エチオピア国観光振興アドバイザー
Tourism Advisor in Federal Democratic Republic of Ethiopia

業務収集資料
Collected Materials

	資料名 Documents	ファイル形式 **PDF**
1	New Tourism Policy (Approved)	✓
2	Ten-Year Tourism Sector Development Plan 2021–2030	✓
3	Tourism Sector Medium-Term Development Plan 2024–2026	✓
4	Sustainable Tourism Master Plan: STMP 2015-2025	✓
5	Tourism Marketing Strategy for Ethiopia 2016-2020	✓
6	IGAD Sustainable Tourism Master Plan 2024-2034	✓
7	World Bank Resource Inventory Report (Draft)	✓
8	2024 International Tourism Exit Survey	✓
9	Ethiopia Tourism Satellite Account 2024 **（添付省略 Not included）**	–
10	Basic Study on Tourism Sector in Ethiopia, MEK Hive Consulting Group PLC, 2023	✓





FEDERAL DEMOCRATIC REPUBLIC OF ETHIOPIA

Tourism Policy

(Approved)

February, 2026

Addis Ababa, Ethiopia

Table of Contents

1. Introduction 3
2. Policy Foundations 4
3. Policy Necessity, Principles, and Objectives 6
3.1. Necessity of Revising the Tourism Policy 6
3.2. Vision 7
3.3. Policy Principles 7
3.4. Policy Objectives 9
4. Main Policy Issues and Directions 9
4.1. Tourism Destination Development and Administration 10
4.2. Protection and Utilization of Historical, Cultural, and Natural Heritage 16
4.3. Technology Use in the Tourism Sector 19
4.4. Private Sector Participation 20
4.5 Service Quality 22
4.6 Tourism Marketing and Promotion 25
4.7 Tourism Sector Capacity Building 28
4.8 Cooperation and Strategic Partnership 30
5. Key Policy Outcome Areas 32
6. Authority and Scope of the Policy 32
7. Policy Implementation Strategies 32
7.1 Implementing Institutions and Responsibilities 32
7.2 Legal Frameworks and Procedures for Policy Implementation 36
7.3 Development Programs to Ensure Key Results of the Tourism Policy 36
7.4 Monitoring and Evaluation System 38
8. Other Related Development Policies 39
8.1 Economic Development Sectors and Infrastructure Policies 39
8.2 Social and Human Resource Development Policies 39
8.3 Science, Innovation, and Technology Policy 40
8.4 Justice and Administration Policies 40
9. Basic Definitions of Terms 40

1. Introduction

Ethiopia is a country endowed with diverse and extensive tourism resources. These magnificent historical, cultural, and natural assets have enabled our country to possess vast development opportunities in the tourism sector. It is well known that the tourism sector plays a significant role in realizing Ethiopia's economic growth and structural transformation by developing existing attractions and expanding destinations. The sector has been contributing its share in terms of generating foreign exchange, creating job opportunities, increasing national income, benefiting community members located in destination areas, preserving heritages, and building the country's image.

To enhance the multi-faceted contribution of the tourism sector to our country, it is recalled that the Tourism Development Policy has been in place since 2009 (2001 E.C.). Following this, based on the national development strategies and policy directions implemented in successive years, extensive efforts have been made for the sector to play its part in political, economic, social, and cultural growth. Consequently, the direct contribution of the sector to the growth of the Gross Domestic Product (GDP) is significant, having increased visitor flow and revenue, expanded tourism investment, and created jobs. On the other hand, based on the policy over the past years, the sector has exerted its own positive influence in terms of poverty reduction beyond highlighting its social utility.

However, compared to Ethiopia's potential tourism resources, it cannot be said that the results achieved are satisfactory. Our country's level of international tourism competitiveness is low. In this regard, the old tourism development policy had limitations in enabling the sector to contribute the expected share. There has been an inability to ensure integrated and sustainable tourism development, minimal work in developing new destinations, and a lack of strengthening the accessibility of attractions to the required level. Additionally, because effective marketing and promotion work was not sufficiently performed, it was not possible to create new markets or significantly increase market share. Due to the lack of a favorable business ecosystem, major gaps were observed in expanding small and medium tourism business enterprises and creating job opportunities in the sector. In general, the policy is characterized by numerous gaps when measured against solving the key challenges that have hindered the sector.

Therefore, based on the vast tourism resources our country possesses, we are expected to increase competitiveness by expanding tourism destinations and products. It is necessary to expand tourism investment, create job opportunities for citizens, ensure service excellence in the sector, and increase visitor flow and market share by creating strong market links with visitor-generating countries. Strengthening the link with other sectors is crucial to ensure the protection of historical, cultural, and natural resources and to guarantee sustainable benefits. It became necessary to revise the old policy in a way that enables a significant increase in the revenue gained from the sector and its contribution to the overall growth of the Gross Domestic Product (GDP). Therefore, by using the attention given to the tourism sector as a favorable opportunity for the country, it has been found necessary to improve the policy to solve unsolved challenges, fill observed gaps, and fully utilize the development potential and opportunities of the sector. Furthermore, the old policy has been revised in depth to lead the sector in a manner consistent with the changing characteristics of global tourism demands and changes, and to enable it to generate the desired economic, social, and environmental benefits.

2. Policy Foundations

The old Tourism Development Policy contained the concept of leading our country's tourism sector in a broad development direction. It was a policy that included major policy issues and strategies to develop existing and new tourism attractions and destinations, expand infrastructure and service-providing institutions essential for tourism development in type, size, and quality, create strong market linkages through promotion and marketing to become competitive in the international tourism market, strengthen cooperative relationships among actors participating in tourism development, and solve the high capacity limitations observed in the sector.

By implementing these focal areas and directions, the tourism sector played a positive role in efforts to ensure rapid and sustainable growth using our country's numerous historical, cultural, and natural heritages. Initial efforts were made in strengthening existing attractions, developing new ones, and improving destinations. Furthermore, encouraging work was done in expanding infrastructure, products, and services crucial for the growth of the sector in a way that improves international competitiveness. Efforts were made to increase the coverage of wildlife protection

areas, protect endemic wildlife and their habitats, register cultural and natural heritages with UNESCO for international recognition, and perform maintenance on them.

Favorable conditions were created for service-providing institutions to expand and for international brand hotels to enter the country and provide services. To improve the quality of services provided in the sector, a grading and certification system was implemented. On the other hand, extensive efforts were made to increase the coverage of trained human power in the sector and reduce the high human resource shortage that previously existed. Regarding tourism marketing and promotion, a national brand called "Land of Origins" was designed, and work to promote Ethiopia and instill the brand was carried out through various methods domestically and abroad. Efforts were made to introduce tourism resources, destinations, and investment opportunities by participating in international tourism trade fairs, creating business-to-business links, and disseminating information.

However, the major challenges clearly observed were: the policy lacked a complete legal framework and a clear implementation strategy; it gave minimal attention to sustainable tourism development and competitiveness; there was a lack of a favorable investment environment and a deficiency in investment incentive systems; technology use in the sector was low and lacked proper attention; coordination among tourism actors was loose; the implementation capacity of the sector was low; tourism marketing and promotion activities were ineffective; insufficient attention was given to domestic tourism development; favorable conditions were not created for small and medium tourism enterprises; financial supply for sector development was limited; regional and international tourism cooperations were neglected; the competitiveness of the human power engaged in the sector was low; protection and utilization of natural and cultural resources were weak; and community participation and benefits at destinations were limited.

Because of this, Ethiopia has not been promoted at the desired level on the international stage, its international tourism competitiveness remains low, tourism products have not expanded in type and quality, private sector participation has not been strengthened, tourism investment has not grown as desired, visitor service quality has not been ensured, job opportunities have not expanded, visitor flow and tourism revenue have not grown to the desired extent, and the economic, social,

and ecological benefits gained from the sector remain low. Therefore, the sector's contribution to the Gross Domestic Product (GDP) remains at a low level relative to its potential.

On the other hand, it is necessary to create a situation where political, economic, and social changes created as a country can be accommodated in a new policy framework. Due to national changes, the tourism sector has been made one of the key economic sectors given priority. Therefore, it is crucial to enable the sector to be harmonized with new policy perspectives and national development strategies. Additionally, it is mandatory to revise the tourism policy in a manner that accommodates the changing nature of the tourism sector, moving in tandem with global political, economic, social, technological, and other changes.

Therefore, to solve the challenges encountered in the implementation of the old policy, fully utilize created good opportunities, and properly manage the changing nature of the tourism sector, it became necessary to revise the existing Tourism Development Policy.

3. Policy Necessity, Principles, and Objectives

3.1. Necessity of Revising the Tourism Policy

The fundamental reasons for needing to revise the 2009 (2001 E.C.) Tourism Development Policy are as follows:

- Because it is necessary to set timely policy principles, visions, and directions by correcting the policy focus areas and implementation gaps observed in the Tourism Development Policy designed and implemented in 2009;
- Because it is necessary to lead and develop the tourism sector in connection with the Homegrown Economic Reform program by designing policy directions that match the special attention given by the government to the tourism sector and its inclusion among key economic sectors;
- To ensure the effectiveness of the sector by accommodating changes occurring in terms of the sector's dynamic characteristics and by extensively utilizing good opportunities and development potentials, thereby enabling it to play a significant role in national growth;
- To make Ethiopia a preferred and competitive tourism destination by properly identifying and developing our vast tourism resources, expanding destinations, strengthening tourism

products and services in type, size, and quality, and increasing private sector investment and participation;

- To enable the building of the country's image on the world stage, the creation of reliable market links with visitor-generating countries, and an increase in visitor flow and market share by strengthening research-based, result-oriented tourism marketing and promotion;
- To establish equitable benefit-sharing by ensuring competitive and inclusive tourism development using the sector's latent development potential and generating multi-faceted national benefits;
- Because it is necessary to ensure that historical, cultural, and natural resources are protected and utilized sustainably in a manner based on study and research;
- This policy was prepared because of the need to build strong implementation capacity by enhancing the relationship and coordination between the tourism sector and other sectors, strengthening cooperation, using new technological results, and establishing a complete legal framework and operational system.

3.2. Vision

To see Ethiopia as one of the leading tourism destination countries in Africa by 2035 (2027 E.C.) through ensuring competitive and sustainable tourism development.

3.3. Policy Principles

3.3.1. Cooperation and Partnership

Strengthening the inclusive participation, cooperation, and partnership of the sector's stakeholders in tourism development is a primary principle of the policy. The contributions made by actors moving within the tourism sector should be based on cooperation and centered on vertical and horizontal linkages. It will be led in a manner that strengthens strong cooperation and partnership around common goals with institutions working in the sector at national, regional, continental, and international levels.

3.3.2. Inclusivity

To ensure tourism development, work will be done to guarantee the fair participation, benefit, and accessibility of all community sections, as well as religious institutions, cultural institutions, women, youth, and persons with disabilities who are owners of tangible and intangible resources, in any sector planning and decision-making. Local communities will be made beneficiaries of the interest by fairly developing and promoting tourism destinations located in all parts of our country. Tourism development activities will be made to ensure the special needs of visitors, particularly universal accessibility. The policy will be implemented in a manner that strengthens the role of micro and small tourism business organizations located at destinations.

3.3.3. Sustainable Tourism Development

Tourism development activities will be viewed in a way that generates sustainable economic benefits as well as ecological and social utility. It will be led with focus through government and private sector participation to enhance historical, cultural, and natural heritage protection, maintenance, registration, development, and utilization. The policy follows a direction that enables the improvement of community participation and benefit to ensure sustainable tourism development. Religious and cultural institutions will actively participate in protecting tangible and intangible resources; they will be made to have a crucial role in sustainable tourism development. Making tourism play a positive role in heritage protection and natural resource care, and reducing negative social, ecological, and economic impacts that may occur in the sector, are the focal points of the policy.

3.3.4. Technology-Oriented Tourism Development

Since the tourism sector is highly linked with technological changes and technology is one of the major factors determining competitiveness, tourism development activities carried out as a country will be led with a focus on generating, adapting, and using new technological results. To enable the enhancement of technology use capacity and the strengthening of the tourism value chain, the policy follows a technology-centered tourism development direction.

3.3.5. Service Excellence

Since tourism is a sector largely based on service, it is necessary to build a culture that enables providing quality service with good hospitality in every service value chain. Policy directions will be implemented in a manner that ensures services provided by the government, the private sector, and other tourism sector actors are efficient and convenient, and that all services provided in the sector are excellence-centered. The policy will be implemented in a way that ensures sustainable and competitive tourism development by providing internationally accepted services from service-providing institutions.

3.4. Policy Objectives

The main objective of the policy is to ensure multi-faceted benefit by increasing the competitiveness and sustainability of the tourism sector, and it will have the following specific objectives:

- To enhance the contribution of the tourism sector to the overall growth of the Gross Domestic Product, foreign exchange earnings, and job creation;
- To develop and expand tourism destinations;
- To increase the protection, development, and sustainable utilization of historical, cultural, and natural heritages;
- To increase technology utilization in the tourism development sector;
- To increase the service quality of the sector;
- To increase the effectiveness of tourism marketing and promotion activities;
- To produce competent human resources in the sector, build institutional capacity, and strengthen cooperation and strategic partnership.

4. Main Policy Issues and Directions

Eight main policy issues have been identified to ensure the holistic growth of the tourism sector. These are: Tourism Destination Development and Administration; Protection and Utilization of Historical, Cultural, and Natural Heritages; Technology Use in the Tourism Sector; Private Sector Participation; Service Quality Excellence; Tourism Marketing and Promotion; Building the Capacity of the Tourism Sector; and Strengthening Cooperation and Strategic Partnership.

4.1. Tourism Destination Development and Administration

It is necessary to develop and expand tourism products, enhance competitiveness, and increase the economic, social, and environmental benefits gained from the tourism sector by identifying tourism assets in depth and devising conditions for their sustainable development. Expanding tourism infrastructure is one of the policy's missions to better grow the sector.

To sustainably increase the quality and competitiveness of tourism destinations, it is necessary to improve destination administration by implementing sustainability practices and standards.

Furthermore, it is crucial to ensure visitor safety by establishing a visitor protection system that enables them to have a successful visit movement while maintaining safety at destinations. On the other hand, it is necessary to ensure that community sections located in tourism destination areas benefit from tourism development and to prevent and reduce negative impacts caused by tourism.

4.1.1. Developing and Expanding Tourism Products

In the old policy, gaps observed in implementing destination development programs that enable the sustainable and integrated development of tourism resources by identifying tourism assets and development opportunities through research have been obstacles to the expected good performance in the sector. There was no policy coverage that enabled the development of tourism resources by implementing an effective and integrated sustainable tourism development strategy using our diverse tourism resources. Therefore, the work done in terms of increasing the positive contribution of the sector by developing different types of tourism based on various tourism assets, adding value to existing tourism resources and destinations, and strengthening existing tourism types and developing new ones based on market demand is low. Because special tourism investment zones were not demarcated to increase investment in the sector, it was not possible to properly use tourism investment opportunities. Although we have vast development opportunities for Event Tourism (MICE), gaps are observed in making it develop with special focus. Additionally, it is necessary to implement various procedures and develop additional tourism products to bridge the seasonality gap in the tourism market. Therefore, the following policy directions will be implemented:

1. National tourism assets and development opportunities will be identified through research; destination development programs, development plans, and projects that enable the sustainable and integrated development of resources will be designed and implemented.
2. To increase the competitiveness of the sector, special tourism investment zones will be demarcated, and special corridors/hubs for tourism development will be established.
3. Effective and integrated tourism routes (Tourism Circuits) will be established using our diverse tourism resources; a system will be established that enables regions to cooperatively develop their shared tourism resources.
4. A national sustainable tourism development strategy will be prepared and implemented.
5. Strategies and procedures that enable the development of different tourism types based on our tourism assets will be prepared and implemented.
6. Existing tourism resources and destinations registered as World Heritage and others will be made more preferred by performing various value-adding tourism events.
7. Based on existing tourism assets and market demand, existing tourism types will be strengthened and new tourism types will be developed.
8. Gift items reflecting the culture and values of the destination area will be expanded in size, type, and quality at each destination. Traditional craft villages and markets will be established.
9. An operational system will be established to solve the seasonality gap of the tourism market.
10. Considering our country's latent potential, Event Tourism (MICE – Meetings, Incentives, Conferences, and Exhibitions) will be developed and expanded with special focus.
11. Leisure Tourism and other tourism types for which our country is relatively known will be strengthened.
12. A sustainable tourism product development procedure will be prepared, especially from the perspective of enhancing environmental sustainability; recognition will be given to sector product and service providers who fulfill this.

4.1.2. Expanding Tourism Infrastructure

Expanding tourism infrastructure and service-providing institutions is a key issue to reveal our country's numerous tourism attractions and significantly grow tourism benefits. Expanding infrastructure that is vital for tourism development and connects tourism destinations in a research-based manner, making it environmentally friendly, and enabling it to be built conveniently for persons with disabilities, women, children, and other community sections requiring special assistance are among the urgent issues the old tourism development policy did not give much attention to.

Major gaps are seen in expanding international-standard event tourism infrastructure and facilities, making destinations easily accessible, and maintaining visitor comfort.

Furthermore, from the perspective of facilitating regional tourism movements, limitations are observed in cooperatively establishing infrastructure that enables the development of cross-border tourism resources with neighboring countries.

Therefore, the following policy directions will be implemented:

1. Necessary infrastructure and facilities for tourism attractions and destinations (parks, toilets, rest areas, internal roads, natural resource observation towers, directional signs, etc.) will be built and expanded in a research-based manner and following standards.
2. Any tourism infrastructure construction will be built to be environmentally friendly and convenient for persons with disabilities, women, children, and other community sections requiring special assistance.
3. International-standard Event Tourism (MICE Tourism) infrastructure and facilities will be expanded in various cities of our country.
4. To make tourism destinations easily accessible and maintain visitor comfort, a multi-option transport system will be established cooperatively.
5. Work will be done jointly with relevant bodies to fulfill and improve road, electricity, water, telecom, finance, and similar infrastructure necessary for tourism destinations.

6. From the perspective of facilitating regional tourism movements, tourism infrastructure enabling the development of cross-border tourism resources with neighboring countries will be established cooperatively.

4.1.3. Improving Destination Administration

To increase the international competitiveness of the tourism sector, it is necessary to implement new strategies and procedures. Because destination development and administration activities were not done based on impact assessment studies, their negative impact on the ecosystem, biology, and cultural values is high. While any tourism development should be implemented in a way that considers and integrates internationally accepted sustainable tourism concepts and principles, major deficiencies have been observed because this was not the case. Therefore, it is highly beneficial to establish Destination Management Organizations at various levels (national, regional, and district) to coordinate sustainable tourism planning, development, and management.

To sustainably improve the quality and competitiveness of tourism destinations and to create a healthy spirit of competition between destinations, destination excellence measurement criteria were prepared but not implemented. There was a major gap in making tourism development activities at destination sites linked with other development sectors to enhance the tourism value chain and strengthen the sector's economic contribution. It is necessary to improve destination administration by preparing and implementing a code of ethics for all tourism actors and by implementing sustainability procedures and standards.

Therefore, the following policy directions will be implemented:

1. Destination development and administration activities will be improved by conducting a general impact assessment study of tourism development at destinations.
2. Destination Management Organizations coordinating sustainable tourism planning, development, and management will be established at various levels (national, regional, zone, and district).
3. Destination excellence measurement criteria will be prepared and implemented to sustainably improve the quality and competitiveness of Ethiopia's tourism destinations and to create a healthy spirit of competition between destinations.

4. Any tourism development will be implemented in a manner that considers and integrates internationally accepted sustainable tourism concepts and principles.
5. By ensuring that tourism development activities at destinations are integrated with other development sectors, the tourism value chain will be strengthened, and the economic contribution of the sector will be enhanced.
6. A pricing system for entrance fees at various destination sites will be established based on research and by involving tourism stakeholders; a portion of the revenue generated will be allocated for the development of the local community and the destination.
7. To ensure smooth tourism activities and sustainable tourism development, a tourism code of ethics will be formulated and implemented.

4.1.4. Ensuring Visitor Safety

To facilitate smooth visitation at destinations, it is essential to ensure visitor safety by establishing a security system. In the previous policy, there was no reliable system to provide early warning information regarding the peace and security status of destinations, nor was there a travel advisory system to help visitors prevent risks or a health information system for stakeholders in the sector. Generally, it is necessary to prepare and implement standards to protect visitor safety at historical, cultural, and natural attractions, as well as in service-providing institutions. Therefore, the following policy directions will be implemented:

1. A visitor protection system will be established at destinations to ensure their safety and facilitate smooth visitation. A sustainable visitor safety system will be created by enhancing Host-Guest Relations.
2. An Early Warning System will be established regarding the peace and security status of tourism destinations.
3. A reliable system will be established to provide visitors with pre-travel health information to prevent health risks and to deliver health-related information to sector stakeholders; a mechanism for immediate assistance in case of problems will be implemented.
4. Destination sites and service-providing institutions will be required to meet hygiene and health standards; a culture of health and hygiene maintenance will be strengthened.

5. Standards and guidelines will be prepared and implemented to ensure visitor safety at natural sites where adventure tourism (water activities, mountain climbing, jumping, etc.) takes place.

4.1.5. Enhancing Community Participation and Benefit

It is appropriate to ensure that community members near tourism destinations, as well as religious institutions in areas with religious, tangible, and intangible heritage, actively participate in attraction management and become equitable beneficiaries of the sector's development. Mechanisms that benefit persons with disabilities, women, and youth in tourism activities must be implemented. Therefore, the following policy directions will be implemented:

1. To enhance tourism's contribution to sustainable rural development, focused efforts will be made to ensure rural community benefits by encouraging the creation of small and medium enterprises.
2. Community members near tourism destinations, as well as religious and cultural institutions, will be encouraged to participate actively in attraction management.
3. Communities near tourism destinations will be enabled to benefit from the sector's development by supplying products and services to visitors and tourism service providers within the value chain.
4. Communities near tourism destinations will receive training, financing, and other support to benefit from tourism development.
5. A system for the expansion of Community-Based Tourism will be established.
6. Favorable conditions will be created for local communities to be active participants and beneficiaries in ecotourism development activities.
7. Procedures that benefit persons with disabilities, women, and youth will be implemented.
8. Focused work will be done to mitigate the negative impacts of tourism on the cultural, social, religious, and other values of the local community.

4.2. Protection and Utilization of Historical, Cultural, and Natural Heritage

As historical, cultural, and natural heritages are the foundations of tourism development, they play a crucial role in ensuring sustainable tourism. It is necessary to ensure continuous tourism growth by enhancing the protection, restoration, registration, and sustainable use of these invaluable heritages. To enhance the sustainable use of these heritages, development must be carried out in a way that involves the destination community and other stakeholders.

One of the policy's focus areas is to ensure that heritage is passed on to the next generation by protecting it properly, promoting responsible use, and conserving local culture and biodiversity. Integrating heritage protection, restoration, registration, and sustainable use with tourism development is a task that enriches the unique value of the sector.

4.2.1. Enhancing the Protection of Historical, Cultural, and Natural Heritage

To properly protect heritage, it is necessary to carry out technology-supported heritage registration, restoration, utilization, monitoring, and evaluation involving the local community (the primary owners), religious institutions, and other stakeholders. Gaps have been observed in preparing legal frameworks and working with stakeholders to prevent illegal acts and man-made or natural disasters affecting heritage.

Work to increase the coverage of protected areas, restore damaged sites, reduce biodiversity loss, and increase the number of endangered endemic animals and plants has not been performed to the required extent. There is a wide knowledge gap in heritage protection and restoration. Additionally, for heritage in conflict and difficult situations, a system must be implemented to prevent risks and rescue heritage based on international legal frameworks.

Furthermore, the restitution of numerous Ethiopian religious, cultural, and historical heritages looted at various times and taken abroad illegally has been inconsistent.

Therefore, the following policy directions will be implemented:

1. A strategy and system involving the local community, religious and cultural institutions, and other stakeholders will be prepared and implemented for heritage registration, protection, monitoring, and evaluation. This work will be supported by technology.
2. Restoration and care will be provided to heritages while maintaining their historical and cultural values and following international restoration principles. A system involving stakeholders will be established for this.
3. Legal frameworks to prevent illegal acts on heritage will be prepared and implemented in cooperation with stakeholders.
4. Indigenous knowledge and effective experiences will be identified and used for the sustainable protection and development of historical, cultural, and natural heritage.
5. Capacity-building work will be done to create skilled restoration professionals by enhancing indigenous restoration knowledge and linking it with scientific methods.
6. A system based on international legal frameworks will be prepared and implemented to prevent risks and rescue historical, cultural, religious, and natural heritages in conflict and difficult situations.
7. Focused work will be done to increase protected area coverage, restore damaged sites, reduce biodiversity loss, and increase the number of endangered plants and wildlife. Efforts will be made to strengthen wildlife study and research and enhance natural resource protection.
8. A legal framework will be prepared to strengthen law enforcement in wildlife habitats by enhancing community participation.
9. To properly develop and utilize the country's vast geological resources, Geoheritage sites will be protected, and Geoparks will be expanded; the necessary legal framework will be prepared.
10. The restitution of Ethiopian religious, cultural, and historical heritages looted and taken abroad will involve embassies, consulates, religious institutions, Ethiopians, and the diaspora, as well as other stakeholders.
11. Cooperation with international bodies will be established to prevent illegal heritage trafficking. Monitoring will also be conducted to ensure the implementation of international heritage agreements signed by Ethiopia.

12. Work will be done to prevent and reduce the damage caused by climate change on heritage, as well as the impact of tourism on climate change.

4.2.2. Enhancing the Sustainable Use of Historical, Cultural, and Natural Heritage

Developing resources in a way that enhances the sustainable use of historical, cultural, and natural heritage is essential for tourism growth. However, desired success in managing and achieving results for the sustainable use of these resources has not been realized. Minimal work is done regarding Environmental Impact Assessments (EIA), Heritage Impact Assessments, and Social Impact Assessments to identify and plan for negative impacts before development projects begin. Therefore, the following policy directions will be implemented:

1. A strategy will be prepared to ensure the sustainable use of cultural, historical, and natural heritages, as well as religious tangible and intangible resources.
2. Study and research activities will be strengthened to sustainably develop, protect, and enhance the utilization of tourism attraction resources in the country.
3. Environmental, Heritage, and Social Impact Assessments will be implemented before development projects begin.
4. A framework will be established to use natural resources, especially water resources, for sustainable tourism in an integrated and coordinated manner with other development works.
5. Awareness creation and capacity building will be conducted regarding emergency accidents and crisis management at heritage sites, sustainable use of heritage, and tourism development.
6. Resources will be properly protected to generate economic and social benefits by strengthening ecotourism development in wildlife protected areas and other natural resources.
7. Museums (including digital museums) will be expanded and their services enhanced to generate sustainable income and promote the sustainable use of heritage.

4.3. Technology Use in the Tourism Sector

The previous tourism development policy did not have sufficient coverage to utilize technology opportunities and the digital economy potential in the sector. Therefore, it is necessary to work with focus on enhancing tourism technology innovation, developing modern destinations, and promoting them to ensure the sector's digital transformation.

4.3.1. Ensuring the Implementation of Tourism Digital Transformation

Because there was no Digital Tourism Roadmap to modernize the sector from its foundation, tourism marketing and promotion activities have not been sufficiently effective. Therefore, it is necessary to widely introduce digital technology products to facilitate visitor movement, increase satisfaction, improve destination competitiveness, and support new innovative ideas.

Furthermore, focus should be given to enhancing modern technology knowledge and usage in the sector. Developing a Destination Management Information System (DMIS) that integrates tourism labor market data into the National Labor Market Information System to generate quality data for advanced analysis and evidence-based planning is crucial. Therefore, the following policy directions will be implemented:

1. A Digital Tourism Roadmap will be prepared and implemented to modernize the sector from its foundation.
2. Digital technology products will be widely introduced and implemented to enhance tourism marketing effectiveness, facilitate visitor movement, increase satisfaction, and improve destination competitiveness.
3. A system will be established to support new innovative ideas and technology products that facilitate the sector and strengthen competitiveness.
4. Work will be done with focus to enhance modern technology knowledge and usage in the sector.
5. Focused work will be done to create and expand "Smart Tourism Destinations" organized with contemporary technology.
6. Conditions will be facilitated for the sector to be strengthened by Artificial Intelligence (AI) technology based on research.

7. Tourism job and labor market information will be strengthened within the National Labor Market Information System.
8. A Destination Management Information System (DMIS) will be established to provide quality, organized data for advanced analysis and evidence-based planning.
9. Secure, reliable, and convenient digital payment methods and travel applications will be implemented to modernize the tourism payment system.
10. Tourism service providers will be enabled to use new technologies for efficient service, ensuring technology contributes positively to the sector's growth.
11. A framework will be established to work with relevant institutions regarding cybersecurity and visitor data protection for the various digital technologies used.

4.4. Private Sector Participation

Expanding service-providing institutions to better grow the sector is one of the policy's missions. Thus, it is necessary to increase private sector participation and strengthen their capacity. Under previous practices, private sector capacity was not built to the required level, and its contribution to rapid growth has been limited.

4.4.1. Enhancing Private Sector Investment

To increase overall competitiveness and strengthen national benefits, it is necessary to grow tourism investment. Previous legal frameworks and procedures were not adequately updated, negatively impacting the expansion of domestic and Foreign Direct Investment (FDI). Unresolved financial accessibility issues have hindered tourism investment from both domestic and foreign sources. Additionally, it has not been possible to create or strengthen domestic franchises to become internationally competitive.

The previous policy lacked a broad investment incentive system. No special incentives existed for new tourism types or for investors in remote areas with poor infrastructure. Therefore, the following policy directions will be implemented:

1. Necessary amendments will be made to legal frameworks and procedures related to tourism investment to expand domestic and Foreign Direct Investment (FDI).

2. Recognizing the private sector as the engine of tourism development, favorable conditions will be created to increase investment.
3. Collaboration with financial institutions will be undertaken to solve financial supply problems; a system supporting tourism investment will be facilitated.
4. Support will be provided for domestic franchises in tourism and hospitality to be created, strengthened, and become internationally competitive.
5. An investment incentive system will be established to enhance competitiveness and national benefits. Special incentives will be designed for new tourism types and for investors in remote areas or those with significant infrastructure challenges.
6. Challenges related to tax payment will be addressed through joint studies with relevant bodies to ensure a fair, consistent, and competitive tax system.
7. Private sector investment will be encouraged to support green development, and relevant procedures will be established.

4.4.2. Strengthening the Capacity and Participation of the Private Sector

To enable the private sector to play its role in sustainable and competitive tourism development, it is essential to strengthen its capacity and increase its participation. To date, the collaboration between the private and public sectors in our country's tourism development has been weak. Additionally, the contribution of private tourism service providers toward heritage conservation, infrastructure development, and other issues has not been as expected. One reason for this is that a conducive environment has not been created to enhance the private sector's role in these areas. Therefore, the following policy directions will be implemented:

1. Joint tourism development will be expanded by establishing **Public-Private Partnerships (PPP)**. Legal and incentive frameworks that strengthen this collaboration will be prepared.
2. Conducive conditions will be created to increase the private sector's role in **heritage conservation and development**, as well as in heritage registration and management activities.
3. The private sector will be encouraged to play a **key role** in destination development, infrastructure expansion, tourism marketing and promotion, human resource development, and other tourism development activities.

4. A **capacity-building system** will be established to strengthen small and medium tourism enterprises and enable them to grow into large-scale institutions.
5. A system will be developed to enable the private sector to generate new business ideas and transform them into practice for the benefit of the sector, thereby fostering a culture of **entrepreneurship**.
6. To enable the private sector to have an organized and effective contribution to tourism development, support will be provided to strengthen **associations/organizations** and create links with international tourism institutions and peer associations in other countries.
7. A system will be established to enable private tourism service providers to fulfill their **Corporate Social Responsibility (CSR)** regarding environmental protection, infrastructure expansion, and other social issues.
8. In collaboration with stakeholders, a **demand-based, short-term, action-oriented capacity-building training program** will be implemented to produce visionary leaders and professionals with appropriate knowledge for the private sector.
9. Conducive conditions will be created for the establishment of **platforms** where private tourism stakeholders can exchange best practices, create networks, and seek collective solutions for common challenges.

4.5 Service Quality

Providing quality service to visitors is a critical component of competitive and sustainable tourism development. To improve service quality, it is necessary to certify the competence of service providers, classify them into grades, monitor their service delivery, and build their capacity. Additionally, to provide excellent service to international visitors, it is necessary to improve the services they receive upon entry and exit, including visa processes.

4.5.1 Strengthening Competency Certification, Grading, Service Delivery Control, and Support Activities

Certifying the competence of tourism service providers and classifying them into grades plays a significant role in improving service quality. Although competency certification and grading are not new to the Ethiopian tourism sector, it is necessary to strengthen and expand these activities for competitive and sustainable tourism development. The service currently being provided in the

tourism sector does not ensure the sector's international competitiveness. Although hotel grading is being conducted based on the previous tourism development policy, this grading work must continue in a strengthened manner that is non-discriminatory and maintains international standards. There are many informal service providers in the sector whose competence must be verified.

On the other hand, the competency certification directive does not encourage professionals in the sector to enter into investment. A survey conducted on the sector's problems shows that the lack of standards for service providers, the absence of a uniform system to control basic services and fair pricing, failure to follow service levels, and quality issues in accommodation facilities catering to domestic and low-income international visitors are the main challenges. Therefore, the following policy directions will be implemented:

1. An **incentive system** will be designed and implemented to increase the coverage/number of legally recognized service providers.
2. Tourism competency standards and directives will be made to improve the sector's service delivery and encourage the participation of professionals with **knowledge, experience, and skills**.
3. The grading work will be strengthened by establishing a **credible and internationally accepted grading system** for service providers. Following the initial grading, their performance will be evaluated for re-grading.
4. **Special support and monitoring** will be provided to empower institutions that are unable to be included in the grading system.
5. A directive containing the **Minimum Standard** for each tourism service sector will be prepared and implemented.
6. Grading criteria or **minimum requirements** will be prepared for accommodation facilities serving domestic and international visitors with low paying capacity; follow-up will be conducted to ensure proper implementation.
7. A **strong monitoring system** will be established to maintain the quality of visitor services, ensure continuous improvement, and provide **Value-for-Money**; necessary corrective measures will be taken when gaps occur. Uniform criteria for monitoring and control will be prepared at the national level and distributed to relevant bodies.

8. A system will be established to provide **professional support** to service institutions from the design phase through the completion of construction until they begin operations.
9. A **Total Quality Management (TQM) system** will be established to help tourism service providers improve their procedures and elevate the level of their services.
10. Conducive conditions will be created for the private tourism sector, the community, and individuals to **organize and establish associations**, become a voice for their representatives, monitor service quality, and contribute to the professional growth of the sector.

4.5.2 Improving Services for Visitors Entering and Leaving the Country

To attract international visitors to our country, the entry and exit process must be simple, efficient, and convenient. One of the primary ways many countries increase international visitor numbers is by making the visa process convenient and fast. Although there have been periodic improvements regarding visas in our country, many improvements are still needed in **visa issuance and customs procedures** to increase international visitor numbers. It is mandatory to ensure customs, immigration, and airport services are reliable and **customer-centric**. Visitor transport services must also be made efficient and comfortable. Therefore, the following policy directions will be implemented:

1. Collaborative work will be done with relevant bodies to make the **visa process simple, efficient, and convenient** to attract more international visitors.
2. Collaboration with relevant bodies will ensure that **customs procedures** and other entry/exit services facilitate travel, are improved in a way that balances national security, and remain customer-centric.
3. Services will be provided within **airports** that create a positive attitude and image among visitors.
4. An operational system will be established to provide **efficient and comfortable transport services** for visitors.
5. Based on relevant laws and regulations, a system will be established to provide **fast responses** to problems encountered by visitors upon entering or leaving Ethiopia.

4.6 Tourism Marketing and Promotion

Taking into account international and national dynamics and market competition, it is appropriate to carry out marketing and promotion based on market research and actual market information and needs. Based on this, it is necessary to promote our country's tourism resources, expand the tourism market, and increase market share.

4.6.1 Expanding the Tourism Market and Increasing Market Share

Compared to other African countries, Ethiopia has a low tourism market share, and most of our international market focus is on a few traditional markets. Therefore, it is appropriate to prepare a **tourism market development strategy** that understands the future and increases market share. The policy review study indicates several limitations in diversifying market types and increasing market share, including: weak market identification and selection; lack of special support frameworks for tourism as an export sector; low focus on **Event (MICE) and Stopover tourism**; low attention to domestic tourism; inappropriate travel bans issued by embassies/consulates; and the inability to evaluate the effectiveness of market development and promotion. Therefore, the following policy directions will be implemented:

1. A **forward-looking market development strategy** based on research will be designed and implemented. The strategy will give special focus to **Event and Stopover tourism**.
2. Market identification and selection will be conducted based on the country's tourism resources/products and visitor preferences. This will include **domestic visitors, the diplomatic community living in Ethiopia, and international visitors** (both new and existing, as well as the Ethiopian Diaspora).
3. As this policy recognizes tourism's vital role in **service exports**, the sector will be supported through **special export support frameworks** to utilize its potential for generating foreign currency.
4. Collaborative work will be done with relevant bodies to eliminate, reduce, or correct **unjustified travel bans** issued by embassies and consulates. Follow-up will be conducted to ensure travel warnings based on specific information are adjusted as conditions change.

5. A **Domestic Tourism Strategy** will be prepared and implemented to use domestic tourism as a tool for economic growth, social cohesion, peace, mutual understanding, and nation-building.
6. Systems will be established to encourage Ethiopians to visit their country through various organizations (e.g., government and private offices enabling employees to visit destinations at least once a year). Existing structures like **"Know Your Country" clubs** and travel associations will be strengthened and expanded in educational and work institutions.
7. A **conducive environment and incentive system** will be prepared for tour operators, travel agents, and associations focusing on domestic visitors and domestic tourism.
8. A **monitoring and evaluation system** will be established to measure the effectiveness of market development and promotion activities.

4.6.2 Strengthening Tourism Promotion Work

The number of international tourists visiting Ethiopia grew from 468,000 in 2010/11 (2002/03 E.C.) to 1,295,372 in 2023/24 (2016/17 E.C.). However, the visitor flow is not increasing at the desired speed, and it is known that numbers decreased in certain years due to various internal and external pressures. Overall, the number of tourists visiting Ethiopia is very low compared to the country's potential.

Policy analysis reveals several problems regarding promotion, including: failure to highlight the country's **unique and specific features**; limited use of promotional methods; **weak digital promotion**; the seasonality of visitor flow; visitor concentration on only a few known sites; lack of **Branding** for various destinations and tourism types; absence of international marketing representative offices; fragmented promotional work; weak information centers; inability to use the **creative industry** for promotion; and lack of strong promotion for domestic visitors. Therefore, the following policy directions will be implemented:

1. International promotion and image-building will focus on the country's **unique identifiers and special characteristics**, highlighting Ethiopia's positive image and changing negative perceptions previously held on the world stage.

2. Targeted promotion will be conducted through **creative methods** based on visitor types and needs, including participation in national and international tourism trade fairs, exhibitions, and **Familiarization (FAM) Tours**.
3. **Sub-brands** based on the national brand and creative concepts will be developed for destinations (Regions and Cities) and various tourism types (Event, Eco-tourism, Geo-tourism, Culinary tourism, etc.).
4. A **credible digital information center** will be established to provide useful, accurate, and timely information about Ethiopian tourism and promote attractions, products, and services.
5. Promotional work will be done to encourage visitors to explore **new sites**, encourage event participants to visit attractions, and ensure **year-round visitor flow**.
6. In collaboration with renowned organizations, **international-standard tourism trade fairs** will be organized in Ethiopia.
7. Collaborative efforts will be made to open **overseas tourism marketing and promotion offices** in selected countries to promote Ethiopia to international visitors (including the Diaspora).
8. A **National Tourism Board**, composed of government and private sector representatives, will be established to coordinate Ethiopia's tourism promotion activities.
9. Various integrated activities will be carried out to build Ethiopia's **national image** at the international level.
10. Based on research, existing **Visitor Information Centers** will be strengthened, and new centers will be opened at selected destinations.
11. Various **awareness-creation and incentive programs** will be conducted to encourage the general public, and specifically different social groups, to visit the country's tourism attractions.
12. The **creative industry** will be engaged to play an effective role in tourism promotion and image building; focus will be given to promoting the country by facilitating the production of **renowned artistic works, including films**, at tourism attractions and destinations at national and international levels.

4.7 Tourism Sector Capacity Building

As tourism is a key sector for Ethiopia's economic development, gaps in administration, leadership, human resource development, and evidence-based decision-making must first be resolved to enable the sector to play its rightful role in national growth. Gaps observed in creating strong institutions and procedures must be addressed strategically. Since tourism is a service sector, it is essential to provide quality service to achieve necessary development and growth. To provide quality service, it is highly necessary to produce a competent workforce and build institutional capacity.

4.7.1 Developing the Sector's Human Resources

Tourism is a sector that requires extensive human resource deployment. The success of the sector depends primarily on the quality of its human resources. Studies indicate that the majority of the workforce currently engaged in the tourism sector is not professionally trained. Although training and capacity-building efforts are underway to produce a competent workforce, there is still a significant gap in meeting the sector's demands.

Policy research indicates that the primary bottlenecks are the absence of a human resource development strategy, lack of leadership and technical skills, programs not based on actual needs, failure to establish centers of excellence for quality education and problem-solving research, gaps in professional certification programs, weak research capacity, inability to attract talented personnel, and lack of professional organization. Therefore, the following policy directions will be implemented:

1. A **Tourism Sector Human Resource Development and Capacity Building Strategy** will be developed and implemented based on demand and supply studies to enhance quality and productivity.
2. A system will be established to regularly assess and evaluate the balance between **skill demand and supply**, identifying and filling gaps.
3. In collaboration with stakeholders, a **short-term, practice-oriented capacity-building program** will be implemented to produce visionary leaders and knowledgeable

professionals for the government, as well as for religious and cultural institutions that manage heritages.

4. **Professional Certification Programs** will be designed and implemented in collaboration with relevant bodies for tourism and hospitality professionals—specifically managers, chefs, tour guides, event organizers, and consultants; capacity-building work will be performed based on identified gaps.
5. Educational and training institutions in the sector will be strengthened to produce a quality workforce. Efforts will also be made to expand **centers of excellence** in the sector.
6. A system will be established to ensure that graded tourism service providers are organized and led by **trained professionals**.
7. Work will be done with relevant authorities to integrate **tourism education** into the curriculum at various levels.

4.7.2 Enhancing the Sector's Institutional Capacity

Strengthening institutional capacity is necessary to ensure sustainable and competitive tourism development, maximize economic benefits, and mitigate negative impacts. Key institutional challenges include structural misalignment, unorganized and weak information exchange, fragmented forums, lack of a dedicated problem-solving research institution, absence of a disaster prevention and mitigation system, weak job creation culture, low implementation capacity, financial constraints, and the lack of a uniform system to recognize exemplary institutions. Accordingly, the following policy directions will be implemented:

1. **Structural alignment and harmony** will be created between Federal and Regional government tourism institutions based on objective realities. Focus will also be placed on strengthening the structural relationship between tourism institutions and other sector institutions.
2. A **Tourism Sector Institutional Capacity Building Program** will be designed and implemented.
3. A **technology-aided system** will be established to enable vertical and horizontal cooperation and information exchange between Federal and Regional institutions.
4. A **strong and reliable information system** will be ensured within the tourism sector.

5. To measure tourism's macroeconomic contribution, **Tourism Satellite Account (TSA)** activities will be performed regularly.
6. **Research conferences, workshops, and forums** will be organized for stakeholders to exchange best practices, create networks, and find collective solutions to shared problems.
7. A **National Tourism Research Institute** will be established to conduct studies and provide necessary research-based support.
8. A **National Tourism Crisis Prevention and Recovery Master Plan** will be developed and implemented to define stakeholder roles and enable disaster precaution, prevention, and control.
9. **National Incubation and Innovation Centers** will be established in cooperation with stakeholders to generate new ideas, support unique discoveries, and encourage practice-oriented research.
10. To enhance government execution capacity, work will be done to **review existing legal frameworks**, draft new ones, and build enforcement capacity.
11. A **National Tourism Development Fund** will be established to strengthen the sector's capacity.
12. A **reward and recognition system** will be established for individuals and institutions showing excellence in various fields, and an entity will be formed to implement this.

4.8 Cooperation and Strategic Partnership

Due to its nature, tourism interacts with many sectors and requires the cooperation and partnership of various stakeholders to be effective. It is appropriate to implement a policy that involves stakeholders, creates cross-sectoral linkages, and encourages strategic partnerships to utilize tourism's potential for sustainable development.

4.8.1 Increasing Tourism Stakeholder Participation and Cooperation

Tourism administration must follow a decentralized system to involve all stakeholders. Sustainable development requires the participation of the government, the private sector, and the local community. Research shows that previous gaps included low stakeholder cooperation, a lack of collaborative structures, and the absence of legal frameworks. To address this, the following directions will be taken:

1. A **Stakeholder Participation Strategy** will be developed to engage stakeholders on common issues.
2. A **Tourism Training and Education Coordination Forum** will be established where all institutions (including the private sector) participate in curriculum design, internships, externships, and practice-oriented training.
3. A **Tourism Council** consisting of various stakeholders will be established at National, Regional, Zonal, and Woreda/Destination levels to solve key problems and lead the sector.
4. **Legal frameworks** for proper leadership and administration will be drafted and implemented in collaboration with relevant bodies.
5. Efforts will be made to enable **religious institutions (heritage owners), the private sector, and local communities** to provide necessary support for heritage protection and tourism development.

4.8.2 Strengthening Strategic Partnerships at the International Level

International cooperation contributes significantly to competitiveness and sustainable development. The previous policy lacked focus on international partnerships. Key problems included the failure to use tourism as a tool for foreign diplomacy and the inability to adopt international best practices. Therefore:

1. Tourism will be used as a **key economic and public diplomacy tool** in diplomatic relations to support international trade, Foreign Direct Investment (FDI), and strengthen people-to-people relations.
2. **Bilateral and multilateral cooperation** will be established and strengthened with foreign governments, regional, and international organizations.
3. Cooperation will be sought from international bodies for **sustainable tourism development and heritage protection**.
4. To strengthen regional linkage, **cross-border tourism resources** shared with neighboring countries will be protected and developed.
5. Active participation in regional and international forums will be used to bring **best practices** in research, product development, marketing, and innovation to Ethiopia.

6. Conducive environments will be created for the **private sector** to work in cooperation with the private sectors of other countries.

5. Key Policy Outcome Areas

The effectiveness of the tourism policy will be verified through five key outcome areas:

- **5.1 Increased Economic Benefit:** Measured by investment growth, job creation, market share, revenue growth, and contribution to GDP through the development of new destinations and infrastructure.
- **5.2 Improved Conservation of Heritage:** Measured by the number of protected and renovated historical, cultural, and natural sites, as well as the reduction of illegal acts against heritage.
- **5.3 Competent Human Resources and Strong Institutions:** Measured by the availability of a skilled workforce and the implementation of modern information systems and research institutes.
- **5.4 Increased Stakeholder Participation:** Measured by the strength of partnerships and the functionality of the Tourism Council.
- **5.5 Excellence in Service Quality:** Measured by the number of certified and graded service providers, improved visitor satisfaction, and the use of technology.

6. Authority and Scope of the Policy

- **6.1 Policy Authority:** This policy was initiated by the Ministry of Tourism and shall be implemented upon approval by the **Council of Ministers**.
- **6.2 Scope:** The policy applies to tourism development across Ethiopia, including heritage identification, destination management, technology usage, marketing, and capacity building.

7. Policy Implementation Strategies

7.1 Implementing Institutions and Responsibilities

A **Policy Implementation Unit** will be established within the Ministry of Tourism. This unit will develop action plans, create awareness, coordinate evaluations, and help adopt best practices.

Additionally, a **National Tourism Council** will be established to coordinate and monitor implementation.

7.1.1 Responsibilities of Federal Executive Bodies

- Allocate budgets for tourism programs and facilitate financial supply.
- Strengthen international promotion, image building, and Diaspora participation.
- Ensure efficient **Airport, Immigration, and Customs** services for visitors.
- Create a conducive investment climate and implement incentive systems.
- Expand transport infrastructure (Road, Air, Rail, and Water) connecting destinations.
- Conduct research to solve bottlenecks and produce a competent workforce.
- Support **Urban Tourism** (public facilities, parks) and **MICE** (Meetings, Incentives, Conferences, and Exhibitions).
- Ensure health facility expansion at destinations and support **Medical Tourism**.
- Foster linkages with agriculture for **Agro-Tourism** and support **Green Tourism**.
- Prevent illegal trafficking of heritage and wildlife.
- Support **Digitalization** and domestic tourism movements (visit clubs).

7.1.2 Responsibilities of Regional Executive Bodies

- Lead the implementation of programs and strategies derived from the National policy.
- Enact regional laws aligned with Federal legal frameworks.
- Strengthen regional institutional structures and coordinate vertical/horizontal work.
- Identify and develop local tourist attractions and improve regional competitiveness.
- Ensure a conducive environment for investors within the region.
- Collaborate with local communities to protect heritages and conservation areas.
- Improve service quality based on national standards and regulate unauthorized providers.
- Work with regional educational institutions to build human resource capacity.
- Ensure local communities participate in and benefit from tourism development.
- Organize, generate, and distribute sector-related regional data.
- Perform regional destination marketing and image-building activities.

7.1.3 Responsibilities of the Private Sector

- **Leading Participation:** Acting as a primary participant in tourism development by providing tourist service institutions and facilities in terms of type, volume, and quality.
- **Investment Growth:** Increasing investment in the sector and expanding job opportunities by establishing small, medium, and large service institutions and enterprises.
- **Innovation Culture:** Generating and implementing new business ideas that support the sector to foster and instill a culture of entrepreneurship.
- **Marketing and Promotion:** Actively participating in tourism marketing and promotion activities to effectively contribute to the nation's image-building efforts.
- **Education and Training:** Collaborating with relevant bodies to ensure the creation of competent educational and training institutions that produce professionals skilled in knowledge and expertise.
- **Infrastructure Support:** Supporting the expansion of infrastructure at tourism attractions, destinations, and along tourist routes.
- **Quality Service:** Providing quality services to tourists that are commensurate with the price paid.
- **Capacity Building:** Ensuring service institutions are organized and led by trained professionals, and building the capacity of employees within these institutions.
- **Domestic Tourism:** Focusing on domestic tourism development to encourage citizens to know their country and foster a culture of visiting.
- **Ethical Competition:** Ensuring a culture of healthy business competition by adhering to tourism sector codes of conduct and other relevant laws.
- **Sustainability:** Contributing to the strengthening of sustainable tourism development by implementing sustainable service delivery and business practices.
- **Heritage Conservation:** Actively participating in the protection of historical, cultural, and natural heritage.
- **Advocacy:** Protecting rights and interests by strengthening organizations/associations and actively participating in international coordination, alliances, and partnership frameworks.

7.1.4 Role of Civil Society Organizations

- **Development Participation:** Being a leading participant in tourism destination development and management activities.
- **Research and Solutions:** Identifying sector problems through study and research and generating potential solutions.
- **Policy Support:** Participating in the process of formulating, implementing, and improving strategies and plans that support the sector.
- **Capacity Building:** Conducting training and capacity-building activities for entities engaged in the sector.
- **Institutional Collaboration:** Supporting the sector in an organized manner by creating cooperation with peer institutions.
- **Technical Support:** Providing consultancy, technical support, advocacy, and coordination work for other entities in the sector.
- **Knowledge Exchange:** Organizing forums, conferences, and seminars for knowledge sharing and exchange of ideas.
- **Professionalism:** Supporting the sector to operate with trained professionals, guided by scientific methods, and supported by advanced information management systems.
- **Financing:** Searching for and generating essential finance for the development of the sector.
- **Innovation:** Generating ideas that enable the creation of new procedures, supporting their implementation, and documenting best practices.

7.1.5 Role of the Destination Area Community

- **Ownership:** Ensuring active participation in local tourism development by protecting and caring for tourism resources with a sense of ownership and directly participating in destination development and management.
- **Hospitality:** Receiving guests coming to visit local attractions with a good spirit, providing appropriate care, and hosting them according to the local culture of hospitality while maintaining local peace and security.

- **Product Delivery:** Providing tourism products and services based on visitor needs while preserving the local cultural and social values.
- **Impact Mitigation:** Ensuring that tourism activities in the area are compatible with social and cultural values and maintain natural environmental balance; preventing negative impacts of tourism.
- **Community Tourism:** Actively participating in the implementation of community-based tourism activities and projects.
- **Ecotourism:** Working in collaboration with relevant governmental and non-governmental bodies to strengthen ecotourism development.

7.2 Legal Frameworks and Procedures for Policy Implementation

New legal frameworks will be prepared, and existing ones will be amended based on studies to implement this policy effectively.

7.3 Development Programs to Ensure Key Results of the Tourism Policy

To increase the economic benefits derived from the sector, the following programs will be implemented:

- **Tourism Product Development Program:** Identifying tourism assets and development opportunities to increase the type, quantity, and quality of tourism products.
- **Tourism Infrastructure Expansion Program:** Ensuring the fulfillment of necessary infrastructure such as roads, transport, electricity, water, telecom, and financial institutions at destinations.
- **Investment and Enterprise Development Program:** Making investment in the sector convenient and efficient, and increasing the number of tourism enterprises.
- **Destination Management Program:** Developing tourism destinations sustainably, increasing their competitiveness, and strengthening linkages with other sectors.
- **Domestic Tourism Development Program:** Enabling domestic tourism to grow and serve as a tool for economic growth, social cohesion, peace, mutual understanding, and nation-building.

- **International Tourism Development Program:** Increasing the number of foreign visitors and foreign exchange earnings by promoting the country's attractions using creative, technology-assisted, and diverse methods.
- **Event Tourism Development Program:** Expanding infrastructure and facilities to utilize the country's potential for event tourism.
- **Stopover Tourism Development Program:** Enabling transit passengers staying for an extended time at Bole International Airport to visit Addis Ababa.

Improving Protection and Utilization of Heritage:

- **Heritage Conservation Program:** Identifying, repairing, and protecting historical, cultural, and religious heritage with the involvement of the community and religious institutions; creating awareness; preventing illegal acts; and recovering heritage taken out of the country illegally.
- **Natural Resource Protection and Management Program:** Increasing the coverage of protected areas, recovering degraded sites, reducing biodiversity loss, and increasing the population of rare flora and fauna.
- **Sustainable Resource Utilization Program:** Ensuring tourism development is integrated with other sectors and that environmental, heritage, and social impact assessments are conducted before development works begin.

Creating Competent Human Resources and Strong Institutional Capacity:

- **Human Resource Development Program:** Building the capacity of government, private, and stakeholder leaders and professionals through practice-oriented training and education.
- **Institutional Capacity Building Program:** Correcting structural misalignment among government tourism institutions and creating platforms for common consultation.
- **Tourism Information and Research Program:** Improving data management and quality, strengthening Tourism Satellite Accounts (TSA), and establishing innovation centers.

Increasing Stakeholder Participation and Partnership:

- **Multilateral Tourism Management Program:** Creating conducive conditions to increase cooperation and the formation of various organizations.
- **Regional Tourism Linkage Program:** Strengthening tourism development ties with neighboring countries and increasing cooperation with international partners.

Ensuring Service Excellence:

- **Service Quality Management Program:** Increasing the number of legally recognized service providers, strengthening star-grading, and preparing minimum standards.
- **Service Provider Empowerment Program:** Providing consultancy and encouraging the use of technology and modern systems to improve service delivery.

7.4 Monitoring and Evaluation System

An essential monitoring and evaluation system will be conducted to build an invincible, competitive, and sustainable tourism sector.

1. Short, medium, and long-term plans will be prepared, and their performance will be monitored by senior leadership.
2. An independent **Policy Implementation Unit** will be established under the Ministry. Additionally, the **Tourism Council** will monitor policy performance.
3. A **Digital Data Collection Method** will be prepared to monitor and control the implementation of programs.
4. Periodic monitoring will ensure programs are implemented correctly at Federal, Regional, and City Administration levels.
5. Performance of key result areas will be evaluated **every three years** through scientific study and stakeholder participation.
6. The policy will be amended when necessary based on policy impact studies and global/national experiences.

8. Other Related Development Policies

To implement tourism policy issues and strategic directions, other related development policies that provide support are presented as follows:

8.1 Economic Development Sectors and Infrastructure Policies

- **Agriculture and Rural Development Policy:** It is expected to produce quality agricultural products and supply them to tourism businesses consistently and at affordable prices. This brings economic growth by enhancing the linkage between tourism and agriculture. Furthermore, this policy must be able to integrate rural development with **rural tourism**.
- **Mining Policy:** It is expected to ensure the sustainable use of geo-heritage resources and link them with tourism (particularly **geotourism**).
- **Trade and Regional Integration Policy:** It is expected to issue business licenses to tourism enterprises efficiently and create a conducive working environment by establishing legal frameworks.
- **Transport and Logistics Policy:** It must expand tourism transport and ensure the creation of seamless domestic transport connectivity (e.g., land, air, rail, and water). Additionally, the policy is expected to establish and strengthen air transport links with countries from which visitors originate.
- **Energy Policy:** It is expected to provide the necessary electric power for tourism destinations and businesses.
- **Water Policy:** It ensures the fulfillment of potable water and sanitation infrastructure for tourism destinations.

8.2 Social and Human Resource Development Policies

- **Education and Training Policy:** It produces and supplies competent and competitive human resources for the tourism sector by providing practice-oriented training and education. It solves the sector's development bottlenecks and builds capacity by conducting and disseminating problem-solving research.
- **Health Policy:** It works on food safety and hygiene, the quality of health facilities providing services to tourists, and the encouragement of **Medical and Wellness Tourism**.

- **Culture Policy:** Identification, protection, and development of cultural heritage are expected from this policy.

8.3 Science, Innovation, and Technology Policy

- **Innovation and Technology Policy:** It is expected to introduce digitalization and innovation in the tourism sector, prepare necessary maps for tourism sites, strengthen destinations with technology, and modernize the tourism value chain.

8.4 Justice and Administration Policies

- **Public Service and Administration Policy:** It is expected to create the necessary organizational structure for government tourism institutions and design incentive systems or packages for employees.

9. Basic Definitions of Terms

- **Tourism:** A social and economic phenomenon created when visitors, individually or in groups, travel to various parts of the country outside their permanent residence for leisure, recreation, visiting relatives and friends, meetings, research, religious purposes, participating in events, or any other purpose, staying for not more than one year.
- **Visitor:** A person who travels to various parts of the country outside their permanent residence for recreation, visiting relatives/friends, meetings, research, religious purposes, participating in events, or any other purpose, staying for not more than one year.
- **Domestic Visitor:** A person residing in Ethiopia who travels to parts of the country outside their permanent residence for the purposes mentioned above, staying for not more than one year.
- **Foreign Visitor:** A person residing outside of Ethiopia who travels to various parts of the country for the purposes mentioned above, staying for not more than one year.
- **Visitor Service Institutions:** Businesses such as hotels, lodges, restaurants, motels, guest houses, tour operators, individual tour guides, tourism transport providers, and others engaged in the tourism value chain to provide services to visitors.
- **Tour Operator:** Organizations that design, coordinate, and promote various travel programs and tour packages to sell to foreign and domestic tourists.

- **Individual Tour Guide:** A professional individual who provides in-depth knowledge and interpretation of historical, cultural, and natural tourism destinations to visitors.
- **Tourism Marketing:** Activities performed to increase the benefits the country derives from the tourism sector by studying the needs of international and domestic visitors, organizing and analyzing information regarding attractions, destinations, products, and services, and conducting promotion and sales.
- **Historical and Cultural Heritage:** Any tangible or intangible result of human creativity from prehistoric and historic times that shows human development and possesses scientific, historical, religious, cultural, artistic, or craftsmanship value.
- **Natural Heritage:** Features capable of attracting visitors, including wildlife, flora, attractive landscapes, and geological formations.
- **Conservation:** Includes the care, repair, reconstruction, protection from damage, and preservation of natural, historical, and cultural heritage to ensure its continuity.
- **Museum:** A non-profit organization that serves the public by collecting, protecting, and repairing cultural and/or natural heritage, and by organizing collections for research, study, education, and entertainment.
- **Event/MICE Tourism:** A type of tourism based on **Meetings, Incentives, Conferences, and Exhibitions**.
- **Geo-heritage:** Geological and landscape heritage/attractions that require protection due to their value or significance.
- **Geotourism:** A type of tourism based on geo-heritage or geological and landscape attractions.
- **Geopark:** A protected area containing heritage of national/international geological value. It may also contain other natural, historical, and cultural heritages.
- **Stopover Tourism:** A type of tourism where transit passengers with extended layovers at Bole International Airport are enabled to visit Addis Ababa and other attractions.
- **Tourism Product:** Tangible and intangible historical, cultural, and natural resources, services, and activities that are priced and sold to visitors.
- **Multi-modal Transport System:** A system that enables visitors to access interconnected, efficient, and diverse transport service options.

- **Tourism Investment Zone:** An area identified through study for tourism sector investment and development.
- **Smart Tourism Destination:** A tourism destination organized with modern technological products that enhances visitor satisfaction.
- **Destination Development:** Includes adding value to tourism resources at a destination, developing tourism products, expanding infrastructure, expanding and improving service institutions, and caring for heritage.
- **Destination Management:** A system for sustainable destination administration through a comprehensive planning, development, and management framework that considers the needs and benefits of visitors, the local community, and tourism businesses.
- **Sustainable Tourism:** A type of tourism that takes full account of its current and future economic, cultural, and environmental impacts, addressing the needs of visitors, the community, and sector stakeholders.
- **Minimum Service Standard:** A standard describing the minimum quality of products and services that a service institution must provide to its customers.
- **Competency Certification:** A system where service providers entering the tourism sector are legally recognized to operate after verifying they meet the required criteria.
- **Value-for-money:** Payments made by customers that are commensurate with the product purchased and service received.
- **Trans-boundary Tourism Resource:** Refers to historical, cultural, and natural heritage found between Ethiopia and neighboring countries.
- **Stakeholder:** An entity that has a direct influence on the tourism sector or is influenced by the tourism sector.
- **Gender Expression:** In this policy, any expression in the masculine gender includes the feminine.

Ten-Year Tourism Sector Development Plan (2021–2030)

Ministry of Tourism

June 2020

Addis Ababa

Table of Contents

Introduction 5
1. Assessment of Sectoral Economic and Social Development Performance 7
1.1 Assessment of Heritage Conservation and Care Activities 7
1.2 Assessment of Wildlife Conservation and Development Performance 8
1.3 Assessment of Tourism Development Performance 14
1.4 Strengths, Weaknesses, Opportunities, and Threats (SWOT) 22
1.6 Customers/Stakeholders Needs and analysis 31
1.7 Strategic Stakeholder Analysis 36
2. Performance Gaps in Relation to Growth and Transformation Plan (GTP) 1 and 2 46
3. Challenges 49
4. Proposed Solutions 51
5. Essential Human and Material Resources for Sectoral Development 52
6. Ministry Of Tourism Mission, Vision, Values 54
7. Objectives 54
8. Strategic Pillars (or Strategic Focus Areas)/Thematic areas 55
9. Strategic Focus Areas, Goals, and Targets 58
10. Strategic Directions 80
11. Institutional Implementation Capacity, Policies, and Strategies 82
11.1 Prepared Policies, Strategies, Proclamations, and Operational Procedures 82
11.2 Policies, Strategies, and Operational Procedures 83
11.3 Technological Inputs and Organizational Changes 83
12. Financial Requirements 84
13. Performance Monitoring and Evaluation System 85
14. Sectoral Diplomacy and Strategic Partnership 86
Annexes 88
References 143

Abbreviation	Full Meaning
ATM	Arabian Travel Market
BIT	International Tourism Market (*Borsa Internazionale del Turismo*)
EU	European Union
FITUR	International Tourism Trade Fair in Madrid (*Feria Internacional de Turismo*)
GDP	Gross Domestic Product
GEF	Global Environment Forum
GIZ	*Gesellschaft für Internationale Zusammenarbeit* (German Corporation for International Cooperation)
HRD	Human Resource Development
IFC	International Finance Corporation
IGAD	Intergovernmental Authority for Development
IMTM	International Mediterranean Tourism Market
ITB	International Tourism Business (*Internationale Tourismus-Börse*)
KPI	Key Performance Indicator
KRA	Key Result Area
MDG	Millennium Development Goal

NEPAD	New Partnership for Africa's Development
PESTLE	Political, Economic, Social, Technological, Legal, and Environmental Analysis
SSA	Sport Satellite Account
SWOT	Strengths, Weaknesses, Opportunities, and Threats
SDG	Sustainable Development Goal
TSA	Tourism Satellite Account
UNDP	United Nations Development Programme
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNWTO	United Nations World Tourism Organization
USD	United States Dollar
WHO	World Health Organization
WIS	Workshop for Information Services
WTM	World Travel Market
WTTC	World Travel and Tourism Council

Introduction

Following the national reform introduced in 2018 (2011 E.C.), numerous economic and political transformations have taken place. Among these reforms, a primary focus has been the strategic direction set by the government to ensure the nation's prosperity. Accordingly, tourism has been designated as one of the priority economic sectors given special attention by the government. Based on national reform programs, significant changes to institutional structures have been implemented. While our country has registered rapid economic growth and social change across various fields over the past consecutive years, the tourism sector has contributed its own significant share to this national progress. However, it cannot be said that the observed growth is satisfactory relative to the country's vast tourism resources and development potential.

Although it was possible to execute multifaceted activities within the tourism sector during the two terms of the Growth and Transformation Plan (GTP), it remains a fact that despite Ethiopia's immense tourism assets and numerous opportunities it has not been possible to fully realize the sustainable economic, social, cultural, and ecological benefits of the sector. Therefore, it is essential to design a path that brings about radical change in the tourism sector, enabling the country to benefit in proportion to its vast resources. In view of this, under the previous organizational structure, the Ministry of Culture and Tourism had prepared and began implementing a ten-year plan starting from 2020/21 (2013 E.C.) aimed at bringing about political, economic, and social prosperity. However, based on the special priority given by the government to the tourism sector, and in accordance with Proclamation No. 1263/2021 (2014 E.C.) issued to determine the powers and duties of federal executive organs, the Ministry of Tourism was established as an independent institution.

Consequently, it became necessary to detach the ten-year plan of the tourism sector which was previously merged with the culture and sports sectors and establish it independently under the responsibility granted to the Ministry. Furthermore, at the time the ten-year plan was originally prepared, the Wildlife Conservation and Development Authority was not part of the tourism sector's organizational structure. Under the new restructuring, as the Wildlife Conservation Authority is now organized as an accountable organ to the Ministry of Tourism, it was found appropriate to integrate plans related to the protection, care, and development of wildlife and their

habitats with the tourism sector into a single sectoral plan. Accordingly, this ten-year lead development plan does not revise or change the core content of the previous three sectors' plans; rather, without altering the existing substance, it isolates issues specifically related to the tourism sector including heritage conservation and integrates them with wildlife conservation plans to present a unified sectoral plan.

The plan is organized into ten sections and attempts to indicate an analysis of the sector's current status, performance gaps, challenges, and proposed solutions, as well as an analysis of the human and material resources vital for the sector's development and its main focus areas. Furthermore, by revising the Ministry's vision, mission, and values, and by designing strategic focus areas, goals, and detailed objectives, the policies, strategies, and procedures necessary to implement the plan are presented in detail below.



1. Assessment of Sectoral Economic and Social Development Performance

This section reviews the current status and performance of various economic and social development activities carried out within the tourism development sector in our country over the past years. Accordingly, the results of the economic and social performance assessment reflecting the strengths and weaknesses observed during the last two Growth and Transformation Plan (GTP) periods, the challenges encountered, favorable conditions, best practices that served as sources of success, corrective measures taken, development plan focus areas, and international and regional realities are presented as follows:

1.1 Assessment of Heritage Conservation and Care Activities

During the previous Growth and Transformation periods, numerous activities were undertaken regarding heritage conservation and care. In the GTP II period, the plan aimed to register 5,595 immovable heritages; by the end of the planning period, 3,454 (61.7%) were registered. Additionally, out of a planned registration of 119,903 movable heritages, 90,117 (75.1%) were successfully registered. Regarding heritage maintenance, out of the planned 31,997 maintenance tasks, 34,505 (107%) were achieved, exceeding the target. However, given the vast variety and volume of heritage in our country and the high demand for restoration, extensive work is required over the next 10 years.

In the fields of paleontology, paleoanthropology, and archaeology, several new fossil discoveries have been made, and research that advances scientific knowledge in the field has been conducted. Significant work has also been done in repatriating heritages and preventing illegal heritage trafficking. For example, discussions were held with various institutions regarding the return of artifacts taken during the Battle of Magdala and at different times to the UK. A notable success is the return of Emperor Tewodros's hair from the UK after more than 150 years. This has created high motivation for future repatriation efforts. At the regional level, numerous heritages have been studied, and maintenance and care work have been performed.

Furthermore, under the 1972 International Convention, our country has managed to become the owner of nine international heritage sites that meet UNESCO criteria for their outstanding

universal value. Since signing the 2003 Convention for the Safeguarding of the Intangible Cultural Heritage in 2006, comprehensive identification, registration, and research of the intangible cultural heritages of nations and nationalities across the country have been underway. While the plan was to register 5 intangible heritages with UNESCO, 4 have been registered, ensuring international recognition for these cultural assets. During the last two GTP periods, in addition to the ten previously registered, two ancient manuscripts and other tangible and intangible heritages were documented and placed on the UNESCO Tentative List. However, because they were not registered as World Heritages to the extent planned, they will receive special focus in the upcoming planning periods. Although encouraging work has been planned and executed in the sector, the relationship between the Authority for Research and Conservation of Cultural Heritage (ARCCH) and the regions is not uniform or direct, making operations difficult; this requires focused attention in the future.

1.2 Assessment of Wildlife Conservation and Development Performance

Regarding Wildlife Potential and Ecosystem Services: Ethiopia's topography and climatic diversity are the primary reasons for its current ecological diversity and biodiversity concentration. Its natural blessings sky-scraping mountains, hilly terrains, grassy plains, valleys, rivers and lakes, wetlands, sandy plains, and dense forests integrated with wildlife resources—are breathtaking sights. These are distributed across all parts of the country.

Regarding the country’s wildlife potential, currently available data indicates that there are:

- 325 Mammal species
- 872 Bird species
- 240 Reptile species
- 71 Amphibian species
- 200 Fish species
- Over 6,500 Plant species

Among these, it has been confirmed that 57 mammals, 18 birds, 15 reptiles, 30 amphibians, and 41 fish species are endemic to Ethiopia. This demonstrates that Ethiopia possesses high wildlife diversity and a significant number of endemic species. If these wildlife biodiversity and

conservation areas are properly protected and developed following indigenous and modern conservation principles, they will contribute significantly to educational, scientific, social, cultural, economic, and ecological services for the community and the national economy.

Although the contribution of the wildlife sector to the country's economy and social benefits is high, the understanding among most policymakers and decision-makers in this regard has not grown as expected. However, beyond its ecological, scientific, and educational values, the wildlife development and conservation sector is one of the sectors that can contribute to national sustainable economic growth through improving community livelihoods, ensuring food security, generating income, creating various permanent and temporary jobs, tourism, trophy hunting, and other environment-focused investments.

Ethiopia is implementing both consumptive and non-consumptive wildlife utilization strategies. While multifaceted efforts are needed to increase utilization from its current level, data shows that direct income from the sector has been increasing over time. In the past four years, more than 496 million Birr in direct income was obtained from wildlife utilization, with an annual growth of at least ten percent. Notably, in some conservation areas, direct income for the community and the government has doubled. For instance, in the 2011 (E.C.) fiscal year, approximately 26,000 domestic and foreign tourists visited the Simien Mountains National Park, collecting up to 36 million Ethiopian Birr in direct revenue. From this, the local community earned up to 30 million Ethiopian Birr by providing various services (local guides, cooking, mule hiring, etc.) to tourists.

In terms of job creation, the wildlife sector has great potential to create direct and indirect opportunities for Ethiopians. Hunting safaris, lodges, hotels, and various service institutions developed by private investors and the local community within and around conservation areas not only create permanent jobs but also generate tax revenue for the government. Wildlife conservation areas contain diverse plant species that can be used sustainably. In this regard, these areas are the foundation for the protection of indigenous species, sources of traditional medicine, and the growth of biomedical research. Most Ethiopian communities, both rural and urban, use various plant species from natural environments for medicinal purposes. If this resource can be used properly and sustainably, it represents a major source of income and employment.

Therefore, if the ecosystems and biodiversity within these wildlife conservation areas are properly protected, they provide various ecological services. In 2015 (G.C.), an economic valuation study of ecosystem services was conducted by identifying the benefits provided by wildlife conservation areas managed at the Ethiopian Wildlife Development and Conservation Authority level (12 National Parks and 2 Wildlife Sanctuaries). The study confirmed that Ethiopia's wildlife conservation areas have high utility. At that time, the annual value of the ecosystem services of these conservation areas was estimated at 6.5 billion Birr. Additionally, the study showed that the amount of carbon stored in the vegetation alone (excluding soil carbon) within these areas is estimated to be worth up to 95 billion Birr (Table 1).

Table 1: Economic Valuation of Various Services of Conservation Areas in Birr

Wildlife Protected Areas Various Services)	**Total Annual Value in ETB**
For Animal Fodder/Grazing	1,148,929,129
Use of Natural Products	1,398,879,450
For Medicinal Purposes	271,986,997
Watershed Protection	2,752,315,916
Carbon Sequestration/Climate Regulation	89,966,913,441
Pollination and Pest Control Services	173,537,383
For Eco-tourism Service	25,187,916
Existence Value and Cultural Values	246,433,698
Total Annual Service Value in ETB	**95,984,183,930***

Wildlife and conservation areas in Ethiopia are assets of both national and international significance, possessing the characteristics of global heritage. Although the sector's contribution to the national economy over the past five years has not reached expected levels, extensive nationwide efforts have been made to ensure that the ecological, social, and economic benefits of these wildlife species and their habitats are properly utilized, thereby increasing community benefits.

In line with the second Growth and Transformation Plan (GTP II), the Ethiopian Wildlife Conservation Authority (EWCA) has been fulfilling its responsibility to achieve the national vision of seeing Ethiopia become a middle-income country by 2017 (E.C.). This is being pursued by sustainably developing and protecting wildlife and their habitats, expanding various types of utilization, and maximizing the sector's potential for building a climate-resilient green economy, with the aim of positioning Ethiopia among the top five African wildlife destinations.

To achieve this national vision and significantly increase the sector's economic contribution, a five-year strategic plan (2008–2012 E.C. / 2015–2020 G.C.) was developed and implemented. Through concerted efforts at various levels, encouraging results have been recorded in wildlife development, protection, and utilization. Among the key and strategic achievements recorded during the planning period, the following are noteworthy:

- Enhancing Community Participation and Benefit-Sharing: To increase awareness regarding the benefits of developing and protecting wildlife and their habitats, awareness-raising activities were conducted for 647,005 community members (including 167,112 women). Across all wildlife protected areas, 19,560 community members (5,939 women) were organized and strengthened into 130 associations engaged in ecotourism and non-ecotourism sectors, generating an income of 95.84 million Birr. Additionally, 97,019 individuals (27,728 women) benefited from permanent and temporary job opportunities. Furthermore, partnerships were strengthened with stakeholders at all levels, resulting in the collaborative execution of 198 distinct development and conservation activities.
- Law Enforcement: By creating 218 joint and 21 national mobilization forums involving stakeholders and community members, the sector improved legal compliance. Legal frameworks were prepared for 16 protected areas (7 of which were approved by the Council

of Ministers), and management plans were developed and implemented for 10 protected areas (including three under regional administration). Administrative advisory committees involving various segments of the community were established. In coordination with local stakeholders, 13,422 thousand person-hours of field patrols were conducted, leading to a 69% reduction in illegal activities within protected areas. Additionally, an agreement was reached between Ethiopia and Sudan to establish a transboundary management and control system between Alatash National Park and Dinder National Park.

- Expanding Protected Area Coverage: Research identified 3 new protected areas in the Benishangul-Gumuz Region, 7 in the Amhara Region, 1 in the Dire Dawa City Administration, and 2 in the Somali Region. Consequently, wildlife protected area coverage increased from 8% to 8.6%. Management and tourism development plans were prepared and are being implemented for eight protected areas (Kafta Shiraro, Alatash, Simien Mountains, Bale Mountains, Awash, Chebera Churchura, Borena Sayint, and Mago National Parks).
- Controlling Illegal Wildlife Trade: Monitoring was conducted at 14 new key transit points, increasing the coverage of illegal wildlife trade control outside of protected areas to 60%. Through 21 transboundary relationships with neighboring countries and international organizations, collaborative efforts were undertaken to prevent and control illegal trafficking. To enhance the capacity of justice and law enforcement bodies, awareness training was provided to 65,772 officers (8,390 women). Additionally, a sniffer dog program at Addis Ababa Bole International Airport is nearing completion. These efforts have yielded encouraging results in reducing illegal acts committed outside of protected areas.
- Strengthening Integrated Operations: In collaboration with regional governments, community members, and partners, several successful projects were completed. Notably, in the Simien Mountains National Park, residents of Gich village were successfully relocated to Debark town after the government approved and paid compensation, facilitated housing, and provided necessary infrastructure. By designing 10 alternative livelihood packages and securing partner support, 218 households (78 women) became beneficiaries of sustainable livelihoods. This reduced human pressure on the park, allowed its size to

expand from 136 sq. km to 412 sq. km, and ultimately led to the park's removal from the UNESCO List of World Heritage in Danger.

- Biodiversity Enrichment: Through conservation efforts involving stakeholders, the populations of endangered and endemic species such as the Walia Ibex, Gelada Baboon, and Swayne's Hartebeest increased by more than 6%. To restore degraded habitats, 11,377 hectares of invasive plant species were cleared in the Simien, Nechisar, Abijatta-Shalla, and Hallaydege-Asebot areas. Furthermore, indigenous seedlings were planted on 60 hectares of degraded land to protect the ecosystem and mitigate the effects of climate change.
- Partner Cooperation: To achieve development and conservation goals, support totaling 6,298,821.87 USD was secured from various partners (including KfW, GEF6, GIZ, FZS, PHE, SEDA, WI, AEWA, MIKE, AEF, AWF, UNESCO, EPI, Born Free, Border Point, etc.) since 2008 E.C. (2015 G.C.). Regular joint communication forums were established to bridge budget and resource gaps in protected areas.
- Infrastructure Development: Infrastructure projects included the design and permit for the head office, as well as the construction of 3 offices, 20 duplex residences for rangers, 140 km of new roads, and 49 permanent landmarks. Electricity was provided to 5 protected areas (Omo, Nechisar, Abijatta-Shalla, Awash, and Bale Mountains), and water services to 3 (Bale, Simien, and Nechisar). A boat dock was built at Lake Chamo, and 4 tourist centers were completed (Nechisar, Bale, Simien, and Abijatta-Shalla). Additionally, 147 km of firebreaks were created, and 1,605 km of internal roads were maintained via labor-intensive methods, increasing accessibility by 20% and improving the working environment.
- Wildlife Utilization and Market Expansion: Promotion was conducted through 55 international and national forums. By expanding markets and supporting tourism infrastructure, protected areas were made more tourist-friendly. Consequently, over the past five years, 503,030 domestic and foreign tourists visited the parks, generating over 496 million Birr from consumptive and non-consumptive wildlife use.
- Research and Development: An ecosystem monitoring system was established, and 155 studies were conducted using the capacity of local and foreign researchers, with 75 study results disseminated to users. A wildlife disease prevention strategy was drafted, and 19 disease surveys were conducted to monitor the health of wildlife. Medical services were

provided to species including the Ethiopian Wolf, Common Baboon, and Warthog, and biological samples were taken from hippos and pigeons for examination.

- Human-Wildlife Conflict Mitigation: Causes of conflict were identified through surveys in 12 protected areas. A mitigation strategy and a pre-prevention manual were prepared and distributed. By providing rapid responses to over 50 conflict-related requests, the damage caused by human-wildlife conflict was reduced by 65%.
- Capacity Building: To enhance execution and implementation capacity, short-term training was provided to 2,338 professionals and rangers (899 women), while 77 (28 women) received long-term education. Furthermore, the sector was equipped with modern research tools and technologies, network coverage was expanded, websites were developed, and internal operational manuals and guidelines were prepared.

1.3 Assessment of Tourism Development Performance

- Tourism is one of the sectors that holds a prominent share in the global economy. The sector plays a vital role in national economies by creating job opportunities and generating foreign currency. Recognizing its significance, governments worldwide have established plans and various agreements implemented at international, continental, and regional levels; Ethiopia is a party to several of these agreements and plans. Among the international agreements signed by our country is the United Nations 2030 Agenda, adopted in 2015, which serves as a roadmap containing Sustainable Development Goals (SDGs) to be implemented by member states. It is understood that all the SDGs within this document are linked to tourism, either directly or indirectly. For instance, Goal 1, "End Poverty," highlights tourism's role as one of the fastest-growing economic sectors, playing a significant part in accelerating economic growth and development, as well as increasing income through job creation at various levels.
- On the other hand, the African Union has approved the Tourism Action Plan for the continent, prepared and submitted through NEPAD (New Partnership for Africa's Development). This plan makes tourism one of the priority sectors for African governments, with the objective of making Africa a leading tourism destination in the 21st century. Similarly, Agenda 2063, formulated by the African Union, and the Sustainable

Tourism Master Plan prepared by IGAD, are designed to bolster tourism both continentally and within the East African region.

- According to a 2019 study by the World Travel & Tourism Council (WTTC), based on 185 countries and 25 regions, the sector accounts for 10.4% of the global Gross Domestic Product (GDP) and supports 319 million jobs, contributing 10% to total global employment. Furthermore, the report stated that tourism accounts for 6.5% of global exports, while domestic tourism represents 71.2% of total tourism revenue. Regarding its contribution to global GDP, the sector was valued at $8,811 billion in 2018 and was expected to grow by 3.6% to reach $9,126.7 billion in 2019.
- Ten-year forecasts for the sector indicate that tourism's contribution to GDP is expected to grow by 3.7% annually, reaching $13,085.7 billion or 11.5% of total global output by 2029. Similarly, the study noted that the world hosted 1,427,798,077 international tourists in 2018, generating $1,643.2 billion from international tourism. The number of international tourists is projected to grow by 4%, reaching 1,884,910,000 by 2025. The study also highlighted tourism performance by region; for example, the Asia-Pacific region showed exceptional performance in 2018 with a growth rate of 6.4%. In our continent, North African countries attracted attention by recording an 8.6% annual growth, indicating the potential for the sector to benefit Africa significantly. Additionally, the study pointed out that Ethiopia, Ecuador, Egypt, and Tunisia are among the countries where tourism's contribution to GDP has grown most rapidly.

Chart 1: Share of Global Tourist Flow



Global Share of Tourism by Continent

Regarding the continental situation, data indicates that in 2018, Africa attracted 62 million tourists and earned $39.2 billion, creating job opportunities for 9.1 million of the continent's citizens. Out of this total, Morocco and South Africa held the lion's share, attracting 10.5 million and 9 million tourists, respectively. Assessing the current growth trends, emerging reports indicate that the number of tourists and the resulting revenue for the continent will continue to increase in the coming years.

Regarding future growth prospects, it is estimated that by 2030, 57% of tourists will be those with interests in the music industry, cultural festivals, natural resources, and adventure tourism. It is further predicted that their primary destinations will be developing countries and new emerging markets entering the industry.

Looking ahead, while the impact of COVID-19 at the international level remains a factor, the Africa Tourism Plan 2030 predicts that the growth of tourists choosing Africa as a destination will increase significantly. This growth is expected to raise the continent's revenue from the current $39.2 billion to $262 billion. Data suggests that this amount would be six times greater than what

the continent currently earns from the export of manufactured goods. In light of this, countries such as Kenya, South Africa, Tanzania, Rwanda, Morocco, Egypt, Mauritius, and Botswana are leading the way and working hard to reap these benefits.

Following the national reform, the promising initiatives the Ethiopian government has been undertaking in connection with the sector suggest that a favorable foundation is being created. This will enable Ethiopia to improve upon its current 17th-place ranking in Africa and secure its rightful share of the continental tourism market.

Chart 2: Regarding International Tourism



When viewed through the lens of national legislation, most of the provisions enshrined in the Constitution of Ethiopia serve, in one way or another, as a foundation for the advancement of the tourism sector. This national document specifies that all Ethiopians should benefit from the country's prosperity without any discrimination. Based on this principle, it is possible to develop heritage sites, as well as historical and cultural attractions which are the fruits of the labor of our country's children to ensure they provide tangible economic benefits to citizens. Another key factor is the constitutional granting of the right to free movement, alongside the guaranteed right to own property; these have created a conducive environment for both domestic and international investors to participate in the country’s investment landscape. Furthermore, Articles 29, 39, 41, and 91 of the Constitution mandate the development and protection of the country's immense

cultural, historical, and natural wealth. The realization of these constitutional provisions is fundamental to the growth of the tourism sector, as Ethiopia's tourism attractions are directly or indirectly linked to these aforementioned resources.

Building upon this, the Ethiopian Tourism Development Policy was approved in 2009 (2001 E.C.) with the primary objectives of: leading the country's tourism industry through a broad-based development direction; developing existing and new tourism attractions and products in terms of variety, volume, and quality; expanding infrastructure and service institutions vital for the industry's growth; creating strong market linkages through promotion to remain competitive in the global tourism market; strengthening cooperative relationships among stakeholders in tourism development; and addressing the significant capacity limitations observed in the industry. Over the past 11 years, while numerous efforts have been made to implement these policy directions and strategies resulting in positive outcomes it is clear that much work remains that requires the concerted effort of all stakeholders. Consequently, it is both essential and timely to plan and execute remaining tasks in the coming periods, starting with policy revisions.

Regarding the performance of the sector under the two Growth and Transformation Plans (GTP I and II), various activities were attempted through the coordination of the government and stakeholders to bring about radical change and expand economic and social benefits. Key focus areas included tourism market development, increasing the type, volume, and standard of service institutions, enhancing education, training, and research within the sector, and strengthening implementation capacity. Although significant efforts led to good performance results in some strategic areas, substantial gaps were also observed. The low capacity and implementation efficiency of government institutions, private organizations, professional associations, and educational institutions involved in tourism development remain a primary challenge in bringing the sector to the desired level. This stems from a fundamental gap in overall tourism organization, coordination, and institutional capacity.

Our country is home to a vast array of historical, cultural, and natural attractions and has successfully registered numerous heritages with UNESCO. This has undoubtedly raised our country’s competitive standing in the sector. However, the fact that these attractions have not been adequately protected, developed, or utilized to their full potential as domestic and international

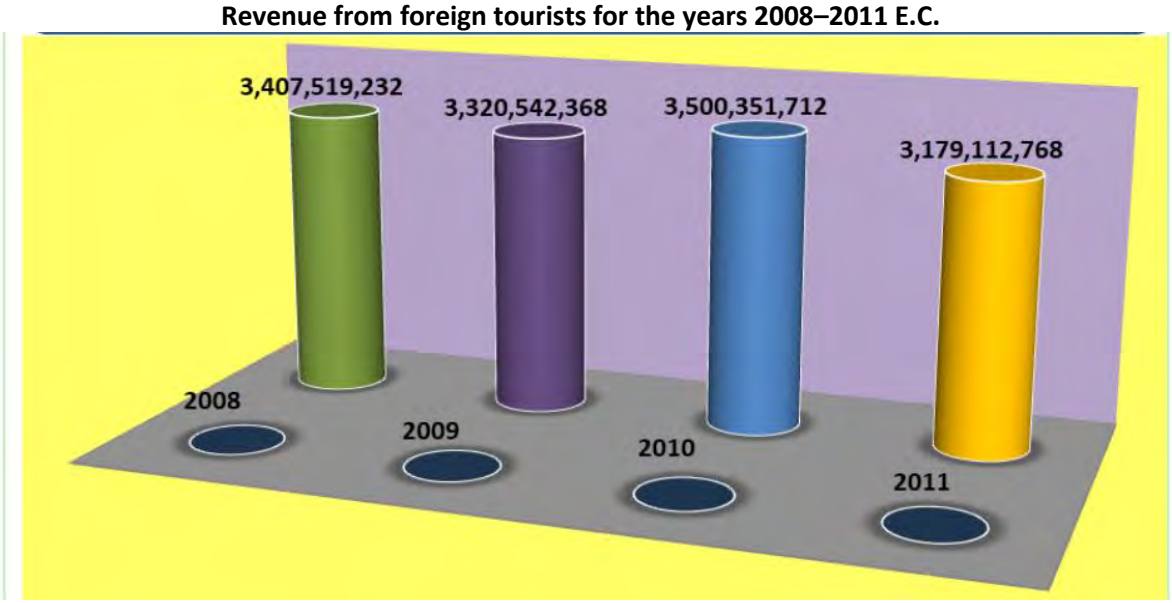
tourist draws has meant that Ethiopia's standing in developing existing and attractive destinations remains low compared to our competitors.

During past planning periods, various efforts were made to develop the tourism market and increase competitiveness by promoting our resources. Specifically, tourism marketing was carried out at renowned international trade fairs such as ITB Berlin (Germany), WTM London (UK), BIT Milan (Italy), IMTM Tel Aviv (Israel), FITUR Madrid (Spain), and ATM Dubai. However, in terms of the level of participation, the work remains limited when compared to competing neighboring countries and our actual potential. Therefore, future marketing work must be conducted in a coordinated, planned, and organized manner in partnership with our overseas missions and partners to ensure we are competitive. In this regard, it is vital to coordinate the private sector and other relevant bodies to perform integrated market development and promotional work. The private sector's leading role has been crucial in the past, and a broader, more integrated approach will be mandatory moving forward.

On the other hand, significant activities have been undertaken to expand tourism investment, diversify the types and volume of tourist services, and enhance service quality. To support the sector and accommodate increasing tourist numbers, various investment incentives have been implemented. An international hotel grading system was introduced, resulting in the creation of 353 graded hotels, 70 lodges, 300 restaurants, and thousands of other service providers. Additionally, there are 600 legally recognized tour operators. These institutions, collectively and individually, have played a major role in the increase of visitors to our country.

Since tourism received official government recognition in Ethiopia in 1965 (1957 E.C.), it has served as a bridge for social and economic development. The industry has demonstrated success in job creation, foreign currency earnings, and contribution to the overall GDP, particularly during the last two GTP periods. High growth in tourist numbers was recorded during GTP II; for instance, a flow of 910,128 tourists was recorded in 2017/18 (2010 E.C.), and the revenue generated in 2018/19 (2011 E.C.) reached 3,179,112,768.00 USD. Parallel to this, it was confirmed that the number of domestic tourists reached 23,669,258. The chart provided below illustrates the foreign currency earnings our country has gained from the sector.

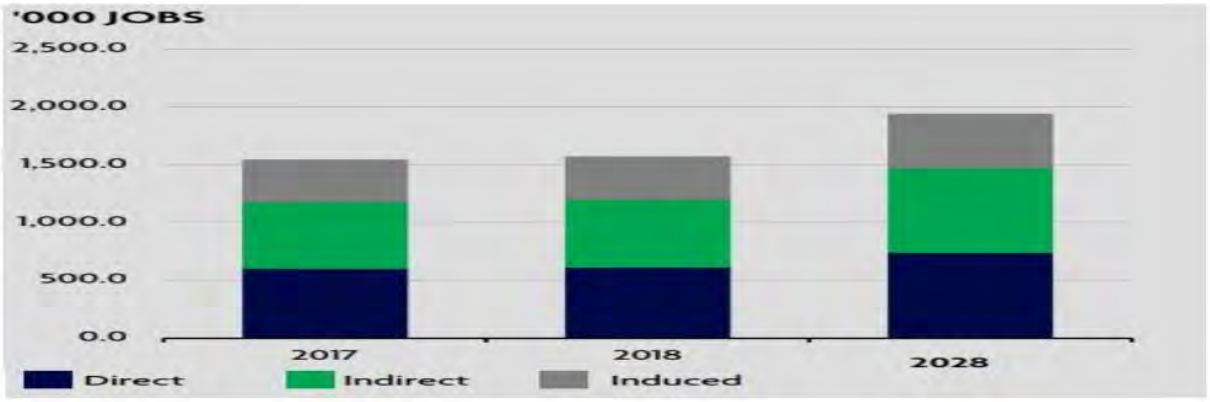
Chart 3: Revenue Generated from Tourists



Regarding human resource capacity building, although efforts have been made to produce a skilled workforce for the tourism sector, significant gaps have been observed due to the mismatch between labor demand and supply, as well as structural challenges. In this regard, a survey conducted by the Catering and Tourism Training Institute (CTTI) in 2015 indicated that only **23%** of the workforce employed in the hotel and tourism sector was professionally trained. Furthermore, a 2011 (E.C.) survey conducted by the institute focusing on star-rated hotels and tour operators revealed that only **32.9%** had received formal training. Generally, although the number of higher education institutions providing tourism and hotel management education has grown from 3 to 10 over the last decade, a vast gap between demand and supply remains, necessitating focused efforts in the coming years.

During the previous planning years, efforts were made to ensure community participation and benefit-sharing, particularly through job creation. According to a 2018 report by the World Travel and Tourism Council (WTTC) assessing country rankings, our country's tourism sector had created direct employment for **1.5 million citizens** by 2018. When compared to job creation in other sectors, it has been confirmed that tourism accounts for **8.3%** of total employment.

Chart 4: Number of Citizens for Whom Job Opportunities Were Created



Source: **(UNWTO,2018).** *Compendium of Tourism Statistics Data 2012–201*

Similarly, the sector's contribution to the overall national economy is on the rise. According to the aforementioned report, the sector contributed 6.1% to the GDP, which represents a 1% increase over the target set in the second Growth and Transformation Plan (GTP II).

It is evident that the expansion of tourism infrastructure and Information and Communication Technology (ICT) serves as the foundation for the growth of the tourism sector. In this regard, while the expansion of road infrastructure and airports in our country is commendable, our performance remains low when compared to our competitors, necessitating better efforts in the future. For instance, in terms of road infrastructure, we rank 127th globally. In the communication sector, specifically regarding internet service delivery, data shows that we rank 137th in the world. In the 21st century often referred to as the age of information and knowledge utilizing international information networks is absolutely essential. Therefore, if our country is to remain competitive in the sector, extensive work must be done in this area in the coming years.

As is well known, our country is blessed with natural riches. However, we have not traveled far in terms of conserving these natural resources, ensuring sustainable tourism, and making the community the primary beneficiaries. In terms of competitiveness regarding natural resources, our country ranks 33rd out of 140 countries globally. This indicates that significant work awaits us to further enhance our competitive edge.

Regarding the coordination and integration of actors within the tourism sector, the industry is by nature a sector that can greatly stimulate the economy through its backward and forward value chain linkages, as well as its horizontal integration with sectors such as agriculture, mining, environmental protection, transport, and construction. This potential can only be realized when the government, the private sector, non-governmental organizations, and academic institutions create a seamless partnership. To facilitate this and lead the tourism industry through streamlined stakeholder relations and integrated joint planning, a National Tourism Transformation Council was established. However, due to various reasons, this council was not effective and was disbanded before making significant progress. Consequently, the coordination among sector actors has remained ineffective. Therefore, in the future, extensive work must be done in a planned and organized manner to create and strengthen the linkages between the various players in the sector.

1.4 Strengths, Weaknesses, Opportunities, and Threats (SWOT)

Strength	Weakness
• **Policy Implementation:** A tourism policy has been formulated and is currently being implemented. • **Stakeholder Engagement:** Strengthening the linkages and collaboration with stakeholders and partner organizations. • **Infrastructure Development:** Providing support for the expansion and development of tourism infrastructure. • **Heritage Recognition:** Achieving significant success in registering both tangible and intangible heritages as World Heritage sites. • **Institutional Coordination:** Improving the communication and coordination systems among institutions at the federal, regional, zonal, and district (woreda) levels, and	**Challenges and Institutional Limitations** • **Capacity Constraints:** Limited institutional capacity for both execution and enforcement. • **Resource Management:** Weak handling, utilization, and protection of tourism attraction resources. • **Service Quality:** Lack of competitiveness in the quality of services provided within the sector. • **Infrastructure Gaps:** Insufficient expansion of tourism and basic infrastructure. • **Structural Inconsistency:** Lack of a uniform organizational structure across the sector, from the federal level down to the lowest administrative tiers.

establishing standardized operating procedures. • **Wildlife Conservation:** Increasing the coverage and ecological representation of wildlife conservation areas across the country. • **Legal Protection:** Ensuring that most conservation areas have their boundaries respected and have been granted legal personality/status. • **Capacity Building:** Creating opportunities for both short-term and long-term human resource training. • **Ranger Training:** Providing continuous para-military training for park rangers. • **Community Involvement:** Initiating efforts and seeing positive results regarding the involvement and benefit-sharing of local communities in certain conservation areas.	• **Community Benefit:** Low level of community involvement and benefit-sharing within the tourism sector. • **Investment Climate:** Failure to create a balanced and conducive investment environment across all regions of the country. • **Technology Adoption:** Weak utilization of technology within the sector. • **Legal Framework:** Existence of gaps in the legal and regulatory frameworks. • **Data Management:** Weak systems for information and data handling. • **Private Sector Participation:** Low involvement of the private sector in the industry. • **Global Competitiveness:** Limited capacity to compete at both continental and international levels. • **Employment Generation:** Failure to create job opportunities commensurate with the sector's potential. • **Marketing and Promotion:** Weakness in marketing and promotional activities for the sector. • **Economic Contribution:** The sector's low share and contribution to the National Product (GDP). • **Regulatory Compliance:** Failure to correctly and properly implement

	established directives and operating procedures. **Wildlife Conservation Areas:** **Substandard Conservation Areas:** Wildlife conservation areas (specifically national parks, sanctuaries, hunting blocks, and community conservation areas) are not properly protected or developed; they fail to provide necessary services or satisfy the needs of all types of tourists. • **Outdated Legal Frameworks:** Existing legal frameworks do not take current realities into account and have become modern-day bottlenecks; furthermore, there is a failure to properly implement even the existing laws. • **Sustainable Financing:** Lack of a sustainable financial system (such as a Trust Fund) to support conservation and development efforts. • **Community Development:** Insufficient work on destination development, job creation, and livelihood improvement programs that would increase the participation and benefit of local communities. • **Risk Management:** Lack of an integrated early prevention system for risks facing wildlife conservation areas (such as fire,

	disease outbreaks, and cross-border security disruptions). • **Market Systems:** Absence of a market expansion system for wildlife tourism that is based on the value chain. • **Diversification of Use:** Limited efforts in developing and expanding different types of wildlife utilization/tourism products. • **Resource Scarcity:** Significant resource limitations hindering the proper development of protected areas.

Opportunities	**Threat**
• **Political Commitment:** Significant growth in the government's attention and priority given to the tourism sector. • **Natural and Cultural Wealth:** Possession of immense natural beauty, a proud history, and a diverse multicultural heritage. • **Diplomatic Hub:** Addis Ababa's status as the headquarters of the African Union and numerous international organizations (Diplomatic Tourism). • **Capacity Building Institutions:** The expansion of educational institutions capable of producing a trained and skilled workforce for the sector. • **Global Hospitality Brands:** The increasing presence and expansion of international brand-name hotels.	• **Institutional Instability:** Frequent changes and restructuring of the sector's leadership and organizational setup. • **Regional Instability:** Political instability and the threat of terrorism in the East African region. • **Internal Security:** Domestic political instability and unrest. • **Cultural Erosion:** The impact of global cultural influence and the erosion of national cultural values. • **Climate Change:** The adverse effects and growing impact of global climate change. • **Conflicting Development:** National development projects being carried out without considering the preservation of tourism and natural resources.

• **Infrastructure Expansion:** Continued growth and expansion of general transport infrastructure. • **Regulatory Readiness:** The government's readiness and commitment to revising the legal frameworks governing the wildlife sector. • **Accessibility:** The development of infrastructure networks making most conservation and protected areas more accessible. • **World-Class Aviation:** The existence of a globally competitive and strong national airline (Ethiopian Airlines). • **Partnerships:** Strong collaborations with stakeholders and international partner organizations. • **Environmental Synergy:** The immense potential of protected areas to provide ecological services in alignment with the national Green Development Strategy. • **International Alignment:** Ethiopia being a signatory to various international agreements and protocols. • **Media Support:** The expansion and increased focus of national public, private, and mass media institutions in supporting the sector and advocating for wildlife conservation.	• **Demographic Pressure:** Rapid population growth and the expansion of unemployment. • **Financial Crimes:** The increase in illegal money laundering and illicit financial flows within the sector. • **Coordination Gaps:** Difficulties in managing and leading the sector through an integrated approach. • **Economic Volatility:** Economic instability and price inflation. • **Infrastructure Deficits:** Persistent challenges regarding the lack of infrastructure expansion. • **Illegal Wildlife Trade:** The expansion of the international black market for wildlife products, which has become increasingly lucrative and exerts extreme pressure on key wildlife species. • **Public Health Risks:** The prevalence of communicable diseases (such as COVID-19) at both national and global levels. • **Overgrazing:** An imbalance between available grazing land and the increasing number of domestic livestock around protected areas. • **Human-Wildlife Conflict:** Growing pressure on natural resources due to population increases around protected areas, leading to rising conflict between humans and wildlife. • **Stakeholder Commitment:** A lack of commitment from key stakeholders to resolve the fundamental problems facing protected areas.

Factors/situations/conditions	Favorable circumstances	Threats
1.Political Conditions/Situations	• **Economic Priority:** The sector is being recognized and treated by the government as one of the fundamental pillars of the national economy. • **Social Cohesion:** Government bodies view the sector as a primary tool for fostering national unity, tolerance, and reconciliation. • **Policy Clarity:** The formulation of numerous sectoral policies and strategies has provided a clear national direction for implementation. • **National Philosophy:** The government's adoption of the new "Reform" or "Medemer" (synergy) philosophy, which focuses on strengthening national unity. • **Regional Diplomacy:** The creation of positive and favorable relations with neighboring countries...	• **Regional Instability:** The lack of reliable peace and stability within the East African region. • **Political Polarization:** The underdeveloped culture of dialogue and rapprochement among domestic political actors, which serves as a root cause for conflict and the absence of peace.
2.Economic Conditions/situations	• **Market Economy:** The existence of a free-market economic system and the creation of favorable conditions for the sector.	• **Macroeconomic Imbalance:** The existence of macroeconomic instability (e.g., inflation, foreign exchange shortages).

	• **Economic Potential:** The sector's immense capacity to serve as a major source of national economic growth. • **Fiscal Support:** The consistent annual increase in the government budget allocated to the sector. • **Resource Mobilization:** The presence of broad opportunities to mobilize resources for sectoral development from various diverse sources. • **Human Capital and Market Access:** The availability of a large labor force and extensive market opportunities. • **Job Creation:** The significant potential of the sector to generate large-scale employment opportunities. • **Nation Branding:** The immense potential of the sector to build and enhance the country's global image.	• **Inadequate Incentives:** Lack of an established incentive system sufficient to expand the cultural tourism and sports industries. • **Resource Scarcity:** A shortage of adequate financial resources dedicated to the development of the sector. • **Low Private Investment:** The small number of private investors currently investing in the sector. • **Rising Competition:** The increasing intensity of economic competition over time (both regionally and globally).
3.Social conditions/Situations	• **Diversity:** Ethiopia's status as a multinational and multicultural nation. • **Social Cohesion:** The long-standing traditional values and social	• **Erosion of Values:** The erosion of positive cultural values that serve as the foundation of social cohesion, particularly in connection

	bondings of the people, which play a positive role in bringing communities closer together. • **Ethical Foundations:** The existence of religious and traditional foundations that preach mutual understanding, support, and the strengthening of good relationships. • **Regional Connectivity:** The extensive cultural linkages and shared heritage with the peoples of neighboring countries.	with rising regionalism (ethnic-centrism). • **Underutilization of Heritage:** The failure to identify and effectively utilize beneficial, long-standing social interactions and traditional systems for modern development.
4.Technological Conditions	• **Digital Transformation:** The expansion of modern information exchange technology and the continuous growth of its accessibility and utilization. • **Scientific Advancement:** The existence of progress in science and technology that has a direct linkage to the development of the tourism sector.	• **Capacity Gaps:** Limited financial resources, knowledge, and technical skills required to effectively utilize modern technological outputs. • **Reduced Physical Activity:** The limitation of physical movement/activity (likely referring to the sedentary nature of technology use or the impact of automation on traditional labor).
5.Environmental Conditions	• **Climatic and Topographic Diversity:**	• **Ecological Imbalance:** The environmental

	The country's possession of diverse climatic zones and varied landscapes, which significantly contributes to the growth of the tourism sector. • **Green Development Strategy:** Ethiopia's adoption of a Green Development Strategy, which creates favorable conditions for long-term climate sustainability and environmental resilience	disruption caused by the negative impacts of both man-made and natural phenomena, which exerts significant pressure on the sector. • **Climate Change and El Niño:** The global phenomenon of climate change and the specific impact of **El Niño**, which creates environmental strain and challenges within our country.
6.legal conditions	• **Comprehensive Legal Frameworks:** The existence of national, continental, and international legal frameworks surrounding the cultural, tourism, and sports development sectors. • **International Cooperation:** The presence of international collaborations and partnerships that provide critical support for the development of the sector	• **Awareness and Perspective Gaps:** The existence of gaps in mindset and a lack of awareness regarding the established legal frameworks of the sector. • **Legislative Delays:** The excessive amount of time it takes to draft, approve, and issue the proclamations and regulations necessary for the sector's development.

1.6 Customers/Stakeholders Needs and analysis

No.	Customers/	What they expect from the Institution (Products/Services)	What the Institution expects from them	Potential Impact if expectations are not met
1	**The People of Ethiopia**	• Equal study, protection, development, and promotion of cultural, historical, and natural heritages. • Participation and benefit-sharing in the sector's development. • Efficient and quality service. • Access to information. • Clear policies, strategies, and laws that are properly implemented.	• Information. • Active participation and cooperation. • Sense of ownership. • Respect for law and order. • Development-oriented mindset. • Embracing diversity. • Tourism ethics.	• Loss of credibility/trust. • Disruption of development activities. • Failure to achieve mission and vision. • Public protest/opposition. • Neglect/destruction of heritage sites. • Disregard for law and order.
2	**Domestic and Foreign Tourists**	• Up-to-date, complete, and technology-assisted information. • High-quality, standardized services. • Services proportional to the price paid (Value for money). • Safety and security. • Developed and well-preserved heritage sites.	• Compliance with the laws of the country. • Respect for cultural, natural, and historical heritages. • Respect for the local community and culture. • Proper payment for services received.	• Damage to the country's image. • Decrease in tourist flow and revenue. • Failure to achieve mission and vision.

			• Tourism ethics.	
3	**Service Providers (Industry Operators)**	• Professional licensing. • Professional/technical support. • Efficient and quality service. • Modern, technology-assisted information services. • Service grading and certification.	• Legality and compliance. • Provision of efficient and standardized services. • Timely payment for services received from the institution.	• Failure to achieve mission and vision. • Decline in tourist flow and revenue. • Substandard service delivery. • Damage to the country's image. • Decrease in private investment in the sector.
No.	**Customers**	What they expect from the Institution (Products/Services)	What the Institution expects from them	Potential Impact if expectations are not met
(3 cont.)	**Investors / Operators**	• Promotion and marketing of their services. • Incentives and encouragement. • Nation branding (promoting the country with a unique identity). • Developed tourist attractions. • Clear policies, strategies, and regulations that are effectively implemented.	• Clear project proposals. • Professional ethics. • Environmental Impact Assessments (EIA). • Adherence to tourism ethics.	(Refer to previous table for impact section)
4	**Heritage Custodians / Holders**	• Registration and study of heritages. • Maintenance and conservation of heritages.	• Providing information. • Active participation and cooperation.	• Damage to and looting of heritages. • Loss of trust.

		• Heritage development and sustainable utilization. • Professional and financial support. • Heritage promotion. • Collaborative work systems. • Modern, technology-assisted information. • Clear policy and regulatory frameworks.	• Protecting heritage without altering original content/identity. • Respect for law and order. • Development-oriented mindset. • Registration of heritages. • Loyalty and national sentiment. • Making heritages accessible. • Adherence to tourism ethics.	• Decline in the number of researchers and visitors. • Reduced accessibility of heritage sites. • Lack of integrated/coordinated systems.
5	**Sector Associations, Clubs, and Professionals**	• Access to information. • Professional licensing and renewals. • Support and monitoring. • Capacity building. • Working in coordination/partnership. • Recognition and incentives.	• Functional bylaws/governance. • Support for sectoral development. • Operating legally. • Development-oriented mindset. • Creating awareness and mobilization. • Expanding domestic tourism.	• Loss of auxiliary development forces. • Slowing down the pace of sectoral development. • Decrease in domestic tourism flow. • Increase in illegal/unregulated activities. • Decline in handicrafts and performing arts.
No.	**Customers**	What they expect from the Institution (Products/Services)	What the Institution expects from them	Potential Impact if expectations are not met
(5 cont.)	**Associations / Professionals**	• Expansion of their membership base. • Active image-building activities.	• Development-oriented mindset. • Growth at the desired pace.	• Lack of development-oriented thinking.

		• Adherence to tourism ethics. • Strong professional organizational structures with active member participation.		• Stagnation of sectoral growth.
6	**Researchers and Scholars**	• Complete, up-to-date, and technology-assisted information. • Licensing and renewals. • Support and cooperation. • Efficient service. • Laboratory services. • Access to specific study sites.	• Research and study proposals. • Payment for services and research fees. • Submission of study results and findings. • Respect for law and order. • Knowledge transfer. • Professional ethics. • Capacity building / training opportunities. • Adherence to tourism ethics.	• Loss of scientific research findings. • Loss of foreign currency. • Damage to the country's image. • Lack of recognition for natural and cultural heritages. • Lack of knowledge transfer. • Inability to make data-driven decisions. • Knowledge and information gaps.

7	**Sector Trainees (Students)**	• Standardized training. • Legal educational credentials (certification). • Efficient service. • Fair recruitment systems. • Strong links and cooperation with service providers. • Advisory/Counseling services. • Competency assessment (COC). • Increased admission capacity. • Additional training fields/disciplines.	• Good ethical conduct. • Fulfillment of necessary criteria/requirements. • Diligence. • Competitiveness.	• Limited implementation capacity. • Absence of standardized services. • Shortage of trained manpower in the sector. • Inability to be competitive in the sector.

1.7 Strategic Stakeholder Analysis

No.	Stakeholders	What they expect from the Institution (Products/Services)	What the Institution expects from them	Potential Impact/Threat if expectations are not met
1	**House of Peoples' Representatives, House of Federation, and Council of Ministers**	• Equal development of all nations, nationalities, and peoples' cultural heritages. • Ensuring equitable benefits for all ethnic groups. • Significant contribution to the National GDP based on the Ministry's mandate. • Access to information. • Strategic plans and performance reports.	• Approval of Proclamations, Regulations, and Budgets. • Frameworks for support and cooperation. • Integrated work systems.	• The sector could be deemed irrelevant for development. • Severance of cooperation or, in extreme cases, the total dissolution/closure of the institution.
2	**Ministry of Foreign Affairs**	• Integrated/Coordinated operations. • Up-to-date and timely information.	• Collaborative action. • Nation branding and image building. • Expansion of foreign investment in tourism. • Signing of Memorandums of Understanding (MoUs).	• Decline in tourist arrivals. • Reduction in tourism revenue. • Weakening of cultural diplomacy/cooperation. • Failure in nation-branding efforts.

3	**Media Outlets (Mass Media)**	• Well-organized information/data. • Coordinated operations. • Proportional payment for their media services.	• Broadcasting programs that build public awareness of the sector. • Establishing permanent segments/programs for tourism. • Collaborative action and airtime allocation. • Signing of MoUs.	• Low public awareness of the sector's importance. • Stagnation of sectoral development. • Decrease in tourist numbers.
4	**Religious Institutions**	• Development, protection, and promotion of religious heritage for visitation and benefit. • Capacity building and training. • Expansion of infrastructure at religious sites. • Facilitation of their needs. • Respect for their religious protocols/tenets.	• Opening their sites/attractions to tourists. • Hospitality toward guests. • Proper conservation of their artifacts/sites. • Exchange of information. • Active participation in development through funding, labor, and knowledge. • Signing of Memorandums of Understanding (MoUs).	• Damage/deterioration of heritage sites. • Tarnishing of the national image. • Loss of revenue. • Creation of distorted or weak public perceptions. *(Refer to previous table for impact section)*
5	**Ministry of Finance and Financial Institutions**	• Timely performance reports. • Proper and frugal utilization of resources.	• Provision of financial resources (budgeting). • Loan services.	• Inadequate budget allocation. • Failure to provide efficient foreign exchange services.

		• Timely budget requests and transfers. • Adherence to financial laws, regulations, and program-based budgeting.	• Foreign exchange (Forex) services. • Guarantee services. • Fair, transparent, and accountable service delivery. • Signing of MoUs.	
6	**Investment Commission**	• Monitoring of investors within the sector. • Operational monitoring reports.	• Creating a favorable environment for sector investors. • Establishing specialized land and financial arrangements. • Integrated work systems and information exchange. • Signing of MoUs.	• Delay in land provision and other essential services. • Damage to the sector's image due to lack of efficient/transparent systems. • Failure to expand service-providing institutions.
7	**Ministry of Transport**	• Identifying legal tour operation companies. • Integrated information exchange and operations. • Master plans for roads leading to attraction sites. • Identifying transport types suitable for the sector.	• Ensuring investors in the sector provide efficient and fair services. • Information exchange. • Competency certification for tourist vehicles. • Expansion of transport infrastructure near attractions. • Signing of MoUs.	• Reduced accessibility of tourist sites. • Disruption of tourist flows. • Reduction in revenue. • Disruption of promotional activities conducted via airlines.

8	**Ministry of Trade**	• Identifying legal tour operation companies. • Regulation of service-providing institutions. • Request for coordinated operations. • Competency certification. • Standardization of sector service-providing institutions.	• Information exchange. • Issuance and renewal of business licenses. • Signing of Memorandums of Understanding (MoUs).	• Failure to expand service-providing institutions. (Refer to previous table for impact section)
9	**Ministry of Education / Institutions**	• Integrated work systems. • Information exchange. • Practical internship opportunities for trainees. • Service fees for trainees. Assessment/Evaluation tools. • Library/Reading services for students.	• Conducting research and studies. • Designing curriculum for tourism training fields. • Assistance in expanding domestic tourism. • Producing trained human resources for the sector. • Integrated operations. • Building a strong reading culture among students. • Signing of MoUs.	• Failure to produce the required quantity and quality of human resources. • Minimal research output to support sectoral development.
10	**Civil Service Ministry**	• Information.	• Provision of training.	• Inability to access proper training.

		• Implementation of proclamations, regulations, and directives. • Application of reform programs. • Training needs identification.	• Conducting job grading and evaluation. • Drafting or revising necessary proclamations, regulations, and directives. • Signing of MoUs.	• Failure to acquire necessary human resources. • Failure to implement reform initiatives.
11	**Development Partners**	• Sufficient and accurate information. • Collaborative operations. • Problem-solving research and studies. • Strengthened protection of international heritage sites. • Access to policies and strategies. • Project proposals. • Performance reports.	• Financial and material support for submitted projects. • Assistance in nation-branding/image building. • Collaborative and integrated work. • Information exchange. • Capacity building and professional support. • Signing of MoUs.	• Loss of additional resource/funding sources. • Negative impact on nation-branding efforts.

12	**Ministry of Innovation & Technology**	• Information exchange. • Integrated operations. • Up-to-date information.	• New ICT (Information Communication Technology) products and solutions. • Establishing digital operating systems. • Providing telephone and internet services around attraction sites. • Protection of Copyright and Related Rights. • Professional technical support. • Signing of MoUs.	• Information/Digital gaps. • Weak marketing and promotional activities. • Low customer satisfaction. • Lack of efficient operations.
13	**Ministry of Science & Higher Education**	• Collaborative work. • Information exchange.	• Biosphere Reserve management. • Strengthening University-Industry linkages. • Establishing library and archive reading shelves in higher education institutions.	• Violation of ownership rights. • Low performance in Biosphere Reserve management. • Weak University-Industry linkages.
14	**Ministry of Revenues (Customs)**	• Information. • Adherence to laws, regulations, and directives. • Integrated operations.	• Proper implementation of incentive directives for sector institutions. • Providing training for Customs professionals. • Integrated information exchange. • Controlling items imported or exported by tourists. • Signing of MoUs.	• Easy looting/trafficking of heritage assets. • Disruption of tourism service providers' operations.

15	**Justice Organs (Police, Courts, etc.)**	• Organized and up-to-date information. • Awareness-building training on the sector. • Integrated operations.	• Preventing illegal acts committed against heritage sites and attractions. • Ensuring the safety and security of tourists. • Enforcing ownership rights for creative/innovative works. • Signing of MoUs.	• Looting and destruction of attractions and heritages. • Increased harassment or inconvenience of tourists. • Violation of intellectual property rights for artistic works.
16	**Natural Resources Protection Commission**	• Information exchange. • Expansion of Ecotourism. • Collaborative work.	• Information exchange. • Integrated development and conservation work. • Environmental Impact Assessment (EIA). • Climate change adaptation programs. • Signing of MoUs.	• Delay in the development of attractions. • Reduction in revenue. • Potential damage to heritage sites.
17	**Ministry of Health**	• Collaborative work. • Information exchange.	• Prevention and precaution activities for pandemics (e.g., COVID-19). • Joint efforts to prevent HIV/AIDS. • Joint monitoring and control of sanitation in service-providing institutions. • Fast and efficient medical services. • Signing of MoUs.	• Severe damage to the sector from pandemics. • Weakened capacity to fight harmful traditional practices. • Low HIV awareness. • Poor sanitation in tourism service institutions.

18	**Ministry of Agriculture**	• Collaborative work. • Expansion of Agrotourism (Agricultural Tourism). • Rural development tourism.	• Information exchange. • Raising community awareness. • Signing of MoUs.	• Slower agricultural development. • Reduction in revenue. • Damage to attractions and their access points.
19	**Ministry of Labor and Social Affairs**	• Collaborative work. • Information exchange.	• Job creation. • Trained/Skilled human resources.	• Limited international job opportunities. • Low wage levels/compensation.
20	**Ministry of Defense**	• Collaborative work. • Information exchange.	• Protection of wildlife and their habitats/shelters.	• Poor protection of wildlife and protected areas.
21	**Ministry of Construction and Urban Development**	• Strengthened information exchange and joint operations. • Tourism Master Plan.	• Utilizing the Tourism Master Plan for sector-related constructions. • Proper land allocation and zoning for tourism.	• Destruction of heritage sites. • Lowering of service delivery standards.
22	**Ministry of Peace**	• Coordinated operations. • Information exchange. • Signing of MoUs.	• Preventing illegal heritage trafficking. • Preventing illegal trade of wildlife and wildlife products. • Training for Tourist Police.	• Expansion of illegal heritage trafficking. • Rise in illegal wildlife trade. • Lack of specialized Tourist Police training.
23	**Ministry of Mines**	• Coordinated operations. • Information exchange.	• Heritage rescue/salvage operations during mining. • Care for wildlife conservation areas.	• Physical damage to heritage sites. • Weak wildlife protection. • Destruction of attraction sites and destinations.

			• Handicraft industry and tourism development.	
24	**National Intelligence and Security Service (NISS)**	• Detailed information. • Integrated work systems.	• Reliable national tourist data/intelligence. • Ensuring the safety and security of tourists and researchers. • Signing of MoUs.	• Lack of reliable security information. • Tourists facing safety threats. • Vulnerability of heritage sites to looting.
25	**Ministry of Water, Irrigation, and Energy**	• Coordinated operations. • Information exchange.	• Heritage rescue/salvage operations. • Care for wildlife conservation areas. • General tourism development support.	• Physical damage to heritage sites. • Weak wildlife protection. • Damage to attractions and their access points.
26	**Sugar Corporation**	• Coordinated operations. • Information exchange.	• Heritage rescue/salvage operations. • Care for wildlife conservation areas (adjacent to plantations).	• Physical damage to heritage sites. • Weak wildlife protection.
27	**Ministry of Women and Children Affairs**	• Integrating women's and children's affairs into regular operations. • Planning and reporting on Mainstreaming initiatives. • Ensuring women, children, and youth benefit from the sector.	• Integrated work systems. • Information exchange. • Providing guidelines, training, and advisory services on Mainstreaming. • Signing of MoUs.	• Failure to achieve effective results in gender-related goals and social equity.

28	**Regions and City Administrations**	• Support and guidance across all sectoral services.	• Provision of infrastructure for sectoral services (including land, finance, and other support). • Localized implementation of national strategies.	• Weakened performance in the construction and development of institutional infrastructure.

2. Performance Gaps in Relation to Growth and Transformation Plan (GTP) 1 and 2

It is well known that the tourism sector planned and moved forward with multi-faceted activities during the past two Growth and Transformation Plan (GTP) periods. Regarding its implementation, when we look at it in terms of core plans for example, we find that the achievement has been low. Since the causes and reasons for this are placed in various sections of the analysis, the activities performed and their implementation gaps in the three main sub-sectors are presented below supported by data.

If we look at it from the perspective of heritage, although it was planned to return 100 heritages that had left the country, no more than 2 heritages were actually returned. Regarding the registration of movable heritage, although it was planned to reach 171,000, what was performed is extremely limited.

Because job opportunities and economic benefits have not been ensured in a way that solves the livelihood problems of the large number of society members living in poverty around protected areas, it has been impossible for them to develop a sense of ownership to the desired level; thus, the negative pressure being created on protected areas has been increasing from time to time. Wildlife protected areas are facing high pressure from settlement, overgrazing, farming, forest fires, illegal hunting, and other incompatible development projects and methods of natural resource utilization. From the perspective of controlling illegal trafficking, the expansion and increasing attractiveness of wildlife and wildlife products in the international black market, as well as the lack of trained human power, technology, and other inputs to control the illegal trafficking of wildlife products, are significant gaps of the sector.

An implementation gap is observed because there is no organization, procedure, or strategy that enables the protection of wildlife protected areas from the pressure of natural disasters namely, from forest fires, floods, disease epidemics, landslides, and other similar disasters. Additionally, regarding wildlife tourism, the country's opportunity to benefit from the sector is high when viewed against its potential for nature-based tourism. However, because the wildlife resources in most protected areas have not been properly preserved in a way that can satisfy tourists as destinations, necessary tourism attractions have not been developed, tourist service infrastructure is incomplete,

there is a shortage of human power with sufficient knowledge and skills in the field, there is a lack of incentive systems, and because of marketing and promotion problems, it has not been possible to gain the economic benefits that could be obtained from the sector.

To grow the tourism sector, many activities were performed during the planning period. Accordingly, regarding international tourist flow, although it was planned to grow it from 750,000 in 2015 to reach 2,021,760 in 2020, it was not possible to go beyond a tourist number of 850,000. Regarding revenue obtained from the sector, although it was planned to grow it from 2 billion to 6 billion dollars, it was not possible to achieve more than 50 percent of the revenue. Additionally, although it was planned to build 12 tourist centers, only two were performed in this regard. In terms of destination development, although it was planned to develop 33 existing destinations and 111 new destinations, only 3 existing destinations were built. To solve the information problem in the sector, the plan to increase the number of Culture and Tourism Statistical Information Systems to 2 was not performed.

In general, although many activities were performed during the planning periods, it can be realized that not much distance was traveled in terms of implementation regarding the core activities. This indicates that we must work with foresight and sufficient preparation to fill the aforementioned and similar gaps in our upcoming ten-year development plan; following this, the table below presents the observed implementation gaps and their causes in detail.

Major Implementation Gaps and Their Root Causes

Implementation Gaps	**Causes**
Limited Institutional Executive and Implementation Capacity	• Weak decision-making capacity • Knowledge and skill gaps • Inability to provide fast and efficient service • Weak work culture • Lack of a developed culture of public service (servant leadership)

	• Limited financial options
Weak Information Management and Technology Utilization Capacity	• Poor Information Technology (IT) infrastructure • Low utilization of Information Technology • Lack of knowledge and skills in data organization and management
Weak Linkage with Stakeholders	• Failure to identify stakeholders based on concrete studies • Failure to establish a permanent consultation/communication system • Failure to operate by preparing joint plans • Inability to utilize the holistic support available from stakeholders • Limited financial options
Inability to Ensure Community Benefit Proportional to the Sector's Potential	• Weak decision-making capacity • Knowledge and skill gaps • Inability to provide fast and efficient service • Weak work culture • Lack of a developed culture of public service • Limited financial options
Deficiency in Service Delivery Quality	• Failure to properly utilize service standards • Inability to proactively understand customer needs • Lack of knowledge and skills in service delivery • Failure to properly implement a system for handling customer grievances • Failure to take corrective measures against entities creating service gaps

	• Failure to utilize technology for service efficiency • Weak work culture • Lack of a developed culture of public service • Limited financial options
Lack of Organizational Consistency	• Gaps in the legal framework • Lack of coordination between Federal and Regional organizational structures • Frequent changes in organizational structure (restructuring)

3. Challenges

As described above in the **SWOT** (Strengths, Weaknesses, Opportunities, and Threats) and **PESTEL** (Political, Economic, Social, Technological, Environmental, and Legal) analysis, the challenges encountered due to the influence of various internal and external factors are presented below along with their detailed descriptions.

No.	Challenges	Detailed Explanation
1.	**Execution and Implementation Capacity Building**	• Frequent turnover of leadership/management. • Limited human resource capacity within the sector. • Difficulties in leadership, monitoring, and support throughout the process from planning to results. • Failure to properly implement various operational regulations and standards. • Problems with failing to provide efficient and standardized services.

2.	**Legal, Procedural, and Organizational Issues**	• Failure to update the sector's numerous policies, laws, regulations, and strategies. • Lack of sufficient operational rules and strategies to execute the sector's mission; and failure to implement existing ones. • Frequent changes in the organizational structure and accountability of sectoral institutions.
3.	**Infrastructure**	• Shortage in both the quantity and quality of road, technology, hospitality, and sports facility infrastructure.
4.	**Information and Technology**	• Failure to establish an accessible, fast, and reliable information system. • Inability to utilize various technologies in a manner that contributes to the development of the sector.
5.	**Social, Economic, and Political Conditions**	• The negative impact on the sector due to conflicts occurring in certain areas. • Political instability in the country preventing the full realization of potential economic benefits from the sector. • Gaps in identifying and utilizing the community's traditional values of coexistence, and the ongoing erosion of these values.
No.	**Challenges**	Detailed Explanation
6.	**Resource Development and Conservation**	• Existence of gaps in identifying potential resources through research and protecting/conserving them using internal capacity and community participation. • Lack of a resource development and conservation strategy.
7.	**Stakeholder Integrated Operations**	• Failure to coordinate and integrate the actors in the sector in a manner that contributes to the success of the institution's mission. • Absence of a permanent communication schedule/program for integrated work with stakeholders.

4. Proposed Solutions

By identifying the challenges encountered above, and in order to include issues that will serve as the starting point for the focus direction of the plan regarding the implementation of the next 10-year plan, challenges and proposed solutions are presented below.

Strategic Focus Area	Proposed Solutions
Execution and Implementation Capacity Building	• Establishing continuous human resource capacity building, education, and training programs in collaboration with higher education institutions. • Developing a planning and monitoring system supported by modern technology.
Legal, Procedural, and Organizational Framework	• Updating policies, laws, regulations, and strategies, and ensuring the preparation of additional legal frameworks that have a fundamental impact. • Creating awareness for implementers regarding sectoral operational rules and strategies; designing and implementing a mechanism to ensure their proper application.
Infrastructure	• Strengthening the sector's internal financial capacity and working in coordination with stakeholders to perform additional infrastructure works. • Designing and implementing a strategy to engage the public, private investors, and stakeholders in the expansion of sectoral infrastructure.
Information and Technology	• Identifying and implementing essential applications and Information Technology products required for the sector. • Establishing an accessible, fast, and reliable information system within the sector.
Social, Economic, and Political Conditions	• Implementing strategies to maximize economic benefits—specifically job creation, contribution to National Product (GDP), and foreign exchange earnings—by identifying, studying, and protecting tourism resources for national growth and sustainable development. • Enhancing the competitiveness of the sector.
Resource Development and Conservation	• Designing and implementing a strategy that enables the study, protection, and conservation of sectoral resources using internal capacity and community participation.

Stakeholder Integrated Operations	• Designing and implementing a mechanism to work sustainably with stakeholders in coordination, from plan preparation to monitoring and evaluation. • Establishing a joint consultative council that involves all sectoral stakeholders.

5. Essential Human and Material Resources for Sectoral Development

Human and material resources play a decisive role in achieving the development plan of the sector. These resources, which can be utilized for sectoral development, are found throughout the structure ranging from the *Kebele* (local) level to the Federal level. Therefore, it is necessary to properly identify our resources over the next ten years and utilize them in a manner that contributes to the success of the plan.

Ethiopia is a country that owns vast cultural, historical, and natural resources that are diverse in their quantity and type. Her fossil remains, her history, and her multi-cultural resources make her unique from any other country. The diversity of Nations, Nationalities, and Peoples; languages; folk histories; housing styles; dietary habits; clothing; traditional tools; artistic and creative assets; beliefs; as well as new innovative activities and results are resources with which our country is blessed. Beyond this, when considering that Ethiopia is the origin of mankind and the owner of ancient and early civilizations, it makes her one of the few countries in the world attested in the fields of both natural and social sciences. Therefore, to study, develop, and utilize these resources, it is extremely essential to identify and protect human and material resources. If we look at the creative industry for instance, studies conducted on the handicraft industry in Ethiopia show that, on a national level, an average of one person per household possesses handicraft knowledge. Based on this calculation, it indicates that approximately 15,897,126 people among the total population of Ethiopia are owners of indigenous handicraft knowledge.

On the other hand, when cultural heritages are viewed in terms of their input for tourism especially at the present time our country's material and spiritual resources enable the strengthening of a visiting culture for ancient and traditional handicraft products, ancient tools, historical sites, architectural structures, age-old villages, ancient cities, statues, memorial sites, galleries, museums, and places associated with a historical event or a famous individual, as well as traditional ceremonial festivals. Therefore, if proper attention is given to these cultural resources

in our country and they are developed with appropriate protection and care, it is possible to make Ethiopia a competitive country in the tourism sector. Furthermore, Ethiopia is a country where the Dallol area, known for being the lowest point in the world, and the Simien and Bale mountains, known for their world-renowned heights, are found. Because of this, it has made her a country where all types of landscapes and climates are found. Consequently, if these natural, historical, and cultural resources are protected, developed, and put to use, they can become a major source of income for the country.

In terms of Ethiopia's diverse landscapes and climates, she encompasses vast and biodiverse natural ecosystems; following this, she is the owner of various rare and marvelous wildlife species. Based on their diverse wildlife habitats, these are found in various types of protected areas identified through study namely, 27 National Parks, 2 Wildlife Sanctuaries, 6 Wildlife Reserves, 25 Controlled Hunting Areas, 12 Community-Based Wildlife Conservation Areas, and 5 Biological Zones/Biosphere Reserves. Collectively, there are 77 wildlife protected areas, covering 8.6% of the country’s total land area.

According to biological studies conducted so far, inside and outside these wildlife protected areas, 325 mammal, 872 bird, 240 reptile and amphibian, 71 frog, and 200 fish species have been registered; among these, 57, 18, 15, 30, and 41 species respectively are endemic species found only in Ethiopia. The existence of these resources in our country provides a broad opportunity to sustainably grow the tourism sector and to enable the community living around destinations to perform environmental conservation work. Additionally, our country possesses numerous attractions essential for tourism sector development; uniquely among other African countries, she possesses amazing historical and cultural destinations in addition to natural resources. Being the owner of 13 international heritages registered by UNESCO which can be visited and are not found in other African countries will contribute significantly to the country's economy through tourism revenue if it is possible to work hard in this regard.

When viewed from the perspective of our development resources in hospitality and similar service sectors, 353 standardized hotels, 70 lodges, 300 restaurants, and many thousands of tourism service-providing organizations that are not included in the standard ratings have been created. Additionally, there are 600 legally recognized tour operation companies.

6. Ministry Of Tourism Mission, Vision, Values

Mission: To create a sustainable and competitive tourism industry and ensure superior social, economic, and ecological benefits by studying our country's cultural, historical, and natural tourism resources; protecting and developing them through community participation and stakeholder coordination; promoting them; and building our country's positive image.

National Vision: To make Ethiopia an African icon of prosperity.

Institutional Vision: To make the tourism sector one of the primary pillars of national prosperity by excelling in the sector by 2022 (E.C. / 2030 G.C.).

Values:

- **Respecting Diversity**
- **Hospitality**
- **Transparency**
- **Accountability**
- **Readiness for Change**
- **Excellence in Service**
- **Inclusivity**

7. Objectives

By taking the situation analyses detailed above as a starting point and correcting the observed gaps, the sector's ten-year perspective development plan is expected to fulfill its mission and contribute to the country's comprehensive prosperity. Accordingly, the following objectives, which encompass the goals and targets to be executed in the tourism sector over the next ten years, have been designed:

Objective 1: To utilize our country's multi-cultural resources and historical heritages for sustainable, equitable, and accessible economic, social, and political benefit by studying, protecting, and developing them.

Objective 2: To ensure that wildlife and their habitats provide sustainable ecological, economic, and social benefits by developing and protecting them through scientific methods and by ensuring community participation and benefit.

Objective 3:* To enhance international competitiveness and increase the social and economic benefits derived from the sector by developing our country's tourism resources through the participation of stakeholders and the community, creating a competitive workforce, improving the quality of tourist services, and implementing strong marketing and promotion strategies.

8. Strategic Pillars (or Strategic Focus Areas)/Thematic areas

In the coming ten years, to fulfill the missions assigned to the sector at a national level and based on the detailed analyses presented above, the sector will ensure its success by focusing on the major issues identified below. For each strategic focus area, the designed goals and the detailed targets intended to support them have been included. Overall, the six strategic focus areas identified for this plan are presented as follows:

No.	Strategic Focus Area	Expected Results
1	**Cultural and Natural Resource Development and Protection**	Protected and developed cultural heritages and natural attractions.
2	**Competitive Tourism**	Enhanced international competitiveness of the tourism sector.
3	**Community Benefit and Partnership**	A community that benefits through established partnerships.
4	**Information System Excellence**	Streamlined and efficient data analysis, exchange, and utilization.
5	**Institutional Building**	Establishment of modern institutions; designing modern procedures and operational standards.

i. Cultural and Natural Resource Development and Protection

This focus area concerns activities centered on the protection and development of our cultural and natural resources over the next ten years. Accordingly, this focus area is designed to achieve goals

set to enable our cultural and natural resources to serve the country's economic and social development by implementing studies, projects, and proposed solutions that allow for the preservation and care of our existing resources against current threats to their existence, thereby passing them on to the next generation.

ii. Competitive Tourism

It can be confirmed through various metrics that our country, despite utilizing its potential natural and cultural resources, has been unable to gain the benefits it deserves by being competitive in the tourism sector and remains at a low level compared to peer countries. Therefore, this focus area includes major activities to make the tourism sector internationally competitive in a manner that fits the resources we possess over the next ten years. Consequently, the focus area is designed to perform activities centered on destination development, marketing and promotion, and the variety and quality of tourism products and services necessary to achieve this.

iii. Community Benefit and Partnership

It cannot be said with confidence that the community has benefited to the desired extent from the fruits of the tourism sector during previous planning periods. When examining the role of the sector in terms of benefiting from and generating income from both international and domestic tourism activities, it cannot be claimed that the results were satisfactory. Shortages have also been observed in terms of executing the sector's missions effectively by creating partnerships with domestic and foreign entities to strengthen the sector. Therefore, this focus area has been identified with the intention of the sector working in a distinct manner on community benefit and partnership over the next ten years.

iv. Information System Excellence

The tourism sector is one that faces significant gaps regarding the use of modern procedures and information systems. Since the era we are in is referred to as the age of information and knowledge, providing services that are up-to-date and competitive with other countries in the world is a necessity. Viewed from this perspective, because the sector has not established a modern information system, it has been unable to emerge as a competitor at the national, continental, or global levels. Therefore, it is mandatory to establish and implement a technology-supported

information system to streamline the daily activities of the institution and to ensure that both management and implementers have access to quality decisions and services, as well as fast, efficient, high-quality, and timely information. Consequently, as there must be improvements regarding information handling and utilization, Information System Excellence has been included as a focus area in the next ten-year plan.

v. Institutional Building

The tourism sector faces wide gaps regarding operational systems, organization, and human resource capacity, as well as the preparation and implementation of policies and laws. Consequently, as the path the sector took in previous planning years was largely characterized by implementation capacity problems and gaps in organizational and operational systems, challenges were encountered in building a modern institution. Beyond this, the human resources within the sector appear to have limitations in work culture and implementation capacity. This has remained an obstacle to the movement aimed at enabling the sector to properly fulfill its mission and register tangible results. Therefore, since making the institution competent and effective is only possible by significantly filling these capacity gaps, Institutional Building has been taken as a focus area for the upcoming planning period.

9. Strategic Focus Areas, Goals, and Targets

Strategic Focus Area	Goal	Indicator	Measurement Unit	Baseline	Target	Executing Body
1. Cultural and Natural Resource Development	**1. Increasing Heritage Conservation and Protection**	Tangible heritages registered by UNESCO	Number	9	19	Authority for Heritage Research and Conservation (AHRC), Regional Culture and Tourism
		Strategy developed to assist in heritage conservation at the national level	Number	0	1	AHRC
		Intangible cultural heritages registered by UNESCO	Number	4	14	AHRC
		Written (manuscript) heritages registered for international recognition	Number	12	18	AHRC
		Registered and promoted ethnographic cultures and heritages	Number	150	400	AHRC, Regional Culture and Tourism
		National heritages that have received conservation and care	Number	2	17	AHRC

		Organized database identifying historical, artistic, paleontological, paleoanthropological, and archaeological heritages of high value requiring national protection	Number	40,000	85,000	AHRC
		Registered tangible (immovable) heritages	Number	4,286	2,200*	AHRC, Regional Culture and Tourism
		Registered movable heritages	Number	37,950	85,000	AHRC, Regional Culture and Tourism
		Conservation and maintenance activities for tangible heritages	Number	3,172	7,686	AHRC
		Movable heritages that received conservation and care	Number	61,674	28,661 *	AHRC, Regional Culture and Tourism
		Comprehensive national heritage repair and maintenance document prepared and implemented	Number	0	1	AHRC
		Unified heritage administration system established by identifying the roles of the Federal government and Regions	Number	0	1	AHRC
		System established to produce trained human resources in heritage repair and to organize laboratories and workshops	Number	0	1	AHRC
		Publications and promotional works on intangible cultural heritages registered by UNESCO	Number	0	4	AHRC

		Established Heritage Development Fund	Number	0	1	AHRC
		Studies conducted on archaeology and intangible cultural heritage	Number	5	90	AHRC
		Published research documents regarding intangible cultural heritage and archaeology	Number	0	50	AHRC
		Written heritages sent with descriptions prepared for UNESCO registration	Number	12	18	AHRC and National Archives
		National Heritage Restitution Committee established and operationalized at the national level	Number	0	1	AHRC
		Heritages returned to the country that had previously left through various means	Number	2	100	AHRC
2. Wildlife Conservation and Development	2. Enhancing Wildlife Conservation and Development Works	Reduced illegal activities	Percentage	69%	90%	Wildlife Conservation Authority
		Protected areas free from man-made pressure	Percentage	70%	90%	Wildlife Conservation Authority
		Increased disaster prevention and control readiness	Percentage	51%	80%	Wildlife Conservation Authority
		Reduced conflict between wildlife and humans	Percentage	65%	90%	Wildlife Conservation Authority
		Increased coverage of wildlife protected areas	Percentage	8.6%	14.0%	Wildlife Conservation Authority
		Coverage of recovered and enriched wildlife and habitats	Percentage	51%	80%	Wildlife Conservation Authority
		Increased wildlife infrastructure coverage	Percentage	40%	80%	Wildlife Conservation Authority

		Problem-solving study and research works regarding wildlife conservation and development	Number	15	205	Wildlife Conservation Authority
		Study and research results put into practice	Number	-	225	Wildlife Conservation Authority
		Increased wildlife health service coverage	Percentage	51%	100%	Wildlife Conservation Authority
		Increased climate change contribution (Mitigation/Adaptation)	Percentage	51%	80%	Wildlife Conservation Authority
		Increased carbon sequestration storage in protected areas	In Millions	238	3118	Wildlife Conservation Authority
3. Competitive Tourism	7. Expanding Sectoral Investment	Financing supply system established specifically for new entrants in the sector	Number	0	1	Ministry of Tourism
		System designed to make land supply accessible in cities and areas where sector infrastructure has not expanded	Number	0	1	Ministry of Tourism
		Destination development investment projects executed in collaboration with private investors around natural resources and parks	Number	0	15	Ministry of Tourism
		Incentive system established for investors engaging in the sector	Number	0	4	Ministry of Tourism
		Establishing a streamlined input (credit and land) supply system for investors engaging in areas lagging behind in culture, tourism, and sports infrastructure	Number	0	1	Ministry of Tourism
		Investors engaged in foreign and domestic tourism investments (lodges,	Number	0	70	Ministry of Tourism

		hotels, restaurants) (20 Foreign, 50 Domestic)				
		Coordination activities conducted to enable investors to enter and invest in destination development through Chain Hotels via FDI	Number	0	20	Ministry of Tourism
		Tourism investment clusters created based on the diversity of tourism resources	Number	0	10	Ministry of Tourism
		Investment and promotion tours conducted for domestic and foreign investors to invest in selected tourist destinations	Number	2	22	Ministry of Tourism
		Tourism destination investment promotion handbook prepared	Number	0	10	Ministry of Tourism
		Annual tourism investment forums conducted involving government officials, media, and stakeholder leaders	Number	0	10	Ministry of Tourism
		Preparation of a tourism infrastructure strategy	Number	0	1	Ministry of Tourism
		Investment strategy prepared for those engaging in the tourism sector	Number	0	1	Ministry of Tourism
	8. Modernizing and Improving Sectoral Service Delivery through Technology	Number of tourist service provider institutions with improved service delivery quality	Number	1,348	2,696	Ministry of Tourism
		Visitor satisfaction level	Percentage	50%	75%	Ministry of Tourism
		Certification and annual award program for entities engaged in guiding	Number	0	1	Ministry of Tourism

		services (tour drivers, tour guides, travel agents, scouts, local guides)				
		System designed to build tour operator capacity, establish a regulatory system, and implement a Quality Management System (QMS) in the private sector	Number	0	1	Ministry of Tourism
		Established system for standardization and annual quality control of service delivery in cinemas, theaters, museums, libraries, and cultural institutions	Number	0	10	Ministry of Tourism
		Semi-annual consultative forums for sectoral service providers on the implementation of the COVID-19 health monitoring system	Number	0	40	Ministry of Tourism
		Food preparation (culinary) training provided based on visitor preferences	Number	0	3	Ministry of Tourism
		Certification program provided for professionals in sports service institutions, museums, libraries, cultural institutions, cinema, and theater	Number	0	1	Ministry of Tourism
		Tourist security police service established and operationalized	Number	0	12	Ministry of Tourism
		Technological service system to enable contactless service delivery in the hospitality sector	Number	0	1	Ministry of Tourism
		Strategy designed to withstand man-made and natural disasters and periods of crisis in the sectors	Number	0	1	Ministry of Tourism
		Program designed and implemented to ensure transport safety and tour operator competency	Number	0	1	Ministry of Tourism

		Operational procedure implemented to improve tourist safety and handling	Number	0	1	Ministry of Tourism
		Health posts established around destinations to ensure tourist health	Number	0	30	Ministry of Tourism
		Tourist rest areas, restrooms, and health posts built every 100 kilometers along cross-country roads	Number	0	100	Ministry of Tourism
		Staff management and health protection monitoring and inspection standards implemented to improve tourism sector service delivery	Number	0	1	Ministry of Tourism
		Capacity building and superior service delivery for urban tourism competitiveness	Number	0	38	Ministry of Tourism
		Certification program designed for the continuity of professionals within the tourism industry	Number	0	1	Ministry of Tourism
		Established national tourist safety monitoring system	Number	0	1	Ministry of Tourism
		Procedure established to strengthen smooth relations within the value chain	Number	0	1	Ministry of Tourism
		Social tourism organizational system established by coordinating government and private entities	Number	0	1	Ministry of Tourism
		Digital tourism strategy prepared	Number	0	2	Ministry of Tourism
		Tourism dashboard prepared	Number	0	2	Ministry of Tourism
		Website developed and updated in coordination with regions to promote tourism attraction resources	Number	0	10	Ministry of Tourism
	9. Developing the Domestic Visiting Culture	Number of domestic tourists	In Millions	23.7	70	Ministry of Tourism

		System established to encourage tour operators who sell marketing, promotion, and package tours for domestic tourism	Number	0	1	Ministry of Tourism
		Domestic visiting programs for students, working youth, urban residents, civil service, and private sector employees	Number	0	1	Ministry of Tourism
		Package sales and promotional procedures established to encourage visiting opportunities for persons with disabilities, the underprivileged, youth, and women	Number	0	1	Ministry of Tourism
		Strengthened social tourism organization by integrating government and private sectors to withstand the impact of COVID-19	Number	0	1	Ministry of Tourism
		System established to expand Solidarity Tourism to withstand the impact of COVID-19	Number	0	1	Ministry of Tourism
		Operational system established to strengthen public connection through domestic tourism	Number	0	1	Ministry of Tourism
		"Land of Origins" campaigns conducted to grow domestic tourism	Number	0	10	Ministry of Tourism
		Standard Guidebooks prepared for domestic visitors	Number	0	5	Ministry of Tourism
	10. Strengthening Destination and Attraction Development	New tourist destinations developed	Number	0	120	Ministry of Tourism
		Added values incorporated into existing destinations	Number	10	107	Ministry of Tourism

		Destination management strategy prepared	Number	0	1	Ministry of Tourism
		Established destination management institution	Number	0	1	Ministry of Tourism
		Policy and operational system established to support and enable government and private investors to work in coordination on park administration and development	Number	0	2	Ministry of Tourism
		Creation of favorable conditions for tourists in destinations where parks and protected forests are located, including the construction of internal vehicle and pedestrian roads, and fulfillment of necessary facilities and services	Number	0	30	Ministry of Tourism
		Operational system established to develop natural resources through Public-Private Partnerships (PPP)	Number	0	1	Ministry of Tourism
		Activities aimed at developing parks, facilitating campsites, fulfilling restrooms and other essentials, and benefiting the community	Number	0	14	Ministry of Tourism
		Destination development plan and packaging system prepared (attracting new products, new countries, and generations)	Number	0	1	Ministry of Tourism
		System prepared to support the diversification of tourism products	Number	0	1	Ministry of Tourism
		Cultural heritage tourism product packages prepared specifically for the Middle East, Asia, Iran, and Turkey	Number	0	1	Ministry of Tourism

		Tourism zone and corridor development strategy prepared	Number	0	1	Ministry of Tourism
		Policy and operational procedures prepared for government and private investors to work in coordination on park administration and development	Number	0	1	Ministry of Tourism
		Locations where community tourism programs have been designed and community tourism has commenced	Number	2	20	Ministry of Tourism
		Programs designed and implemented to expand cable car, mountain, rural, hot springs, natural, community, and sports tourism	Number	0	30	Ministry of Tourism
		Number of foreign tourists	In Millions	0.85	7.3	Ministry of Tourism
		Brands developed for destination sites, cities, and regions	Number	0	44	Ministry of Tourism
		Established inclusive tourism system	Number	0	1	Ministry of Tourism
		Strategy prepared for the establishment of resort cities	Number	0	1	Ministry of Tourism
		Water tourism development strategy prepared	Number	0	1	Ministry of Tourism
		Operational system established for the development of waterfront tourism	Number	0	1	Ministry of Tourism
		Promotion and market development conducted to develop medical destination sites	Number	0	1	Ministry of Tourism
		System prepared to conduct mountain sports races with famous athletes	Number	0	1	Ministry of Tourism
		Mountain races conducted in selected locations	Number	0	4	Ministry of Tourism

		Sites prepared for racing competitions to expand sports tourism	Number	0	1	Ministry of Tourism
		System established for site design, boundary demarcation, and proclamation drafting for natural and cultural heritage tourist destinations	Number	0	1	Ministry of Tourism
	11. Enhancing Tourism Marketing and Promotion	Expanded tourist market countries (moving from North America, UK, Italy, and Germany to other European countries, India, Brazil, Mexico, Middle East, Scandinavia, Russia, Far East, and Turkey)	Number	4	12	Ministry of Tourism
		Procedures and organizational structure created to collect and analyze information from the global tourism market	Number	0	1	Ministry of Tourism
		Domestic market and promotion programs designed	Number	0	2	Ministry of Tourism
		"One Africa Carnival" events conducted by Tourism Ethiopia	Number	0	2	Ministry of Tourism
		System prepared for creativity and innovation in the tourism market	Number	0	1	Ministry of Tourism
		Product development and sales packages prepared for local rural, mountain, sports, cultural, agricultural, and natural tourism	Number	0	20	Ministry of Tourism
		International films produced/shot within Ethiopia	Number	0	5	Ministry of Tourism
		International Association Meetings successfully attracted to Ethiopia	Number	15	45	Ministry of Tourism

		System prepared for the Diaspora to engage in promotional work for our country's products	Number	0	1	Ministry of Tourism
		Established Tourism Fund for national tourism promotion and marketing	Number	0	1	Ministry of Tourism
		Participation in selected international trade fairs and business-to-business (B2B) forums annually	Number	0	20	Ministry of Tourism
		Familiarization (Introductory) trips conducted	Number	0	5	Ministry of Tourism
		Expanding international market reach by opening marketing offices in major world countries to promote Ethiopia	Number	0	3	Ministry of Tourism
		"Africa Carnival" events with the participation of 55 African countries	Number	0	10	Ministry of Tourism
		Procedures established to conduct marketing and B2B work to create clear market partnerships between the government and private sector	Number	0	100	Ministry of Tourism
		Conferences held to support and strengthen the focus on regional and continental markets for tourism products	Number	0	4	Ministry of Tourism
		Promotional works to strengthen market segmentation and prioritization for domestic, international, continental, and regional markets	Number	0	10	Ministry of Tourism
		Established online and digital marketing system	Number	0	1	Ministry of Tourism
		Procedures prepared to provide special visas and airport entry for VIP visitors	Number	0	1	Ministry of Tourism

		"My Home Ethiopia" campaign prepared for regional countries	Number	0	1	Ministry of Tourism
		"My Origin Ethiopia" campaign prepared for Africans	Number	0	1	Ministry of Tourism
		Established Convention Centers	Number	0	5	Ministry of Tourism
		National tourism exhibitions organized	Number	0	10	Ministry of Tourism
		Support provided for the establishment of tourism enterprises	Number	0	20	Ministry of Tourism
		"Land of Origins" promotion activities conducted in the presence of our country's embassies	Number	0	66	Ministry of Tourism
		Advertisements produced in various languages to promote "Land of Origins"	Number	4	24	Ministry of Tourism
		New packages prepared to promote major attractions and grow "Stop Over" tourism	Number	0	40	Ministry of Tourism
		"Land of Origins" promotions conducted for various meetings and events held within the country	Number	0	200	Ministry of Tourism
		Packages prepared to extend tourist stay by linking Addis Ababa with cities within a two-hour radius	Number	0	1	Ministry of Tourism
		"Must See" development packages prepared for 13 parks and 4 natural forest reserves for international and domestic visitors	Number	0	17	Ministry of Tourism
		"Travel to the First Country of Refuge" Al-Nejashi travel tourism product package	Number	0	1	Ministry of Tourism

		Promotion and market packages prepared for hot springs, traditional medicine, and medical tourism	Number	0	1	Ministry of Tourism
		Promotional films prepared to establish sports tourism as an international destination	Number	0	4	Ministry of Tourism
		Promotional package prepared to introduce tourism products of the Grand Ethiopian Renaissance Dam (GERD)	Number	0	1	Ministry of Tourism
		Tourism share of Gross Domestic Product (GDP)	Percentage	6.1%	10%	Ministry of Tourism
		Visitor expenditure per day	USD	234.5	158.6*	Ministry of Tourism
		Average tourist length of stay	Days	16	20	Ministry of Tourism
		Increased occupancy rate of hospitality institutions	Percentage	65%	85%	Ministry of Tourism
5. Information System Excellence	12. Enhancing Sectoral Information and IT Utilization / Strengthening Data Collection, Handling, and Dissemination	Technologies and applications that help make tourism services contactless	Number	0	12	Ministry of Tourism
		New technological outputs put into use (TSA, CSA, SSA, digital marketing, digital tourist travel info system, tourist payment)	Number	3	11	Ministry of Tourism
		Free call centers available in the sector	Number	1	13	Ministry of Tourism
		Automation work carried out to make the tourist payment system technology-supported	Number	0	1	Ministry of Tourism
		Sectoral monitoring, control, and support system established in accordance with international standards	Number	0	1	Ministry of Tourism

		Unified planning and reporting system established in the sector from Kebele to Federal level	Number	0	1	Ministry of Tourism
		Information collected and analyzed regarding tourism market intelligence in selected target countries	Number	0	20	Ministry of Tourism
		International market information collected and analyzed for tourism	Number	0	20	Ministry of Tourism
		Established Knowledge Management organization and system	Number	0	1	Ministry of Tourism
		Increased use of technology in the sector	Percentage	30%	75%	Ministry of Tourism, Wildlife Conservation Authority, Heritage Conservation Authority
		Increased data management and utilization in the sector	Percentage	51%	100%	Ministry of Tourism, Wildlife Conservation Authority, Heritage Conservation Authority
6. Institutional Building	13. Enhancing Sectoral Study and Research Works	Conducted study and research works	Number	139	282	Heritage Conservation Authority, Wildlife Conservation Authority, Ministry of Tourism
		Study and research works put into practical use	Number	134	480	Heritage Conservation Authority, Wildlife Conservation Authority, Ministry of Tourism
		Published and accessible study and research works	Number	104	256	Heritage Conservation Authority, Wildlife Conservation

						Authority, Ministry of Tourism
		Establishing a system to rescue parks and lakes identified as being at risk through the cooperation of the four economic actors	Number	0	6	Heritage Conservation Authority, Wildlife Conservation Authority, Ministry of Tourism
		System established to allow 10 research institutions and 8 media outlets to contribute to destination development	Number	0	1	Heritage Conservation Authority, Wildlife Conservation Authority
		Prepared research publications and annual journals	Number	0	10	Heritage Conservation Authority, Wildlife Authority, Ministry of Tourism
		Studies conducted regarding MICE tourism	Number	0	10	Ministry of Tourism
		Strategy prepared for MICE tourism	Number	0	1	Ministry of Tourism
	14. Enhancing the Sector's Education and Training System	Preparing a clear strategy for human resource development in the tourism sector; procedures prepared to link training with industry growth	Number	0	2	Ministry of Tourism
		Program designed to increase tourism education for the community	Number	0	1	Ministry of Tourism
		Tourism awareness programs broadcast on mass media once a week	Program	0	520	Ministry of Tourism
		Education and training programs designed to empower professionals	Number	0	1	Ministry of Tourism
		Individuals trained in various professions within the tourism, heritage conservation, and wildlife sectors	Number	32,948	67,910	Heritage Conservation Authority, Wildlife Authority, Ministry of Tourism

		Improved sectoral curriculum (incorporating Digital Marketing into the curriculum)	Document	0	1	Ministry of Tourism
		Capacity building training provided to stakeholders within the MICE value chain	Number	0	40	Ministry of Tourism
		Implemented national tourism skills audit, curriculum revision, and capacity building program	Number	0	1	Ministry of Tourism
		Partnerships established with 10 renowned international hotel and tourism educational institutions	Number	1	11	Ministry of Tourism
		Program to train, consult, and empower tourism professionals in 50 tourist destination cities	Number	0	In 50 cities	Ministry of Tourism
		Training program established for sectoral leaders from the Federal level down to the lowest administrative tier	Number	0	1	Ministry of Tourism
		Centers opened in the field of natural tourism and wildlife education/training	Number	-	2	Ministry of Tourism
		Program designed to raise awareness on the conservation of cultural and natural tourist destinations	Number	0	1	Ministry of Tourism
		Coverage of trained human resources in the tourism sector	Percentage	23%	59%	Ministry of Tourism
	15. Excelling Institutional Building of the Sector	Sector transformation implemented based on studies	Number	0	1	Heritage Conservation Authority (HCA), Wildlife Authority, Ministry of Tourism

		Support program designed and implemented for regions and zones requiring special assistance	Number	0	1	HCA, Wildlife Authority, Ministry of Tourism
		Established sectoral study, research, and human resource development institution	Number	0	1	HCA, Wildlife Authority, Ministry of Tourism
		Various operational frameworks prepared (details specified in the two tables below)	Number	-	62	HCA, Wildlife Authority, Ministry of Tourism
		Increased sectoral execution and implementation capacity	Percentage	60%	80%	HCA, Wildlife Authority, Ministry of Tourism
		Organized and implemented strong monitoring, evaluation, and control system	Number	0	1	HCA, Wildlife Authority, Ministry of Tourism
7. Community Connection, Benefit, and Partnership	16. Enhancing Coordination, Partnership, and Diplomacy; Elevating the role of the Four Actors	Conventions and tripartite relations signed and adopted by our country	Number	5	10	HCA, Wildlife Authority, Ministry of Tourism
		System established for heritage repair through cooperation and linkage between the four economic actors and heritage owners	Number	0	1	Heritage Conservation Authority
		Bilateral agreements signed by our country	Number	25	50	HCA, Wildlife Authority, Ministry of Tourism
		Established sectoral communication strategy and operational system	Number	0	1	Ministry of Tourism
		System established to enable research institutions and media outlets to contribute to the development of	Number	0	1	Wildlife Authority, Ministry of Tourism

		destinations (parks, lakes, forests, mountains, waterfalls)				
		Familiarization (FAM) trips organized by conducting conferences and signing Memorandums of Understanding (MoU) with tourism and tour operator associations from ten countries	Number	0	10	Ministry of Tourism
		[Coordination system established] between the Ministry, Civil Aviation, Ministry of Health, Hotel Associations, and Ethiopian Airlines within the tourist and tourism sector	Number	0	1	Ministry of Tourism
		Operational system established to monitor sector employees and to prevent/respond to pandemics	Number	-	1	Ministry of Tourism
		Strategy prepared to maintain and repair heritages using internal capacity by coordinating indigenous knowledge, skills, and investors	Number	0	1	Heritage Conservation Authority (HCA)
		Additional financial sources obtained from the government for tourism development by strengthening communication and resource mobilization	Number	0	6	HCA, Wildlife Authority, Ministry of Tourism
		Prepared development project proposals and partnership forums	Number	3	33	HCA, Wildlife Authority, Ministry of Tourism
		Coordination system established with relevant bodies to expand medical tourism	Number	0	1	Ministry of Tourism

	17. Increasing Sectoral Income and Job Creation	Job opportunities created in the tourism sector	Number	1,500,000	2,000,000	Ministry of Tourism, Regional Culture & Tourism
		Revenue generated from tourism	In Billions (USD)	3.17	23.15	Ministry of Tourism, Regional Culture & Tourism
	18. Increasing Community Participation, Awareness, and Benefit	Number of community members benefiting from the sector	Number	-	2 Million	HCA, Wildlife Authority, Ministry of Tourism
		Number of people reached through awareness programs	Number	-	30 Million	HCA, Wildlife Authority, Ministry of Tourism
	19. Improving Sectoral Communication and Image Building Performance	Incentive system for micro and small enterprises and individuals bringing innovative ideas to the sector	Number	0	1	Ministry of Tourism
		Number of organized recording studios	Number	0	1	Ministry of Tourism
		Promotional works produced on five international media outlets to reduce the impact of COVID-19 on the tourism sector	Productions	0	20	Ministry of Tourism
		30-minute weekly television programs on tourism products aired on domestic media	Number	104	1,040	Ministry of Tourism
		30-minute weekly radio programs on tourism products aired on domestic media	Number	0	520	Ministry of Tourism
		Operational system established to create new working relationships with media and forums working in the tourism sector	Number	0	1	Ministry of Tourism

		Memorandums of Understanding (MoU) and operational systems established for promotional work in tour operator journals, mainstream media, and social media across ten countries	Reach/No.	0	1	Ministry of Tourism
		Tourism reach/promotion on Twitter (X), YouTube, Facebook, and other social media platforms	Reach	0	40	Ministry of Tourism
		Number of international media campaigns conducted to revitalize the sector	Number	-	-	Ministry of Tourism
		Prepared, revised, and implemented events calendar	Number	0	1	Ministry of Tourism
	20. Ensuring Sustainable Development and Increasing the Participation and Equitable Benefit of Youth and Women	Number of tree seedlings planted and cared for	Number	50,000	100,000,000	Heritage Conservation Authority, Wildlife Authority, Ministry of Tourism
		Women and youth participating in and benefiting from job opportunities in the sector	Number	1,152,613	2,471,406	Heritage Conservation Authority, Wildlife Authority, Ministry of Tourism
		Women participating in and benefiting from job opportunities in the sector	Number	658,634	1,142,232	Heritage Conservation Authority, Wildlife Authority, Ministry of Tourism
		Management plan and guidelines prepared in coordination with relevant bodies for the protection and care of cultural and natural tourist destinations	Number	0	1	Wildlife Authority, Ministry of Tourism

		Sustainable tourism strategy prepared for 13 parks and 4 protected forests	Number	0	1	Tourism Ethiopia, Destination Management
		Waste disposal system established at destination sites, protected forests, and parks	Number	0	1	Wildlife Authority, Ministry of Tourism
		Increased contribution to climate change [mitigation]	Percentage	51%	80%	Wildlife Authority
		Increased carbon sequestration storage in protected areas	In Millions	238	3,118	Wildlife Authority

10. Strategic Directions

While the gaps and challenges observed in the sector at the end of the 2nd Growth and Transformation Plan (GTP II) have been presented in detail previously, this section presents the strategic focus directions for the planning years based on the preceding analyses.

Building Implementation and Execution Capacity (Institutional Building)

The main activities to be carried out under this focus direction are:

- Empowering the human resources engaged in the sector with knowledge and skills;
- Carrying out sector and institutional transformation or change;
- Implementing policy and legal reforms;
- Excelling service delivery by empowering professionals engaged in service-providing institutions through short, medium, and long-term training;
- Expanding alternative sources of finance;
- Structuring the sector in a uniform organizational setup, as well as establishing necessary new institutions;
- Strengthening public organizations;
- Increasing the use of digital technology, modernizing the information management system with technology, and developing modern and user-friendly applications;
- Developing Satellite Accounts (for Culture, Tourism, and Sport);

Expanding Infrastructure Supply

By establishing collaborative working procedures with other sectors and stakeholders:

- Developing new tourism destination sites;
- Expanding hotel and tourism training centers;
- Expanding the infrastructure of tourist destinations (roads, water, electricity, telephone, and internet services);
- Expanding convention/exhibition centers.

Strengthening the Individual and Collective Linkages of Sectoral Actors; as well as Strengthening Collaborative Procedures with Partners and Stakeholders

To strengthen the collaborative procedures of sectoral actors, special attention will be given to the following issues:

- Linkage with research and study institutions (expanding ties with academic institutions);
- Expanding ties with the media;
- Supporting and strengthening the standing of the private sector through operational procedures;
- Strengthening the individual standing of the four actors in the sector as well as enhancing their mutual linkages;
- Increasing infrastructure supply;
- Strengthening human resource development;
- Expanding alternative financial capacity;
- Strengthening technology development and utilization;
- Enhancing collaborative procedures in terms of properly utilizing national resources.

Increasing the Role of the Private Sector in Sectoral Development

Issues focused on under this include:

- Enhancing the participation of investors in the sector;
- Identifying alternative fields of work and providing support for their implementation;
- Strengthening the partnership between the government and the private sector.

Withstanding the Negative Impact of COVID-19 on the Sector and Enabling Recovery

Issues focused on under this include:

- Studying and evaluating the impact of the pandemic on the culture, tourism, and sports sectors at a national level;
- Designing recovery strategies for each sector based on the fundamental information obtained from the study;
- Supporting various entities of the sector that have been affected to recover through financial, training, and material support in consultation with stakeholders and donors;

- Promoting our country extensively and strengthening our foreign relations work supported by technology;
- Conducting adequate preparations to uniquely welcome various guests coming to our country after the pandemic and ensuring their stay is unforgettable.

11. Institutional Implementation Capacity, Policies, and Strategies

To realize the national development capacities and goals of the sector, the primary issues required for strengthening the institutional implementation capacity to implement the 10-year lead development plan spanning from the 2013 to 2022 E.C. fiscal years as intended by examining, adjusting, and preparing strategies, policies, legal frameworks, operational adjustments, organizational changes, and technological inputs are presented as follows.

11.1 Prepared Policies, Strategies, Proclamations, and Operational Procedures

Policies to be Revised	New Policies	Strategies
Tourism Policy	Heritage Conservation Policy	Destination and Tourism Product Development and Administration Strategy
Wildlife Policy		Tourism Human Resource Development Strategy
		Marketing and Promotion Strategy
		Tourism Services Excellence Strategy
		Tourist Information Dissemination Strategy
		Destination Area Community Participation and Benefit Strategy
		Government and Private Sector Partnership (PPP) in Tourism Development Strategy
		Equitable Tourism Trade Strategy
		Tourist Safety and Protection Strategy

11.2 Policies, Strategies, and Operational Procedures

No.	Proclamations, Regulations, and Directives	Operational Adjustments / New Procedures
1	Heritage Conservation and Development Amendment Proclamation; Tourism Development Policy Implementation Regulation and Directive	Preparing education, training, study, and research standards and manuals
2	Wildlife Conservation Amendment Proclamation	Heritage conservation and care implementation regulation and directive; preparing Memorandums of Understanding (MoU) with relevant stakeholders
3	Tourism Development Proclamation	Improved tourism foreign exchange payment and utilization system; tourism services grading standards
4	Tourism Fund Proclamation; Wildlife Development, Conservation, and Utilization Regulation	Preparing an operational framework for tourism destination competitiveness indicators
5	Tourism Destination Administration Regulation and Directive	Tourism destination payment system regulation and directive; preparing guidelines for destination area community participation and benefit
6	National Museum Establishment Proclamation	Tourism Fund Proclamation implementation regulation and directive; Event Tourism facilities standards
7	Tourist Service Provider Organizations Grading Amendment Regulation	Preparing competency certification and control criteria, manuals, and checklists for tourist service provider organizations
8	National Museum Directive	Preparing museum standards

11.3 Technological Inputs and Organizational Changes

Technological Inputs

- Modernizing the sector's information system by developing the Tourism Satellite Account;
- Establishing a Digital Resource Mapping and Destination Management Information System (DMIS);
- Supporting payment systems with modern technology;
- Establishing a Tourism Online Booking and Marketing System;

- Supporting the certification of tourist service provider competency, grading, and monitoring and support activities through digital technology operational systems;
- Supporting museums and destination sites with modern and innovation-centered technologies;
- Utilizing smart technology in protected areas.

Organizational Changes

1. Transforming the operational procedures of the sector and the institution;
2. Ensuring the sector has a coordinated and harmonized organizational structure from the Federal level down to the regional and lowest government administrative tiers;
3. Establishing an institution capable of developing and promoting Event Tourism with special focus;
4. Building a Destination Development and Administration Institution;
5. Establishing a National Museum;
6. Ensuring the tourism sector's structural horizontal organization is adjusted and improved in a uniform manner that facilitates operations.

12. Financial Requirements

Since the tourism sector is an industry developed through the leadership of the government, as the community serves as the base, and with the private sector as the driving engine alongside the participation of other actors the collaboration and coordinated efforts of all stakeholders are essential to rapidly grow and develop the sector. To strengthen this effort and ensure the sector's development, adequate financial sources must be available. Accordingly, this ten-year sectoral lead plan will be implemented based on the following financial sources:

Standard Financial Sources: The major financial sources included under this category are:

- Regular, capital, and investment budgets related to the overall development of the sector allocated by the Federal Government, National Regional Governments, City Administrations, and bodies at every administrative level.

Additional Financial Sources: The major financial sources included under this category are:

- Various supports obtained from bilateral and multilateral development cooperation for the implementation of programs and projects related to the growth and development of the sector;
- Financial support, loans, and aid obtained from non-governmental donor organizations;
- From the Tourism Fund to be established in the future;
- Financial support obtained from sponsorships;
- Revenue collected from various services;
- Support obtained from investors;
- Various related financial sources from the public and other relevant bodies.

The forecast for regular and capital finance required for the sector's development plan for the next ten years, including financial support from projects, is presented in the table in Annex 7. The budget sources are the government and donor organizations. Accordingly, the government is expected to allocate a total of 50,712,453,635.36 Birr for the capital budget, including salaries and regular expenses, while it is assumed that 1,640,000,000 Birr will be obtained from various development partners and donor governments, and 48,170,000,000 Birr from bank loans. In total, 100,522,453,635.36 Birr is required to realize the ten-year lead development plan for the tourism sector.

13. Performance Monitoring and Evaluation System

By implementing the sectoral development plan through the participation of the community and stakeholders, and by fulfilling its share in the success of the national vision by achieving set goals, the following monitoring, evaluation, and support directions will be put into practice during the planning period:

1. Gathering input and reaching a common consensus by discussing the sectoral lead development plan with regions and associations;
2. Preparing mid-term and annual development plans at every level and monitoring their implementation;
3. Presenting the lead plan to the council for approval and providing support by evaluating its performance progress periodically;
4. Strengthening the sector's capacity by ensuring that those without monitoring and evaluation structures establish them, and by strengthening existing ones, taking into

account the "Council of Ministers Directive for Monitoring and Evaluation of National Growth and Transformation Plan Implementation" effective since January 1, 2010 (E.C.);

5. Selecting identified Key Result Areas (KRAs) and Key Performance Indicators (KPIs) of the sector for focused monitoring;
6. Ensuring effectiveness by organizing annual plan preparation and performance evaluation forums for the sector and stakeholders and presenting monitoring and evaluation work;
7. Monitoring to ensure that physical visits, report communications, and performance report evaluations are submitted according to the established timeline at every level;
8. Preparing quarterly and annual reports showing the plan performance of stakeholders and presenting them to the council and relevant bodies;
9. Providing support for stakeholders at every level to monitor and evaluate the plan implementation process through field visits;
10. Evaluating mid-term plan performance as necessary and carrying out revision work on the plan.

14. Sectoral Diplomacy and Strategic Partnership

From Domestic / Within the Country

Institution	Area of Collaboration / Engagement
Ministry of Foreign Affairs	National image building, tourism market development and promotion, and economic diplomacy
Ministry of Trade and Industry	Tourism business licensing, renewals, and tourism trade operations
National Bank of Ethiopia	Foreign exchange earnings from tourism, distribution, utilization, and regulation
Banks	Payment systems, fund transfers, and credit/loan facilities
Ministry of Education	Education and training related to tourism, heritage, and wildlife conservation
Ministry of Peace	Fostering public closeness, harmony, and national unity
Ministry of Transport	Transportation services related to air and road infrastructure
Investment Commission	Investment licensing, promotion, and investment incentives
Ministry of Innovation and Technology	Innovation advancement and technological infrastructure development

Ethiopian Airlines	Tourist transport services and connectivity
Immigration and Citizenship Service	Visa-related matters and border entry
Environment and Climate Change Commission	Management of parks and natural resource conservation
Regions and the Two City Administrations	Tourism development, investment, protection and care of tourism resources, and peace and security issues
Land Administration Agency	Land supply and allocation
Job Creation Commission	Employment and job creation opportunities

From Abroad / International

Institution/Country for Cooperation and Partnership	**Theme/Objective of Cooperation**
UNWTO (World Tourism Organization)	As a wing of the United Nations, it works on coordinating world nations regarding tourism development and standards.
UNESCO	Cooperation regarding World Heritage sites, conservation, and cultural protection.
WTTC (World Travel & Tourism Council)	Cooperation regarding tourism data, research, and global industry trends.
Countries seeking cooperation in the tourism field	Establishing tourism development linkages and bilateral cooperation.
Donor Organizations (UNDP, GEF, EU, MasterCard, IFC, GIZ, and other development partners)	Cooperation for tourism development projects and sustainable growth initiatives.

Annexes

Annex 1: 10-Year Lead Development Plan Indicators, Baselines, and Targets by Year

Goal	Indicator	Measurement	Baseline	Target	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
1. Enhancing Heritage Care and Protection	Tangible heritages registered by UNESCO	Number	9	19	10	11	12	13	14	15	16	17	18	19
	Strategy prepared for nationwide Heritage Conservation	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Intangible cultural heritages registered by UNESCO	Number	4	14	5	6	7	8	9	10	11	12	13	14
	Written heritages registered for international recognition	Number	12	18	-	14	-	16	-	18	-	-	-	-
	Registered and promoted ethnographic cultures and heritages	Number	150	400	175	200	225	250	275	300	325	350	375	400
	National heritages that received protection and care	Number	2	17	4	6	8	10	12	13	14	15	16	17
	Historical, artistic, paleontological, paleoanthropological, and archaeological heritages organized	Number	40k	85k	43k	47k	52.5k	57.5k	62.5k	67k	71.5k	76k	80.5k	85k

	with modern data management													
	Registered tangible heritages (annual targets)	Number	4,286	2,200*	400	600	800	1,000	1,000	1,000	1,000	1,000	1,000	1,000
	Registered movable heritages	Number	37,950	85,000	27,400	33,800	40,200	46,600	53,000	59,400	65,800	72,200	78,600	85,000
	Tangible heritage conservation and care activities	Number	3,172	7,686	854	850	856	850	856	856	849	857	858	854
	Movable heritages that received protection and care	Number	61,674	28,661*	12,317	14,133	15,949	17,765	19,581	21,397	23,213	25,029	26,845	28,661
	Prepared and implemented inclusive National Heritage Repair and Care document	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Unified heritage administration system established by defining Federal and Regional roles	Number	0	1	-	1	-	-	-	-	-	-	-	-
	System established to produce skilled human resources and organize labs/workshops for heritage repair	Number	0	1	-	1	-	-	-	-	-	-	-	-
	UNESCO registered intangible heritages through publication and promotion works	Number	0	4	-	3	1	-	-	-	-	-	-	-

	Established Heritage Development Fund	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Studies conducted on archaeology and intangible cultural heritages	Number	5	90	9	9	9	9	9	9	9	9	9	9
	Published study documents regarding intangible cultural heritages and archaeology	Number	0	50	5	5	5	5	5	5	5	5	5	5
	Written heritages for which descriptions have been prepared and sent for UNESCO registration	Number	12	18	-	2	-	2	-	2	-	-	-	-
	National Heritage Restitution Committee established and operational at a national level	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Heritages returned to the country that had previously left through various means	Number	2	100	10	10	10	10	10	10	10	10	10	10
	Languages for which writing systems have been developed after phonetic studies	Number	53	73	1	1	2	2	2	2	2	2	3	3
	Professional dictionaries/glossari	Number	0	10	1	1	1	1	1	1	2	2	-	-

	es prepared in national working languages by sector													
	Preliminary dictionaries prepared for endangered languages	Number	53	73	1	1	2	2	2	2	2	2	3	3
	Grammar systems prepared for endangered languages	Number	53	73	1	1	2	2	2	2	2	2	3	3
	Translation and interpretation curriculum developed to produce skilled human resources	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Established Language Development Fund	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Endangered languages documented based on research	Number	7	34	2	2	2	3	3	3	3	3	3	3
2. Enhancing Wildlife Protection and Developme nt	Reduction in illegal activities	Percentag e (%)	69	90	70	72	74	78	80	82	85	87	89	90
	Protected areas free from man-made pressures	Percentag e (%)	70	90	72	74	76	78	80	82	85	87	89	90

	Increased disaster prevention and control readiness	Percentage (%)	51	80	55	60	65	68	70	73	75	77	79	80
	Reduced conflict between wildlife and humans	Percentage (%)	65	90	68	71	73	76	79	83	85	87	88	90
	Increased coverage of wildlife protected areas	Percentage (%)	8.6	14.0	8.9	9.6	9.7	9.8	10.4	11.7	12.1	12.8	13.8	14.0
	Coverage of recovered and enriched wildlife and their habitats	Percentage (%)	51	80	53	56	59	62	65	68	71	77	77	80
	Increased wildlife infrastructure coverage	Percentage (%)	40	80	44	47	50	55	58	60	65	70	75	80
	Increased wildlife health service coverage	Percentage (%)	51	100	55	60	65	68	70	73	75	77	89	100
10. Expanding Sector Investment	Finance supply system established for those engaged in the sector (especially new entrants)	Number	0	1	-	1	-	-	-	-	-	-	-	-
	System designed to make land supply accessible in cities and areas where sector infrastructure is not expanded	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Destination development investment projects carried out in natural	Number	0	15	1	2	3	1	1	1	3	3	-	-

	resource and park areas in coordination with private investors													
	Incentive system established for investors engaged in the sector	Number	0	4	-	4	-	-	-	-	-	-	-	-
	Establishing a streamlined input supply (credit and land) system for investors engaged in infrastructure-lagging areas	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Investors engaged in foreign and domestic tourism investments (Lodge, Hotel, Restaurant)	Number	0	70 (20 Foreign, 50 Local)	7	7	7	7	7	7	7	7	7	7
	Coordination activities to enable chain hotel and destination development investors to enter via FDI and invest	Number	0	20	2	2	2	2	2	2	2	2	2	2
	Knowledge Management system established	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Tourism investment zones (clusters) created based on the diversity of tourism resources	Number	0	10	-	-	-	-	-	2	2	2	2	2

	Investment projects on selected tourist destinations for domestic and foreign investors	Number	2	22	2	2	2	2	2	2	2	2	2	2
	Tourism destination investment promotion Handbook prepared	Number	0	10	1	1	1	1	1	1	1	1	1	1
	Annual Tourism Investment Forum conducted with government officials, media, and stakeholders	Number	0	10	1	1	1	1	1	1	1	1	1	1
	Tourism Infrastructure Strategy prepared	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Investment Strategy prepared for those engaging in the tourism sector	Number	0	1	-	1	-	-	-	-	-	-	-	-
11. Modernizing and Improving Sector Service Delivery through Technology	Number of tourist service provider institutions with improved service delivery quality	Number	1,348	2,696	1,482	1,616	1,750	1,884	2,018	2,152	2,286	2,420	2,554	2,696
	Visitor satisfaction rate	Percentage (%)	50%	75%	52.5	55	57.5	60	62.5	65	67.5	70	72.5	75
	Certification and annual award	Number	0	1	-	1	-	-	-	-	-	-	-	-

	program for entities in guiding services (Drivers, Guides, Agents, Scouts)													
	System designed to build Tour Operator capacity, establish monitoring, and implement Quality Management in the private sector	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Established system for standardization and annual quality control of Films, Theaters, Museums, Libraries, and Cultural institutions	Number	0	10	1	1	1	1	1	1	1	1	1	1
	Bi-annual consultation forums for sector service providers implementing COVID-19 health control systems	Number	0	40	4	4	4	4	4	4	4	4	4	4
	Food preparation training provided based on visitor demand	Number	0	3	3	3	3	3	3	3	3	3	3	3
	Certification program provided for professionals in Sport services, Museums, Libraries, Cultural institutions, Film, and Theater	Number	0	1	-	1	-	-	-	-	-	-	-	-

	Established and operational Tourist Security Police service	Number	0	12	-	-	-	-	-	-	-	6	-	6
	Technological service system enabling contact-free service delivery in the hospitality sector	Number	0	1	1	1	1	1	1	-	-	-	-	-
	Strategy designed to withstand man-made and natural disasters and periods of crisis in the sectors	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Program designed and implemented to ensure transport safety and tour operators' competence	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Operational procedure implemented to improve tourist safety and handling	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Health posts established to ensure tourist health in destination areas	Number	0	30	3	3	3	3	3	3	3	3	3	3
	Tourist rest areas, toilets, and health posts built at 100km intervals along cross-country roads	Number	0	100	10	10	10	10	10	10	10	10	10	10

	Staff management and health protection monitoring and inspection standards implemented to improve tourism sector service delivery	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Strengthened capacity and superior service in urban tourism competitiveness	Number	0	38	3	5	5	5	5	3	5	5	3	2
	Certification program designed to ensure the continuity of professionals within the tourism industry	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Established national tourist safety monitoring system	Number	0	3	-	2	1	-	-	-	-	-	-	-
	Procedure established to strengthen smooth relations within the value chain	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Social tourism organizational system established by coordinating government and private entities	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Digital Tourism Strategy prepared	Number	0	2	-	1	1	-	-	-	-	-	-	-

	Tourism Dashboard prepared	Number	0	2	-	1	1	-	-	-	-	-	-	-
	Website developed and updated in coordination with regions to promote tourism attraction resources	Number	0	10	1	1	1	1	1	1	1	1	1	1
12. Developing Domestic Visiting Culture	Number of domestic tourists	Million	23.7	70	28.3	32.9	37.6	42.2	50.8	51.4	56.1	60.7	65.4	70.0
	System established to encourage tour operators selling marketing, promotion, and package tours for domestic tourism	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Package sales and promotion procedures established to encourage domestic visits for students, working youth, urban residents, civil servants, and private sector employees	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Procedures established to provide visiting opportunities for persons with disabilities, low-	Number	0	1	-	1	-	-	-	-	-	-	-	-

	income social groups, youth, and women													
	Strengthened social tourism organization by coordinating government and private entities to withstand the impact of COVID-19	Number	0	1	-	1	-	-	-	-	-	-	-	-
	System established to expand Solidarity Tourism to withstand the impact of COVID-19	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Operational system established to strengthen public ties through domestic tourism	Number	0	1	-	1	-	-	-	-	-	-	-	-
	"Land of Origins" campaign conducted to grow domestic tourism	Number	0	10	1	1	1	1	1	1	1	1	1	1
	Standard Guidebook prepared for domestic visitors	Number	0	5	-	1	1	1	1	1	-	-	-	-
13. Enhancing Destination and Attraction Developme nt	Developed new tourist destinations	Number	0	120	12	13	12	11	12	12	12	13	12	11

	Value additions to existing destinations	Number	0	107	10	11	11	11	11	10	12	11	10	10
	Destination Management Strategy prepared	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Established Destination Management Institution	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Policy and operational system established for government and private investors to work and support park administration and development collaboratively	Number	0	2	-	1	1	-	-	-	-	-	-	-
	Enabling conditions created for tourist-friendly infrastructure in parks and protected forests, including internal vehicle and pedestrian paths and necessary facilities	Number	0	14	2	2	2	2	2	2	2	-	-	-
	Operational system established to develop natural resources through Public-Private Partnerships (PPP)	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Activities for park development, arranging campsites,	Number	0	30	1	4	4	4	3	4	4	4	1	1

	fulfilling toilets and other necessities, and ensuring community benefit													
	Destination development plan and packaging system prepared (attracting new products, new countries, and generations)	Number	0	1	-	1	-	-	-	-	-	-	-	-
	System prepared to support and enhance tourism product diversification	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Cultural heritage tourism product packages prepared for the Middle East, Asia, Iran, and Turkey	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Tourism zone and corridor development strategy	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Policy and procedure prepared for government and private investors to work coordinately on park administration and development	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Locations where community tourism	Number	2	20	2	2	2	2	2	2	2	2	2	2

	programs have been designed and implemented													
	Programs designed and implemented to expand Cable, Mountain, Rural, Hot Springs, Nature, Community, and Sport tourism	Number	0	30	3	3	3	3	3	3	3	3	3	3
	Number of international tourists	Million	0.85	7.3	1.49	2.14	2.78	3.43	4.07	4.7	5.4	6.0	6.7	7.3
	Brands prepared for destination sites, cities, and regions	Number	0	44	4	4	6	6	4	6	6	4	4	-
	Inclusive tourism system established	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Resort city establishment strategy prepared	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Water tourism development strategy prepared	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Operational system established for waterfront tourism development	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Promotion and market development carried out to develop medical destination sites	Number	0	1	-	1	-	-	-	-	-	-	-	-
	System prepared to conduct mountain	Number	0	1	-	-	-	-	-	-	-	-	-	1

	sports racing with famous athletes													
	Mountain races conducted at selected sites	Number	0	4	-	-	-	-	-	1	1	1	1	-
	Site prepared for horse racing to expand sports tourism	Number	0	1	-	-	1	-	-	-	-	-	-	-
	System established to prepare site designs, boundaries, and proclamations for natural and cultural heritage tourist destinations	Number	0	1	-	1	-	-	-	-	-	-	-	-
14. Enhancing Tourism Marketing and Promotion	Expanded tourist market countries from North America, UK, Italy, and Germany to other European countries, India, Brazil, Mexico, Middle East, Scandinavia, Russia, Far East, and Turkey	Number	4	12	-	-	2	-	2	-	2	-	2	-
	Established procedure and organization to collect and analyze tourism market information from the global market	Number	0	1	-	1	-	-	-	-	-	-	-	-

	Designed domestic market and promotion program	Number	0	1	-	1	-	-	-	-	-	-	-	-
	One Africa Carnival conducted by Tourism Ethiopia	Number	0	2	-	-	-	-	-	1	-	1	-	-
	System prepared for tourism market innovation and new ideas	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Sales of prepared packages and development of rural, mountain, sport, cultural, agricultural, and nature tourism products in various areas	Number	0	20	2	2	2	2	2	2	2	2	2	2
	International films produced in Ethiopia	Number	0	5	-	-	1	1	1	1	1	-	-	-
	International Association Meetings successfully attracted to Ethiopia	Number	15	45	16	18	20	22	25	28	35	38	40	45
	System prepared for the Diaspora to engage in the promotion of national products	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Tourism Fund established for national tourism	Number	0	1	-	1	-	-	-	-	-	-	-	-

	promotion and marketing													
	International trade fairs participated in annually at selected venues	Number	0	20	2	2	2	2	2	2	2	2	2	2
	Familiarization trips and Business-to-Business (B2B) forums conducted	Number	0	5	-	1	1	1	1	1	-	-	-	-
	Increasing global market reach by opening marketing offices in major world countries to promote Ethiopia	Number	0	3	-	-	1	-	1	-	1	-	-	-
	Africa Carnival in which 55 African countries participated	Number	0	10	1	1	1	1	1	1	1	1	1	1
	Procedures established to perform market and B2B work to create clear market partnerships between government and private sectors	Number	0	100	10	10	10	10	10	10	10	10	10	10
	Conferences helping to strengthen focus given to regional and continental markets in market and tourism products	Number	0	4	-	1	1	1	1	-	-	-	-	-

	Promotion works helping to strengthen market segmentation and prioritization for domestic, international, continental, and regional levels	Number	0	10	10	10	10	10	10	10	10	10	10	10
	Online and digital marketing system established	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Procedures prepared for special visa and airport entry for VIP visitors	Number	0	1	-	1	-	-	-	-	-	-	-	-
	"My Home Ethiopia" campaign prepared for regional countries	Number	0	1	-	1	-	-	-	-	-	-	-	-
	"My Origin Ethiopia" campaign prepared for Africans	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Established Convention Center	Number	0	5	1	1	1	1	1	-	-	-	-	-
	National tourism exhibitions prepared	Number	0	10	-	2	2	2	2	2	-	-	-	-
	Support provided for the establishment of tourism enterprises	Number	0	20	2	2	2	2	2	2	2	2	2	2
	"Land of Origins" promotion activities carried out through Ethiopian embassies	Number	0	66	10	10	10	10	10	10	2	2	1	1

	Advertisements produced in various languages to promote "Land of Origins"	Number	4	24	2	2	2	2	2	2	2	2	2	2
	New packages prepared to promote major attractions and grow "Stop Over" tourism	Number	0	40	4	4	4	4	4	4	4	4	4	4
	"Land of Origins" promotions conducted at various meetings and events held within the country	Number	0	200	20	20	20	20	20	20	20	20	20	20
	Packages prepared to extend tourist stay by linking Addis Ababa with cities within a two-hour radius	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Packages prepared to develop 13 parks and 4 natural protected forests as "Must See" zones for international and domestic visitors	Number	0	1	-	1	-	-	-	-	-	-	-	-
	"Journey to the First Land of Refuge" Al-Nejashi travel tourism product package prepared	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Promotional and marketing packages	Number	0	1	-	1	-	-	-	-	-	-	-	-

	prepared for Hot Springs and Traditional Medicine (Medical Tourism)													
	Promotional films prepared to make Ethiopia an international destination for Sports Tourism	Number	0	4	-	-	1	1	1	1	-	-	-	-
	Promotional package prepared to introduce tourism products of the Grand Ethiopian Renaissance Dam (GERD)	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Tourism's share of Total Gross Domestic Product (GDP)	Percentage (%)	6.1	10	6.3	6.7	7.0	7.5	8.0	8.3	8.6	9.0	9.5	10
	Visitor expenditure per day in US Dollars	USD	228	158.5	216.2	197.0	193.6	181	179.4	169.7	168.3	159.4	158.9	158.5
	Average length of tourist stay	Days	16	20	16	17	17	18	18	19	19	20	20	20
	Increased occupancy rate of hospitality institutions	Percentage (%)	65	85	67	69	71	73	75	77	79	81	83	85
22. Strengthening Sector Information and IT	Technologies and applications helping to make tourism services contactless	Number	0	8	1	2	1	1	1	2	-	-	-	-

Usage/Data Collection, Handling, and Dissemination														
	New technological outputs put into use (TSA, CSA, SSA, Digital)	Number	3	11	4	6	8	10	11	-	-	-	-	-
	(Cont.) Marketing, digital tourist travel info system, tourist payment system, Int'l sport technology, and HRD database	-	-	-	-	-	-	-	-	-	-	-	-	-
	Toll-free call centers in the sector	Number	1	13	2	3	2	3	1	1	-	-	-	-
	Automation work performed to support the tourist payment system with technology	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Sectoral monitoring, control, and support system established following international standards	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Unified planning and reporting system established in the sector from Kebele to Federal levels	Number	0	1	-	1	-	-	-	-	-	-	-	-

	Tourism market intelligence data collected and analyzed for selected country markets	Number	0	20	2	2	2	2	2	2	2	2	2	2
	International market data collected and analyzed for the tourism and cultural industry	Number	0	20	2	2	2	2	2	2	2	2	2	2
	Knowledge Management organization and system established	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Increased technology utilization in the sector	Percentage (%)	30	75	25	30	35	40	45	50	55	60	65	75
	Increased data handling and utilization in the sector	Percentage (%)	51	100	55	60	65	70	75	80	85	90	95	100
23. Strengthening Sectoral Study and Research Works	Conducted study and research works	Number	139	282	30	28	28	28	28	28	28	28	28	28
	Study and research works put into practice	Number	134	480	43	49	48	48	48	49	48	49	49	49
	Published and accessible study and research works	Number	104	156	14	15	15	15	15	16	16	16	17	17

	Establishing a system to rescue parks and lakes identified as being at risk through the cooperation of the four economic actors	Number	0	6	-	2	2	2	-	-	-	-	-	-
	System established to enable 10 study and research institutions and 8 NGOs to contribute to destination development	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Prepared research publications and annual journals	Number	0	10	1	1	1	1	1	1	1	1	1	1
	Studies conducted regarding MICE (Meetings, Incentives, Conferences, and Exhibitions) tourism	Number	0	10	-	2	2	1	1	1	1	1	1	-
	MICE tourism strategy prepared	Number	0	1	-	1	-	-	-	-	-	-	-	-
24. Strengthening Sectoral Education and Training System	Preparing a clear strategy for human resource development in the tourism sector and a procedure to link training with industry growth	Number	0	2	-	1	1	-	-	-	-	-	-	-
	Program designed to increase tourism	Number	0	1	-	1	-	-	-	-	-	-	-	-

	education within the community													
	Tourism awareness programs broadcast once a week on mass media	Number	0	520	52	52	52	52	52	52	52	52	52	52
	Education and training program designed to empower professionals	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Individuals trained in various professions in tourism, heritage conservation, and wildlife sectors	Number	32,944	67,910	36,444	39,940	43,436	46,932	50,428	53,924	57,420	60,916	64,412	67,910
	Improved sectoral curriculum (incorporating Digital Marketing into the curriculum)	Document	0	1	-	1	-	-	-	-	-	-	-	-
	Capacity building training provided for stakeholders in the MICE value chain	Number	0	40	4	4	4	4	4	4	4	4	4	4
	National tourism skills audit, curriculum review, and capacity building program implemented	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Partnerships established with 10 renowned	Number	1	11	-	2	2	2	2	2	-	-	-	-

	international hotel and tourism educational institutions													
	Program to train, consult, and empower tourism professionals in 50 tourism destination cities	Number	0	50 Cities	6	6	6	6	6	6	6	6	6	6
	Training program established for sectoral leaders from Federal to lower administrative levels	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Center opened in the field of nature tourism and wildlife education training	Number	2	1*	-	1	-	-	-	-	-	-	-	-
	Program designed to raise awareness on the preservation of cultural and natural tourist destinations	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Coverage of trained human resources in the tourism sector	Percentage (%)	23	59	25	28	30	33	38	43	48	53	58	59
25. Excelling Sectoral Institutional Building	Sectoral transformation implemented based on studies	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Support program designed and implemented for	Number	0	1	-	1	-	-	-	-	-	-	-	-

	regions and zones requiring special assistance													
	Established institution for sectoral research and human resource development	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Various operational frameworks prepared (details in the two tables below)	Number	-	62	15	15	15	17	-	-	-	-	-	-
	Increased sector execution and enforcement capacity	Percentage (%)	60	80	62	64	66	68	70	72	74	76	76	78
	Strong monitoring, evaluation, and control operational system organized and implemented	Number	0	1	-	1	-	-	-	-	-	-	-	-
26. Strengthening Coordination, Partnership, and Diplomacy	Conventions and tripartite relations signed and accepted by the country	Number	5	10	1	1	1	1	1	-	-	-	-	-
	System established to repair heritages through cooperation between the four economic actors and heritage owners	Number	0	1	-	1	-	-	-	-	-	-	-	-

	Bilateral agreements signed by the country	Number	50	100	55	60	65	70	75	80	85	90	95	100
	Sectoral communication strategy and operational system established	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Procedure established to enable research institutions and NGOs to contribute to the development of destinations (Parks, Lakes, Forests, Mountains, Waterfalls)	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Partnerships/Agreements with tourism entities from ten countries	Number	0	10	2	2	2	2	2	-	-	-	-	-
	Fam trips prepared by holding conferences and signing MoUs with tourism/tour operator associations from ten countries	Number	0	-	-	-	-	-	-	-	-	-	-	-
	Operational system established between Ministry, Civil Aviation, Tourism Ethiopia, Ministry of Health, Hotel Associations, and	Number	0	1	-	1	-	-	-	-	-	-	-	-

	Ethiopian Airlines to monitor and respond to tourists and sector employees													
	Additional financial sources obtained for tourism development from non-governmental sources by strengthening communication and resource mobilization	Number	0	6	-	2	2	1	1	-	-	-	-	-
	Strategy prepared to maintain and repair heritages using internal capacity by coordinating indigenous knowledge, expertise, and investors	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Prepared development project proposals and partnership forums	Number	3	33	3	3	3	3	3	3	3	3	3	3
	System established in coordination with relevant bodies to expand Medical Tourism	Number	0	1	-	1	-	-	-	-	-	-	-	-
27. Increasing Community Participatio	Jobs created in the tourism sector	Number	1.5M	2.0M	200k	200k	200k	200k	200k	200k	200k	200k	200k	200k

n, Income, and Job Creation														
	Revenue from tourism (in Billion USD)	USD	3.17	23.15	5.168	7.166	9.164	11.16	13.16	15.15	17.15	19.15	21.15	23.15
	People who have gained awareness	Number	-	30M	1M	2M	4M	6M	10M	14M	18M	22M	24M	30M
28. Improving Sector Communication and Image Building	Organized recording studio	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Incentive system for micro and small enterprises and individuals bringing new ideas to the sector	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Promotional work done on five international media outlets to mitigate the impact of COVID-19 on the tourism sector	Productions	0	20	4	4	5	5	2	-	-	-	-	-
	Weekly 30-minute tourism product TV programs on domestic media	Number	52	1,040	104	104	104	104	104	104	104	104	104	104
	Weekly 30-minute tourism product	Number	0	520	52	52	52	52	52	52	52	52	52	52

	radio programs on domestic media													
	Operational system established to create new working relationships with media and forums working in the tourism sector	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Agreements and operational systems made with tour operator associations, mainstream, and social media in ten countries	Outreach	0	1	-	1	-	-	-	-	-	-	-	-
	International social media campaigns (Twitter, YouTube, Facebook, etc.) to stimulate the tourism sector	Reach	0	40M	8M	8M	8M	8M	8M	-	-	-	-	-
	Prepared, revised, and implemented event calendar	Number	0	10	1	1	1	1	1	1	1	1	1	1
29. Ensuring Sustainable Development and Increasing Youth/Women Participation	Seedlings planted and cared for	Number	50k	100M	10M	10M	10M	10M	10M	10M	10M	10M	10M	10M

	Women and youth participating in the sector and benefiting from job opportunities	Number	1.15M	2.47M	247k	247k	247k	247k	247k	247k	247k	247k	247k	247k
	Women participating in the sector and benefiting from job opportunities	Number	658k	1.41M	141k	141k	141k	141k	141k	141k	141k	141k	141k	141k
	Management plan and guidelines prepared for the protection of cultural and natural tourist destinations in coordination with relevant bodies	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Sustainable tourism strategy prepared for 13 parks and 4 protected forests	Number	0	1	-	1	-	-	-	-	-	-	-	-
	(Continued) Destination sites in protected forests	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Liquid waste disposal system prepared in parks	Number	0	1	-	1	-	-	-	-	-	-	-	-
	Increased contribution to climate change resilience	Percentage (%)	51	80	53	55	58	60	64	68	72	76	78	80
	Increased carbon sequestration	Million (Tons)	238	387	246	265	268	271	287	324	335	354	381	387

	(storage) in protected areas													

Appendix 2: Assumptions.

Focus Area	Goal	Assumptions
Enhancing Heritage Conservation and Protection	**Increasing Heritage Care and Protection**	* Taking into account that nine world heritage sites have been designated at the national level, the goal is to ensure that one heritage site is designated as a strictly protected site annually for protection and development. This will be achieved by establishing a continuous management system that integrates the community, stakeholders, and the private sector. * Based on shared Ethiopian values—such as the coffee ceremony, the process of making Injera, the preparation of Enset, the making of parchment (Birana) books, and traditional farming processes—the goal involves the participation of relevant experts, institutions, and the owning community. * Recognizing the current lack of a representative ethnographic heritage collection with complete national data, the goal is to collect and study 850 heritage items through purchase, loan, gift, and coordination with regions/owners for exhibition and research purposes. * Leveraging the existence of numerous ancient resources in the country that have the potential to be recognized as written heritages at both national and international levels. * Acknowledging that the maintenance of internationally and nationally registered heritages requires high expertise, long durations, and a significant budget, the strategy assumes the establishment of a Heritage Protection and Development Fund and the coordination of international partnerships while strengthening the skills of government and private actors. * Identifying collections currently in laboratories with high historical, scientific, and artistic value to be protected at the national level, organizing their data using modern methods for research and tourism. This assumes the Central Heritage Database System will become operational.

		* Data indicates there are over 150 museums and heritage collection centers nationwide; however, since there is only one fully organized National Museum, the plan assumes there are collections capable of being reorganized into national-level museums. * Managing the country's world-registered heritages according to international management standards, ensuring conservation work is harmonized with development. This involves preparing site plans for infrastructure to make heritages accessible. This project assumes a requirement of 5 million ETB per site annually (50 million ETB over five years). * As the Federal Authority focuses on heritages of national significance and shared values, the goal assumes coordinating the registration and collection of movable heritages found in regions and the potential for developing museums at the Regional, Zone, and Woreda levels.
Expanding Sector Investment for Competitive Tourism	**Expanding Investment in the Sector**	* Tourism policies, strategies, and studies will be fully implemented. * It is assumed that an investment incentive system for the culture and sports sectors will be established. * The government will prioritize the tourism sector, and the established incentive system will be strengthened and sustained. * There is an abundance of diverse attraction resources that, if supported by critical infrastructure, can be developed to join the market and satisfy global demand. * Policy focus has been given to increasing the quality, type, and volume of tourist services. * The existence of attractions that are vital for tourism development and capable of meeting market needs is a core assumption.
Sector Investment & Growth	**Expanding Investment & Participation**	* International tourism will show continuous growth over the next ten years, leading to an increase in tourist numbers. * Global brand hotels will continue to make our country a preferred destination for investment. * The government will make the economy more conducive for the private sector than ever before.

Modernizing Service Delivery	**Modernizing and Improving Sector Services through Technology**	* Seven technology products designed to modernize and improve operations will be implemented. * Tourism policies, strategies, and research findings will be put into practice. * Operational systems will be implemented to solve existing procedural problems in the sector. * The grading system for tourist service providers will be expanded, and the number of institutions meeting international standards will increase. * An international-standard classification system will be established and fully implemented. * Current organizational consistency issues will be resolved, strengthening institutional execution capacity.
Domestic Tourism	**Developing a Culture of Domestic Visiting**	* Schools, government institutions, and NGOs will be organized into travel circles/clubs. * As tourism products and destinations increase and become more inclusive, the number of domestic tourists will rise. * The government and sector actors will implement an incentive system for domestic tourism. * Tour operators will give significantly more attention to domestic travel packages. * Media institutions will provide sustainable coverage for domestic tourism. * Social media and print materials will be utilized for awareness creation. * National internal peace and stability will be maintained. * A large middle-income society will emerge. * Efforts to develop a culture of leisure travel will be successful. * The demographic profile of the country, which is dominated by youth, provides a strong base for travel.

Destination Development	**Enhancing Destination and Attraction Development**	* Policies and guidelines will support development. * Collaborative efforts between government and private investors will lead to the development of key attractions and destinations. * As general community infrastructure expands, specific tourism infrastructure will also grow. * New tourist destination development plans and management strategies will be prepared. * The existing abundance of natural and cultural resources provides a solid foundation for creating new products. * Horizontal and contextual coordination among government bodies from top to bottom will be strengthened. * Government infrastructure expansion projects will continue to intensify. * The quantity and quality of human resources required for the sector will increase. * Continuous awareness creation and capacity-building activities will be conducted. * Conservation and protection of attraction sites will be strengthened.
Marketing and Promotion	**Enhancing Tourism Marketing and Promotion**	* Tourism representative offices will be opened in foreign countries to represent Ethiopia. * Internal peace and stability in the country will continue to improve. * Promotional activities supported by digital marketing and other technologies will be strengthened. * Cooperative market partnerships will be strengthened with domestic stakeholders and international counterparts. * The overall attractiveness of tourism destinations and attraction sites will increase. * Tourism products based on international market trends will be expanded.

Information System Excellence	**Strengthening Sector Information and IT Usage/Data Collection and Management**	* Existence of valuable information and technological outputs in the tourism sector. * Operational systems focusing on data collection, utilization, and implementation will be established. * Modern planning, monitoring, and reporting systems will be implemented. * Efforts will be made to support service delivery with modern technology.
Institutional Building	**Strengthening Sectoral Study and Research Works**	* It is legally mandated to organize seminars, symposiums, and workshops on major and current issues, research results, and new ideas in collaboration with relevant stakeholders. * The expansion and increasing number of higher education institutions.
	Strengthening the Sectoral Education and Training System	* High capacity and increasing number of higher education institutions. * Implementation of extensive training programs for sectoral executors. * A professional competency assessment system will be established to create a competent and competitive workforce. * The growing number of institutions providing training in hotel and tourism will help produce a large workforce. * Frameworks, guidelines, and standards will be prepared to strengthen the use of trained human resources by sector institutions.
	Excelling Sectoral Institutional Building	* Systems will be established to enhance the execution and enforcement capacity within the sector. * Policy and strategy revisions will be conducted. * Organizational structure improvements and reforms will be carried out.
Community Connection, Benefit, and Partnership	**Strengthening Coordination, Partnership, and Diplomacy**	* Agreements will be made between government executive bodies, academic institutions, and the private sector.

	(Role of the Four Actors)	* Memorandums of Understanding (MoUs) will be signed with various countries and international organizations. * Systems will be established to strengthen professional associations and organizations operating in the sector.
	Increasing Revenue and Job Creation in the Sector	* Existence of a workforce of tens of millions ready for employment. * Ethiopia's potential to be among the leading tourist destinations in the coming years. * Systems will be established to utilize the potential of the culture, tourism, and sports sectors, which can create large-scale employment opportunities.
	Excelling Sector Public Relations and Communication	* New promotion and market development options are becoming available through digital media. * The increasing influence of media and communication. * The sector is full of diverse events and activities. * Recognition of the significant role media and communication play in building the country's image.
Expanding Competitive Tourism Sector Investment	**Expanding Investment in the Sector**	* Tourism policies, strategies, and research findings will be fully implemented. * An investment incentive system for the culture and sports sectors will be established. * The government will continue to prioritize the tourism sector and strengthen its incentive systems. * There is an abundance of diverse attraction resources that, if supported by critical infrastructure, can be developed to join the market and meet global demand. * Policy focus will be maintained on improving the quality, type, and volume of tourist services. * Essential attractions for tourism development that meet market needs are available.

		* International tourism will show steady growth over the next decade, leading to an increase in tourist arrivals. * Global brand hotels will continue to make Ethiopia a preferred destination for investment. * The government will make the economy more conducive for private investors than ever before.
Modernizing and Improving Service Delivery	**Service Modernization through Technology**	* Ten technology products designed to modernize and improve operations will be implemented. * Tourism policies, strategies, and studies will be put into practice. * Solutions for operational problems observed in the sector will be implemented. * The grading system for tourist service providers will be expanded, and the number of institutions meeting international standards will increase. * An international-standard classification system will be fully established and implemented. * Organizational consistency issues in the sector will be resolved, strengthening institutional execution capacity.
Developing a Culture of Domestic Tourism	**Growing the Culture of Local Visiting**	* Schools, government institutions, and NGOs will be organized into travel clubs/circles. * As tourism products and destinations increase and become more inclusive, the number of domestic tourists will rise. * The government and sector actors will implement incentive systems for domestic tourism. * Tour operators will give significantly more attention to domestic travel packages. * Media institutions will provide sustainable coverage of domestic tourism. * Various social media platforms and publications will be used for awareness creation.

		* National internal peace and stability will be maintained. * A large middle-income class will emerge. * Systematic efforts to develop a culture of travel will be successful. * The population's demographic distribution (predominantly youth) will support sector growth.
Enhancing Destination and Attraction Development	**Developing Destinations and Attractions**	* Policies and guidelines will be effectively utilized. * Collaborative efforts between the government and private investors will lead to the development of key attractions and destinations. * As general community infrastructure expands, specific tourism infrastructure will also grow. * New tourist destination development plans and management strategies will be prepared. * The existing abundance of natural and cultural resources provides a solid foundation for creating new products. * Horizontal and cross-sectoral coordination among government bodies from federal to local levels will be strengthened. * Government infrastructure expansion projects will continue with intensity. * The quantity and quality of human resources required for the sector will increase. * Continuous awareness creation and capacity-building activities will be conducted. * Current organizational consistency issues will be resolved to boost institutional capacity. * Conservation and protection of attraction sites will be strengthened.
Marketing and Promotion	**Enhancing Tourism**	* International tourism representative offices for Ethiopia will be opened abroad.

	Marketing and Promotion	* Domestic peace and stability will significantly improve. * Promotional activities supported by digital marketing and advanced technology will be intensified. * Market cooperation will be strengthened with domestic stakeholders and international counterparts. * The overall attractiveness of tourism destinations and attraction sites will increase. * Tourism products designed for the international market will be expanded.
Information Systems Excellence	**Strengthening Sector Information and IT Usage/Data Management**	* Existence of valuable information and technological outputs in the culture, sports, and tourism sectors. * Operational systems focusing on data collection, utilization, and implementation will be established. * Modern planning, monitoring, and reporting systems will be put into practice. * Deliberate efforts will be made to support service delivery through modern technology.
Institutional Building	**Strengthening Sectoral Study and Research Works**	* Organizing seminars, symposiums, and workshops on major/current issues, research results, and new ideas is legally mandated as a core responsibility. * The number of higher education institutions continues to expand.
	Strengthening the Sectoral Education and Training System	* High capacity and increasing number of higher education institutions are available. * Extensive training programs for sectoral executors will be implemented. * A professional competency assessment system will be established to create a competent and competitive workforce. * The proliferation of institutions providing training in hotels and tourism will help produce a large volume of skilled labor. * Frameworks, guidelines, and standards will be prepared to strengthen the utilization of trained personnel by sector institutions.

	Excelling Sectoral Institutional Building	* Systems will be established to enhance the execution and enforcement capacity within the sector. * Periodic policy and strategy revisions will be conducted. * Organizational structure improvements and reforms will be carried out.
Coordination and Partnership	**Strengthening Coordination, Partnership, and Diplomacy (Role of the Four Actors)**	* Agreements will be forged between government executive bodies, academic institutions, and the private sector. * Memorandums of Understanding (MoUs) will be signed with various countries and international organizations. * Systems will be established to strengthen professional associations and organizations operating in the sector.
Economic Impact	**Increasing Revenue and Job Creation in the Sector**	* Availability of a workforce numbering in the tens of millions ready for employment. * Ethiopia's potential to remain among the leading tourism destinations in the coming years. * Systems will be established to leverage the capacity of the culture, tourism, and sports sectors for large-scale job creation.
Public Relations	**Improving Sector Communication and Image Building**	* New promotion and market development options will be delivered via digital media. * The influence of media and communication will continue to grow. * The sector is rich with diverse events and activities. * Recognition of the critical role media and communication play in building the country's image.
Ensuring Sustainable Sector Development	**Increasing Youth and Women's Participation**	* The government’s high priority and commitment to the Green Legacy (Areguade Ashara) initiative. * Favorable conditions created by policies and strategies specifically aimed at the empowerment and benefit of women and youth.

	and Equitable Benefit	* Successful track records and lessons learned from development works carried out in new tourist destinations. * The presence of committed leadership focused on large-scale job creation and economic inclusion.

Appendix 3: Projects to be implemented in the Ten-Year Tourism Development Plan

No.	Project Name	Project Owner	Location	Start Year	End Year	Budget (Million ETB)
1	Axum Obelisk Maintenance Project (No. 3)	Heritage Conservation Authority	Axum	2012	2013	102,000,000
2	Lalibela Churches Heritage Conservation	Heritage Conservation Authority	Lalibela	2012	2014	600,000,000
3	Digital Resource Mapping & Destination Database	Fed. & Reg. Tourism Institutions	All Regions	2012	2015	200,000,000
Total						**902,000,000**
No.	Project Name	Project Owner	Location	Start Year	End Year	**Budget (ETB)**
1	Ministry's Main Headquarters Building Construction	Ministry of Tourism	Addis Ababa	2014	2020	**2,000,000,000**
2	Wildlife Conservation Authority HQ Building	Wildlife Conservation Authority	Addis Ababa	2017	2021	**3,000,000**

3	Construction of Tourist Information Centers	Ministry of Tourism	Selected Sites	2014	2017	**100,000,000**
4	Tourism Satellite Account (TSA)	Ministry of Tourism	Addis Ababa	2014	2017	**9,000,000**
5	Smart Destinations Project	Ministry of Tourism	Selected Sites	2014	2018	**1,000,000,000**
6	Model Hotel & Tourism Training Project	Ministry of Tourism	Addis Ababa	2013	2020	**2,000,000,000**
7	Establishment of Destination Management Institute	Ministry of Tourism	Addis Ababa	2013	2014	**100,000,000**
8	Construction of 59 New Destinations	Ministry of Tourism	Regions	2014	2021	**3,000,000,000**
9	Value Addition at 40 Existing Destinations	Ministry of Tourism	Regions	2014	2022	**1,000,000,000**
10	Establishment of 18 Community Tourism Sites	Ministry of Tourism	Regions	2016	2022	**36,000,000**
11	Establishing Tourist Health Clinics in 30 Sites	Ministry & Regional Bureaus	Destinations	2016	2020	**90,000,000**
12	One National Museum in A.A. & 6 Regional Museums	Heritage Conservation Authority	A.A. & Regions	2015	2022	**4,500,000,000**
13	National Exhibition & Convention Center	Ministry of Tourism	Addis Ababa	2014	2020	**1,200,000,000**
14	Cradle of Mankind Museum Construction	Heritage Conservation Authority	Addis Ababa	2013	2015	**1,200,000,000**

15	Lucy Memorial Museum	Heritage Conservation Authority	Afar	2013	2014	**20,000,000**
16	Gondar (Fasil Ghebbi) Maintenance	Heritage Conservation Authority	Amhara Region	2013	2015	**200,000,000**
17	Adwa Museum	Heritage Conservation Authority	Tigray	2014	2020	**2,000,000,000**
Total						**16,131,000,000**

Appendix 4: Human Resource Requirements for the Ten-Year Tourism Development Plan by Education Level and Professional Field

Education Level / Qualification	**2012 Baseline**	**2013**	**2014**	**2015**	**2016**	**2017**	**2018**	**2019**	**2020**	**2021**	**2022**	**10-Year Total (2013-2022)**
General & Academic Education												
Basic Literacy (Academic)	24	2	2	2	2	-	2	-	-	-	-	10
Grade 4 Completed	747	70	59	25	28	37	36	41	46	49	60	361
Grade 8 Completed	1,467	133	123	55	38	26	31	35	40	46	52	379
Grade 10 Completed	1,738	267	261	70	66	62	43	42	52	58	65	549
Preparatory (Grade 12)	1,787	89	82	16	20	25	30	35	40	45	50	281
Technical & Vocational (TVET)												

Level 1	408	36	34	11	11	12	13	15	16	18	20	138
Level 2	539	74	71	20	16	12	13	14	16	18	20	181
Level 3	983	81	95	37	41	45	52	57	64	72	80	510
Level 4	193	102	105	41	48	45	42	41	38	35	32	415
Level 5	96	18	22	2	3	4	5	6	8	10	11	51
College Diploma												
College Diploma (Type A)	-	19	21	23	-	-	-	-	-	-	-	-
College Diploma (Type B)	29	8	1	-	-	-	-	-	-	-	-	-
College Diploma (General)	1,423	17	18	1	1	-	-	-	-	-	-	4
College Diploma (Specialized)	-	1	1	1	14	1	1	1	1	1	1	23
Natural Science / Technical Fields	-	2	2	2	2	2	2	2	2	2	2	20
Building Electrician	15	1	1	1	1	1	1	-	-	-	-	6
Building Construction	13	25	32	-	-	-	-	-	-	-	-	57
Electrician	16	6	7	-	-	-	-	-	-	-	-	13
Computer Science	24	7	10	-	-	-	-	-	-	-	-	17
Auto Mechanic	10	20	21	-	-	-	-	-	-	-	-	41
Engineering / Architecture	21	0	0	-	-	-	-	-	-	-	-	0
Nurse	245	213	3	-	-	-	-	-	-	-	-	216
ICT	239	80	84	16	17	20	22	24	2	26	27	177
Laboratory Technician	80	0	1	1	1	1	1	1	1	1	1	10

Pharmacy Technician	123	2	2	2	2	2	2	2	2	2	2	20
Social Science / Professional Fields	-	2	2	2	2	2	2	2	2	2	2	20
Accounting	416	45	44	1	1	1	1	1	1	1	1	10
Geography	28	22	38	-	-	-	-	-	-	-	-	60
History	25	2	2	-	-	-	-	-	-	-	-	4
Languages	49	49	22	1	-	-	-	-	-	-	-	3
Marketing	19	11	9	1	1	1	1	1	1	1	1	10
Economics	138	12	14	1	1	1	1	1	1	1	1	10
Secretarial & Office Admin	353	52	63	3	3	3	3	3	3	3	3	30
Law	2	1	1	2	2	2	2	2	2	2	2	20
Public Administration	5	1	1	3	3	3	3	3	3	3	3	30
Management	158	22	18	2	2	2	2	2	2	2	2	20
Library Science	17	24	38	1	1	1	1	1	1	1	1	10
Tourism Management	27	2	2	4	4	4	4	4	4	4	4	40
Hotel Management	12	23	38	3	3	3	3	3	3	3	3	30
Eco-Tourism / Heritage Admin	3	2	2	1	1	1	1	1	1	1	1	10
Journalism & Communication	12	3	3	2	2	2	2	2	2	2	2	20
Mathematics & Int'l Law	1	1	1	2	2	2	2	2	2	2	2	20
Institutional Operations	1	1	1	1	1	1	1	1	1	1	1	10
Business Administration	8	2	2	1	1	1	1	1	1	1	1	10
Theology	2	1	1	1	1	1	-	-	-	-	-	5
Tour Guide	8	2	2	-	-	-	-	-	-	-	-	4

Rural Dev. & Family Science	1	1	1	29	38	47	56	65	74	83	92	515
Purchasing (Procurement)	120	10	23	-	-	-	-	-	-	-	-	33
First Degree (Bachelors)												
Natural Sciences												
Computer Science	25	33	45	-	-	-	-	-	-	-	-	78
Sport Science	899	7	5	-	-	-	-	-	-	-	-	12
ICT	180	0	1	-	-	-	-	-	-	-	-	1
Multicultural Studies	0	0	0	-	-	-	-	-	-	-	-	0
Ethiopian Cultural Studies	0	0	0	-	-	-	-	-	-	-	-	0
Social Sciences												
Economics	141	56	57	-	-	-	-	-	-	-	-	113
Accounting	232	29	31	-	-	-	-	-	-	-	-	60
Tourism Management	83	82	87	-	-	-	-	-	-	-	-	169
Hotel Management	31	47	56	-	-	-	-	-	-	-	-	103
Eco-Tourism / Heritage Admin	6	10	12	-	-	-	-	-	-	-	-	22
Fine Arts (Painting/Sculpture)	7	1	1	-	-	-	-	-	-	-	-	2
Rural Dev. & Family Science	1	1	1	-	-	-	-	-	-	-	-	2
Leadership / Management	75	75	75	-	-	-	-	-	-	-	-	150
Human Resource Development	112	0	3	-	-	-	-	-	-	-	-	3
Public Administration	116	2	0	-	-	-	-	-	-	-	-	2

Management (General)	152	2	0	-	-	-	-	-	-	-	-	2
Master's Degree	-	31	40	49	58	66	75	84	93	-	-	531
Natural Sciences	-	-	-	-	-	-	-	-	-	-	-	-
Social Sciences	-	-	-	-	-	-	-	-	-	-	-	-
Geography	8	1	2	-	-	-	-	-	-	-	-	3
Economics	10	0	0	-	-	-	-	-	-	-	-	0
Management	19	2	5	-	-	-	-	-	-	-	-	7
History	8	2	4	-	-	-	-	-	-	-	-	6
Marketing	3	6	6	-	-	-	-	-	-	-	-	12
Law	0	0	0	-	-	-	-	-	-	-	-	0
Accounting	35	1	0	3	3	3	2	1	2	2	1	25
Purchasing (Procurement)	10	2	0	-	-	-	-	-	-	-	-	2
PhD (Doctorate Degree)												
Natural Sciences / Professional Fields	-	482	511	548	593	638	687	739	780	858	-	5,837

Appendix 5: Human Resource Plan for the Ethiopian Wildlife Development and Conservation Authority (EWCA)

Education Level / Professional Field	Baseline Year (2012)	Projection by Location / Park													Total
		H. Office	Senkele	Gambela	Abijatta	Omo	Kafta	Simien	Babile	Bale	Nech Sar	Alatash	Haltash	Gerale	Yangudi
Bachelor's Degree	0														
Natural Science (BSc) / Professional Field	113	42	3	2	8	4	7	12	5	9	5	3	3	6	4
Social Science (BA) / Professional Field	91	39	4	2	12	3	4	6	2	1	5	3	3	4	3
Master's Degree (MSc)															
Natural Science / Professional Field	23	14	2	1	1	2	1	2							
Master's Degree (MA)															
Social Science / Professional Field	4	3			1										

PhD (Doctorate Degree)	1	1													
Social Science / Professional Field	0														
Grade 4 Completed	133	12	5	14	17	32	29	39	12	26	9	9	6	14	9
Grade 8 Completed	120	6	6	4	10	14	12	15	13	10	5	6	11	3	5
Grade 10 Completed	281	12	22	12	20	8	28	36	13	40	27	18	28	11	6
Preparatory (Grade 12)															
Grade 12 Completed	40	7	2	1	3	3	4	11	1	8					
TVET Graduates	0														
Level 1	27	5	2	3	5	1	3	4	2	2					
Level 2	19	3	1	1	2	3	2	3	1	1	1	1			
Level 3	37	8	4	2	1	7	2	4	5	1	1	2			
Level 4	77	5	7	4	6	2	2	13	3	1	11	7	12	1	3
Level 5	2		1	1											
College Diploma	46	16	3	6	3	5	2	3	3	1	2	1	1		
Natural Science / Professional Field	3	3													

Social Science / Professional Field	0														
Total Sum	**1,017**	**176**	**55**	**48**	**86**	**71**	**91**	**133**	**59**	**103**	**78**	**62**	**68**	**41**	**46**

Appendix 6: Financial Requirements and Sources of Funding for the Ten-Year Development Plan (in Millions of ETB)

No.	Description	Baseline Year (2012)	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	10-Year Total
1	**Total Expenditure (1.1 + 1.2)**	**7,129.2**	**9,153.6**	**10,334.0**	**8,827.5**	**9,126.1**	**25,032.5**	**20,875.7**	**16,311.7**	**15,055.7**	**14,077.0**	**13,153.5**	**100,522.4**
1.1	Capital Budget	6,657.9	8,469.5	9,587.9	8,007.9	8,228.6	24,049.3	19,766.3	15,061.4	13,611.4	12,406.4	11,204.3	**190,393.0***
1.2	Recurrent Expenditure	471.3	684.1	746.1	819.6	897.4	983.2	1,109.4	1,250.3	1,444.4	1,670.6	1,949.2	**11,554.3**
2	**Foreign Exchange Requirement (USD)**	**-**	**10M**	**15M**	**15M**	**15M**	**15M**	**15M**	**15M**	**15M**	**15M**	**15M**	**145,000,000**
3	**Funding Sources (3.1 to 3.5)**	**7,129.2**	**9,153.6**	**10,334.0**	**8,827.5**	**9,126.1**	**25,032.5**	**20,875.7**	**16,311.7**	**15,055.7**	**14,077.0**	**13,153.5**	**201,947.4**

3.1	Government Budget	1,799.2	1,834.5	2,134.7	1,535.8	1,552.0	6,810.8	5,271.9	3,637.2	3,101.9	2,645.7	2,187.8	**50,712.4**
3.2	Internal Revenue (e.g. State Enterprises)	-	-	-	-	-	-	-	-	-	-	-	-
3.3	Non-Govt Sector Investments	-	-	-	-	-	-	-	-	-	-	-	-
3.4	External Aid (Direct to Sector)	-	30.0	50.0	70.0	100.0	120.0	120.0	160.0	200.0	240.0	300.0	**1,640.0**
3.5	Loans (Direct Sector Borrowing)	**5,300.0**	**3,600.0**	**3,860.0**	**4,120.0**	**4,350.0**	**4,600.0**	**4,900.0**	**5,200.0**	**5,510.0**	**5,840.0**	**6,190.0**	**48,170.0**
3.5.1	External Loans	-	-	-	-	-	-	-	-	-	-	-	-
3.5.2	Domestic Loans (3.5.1.1 + 3.5.2.2)	5,300.0	3,600.0	3,860.0	4,120.0	4,350.0	4,600.0	4,900.0	5,200.0	5,510.0	5,840.0	6,190.0	**48,170.0**
3.5.1.1	From Private Banks	-	-	-	-	-	-	-	-	-	-	-	-
3.5.2.2	From Government Banks	-	-	-	-	-	-	-	-	-	-	-	-

Appendix 7: Financial Requirements and Sources of Funding for the Ethiopian Wildlife Development and Conservation Authority (in Billion ETB)

No.	Description	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	10-Year Total
1	Total Expenditure (1.1 + 1.2)	0.126862	0.183396	0.205075	0.22959	0.257358	0.288865	0.313696	0.341846	0.373896	0.41054	3.056869
1.1	Capital Expenditure	0.027830	0.033396	0.040075	0.04809	0.057708	0.06925	0.0831	0.09972	0.119664	0.143597	0.866916
1.2	Recurrent Expenditure	0.099032	0.15	0.165	0.1815	0.19965	0.219615	0.230596	0.242126	0.254232	0.266943	2.189953
2	Foreign Exchange (USD)	0.00005	0.00006	0.00007	0.00007	0.00008	0.00008	0.00009	0.00009	0.00009	0.00009	0.00077
3	Funding Sources (3.1 to 3.5)	0.3253	0.42817	0.481709	0.492668	0.437492	0.501319	0.544454	0.61848	0.65099	0.50464	4.985222
3.1	Government Budget	0.126862	0.183396	0.205075	0.22959	0.257358	0.288865	0.313696	0.341846	0.373896	0.41054	3.056869

3.2	Internal Revenue	0	0	0	0	0	0	0	0	0	0	0
3.3	Non-Govt Investments	0	0	0	0	0	0	0	0	0	0	0
3.4	External Aid (Direct)	0.198438	0.244774	0.276634	0.263078	0.180134	0.212454	0.230758	0.276634	0.277094	0.0941	2.254098
	GEF 6 Project	0.029460	0.029460	0.029460	0.029460	0.029460	0.029460	0.029460	0.029460	0.029460	0.029460	0.29368
	German Development Bank	0.096960	0.129280	0.161600	0.161600	0.064640	0.096960	0.129280	0.161600	0.161600	0.064640	1.22816
	Austrian Dev. Cooperation	0.032320	0.032320	0.032320	0.032320	0.032320	0.032320	0.032320	0.032320	0.032320	0	0.29088
	GIZ Project	0.032320	0.048480	0.048480	0.032320	0.048480	0.048480	0.032320	0.048480	0.048480	0	0.38784
	Born Free Foundation	0.007378	0.005234	0.005234	0.007378	0.005234	0.005234	0.007378	0.005234	0.005234	0	0.053538

References

- FDRE Ministry of Culture and Tourism (2008 E.C.): Cultural Policy of the Federal Democratic Republic of Ethiopia, Addis Ababa.

- Planning and Development Commission (August 2011 E.C.): Manual for Development Plan Preparation and Presentation, Addis Ababa.

- FDRE Ministry of Culture and Tourism (2008 E.C.): The Second Growth and Transformation Plan (GTP II) (2008-2012 E.C.), Bishoftu.

- FDRE Ministry of Culture and Tourism (June 30, 2011 E.C.): 2011 Fiscal Year Plan Performance Report, Addis Ababa (Unpublished).

- FDRE Ministry of Culture and Tourism (June 30, 2011 E.C.): 2012 Fiscal Year Annual Plan, Addis Ababa (Unpublished).

- Catering and Tourism Training Institute (CTTI) (2008 E.C.): Strategic Roadmap (2008-2017 E.C.), Bishoftu.

- National Planning Commission (August 2011 E.C.): Guidelines for the Preparation and Presentation of the Ten-Year Development Plan.

- TTI (2015): Skilled Human Power in Tourism and Hospitality Establishments within Selected Cities and Towns. Addis Ababa.

- CTTI (2018): Ethiopian Tourism and Hospitality Industry Labor Force Survey: The Case of Selected Star-Rated Hotels and Tour Companies. Addis Ababa.

- OOS (n.d.): Strategic Plan 2018–2022. Retrieved from https://sport.nsw.gov.au/sites/default/files/

- National Endowment for the Arts (2017): The Arts Contribute More Than $760 Billion to the U.S. Economy. U.S. Department of Commerce, Bureau of Economic Analysis: Value Added by Industry as a Percentage of Gross Domestic Product.

- UNESCO (1972): Convention Concerning the Protection of the World Cultural and Natural Heritage (World Heritage Convention).

- UNESCO (2003): Convention for the Safeguarding of the Intangible Cultural Heritage.

- Ministry of Tourism (n.d.): Tourism Sector Ten-Year Development Plan (Document Page 117).
- WTTC (2018): Travel & Tourism: Global Economic Impact & Trends.
- WTTC (2019): Travel & Tourism: Global Economic Impact & Trends.

Tourism Sector Medium-Term Development Plan (2024–2026)

Ministry of Tourism

March 2023

Table of Contents

Introduction 4

1. Sector Mission, Vision, and Values 5

2. Global Tourism Trends and Ethiopia's Competitiveness 5

2.1 Global Trends in Travel & Tourism 5

2.2 Ethiopia's International Competitiveness and Visitor Flow 6

3. Tourism Development Performance Evaluation (2021–2023) 7

3.1 Expanding Tourism Investment 7

3.2 Enhancing Tourism Service Quality 7

3.3 Enhancing Tourism Marketing and Promotion 8

3.4 Enhancing Destination and Attraction Development 11

3.5 Increasing Revenue and Job Creation 16

3.6 Performance of Wildlife Conservation and Development Activities 17

3.7 Performance Evaluation of Heritage Conservation and Preservation 20

Heritage Registration and Documentation 20

Museum Management and Development 21

Research and Studies 22

Heritage Conservation and Maintenance 22

Sustainable Management Systems 23

3.8 Tourism Sector Performance: 2021–2023 (2013–2015 E.C.) Ten-Year Development Plan Review 23

3.9 Challenges Encountered, Corrective Measures Taken, and Future Directions 28

3.9.1. Challenges Encountered During Implementation 28

3.9.2. Corrective Measures Taken 31

3.9.3. Future Directions and Strategic Orientations 32

3.10 Summary of Sectoral Challenges and Constraints 34

4. Medium-Term Development Plan Implications and Expected Results 35

4.1 Assumptions of the Plan 35

4.2 Focus Areas, Strategic Directions, and Goals 37

4.2.1 Focus Areas and Goals 37

4.2.2 Medium-Term Strategic Goals 38

4.3 Major Activities and Key Expected Results 38

4.3.1. Strengthening Institutional Execution Capacity, Resource Utilization, and Service Delivery 38

4.3.2. Identifying Tourism Potential and Developing/Expanding Destinations 39

4.3.3. Enhancing Financial Capacity, Investment, and Job Creation 39
4.3.4. Strengthening International Promotion and Marketing 39
4.3.5. Boosting Domestic Tourism for Social and Economic Contribution 40
4.3.6. Improving Service Delivery and Ensuring Excellence 40
4.3.7. Enhancing Wildlife and Habitat Conservation 40
4.3.8. Advancing Heritage Protection, Care, and Development 41
5. Strategic Goals, Major Activities, Key Performance Indicators (KPIs), and Targets 41
6. Medium-Term Investment Requirements and Targets 60
6.1 Detailed Annual Investment Targets by Project 64
7. Plan Implementation Strategies 67
Building Capacity for Execution and Implementation 67
Strengthening Linkages Among Sector Actors and Enhancing Coordination with Partners and Stakeholders. 67
Strengthening Community Participation and Benefit 68
Increasing the Role of the Private Sector in Sector Development 68
8. Risk Assessment and Mitigation Strategies 69
8.1 Risk Assessment 69
8.2 Strategies for Risk Mitigation 70
9. Monitoring and Evaluation Procedures and Systems 70
9.1 Components of Plan Implementation Monitoring and Evaluation 71

Introduction

In the global economy, tourism is the third-largest driving industry after chemicals and fuel. Due to its labor-intensive nature, it creates one out of every ten jobs globally, facilitating 319 million jobs. It accounts for 7% of world trade, covers $760 billion in investment activities, and contributes 10% to the global Gross Domestic Product (GDP). Furthermore, it plays a vital role in maintaining the trade balance, particularly for developing nations. As a primary source of foreign exchange, tourism is a leading service sector industry that enables structural economic transformation and change for many countries. Although the sector suffered significant losses due to the global COVID-19 pandemic, it has recently returned to normal operations following recovery interventions taken by North American, European, and Asian countries.

While Ethiopia possesses diverse tourism resources, there are significant gaps in developing the sector to generate its proper economic benefit. Consequently, tourism has been designated as one of the five strategic pillars in the Homegrown Economic Reform. To fully exploit the country's immense tourism potential for economic growth while maintaining its social contributions the economic share of tourism has been highlighted in the Ten-Year Perspective Development Plan. Model destination development projects have been implemented across various parts of the country to guarantee rapid growth. Additionally, since tourism was organized as an independent Ministry for the first time in its history, various legal framework reforms have been undertaken by reviewing traditional practices that hindered the sector's growth.

To realize the vision of making the country an "African Icon of Prosperity," the results achieved so far are encouraging. However, compared to the country’s vast potential, it remains a sector characterized by ongoing challenges. It is a newly restructured sector where equitable development and promotion work have only recently begun, and much work remains to be done relative to expectations. This Medium-Term Plan (2024–2026) is designed to translate the ten-year plan into effective and accelerated results and is organized into six parts:

- **Part One:** Reviews the global context of the tourism sector.

- **Part Two:** Assesses the sector's performance from 2019 to 2023 based on major goals, activities, and Key Performance Indicators (KPIs), including challenges faced and measures taken.
- **Part Three:** Contains development plan assumptions, strategic focus areas, goals, activities, and targets for the next three years.
- **Part Four:** Surveys investment needs, including development programs and projects.
- **Part Five:** Outlines the plan's monitoring and evaluation system.

1. Sector Mission, Vision, and Values

Mission To create a sustainable and competitive tourism industry by studying, protecting, developing, and promoting Ethiopia's cultural, historical, and natural tourism resources through community participation and stakeholder coordination; building the country's positive image; and ensuring superior social, economic, and ecological benefits.

Vision To make the tourism sector one of the leading foundations of national prosperity by 2030.

Values

- Respecting Diversity
- Hospitality
- Transparency
- Accountability
- Readiness for Change
- Service Excellence
- Inclusivity

2. Global Tourism Trends and Ethiopia's Competitiveness

2.1 Global Trends in Travel & Tourism

Over the past several decades, global tourism has grown rapidly, overcoming various man-made and natural shocks. International visitor arrivals grew at an average rate of over 4% until 2020. Long-term forecasts by the UNWTO predicted that arrivals would continue to grow by 3.3% annually through 2030, with developing regions like Africa, the Middle East, and the Caribbean growing faster than the global average.

In 2018, international arrivals reached 1.4 billion (a 5% increase), and tourism receipts grew to $1.7 trillion. Africa hosted 67 million visitors that year (a 7% increase), generating over $38 billion in revenue. In 2019, the sector continued its growth with 1.46 billion tourists and $1.48 trillion in revenue.

However, **2020** was an unprecedented year of decline. Due to COVID-19, international arrivals dropped by 1 billion (74%), revenue plummeted by $1.3 trillion, and 100–120 million jobs were put at risk. This crisis was 11 times worse than the 2009 economic crisis.

The sector is now recovering. In 2021, tourism contributed 6.1% to global GDP and created 289 million jobs. By 2022, the industry was expected to reach 80% to 95% of pre-crisis levels. UNWTO predicts arrivals will reach 1.8 billion by 2030.

Current Consumer Trends:

- **Purpose of Visit:** Leisure (52%), Business (14%), Visiting Friends & Relatives/Religious/Other (27%).
- **Economic Impact:** 60% of tourists are price-sensitive due to global inflation, favoring affordable service providers and nearby destinations.
- **Social Media Influence:** Instagram (40%), Facebook (33%), and TikTok (25%) are the most popular sources for travel ideas.
- **Preferences:** Nature-positive travel, off-the-beaten-path destinations, and locations that practice heritage and community conservation.

While Africa is recovering well, its share of the global market remains at only 5%. Ethiopia's share is currently 0.08% of the global market and 1.73% of the African market.

2.2 Ethiopia's International Competitiveness and Visitor Flow

In terms of tourism competitiveness, African nations generally perform well in natural/cultural resources and price competitiveness. Top African performers include Mauritius (62nd), South Africa (68th), and Tanzania (81st).

Previously, Ethiopia ranked 120th globally and 17th in Africa. Factors contributing to this low ranking include:

- Inadequate enabling environments and policy frameworks.
- Low quality of tourism services and infrastructure.
- Safety, security, and hygiene concerns.
- Low ICT adoption and human resource gaps.

Major achievements in the last three years include the establishment of the Ministry of Tourism, the inclusion of tourism as a key economic pillar, and new policy/strategy reforms.

3. Tourism Development Performance Evaluation (2021–2023)

3.1 Expanding Tourism Investment

A researched investment incentive package was designed to stimulate the sector.

- **Incentives:** 5 incentive packages were planned, including tax holidays and duty-free schemes.
- **Support:** Support was provided to 999 organizations (hotels, lodges, resorts) regarding credit services, land supply, and foreign expert hiring.
- **New Entries:** 185 new investments joined the sector, exceeding the target of 157.

Despite these gains, Ethiopia remains at a low level compared to competitors in terms of international brand hotels, total room capacity, and variety of facilities. A critical gap is the lack of Stopover Tourist Facilities along long road routes and the absence of high-standard lodges or camping facilities in many National Parks.

3.2 Enhancing Tourism Service Quality

Quality of service is a decisive factor in global competitiveness. While the Ministry has implemented an international-standard hotel grading system grading 365 hotels across various regions the process has faced challenges in speed and consistency.

Rankings & Reality:

- Ethiopia ranks 134th out of 140 countries in providing high-standard guest rooms.

- Neighbors like Kenya (122nd) and Tanzania (118th) rank significantly higher.
- Only 32% of the workforce in the hotel sector is professionally trained, directly impacting service quality.

The medium-term plan focuses on moving beyond just "counting graded hotels" to implementing comprehensive quality improvement tools, professional training, and mindset-changing initiatives to ensure Ethiopia can compete on the world stage

3.3 Enhancing Tourism Marketing and Promotion

When the 10-year plan was developed, various assumptions were established by analyzing internal and external conditions regarding tourism marketing and promotion. These assumptions involved domestic factors on one hand and global tourism market conditions on the other. Accordingly, from an external perspective, it was assumed based on positive UNWTO forecasts that the sector would continue its uninterrupted growth, that no extraordinary global natural or man-made crises would occur, and that digital technology would play a significant role in propelling the sector. It was also anticipated that major tourist-originating countries would experience relative economic stability and that visitors would increasingly prefer long-haul trips, leading to continuous growth in the tourism industry.

From a national perspective, it was assumed that as the country was in a period of transition, internal unity would strengthen, and peace and stability would prevail. This was expected to ensure visitor safety and maintain a positive global image. Furthermore, it was anticipated that African tourism would grow faster than other regions, with Ethiopia capturing a proportionate share.

Additional assumptions included:

- Hosting high numbers of tourists through Event and Stopover Tourism.
- Modernizing visa systems and improving customs processes to facilitate regional integration.
- Establishing a Tourism Fund to support large-scale promotion of Ethiopia.
- Opening Overseas Offices to promote Ethiopia abroad.
- Ensuring the availability of essential human and material resources amid relative economic stability.

- Rapidly developing ICT and digital systems within the sector.

In this context, the major milestones achieved in marketing and promotion over the past three years include designating tourism as a key economic sector a major "departure" for the industry and establishing the Ministry of Tourism for the first time, followed by policy, strategy, and reform reviews.

To create new markets and increase market share in traditional source countries, Ethiopia resumed participation in 6 international trade fairs (which had been interrupted by COVID-19). This involved strategic participation to promote the "Land of Origins" brand to thousands of exhibitors and visitors, playing a vital role in image building via international media. Efforts were also made to encourage the Ethiopian diaspora to visit their home country and act as ambassadors.

Furthermore, to give destinations unique identities, destination branding aligned with "Land of Origins" was conducted in selected regions. To expand Event Tourism, 17 international events were hosted in Ethiopia. Partnerships were established with international event organizers and stakeholders to increase the number of future events.

To foster a Domestic Tourism culture, a tour savings account and a digital booking/payment system were launched. Tourism clubs were established in schools and institutions. The "Know Ethiopia" (≠ልወቅሽ ኢትዮጵያ) national movement was designed, utilizing innovative promotional videos covering all parts of Ethiopia. These were promoted during high-reach events like the Qatar World Cup, followed by the development of domestic tour packages.

Given the industry's link to technology, several digital initiatives were launched:

- The Tourist Smart Card system.
- The "Visit Ethiopia" Mobile App, providing easy access to information on attractions, service providers, and facilities.
- 3D Digital Virtual Reality exhibitions.
- Website upgrades (including regional offices) and the adoption of flexible payment options.

On the other hand, some planned promotional activities remained unfulfilled, including opening overseas offices in source countries, advertising on major international broadcast media, facilitating international film productions in Ethiopia, organizing a "One Africa Carnival," and implementing the "My Home Ethiopia" and "Back to My Origin" campaign programs.

Overall, due to internal and external pressures, the sector attracted 1.49 million foreign visitors against a target of 4.43 million. Foreign exchange earnings reached $5.42 billion, compared to a target of $12.24 billion. Job creation reached 193,269 citizens, near the target of 200,000. Domestic tourism flow, bolstered by various initiatives, reached a cumulative 80.9 million visitors over the three-year period.

Analysis of these results shows that the COVID-19 pandemic directly contradicted the plan's assumptions, halting global movement and reducing international arrivals by over 74%. Similarly, the domestic conflict in Northern Ethiopia fundamentally disrupted the planned progress.

A critical flaw in the original plan was the assumption that average length of stay would continuously increase. In reality, global trends show the average stay is 6.5 days and has been declining by 15% over the last 20 years; thus, targeting an increase for all ten years was unrealistic. Regarding average daily spending, the target of $234.5 (reaching $158.6 in 2030) was found to be impractical. Instead, the focus should shift to increasing revenue by improving service quality, diversifying products, and expanding destination infrastructure and activities.

Wildlife Tourism: While the goal was to reach 470,000 visitors and 510 million Birr in revenue, the actual performance was 357,020 visitors (76%) and 304 million Birr (60%), largely due to security issues and COVID-19.

Gaps identified include:

- Limited image-building efforts to counter negative media campaigns and travel bans.
- Non-implementation of the Tourism Fund.
- Insufficient use of celebrity endorsements and international media compared to other countries.
- Lack of region-specific market development strategies.

- Weakness in stopover tourism, visa/customs processes, and data quality.

The 10-year plan also contained unclear indicators and unrealistic tasks (e.g., overseas offices) that were not based on accurate assessments. Domestic tourism culture, while improving, remains underdeveloped. The medium-term plan must address these discrepancies.

3.4 Enhancing Destination and Attraction Development

A primary measure of a country's tourism competitiveness is the quality of its destinations, its ability to adapt to changing tourist behaviors, and the diversity of its tourism products. According to the Travel and Tourism Development Index, Ethiopia remains among the lower-ranked countries in destination capacity.

Table 1: International Infrastructure and Competitiveness Rankings (Out of 148 Countries)

Performance Criteria	Ethiopia	Kenya	Rwanda	Botswana	South Africa
Quality of Air Transport Infrastructure	98	74	118	103	53
Quality of Ground and Port Infrastructure	116	69	63	100	58
Quality of Tourist Service Infrastructure	138	103	122	84	64
Health and Hygiene	116	115	129	118	113
ICT Readiness	131	109	110	94	75

Source: The Travel and Tourism Competitiveness Report 2019

Based on the 2019 International Travel and Tourism Competitiveness Report, Ethiopia maintains a relatively competitive position in air transport capacity compared to other African nations, though significant work remains to enhance the overall quality of tourism infrastructure.

The 10-year development plan was formulated with the recognition that Ethiopia's destination competitiveness was low. It focused on two pillars: expanding infrastructure and facilities in new destinations while adding value to existing attractions to boost global appeal.

New Destination Development

Recognizing that diversifying tourism products is key to global competitiveness, the government planned to develop 4 new destinations within three years but exceeded this by developing 6. High-standard facilities and sites are currently being established, many initiated by the Prime Minister. Notable projects include:

- **Entoto Park:** A completed flagship park offering recreational and accommodation services.
- **Science and Art Museum:** A unique landmark in Addis Ababa blending modern architecture with cultural education.
- **"Dine for Ethiopia" Projects:** The massive ecotourism developments in **Gorgora, Wenchi, and Koysha** are nearing completion, bringing roads, electricity, and high-end lodges to these regions.
- **Metahara/Halaydeghi:** A luxury comprehensive resort built near Metahara to unlock the potential of the eastern tourism circuit.
- **Senkele Swayne's Hartebeest Sanctuary:** A community-based lodge designed to alleviate the shortage of service facilities and ensure local economic benefit.

Table 2: New Tourism Destination Development Status (2026)

Project Name	Region	Development Activities	Status
Wenchi	Oromia	Roads, Water, Electricity, Lodges	Partially Finalized / Operational
Koysha	Southwest	Roads, Water, Electricity, Lodges	Nearing Completion
Gorgora	Amhara	Roads, Water, Electricity, Lodges	Nearing Completion

Entoto Park	Addis Ababa	Accommodation and Recreation	Fully Completed
Unity Park	Addis Ababa	Historical and Natural Exhibits	Fully Completed

Table 3: Regional Tourism Destination Projects

Project Name	Location	Development Activities	Status
Hambaricho 777 Steps	Durame	Climbing steps, viewpoints	Fully Completed
Awetu Riverfront	Jimma	Walkways, seating, greening	Fully Completed
Lake Hawassa Waterfront	Hawassa	Walkways, greening	Fully Completed
Mount Tabor Development	Hawassa	Infrastructure and viewpoints	Fully Completed
Hara Dembel (Lake Ziway)	Batu	Waterfront development	Under Construction
Adama Geda Park	Adama	Recreational facilities	Fully Completed
Esa Riverfront	Shashemene	Greenery and walkways	Ongoing
Landmarks/Gateways	Addis Ababa	Entrance/Exit promotional displays	Fully Completed

Enhancing Existing Destinations

While Ethiopia is rich in natural and cultural attractions, many "legacy" sites lack the quality required by international standards. To address this, the government targeted 12 existing destinations for value-adding interventions and successfully completed work on 11.

Key improvements include:

- **Sanitation & Facilities:** Construction of standardized restrooms and information centers at the **National Museum**, **Lalibela**, and **Nech Sar National Park**.
- **Information & Signage:** Installation of landmarks and signage in **Harar**, **Dire Dawa**, and **Bekoji** to improve the visitor experience.

- **National Museum Renovation:** The museum underwent architectural restoration and the organization of a permanent archaeological exhibition highlighting Ethiopia as the "Cradle of Mankind."
- **Wildlife Infrastructure:** Coverage of infrastructure in protected areas increased to 42%. This included building offices, ranger housing, and 121 km of new roads across 6 conservation sites, as well as maintaining over 1,311 km of internal patrol roads.
- **Garamba Community Conservation (Sidama):** Addition of mountain climbing steps (300m), camping sites, and security posts to make the destination more accessible and comfortable for tourists.

Table 4: Information on Destinations with Added Value

Project Type/Name	Location	Detailed Development Activities	Development Status
Swayne's Hartebeest Sanctuary Community Lodge	Swayne's Hartebeest Sanctuary (Senkele)	Dining and lounge areas, guest rooms, restrooms, showers, handicraft production and sales center, camping facilities	Partially Completed
Shalla Community Lodge	Abijatta-Shalla Lakes National Park	Dining and lounge areas, guest rooms, restrooms, camping facilities	Fully Completed
Erta Ale Resting Area	Erta Ale	Accommodation and dining facilities	Fully Completed
Landmarks (Site Markers)	Abay Gorge, Dallol Depression, Bekoji, Harar, and Dire Dawa	Symbolic markers representing the local area	Fully Completed
Lalibela International Heritage Site Enhancement	Lalibela	Site improvements, restrooms, and community-related support	Partially Completed
Jimma Abba Jifar Palace Enhancement	Jimma	Site improvements and establishment of visitor services	Ongoing
Garamba Community Conservation Area Development	Sidama	Office, restrooms, security post, mountain climbing steps, and tourist camping site	Fully Completed

On the other hand, focusing on the promotion of community-based tourism development through exemplary destinations, Ethiopia participated in the **Best Tourism Villages** competition organized by the World Tourism Organization (UNWTO). Accordingly, **Wonchi** (Oromia Region) and **Choqe Mountain** (Amhara Region) community-based tourism villages were selected and recognized globally as winners. Additionally, the **Adaba-Dodola** ecotourism destination in Oromia received recognition in the "upgrading" category for its potential for further development. These achievements were realized by submitting detailed reports supported by text and video, showcasing the immense tourism potential of the sites and the high quality of community participation.

In terms of creating **Niche Tourism products**, efforts were made to diversify the sector by strengthening sports tourism. One such product involved the promotion of mountain running and cycling in selected locations. In collaboration with tour operators, a cycling competition and mountain program titled **"Ride the Rift"** was organized, successfully introducing activity-based tourism as a specialized travel package.

To better identify Ethiopia's endowed historical, cultural, and natural resources and to design integrated development programs, a project for **Country-Level Tourism Resource Mapping** has been designed. Pilot testing has commenced, with full-scale implementation to follow.

Overall, the strategy of relying on traditional destinations and products, while attempting to create centers of attraction out of a few sites with limited appeal, has proven ineffective. Furthermore, due to significant limitations in establishing destinations that meet international standards, our national competitiveness in the global tourism market remains low. Therefore, based on Ethiopia's immense natural and cultural wealth, it is essential to develop diverse tourism products and numerous destinations that align with evolving global market demands.

While the ongoing destination development works have created good momentum, the strategic development of our diverse resources and the creation of competitive products remain key priorities. Many attractions still suffer from a lack of critical and supporting infrastructure. Even the most famous legacy destinations have significant gaps when measured against international

standards. Consequently, it is necessary to establish a destination standardizing system that centers on international competitiveness while remaining adapted to the national context.

Since tourism destination development is a capital-intensive process that pays off over time, a severe financial shortage has been observed in developing new sites and strengthening existing ones. Moreover, because destinations cannot be developed by the tourism sector alone, weak coordination with infrastructure-providing institutions has created a significant bottleneck.

Furthermore, although active community participation and ownership are vital for sustainable development, many attractions either alienate local communities or fail to provide them with proper benefits. Since community involvement is a key role-player, sustainability must be ensured through community-based tourism, ecotourism, and similar community-centered initiatives.

Additionally, the failure to adequately establish and strengthen tourism enterprises that provide products and services at these destinations has led to low visitor satisfaction and limited local economic gain. Therefore, creating and strengthening enterprises within the tourism value chain is a critical issue for the future.

3.5 Increasing Revenue and Job Creation

Enhancing the economic contribution of tourism is vital for community benefit and national development. Over the past few years, against a target of $12.24 billion in foreign exchange earnings, $5.42 billion was achieved a performance rate of 44.2%. Similarly, while the target was to create 200,000 jobs, 193,269 jobs were created, representing 43.4% of the original overarching goal of 445,000.

These jobs were created through:

- New hotels that completed construction and began operations.
- Newly established tour operation and event organizing companies.
- Construction and development projects led by regional and federal institutions.
- Increasingly popular activity-based tourism ventures.
- Hotel and tourism consultancy firms and other actors within the tourism value chain.

These figures represent both permanent and temporary employment based on performance data from various regions.

In terms of supporting **Tourism Enterprises**, the target was to support 4 new community-based enterprises; however, **5 enterprises** were established at various destinations. Significant work was done to establish community tourism enterprises within the **Senkele Swayne's Hartebeest Sanctuary** and the **"Dine for Ethiopia"** projects (Wenchi, Gorgora, and Koysha).

Nevertheless, the full potential of job creation in the sector remains untapped because large-scale investments have been limited, and small to medium tourism businesses have lacked a conducive business environment and financial support. Moving forward, it is necessary to focus on expanding investment, strengthening enterprises, and fostering tourism innovation to maximize employment opportunities for citizens.

3.6 Performance of Wildlife Conservation and Development Activities

In terms of expanding **wildlife conservation coverage**, representative and critical ecosystems were studied with the goal of reaching 9.7% national coverage. This initiative integrated international targets and community participation, allowing for management by the government, private investors, and local communities. The evaluation shows that coverage reached **9.6%**. Furthermore, restoration efforts successfully rehabilitated **68,890 hectares** of habitats degraded by human pressure and **916 hectares** infested by invasive species.

However, many conservation areas remain degraded due to human-induced pressures and natural disasters, necessitating a more robust restoration framework. Significant gaps remain in establishing systems for the recovery of endangered species (per the IUCN Red List), protecting buffer zones, and ensuring ecological connectivity and wildlife corridors. These areas require high priority in the coming years.

Law Enforcement and Protection

To enhance **law enforcement** within wildlife habitats, the plan aimed to reduce illegal activities by 74%. Through coordinated patrol and control measures targeting illegal hunting, deforestation,

overgrazing, livestock encroachment, and unauthorized agricultural expansion illegal acts were reduced by **65%**.

While this progress is encouraging, limitations in enforcement capacity and coordination mean that habitats are still not fully free from human pressure. Developing an inclusive and integrated protection system is essential to safeguard the survival of national parks and sanctuaries.

Emergency Preparedness and Disaster Risk Management

Efforts to increase disaster preparedness (against fire, floods, disease outbreaks, and landslides) aimed for a 65% readiness level. By developing fire prevention strategies in two national parks and supporting areas affected by natural droughts, an average performance of 40% (62% of the target) was achieved. Although recent disasters have been limited, the sector lacks early warning systems and adequate resources. Improving disaster forecasting, prevention, and response remains a critical necessity.

Research and Infrastructure Development

- **Research & Studies:** The plan aimed to utilize 51 problem-solving research findings; **49** were implemented. Memorandums of Understanding (MoUs) were signed with 16 universities. However, most research was not conducted directly by the institution's researchers and failed to focus on high-priority endangered species, a gap that must be addressed by building internal research capacity.
- **Infrastructure:** The goal was to increase infrastructure coverage by 50%, with an actual achievement of **42%** (84% of the target). Accomplishments include:
    - **4** new administrative offices.
    - **6** ranger housing facilities.
    - **121 km** of new roads across 6 sites.
    - **1** tourist information center.

- Maintenance of **1,311.54 km** of internal patrol roads. Despite these gains, limited capital budgets and execution gaps mean that road networks and tourist facilities remain insufficient.

Community Participation and Benefit-Sharing

To increase community benefits, the plan aimed to support 58,800 people through ecotourism and alternative livelihoods. This was exceeded, reaching 63,467 individuals (100% of target) who generated 62.38 million Birr (78% of the financial target). However, these benefits are not yet distributed across all conservation areas. Future plans must focus on permanent alternative livelihoods to increase the sector's economic contribution.

Regarding **public awareness**, the goal was to reach 510,000 stakeholders; however, **1,082,155 people** were engaged. While the reach was high, there is a need to evaluate actual behavioral changes and adopt more modern awareness-creation strategies.

Conflict Management and Partnerships

- **Human-Wildlife Conflict:** Efforts to reduce conflicts aimed for a 73% reduction, achieving **40%** (55% of the target). While strategies and prevention manuals were distributed, escalating ecological degradation has caused conflicts to rise, requiring stronger institutional capacity to implement solutions.
- **Partnerships:** Collaborative efforts with NGOs, international partners, and government stakeholders have yielded results in some areas. Given the collaborative nature of the sector, these integrated efforts should be mainstreamed into all core organizational goals.

Capacity Building and Technology

- **Human Resources:** Training was provided to **4,165 staff** (95% of target). However, the lack of a comprehensive human resource development strategy meant that the training did not always address specific capacity gaps. There is also a notable lack of an incentive system to boost the morale and commitment of staff working in high-risk environments.

- **Technology:** Technological utilization reached **30%** (against a 35% target). Tools such as Wi-Fi, drones, camera trapping, SMART (Spatial Monitoring and Reporting Tool), e-

services, sniffer dogs, and geospatial mapping were utilized. Despite these steps, Ethiopia lags behind global technological standards. Future focus must include establishing digital radio communication systems and acquiring advanced conservation technologies for research and conflict monitoring.

3.7 Performance Evaluation of Heritage Conservation and Preservation

Heritage Registration and Documentation

To identify the type, quantity, and distribution of the nation's heritage, a uniform registration system has been established. Following the federal structure, the Authority developed a new registration manual and coding system for both movable and immovable heritage. This manual was published and distributed extensively to regional states and city administrations. To ensure effective implementation, professional training and technical support were provided to regional heritage experts. Supported by the Authority's professionals, the registration of 334 immovable and 3,294 movable heritages was successfully completed across various regions.

Despite these achievements, several gaps persist in heritage registration and control, primarily stemming from weak institutional linkages with regional and city administrations. Challenges include:

- **Institutional Constraints:** Shortages in organizational structure, skilled manpower, budget, and logistical inputs at the regional level.
- **Operational Gaps:** Support and monitoring activities revealed that heritages are not always registered according to the national manual despite repeated capacity-building efforts.
- **Information Management:** Regional and city administrations often fail to report registered heritage data to the central Authority in a timely manner, making it difficult to maintain a comprehensive national database regarding the diversity and distribution of heritage assets.

Regarding the **restitution of illicitly exported heritage**, various efforts have been undertaken. Through the goodwill of institutions, individuals, and associations, a limited number of artifacts have been returned. However, many host countries remain reluctant to repatriate items, often citing

complex legal hurdles. Nevertheless, through the coordinated efforts of the National Heritage Restitution Committee, the Ministry of Foreign Affairs, overseas embassies, and "Friends of Ethiopia," 19 significant heritage items were successfully restituted over the past three years.

Museum Management and Development

For many years, the **National Museum of Ethiopia** faced public criticism due to deteriorating building conditions, inadequate sanitation facilities, and stagnant permanent exhibitions. In response, corrective measures were taken, including the construction of a standard restroom facility and a complete renovation of the **Historical-Archaeology Permanent Exhibition**. This exhibition was reorganized with modern facilities and newly curated collections, subsequently being inaugurated for public viewing.

In terms of **museum visitation**, the target for 2021–2023 (2013–2015 E.C.) was set at 4 million visitors (approximately 2 million per year). However, actual performance fell significantly short:

- In 2021, services were disrupted due to the COVID-19 pandemic.
- In 2022, the museum recorded only 52,000 visitors.
- By mid-2023, only 43,613 visitors were hosted. The primary reasons for this low performance include overambitious planning that did not account for historical data, the impact of the pandemic, regional security challenges affecting tourism, and an underdeveloped domestic culture of museum visitation.

Regarding **new museum projects**, the medium-term plan aimed to establish one new museum and begin the construction of another.

1. **The Museum of Human Origins:** Planned to begin in 2021 and conclude in 2023 with a budget of 1.2 billion ETB. However, the project remains stalled because the Authority has been unable to take possession of the 4,000-square-meter site in Arada Sub-city (Woreda 6). Although the Authority paid over 9 million ETB in compensation to displaced residents, the site has not yet been handed over.
2. **The New National Museum of Ethiopia:** Planned to commence in 2023 with a budget exceeding 3 billion ETB; however, no physical progress has been made to date.

Research and Studies

The Authority has been active in conducting research and studies over the last three years, primarily focusing on:

- Studying intangible cultural heritage and preparing nomination dossiers for international registration.
- Conducting archaeological surveys and publishing catalogs and research project findings.
- Issuing permits and renewals for heritage research projects.
- Organizing consultative forums with regions and universities.

These activities were largely successful due to collaborations between Authority staff, regional stakeholders, and local Culture and Tourism offices. Notably, a full study for one intangible heritage was submitted to UNESCO for inclusion in the Representative List of the Intangible Cultural Heritage of Humanity. Similarly, a cultural landscape was studied and submitted for World Heritage status.

However, research in **Paleontology, Paleoanthropology, and Archaeology** faced setbacks. Due to security concerns and conflict in various parts of the country, international researchers were unable to access field sites. Consequently, only 14 research permits and monitoring sessions were conducted out of a planned 30. This also led to a decrease in the number of artifacts collected for laboratory analysis and a subsequent decline in laboratory service performance.

Heritage Conservation and Maintenance

The core objective of conservation is to protect heritage from damage caused by poor handling, age, natural disasters, or human intervention. Over the past three years, the Authority planned conservation and study work for 31 immovable heritages.

- **Immovable Heritage:** Five projects achieved 100% completion, while maintenance studies and partial works were initiated for another 10 sites. Implementation was hindered by regional instability, which restricted field mobility.

- **Movable Heritage:** Performance exceeded expectations in this area; while the target was to maintain 90 items, 4,573 movable artifacts and wall paintings underwent various levels of maintenance and conservation.

A significant challenge remains the high professional demand for heritage maintenance, which exceeds the capacity of the Authority's limited staff. To address the backlog of public requests, the Authority is currently preparing operational guidelines and manuals to facilitate **private sector involvement** in heritage maintenance in the coming years.

Sustainable Management Systems

To ensure the long-term protection of World Heritage sites, several management systems were established:

- Ten-year **Strategic Management Plans** were developed for three international heritage sites.
- A **Risk Management Document** was prepared for one site to identify and mitigate threats.
- Boundary demarcation and a draft legal framework were initiated for another international site.
- Digital mapping and boundary demarcation were completed for the heritages in **Gondar, Tiya, and Lalibela**.

A major ongoing challenge is the impact of large-scale infrastructure and construction projects near international heritage sites, which often threaten their "Outstanding Universal Value" (OUV). To mitigate this, the Authority has mandated **Heritage Impact Assessments (HIA)** for major development projects near these sites to ensure that modern development and heritage preservation remain compatible.

3.8 Tourism Sector Performance: 2021–2023 (2013–2015 E.C.) Ten-Year Development Plan Review

No.	Strategic Goals and Major Activities	Unit of Measurement	2021 (2013 E.C.)	2022 (2014 E.C.)	2023 (2015 E.C.)
1	**Identify Tourism Potential and Expand Destination Development**				

1.1	Identify tourism potential and develop new destinations				
	* New tourism destinations developed	Number	-	3	3
	* Value-added tourist destinations	Number	6	7	6
1.2	Increase the variety and standard of tourist products				
	* Identified and market-ready tourist commodities	Number	-	-	5
	* Standardized tourist products	Number	-	-	4
2	**Enhance Private Sector Investment and Financial Capacity**				
2.1	Expand foreign and domestic investment				
	* Number of domestic investors	Number	-	50	280
	* Number of foreign investors	Number	-	5	23
	* Investors who obtained licenses/registered	Number	-	55	303
	* New tourist service provider organizations	Number	63	-	-
2.2	Enhance the financial capacity of the sector				
	* Types of tourism fund sources	Number	-	-	4
3	**Increase Economic Benefits through Forex Earnings and Job Creation**				
3.1	Increase foreign exchange earnings by growing international tourist flow				
	* Number of international tourists	Million	209,690*	777,268*	0.96

	* Revenue generated from the sector (Forex)	USD Billions	0.324	3.098	3.6
3.2	Expand job opportunities and community benefits in tourism				
	* Direct jobs created in the sector	Number	191,247	37,308	104,538
	* Number of new community-based tourism enterprises	Number	-	1	7
3.3	Increase domestic revenue by enhancing the culture of domestic tourism				
	* Number of domestic visitors	Million	25.5	28	38.2
	* Revenue generated from domestic tourism	ETB Billions	-	-	61.12
No.	Strategic Goals and Major Activities	Unit of Measurement	2021 (2013 E.C.)	2022 (2014 E.C.)	2023 (2015 E.C.)
4	Enhance Tourism Promotion and Marketing				
4.1	Increase global competitiveness by implementing strong marketing and promotion strategies				
	* Market linkages created (B2B)	Number	-	-	35
	* Regional and international events hosted in Ethiopia	Number	-	-	14
	* International tourism promotion activities conducted	Number	5	4	12
	* Domestic tourism promotion activities conducted	Number	6	10	45
	* Increased Ethiopian tourism online presence	Percentage	-	-	30%
4.2	Strengthen diplomatic relations with other countries in the sector				
	* New tourism partnerships/linkages formed with countries	Number	-	-	4

	* Existing tourism partnerships/linkages strengthened	Number	-	-	5
5	Improve Service Delivery and Ensure Excellence in Tourism				
5.1	Enhance the quality and standards of tourist service provider institutions				
	* Increase in visitor satisfaction	Percentage	52.1%	-	60%
	* Star-rated/Graded tourist service organizations	Number	30	-	569
	* Certified and inspected tourist service institutions	Number	63	150	463
6.2	Develop Modern Technology and ICT Utilization in the Sector				
	* Implementation of Tourist Smart Card system	Number	-	-	1
	* Development and launch of tourism promotion mobile apps	Number	-	-	1
7	Enhance Wildlife Conservation and Development				
	* Increased coverage of protected areas	Percentage	9.1%	9.2%	9.6%
	* Reduction in illegal activities	Percentage	65%	65%	65%
	* Rehabilitated wildlife habitats/sanctuaries	Hectares	578.8	207.68	280.11
No.	Strategic Goals and Major Activities	Unit of Measurement	2021 (2013 E.C.)	2022 (2014 E.C.)	2023 (2015 E.C.)
7	Enhance Wildlife Conservation and Development (Cont.)				
	* Awareness on Human-Wildlife Conflict	Number of People	53	103	60

	* Disaster Prevention Preparedness	Percentage	35%	37%	40%
	* Increased Public Awareness (General)	Number of People	187,874	179,460	223,335
	* Increased Benefits from Wildlife Development	Number of Beneficiaries	16,498	15,584	66,376
	* Increased Community Participation & Ownership	Number of People	204,372	195,044	289,711
	* Growth in Technology Utilization	Percentage	30%	30%	30%
	* Research Findings Utilized	Number	27	25	25
	* Wildlife-Based Tourist Flow	Number	53,320	133,670	113,500
	* Growth in Infrastructure Coverage	Percentage	40%	41%	42%
8	Enhance Heritage Conservation and Preservation				
	* Registered Movable Heritage	Number	-	194	3,090
	* Registered Immovable Heritage	Number	-	110	214
	* Cultural Heritage Graded at National Level	Number	-	-	-
	* Heritage Monitoring/Control Activities	Number	-	413	223
	* Awareness & Capacity Building Forums	Number	-	4	6
	* Management Plans Prepared for Heritage Sites	Number	1	2	-
	* Stakeholder Consultation Forums	Number	2	2	2
	* Heritage Disaster Risk Assessments	Number	2	1	2
	* Heritage Status Reports Prepared	Number	-	-	1

	* Number of Publications	Number	1	2	-
	* Offices Opened at World Heritage Sites	Number	2	1	-
No.	Strategic Goals and Major Activities	Unit of Measurement	2021 (2013 E.C.)	2022 (2014 E.C.)	2023 (2015 E.C.)
8	Heritage Conservation and Preservation (Cont.)				
	* Immovable heritage sites maintained/conserved	Number	20	7	9
	* Movable heritage maintained/conserved	Number	-	-	-
	* Maintenance works by third parties supervised	Number	-	1	-
	* Professional support provided	Number	-	-	1
	* Scientific archaeological and paleontological studies	Number	2	2	1
	* Laboratory and cast & mold works performed	Number	109	116	50
	* Digitized movable heritage items	Number	1,750	3,547	1,219
	* Temporary exhibitions prepared	Number	-	-	2
	* Number of museum visitors	Number	8,711	57,628	81,358
	* Museums graded/standardized	Number	-	-	6
	* Revenue generated from museums	ETB	-	854,743	1,957,716

3.9 Challenges Encountered, Corrective Measures Taken, and Future Directions

3.9.1. Challenges Encountered During Implementation

- **Safety and Perception:** Instability and disruptions to peace within the country led to significant pressure from Western nations, resulting in travel bans and negative travel

advisories. This damaged the country's global image, while marketing and image-building efforts to counter this were limited.

- **COVID-19 Impact:** The pandemic caused a global economic slowdown and major disruptions in the tourism market. Travel restrictions, the closure of service providers, and a collapse in demand led to the cancellation of international trade fairs and promotional platforms, causing a drastic decline in visitor flow.
- **Resource and Infrastructure Gaps:** A severe shortage of financial resources hindered the development of new destinations and the addition of value to existing ones. Furthermore, inter-institutional coordination to ensure basic infrastructure at tourist sites remained weak.
- **Marketing and Branding Limitations:** There was a lack of established partnerships with international marketing and PR firms. Procedural gaps and financial constraints limited the ability to organize familiarization (FAM) trips and promote the country through world-renowned media outlets.
- **Value Chain and Service Quality:** The quality of services across the tourism value chain—from visa issuance to airport hospitality—remained low and largely un-modernized.
- **Security Concerns:** Security risks and concerns for visitor safety were observed in certain tourist destinations and major cities, including Addis Ababa.
- **Wildlife and Habitat Threats:** Efforts to save protected areas and endangered species were hampered by insufficient support and participation from government structures, local communities, and non-governmental stakeholders.
- **Entrepreneurial Bottlenecks:** While tourism enterprises are crucial for growth, SMEs (Small and Medium Enterprises) faced a lack of credit facilities, an unconductive business environment, and a lack of support systems for implementing innovative ideas.
- **Conflict-Induced Destruction:** War in Northern Ethiopia and security issues elsewhere led to a total loss of income for communities dependent on tourism. Significant property damage was inflicted on service providers, while attraction sites, cultural heritages, parks, and natural habitats suffered physical destruction, severely impacting research services.
- **Operational Disruptions in Parks:** Periodic security issues disrupted regular development and conservation activities in several national parks, including the Simien

Mountains, Kafta Sheraro, Omo, Awash, Hallaydeghe, Geralle, Gambella, Alatish, Nech Sar, and the Babile Elephant Sanctuary.

- **Natural Disasters:** Limited institutional capacity (both in skills and equipment) hindered the rapid control of frequent wildfires and other natural disasters. Extended droughts also placed extreme pressure on parks like Omo, Nech Sar, Geralle, Borena, and Bale.
- **Human-Wildlife Conflict:** Incidents of conflict between humans and wildlife have been increasing, and institutional capacity to mitigate these issues remains limited.
- **Demarcation Issues:** Various bottlenecks delayed the re-demarcation of protected areas located between two regional states, specifically Nech Sar National Park and Babile Elephant Sanctuary.
- **Logistical Constraints:** Since wildlife protection is "Para-Military" in nature, the Authority lacked the logistics and resources to match the capabilities of illegal actors (poachers and encroachers).
- **Incompatible Investments:** Some development investments were found to be incompatible with wildlife conservation, causing irreversible damage to habitats, often due to a narrow, sector-specific focus by other agencies.
- **Awareness Gaps:** Despite extensive awareness-creation efforts, a significant gap remains at various levels, and increased knowledge has not always translated into the necessary behavioral changes.
- **Heritage Documentation:** Due to the sheer volume and wide distribution of movable and immovable heritage, many have not yet been scientifically registered, complicating efforts to ensure their safety and maintenance.
- **Expertise Shortage:** There is a critical shortage of skilled manpower in heritage restoration. The delay in implementing legal frameworks to involve the private sector has left many regional sites without timely intervention.
- **Institutional Stewardship:** Since many heritages are owned by religious institutions, damage has often occurred under the guise of "renovation" or "maintenance" without professional oversight.
- **Restitution Complexity:** Efforts to return looted heritage items remain difficult due to their wide dispersal across Europe and North America and the complex international legal environments involved.

3.9.2. Corrective Measures Taken

- **Digital Promotion:** Shifted toward using social media and virtual platforms to conduct destination promotion and image-building activities in various countries.
- **Special Initiatives:** Implemented national programs like the "Great Ethiopian Homecoming" (Diaspora call) and the "Eid-to-Eid" program to stimulate visitor flow.
- **Impact Assessment and Recovery:** Conducted a comprehensive impact assessment (economic loss, property damage, and resource destruction) following the pandemic and conflict, leading to a formalized recovery plan and domestic tourism incentives.
- **Modernization:** Leveraged Information and Communication Technology (ICT) to modernize the sector and improve information management systems.
- **Collaborative Development:** Sought cooperation with development partners to mobilize resources for destination development and the identification of new tourism assets.
- **Global Networking:** Strengthened partnerships with Ethiopian Airlines, the private sector, and Ethiopian embassies abroad to ensure Ethiopia's participation in international trade fairs.
- **Service Coordination:** Initiated consultative forums with relevant authorities to address bottlenecks in visa issuance and airport customs services.
- **Quality Control:** Continued the grading, supervision, and monitoring of tourist service providers to enhance visitor satisfaction.
- **Integrated Security:** Worked in coordination with regional administrations and security agencies, including the National Intelligence and Security Service (NISS), to create a sustainable and safe environment for tourists.
- **Disaster Response:** Mobilized local stakeholders and government institutions to control wildfires before they reached catastrophic levels and provided emergency fodder and water for wildlife during extended droughts.
- **Conflict Mitigation:** Developed and implemented manuals to reduce human-wildlife conflict and conducted awareness training for vulnerable communities.
- **Demarcation Agreements:** Conducted surveys and stakeholder forums regarding cross-regional parks, reaching conceptual agreements for re-demarcation.

- **Resource Mobilization:** Designed project proposals for partners to secure additional funding and engaged the Federal Police to study and address the logistical gaps in the Para-Military needs of the Wildlife Authority.
- **Heritage Capacity Building:** Provided continuous capacity-building training for regional experts to decentralize heritage registration and ensure a uniform national system.
- **Regulatory Frameworks:** Prepared guidelines to enable private sector participation in heritage maintenance and provided awareness training for heritage owners (institutions) to prevent damage during renovations.
- **Restitution Partnerships:** Engaged Ethiopian embassies, the diaspora, and international "Friends of Ethiopia" to support the legal and diplomatic efforts of restituting looted artifacts.

3.9.3. Future Directions and Strategic Orientations

- **Service Excellence and Value Chain Modernization:** Improve service quality across the entire tourism value chain—from visa issuance to departure. It is essential to modernize procedures and ensure operational excellence to enhance the overall visitor experience.
- **Quality Assurance and Feedback Systems:** Strengthen the systems for tourism service grading, competency certification, and monitoring. Implementing quality improvement programs and a robust tourist feedback mechanism will be key to increasing visitor satisfaction and hospitality standards.
- **Financial Resource Mobilization:** Establish a dedicated Tourism Fund and create strong linkages with financial institutions and development partners. Securing adequate financing is critical for destination development, marketing, branding, service quality improvement, and human resource capacity building.
- **Investment Promotion and Private Sector Role:** Enhance the tourism investment climate by implementing effective incentive systems and providing high-quality information on investment opportunities. This aims to increase the number of domestic and foreign investors while empowering the private sector's role.
- **Synergy and Institutional Capacity:** Accelerate sector development by strengthening vertical and horizontal linkages between the government, the private sector, and all tourism

actors. Improving execution capacity is vital to overcoming core bottlenecks in tourism development.

- **Safety and Security:** Implement a reliable tourist safety and security system to ensure visitors are free from harm or perceived threats. Strengthening peace and security is fundamental to the protection and development of heritage sites and wildlife.
- **Market Diversification and Branding:** Execute effective marketing and promotion strategies to solidify market share in traditional source countries while expanding into new markets. Integrated image-building efforts should be utilized to capture the significant post-COVID global travel demand.
- **National Tourism Resource Mapping:** Conduct a comprehensive mapping of the country's tourism resources to identify the type, size, and distribution of assets. This data will facilitate destination development through an integrated "clustering" approach.
- **Sustainable Infrastructure and Community Benefit:** Expand and modernize infrastructure to make Ethiopia a preferred global destination. Simultaneously, ensure that local communities are actively involved and directly benefit from tourism development.
- **Human Capital Development:** Design and implement strategies and capacity-building programs to bridge skill gaps in the sector and align human resource supply with market demands.
- **Wildlife Conservation Expansion:** Increase the national coverage of protected areas and establish a modernized, organized database for all existing conservation sites.
- **Inclusive Conservation Management:** Encourage the active participation of the private sector, local communities, and NGOs in the management and administration of protected areas.
- **Integrated Protection Systems:** Save national parks and sanctuaries from human-induced pressures by modernizing participatory and integrated protection and control systems.
- **Landscape Restoration and Connectivity:** Adopt an **Integrated Landscape Conservation and Development Approach** to rehabilitate degraded ecosystems. Focus on expanding ecosystem representation and protecting key migratory corridors through community participation.

- **Species Recovery Programs:** Design and implement supportive conservation strategies, such as **semi-in-situ captive breeding programs**, to restore the populations of endangered or dwindling species.
- **Disaster Preparedness:** Develop and apply a comprehensive disaster prevention and readiness strategy to mitigate threats to wildlife and their natural habitats.
- **Human-Wildlife Conflict Mitigation:** Build the institutional capacity necessary to implement the existing strategy for preventing and reducing the impacts of the escalating human-wildlife conflict.
- **Comprehensive Heritage Registration:** Design a heritage registration strategy capable of significantly increasing the documentation coverage of the country's diverse heritage assets.
- **Private Sector Involvement in Heritage:** Develop a specific strategy to increase private sector participation in the maintenance, restoration, and conservation of heritage sites.
- **Coordinated Heritage Governance:** Establish a clear and transparent system of accountability between federal, regional, and local structures regarding heritage registration and protection.
- **Decentralized Capacity Building:** Provide continuous training on heritage registration and research manuals to regional states and stakeholders, enabling local authorities to take full ownership of heritage management.

3.10 Summary of Sectoral Challenges and Constraints

- Low capacity for implementation and enforcement
- Weak tourism marketing, promotion, and image building activities
- Tourism infrastructure and investment not expanding as needed
- Problems in service delivery within the sector
- Weak coordination among sector stakeholders
- Information management system and use of technology
- Weak wildlife conservation and development
- Weak
- conservation and maintenance of cultural heritage

4. Medium-Term Development Plan Implications and Expected Results

4.1 Assumptions of the Plan

- The Ministry, in crafting this three-year sectoral development plan, has taken into account a wide array of diverse global and internal contexts. This medium-term plan is primarily rooted in the 10-year long-term strategic plan and is designed as a detailed roadmap to achieve those decade-long goals with greater precision and effectiveness. Consequently, it was developed by deeply evaluating the performance process of the past three years, identifying successes, performance gaps, and the key challenges that have historically hindered the sector's growth. The needs and demands of regional states and various stakeholders were also foundational to the plan's assumptions. Furthermore, the plan incorporates global tourism development experiences and best practices, adapting them to Ethiopia's objective reality.
- Regarding **Tourism Marketing and Promotion**, the plan anticipates a favorable environment for Ethiopian tourism, driven by the rapid post-COVID-19 global recovery and a significant "pent-up demand." It acknowledges that while African tourism is on the rise, Ethiopia's tourism sector has shown remarkable resilience, overcoming various bottlenecks and demonstrating positive improvements.
- Currently, global tourism has recovered to 64% of its pre-pandemic levels, with a full recovery expected in 2023. Ethiopia's tourism, having been freed from the combined pressures of the pandemic and internal conflict, is showing encouraging progress and is expected to rebound at an even faster pace in the coming years. As global market demands shift, visitor interest in Africa, particularly Ethiopia—including previously untraveled areas—is steadily increasing.
- The plan also assumes that regional frameworks will become more favorable as African nations move toward greater integration. Improvements in visa and customs processes, legal frameworks, and the realization of the **African Continental Free Trade Area (AfCFTA)** are expected to create a conducive environment for growth. This is believed to be vital for creating business linkages, developing integrated infrastructure and tourism products, strengthening collaborative branding, and ensuring the seamless movement of visitors while fostering coordination in wildlife and heritage conservation.

- Although the internal conflict significantly impacted tourist attractions, service providers, and local communities—while also tarnishing the country's image abroad through negative media campaigns—the current peace agreement has significantly reduced travel bans and negative advisories. It is anticipated that Ethiopia's global standing will continue to improve. Various activities are already underway to shift global perceptions, including image-building efforts through diplomatic missions, participation in international trade fairs, and collaborative promotional work with stakeholders.
- **Domestic Tourism** is recognized as a cornerstone for sustainable growth. Drawing from experiences in countries like China, where domestic tourism is a major economic force, the Ministry is giving high priority to this sub-sector. While the culture of leisure travel (distinct from religious pilgrimage) was previously minimal in Ethiopia, current trends show a blossoming interest in domestic travel, which represents a major opportunity.
- The government's recent attention to the sector is highly commendable. This support is evidenced by the establishment of the **Ministry of Tourism** as a dedicated executive body to coordinate regions and the private sector, as well as the development of various new destinations and facilities. Ongoing economic reforms, particularly in the financial and ICT sectors, are expected to further bolster tourism growth.
- Recognizing that tourism development cannot be fully realized through limited government budgets alone—as historical experience has shown—this plan assumes the establishment of a **Tourism Development Fund** to bridge the resource gap. Additionally, the interest shown by bilateral and multilateral institutions, including the World Bank, creates a positive opportunity. To this end, the Ministry is designing various projects to mobilize additional resources.
- While the government may face capacity limitations relative to the vast needs of promotion, destination development, and wildlife/heritage conservation, the plan assumes that additional resources will be generated through diverse channels. From an **Institutional Capacity** standpoint, the Ministry has already deployed staff under a new organizational structure. Future efforts will focus on human resource development, strengthening operational procedures, and improving coordination with regional stakeholders. The completion of pending legal frameworks and the implementation of new strategies are expected to enhance execution capacity.

- Similarly, the **Wildlife Conservation Authority** and the **Heritage Authority** are moving toward more effective performance under their new structures. A renewed focus on research and the return of international researchers to Ethiopia are promising signs. This creates a favorable environment for accountability and the fulfillment of necessary manpower and logistical requirements.
- On a global and national level, there is a positive shift in **Museum Management**. Increased awareness among government bodies, religious institutions, universities, and individuals regarding the value of museums is evident. People are increasingly visiting museums to understand their culture and history. Furthermore, the new educational curriculum's policy of supporting theory with practical experience provides a conducive external environment for museum development.
- Despite these positive assumptions, it is acknowledged that implementing this medium-term plan will face challenges. The primary issue remains the fundamental need for **peace and security**. While the peace agreement in the North is a major step forward, continued stability across all regions is essential; otherwise, tourism, wildlife protection, and heritage conservation efforts will be hindered.
- In terms of **Heritage Conservation**, a shortage of professionals persists. The plan assumes a strategy of upskilling existing staff while recruiting additional experts. By leveraging the capacity of contractors, consultants, and stakeholders, the plan aims for timely and high-quality execution. Strengthening ties with international institutions will also provide essential support in knowledge, technology, and capacity building.
- Finally, while Ethiopia possesses vast natural, cultural, and historical resources, protecting and developing them requires immense investment. Financing the various programs and projects outlined in the plan remains a challenge. Historically, the budget allocated to the sector has not been proportional to its significant economic and social contributions. Therefore, securing adequate funding remains a critical priority for the success of this plan.

4.2 Focus Areas, Strategic Directions, and Goals

4.2.1 Focus Areas and Goals

- **Focus Area 1:** Conservation and Utilization of Natural and Cultural Resources
- **Focus Area 2:** Tourism Destination and Product Development

- **Focus Area 3:** Tourism Market Development
- **Focus Area 4:** Excellence in Tourist Services
- **Focus Area 5:** Institutional Capacity Building

4.2.2 Medium-Term Strategic Goals

1. Strengthen institutional execution capacity, resource utilization, and service delivery systems.
2. Identify the country's tourism potential and develop/expand destinations.
3. Enhance the financial capacity of the sector to expand investment and increase job opportunities.
4. Strengthen international promotion and marketing to increase visitor flow and foreign exchange earnings.
5. Boost domestic tourism to ensure economic and social benefits.
6. Improve and ensure excellence in tourism service delivery.
7. Enhance the conservation of wildlife and their natural habitats.
8. Advance heritage protection, care, and development activities.

4.3 Major Activities and Key Expected Results

4.3.1. Strengthening Institutional Execution Capacity, Resource Utilization, and Service Delivery

- **Major Activity 1:** Improve planning, monitoring, and evaluation systems.
- **Major Activity 2:** Enhance tourism statistics systems and data management processes.
- **Major Activity 3:** Improve human resource development, administration, and efficiency.
- **Major Activity 4:** Enhance finance and property management systems and effectiveness.
- **Major Activity 5:** Improve the effectiveness of partnerships and public relations.
- **Major Activity 6:** Enhance support and monitoring for accountable (subsidiary) institutions and regions.
- **Major Activity 7:** Improve ethics and anti-corruption monitoring activities.
- **Major Activity 8:** Enhance charity and community service initiatives.
- **Major Activity 9:** Improve the participation and benefit of women and social groups.

4.3.2. Identifying Tourism Potential and Developing/Expanding Destinations

- **Major Activity 1:** Identify tourism potential and develop/expand new destinations.
  - *Expected Result:* Standardized, preferred, and competitive tourism destinations.
- **Major Activity 2:** Increase the competitiveness of existing destinations by adding value.
  - *Expected Result:* Enhanced competitiveness of tourism destinations.
- **Major Activity 3:** Expand tourism infrastructure.
  - *Expected Result:* Tourist attractions equipped with recovered and complete infrastructure.
- **Major Activity 4:** Increase the variety and standard of tourist products.
  - *Expected Result:* Improved variety and quality standards of tourist products.

4.3.3. Enhancing Financial Capacity, Investment, and Job Creation

- **Major Activity 1:** Expand and increase domestic and foreign investment.
  - *Expected Result:* Increased tourism investment.
- **Major Activity 2:** Strengthen the financial capacity of the sector.
  - *Expected Result:* Improved financial sources and enhanced efficiency in financial supply and utilization.
- **Major Activity 3:** Increase job opportunities created within the sector.
  - *Expected Result:* Increased job opportunities and citizen benefits in the tourism sector.

4.3.4. Strengthening International Promotion and Marketing

- **Major Activity 1:** Increase international visitor flow and market share through effective promotion.
  - *Expected Result:* Growth in international arrivals, market share, foreign exchange earnings, and an improved national image.
- **Major Activity 2:** Improve the standards and accessibility of Tourist Information Centers.
  - *Expected Result:* Enhanced quality and accessibility of tourist information.
- **Major Activity 3:** Increase online presence through strong digital promotion and marketing.

- *Expected Result:* Increased online coverage and presence.

- **Major Activity 4:** Develop MICE (Meetings, Incentives, Conferences, and Exhibitions) and Stopover tourism.
  - *Expected Result:* Increased volume of business and stopover tourists; enhanced competitiveness in MICE tourism.

4.3.5. Boosting Domestic Tourism for Social and Economic Contribution

- **Major Activity 1:** Enhance domestic tourism by improving the culture of visiting.
  - *Expected Result:* Improved public awareness and travel culture; increased domestic tourist numbers and revenue.

4.3.6. Improving Service Delivery and Ensuring Excellence

- **Major Activity 1:** Enhance the quality and standard of tourist services.
  - *Expected Result:* Improved service quality and increased visitor satisfaction.
- **Major Activity 2:** Increase the capacity and competitiveness of the sector's human resources.
  - *Expected Result:* Enhanced professionalism and increased coverage of trained manpower in the sector.

4.3.7. Enhancing Wildlife and Habitat Conservation

- **Major Activity 1:** Raise public awareness regarding wildlife development, protection, and utilization.
  - *Expected Result:* Increased public awareness.
- **Major Activity 2:** Strengthen law enforcement in wildlife areas and habitats.
  - *Expected Result:* Reduction in illegal activities.
- **Major Activity 3:** Reduce human-wildlife conflict and increase disaster prevention and control readiness.
  - *Expected Result:* Decreased human-wildlife conflict and enhanced disaster management capacity.
- **Major Activity 4:** Strengthen the management and administration of protected areas.

- *Expected Result:* Increased number of protected areas with preserved natural states and stable ecosystems.

- **Major Activity 5:** Enhance the sustainable utilization of wildlife resources.
  - *Expected Result:* Increased sustainable benefits from wildlife resources.
- **Major Activity 6:** Expand wildlife health services.
  - *Expected Result:* Improved accessibility of wildlife health services.

4.3.8. Advancing Heritage Protection, Care, and Development

- **Major Activity 1:** Strengthen heritage registration and management.
  - *Expected Result:* Increased heritage registration coverage and effective administration.
- **Major Activity 2:** Enhance heritage protection and maintenance activities.
  - *Expected Result:* Heritage sites with sustainably preserved values utilized for social and economic services.
- **Major Activity 3:** Strengthen heritage research and museum services.
  - *Expected Result:* Heritages preserved with their values intact; sustainably developed and accessible heritage sites.

5. Strategic Goals, Major Activities, Key Performance Indicators (KPIs), and Targets

No.	Strategic Goals, Major Activities and Key Performance Indicators (KPIs)	Unit of Measurement	2023 Performance (Baseline / 2015 E.C.)	Annual Medium-Term Development Plan Goals		
				2024 (2016 E.C.)	2025 (2017 E.C.)	2026 (2018 E.C.)
1	Strengthen Institutional Execution Capacity, Resource Utilization, and					

	Service Delivery Systems					
1.1	**Improve Planning, Monitoring, and Evaluation Systems**					
1.1.1	Prepare timely and high-quality planning and report documents	Number	5	5	5	5
1.1.2	Establish a Monitoring and Evaluation (M&E) system	Number	1	1	1	1
1.2	**Improve Tourism Statistics Systems and Data Management Processes**					
1.2.1	Established Tourism Satellite Account (TSA) system	Number	-	1	-	-
1.2.2	Tourism Surveys conducted	Number	-	2	2	2
1.2.3	Types of organized tourism data	Number	-	3	4	5
1.2.4	Organize sector data management supported by technology	Percentage	55%	60%	70%	75%
1.3	**Improve Human Resource Development, Administration, and Efficiency**					
1.3.1	Conduct transparent human resource deployment	Percentage	90%	93%	95%	95%

1.3.2	Increase training provided to management and staff	Number	13	12	15	20
1.3.3	Establish an internal incentive system	Number	-	1	-	-
1.3.4	Increase employee satisfaction	Percentage	-	70%	50%	55%
1.4	**Improve Finance and Property Management Systems and Effectiveness**					
1.4.1	Proper utilization of allocated budget (Share)	Percentage	95%	100%	100%	100%
1.4.2	Reduce audit findings involving criticism	Percentage	5%	4%	3%	2%
1.4.3	Increase the share of government electronic payments	Percentage	70%	80%	90%	100%
1.4.4	Increase the share of government electronic procurement	Percentage	50%	80%	85%	100%
1.4.5	Improve customer satisfaction through efficient basic services	Percentage	75%	80%	90%	95%
1.4.6	Reduce property handling and maintenance costs	ETB (Birr)	2.5 Million	2 Million	1.8 Million	1.5 Million
No.	Strategic Goals, Major Activities and Key Performance Indicators (KPIs)	Unit of Measurement	2023 Performance (Baseline / 2015 E.C.)	Annual Medium-Term Development Plan Goals		

				2024 (2016 E.C.)	2025 (2017 E.C.)	2026 (2018 E.C.)
1.5	Improve Information, Communication, and Technology (ICT) Systems and Effectiveness					
1.5.1	Organize database	Percentage	60%	80%	90%	100%
1.5.2	Implement paperless operations within the institution	Percentage	55%	70%	80%	90%
1.5.3	Automate institutional services	Percentage	65%	75%	85%	95%
1.5.4	Increase user satisfaction levels	Percentage	80%	85%	90%	95%
1.5.5	Established internet-supported visitor feedback system	Number	-	1	-	-
1.5.6	Destination Information Management System (DMIS)	Number	-	1	-	-
1.5.7	Technological solutions implemented to modernize the tourism value chain	Number	5	1	2	2
1.5.8	Number of protected areas with network installations	Number	-	2	2	3
1.5.9	Number of protected areas with full internet access	Number	4	4	9	11
1.6	Improve the Effectiveness of					

	Partnerships and Public Relations					
1.6.1	Established Tourism Council	Number	-	1	-	-
1.6.2	Consultative forums conducted with stakeholders	Number	-	3	4	5
1.6.3	Integration/Merger created between tourism and hospitality sector associations	Number	-	1	1	-
1.6.4	Tourism linkages created (Bilateral, Regional, and International)	Number	-	5	10	15
1.6.5	Support obtained through domestic partnerships for institutional capacity building	ETB (Birr)	10 Million	15 Million	20 Million	30 Million
1.6.6	Support obtained through international partnerships for institutional capacity building	ETB (Birr)	34 Million	100 Million	150 Million	200 Million

No.	**Strategic Goals, Major Activities and Key Performance Indicators (KPIs)**	**Unit of Measurement**	**2023 Performance (Baseline / 2015 E.C.)**	**Annual Medium-Term Development Plan Goals**		
				2024 (2016 E.C.)	**2025 (2017 E.C.)**	**2026 (2018 E.C.)**
1.6.7	Ensure information accessibility	Percentage	80%	85%	90%	95%

	through various communication methods					
1.7	**Improve Support and Monitoring for Accountable Institutions and Regions**					
1.7.1	Align and harmonize plans of accountable institutions with the sectoral plan	Number	1	1	1	1
1.7.2	Evaluate quarterly reports of accountable institutions	Number	4	4	4	4
1.7.3	Align and harmonize regional plans with the sectoral plan	Number	1	1	1	1
1.7.4	Conduct joint quarterly sectoral performance evaluations with regions	Number	4	4	4	4
1.7.5	Provide timely capacity-building support to regions	Number	6	8	10	15
1.8	**Improve Ethics and Anti-Corruption Monitoring Activities**					
1.8.1	Rate of corrective actions taken on reported cases of malpractice	Percentage	-	100%	100%	100%
1.8.2	Identify processes vulnerable to	Number	4	5	5	5

	malpractice through study and propose improvements					
1.8.3	Increase the share of leaders and experts who have registered their assets	Percentage	50%	100%	100%	100%
1.9	**Improve Participation and Benefits for Women and Social Groups**					
1.9.1	Increase the number of female employees utilizing childcare services	Number	-	10	15	20
1.9.2	Increase the number of female employees in leadership positions	Number	6	8	8	8
1.9.3	Increase the share of female employees who received training	Percentage	30%	40%	45%	50%
No.	Strategic Goals, Major Activities and Key Performance Indicators (KPIs)	Unit of Measurement	2023 Performance (Baseline)	2024 Goal	2025 Goal	2026 Goal
1.9.4	Create conducive working conditions and environments for employees and	Percentage	80%	90%	95%	97%

	clients with disabilities					
1.10	Improve Charity and Community Service Initiatives					
1.10.1	Conduct "Green Legacy" activities (Seedlings planted)	Number	143,143	200,000	300,000	400,000
1.10.2	Construction of residential houses for vulnerable community members	Number	3	5	8	10
1.10.3	Budget for constructing houses for vulnerable community members	ETB	500,000	2.5 Million	4 Million	5 Million
1.10.4	Support for students from low-income families	Number	30	50	70	100
1.10.5	Budget for supporting students from low-income families	ETB	100,000	1 Million	2 Million	3 Million
1.10.6	Support provided for various social crises	ETB	10 Million	500,000	1 Million	2 Million
1.10.7	Blood donations conducted (Share of total staff)	Percentage	20%	50%	60%	70%
1.10.8	Support for orphaned children	Number	498	250	250	350
1.10.9	Budget for supporting	ETB	252,000	200,000	200,000	300,000

	orphaned children					
2	Identify Tourism Potential and Develop/Expand Destinations					
2.1	Identify Tourism Potential and Develop New Destinations					
2.1.1	Tourism destination development projects prepared for implementation	Number	4	5	5	5
2.1.2	Newly developed tourism destinations	Number	2	5	8	11
2.1.3	Prepared National Tourism Destination Standard	Number	-	1	-	-
2.1.4	Destinations that meet national destination competitiveness standards	Number	-	20	30	40

No.	Strategic Goals, Major Activities and Key Performance Indicators (KPIs)	Unit of Measurement	2023 Performance (Baseline)	2024 Goal	2025 Goal	2026 Goal
2.1.5	National Tourism Resources Mapping	Number	-	1	-	-
2.2	Enhance Competitiveness of Existing Destinations through Value Addition					
2.2.1	Number of existing tourism destinations with added value	Number	6	8	15	20

2.2.2	Improved Ethiopia Global Tourism Competitiveness Rank	Rank	119th	-	-	110th
2.2.3	Types of Niche Tourism Products developed	Number	4	5	5	5
2.3	Expand Tourism Infrastructure					
2.3.1	New infrastructure developments at destinations (attractions)	Number	-	5	7	10
2.3.2	Infrastructure improvements made at tourist destinations	Number	-	10	15	20
2.4	Increase Variety and Standards of Tourist Products					
2.4.1	Identified and market-ready tourism commodities	Number	5	5	5	5
2.4.2	Standardized tourism products	Number	4	3	3	5
3	Enhance Financial Capacity, Expand Investment, and Increase Job Creation					
3.1	Expand and Increase Domestic and Foreign Investment					
3.1.1	Growth in the number of domestic investors	Number	280	150	250	400
3.1.2	Growth in the number of foreign investors	Number	23	30	45	55
3.1.3	Number of investors who took licenses / registered	Number	303	180	295	455
3.1.4	Total investment capital (in Billions)	ETB	-	1.5	2	2.5
3.1.5	Growth in the number of new tourist service provider organizations	Number	55	70	80	100

No.	Strategic Goals, Major Activities and Key Performance Indicators (KPIs)	Unit of Measurement	2023 Performance (Baseline)	2024 Goal	2025 Goal	2026 Goal
3.1.6	Supported investors	Number	125	280	420	635
3.1.7	New standardized guest rooms	Number	1,682	1,800	2,000	2,500
3.2	Increase Job Opportunities Created in the Sector					
3.2.1	Direct jobs created in the sector	Number	104,538	150,000	150,000	150,000
3.3	Strengthen the Financial Capacity of the Sector					
3.3.1	Established Tourism Fund collection system	Number	-	1	-	-
3.3.2	Types of Tourism Fund sources	Number	-	4	3	5
3.3.3	Amount of Tourism Fund collected	ETB	-	-	460 Million	660 Million
3.3.4	Tourism finance utilized	ETB	-	-	200 Million	360 Million
4	Enhance Global Promotion and Marketing to Increase Visitor Flow and Forex					
4.1	Boost Market Share and Tourist Flow through Effective Promotion					

4.1.1	Participation in national promotion platforms (Trade Fairs, Expos, Roadshows)	Number	4	5	8	10
4.1.2	Market linkages created (B2B)	Number	30	50	80	100
4.1.3	Brand/Promotion campaigns executed	Number	5	10	15	20
4.1.4	Designed city and destination brands	Number	2	3	5	5
4.1.5	Permanent tourism promotion and info centers established in missions	Number	-	5	10	15
4.1.6	Events organized abroad to promote Ethiopia	Number	-	3	5	7
4.1.7	Growth in market share	Percentage	-	1%	2%	2%
4.1.8	New emerging markets created	Number	-	1	1	2
4.1.9	Tourist arrival volume	Number	969,000	1,121,008	1,350,436	1,564,586
4.1.10	Foreign exchange revenue	USD	$3.6 Billion	$4.41 Billion	$5.47 Billion	$7.6 Billion
4.1.11	Average daily visitor spending	USD	$234.5	$281.4	-	-
4.1.12	Tourism's share of Gross Domestic Product (GDP)	Percentage	-	-	7.5%	8.0%
No.	Strategic Goals, Major Activities and Key Performance Indicators (KPIs)	Unit of Measurement	2023 Performance (Baseline)	2024 Goal	2025 Goal	2026 Goal
4.2	Improve Tourist Information Center Standards and Accessibility					

4.2.1	Number of users of Tourist Information Centers	Number	6,224	150,755	250,640	340,367
4.2.2	Growth in the quality of tourist information	Number	-	70	80	90
4.3	Increase Online Presence through Strong Digital Promotion and Marketing					
4.3.1	Increased social media/online coverage	Percentage	30%	40%	45%	50%
4.3.2	Enhanced digital payment systems	Percentage	-	80%	90%	100%
4.4	Develop MICE Tourism and Stopover Tourism					
4.4.1	International events held in Ethiopia	Number	12	15	17	20
4.4.2	Professional Conference Organizers (PCOs)	Number	5	5	10	15
4.4.1*	Increased volume of business tourists	Percentage	30%	32%	35%	40%
4.4.2*	Implemented MICE tourism advertising campaigns	Number	-	1	1	1
4.4.3	Implemented Stopover tourism advertising campaigns	Number	-	1	1	1
4.4.4	Volume of Stopover visitors	Number	-	50,000	60,000	75,000

5	Boost Domestic Tourism for Social and Economic Contribution					
5.1	Enhance Domestic Tourism by Improving Travel Culture					
5.1.2	Established tour/travel clubs	Number	45	250	300	450
5.1.3	Domestic tourism campaigns conducted	Number	5	5	7	10
5.1.4	Volume of domestic visitors	Million	37.6	42.2	50.8	51.4
5.1.5	Domestic tourism revenue (in Billions)	ETB	64	68	81	82
6	Improve Service Delivery and Ensure Excellence in the Tourism Sector					
6.1	Enhance Quality and Standards of Tourist Services					
6.1.1	Tourist service provider institutions graded/rated	Number	30	150	150	150
No.	Strategic Goals, Major Activities and Key Performance Indicators (KPIs)	Unit of Measurement	2023 Performance (Baseline)	2024 Goal	2025 Goal	2026 Goal
6.1.2	Tourist service provider organizations monitored and inspected	Number	164	200	200	200
6.1.3	Service provider organizations certified and recognized for competency	Number	463	465	480	520
6.1.4	Organizations implementing Total Quality Management (TQM) systems	Number	-	50	100	200

6.1.5	Increased visitor satisfaction rate	Percentage	60%	65%	70%	75%
6.2	Enhance Human Resource Capacity and Competitiveness					
6.2.1	Professionally certified tourism and hospitality experts	Number	-	500	500	500
6.2.2	Professionals/workforce provided with short-term training	Number	-	50,000	150,000	200,000
6.2.3	Coverage of trained manpower in the sector	Percentage	32%	35%	37%	40%
8	Enhance Conservation of Wildlife and Habitats					
8.1	Strengthen Community Partnership and Participation in Conservation					
8.1.1	Community members benefiting from alternative livelihoods	Number (in thousands)	22	40	45	50
8.1.2	Beneficiary association members	Number	3,200	3,300	3,400	3,500
8.1.3	Individuals reached through face-to-face awareness programs	Number	223,335	200,000	210,000	220,000
8.1.4	Citizens reached through media awareness programs	Number (Million)	10.012	10.012	10.012	10.012
8.2	Increase Law Enforcement in Wildlife and Habitat Protection					
8.2.1	Reduction in illegal activities	Percentage	65%	78%	80%	82%

8.2.2	Protected area coverage free from illegal activities	Percentage	65%	78%	80%	82%
8.2.3	Protection and monitoring activities conducted	Thousand Person-Hours	1,257	2,156	2,158	6,474
No.	Strategic Goals, Major Activities and Key Performance Indicators (KPIs)	Unit of Measurement	2023 Performance (Baseline)	2024 Goal	2025 Goal	2026 Goal
8.2.4	Integrated protection and monitoring activities	Number	25	13	13	14
8.2.5	Established sniffer dog control system	Number	-	1	1	-
8.2.6	Surveillance conducted in areas suspected of wildlife crime	Number	2	2	2	2
8.2.7	Support provided to the Environmental Crime Unit	Number	2	2	2	2
8.3	Increase Readiness for Disaster Prevention and Conflict Control in Wildlife Habitats					
8.3.1	Enhanced disaster prevention and control capacity	Percentage	40%	68%	68%	70%
8.3.2	Fire brigades established in protected areas	Number	1	1	1	1
8.3.3	Constructed fire breaks	Number	53	30	30	30
8.4	Expand Wildlife Research, Studies, and Health Services					
8.4.1	Increased wildlife health service coverage	Percentage	60%	66%	70%	73%
8.4.2	Research and census activities (Self-conducted & Collaborative)	Number	28	31	31	31

8.4.3	Research findings/results utilized	Number	20	21	22	23
8.4.4	National census on critical wildlife species	Number	-	2	2	2
8.4.5	Census on endangered wildlife species (Ethiopian wolf, wild ass, cheetah)	Number	1	1	1	1
8.4.6	Established hydrological system (Abijatta-Shalla Lakes)	Number	-	1	-	-
8.4.7	Controls conducted to prevent the spread of wildlife diseases	Number	6	7	7	7
8.4.8	Vaccinations conducted on livestock to prevent transmissible diseases	Number	73,000	150,000	200,000	250,000
8.5	Enhance Management of Wildlife and Protected Areas					
8.5.1	Increased coverage of wildlife protected areas	Percentage	9.6%	9.7%	9.8%	10.0%
8.5.2	Newly established protected areas	Number	5	2	2	2
8.5.3	Re-demarcation of protected areas	Number	1	-	1	1
8.5.4	Established transboundary common management and ecological linkage systems	Number	1	1	1	1
8.5.5	Management plans prepared for protected areas	Number	5	1	1	-

8.5.6	Protected areas recognized by the IUCN	Number	4	3	3	4
8.5.7	Recovered ecosystems/wildlife habitats	Number	2	2	2	2
8.5.8	Invasive plant species removed	Hectares	300	500	500	500
8.5.9	Breeding centers for endangered species (Semi-in-situ captive breeding)	Number	-	1	1	1
8.6	Enhance Sustainable Utilization of Wildlife Resources					
8.6.1	Revenue from consumptive utilization	Million ETB	65	155	185	215
8.6.2	Revenue from non-consumptive utilization	Million ETB	25	95	115	135
8.6.3	Carbon finance system	Number	-	-	1	1
8.6.4	Measured sequestration of carbon in protected areas	Number	1	1	1	1
No.	Strategic Goals, Major Activities and Key Performance Indicators (KPIs)	Unit of Measurement	2023 Performance (Baseline)	2024 Goal	2025 Goal	2026 Goal
11	Enhance Heritage Conservation and Development Activities					
11.1	Strengthen Heritage Registration and Management					
11.2	Registered movable and immovable heritages	Number	3,304	1,200	1,400	1,400

11.3	Inspections conducted on movable and immovable heritages	Number	423	560	560	560
11.4	Cultural heritages identified at the national level	Number	13	10	5	5
11.5	Nomination dossiers prepared for UNESCO representative listing	Number	9	1	1	1
11.6	Management Plans prepared for national and international heritages	Number	6	2	3	2
11.7	Delineated heritage sites (boundary marking)	Number	5	2	1	-
11.2	Strengthen Conservation and Maintenance of Immovable and Movable Heritages					
11.2.1	Immovable heritages provided with conservation and maintenance	Number	16	20	20	20
11.2.2	Movable heritages provided with conservation and maintenance	Number	826	1,816	1,816	1,816
11.3	Excellence in Heritage Research and Museum Services					
11.3.1	Scientific studies conducted on heritages	Number	-	9	10	10
11.4.1	Published research studies	Number	-	3	3	3
11.4.2	Comparative anatomy collections and exhibitions	Number	-	250	250	250
11.4.3	Increase in the number of museums	Number	-	-	1	-
11.4.4	Temporary exhibitions presented to the public	Number	1	2	5	5

11.4.5	Museums graded according to national standards	Number	6	3	3	3

6. Medium-Term Investment Requirements and Targets

Program Details	Sub-Program Details	List of Projects	Estimated Investment Cost (ETB)	Implementing Institution	Implementing Region	Implementation Method
Tourism Promotion & Marketing	Image Building & International Tourism Promotion	International Tourism Promotion Project	222,800,713	Ministry of Tourism	International (Abroad)	Government-funded
Tourism Destination & Infrastructure	Tourism Destination Development & Product Expansion	National Tourism Resource Mapping Project	97 Million	Ministry of Tourism	All Regions	Government & Development Partners
		Visitor Centers Construction	115 Million	Ministry of Tourism	All Regions	Federal & Regional Gov. Collaboration
		Stopover Rest Areas Development	288 Million	Ministry of Tourism	All Regions	Federal & Regional Gov. Collaboration
		Jimma Abba Jifar Destination Development Project	350 Million	Ministry of Tourism	Oromia	Federal & Regional Gov. Collaboration
		Sof Omar Destination Development Project	150 Million	Ministry of Tourism	Oromia	Federal & Regional Gov. Collaboration
Tourism Investment & Enterprise Development		Community-Based Eco-Lodge Construction	239 Million	Ministry of Tourism	All Regions	Federal Government-funded

Tourism Service Excellence	Tourist Service Quality Improvement	Total Quality Management (TQM) System Implementation Project	84 Million	Ministry of Tourism	All Regions	Federal Government-funded
		Human Resource Capacity Building Project	150 Million	Ministry of Tourism	All Regions	Federal & Regional Gov. Collaboration

Program Details	**Sub-Program Details**	**List of Projects**	**Estimated Investment (ETB)**	**Implementing Institution**	**Region**	**Funding Method**
Wildlife Conservation, Dev. & Utilization	Wildlife Conservation & Development	Infrastructure expansion in protected areas	74.2 Million	Wildlife Conservation Authority (EWCA)	Amhara (Alitash NP)	Federal Budget
		Construction of Ranger residences	56.35 Million	EWCA	Somali, Afar, Oromia, South	Federal Budget
		Office building construction project	39 Million	EWCA	Afar, Oromia	Federal Budget
		Road construction project	37 Million	EWCA	Oromia	Federal Budget
		Nech Sar National Park road construction	78 Million	EWCA	South	Federal Budget

		Digital radio communication for Parks	30 Million	EWCA	13 Protected Areas	Federal Budget
		Water pipeline construction (Awash, Omo, Geraille)	30 Million	EWCA	Specific Protected Areas	Federal Budget
		Reducing Human-Wildlife conflict	943.4 Thousand	EWCA	All Regions	Developme nt Partners
		Reducing illegal wildlife acts/trafficking (outside PAs)	12.17 Million	EWCA	All Regions	Developme nt Partners
		Reducing illegal wildlife acts within PAs	8.34 Million	EWCA	Kafta Sheraro (Tigray/A mhara)	Developme nt Partners
Heritage Conservation & Development	Heritage Care & Development	General Heritage Care Project	75.518 Million	Ethiopian Heritage Authority (EHA)	All Regions	Federal Budget
		Aksum Obelisk World Heritage Site (WHS)	10.4 Million	EHA	Tigray	Federal Budget
		National Museum renovation & landscaping	25 Million	EHA	Addis Ababa	Federal Budget

		Gondar World Heritage Site (WHS)	778.13 Million	EHA	Amhara	Federal Budget
		Aksum Obelisk Consolidation (Strengthening)	115.796 Million	EHA	Tigray	Federal Budget
		Wukro Meskel Kristos Church	62.057 Million	EHA	Tigray	Federal Budget
		Diba Abune Muse Monastery	59.1 Million	EHA	Amhara	Federal Budget
		Deber Belembel Ancient Village	52.07 Million	EHA	Somali	Federal Budget
		Lucy (Dinknesh) Museum construction	111.665 Million	EHA	Afar	Federal Budget
		Cradle of Mankind Museum Construction	**3,203.11 Million**	EHA	Addis Ababa	Federal Budget
Administrative Program	Support & Services	EWCA Office Construction Project	682 Million	EWCA	Addis Ababa	Federal Budget
	Digital & ICT Development	Tourism Satellite Account (TSA)	50 Million	Ministry of Tourism	All Regions	Gov. & Partners

		Heritage Information Tech System	7.6 Million	EHA	Addis Ababa	Gov. & Partners
		Digital Tech Infrastructure Development	40.24 Million	EHA	Addis Ababa	Gov. & Partners

6.1 Detailed Annual Investment Targets by Project

Program & Project Details	**2024 Goal**	**2025 Goal**	**2026 Goal**	**Total (2024-2026)**	**Primary Funding Source**
Tourism Promotion & Market Development					
International Tourism Promotion Project	58,756,100	73,322,500	90,722,113	**222,800,713**	Federal Budget
Tourism Destination & Infrastructure					
National Tourism Resource Mapping	97M	-	-	**97M**	Loans/External
Community-Based Eco-Lodge Construction	50M	90M	99M	**239M**	Federal Budget
Visitor Centers Construction	45M	70M	-	**115M**	Federal Budget
Stopover Rest Areas Development	97M	93M	98M	**288M**	Federal Budget

Tourism Service Excellence					
Total Quality Management (TQM) System	30M	54M	-	**84M**	Federal Budget
Human Resource Capacity Building	-	50M	100M	**150M**	Federal Budget
Wildlife Conservation & Utilization					
Infrastructure Expansion in Protected Areas	-	-	74.2M	**74.2M**	Federal Budget
Construction of Ranger Residences	14.36M	19.63M	22.36M	**56.35M**	Federal Budget
Office Building Construction	12M	12M	15M	**39M**	Federal Budget
Road Construction Projects	10M	12M	15M	**37M**	Federal Budget
Nech Sar National Park Road	-	78M	-	**78M**	Federal Budget
Digital Radio Communication for Parks	-	23M	7M	**30M**	Federal Budget
Water Pipelines (Awash, Omo, Geraille)	-	15M	15M	**30M**	Federal Budget

Reducing Human-Wildlife Conflict	-	-	943.4K	**943.4K**	Aid/Development Partners
Reducing Wildlife Trafficking (External)	-	12.16M	12.16M	**24.32M**	Aid/Development Partners
Reducing Wildlife Crimes (Internal)	-	8.34M	-	**8.34M**	Aid/Development Partners
Heritage Conservation & Development					
Heritage Care Project (General)	75.52M	-	-	**75.52M**	Federal Budget
Aksum Obelisk WHS	10.4M	-	-	**10.4M**	Federal Budget
National Museum Renovation	25M	-	-	**25M**	Federal Budget
Gondar World Heritage Site	-	778.13M	-	**778.13M**	Federal Budget
Aksum Obelisk Consolidation	115.8M	-	-	**115.8M**	Federal Budget
Wukro Meskel Kristos Church	-	-	62.06M	**62.06M**	Federal Budget
Diba Abune Muse Monastery	-	-	59.1M	**59.1M**	Federal Budget
Administrative & Digital Program					

EWCA Office Construction Project	-	477M	205M	**682M**	Federal Budget
Tourism Satellite Account (TSA)	30M	20M	-	**50M**	Federal Budget
Heritage IT System	7.6M	-	-	**7.6M**	Federal Budget
Digital Tech Infrastructure Development	40.24M	-	-	**40.24M**	Federal Budget

7. Plan Implementation Strategies

To implement this plan effectively, the following implementation strategies will be applied:

Building Capacity for Execution and Implementation

- Conducting sectoral and institutional transformation or reforms.
- Implementing policy and legal amendments.
- Enhancing service delivery by empowering professionals in the service sector through short, medium, and long-term training.
- Expanding alternative sources of financing.
- Strengthening sectoral organizations (professional and trade associations).
- Increasing the use of digital technology, modernizing the data management system through technology, and developing modern, user-friendly applications.

Strengthening Linkages Among Sector Actors and Enhancing Coordination with Partners and Stakeholders.

To strengthen the coordinated operations of sector actors, special attention will be given to the following:

- Expanding linkages with research and study institutions (strengthening ties with universities).

- Strengthening coordination with Non-Governmental Organizations (NGOs).
- Supporting and strengthening the standing of the private sector through operational frameworks.
- Strengthening the individual capacity of the four key actors in the sector and enhancing their mutual linkages.
- Enhancing coordinated practices regarding the proper utilization of national resources.
- Strengthening work relationships and linkages with other countries, as well as regional and international organizations.

Strengthening Community Participation and Benefit

- Enabling active community participation by creating awareness among communities located at tourist destinations and attractions regarding heritage conservation and natural resource protection.
- Fostering a sense of ownership among the community—who are the owners of tourism resources—to protect and care for these assets by creating conducive environments for organized participation and ensuring they share in the benefits of tourism development.
- Implementing frameworks and projects that enable community-based tourism activities and ensure sustainable tourism development.

Increasing the Role of the Private Sector in Sector Development

The following issues will be prioritized under this objective:

- Creating conducive environments and procedures that help enhance investor participation in the sector.
- Establishing operational systems that enable the strengthening of Public-Private Partnerships (PPP).
- Identifying alternative fields of work and providing support for their implementation.
- Strengthening the partnership between the government and the private sector.

8. Risk Assessment and Mitigation Strategies

8.1 Risk Assessment

It is essential to identify the obstacles that have hampered performance in past years through systematic study. This involves recognizing factors that pose a threat to the proper execution of activities and indicating the necessary solutions and measures to overcome these challenges in the future. Primarily, it is recognized that the ongoing lack of peace and security in the country remains the core risk for the sector. By its very nature, tourism requires a peaceful environment to thrive. Furthermore, the absence of sufficient budget support has historically made it difficult to execute plans as intended. To address these challenges, the Ministry, in collaboration with stakeholders and accountable institutions, has planned a variety of interventions.

The following risks are assumed to potentially hinder the effective implementation of the sector's Medium-Term Development Plan (2024–2026):

- The internal peace and security situation of the country.
- The lack of compensation for the devastation caused by COVID-19 and similar pressures, which makes it difficult to resume operations at the previous pace.
- Economic fluctuations occurring both nationally and globally.
- The tendency to perceive the sector's national benefit as low, primarily because the exact revenue generated and the number of jobs created from tourism are difficult to estimate accurately.
- High rates of professional turnover and frequent changes in leadership.
- The absence of stable global economic growth and the volatility of foreign exchange rates.
- Severe shortages in development budgets, which prevent the ability to carry out development work in all potential locations.
- The vulnerability of wildlife and their habitats to various natural and man-made disasters including prolonged droughts, floods, forest fires, landslides, pollution, and the spread of diseases noting that the frequency of these incidents is increasing over time.

8.2 Strategies for Risk Mitigation

- Engage in activities that reduce conflict and prioritize preventive measures to ensure that tourism resources are not damaged. Conduct promotional work and expand domestic tourism in areas that are not affected by conflict.
- Identify and promote specific areas of focus, giving special attention to locations where problems have not occurred.
- Implement the Tourism Satellite Account (TSA) and collect timely information from credible organizations.
- Keep professionals on the job by providing incentives, support, and creating a conducive working environment.
- Design and implement plans that take into account the constantly fluctuating economic and foreign exchange conditions; additionally, work on expanding domestic tourism activities.
- To mitigate the aforementioned risks, establish collaborative and integrated working relationships with accountable institutions, stakeholders, and other partner development organizations.

9. Monitoring and Evaluation Procedures and Systems

The implementation of the prepared three-year (Medium-Term) Development Plan can only be successful if an appropriate Monitoring and Evaluation (M&E) system is designed to measure performance and results. The execution of this system will follow the organizational structure of the Ministry and its accountable institutions, involving both performers and leadership at various levels.

Therefore, it is necessary for the Ministry and accountable institutions to establish and implement an appropriate supervision, monitoring, and evaluation system to realize the planned strategic result areas. The M&E system will serve as a primary tool to improve the implementation level of programs and projects designed to monitor the three-year (2024–2026) Medium-Term Development and Investment Plan, ensuring that expected results are achieved. Furthermore, it will establish transparency and accountability among planning and executing bodies, allowing for the correction of weaknesses and the strengthening of successes. Consequently, an effective M&E

system tailored to the sector's reality will be established to maintain progress, correct shortcomings, and achieve better results.

9.1 Components of Plan Implementation Monitoring and Evaluation

The implementation of the plan will be consistently executed through M&E report formats and reporting schedules. By collecting and analyzing performance data and preparing reports, timely corrective decisions will be made. Since tourism requires the participation of many stakeholders, performance reports will be made accessible to all relevant parties. Conducive conditions will be created for stakeholders to participate in plan evaluations, and the Ministry will work to ensure that accountable institutions are operating according to the plan. The primary monitoring and evaluation methods will include regular reporting, physical evaluations, and continuous supervision activities.

Accordingly, reports will be prepared to track the strategic goals and Key Performance Indicators (KPIs) to be achieved annually and at the end of the planning period, broken down by every performance activity within each key task. To facilitate this, expected results for the planning period have been set, and a planning framework showing annual goals, major activities, and targets has been prepared to monitor movements toward main objectives. The M&E system will be implemented by considering the following core issues, while also conducting timely performance monitoring of accountable institutions:

- **Ensuring Transparency and Accountability:** Establish a reliable and consistent information system. To ensure inclusivity, quarterly, semi-annual, and annual evaluation forums will be organized involving the relevant accountable institutions for each major activity. This will allow identified limitations to be corrected and strengths to be enhanced. The M&E will also focus on tracking job creation and strengthening data collection regarding service quality by gathering feedback from stakeholders and tourists. Efforts will be made to resolve any grievances arising in the tourism sector in coordination with relevant bodies and to establish a system that prevents their recurrence.
- **Verifying Project Implementation at All Levels:** A joint quarterly forum will be held to monitor the performance of projects carried out by the Ministry, support organizations, and accountable institutions. By preparing a project performance evaluation framework, a

forum will be conducted involving all relevant stakeholders including federal and regional government bodies, private investors, and support organizations to review project progress and implementation. Field-based evaluations involving all stakeholders will also be conducted. Based on these evaluations, feedback and adjustments will be provided, and projects will be monitored until completion. Additionally, support will be provided to correct gaps and obstacles identified through regular reports, studies, and field visits. The budget allocated to the sector will be clearly disclosed according to Ministry of Finance guidelines, and regular M&E will be conducted to ensure that all departments are utilizing their assigned budgets correctly.

- **Learning Lessons and Scaling Best Practices:** The Ministry will work to strengthen work relationships with all development partners and stakeholders. It will follow strategies to ensure private sector participation and ensure that stakeholders at regional levels are involved in the planning and implementation process. Best practices identified in various areas will be documented and scaled up through support as necessary. By ensuring stakeholders have sufficient awareness of sector policies and strategic laws, the Ministry will enhance their role and ensure the effective implementation of policies and regulations.
- **Building Monitoring and Evaluation Capacity:** Capacity limitations observed among performers, middle management, and senior leadership will be addressed by solving problems related to attitude, skill, and resource supply. Regular support and monitoring activities will be conducted for regions, accountable institutions, and stakeholders. Furthermore, feedback provided by the Trade and Tourism Affairs Standing Committee of the House of Peoples' Representatives (HPR) and the Prime Minister’s Office on periodic reports will be used as a supportive tool to ensure implementation according to the established action plan.













THE FEDERAL DEMOCRATIC REPUBLIC OF ETHIOPIA

SUSTAINABLE TOURISM MASTER PLAN





2015
2025

THE FEDERAL DEMOCRATIC REPUBLIC OF ETHIOPIA

SUSTAINABLE TOURISM MASTER PLAN 2015 – 2025

MINISTRY OF CULTURE AND TOURISM



United Nations
Economic Commission for Africa

Copyright ©2015
United Nations Economic Commission for Africa
www.uneca.org

All rights reserved.
The text and data in this publication may be reproduced as long as the source is cited. Reproduction for commercial purposes is forbidden.

Disclaimer
This report is the result of the analysis of a study commissioned by the United Nations Economic Commission for Africa (UNECA), Eastern Africa Sub-Region Office (SRO-EA) . However, the report does not purport to represent the views or the official policy of the institution.

MAP OF THE FEDERAL DEMOCRATIC REPUBLIC OF ETHIOPIA

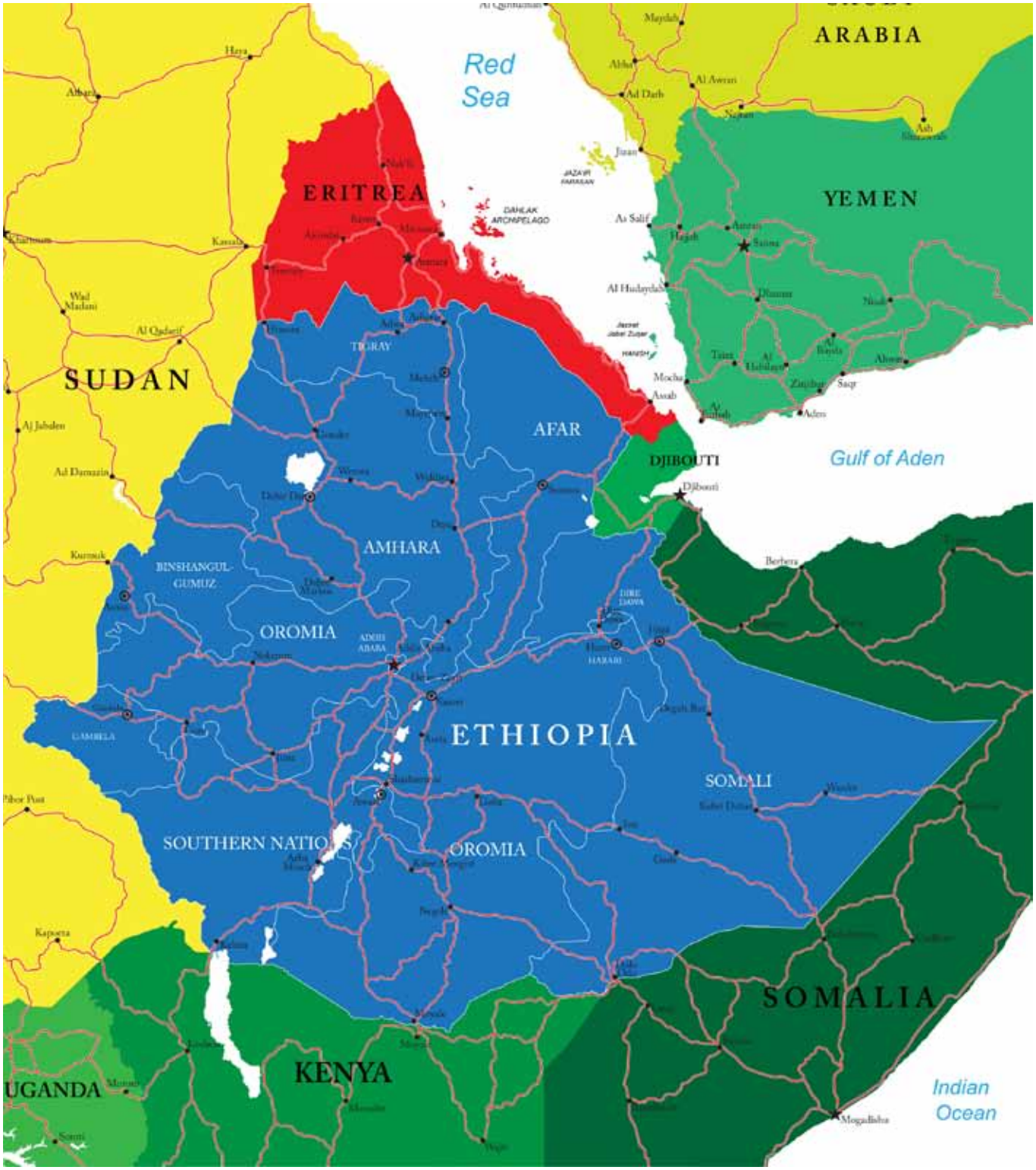


TABLE OF CONTENTS

Map of the Federal Democratic Republic of Ethiopia 5

List of figures 10

List of tables 11

Foreword 12

Acknowledgement 13

List of acronyms and abbreviations 14

EXECUTIVE SUMMARY 18

1. INTRODUCTION 26

2 SITUATIONAL ANALYSIS 32

2.1 Global Tourism Outlook 32

2.1.1 World Tourism Receipts 35

2.2 The Tourism Industry in Ethiopia 36

2.3 Competitive Analysis of Ethiopia's Travel and Tourism Industry 37

2.4 Tourism Trends and Markets 40

2.5 The Current Tourism Supply in Ethiopia 45

2.5.1 Tourism Resources and Products 45

2.5.2 Current Tourism Routes and Products 56

2.5.3 Some Segmented Tourism Products 57

2.5.4 Summary of Key Issues 63

2.6 Tourism Marketing and Promotion 63

2.7 Tourism Infrastructure 66

2.7.1 Summary of Key Issues 68

2.8 Human Capital and Resources 69

2.8.1 Summary of Key Issues 70

2.9 Tourist Safety and Security 73

2.10 Tourism Support Services and Infrastructure 74

2.10.1 Transport Infrastructure 74

2.10.2 Information and Communication Technology 81

2.10.3 Summary of Key Issues 83

2.11 Environmental Conservation and Sustainable Tourism Development 84
2.12 Policy, Regulatory and Institutional Framework 88
2.12.1 Summary of Key Issues 91
2.13 Tourism Research and Development 92
2.14 Tourism Development Financing 93
2.15 Summary of Ethiopia's Tourism Sector SWOT Analysis 95

3 VISION, MISSION AND SHARED VALUES 100
3.1 The Vision and Mission for Ethiopia's Tourism Industry 100
3.2 The Shared Values 100

4 STRATEGIES AND ACTIONS 104
4.1 Introduction 104
4.2 Pillar One: Policy, Regulation and Institutional Framework 108
4.2.1 Introduction 108
4.2.2 Strategies and Actions 108
4.2.3 Framework for the Strategic Pillar 111
4.3 Pillar Two: Tourism Product Development 112
4.3.1 Introduction 112
4.3.2 Actions 112
4.3.3 Framework for the Priority Area 118
4.4 Pillar Three: Tourism Marketing, Branding and Promotion 120
4.4.1 Introduction 120
4.4.2 Actions 120
4.4.3 Framework for the Strategic Programme 123
4.5 Pillar Four: Investment in Tourism Facilities and Services 124
4.5.1 Introduction 124
4.5.2 Actions 124
4.5.3 Framework for the Pillar 128
4.6 Pillar Five: Human Resource Development 128
4.6.1 Introduction 128
4.6.2 Actions 128
4.6.3 Framework for the Pillar 130

4.7 Pillar Six: Tourism Research and Development 131
4.7.1 Introduction 131
4.7.2 Actions 132
4.7.3 Framework for the Programme Area 132
4.8 Pillar Seven: Tourist Safety and Security 133
4.8.1 Introduction to the Priority Area 133
4.8.2 Actions 134
4.8.3 Framework for the Programme Area 134
4.9 Pillar Eight: Tourism Support Infrastructure and Services 135
4.9.1 Introduction 135
4.9.2 Actions 135
4.9.3 Framework for the Priority Area 135
4.10 Pillar Nine: Conservation and Preservation of Natural and Cultural Resources 136
4.10.1 Introduction 136
4.10.2 Actions 136
4.10.3 Framework for the Pillar 139
4.11 Pillar Ten: Tourism Development Financing 140
4.11.1 Introduction 140
4.11.2 Actions 140
4.11.3 Framework for the Programme Area 141

5 STMP IMPLEMENTATION FRAMEWORK 145

5.1 Summary of STMP Implementation Road Map 163
5.2 STMP Financing Requirements 165
5.3 STMP Implementation Monitoring and Evaluation Plan 165
5.4 Tourism Industry Growth Projections 166
5.5 Institutional Framework for STMP Implementation 168

6 BIBLIOGRAPHY 172

7 GLOSSARY OF KEY TERMS 177

8 APPENDICES 181

1.0 Methodological Note 181

1.1 STMP Formulation Activity Plan 183

1.2 List of Tourism Development Initiatives Considered in the STMP Formulation 184

1.3 List of Organisations Consulted 185

1.4 Stakeholders Consultation Data Collection Tool 190

1.5 Summary of Field Missions Undertaken 192

1.6 List of Benchmark Cases Considered 193

2.0 Ethiopia's Ministry of Culture and Tourism Organisational Chart 195

3.0 Protected Wildlife Areas in Ethiopia 196

PHOTO CREDITS 198

LIST OF FIGURES

	Map of the Federal Democratic Republic of Ethiopia	5
Figure 2.1	World: International Visitors Arrival between 1995-2012 (million)	32
Figure 2.2	Modes of Travel for International Arrivals, 2013 (%)	34
Figure 2.3	Inbound Tourism by Purpose of Visit, 2013	34
Figure 2.4	Direct Contribution of T&T to GDP (ETB, m)	36
Figure 2.5	Total Contribution of T&T to GDP (ETB, million)	37
Figure 2.6	The Most Problematic Factors for Doing Business in Ethiopia (2013)	39
Figure 2.7	International Arrivals and Visitor Exports (USD) between 2004 and 201	40
Figure 2.8	Ethiopia: International Tourist Arrivals 1990-2013 (to the nearest '000)	41
Figure 2.9:	Top Ten Markets for Ethiopia (2009-2012)	42
Figure 2.10	Ethiopia: Growth Trajectory for Visitors by Purpose of Travel (2001-2012)	43
Figure 2.11	Ethiopia's International Tourist Arrivals and Receipts 2010-2012	44

LIST OF TABLES

Table 1.1:	Indicative Cost Estimates of Implementing the Ethiopia STMP (2015-2025)	23
Table 2.1	World: International Visitors Arrival by UNWTO Regions between 1995-2012	33
Table 2.2	World: International Tourist Receipts	35
Table 2.3	Ethiopia's Global T&T Competitiveness Relative to Selected Sub-Saharan Africa Countries (out of 140 Economies).	38
Table 2.4	Tourist Arrivals 2008-2012	41
Table 2.5	Ethiopia: International Arrivals by Purpose of Visit- 2001 to 2012	43
Table 2.6	Ethiopia's Tourism Comparative Performance (2010-2012)	44
Table 2.7	Ethiopia UNESCO World Heritage Sites	45
Table 2.8	Leading MICE Destinations in Africa, 2012	57
Table 2.10	Distribution of Classified Hotel Rooms in Ethiopia	67
Table 2.11	WEF TTCI Select Human Resource Indications of Select Countries	70
Table 2.13	Global Ranking of the State of Infrastructure in Selected African Countries	74
Table 2.14	Ethiopia Air Transport Infrastructure Assessment (by 2013)	75
Table 2.15	GTP Targets for Roads	78
Table 2.16	Competitiveness of Ethiopia ICT Infrastructure	82
Table 2.17	Deforestation and Biodiversity for Selected East Africa Countries 2008	84
Table 2.18	T&T Policy, Rules and Regulations Ranking for Select African Countries (2013)	88
Table 2.19	2013 Ease of Doing Business Global Ranking for Select Africa States	90
Table 5.1	Indicative Cost Estimates of Implementing the Ethiopia STMP (2015-2025)	165
Table 5.2	STMP Monitoring and Evaluation Plan	166
Table 5.3	Ethiopia Tourism Growth Projections by 2025	166
Table 5.4	Summary of Ethiopia Tourism Growth Drivers towards (2015-2025)	167
Table 5.5	Institutional Framework for STMP Implementation	168

FOREWORD



Ethiopia is one of the fastest growing economies in the world, having registered impressive economic growth for the last consecutive twelve years. As part of its resolve to achieve various economic, social and political goals, the government of Ethiopia is investing heavily in large scale social and infrastructural projects aimed at bringing about institutional transformation. The implementation of the first integrated Growth and Transformational Plan has already proved its calibre in achieving all of the millennium development goals. The second Growth and Transformation Plan has been developed with the ultimate goal of attaining middle class income status by 2025.

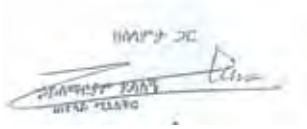
Ethiopia is a country with untapped tourism potential. The contribution of tourism to the overall development is, therefore, well recognised and is given significant attention in the Growth and Transformation Plan. Ethiopia is currently experiencing rapid growth in international tourism. This is a result of the remarkable socio-economic reforms and diligent endeavours and commitment of the Government of the Federal Democratic Republic of Ethiopia. Tourism is a sector that holds a bright promise for our country Ethiopia.

That is why the Ministry of Culture and Tourism has placed considerable emphasis on developing and managing tourism in a competitive and sustainable way. The Ministry has collaborated with the Eastern Africa member states under the umbrella of IGAD in developing a Regional Sustainable Tourism Master Plan, 2013-2023. The Sustainable Tourism Master Plan for Ethiopia (ESTMP) is, therefore, a follow-through to the government's commitment to guaranteeing that the tourism sector contributes to the country's socio-economic development.

The Master Plan sets out a vision for sustainable tourism development in the country and includes strategic programmes, priority projects, and activities in a 10 years implementation framework. In this sense, it marks an important milestone for the systematic development of Ethiopia. Needless to say, the country recognises the need for action if tourism is to play its part in Ethiopia's development agenda as envisioned in the Growth and Transformational Plan, 2015-2020. The government of Ethiopia is deeply committed to exert every effort necessary to implement the ESTPM and further calls for the strong commitment, effort and practical involvement of the private sector, civil society, community and development partners in its implementation and monitoring.

I would like to extend my government's gratitude for the financial and technical assistance provided to the Ministry of Culture and Tourism by the United Nations Economic Commission for Africa through their Sub-Regional Office for Eastern Africa. I would also like to express my sincere gratitude to all of the shareholders who in various ways, participated in the successful formulation of this Sustainable Tourism Master Plan.

Finally, I would like to take this opportunity to invite visitors from all over the world to experience the new face of Ethiopia, its abundant wealth of cultural and natural heritages, and the genuine hospitality of the Ethiopian people.



His Excellency Hailemariam Desalegn Boshe
The Prime Minister
Federal Democratic Republic of Ethiopia

ACKNOWLEDGEMENT

This Sustainable Tourism Master Plan is a product of comprehensive stakeholder consultations across the country and a number of consultative meetings including four regional and national meetings and several ad hoc meetings. What is more, the master plan benefited from regional lessons of best practice during the regional expert group meeting held in Addis Ababa. The master plan has further been enriched by both a peer process undertaken by national tourism experts and stakeholders.

The formulation of the Master Plan has been enabled through the technical and financial assistance from the United Nations Economic Commission for Africa (UNECA) Sub-Regional Office for Eastern Africa. In particular, the process of formulating the master plan was led by Rayviscic Mutinda under the guidance of Geoffrey Manyara and Daya Bragante and direct supervision of the leadership of Ministry of Culture and Tourism. Overall leadership for the formulation process was provided by Antonio Pedro, the Director UNECA SRO-EA. Special thanks go to the staff of the Ministry of Culture and Tourism for their unwavering support, in particular, in organising the stakeholder interviews and consultative forums across the country and the provision of technical inputs at different stages of the ESTMP development.

Finally, UNECA and the Ministry of Culture and Tourism of the Federal Democratic Republic of Ethiopia would like to extend their utmost gratitude to tourism experts drawn from the IGAD region, and all other esteemed tourism stakeholders including government officials, private sector representatives, members of civil society and academia, for their constructive criticism, insights, information and advice that contributed immensely to the development of this master plan.

Ministry of Culture and Tourism

LIST OF ACRONYMS AND ABBREVIATIONS

AfDB	African Development Bank
ARCCH	Authority for Research and Conservation of Cultural Heritage
ATMs	Automated Teller Machines
AU	African Union
BDP	Bilateral Development Partners
BRICS	Brazil, Russia India, China, South Africa
CEWARN	Conflict Early Warning and Response Mechanism
CPD	Continuous Professional Development
CRS	Computer Reservation Systems
CTTC	Catering and Tourism Training Centre
CVB	Convention and Visitor Bureaus
DMS	Destination Management System
ECAA	Ethiopian Civil Aviation Authority
EIC	Ethiopia Investment Commission
EPA	Environment Protection Authority
ETB	Ethiopian Birr
ETO	Ethiopian Tourism Organisation
EWCA	Ethiopian Wildlife Conservation Authority
FDI	Foreign Direct Investment
FIFA	Fédération Internationale de Football Association
GDS	Global Distributions Systems
GPS	Geographical Positioning System
GTP	Growth and Transformational Plan
GVA	Gross Value Added
HR	Human Resource
HRD	Human Resource Development
ICCA	International Congress and Convention Association
ICT	Information and Communication Technology
IFC	International Finance Corporation
IGAD	Inter-Governmental Authority on Development
ITB	International Tourism Bourse
ITU	International Telecommunication Union
LAPSSET	Lamu Port South Sudan Ethiopia Transport Corridor
MDG	Millennium Development Goals
MCIT	Ministry of Communication and Information Technology

MICE	Meetings Incentives Conferences and Exhibitions
MoCT	Ministry of Culture and Tourism
MoFA	Ministry of Foreign Affairs
MoUDHC	Ministry of Urban Development and Housing Construction
NIC	National Incubation Centres
NTDP	National Tourism Development Policy
ODI	Overseas Development Institute
PPP	Public Private Partnership
PTAs	Priority Tourism Areas
SMS	Short Message Service
SNNPR	Southern Nations, Nationalities and Peoples' Region
STMP	Sustainable Tourism Master Plan
TDF	Tourism Development Fund
TIC	Tourist Information Centres
TVC	Tourism Value Chain
TVCM	Tourism Value Chain Mapping
TVET	Technical Vocational Education and Training
TSA	Tourism Satellite Account
TTC	Tourism Transformation Council
TTCI	Travel and Tourism Competitiveness Index
UNECA	United Nations Economic Commission for Africa
UNESCO	United Nations Educational, Scientific and Cultural Organisation
UNWTO	United Nations World Tourism Organisation
VOIP	Voice Over Internet Protocols
WEF	World Economic Forum
YD	Yamoussoukro Decision



Ethiopia first participated in the Olympic games in 1956.

PHOTO: Muktar Edris of Ethiopia celebrates his 5000 metres victory of the 20th World Junior Athletics Championships at the Olympic Stadium on July 14, 2012 in Barcelona, Spain.


adidas
OPIA
KO
9

EXECUTIVE SUMMARY

Introduction

As a result of sweeping economic reforms, the Federal Democratic Republic of Ethiopia (FDRE) has been enjoying unprecedented tourism growth in the recent years. International tourist arrivals have been on a growth trajectory since the 90s rising from 64,000 in 1990 to 681,249 in 2013. This has been matched by growth in the contribution of the travel and tourism sector's direct contribution to the country's GDP which in 2013 was 4.2%, translating to ETB 35,766.6m and is expected to grow by 4.8% p.a. reaching ETB 59, 495.2m (3.6% of GDP) by 2024.

Further, the industry is now an important source of employment accounting for 3.8% of total employment in 2013 representing 985,500 jobs directly and this is forecast to grow by 0.1% in 2014 to 986,000 (3.6% of total employment). Such performance has seen the tourism industry increasingly becoming an important economic sector in the country and has consequently been identified as an avenue through which the plan for accelerated and sustainable development to end poverty can be achieved, as articulated in the country's Growth and Transformation Plan (GTP), (2010-2015) vision to:

> *"Build an economy that has a modern and productive agricultural sector with enhanced technology and an industrial sector that plays a leading role in the economy, sustaining economic development and securing social justice and increasing the per capita income of the citizens so as to reach the level of those in the middle-income countries."*

As pertains to the tourism sector, the GTP aims at doubling the tourist arrivals from 500,000 to 1 million, and a twelve-fold increase in tourist expenditures from 250 million USD in 2010 to 3 billion in 2015. The Government is also now in the process of embarking on the second GTP which seeks to propel the country to middle income status by 2025. Accordingly, building on the success of the GTP1, GTP2, further sets high targets for the tourism sector to be achieved by 2025. Of course, while these targets may seem ambitious, they fully reflect the aspirations of the country becoming 'One of the Five Top Destinations in Africa by 2020'.

To help ensure that tourism growth delivers broad and equitable social, economic, and environmental benefits, the government of the FDRE adopted the National Tourism Development Policy (NTDP) in 2009 with a vision:

> *"To see Ethiopia's tourism development led responsibly and sustainably and contributing its share to the development of the country by aligning itself with poverty elimination."*

The NTDP sets the sector's general objectives that places emphasis on the tourism's potential in terms of growth, employment generation (particularly for women and youth), foreign exchange earnings, and image building for the country. It also stresses the importance of achieving tourism growth sustainably, in alignment with other national development policies and with broad participation by the different stakeholders. In this context, the Ministry of Culture and Tourism (MoCT)—the agency mandated by FDRE to oversee the systematic development of tourism—prepared the Sustainable Tourism Master Plan (STMP) with financial and technical support from the UN Economic Commission for Africa (UNECA) Sub-Regional Office for Eastern Africa.

Mission and vision of the Ethiopian STMP

This sustainable tourism master plan sets the **vision** for Ethiopia's tourism that Ethiopia becomes one of the top five tourist destinations in Africa by 2025.

The **mission** of the ESTMP is to develop Ethiopia's tourism to maximise its contribution to the country's economic development, preserving Ethiopia's rich cultural and natural heritage, and providing the warmest of hospitality, excellent value for money and memorable, authentic experiences to every visitor. This vision, mission and goal shall be pursued under the **shared values**.

Shared values

- Community participation and empowerment
- Respect for the cultural integrity and environmental health of the resources
- Gender mainstreaming
- Stakeholder partnership
- Respect for the federal system of governance in Ethiopia

Christianity in Ethiopia dates to the 1st century AD, and this long tradition of Christianity makes Ethiopia unique amongst sub-Saharan African countries.

PHOTO: A priest holding a crucifix.

Guiding principles, aims and strategic objectives of the ESTMP

The STMP adopts the NTDP vision for tourism in Ethiopia and its specific objectives as the base guiding principles and uses an integrated model of tourism planning including *Destination competitiveness and sustainable tourism development* approaches. Specifically, the STMP is guided by the following underlying principles:

The main aim of this STMP is to establish a national framework for sustainable tourism development with a view to contributing to socio-economic development and poverty alleviation. The STMP therefore, sets out 10 Strategic pillars, priority projects and activities in a long-term implementation framework covering 2015–2025. These are broken down into short term, medium term and long term planning horizons.

1. Tourism planning should adopt a system approach to development focusing not only on the development processes but also on the necessary inputs and outputs.
2. Tourism development should be sustainable providing equity for both inter-generational, (whereby the current exploitation of tourism resources should not compromise the ability of future generations), and intra-generational, taking into account issues relating to enhancing social justice and poverty alleviation.
3. The STMP should enhance the competitiveness of the country as a tourist destination by building on the existing unique aspects of each individual region that should complement the country's overall image and creation of synergies in areas of common tourism interest.
4. The STMP should provide strategies that would reduce the level of tourism economic leakages while at the same time enhancing tourism economic linkages and multiplier effect through sound value chain development policies.
5. The STMP should provide strategies in line with the wider national, regional, continental and international development initiatives and economic development plans.
6. Tourism development should be guided by sound research. The STMP should, therefore, provide a mechanism for skills, knowledge and technology transfer among member states with a view to enhancing sustainability, human capital and regional competitiveness.

Key objectives for the strategic pillars

01

Policy, Regulation and Institutional Framework

- Establish and improve framework for formulation and implementation of tourism policies and regulations
- Strengthen and harmonise public sector institutions
- Strengthen private sector institutions
- Strengthen public-private collaboration
- Strengthen linkages with other sectors

02

Tourism Product Development

- Enhancing the appeal of the country's existing tourism products
- Expanding and diversifying the country's tourism product
- Develop inter-regional tourism product
- Create a framework for tourism product development

03

Tourism Marketing, Branding and Promotion

- Intensifying the country's appeal in the current target market segments.
- Diversification of the country's tourist market
- Build a national brand that improves and entrenches the image of the country as a tourist destination
- Disseminate and manage destination information
- Establish institutional and strategic frameworks for marketing the country

04

Investment in Tourism Facilities and Services

- Enhance the capacity of the existing tourist services and facilities
- Create a conducive environment to encourage investments in the tourism sector
- Promote investment opportunities for tourism services and facilities

05

Human Resource Development

- Address the short-term HR needs for the tourism sector
- Build a long-term supply of globally competitive human resource for the tourism sector



06

Tourism Research and Development

- Create a framework for tourism research and development within the country

07

Tourist Safety and Security

- Design and develop a tourism safety and security strategy

08

Tourism Support Infrastructure and Services

- Engender tourism industry development focus in national and regional infrastructure development

09

Conservation and Preservation of Natural and Cultural Resources

- Enhancing the conservation and preservation of natural and cultural resource

10

Tourism Development Financing

- Institutionalise the mobilisation of financial resources to fund tourism development
- Design strategies to mobilise financial resources to fund tourism development under the TDF framework

These strategic pillars and key objectives are organised to produce a coordinated response to future industry growth and emphasises their inter-relationships and equal importance.

In line with the projections of GTP2, sthe STMP has set a high growth target of 5 million international visitors in 2025. Based on this high growth scenario, receipts from international arrivals is projected to increase from a baseline of ETB 14.197 billion in 2012 to ETB 180 billion in 2025, with the corresponding number of tourism-related jobs rising from 985,500 to 4.8 million.

To ensure that this growth is realised in a competitive and sustainable manner, the master plan includes 10 strategic pillars with an indicative cost of ETB 5.306 billion distributed as shown below.

Table 1.1: Indicative Cost Estimates of Implementing the Ethiopia STMP (2015-2025)

SPS/No	Strategic Pillar	Estimated Cost (ETB m)
1	Policy, Regulatory and Institutional Framework	166
2	Tourism Product Development	1,602
3	Tourism Marketing and Promotion	951
4	Investment in Tourism Facilities and Services	957
5	Human Resource Development	606
6	Tourism Research and Development	52
7	Tourist Safety and Security	130
8	Tourism Support Infrastructure and Services	155
9	Conservation and Preservation of Natural and Cultural Resources	814
10	Tourism Development Financing	23
	Total	**5,466**





Addis Ababa is an Amharic word that means new flower. The site that is now Addis Ababa was chosen by Empress Tatyu Betul. The city was founded in 1886 by Emperor Menelik the second. Today, Addis Ababa is often referred to as the political capital of Africa because of its rich historical, diplomatic and political significance in the continent.

PHOTO: Night view of Addis Ababa.

1. INTRODUCTION

Driven by the expansion of services and agricultural sectors and at an average growth rate of 9.9% over the recent past, Ethiopia has one of the fastest growing economies in the world. However, with a population of over 90 million people and a per capita income of USD650, the country is also one of the poorest in the world. Therefore, it faces several developmental challenges. To this end, the government has embarked on ambitious plans to address this developmental anomaly. The country is currently in the process of implementing the Growth and Transformational Plan (GTP) 2010-2015 which broadly seeks to facilitate the attainment of a middle-income country status and to realise the Millennium Development Goals (MDG) (Ethiopia Government, 2010). More specifically, the GTP is geared towards achieving the long-term development vision in which the country seeks to:

> "Become a country where democratic rule, good-governance and social justice reigns, upon the involvement and free will of its peoples; and once extricating itself from poverty and becomes a middle-income economy." p7

And the economic development vision which seeks to:

> "Build an economy which has a modern and productive agricultural sector with enhanced technology and an industrial sector that plays a leading role in the economy; to sustain economic development and secure social justice; and, increase per capita income of citizens so that it reaches at the level of those in middle-income countries." p7

In addition, the GTP is premised upon key pillars including:

1. Sustaining faster and equitable economic growth;
2. Maintaining agriculture as a major source of economic growth;
3. Creating favourable conditions for the industry to play a key role in the economy;
4. Enhancing expansion and quality of infrastructure development;
5. Enhancing expansion and quality of social development;
6. Building capacity and deepening good governance; and
7. Promoting women and youth empowerment.

The Government has also embarked on the second GTP which builds on the GTP1. Whereas, GTP1 was designed to lay a legal and institutional framework for the tourism sector, it is anticipated that GTP2 will provide the much needed impetus for the accelerated transformation of sector.

> "(...)The Ethiopian tourism policy focuses on identifying the country's historical, cultural, wildlife and natural resources to develop responsible and sustainable tourism through the participation of the private sector, local community (...) "p74

It is worth noting that this is not the first time that the role of the tourism sector in economic growth and development has been recognised in the country. Indeed, the country's first national development plan of the 1960s, owing to the prevailing potential, highlighted the sector's important role as one the avenues through which the country could grow and develop. In the endeavour to facilitate the sector's role as such, the country developed the first National Tourism Master Plan in 1966 which, among others, advocated for significant government involvement and investment and provided a framework for tourism and support infrastructure development. The Master Plan also saw that the Ethiopian Airlines could facilitate access to and from the Historic Route attractions. Owing to prioritisation of the tourism industry in the 1960s and early 1970s, the sector experienced rapid growth rates averaging 12% per annum. However, this remarkable development was greatly compromised during the 17 years of the Derg rule, a period in which, like many other productive sectors, the industry all but collapsed.

Since the 1990s, nonetheless, there has been a steady, albeit slow, recovery of the tourism industry which has been constrained by a series of challenges including the lack of appropriate tourism and support infrastructure and low capacity in terms of human resources, to name but a few. More recently, significant institutional developments have taken place in the country's tourism sector including the establishment of the Ministry of Culture and Tourism (MoCT) in 2005, the formulation of the National Tourism Development Policy (NTDP) in 2009, the formation of the Tourism Transformation Council (TTC) and the Ethiopia Tourism Organisation (ETO) in 2014. Arguably, this is a demonstration of a higher prioritisation of the tourism sector, though challenges still persist (MoCT, 2009).

The NTDP recognises the challenges facing the sector as both internal (such as limitations in basic tourism supply and lack of capacity in general) and external (such as poor national image and instability in the Horn of Africa region). To this end, the NTDP strives to provide a conducive environment for the development of the sector in a responsible and sustainable manner and in line with the country's broader development goals including poverty alleviation. In particular, the policy seeks to:

- *Ensure the country's fully benefits by sustaining competitiveness in the international tourism market, by turning Ethiopia into a preferred destination in Africa and by maximising on direct and indirect benefits.*
- *Build a tourism industry that makes important contributions in earning and conserving foreign exchange, and which integrates into economic growth and development.*
- *To create extensive employment opportunities for communities as tourist destinations and to ensure community benefits through a wider distribution of income, and to enhance community participation in decision-making on development.*
- *To realise a tourism industry that builds a positive image of the country, carries on the sector's development in a responsible and sustainable manner, with the capability of growing without disrupting peoples' culture and lifestyles and the natural environment.*
- *To build an industry that can lengthen the tourists' stay by solving observed limitations in service in the sector and to provide for progressive growth of capacity in tourist facilities deployed in the field.*



The lower Omo Valley has been declared a World Heritage Site by the United Nations Educational Scientific and Cultural Organisation (UNESCO).

PHOTO: A boy of the Arbore tribe with traditional body painting in Lower Omo Valley.

Further, recent developments within the East African region, and in particular, within the Inter-Governmental Authority on Development (IGAD) region, have underscored the strategic significance of the tourism sector to drive the social-economic development of the regional economies. In view of this recognition, the region has developed a ten year Sustainable Tourism Master Plan for the period 2013-2023. In addition to the inter-governmental initiatives, the IGAD Master Plan strongly recommends the development of Sustainable Tourism Master Plans to guide the development of the sector within each of the member countries.

Within the Ethiopian context, despite the immense opportunities that exist in the country in terms of both cultural and natural resources for tourism development, the country continues to lag behind other economies in the region in terms of tourism growth and development. This could be attributed to several challenges the country's tourism industry faces including, the narrow range of extant tourism products, lack of effective marketing strategies, human resource capacity dearth, lack of research to inform tourism growth and development, weak institutional and legislative frameworks, industry quality and standards issues, insufficient tourism and support infrastructure, and, uncoordinated and fragmented tourism planning and development both at the national and regional levels.

This Sustainable Tourism Master Plan (STMP) (2015-2025) therefore, in line with the NTDP, the GTP, and the recommendations of the IGAD regional STMP, is geared towards addressing the foregoing challenges with a view to facilitating the achievement of the country's tourism industry development goals. In addition, it is anticipated that if effectively implemented, the tourism industry could make significant contribution towards the realisation of the country's long-term broad development vision of attaining, among others, the middle-income country status within a decade.

The STMP sets out a vision for sustainable tourism development and includes strategic programmes and actions in a 10 year implementation framework. Preparation of the STMP was undertaken between November 2013 and November 2014, with technical and financial assistance from the UNECA Sub-Regional Office for Eastern Africa and involved situational analysis, extensive stakeholder consultations, and a review of internationally accepted best practice for tourism planning and development.

The STMP begins with an overview of global tourism trends and that of Ethiopia's tourism industry. This is followed by a detailed situational analysis of the country's tourism industry and ends with an overview of her relative competitiveness against selected regional destinations. Based on the situational analysis, the STMP sets the Vision, Mission and Ambition for the country's tourism industry and highlights the Shared Values to be pursued in the development of the sector. It also provides short term, intermediate and long-term forecasts for international visitor arrivals, tourism receipts and employment.

Related Strategic programmes and actions needed to achieve the vision of the Master Plan are presented in Section III. Section IV describes implementation and monitoring arrangements, including the roles and responsibilities of various public and private stakeholders. The implementation framework, divided into three time horizons: short term (1-3 years), medium term (4-6 years), and long term (7-10 years), complete with expected outputs and milestones in terms of Objectively Verifiable Indicators (OVIs), indicative costs, and the underlying assumptions, are provided.



A 17km line running from the city centre to industrial areas in the south of the city opened on 20 September 2015. At the time of going to press, the east-west line remains under construction.

PHOTO: Addis Ababa light rail system.

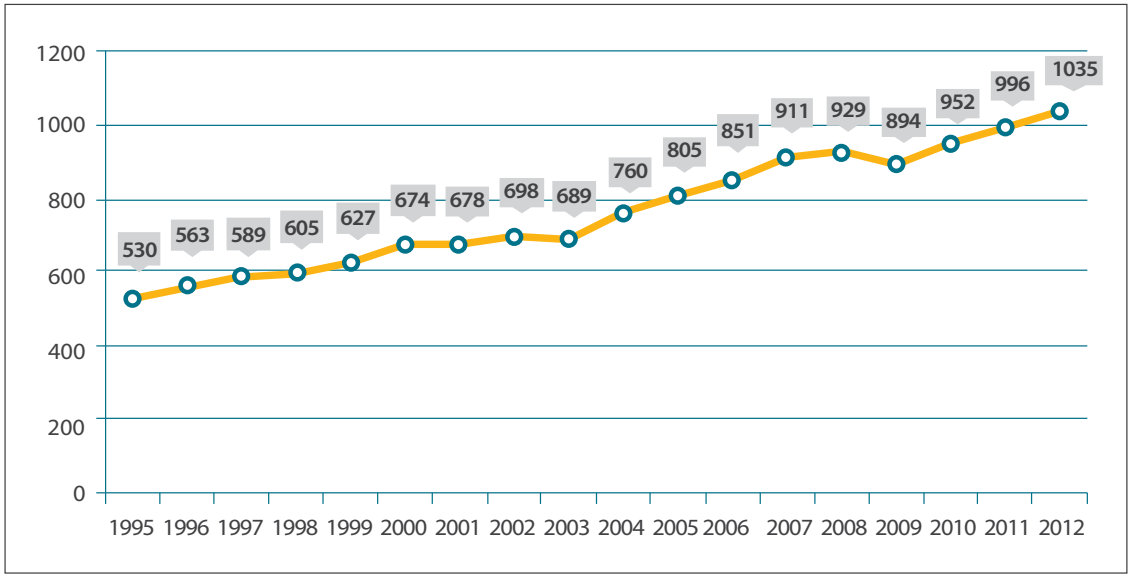

BOLE
COMMERCIAL

2 SITUATIONAL ANALYSIS

2.1 Global Tourism Outlook

Despite occasional shocks, international tourism has continued to experience expansion and diversification that has seen the industry becoming one of the largest and fastest-growing economic sectors in the world. According to the UNWTO, international tourist arrivals have been rising steadily from 25 million in 1950 to 278 million in 1980, 528 million in 1995 and 1,087 million in 2013. Further, as per UNWTO's long term forecast *Tourism Towards* 2030, this figure is expected to increase by 3.3% a year from 2010 to 2030 to reach 1.8 billion by 2030. Figure 2.1 provides a snapshot of international arrivals growth trajectory between 1995 and 2012.

Figure 2.1: World: International Visitors Arrival between 1995-2012 (million)



Source: UNWTO Highlights May, 2014

This growth, however, exhibits regional differences. For instance, as depicted in Table 2.1 below, while Europe continues to account for more than half of the international tourist arrivals, Asia and the Pacific region and Africa recorded the highest annual average growth between 1990 and 2013 (6.2 % and 6.1% respectively) with Sub-Saharan Africa recording the third highest average annual growth (7.1%). The UNWTO projections indicates that in 2014, Asia and the Pacific region will record the highest growth rate (between +5% to +6%) followed by Africa (+4 to +6%). Europe and the Americas are projected to grow by between +3% to +4%. In the Middle East, growth is expected to range between 0% to +5%.

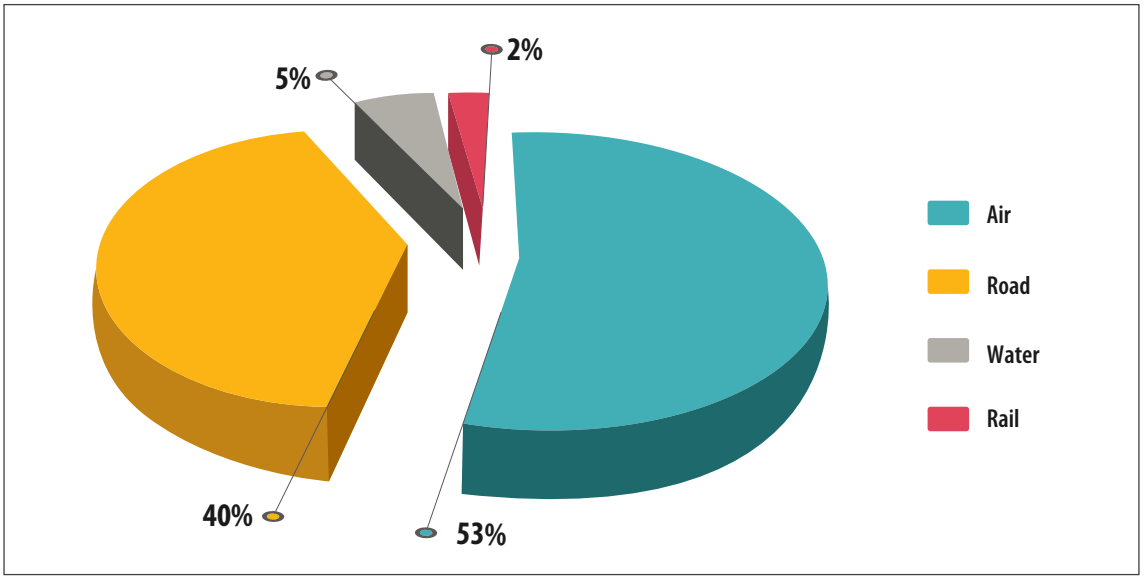
Table 2.1: World: International Visitors Arrival by UNWTO Regions between 1995-2012

	International Tourist Arrivals (million)							Market share (%)	Average annual growth (%) '05-' 13*
	1990	1995	2000	2005	2010	2012	2013*	2013*	
World	**434**	**528**	**677**	**807**	**948**	**1,035**	**1,087**	**100**	**3.8**
By UNWTO regions:									
Europe	**261.1**	**304.0**	**388.2**	**448.9**	**484.8**	**534.4**	**563.4**	**51.8**	**2.9**
Northern Europe	28.2	35.8	46.6	60.4	62.7	65.1	68.9	6.3	1.6
Western Europe	108.6	112.2	139.7	141.7	154.4	167.2	174.3	16.0	2.6
Central/Eastern Europe	33.9	58.1	69.3	90.4	94.5	111.7	118.9	10.9	3.5
Southern/Mediter. EU.	90.3	98.0	132.6	156.4	173.3	190.4	201.4	18.5	3.2
-of which EU-28	229.7	267.3	332.3	363.8	380.0	412.2	432.7	39.8	2.2
Asia and the Pacific	**55.8**	**82.0**	**110.1**	**153.5**	**204.9**	**233.5**	**248.1**	**22.8**	**6.2**
North-East Asia	6.4	41.3	58.3	85.9	111.5	122.8	127.0	11.7	5.0
South-East Asia	21.2	28.4	36.1	48.5	70.0	84.2	93.1	8.6	8.5
Oceania	5.2	9.6	10.9	11.4	11.9	8.1	12.5	1.1	1.7
South Asia	3.1	4.2	6.1	8.1	12.0	14.6	15.5	1.4	8.4
Americas	**92.8**	**109.1**	**128.2**	**133.3**	**150.6**	**162.7**	**167.9**	**15.5**	**2.9**
North America	71.8	80.7	91.5	89.9	99.5	106.4	110.1	10.1	2.6
Caribbean	11.4	14.0	17.1	18.8	19.5	20.7	21.2	2.0	1.5
Central America	1.9	2.6	4.3	6.3	7.9	8.9	9.2	0.8	4.9
South America	7.7	11.7	15.3	18.3	23.6	26.7	27.4	2.5	5.2
Africa	14.7	18.7	26.2	34.8	49.9	52.9	55.8	5.1	6.1
North Africa	8.4	7.3	10.2	13.9	18.8	18.5	19.6	1.8	4.4
Sub-Saharan Africa	6.3	11.5	16.0	20.9	31.2	34.5	36.2	3.3	7.1
Middle East	**9.6**	**13.7**	**24.1**	**36.3**	**58.2**	**51.7**	**51.6**	**4.7**	**4.5**

Source: UNWTO highlights May, 2014

According to the UNWTO, air travel continues to be the dominant mode of travel in international tourism. In 2013, slightly over half of all travellers arrived at their destination by air (53%), while surface transport accounted for 47% with 40% being by road, 2% by rail, and 5% by water (Figure 2.2).

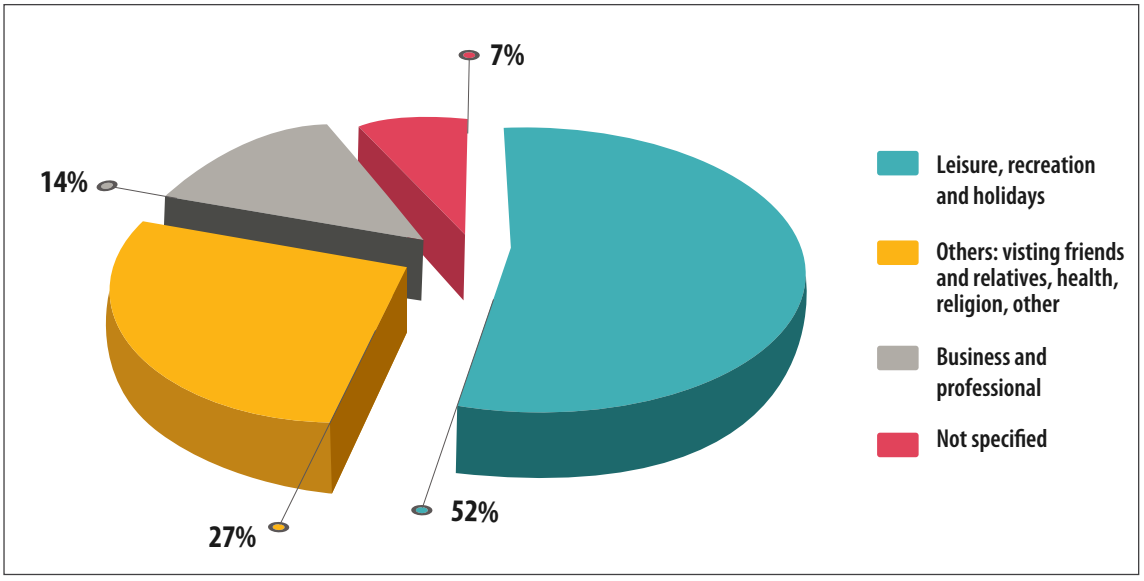
Figure 2.2: Modes of Travel for International Arrivals, 2013 (%)



Source: UNWTO highlights, May 2014

Travel for holidays, recreation and other forms of leisure continues to be the main purpose for international travel accounting for just over half of all international tourist arrivals (52% or 568 million) in 2013. Travel for business and professional purposes accounted for 14% of international tourists. Travel for other reasons such as visiting friends and relatives (VFR), religious reasons and pilgrimages, health treatment and so on accounted for 27% (Figure. 2.3).

Figure 2.3: Inbound Tourism by Purpose of Visit 2013



Source: UNWTO highlights, May 2014

2.1.1. World Tourism Receipts

According to the UNWTO Highlights 2014, international tourism receipts grew by 5% in real terms to reach US$ 1159 billion in 2013, at par with the growth in international arrivals (also at +5%) reversing the earlier years trend where the growth in international tourism receipts lagged behind that of arrivals. Europe, which accounted for 42% of all international tourism receipts, saw the largest growth in 2013, increasing by US$ 35 billion to US$ 489 billion. The Asia and the Pacific region, that accounted for 31% of worldwide receipts, had her receipts increasing by US$ 30 billion to US$ 359 billion in the same period. In the Americas, accounting for 20% share, receipts increased by US$ 16 billion to US$ 229 billion. In the Middle East, international tourism receipts were estimated at US$ 47 billion, accounting for 4% of international tourist receipts. Africa recorded US$ 34 billion, accounting for 3% of the international tourist receipts. In terms of the relative growth, Asia and the Pacific recorded the largest increase in receipts (+8%), followed by the Americas (+6%) and Europe (+4%). Africa posted flat results while receipts in the Middle East were down 2% compared to 2012 (See Table 2.2).

Table 2.2: World: International Tourist Receipts

	International Tourism Receipts Local currencies, constant prices (% change)				Market share (%)	Receipts (US$)		
						(billion)		per arrival
	10/09	11/10	12/11	13*/12	2013*	2012	2013*	2013*
World	**5.2**	**4.5**	**4.2**	**5.3**	**100**	**1,078**	**1,159**	**1,070**
By UNWTO regions:								
Europe	**-0.2**	**4.9**	**1.9**	**3.8**	**42.2**	**454.0**	**489.3**	**870**
Northern Europe	3.4	2.4	3.3	7.1	6.4	67.6	74.2	1,080
Western Europe	1.4	3.9	2.7	1.7	14.5	157.9	167.9	960
Central/Eastern Europe	3.5	6.8	4.0	3.4	5.2	56.3	59.9	500
Southern/Mediter. Eu.	-1.9	6.1	0.0	4.5	16.2	172.2	187.3	930
- of which EU-28	0.9	4.0	1.7	3.4	34.8	374.2	402.9	930
Asia and the Pacific	**14.9**	**8.3**	**6.7**	**8.2**	**31.0**	**329.1**	**358.9**	**1,450**
North-East Asia	21.4	9.2	7.9	9.3	15.9	167.2	184.7	1,450
South-East Asia	15.0	12.9	10.6	9.7	9.3	96.0	107.4	1,150
Oceania	-3.0	-4.1	-1.3	1.9	3.7	43.0	42.6	3,410
South Asia	10.7	11.6	-0.6	5.3	2.1	22.9	24.3	1,570
Americas	**4.2**	**5.1**	**5.7**	**6.4**	**19.8**	**212.9**	**229.2**	**1,360**
North America	0.7	-1.5	1.2	2.1	2.1	24.2	24.8	1,170
Caribbean	0.7	-1.5	1.2	2.1	2.1	24.2	24.8	1,170
Central America	0.3	9.7	7.5	3.2	0.8	8.7	9.4	1,020
South America	2.2	5.7	3.2	3.2	2.1	23.6	23.9	870
Africa	**2.6**	**1.7**	**7.3**	**0.0**	**3.0**	**34.3**	**34.2**	**610**
North Africa	0.2	-5.5	9.1	-1.4	0.9	10.0	10.2	520
Sub-Saharan Africa	3.8	5.0	6.5	0.6	2.1	24.3	24.0	660
Middle East	**6.3**	**-17.2**	**2.2**	**-1.9**	**4.1**	**47.5**	**47.3**	**920**

Source: UNWTO highlights, 2014

2.2 The Tourism Industry in Ethiopia

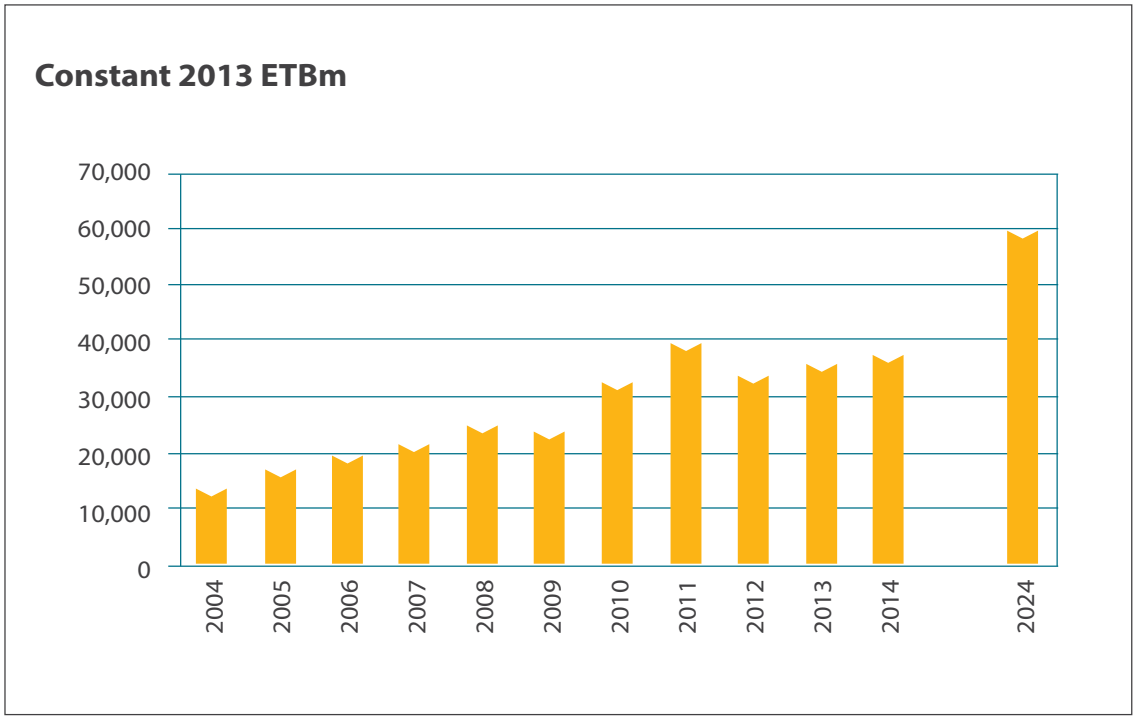
The role of the tourism industry in Ethiopia's socio-economic development has always been recognised in the country. Noticeably, the number of international tourist arrivals has grown in leaps and bounds since the national development plan in 1965 in which the importance of the tourism industry in economic growth and development was highlighted leading to an average of 63,833 arrivals by the early 70s. The ensuing period thereafter, however, could be described as the *dark era* for the tourism industry as captured in this excerpt drawn from the national tourism policy:

> "During the 17 years that the Derg was in power, tourism declined drastically because of the adverse conditions created by the war, recurrent drought, strained political and diplomatic relations". (MoCT, 2009:43)

All these factors contributed to negative image of the country as a tourist destination. Nonetheless, though the image of instability has been somewhat shed, that of a drought stricken destination, given the publicity created by the Live Aid concert organised by Bob Geldof in 1985, which is one of the most viewed events globally to date, unfortunately continues to persist. Despite these challenges, the country's tourism sector has experienced growth over the years seeing it increasingly become an important economic sector in the country.

Such economic prominence of the industry is illustrated by its direct contribution to the country's GDP which in 2013 was 4.2%, translating to ETB 35,766.6m. This is forecast to rise by 4.5% to ETB 37,373.6m in 2014 (WTTC, 2014). This primarily reflects the economic activity generated by industries such as hotels, travel agents, airlines and other passenger transportation services (excluding commuter services). But it also includes, for example, the activities of the restaurant and leisure industries directly supported by tourists. The direct contribution of travel and tourism (T&T) to GDP is expected to grow by 4.8% pa to ETB 59, 495.2mn (3.6% of GDP) by 2024 (WTTC, 2014) (See Figure 2.4).

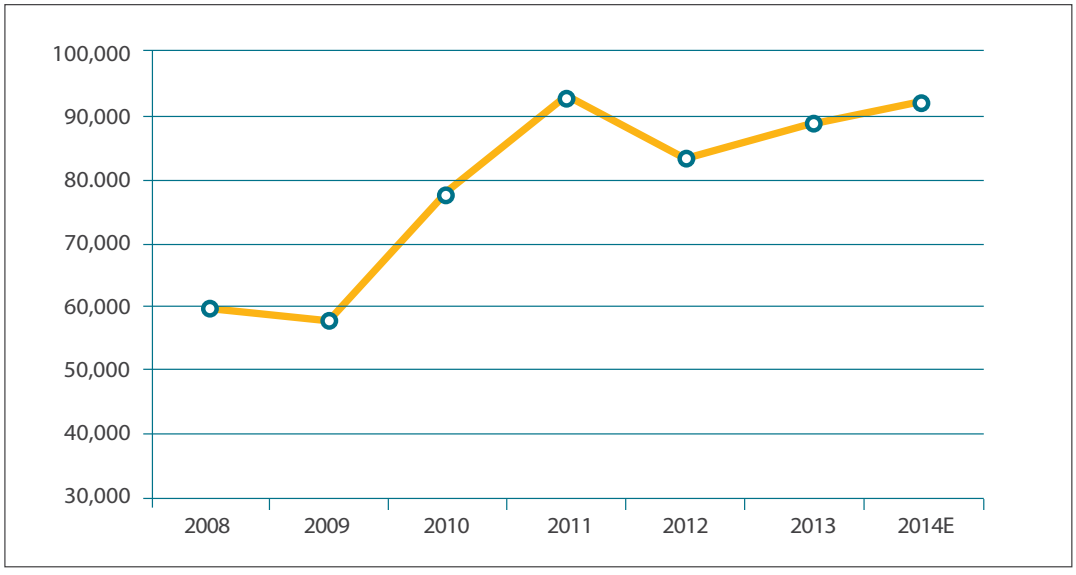
Figure 2.4: Direct Contribution of T&T to GDP (ETB, m)



Source: WTTC, 2014

The total contribution of Travel & Tourism to GDP (including wider effects from investment, the supply chain and induced income impacts, was ETB88, 691.2m in 2013 (10.3% of GDP) and is expected to grow by 4.3% to ETB 92, 547.3m (10.1% of GDP) in 2014. The total GDP contribution is forecasted to rise by 4.9% pa to ETB149, 832m by 2024 (9.0% of GDP) (Figure 2.5).

Figure 2.5: Total Contribution of T&T to GDP (ETB, million)



Source: WTTC, 2014

Further, a fundamental contribution of the tourism industry to economic growth and development is its ability to generate both direct and indirect employment owing to the multiplier effect. As such, the industry is now an important source of employment accounting for 3.8% of total employment in 2013 representing 985,500 jobs directly. This is forecast to grow by 0.1% in 2014 to 986,000 (3.6% of total employment). WTTC projects that the sector will account for 1,049,000 job directly, an increase of 0.6% per annum over the next ten years (WTTC, 2014). Consequently, the sector has been identified as an avenue through which accelerated and sustainable development to end poverty can be achieved as highlighted in the country's GTP 2010-2015.

22 out of **140**
Ethiopia's global price competitive ranking by the TTCI.

2.3 Competitive Analysis of Ethiopia's Travel and Tourism Industry

Ethiopia's global and regional ranking has been consistently improving over the years rising from position 123 in 2009, to 122 in 2011 and 120 in 2013. This, though still below other countries in the Sub-Saharan region offering similar tourism products, is a remarkable achievement compared to South Africa, Kenya, Rwanda and Tanzania, each of which has not been consistent in competitiveness over the period under consideration. Table 2.3 below analyses the country's competitiveness as it compares to selected countries within the South Sahara Africa.

Overall, out of the 140 economies ranked by the TTCI in 2013, the country performs relatively well in a number of areas including in the travel and tourism sector price competitiveness (position 22). This is attributable to the country ranking as second globally in *purchasing power parity* (a measure of the extent to which goods and services in the country are more or less expensive than elsewhere) and relatively low fuel prices (position 29). The country's second best performance is in her natural resources

(position 33 globally) marked by the presence of her natural World Heritage Site (rank 45), and the presence, in the country, of known threatened species (26). However, compared to other Sub-Saharan African countries within this regional set, this performance is only better than Rwanda's position 69, with Tanzania being at position 4 globally.

The other areas of a fairly favourable global ranking are the country's cultural resources (position 82) as a result of the number of cultural World Heritage Sites (rank 45) in which the country performs better than her regional neighbours; Safety and security (position 90) marked by low levels of business costs of crime and violence (position 22) which is, however, compromised by the high number of road traffic accidents (position 130); and Environmental sustainability (position 90)- marked by a substantially low level of carbon dioxide emission (position 6).

Table 2.3: Ethiopia's Global T&T Competitiveness Relative to Selected Sub-Saharan Africa Countries (out of 140 Economies)

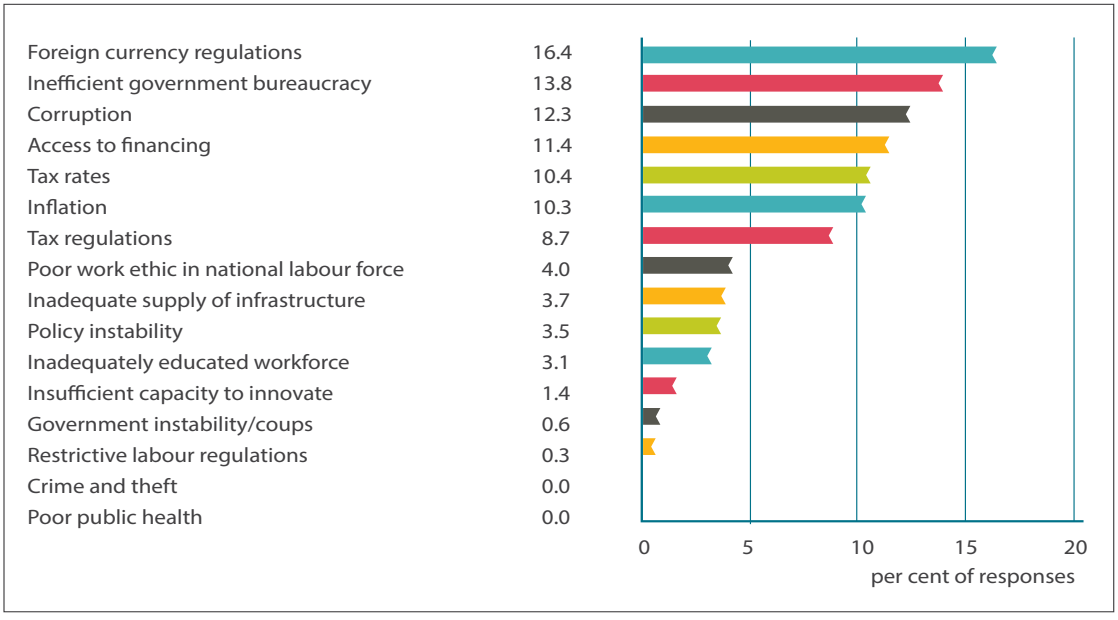
Country:	ET	KE	RW	S.A	TZ
Global Rank 2013	120	96	105	64	109
Global Rank 2011	122	103	102	66	110
Global Rank 2009	123	97	n/a	61	98
Continental Rank 2013	17	8	9	3	12

TTCI Sub index	ET	KE	RW	S.A	TZ	TTCI Sub index	ET	KE	RW	S.A	TZ	TTCI Sub index	ET	KE	RW	S.A	TZ
T&T regulatory framework sub-index	122	108	78	81	118	T&T business environment and infrastructure sub-index	127	105	117	59	125	The T&T human, cultural, and natural resources sub-index	97	60	104	57	59
1) Policy rules and regulations	132	95	6	29	74	6) Air transport infrastructure	90	77	103	43	118	11) Human resources	126	106	110	132	116
2) Environmental sustainability	90	21	12	52	45	7) Ground transport infrastructure	118	86	55	63	113	12) Affinity for travel & tourism	120	58	40	44	80
3 Safety and security	90	135	59	117	120	8) Tourism infrastructure	135	104	134	54	125	13) Natural resources	33	14	61	17	4
4) Health and hygiene	118	131	119	87	140	9) ICT infrastructure	138	106	140	81	126	14) Cultural resources	82	97	138	58	104
5) Prioritisation of travel & tourism	115	23	97	62	85	10) Price competitiveness in the T&T Industry	22	91	59	71	43						

(Key: ET=Ethiopia; KE=Kenya; RW=Rwanda; SA=South Africa; TZ=Tanzania)
Source: The Travel & Tourism Competitiveness Index (World Economic Forum, 2013)

The above performance notwithstanding, Ethiopia generally ranks poorly in two of the three sub-indexes i.e. the T&T regulatory framework sub-index (position 122) and the T&T business environment and infrastructure sub-index (position 127). For the T&T human, cultural and natural resources sub-index, the country ranks position 97, only better than Rwanda in this comparative set. The specific areas where the country experiences serious challenges as far as the travel and tourism sector is concerned are in three key areas. First, the *policy, rules and regulations* (position 132) where the sector experiences a remarkably low prevalence of foreign ownership of travel and tourism businesses (FDI) (position 132), high cost to start a business (position 137), low level of transparency of government policy making (position 125) and unfavourable visa requirements (position 118). Indeed, these are among the factors that have been noted as the most problematic for doing business in Ethiopia (see Figure 2.6 below).

Figure 2.6: The Most Problematic Factors for Doing Business in Ethiopia (2013)



Source: The Global Competitiveness Report 2013–2014 (2013 World Economic Forum)

The second area in which the country experiences serious challenges is the *Tourism Infrastructure* referring to hotels rooms and other tourism facilities such as restaurants (ranked position 135). This is as a result of the country having very few hotel rooms by international comparison (position 134) and having limited ATMs that accept international payments (position 135). *The ICT Infrastructure* is another area where Ethiopia is quite uncompetitive. It is ranked position 138 out of 140 countries. Within this indicator, the country ranked the last globally for mobile telephone subscription per capita (140), second last for the percentage of her population using the internet (139), per capita Broadband Internet subscription (136) and more significantly, the use of ICT for business to customer transactions (131), a factor of great importance to the tourism sector as a global industry.

Further, whereas it is important to note that the country is ranked better than Kenya, Rwanda and Tanzania in the area of health and hygiene (position 118) owing to an impressive per capita hospital beds (position 20), a number of factors important to the travel and tourism sector compromises Ethiopia's position in this aspect. Notably, the country ranks the second-last globally in the access to clean drinking water (position 139), the per capita physician density (137), and access to improved sanitation (128).

Moreover, Ethiopia experiences challenges in the area of human resources, with a ranking of 126 globally, but better than South Africa within the region (at position 132). Of specific concern to the tourism sector is the country's low extent of staff training (position 127), low availability of qualified labour (126) and availability of specialised research & training (position 132).

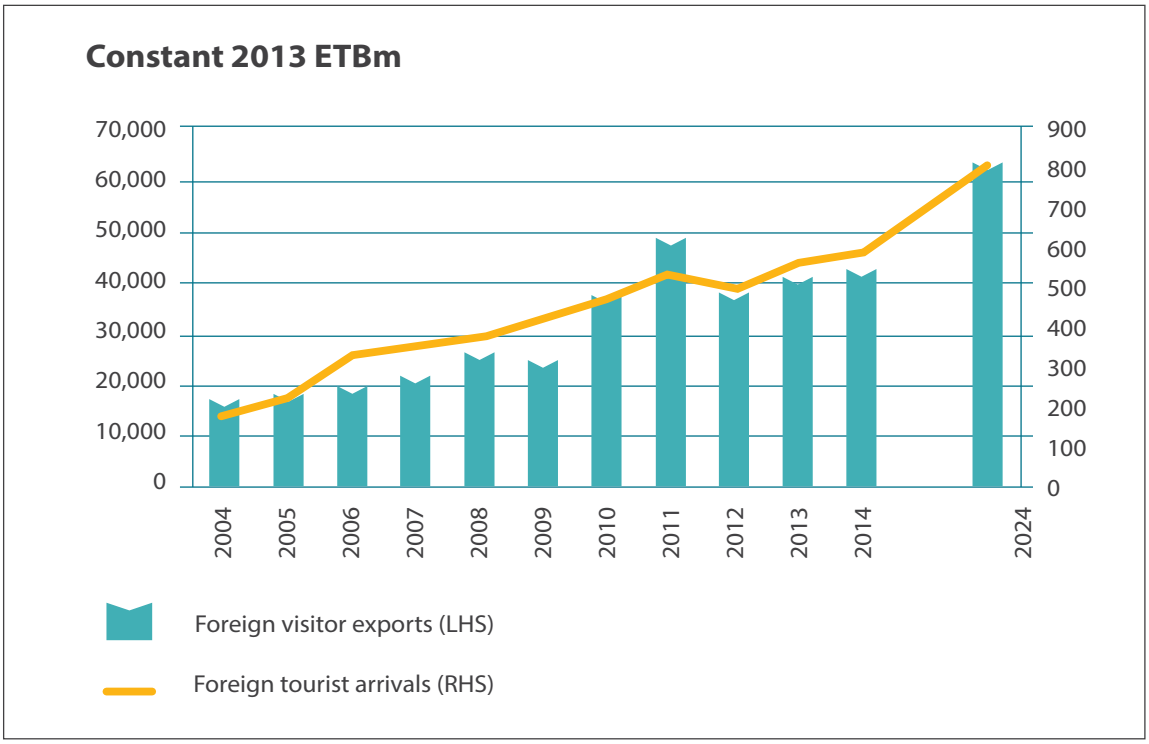
Bearing in mind the foregoing analyses, it should be appreciated that for Ethiopia to improve her global ranking in her travel and tourism industry, a deliberate and strategic commitment to improve her areas of comparative weaknesses while sustaining or bettering her areas of comparative strength would be a necessary prerequisite. This, therefore, forms the main focus of this STMP as it seeks to position the country as a competitive and sustainable global tourism destination. The following sections present detailed situational analysis under different parameters important to Ethiopia's tourism development.

2.4 Tourism Trends and Markets

International Tourist Arrivals and Receipts

The above noted contribution of the tourism sector to Ethiopia's economy is supported by a steady increase in international arrivals. In 2013, Ethiopia generated ETB 41,021.7mn in visitor exports. In 2014, this is expected to grow by 4.3%, and the country is expected to attract 588,000 international tourist arrivals. By 2024, international tourist arrivals are forecast to total 815,000, generating expenditure of ETB 63,375.8m, an increase of 4.0% p.a. Figure 2.7 below shows the growth trajectory of the international arrivals and tourist receipts between 2004 and 2013 including projections for 2014 and 2024.

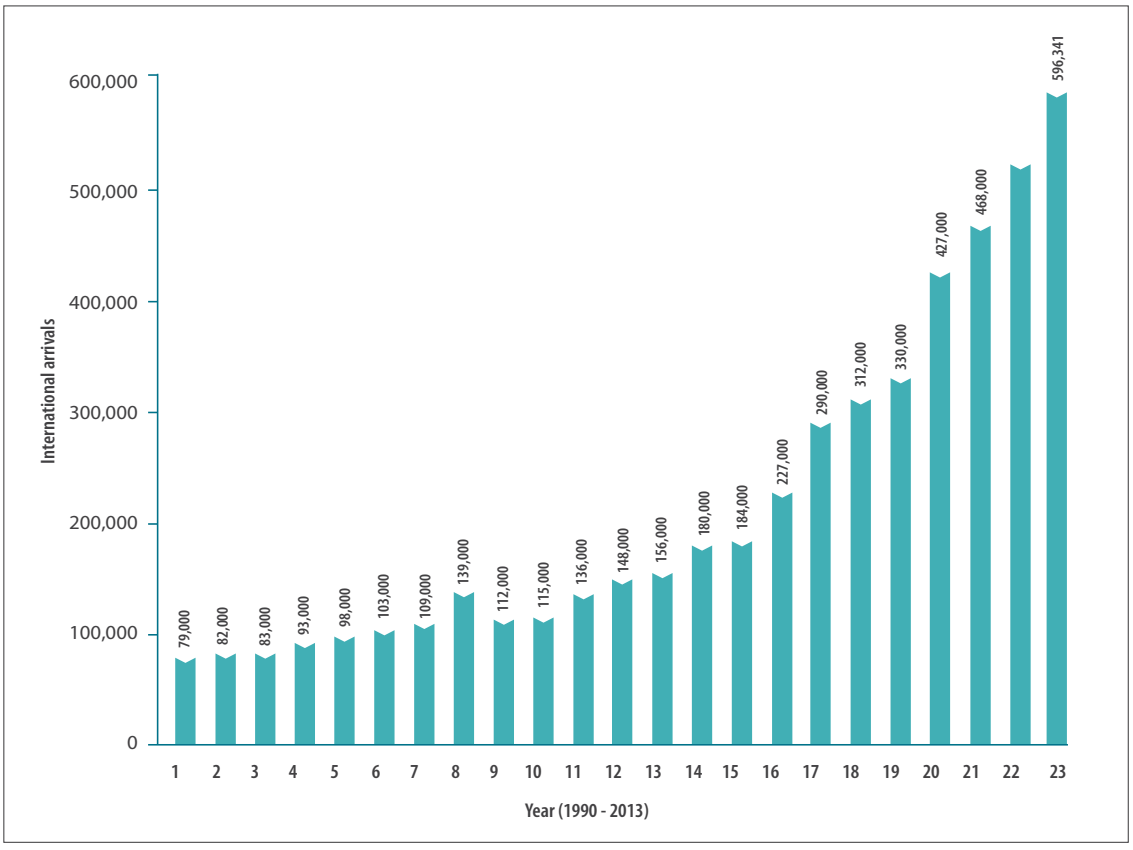
Figure 2.7: International Arrivals and Visitor Exports (USD) between 2004 and 2014



Source: WTTC, 2014

From Figure 2.7 above, it is clear that despite few incidences of decline such as in 2009 and 2012, tourist receipts generally have been increasing and are expected to continue to do so in future. It is important to note that the slump in 2009 could have been attributed to the 2008 global financial crisis that resulted in the slowing down of the global economy. In addition, the fact that during the same periods, Kenya, also experienced similar slump in tourist receipts due to mainly political and civil unrest, implies that the prevailing regional scenario also impacts tourism development in the country. This is evidence of the sensitivity of the industry to external factors

Figure 2.8 Depicts the growth in international tourist arrivals from the past two decades, between 1990 and 2013



Source: UNWTO

As seen in Figure 2.8, it is evident that for most parts, international tourist arrivals have been on a growth trajectory since the 90s given that in 1990 the number of arrivals was only 79,000. Table 2.4 tabulates the major source markets for Ethiopia.

Table 2.4: Tourist Arrivals 2008-2012

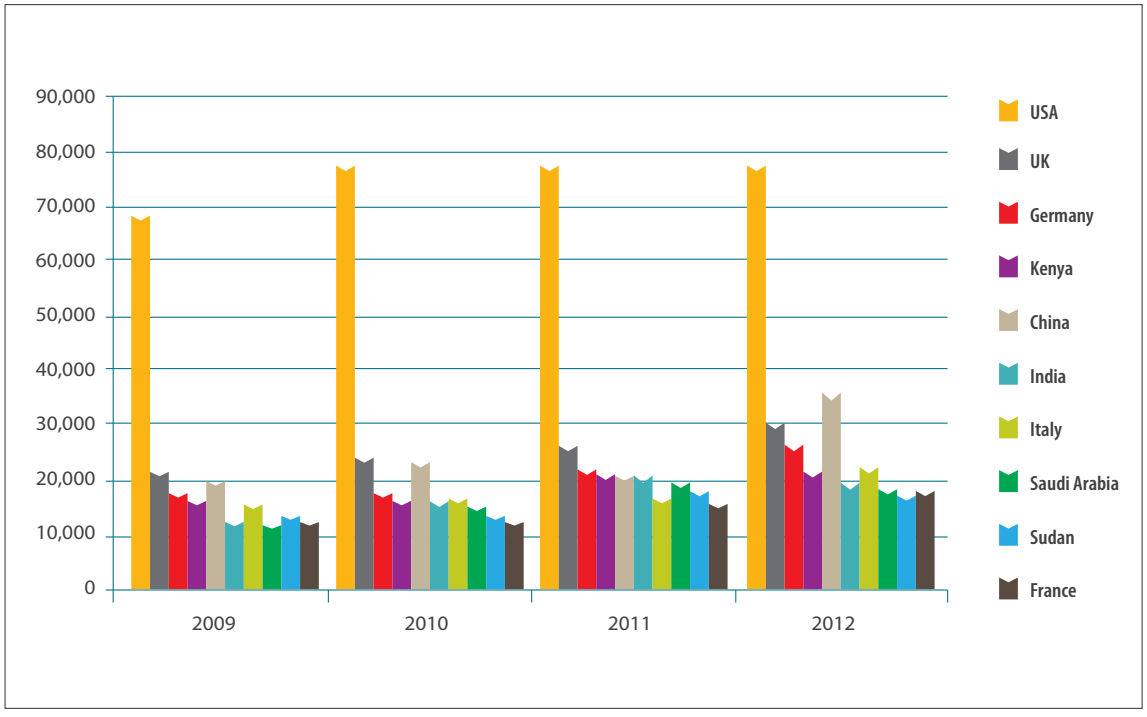
Region	International Tourist Arrivals				Percentage Change				
	Year								
	2008	2009	2010	2011	2012	09/08	10/09	11/10	12/11
Africa	115,999	150,102	140,076	160,311	180,294	29.3	-6.67	14.44	12.46
Europe	95,354	118,689	136,690	162,784	170,653	24.47	15.16	19.08	4.83
Americas	59,240	77,826	95,203	96,246	117,082	31.37	22.32	1.09	21.64
South Asia	11,195	26,448	15,366	20,746	19,182	9.74	23.87	35.01	-7.53
East Asia & The Pacific	19,477	26,448	33,393	28,884	46,515	35.79	26.25	14.81	16.04
Middle East	25,228	37,482	42,301	47,583	53,472	48.35	13.02	12.48	12.37
Ocenia	3,664	4,340	5,211	5,874	5,367	18.44	20.29	12.51	-8.63
Total	**330.157**	**427,286**	**468,305**	**523,438**	**596.341**	**29.41**	**9.59**	**11.77**	**13.92**

Source: MoCT Tourism Statistics Bulletin, 2009-2012

As can be observed in Table 2.4, the country's most important markets are Africa, Europe and the Americas. In addition, it is satisfactory to also note that all the markets have been experiencing growth over the years under review. In terms of individual source markets, the United States forms the single most important market for the country. Among the other top ten markets are China, UK, Germany, Kenya and Italy, followed by France, Sudan, India and Saudi Arabia (Figure 2.9).

Of importance to note is the fact that Africa now has over 300 million people or about 34% of Africa's population who fall within the middle class bracket according to AfDB estimates. A focus on this market that has closer cultural and spatial proximity to Ethiopia would be a strategy in the right direction. South Africa, for instance, has recognised this opportunity and has developed marketing strategies and appropriate products targeting a number of countries in Africa including Botswana, Kenya and Nigeria. For instance, in 2012, compared to the 25 million international arrivals received by Malaysia, a top ten global tourist destination, 13 million were from Singapore compared to just 402,000 from the UK, while the domestic market was estimated at over 90.5 million (as of 2009).

Figure 2.9: Top Ten markets for Ethiopia (2009-2012)



Source: MoCT Tourism Statistics Bulletin, 2009-2012

In addition, when the country's tourist markets are looked at in terms of purpose of visit (Table 2.5), interesting trends start to emerge. For example, tourists visit the country mainly to engage in business, to attend conferences, to go on vacation, on transit, or to visit their friends and relatives. Tourists on vacation and in transit have continued to account for over half of all international tourist arrivals. The high number of transit tourists could be attributed to Bole International Airport being a regional hub and the role played by Ethiopian Airlines as a key carrier in Africa, while the bulk of tourists on vacation tend to be mainly from long-haul destinations such as Europe and America.

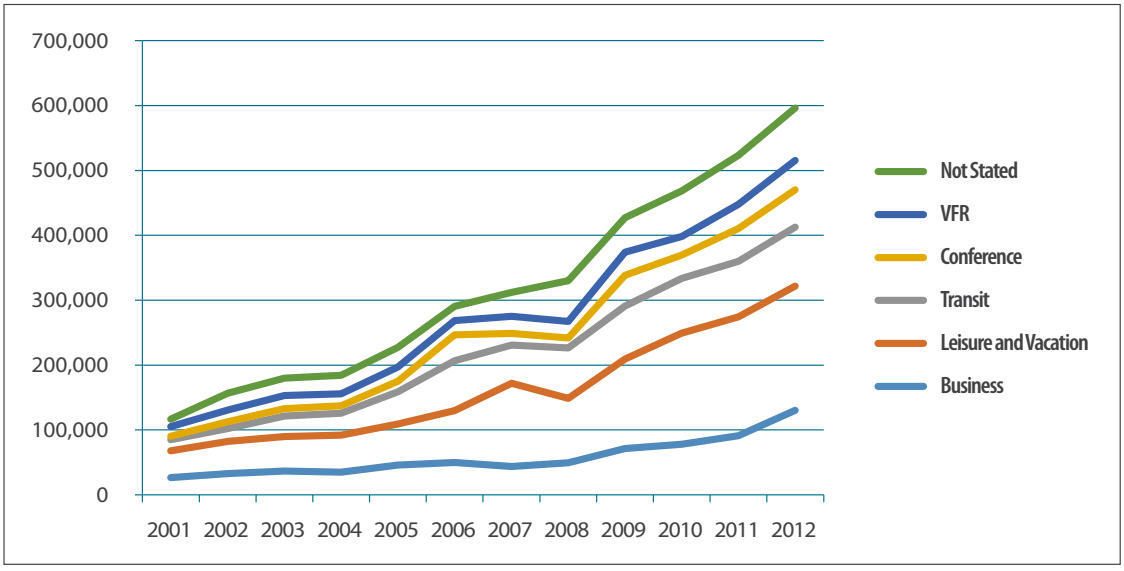
Table 2.5: Ethiopia: International Arrivals by Purpose of Visit- 2001 to 2012

Year	Business	Leisure and Vacation	Transit	Conference	VFR	Not Stated	Total
2001	26,577	41,083	17,216	5,361	14,913	11,288	116,438
2002	32,752	49,339	20,113	10,612	17,779	25,732	156,327
2003	36,571	53,315	31,414	11,705	19,895	27,010	179,910
2004	35,014	56,790	34,129	11,379	18,209	28,558	184,079
2005	46,008	63,246	49,558	16,385	21,732	30,469	227,398
2006	49,724	80,184	76,556	40,000	22,180	21,814	290,458
2007	43,455	128,533	58,916	17,882	26,337	36,820	311,943
2008	49,209	99,394	77,572	15,721	25,482	62,779	330,157
2009	71,374	138,070	81,481	47,516	35,593	53,253	427,287
2010	77,816	171,414	84,229	36,145	28,672	70,029	468,305
2011	91,064	183,008	86,020	50,531	37,116	75,699	523,438
2012	130,321	191,537	90,990	57,475	45,174	80,844	596,341

Source: MoCT, 2010, 2014

It is satisfactory to note that all the market segments by purpose of visit have been on a positive growth trajectory. However, of great concern is the increasingly growing number of visitors who fail to state the reason for their visit, rising to almost eight times between 2001 and 2012 (Figure 2.10)

Figure 2.10: Ethiopia: Growth Trajectory for Visitors by Purpose of Travel (2001-2012)

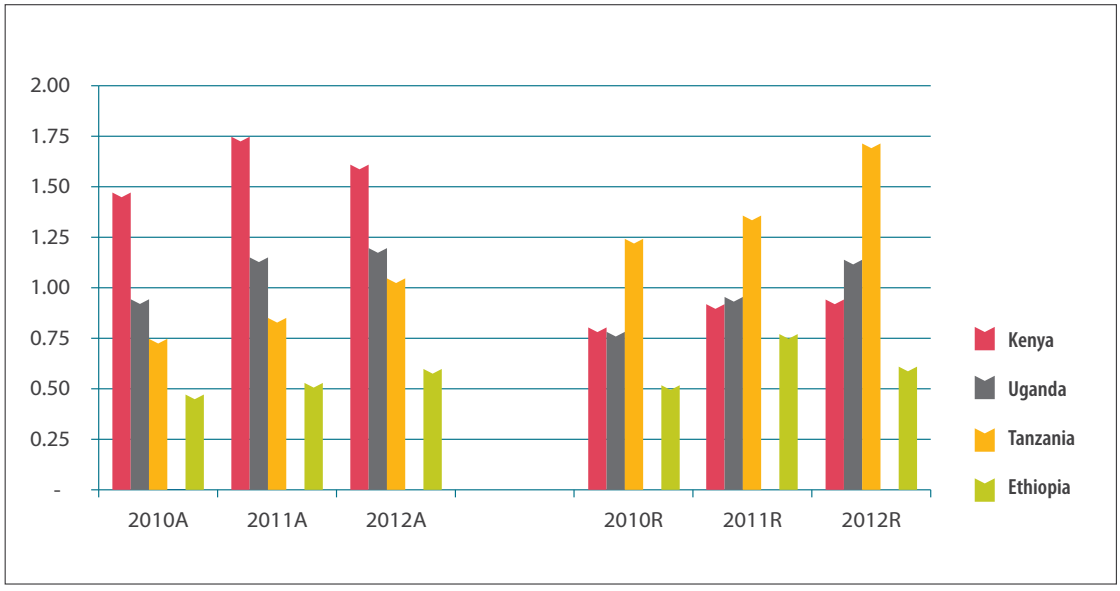


Source: MoCT (2010, 2014)

In line with categorising international arrivals in terms of purpose of visit, not much has been done in terms of profiling them; say, in terms of income, age, social class, level of education and marital status, which could be essential in designing appropriate marketing strategies and product development.

Importantly, it is worth noting that despite the impressive growth in arrivals, and as has been observed, the huge tourism potential that exists in the country, the size of the industry when compared to other regional African economies, is relatively small. Figure 2.11 below depicts the size of the country's tourism industry in terms of international tourist arrivals and receipts in relation to select African countries.

Figure 2.11: Ethiopia's International Tourist Arrivals (A) (in '000) and Receipts (R) (US$ Millions) Relative to Selected Sub-Saharan Africa Economies 2010-2012



Source: UNWTO, 2014

Of interest to note is that while Ethiopia receives comparatively low international arrivals, contributing on average about 1% of the continental arrivals (Table 2.6), the country is among those with the highest Average Visitor Spend (ASP) in the continent, averaging at US$ 1,191 compared to Tanzania's US$ 1,637 (the highest in the continent), Kenya's US$ 550, and against the continental average of US$ 638.

This thus implies that the country attracts high spending international visitors as compared to most of the regional destinations, indicating high prospects if such market continues to be attracted to the country.

Table 2.6: Ethiopia's Tourism Comparative Performance (2010-2012)

Destination	International Tourist Arrivals ('000)			International Tourist Receipts (US$ Million)			Average Visitor Spend (USD 1000)				% of Continental Arrivals		
	2010	2011	2012	2010	2011	2012	2010	2011	2012	Average	2010	2011	2012
Africa	49,938	49,646	52,948	30,389	32,680	34,325	609	658	648	638			
Sub-Saharan Africa	32,588	34,484	36,217	20,728	23,090	24,307	636	670	671	659	65.26	69.46	68.40
South Africa	8,074	8,339	9,188	9,070	9,547	9,994	1,123	1,145	1,088	1,119	16.17	16.80	17.35
Kenya	1,470	1,750	1,619	800	926	935	544	529	578	550	2.94	3.52	3.06
Uganda	946	1,151	1,197	784	960	1,135	829	834	948	870	1.89	2.32	2.26
Tanzania	754	843	1,043	1,255	1,353	1,713	1,665	1,605	1,642	1,637	1.51	1.70	1.97
Ethiopia	468	535	596	522	770	607	1,115	1,439	1,019	1,191	0.94	1.08	1.13

Source: UNWTO Highlights May, 2014

2.5 The Current Tourism Supply in Ethiopia

2.5.1 Tourism Resources and Products

It is widely acknowledged that Ethiopia possesses remarkable tourism potential in its unique and largely unexplored cultural, historical, archaeological and natural resources. Those resources are key to attract visitors and are the basis on which to build a strong tourism industry. With its 3,000 years of history and more than 80 ethnic communities each with their own distinct languages, cultures and traditions, Ethiopia stands out as a unique country in Africa. The following is an outline of the country's tourism resources and products.

World Heritage Sites

UNESCO has recognised the uniqueness of Ethiopian heritage and the country is home to nine World Heritage Sites, i.e. eight cultural and one natural site. This is the highest number in Africa, only compared to Morocco. In 2013, the *Meskel Festival* was inscribed on UNESCO's *Representative List of the Intangible Cultural Heritage* of Humanity. In addition, the country to date has five properties in the UNESCO's Tentative List.

Table 2.7: Ethiopia UNESCO World Heritage Sites

	Name	Location	Year
1	Konso Cultural Landscape	Southern Nations, Nationalities, and Peoples' Region	2011
2	Harar Jugol, the Fortified Historic Town	Harari Region	2006
3	Aksum	Tigray Region	1980
4	Lower Valley of the Awash	Afar Region	1980
5	Lower Valley of the Omo	Southern Nations, Nationalities, and Peoples' Region	1980
6	Tiya	Southern Nations, Nationalities, and Peoples' Region	1980
7	Fasil Ghebbi, Gondar Region	Amhara Region	1979
8	Rock-Hewn Churches, Lalibela	Amhara Region	1978
9	Simien Mountains National Park	Amhara Region	1978

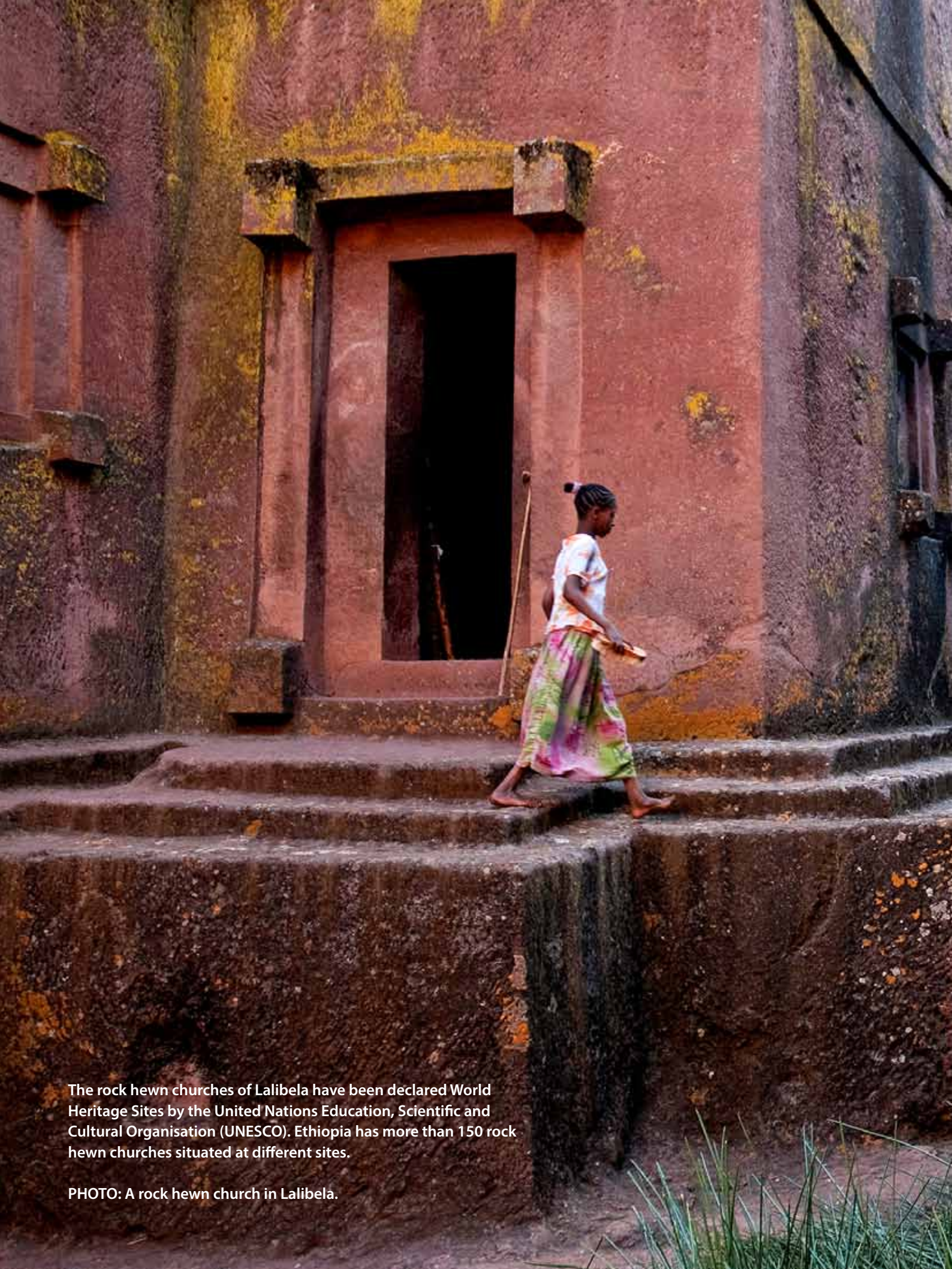
Source: UNESCO

UNESCO/ICH World Representative List

	Name	Location	Year
1	Ethiopian Meskel Festival of the finding of the True Cross	All across Ethiopia	2013

Properties in the Tentative List as of 2014

1. Bale Mountains National Park (2008)
2. Dirre Sheik Hussein Religious, Cultural and Historical Site (2011)
3. Holqa Sof Omar: Natural and Cultural Heritage (Sof Omar: Caves of Mystery) (2011)
4. Gedeo Mixed Cultural and Natural Landscape (2012)
5. Melka Kunture and Bachilt Archaeological Site (2012)



The rock hewn churches of Lalibela have been declared World Heritage Sites by the United Nations Education, Scientific and Cultural Organisation (UNESCO). Ethiopia has more than 150 rock hewn churches situated at different sites.

PHOTO: A rock hewn church in Lalibela.



Timeless Churches, Monasteries and Mosques

Ethiopia possesses numerous age-old churches, mosques and sites of traditional beliefs with abundant collections of religious bequests housed in traditional religious museums. Nowadays all those religions still coexist peacefully in the country.

- The Ark of the Covenant which is found in Aksum is one of the rare bequests of the Christian world preserved in Ethiopia. The Ark is said to have been brought to Ethiopia by Menelik I, the son of King Solomon and the Queen of Sheba, founder of the Solomonic dynasty of the Ethiopian Emperors.
- The rock-hewn churches of Lalibela and Tigray carved out of monolithic rocks during the 13th Century and still serving the living culture which are unique and mystical.
- The island churches and monasteries of Lake Tana are the medieval religious settings of glorified Abyssinian tukuls in terms of architectural features.
- All the monasteries and churches of Ethiopia attract hundreds of thousands of religious pilgrims. The most important holy sites are Gishen St. Mary, Debredamo St. Abuna Aregawi, Aksum Tsion St. Mary among others, that are located in the northern part of the country.
- The walled city of Harar is the fourth holiest city of Islam; it has over 300 mosques and170 shrines. It is very well known as a walled town with many traditional houses with distinctive interior design and decoration.
- The Negash Mosque is the earliest Muslim settlement in Africa and the burial site of followers of Prophet Mohammed who fled to Ethiopia to escape persecution in Mecca (613 AD).
- Dire Sheik Hussein shrines and Sheik Sof Omar Cave: Mosques of mystery attracts hundreds of thousands of Muslim pilgrims and both domestic and international tourists.

Ethiopia's Cultural Mosaics of Ethnographic Attractions

Ethiopia is rich with cultural mosaics of diverse ethnographic attractions attributed to its nations, nationalities, and peoples of more than 80 languages and 200 dialects. One of the most important locations for these ethnographic tourism attractions is the lower Omo Valley of Southern Ethiopia which is home to an astonishing mix of small, contrasting ethnic groups such as the Gangatom, the Karo, the Dassench, the Bodi, the Mursi, the Surma, the Arbore, and the Hamer - some of the most fascinating people and cultures. They offer the opportunity to witness authentic African traditions including colourful ornaments, elaborated hair dresses and body paintings as well as unique traditional performing arts.

Ethiopia is the land of diverse traditional performing arts including music and dancing with rich cultural musical instrument of various nations, nationalities and peoples of the country. These potentials are not properly developed or integrated in the tourism product of the country so far.

Traditional Crafts and Arts

Ethiopia is well known for its beautiful artisanal craft products of diverse features namely jewellery, coinages, other metal works; traditional leather crafts, illuminated manuscripts and book binding; traditional textile crafts and garments; basketry, bamboo works and other vegetal fibre works; woodworks, stone and horn carvings as well as pottery and ceramics.

However, while the sale of crafts in key tourism destinations is often informal, most genuine craft workshops are not easy to find or reach. Although some temporary craft markets are organised in Addis Ababa and other locations in the different destinations, there is lack of permanent spaces to properly display and sell crafts to tourists (and residents) in a pleasant environment. Lack of plans and initiatives to support small artisans, linkages with tourism companies, hotels, and tourists are the major constraints.

Colourful Traditional Festivals

Ethiopia is renowned for its traditional festivals that in most cases reproduce traditions that have been maintained for centuries. The following are the most important:

- Timket: Ethiopian Epiphany (January)
- Gena: Ethiopian Christmas in Lalibela (January)
- Meskel: the finding of the True Cross (September) listed as Intangible World Heritage by UNESCO in 2013
- Thanksgiving to the Oromo supreme God "Waqa" annually at Hora (Lake Arsedi) in Bishoftu Town during the first week of October
- Sidam Nation New Year Festival
- Ethiopian Nations, Nationalities and Peoples Day; the event to experience Ethiopia on one stage (December)
- Ashenda and Shaday in Tigray and Amhara regions, respectively
- Ashura in Harar

These festivals attract international tourists as well as a high number of domestic visitors; however, they are not well developed as tourism products especially in terms of services provision facilities and maximising for economic impacts in the respective destinations.



Ethiopia is the origin of coffee. It was first discovered in the 10th century by a nomadic tribe in Ethiopia. Drinking coffee in Ethiopia is an integral part of their culture. Moreover, Ethiopian coffee is very popular around the world.

PHOTO: A traditional cup of Ethiopian coffee.



Diversity of Amazing Landscapes

Both the highest lands of Africa and the lowest point of the continent situated under sea level are in Ethiopia, offering an awesome range of landscapes

- The *Simien Mountains*, a National Park and UNESCO site, reach over 4,000m and are considered the roof of Africa. They overlook the surrounding areas from a high plateau offering breath-taking views and are a favourite place for high altitude trekking.
- *Bale Mountains National Park*, a high altitude plateau broken by spectacular volcanic plugs, peaks and plateaus.
- *The Danakil Depression situated under sea level* is a surreal landscape rich in geothermal features. It is one of the geologically most active areas on the planet and has some of the most awe-inspiring and surreal landscapes made of salt, geysers, springs and fumaroles, and the Great Salt Lake where salt mining and trading has been going on with camel caravans.
- *Erta Ale Volcano* located in Afar region is one of the five volcanoes in the world with a lava lake at the summit.
- The *source of the Blue Nile* Tis Abay *-the smoking water-* flows from Lake Tana near Bahir Dar in Amhara region.
- Gheralta (Tigray Region), vertical pink cliffs dotted with more than 120 old rock hewn churches is an area rich in history and mysticism and a hiker's paradise.
- Sof Omar cave system (Caves of Mystery) is one of the top ten spectacular and extensive underground caverns in the world running for nearly 15 km. It is also a sacred place of worship.
- The South Central coffee corridor stretching from the Kaficho Zone of SNNPR and Jimma Zone of Oromiya. This area was formerly known as Kaffa and is credited as being the birthplace of the wild Coffee Arabica, which still grows in the forest of the highlands. The Afro-Montana forests here contain genetic diversity of invaluable worth and are one of the 34 biodiversity hotspots worldwide.
- The Ethiopian Great Rift Valley Lakes Zway, Abijjata, Shala, Langano, Hawassa, Abaya, Chamo and crater lakes of Bishoftu are rich in wildlife.

Most of these places are world-class attractions; however, in many cases there is a lack of strategy and integrated planning to develop tourism, the tourism facilities and services are very limited and services are often provided in an informal way.

In the absence of proper destination development, management plans and operational guidelines in place, the increasing number of visitors in places such as the Erta Ale and the Danakil Depression, although small, are already causing significant negative impacts (accumulation of solid waste, informal camping without minimum planning and infrastructure).

Likewise, some tourism development along the shores of hinterland lakes are taking place without a proper plan, putting at risk the attractiveness of the places and the sustainability of the tourism development. In this sense, it is worth noting that there is also no public institution at the federal level with the mandate to protect and manage outstanding landscapes and unique geological features across the country.

Wildlife and Protected Areas

Ethiopia's unique geological history and diverse topography and climate have made it known to the world as one of the few countries in Africa that harbour diverse biological resources with actual and potential ecological, economic and cultural values of both local and global importance. The country uses protected areas as part of its biological resources sustainable and wise utilisation mechanisms and the major types of these protected areas include National Parks, Wildlife Reserve, Sanctuary, Controlled Hunting Areas and Community Based Wildlife Conservation Areas. Currently, there are sixty-six documented wildlife protected areas in the country, of which twelve national parks and two wildlife sanctuaries are managed by the Ethiopian Wildlife Conservation Authority (EWCA) at the federal level and the remaining Wildlife Protected Areas are protected by the respective regional states of the country.

Ethiopia's Wildlife Protected Areas' flora and natural ecosystems harbour diverse mammalian, avian and other species which are potential for nature based tourism development. So far 287 species of mammals (31 endemic) have been recorded in the country. These are rare or endangered larger endemic mammal species/subspecies namely known as the Ethiopian wolf, walia ibex, gelada monkey, mountain nyala, Swayne's hartebeest, Menilik's bushbuck, bale monkey and Starck's hare. Other animals, which are endangered locally and globally, include Burchell's zebra, Grevy's zebra, wild ass, hippopotamus, African elephants, buffalo, oryx, different species of gazelle, giraffe, and cheetah, leopard, lion, wild dog, Nile crocodiles etc. There are 862 species of birds. Ethiopia is the second country in Africa with the highest number of endemic birds; there are 17 in total. There are 34 Important Bird Areas (IBAs) identified as conservation hotspots that harbour diverse common, endemic, threatened, endangered and globally threatened species of birds. There are also 201 species of reptiles (14 endemic); 63 species of amphibians (30 endemic) and 150 species of fish (40 endemic) in the country.

The wild animals (mammals, birds, amphibians, reptiles, fishes and insects) are mainly restricted in the wildlife protected areas of the country and deserve strong attention for conservation and tourism product development. Wildlife Protected Areas of the country have great potential for nature based tourism development. Some of them have already been included in the tour packages of many inbound tour operators. They are also visited by many incoming international tourists. These include the Simien Mountains, Awash, Bale Mountains, Nechisar and Mago National Parks and Senkelle Swayne's Hartebeest Sanctuary and Guassa and Abuna Yoseph Community Conservation Areas. There are also 21 Wildlife Controlled Hunting Areas that attract some of the world's richest sport hunters and professionals.

Although these Wildlife Protected Areas are known for their beautiful landscapes, unique ecosystems and associated precious wild animals, only 15 national parks and 1 sanctuary are legally gazetted, both at national and region level. The remaining conservation areas are still designated. Apart from lack of legal boundary, most of the protected areas (except Bale and Simien National Parks) do not have a proper management plan, which is a precondition to running effective conservation practices and sustainable tourism development. Owing to these basic conditions now, many of the national parks of Ethiopia lack proper tourism services and facilities which are important to satisfy the needs of tourists and enhance tourist experience. Furthermore, the state of many of the protected areas is under greater conservational problems including extensive incursions by livestock and people and the associated impacts like degradation and loss of natural habitats.



The Ethiopian wolf is also referred to as the simien wolf. It is listed by the International Union for Conservation of Nature (IUCN as one of the most endangered wolf species in the world.

PHOTO: A simien wolf



Services and facilities expected in the nature based tourism including proper internal roads, foot tracks, signage, resting sights, tented camps and standard camping sites with the requisite facilities are some of the important facilities needed by tourists. However, many of the Wildlife Protected Areas of the country lack these important services and facilities. As such, the great potential of the country's wildlife as an economic driver through tourism is not well tapped. The country's national parks are mainly financed by public funds and they are mostly poorly managed. As they are not operated as market oriented organisations, their commercial values have not been effectively developed and no effort has been made to establish connection between the investment made in these national parks and the revenue generated and/or the benefits derived by local peoples and the local economy.

This has resulted in an ever growing and unresolved conflict between the sustainable management of Wildlife Protected Areas on the one hand and the interests of the governing body (government) and local communities on the other. As a result, many of Ethiopia's Wildlife Protected Areas under greater conservational problems with their biological and physical resources are in rapid decline. Moreover, the law enforcement practices are not well integrated with the national defence and police. Although both these institutions are in one way or another responsible and involved in the development and the conservation of natural resources and the defence of the country's resources, so far there is no established strategy to strengthen the ongoing law enforcement effort. There is a need to establish harmony between the country's national defence and police with Ethiopian wildlife authority and the regional states.

The government is now focusing its attention to the conservation and development of the wildlife resources of the country. At the federal level, the EWCA and the respective Regional States of Culture and Tourism Bureaus (RSCTB) are devoted in maintaining and conservation of the existing Wildlife Protected Areas. They are also harmonising the prevailing resource conflict that exist between the protected areas (especially national parks) and the local communities. The initial focus of EWCA and RSCTB is to re-dermacate the existing boundaries of the national parks and conservation areas. Accordingly, local administrators and local communities are being involved in this process.

Further, the demarcation activities of Halaydge, Geralle and Bejmiz National Parks are currently under way and the re-demarcation activities of Nechisar and Omo National Parks are scheduled to begin soon. Such efforts are encouraged and require the direct involvement of political leaders especially in solving the conflicts that exist between wildlife areas, local communities as well as the matters of wildlife boundaries delineation. In doing so, especially in re-demarcation/demarcation process of conservation areas, a compromise is mandatory so that wildlife areas-dependent people should not be adversely affected.

So far, Siemen Mountain National Park and Bale Mountain National Park have management plans. Wildlife area management plans are vital in laying out the strategy for the conservation of the exceptional natural resources of each area as well as the specific actions required to achieve objectives under the strategy. In line with this, national parks that secure their own legally demarcated boundaries (gazetted) will get priority for developing their management plan. Accordingly, there is a plan in EWCA to review the management plan of Bale Mountain and develop plans for Awash, Gambella, Kafta Sheraro and Alatish National Parks. The preparation of management plans for these regionally gazetted national parks requires strong attention both from the respective regions and EWCA. This measure would be important to ensure the proper conservation practices as well as sustainable tourism development for the benefit of the local communities around the conservation areas in particular and the country as a whole.

Finally, there are two key issues pertaining to the wildlife tourism development that are worth noting. First, most populations of the medium and large sized mammals have been severely depleted and are difficult to see. This is because they suffer from habitat loss and from hunting almost everywhere in the country, even in most protected areas. This presents a challenge that must be overcome in a bid to develop the Wildlife Tourism Product. The *Wildlife Tourism Marketing Strategy* identifies this challenge and proposes strategies to overcome it. Secondly, in the endeavour to exploit such resources for tourism development, Ethiopia will have to identify both competitive and comparative advantages to take advantage of, including exploiting opportunities presented by the IGAD Sustainable Tourism Master Plan for regional tourism development and to build on lessons learnt from these countries. Other countries such as Kenya, Tanzania, Botswana and South Africa have an upper hand because their nature based tourism has been developed over several years.

2.5.2 Current Tourism Routes and Products

For many years, the routes positioned to the international tourism market by most Ethiopian tour operators are the Northern and the Southern routes with little variations;

- Northern Historic Route of monuments include Lalibela, Aksum, Gondar, Lake Tana monasteries and the source of the Blue Nile, and so on.
- Southern Route includes cultural and natural attractions of the lower Omo Valley, National Parks, Rift Valley Lakes (Langano, Hawassa and Chamo.)

Although those routes include the most outstanding attractions, the potential for differentiation and the organisation of more specialised routes and packages have not been fully exploited.

Apart from the sightseeing of the main sites, there is little diversity in the activities offered to tourists in the main tourism destinations. As trips are often sold as routes, the average stay in each destination is low, often less than two days.

There is also lack of proper understanding of the tourism markets and tour operations by local incoming operators, and the limited capacity of some regional and local authorities. In general, lack of quality tourism services and facilities and visitor management problems are observed.

Other tourism routes which are also promoted, although less often, include;

- Afar and Danakil Depression (Northeast Ethiopia), Dalloll geothermal fields, salt quarry sites, Erta Ale Volcano, Low Awash Valley, etc.
- Eastern Route: Walled City of Harar and Awash National Parks, Dire-Dawa Hurso Sercama rock paintings, Babile Elephant Sanctuary, etc.
- South-eastern Route: Sof Omer Cave and Dire Sheik Hussein Muslim Shrine, Bale Mountains National Park, etc.

- The west and southwestern Ethiopia areas are well known for their cloud forests, origin of coffee as well as the UNESCO inscribed Biosphere Reserve areas that include Kafa, Shaka and Yayu. In addition, the Gambella National Park known for seasonal migration of about a hundred thousand Nile lechwe are the most important features of the route.

In spite of the potential of these routes, they are not formally established, and they lack proper tourism services and facilities as well as tourism development plans.

2.5.3 Some Segmented Tourism Products

Addis Ababa as Centre of MICE Tourism

Situated at an altitude of 2,300 meters above sea level and with pleasant climate, the federal capital of Ethiopia is a dynamic city with vibrant cultural and entertainment options. There is also increasing number of restaurants of international standards offering a diversity of cuisines.

Addis Ababa is well endowed with the potential to tap in to the MICE tourism owing to the fact that the city is the seat of the headquarters of the African Union (AU) and the United Nations Economic Commission for Africa (UNECA). It is also the third city with the highest number of diplomatic missions in the world; world class meeting venues of the African Union Congress Centre (AU-convention facilities) and the UNECA, together with international standards hotels like Sheraton, Radisson, Hilton and many others. Bole International Airport is now becoming an increasingly important air hub in Africa. Owing to these conditions, the city has become a leading conference and event tourism destination in Africa. The New Master Plan of Addis Ababa takes into consideration the potential for tourism development.

However, the relatively low numbers of conference visitors, number of meetings hosted and the centralisation of such facilities in Addis Ababa signifies some of the challenges faced by the country in developing this potential lucrative tourism sector. The TTCI, in this regard, for instance, ranks the country at position 81 compared to South Africa and Kenya at positions 37 and 56 respectively in terms of the number of international fairs and exhibitions hosted. Table 2.8 below, further provides the International Congress and Convention Association's 2012 raking for the top ten African countries.

Table 2.8: Leading MICE Destinations in Africa, 2012

Country	Number of meetings	Africa Ranking	Global Ranking
South Africa	84	1	37
Kenya	30	2	56
Morocco	23	3	64
Egypt	22	4	65
Ghana Tanzania	15	5	71
Country	**Number of meetings**	**Africa Ranking**	**Global Ranking**
Nigeria Senegal	12	6	75
Ethiopia	10	7	81
Mauritius Tunisia Uganda	8	8	85

Source: ICCA, 2012.

From the table, it is clear that despite the comparative advantage that the country possesses (including a globally competitive national carrier and a major international airport) over countries such as Ghana, Tanzania and Nigeria, the MICE sector remains relatively underexploited. South Africa and Kenya, the top two African MICE destinations, have realised the potential of this sector and have consequently prioritised its development by putting in place appropriate strategies to support its development. Kenya, for instance, is in the process of implementing its first MICE strategy and under the tourism act, now has a dedicated MICE institution, and is currently aggressively developing the sector through a series of projects in a number of major towns, while actively marketing the country as a top MICE destination globally. Thus, for Ethiopia to successfully develop the MICE sector, appropriate strategies, both addressing the challenges and embracing opportunities to be exploited, should urgently be put in place.

Cultural Heritage Based Tourism Products

Ethiopia has a great potential to develop diversified range of cultural heritage based tourism products including historical trail, educational tour, paleo-anthropological and archaeological routes (paleo tourism), religious tourism among other events and festivals.

Trekking

The Simien Mountains, Bale Mountains, Mount Yossef, are already positioned as world class destinations for high altitude trekking. Several incoming operators are marketing trekking trips. The national parks and organised communities in those areas provide information, sell tickets and also offer support services for trekking (scouts, porters with mules to transport camping gear, cooks and guides). Suba Forest Mountain (Menagsha), Entoto and Hochocha around Addis Ababa are other trekking areas in the package of many inbound tour operators.

However, tourism facilities and services in those areas such as shelters, toilets and service areas for trekkers need upgrading and expansion, including some community lodges which offer accommodation and food services. The nearby localities of the above mentioned sites like Debark, Dodolla and Lalibela have the potential to become tourist centres and getaways for the trekking markets.

Apart from the above existing areas, Mekedella Mountains, Gunna Mountains, Grealta, Gunndagundi, Debredamo, Adwa Mountain Swamps, Chererchер Highland, Chilalo and Arsi Mountain Plate, Guge Mountain, Choke Mountains are a few, among others, with potential for trekking and hiking tourism.

Rock Climbing

In Ethiopia there are superb mountain ranges composed mainly of solid rock that offer opportunities for climbing on many untouched faces. Major places for rock climbing are *Gheralta* in Tigray and the *Bale Mountains* in the Southeast. However, climbing areas and routes are not clearly identified and graded and there is lack of trained guides and specialised companies able to design and operate specialised trips offering safety and service standards up to the needs and requirements of international tourists.

Desert Expeditions

The *Danakil Depression* and Afar region are remote areas visited by an increasing number of tourists. Apart from the unique resources that the areas offer, camel trekking, scientific expeditions, educational travel and volcano climbing are some of the opportunities for developing attractive tourism products.

Water-Based Activities

The Blue Nile, *Omo* and *Baro* Rivers are important for white water rafting with their own diverse tourism activities. These are in the packages of some inbound tour operators. However, the activity is not clearly regulated and developed, or systematically promoted.

The boat service between Bahir Dar and Gondar along Lake Tana that is currently used as a public transport by the local communities could be included to enhance and differentiate some tourism circuits; although some regulations and improvements in the vessels should be introduced for tourism use.

Thermal Tourism

Ethiopia has great potential for Wellness and Spas tourism. The "Filwahas" or the different hot springs in Addis Ababa; Sodere, Wondogent, Yrgalem, Alaba, Kemise and Fentale are very well known. All the regional states and the famous great rift valleys are endowed for their potential thermal related tourism activities. These thermal hot springs have already been used as medical treatments for not easily diagnosed diseases by local communities and domestic tourists. However, many of them need to be developed to provide specialised services and facilities to satisfy the needs and experience of domestic and international tourists. The Renaissance Dam has the prospect of becoming an important destination site for multipurpose tourism activities.

Bird Watching

Ethiopia's *avifauna* represents an interesting mixture of African, Palearctic and some strikingly unusual endemic components. The country is home to at least 596 resident species and 224 regular seasonal migrants, including 176 ones from the Palearctic. Of the world's endemic bird species, 43 species are restricted to Ethiopia and neighbouring states on the Horn of Africa; of which 18 or 19 are endemic to the country.

Top bird watching areas, for instance, *Lake Tana, the Rift Valley Lakes (Abijatta-Shalla, Chamo Hawassa, Chamo, Ababya, Chewbahir) the lower Omo Delta, Goba-Yabello and Bale,* Nechisar and Mago National Parks are some of the Important Bird Areas (IBA) in the country that are visited by many birdwatchers and are included in the packages of many inbound tour operators. Harwood's Francolin, Blue-winged goose, Spot-breasted lapwing, Yellow-fronted parrot, Ruspoli's turaco, Abyssinian catbird, White-tailed swallow, Sidamo lark, Degodi bushlark and Stresemann's bush crow are some of the unique endemic birds species found in these areas. However, there are still lack of tourism facilities and services such as trails, hides, observation platforms and visitor centres. Although some incoming tour operators are marketing bird watching activities, there is no real specialisation and there are limited specialised and knowledgeable guides able to respond to the demand of serious international birdwatchers.



Ethiopia has produced great athletes who are widely acclaimed both locally and around the world.

PHOTO: IAAF world athletics in Greece.


VTB
Dibaba
THESSALONIKI 2009
VTB
81
THESSALONIKI 2009

Running in Ethiopia

Distance running has produced many champions in Ethiopia. Abele Bikila became a legend when he won the Olympic Marathon in Rome in 1960 running on barefoot; he also won the Olympic Marathon in Tokyo in 1964, with an Olympic record. The world famous champions Haile Gebreselassie, Kenenissa Bekele, Tirunesh Dibaba and Mesert Defar have won gold medals with new records in several World Championship and Olympic races. Building on the image of the great Ethiopian athletes, the well-established *Great Ethiopian Run* held annually in Addis Ababa attracts many international and local runners. Furthermore, the potential for mountain running is being tapped with new initiatives such as the first edition of the Ethiotrail held in 2014 in the Abijata-Shala National Park. There is already an offer for training professional athletes in high altitude areas including Sululta (near Addis Ababa), and Bokoji (in Arsi), where many of the Ethiopian world class champion athletes come from.

It is, however, important to underscore that sports is becoming a leading global tourist attraction. In countries like the UK and USA, for instance, sporting events such as football, rugby, basketball, cricket, baseball and marathons, have been the key drivers for domestic, regional and international tourism. In Africa, a number of countries have also realised the potential of sports in tourism development. South Africa, for example, has an elaborate strategy on sports, given its successful hosting of the FIFA World Cup in 2010 and its subsequent positioning as an international sporting events hub. Closer home, Kenya, in its current tourism development strategy, identifies football, rugby and golf as potential key drivers for domestic, regional and international tourism development. Likewise, given the popularity of Ethiopia in terms of her athletic prowess and the growing interest in football, a deliberate scheme is needed to support relevant infrastructure development and to promote sports tourism as a diversification strategy.

1960

The year Abele Bikila won the Olympic marathon in Rome. He went on to win the 1964 Olympic marathon in Tokyo.

Community Based Tourism

Community Based Eco-tourism is relatively very young in Ethiopia and there are some developing Community Based Tourism activities in some regional states of the country. There are numerous community based eco-tourism initiatives and associations flourishing all across the country. Regions like Tigray, Amhara, Oromia, Southern Nations, Nationalities and Peoples' regional states are actively promoting this alternative development models. These CBEs are providing various tourism facilities and services for tourists interested in these types of tourism experiences. The specific location of these active CBEs include Simien and Bale Mountains national parks, Menze Guassa, Lake Tana, Lalibela Meket, Lake Ziway and Langano, Lake Hawassa, Abune Yossef , Mekedella, Adawa and Yirgalem. Although these initiatives are not well integrated in the mainstream tourism marketing, many of these CBEs can be very good models to expand CBEs to the rest of the country as the country is endowed with huge nature based tourism potential.

2.5.4 Summary of Key Issues

Just like other countries in the region that rely heavily on nature-based tourism product, Ethiopia's tourism product is dominated by the cultural, mainly, heritage-based tourism product. As such, the prevailing product base is very narrow with limited choices for visitors. This, therefore, continues to pose a challenge that exacerbates the country's efforts to increase the length of stay of visitors. Further, despite the similarity in terms of competitiveness of the prevailing heritage-based tourism product with, for example, Egypt, the country still trails in terms of visitor numbers. This could be attributed to a range of factors including the packaging and marketing of the product. In addition, owing to the narrow product-base, tourism is spatially concentrated mainly in traditional religious routes of the northern parts of the country. This has meant that other parts of the country with potential for development of non-heritage-based tourism products remain relatively underdeveloped and un-exploited.

As identified from the country-wide stakeholders' surveys, there is a general consensus that the development of tourism products in the country faces a number of challenges as listed below:

- Most of the products were noted as being under developed in quality and quantity
- Lack of new product development initiatives
- Lack of coordination among stakeholders focusing on product development
- Lack of capacity and know-how about how to develop tourism product
- Lack of destination development plan and packaging systems
- Lack of national conservation strategies and site based management plans and organisation for both cultural and natural resources
- Lack of legal protection and proper site designation

As noted, immense opportunities exist in the country given its vast land area and abundant cultural and natural resources that could be exploited to broaden the tourism product-base so as to deepen existing markets and tap into new and emerging ones. Nonetheless, to achieve such diversification of the tourism product base, a paradigm shift from the traditional tourism development approach to one that is market based, and guided by innovation and creativity in the development of not only leisure products, but also the niche tourism products such as culture-based tourism, sports, business, conference and health, geared towards the domestic, regional and international tourist markets, is urgently needed.

2.6 Tourism Marketing and Promotion

Strongly linked to product development, tourism marketing is an integral component of destination growth and development. While product development is associated with the creation of attractions or experiences, marketing plays a key role in communicating the value and appeal of the products to would be consumers. Owing to the complex and multifaceted nature of destinations arising from the inter-relationships of key stakeholders, marketing can also be an essential tool for enhancing destination competitiveness. In this regard, the main objective from the demand-side is to increase visitor numbers, while from the supply-side, marketing can be instrumental in attracting investors to invest in a range of destination goods and services including accommodation, entertainment, retail and infrastructure, thereby further boosting tourism growth and development.

It is important to note that though the visitor numbers are steadily growing, these are, nonetheless, relatively low compared to other regional destinations and given the country's recognised potential. Findings from the industry's stakeholders indicated a number of key weaknesses facing marketing of the country as a tourist destination.



There is a lot of effort both by the goverment and private sector stakeholders working on marketing the Ethiopian tourism industry.

PHOTO: The poolside of a hotel in Addis Ababa

- The current efforts are being done in an uncoordinated and fragmented manner with a clear absence of strong coordination among private-public partnerships and among private sector players themselves
- There is a lack of focus on market niches demonstrated by poor linkage of market and products
- There is lack of national tourism marketing strategy to guide the country's tourism marketing and promotional activities
- Very low focus on regional market in Africa compared to domestic and international markets
- Poor national destinations marketing through online channels
- No marketing representations in key tourist generating countries
- Limited skills and knowledge of inbound tour operators to promote and market Ethiopia in the international markets
- Lack of proper branding, effective positioning and qualitative presentation of products in terms of the modern working knowledge of the tourism market
- No clear market segmentation and priority in terms of domestic, international and regional and sub-regional marketing network
- The absence of concerted efforts in networking, collaboration and partnership among the services providers in the tourism and travel marketing as well as hospitality companies
- The absence of branding of specific packages and destinations of the different regions of the country
- The absence of a tradition of organising international and regional tour and travel trade fairs and events in the country
- The absence of structural arrangements and concerted efforts in marketing and handling events and MICE tourism marketing activities as it is the most important activity for the country

Despite these constraints, there is a lot of effort going on by both the government and private stakeholders working in the marketing activities of the Ethiopian tourism industry. For instance, there are more than 300 inbound tour operators and travel agencies and associations focusing on Ethiopia today. Some of these organisations and associations have jointly featured in some of the world's leading tourism and travel trade fairs such as ITB (Berlin), WTM (London), BIT (Milan), TOPOREZA (Paris), FITUR (Madrid), VACANTEBOURS (the Netherlands) , MITT (Moscow), ATM (Dubai), COTTOM (Beijing) and other events together with the Ministry of Culture and Tourism and the Ethiopian Airlines. In addition, some of the national inbound tour operators are also using their respective websites to market and sell their packages. However, the activities of these tour and travel organisers are not well coordinated and the marketing structure that would help to link their activities to the international tour operator channels is not well developed. Besides, there is no significant number of international hotels chains in the country that can perform channel marketing activities.

Due to these facts, Ethiopia is in a weak position in terms of international tourism marketing. Accordingly, the government of Ethiopia has now started to take important strategic steps towards structuring the Ethiopian tourism industry marketing. The most important measures are the establishment of the Ethiopian Tourism Transformation Council (ETTC), the Ethiopian Tourism Board (ETB) and the Ethiopian Tourism Organisation (ETO). For example, the main mandates of the Ethiopian Tourism Organisation are tourism destination development and marketing Ethiopia with the collaboration of the various stakeholders involved in the Ethiopian tourism business industry.

To support these structural arrangements, the government is conscious of the necessary requirements of policy and regulatory projections to facilitate the tourism marketing activities in particular and the development of tourism as an industry in general. Towards this end, the Tourism Transformation Council is the highest legal body led by the Prime Minister of the Federal Democratic Republic of Ethiopia. All the Federal Ministers, the regional states presidents, religious leaders, board presidents of relevant civic societies, the Ethiopians Airlines and celebrities are members of the Council.

The Council meets twice a year to audit the performance of the sector and deliver important directions and decisions. On the other hand, the Ethiopian Tourism Board is organised from different relevant federal governmental and private institutions. The Board is responsible for closely overseeing the activities of the Ethiopian Tourism Organisation. Finally, the Ministry of Culture and Tourism remains the policy-making body at the federal level.

Going forward, it is crucial that the diverse range of activities currently available is profiled with a view to providing visitors with appropriate information. In line with this, it will be necessary to increase repeat visitation and to ensure that, owing to the industry's seasonality, the peak and trough periods are smoothed so that there is a steady flow of visitors throughout the year. In addition, it will be important that the promotion and marketing of other non-traditional tourism areas is stepped up so as to increase the dispersal of visitors across the country. What is more, it would appear that the current marketing efforts are concentrated in the traditional Western tourist markets which are now increasingly being constrained by issues such as the global financial crisis and carbon taxes on long-haul travel, yet indications are that there is great potential in the domestic, regional and emerging economies of Asian markets. All these, nonetheless, call for intensive market research which will in turn inform appropriate policy formulation.

2.7 Tourism Infrastructure

Usually categorised as primary, secondary and tertiary, tourism infrastructure is an important aspect of destination competitiveness. Primary tourism infrastructure basically refers to facilities and services, such as accommodation (hotels, resorts, motels and lodges), restaurants and travel/tour operation services. In other words, these are tourism specific facilities and services that visitors make use of whilst on vacation.

Secondary infrastructure refers to such facilities as shopping malls or centres, museums, recreation, entertainment and visitor information centres. Tertiary tourism infrastructure, on the other hand, refers to those facilities and services that are not tourism specific or related, but nonetheless are important in enhancing visitor experience. These include, health services or care, emergency, postal, financial and personal services.

Though the situation on the ground is rapidly changing, the availability and quality of these facilities and services remain a major challenge facing the country in its endeavour to develop as a globally competitive destination. The country, for instance, lacks a sufficient number of 5, 4 and 3 star rated facilities and those that are available are mainly concentrated in Addis Ababa. In fact, key destinations in the country, such as Lalibela, Aksum, Arba Minch and Gambela, experience inadequate accommodation facilities that could be described as being of tourist standards.

Though this situation is changing with a hotel construction boom being witnessed in most areas within the country, which is quite a welcome development, there is need to adopt a cautionary approach because there is lack of clarity on a number of issues. For instance, given paucity of reliable data, several questions arise including: what is informing the current construction boom or guiding the type of facilities

being put up, whether there is a danger of over-supply, and whether there are any considerations about zoning issues. For instance, a number of hotel investors view the AU and UNECA as key markets in deciding on hotel development. However, majority of the meetings held in these two venues tend to be seasonal and sometimes ad hoc. As such, it is not clear how such hotels are utilised during the period in-between the AU or UNECA meetings. Perhaps, it is for this reason that the country is ranked fairly well in terms of its *price competitiveness, purchasing power parity and hotel price index*, for which it is ranked 22, 2 and 40 respectively globally, compared to countries like Kenya, Uganda and Tanzania in the region which did not fare as well. The country should capitalise on this comparative advantage.

The above notwithstanding, in terms of the available number of hotel rooms, Ethiopia is ranked 134 out of 140 economies globally compared to Kenya, Uganda and Tanzania at positions 122, 121 and 118 respectively. This indicates the existence of sizeable demand for good quality accommodation facilities throughout the country ranging from non-rated or unclassified to 5 star ones. There is need for a strategy to guide and inform the development of such infrastructure, which could, for example, detail the number, type and class of accommodation facilities required in different parts of the country for which necessary incentives could be availed. This includes investor support, infrastructural support, legal support and so on.

Furthermore, the quality and standards of existing accommodation facilities on the whole, continue to pose a major challenge throughout the country given the constraints in reinforcing the classification system. For instance, the sole data on hotel classification for the period 2009 and 2010 only shows the number of hotel rooms under each category with no indication of the number of hotels and where they are located. During this period, over 60% of all the hotels were unclassified with the number growing from 60.55% in 2009 to 69.28% in 2010 (Table 2.10). This raises questions concerning the control of the quality of accommodation facilities and services in the country.

Table 2.10: Distribution of Classified Hotel Rooms in Ethiopia

Total	Year							
	2009		2010		2011		2012	
	Count	%	Count	%	Count	%	Count	%
5 stars	794	5.62	794	4.38	No data	-	No data	-
4 stars	921	6.52	921	5.08	No data	-	No data	-
3 stars	1,691	11.98	1,691	9.33	No data	-	No data	-
2 stars	1,465	10.38	1,465	8.08	No data	-	No data	-
1 star	698	4.94	698	3.85	No data	-	No data	-
Unclassified Hotels	8,549	60.55	12,559	69.28	18128	100	19998	100

Source: Tourism Statistics Bulletin, 2009-2012 (MoCT)

The secondary and tertiary infrastructure is equally not well developed throughout the country to support a competitive tourism industry. For instance, increasing the length of stay is currently being pursued as a strategy for increasing tourist expenditure. However, and perhaps with the exception of Addis Ababa to some extent, there are hardly any other recreational activities or entertainment places that can engage visitors who are visiting the main attractions across the country. Moreover, visiting destinations outside the capital requires one to carry cash, more so, in local currency, because of lack of ATMs and foreign exchange bureaus. Though petty crime is minimal in the country, the fact that one is compelled to travel with cash may affect visitor experience during travel. In this regard, provision of such facilities and services greatly enhance destination competitiveness and the country is ranked at position 135 out of 140, implying a lack of competitiveness (WEF, 2013).

2.7.1 Summary of Key Issues

From the foregoing situational analysis, it is evident that there is a general lack of tourism infrastructure across the country; which is a major obstacle towards enhancing the country's destination competitiveness. As noted, apart from Addis Ababa to some extent, most of the major tourist destinations lack appropriate tourism infrastructure that is necessary to spur tourism growth and development. In Addis Ababa, on the other hand, there is notably a hotel construction boom, which though welcome, it is not readily clear what is informing such development.

Furthermore, the issue of quality and standards of the existing facilities and of those being constructed remains a major issue, given that tourism professionals are rarely consulted during their construction. This has meant that some of the facilities cannot effectively function as hospitality facilities catering for tourists because they lack basic standard facilities. In addition, due to the lack of a clear regulatory framework to enhance quality and standards, some accommodation facilities have taken the task of classifying themselves into their preferred rating with little regard to the quality of the facilities and service delivery offered. It is important to note that while efforts are being made by the MoCT to classify the hotels, the situation is further confounded by lack of clear criteria to carry out such classification. This has reportedly resulted in disagreements between MoCT and the regional authorities over the exercise of classification of hotel facilities.

Additional issues noted by the tourism stakeholders include: the fact that the facilities are mainly concentrated in main cities leaving the country-side unserviced; poor architectural and structural designs; scarcity of budget facilities such as youth hostels; the majority of the hotels are not built to international standards; absence of zoning policies to establish the areas where hotels should be constructed; and lack of incentives like land and affordable financing for investment. In addition, the stakeholders also noted that the existing tour firms, though few, are staffed with under qualified manpower that generally lack professionalism and ethics, and demonstrate low consideration for customer service.

It is worth noting that in previous times the government invested in tourism infrastructure because of the then under developed private sector. This is no longer the case because such drive seems to be spear-headed by the private sector. However, it may be necessary in some cases, particularly, when considering opening up new destinations in the country where the private sector may be weak or not willing to invest, for the national government to invest in such facilities with a view to spurring tourism development. Importantly, therefore, a conducive investment environment is essential to spur the development of international class facilities for the tourism sector including: providing appropriate support infrastructure for the private sector to invest in the development of tourism infrastructure. Nevertheless, such development should be informed by some form of national and regional frameworks so as to ensure that such investments are in line with the broader goals of tourism development agendas. This will also ensure that development of such facilities and sector-specific infrastructure is not haphazard, but rather in line with the broader tourism development plans.

2.8 Human Capital and Resources

An important component of destination development and competitiveness is the availability of high quality human resource. Indeed, the most competitive destinations of the world, such as Switzerland, France, Spain, USA, China, Italy, United Kingdom, Malaysia and Singapore, have correspondingly high quality human resources.

This is, however, a major challenge facing the country in its endeavour to become a globally competitive tourism destination. The country has, for instance, a limited number of institutions offering tourism training programmes both at the graduate and post graduate levels and at the certificate and diploma levels (World Bank, 2006). The certificate and diploma institutions, further, are under the control of the Technical and Vocational Educational Training Agency, while the Universities remain under the Ministry of Education as per the Higher Education Proclamation (Ethiopia Government, 2009). As such, the MoCT does not exert direct control over institutions that offer tourism training programmes which exacerbates the endeavour to oversee or enforce guidelines that could improve the quality and relevance of such training or the establishment of centres of excellence.

The lack of clear control and coordination of tourism training in the country has resulted in the lack of appropriate skills and knowledge amongst the graduates being churned out by the various training institutions. There are also issues relating to the qualification of tourism trainers (World Bank, 2012). Employers have, in addition, raised concern over the quality of such graduates and now prefer older professionals albeit with lower credentials, arguing that these do not need retraining. Furthermore, there are unethical practices of 'poaching' staff from other establishments with incentives of better pay and other prerequisites. The high demand for qualified personnel, moreover, has made employers reluctant to release their employees for training arguing that once such employees get trained, they always opt for better opportunities given that the existing pay levels are very low. There appears to be a vicious cycle in terms of human resource development where on the other hand, the quality of training is wanting while on the other hand, employers appear to discourage Continuous Professional Development (CPD). This impacts negatively on the quality of service delivery because there is no regulation compelling them to employ people with appropriate qualifications, skills and knowledge.

To achieve her goals of tourism development, the government must ensure that there is a consistent supply of labour who have been trained to international standards. In addition, mechanisms may be required to compel, rather, encourage employers to engage people with the right qualifications. This will require both short-term strategies such as CPD for those already in industry and exchange programmes; and long-term strategies including appropriate and up-to-date curriculum development. For purposes of illustration, Table 2.11 below presents select human resource indicators of the WEF TTCI for select countries drawn from the region and across the world to facilitate further analysis and to serve as potential benchmarks for the country.

The analysis is a testimony of the situation facing the country's tourism human resources: the extent of staff training is low owing to poor quality of the educational system and lack of specialised research and training; and while the country could leverage on skills transfer, it is quite not easy to hire foreign labour into the country. However, there are lessons to be learnt and opportunities that could be leveraged upon by the country, both regional and international, to improve the prevailing human resource condition in the country.

Table 2.11: WEF TTCI Select Human Resource Indications of Select Countries

Country	Overall Ranking (out of 140)	Quality of Educational System	Availability of Specialised Research and Training	Extent of Staff Training	Ease of Hiring Foreign Labour
Switzerland	1	1	1	1	24
Singapore	2	3	16	3	37
Malaysia	28	14	17	7	45
Kenya	106	37	64	69	73
Rwanda	110	50	109	68	18
Uganda	114	68	90	98	8
Ethiopia	**126**	**84**	**132**	**127**	**112**

Source: WEF, 2013

In the region, based on their respective rankings, Kenya, Rwanda and Uganda provide valuable lessons for the country. Kenya, for instance, has fairly well-developed tourism training and research institutions, for which it is ranked 37th, 64th and 69th for the quality of educational system, availability of specialised research and training, and extent of staff training respectively.

Given the cordial relationship that exists between Kenya and Ethiopia, and the on-going implementation of the Sustainable Tourism Master Plan for the IGAD region, it will be beneficial to explore avenues for collaboration, such as exchange programmes at all levels in government, in the private sector and in academia. Further, given the fact that the prevailing human resource capacity is somewhat limited and for which the country is ranked 129th globally, it will be necessary to ease restrictions for engagement of foreign experts, albeit with the sole objective of promoting skills and knowledge transfer. This has been done in Kenya and is now being done in Rwanda and Uganda, which ranked 18th and 8th respectively globally.

It is also worth noting that in Kenya, the Swiss Government (ranked top in the world in terms of the quality of its human resource (Table 2.11)) was instrumental in laying the strong foundation for the development of the prevailing tourism human resource base. The bilateral collaboration, among others, saw the positioning of Kenya Utalii College and its Utalii Hotel (a three star training facility), both under the Kenyan Ministry of Tourism, as the cornerstone for tourism training not just in Kenya, but in Africa as a whole. For instance, in Ethiopia, a number of tourism professionals in the country are Kenya Utalii alumni. Likewise, it will be important to explore such global opportunities to ensure that the quality of human resource training in the country is of international repute by benchmarking the most competitive destinations globally.

2.8.1 Summary of Key Issues

The availability of skilled human resources is a major challenge facing the tourism industry in the country. This is exacerbated by the perception that the institutions mandated with the responsibility of human resource development are not adequate and that the existing ones do not even have the capacity to produce highly trained graduates. This has resulted in the industry expressing their dissatisfaction in this regard, with employers arguing that they still have to retrain such graduates. In some cases, the lack of sufficient human resources has led to scenarios where employers are reluctant to provide CPD to their staff for fear that they will lose them once their skills are enhanced to better paying opportunities. This has meant that such employers have maintained low wages thereby attracting personnel who are not

qualified. Such scenarios points to a vicious cycle of human resource development where institutions are churning qualified graduates while employers are not employing qualified personnel yet remain reluctant to investing in further training.

This sector has been noted by stakeholders as experiencing a general lack of competent manpower at all levels; policy, training, business management and operations. Further to the above challenges, a number of challenges were identified by stakeholders as being drawbacks for the sector's HR capacity including:

- Training that is not market-oriented with training programmes lacking strong industry experience focus
- Communication barrier challenges for those working in the industry due to lack of language skill particularly in English and other international languages
- Absence of motivation for private enterprises to join training institutions
- Weak links between the tourism businesses and training institutions
- Lack of adequately qualified manpower in the tourism offices both at national and regional level
- Lack of clear policy on manpower training and development for the tourism sector

It is clear that human resource development is key to enhancing the competitiveness of any given destination due to the fact that the leading destinations of the world also have corresponding high qualities of human resources. Given that the tourism industry is largely service oriented, the role of human resources is of paramount importance. When considering the development of human resources, it is essential that the issue is addressed holistically.

Human resources do not simply refer to those working directly in the industry or private sector, for that matter; but also include those who are charged with the responsibility of planning and developing the tourism industry. In the first instance, human resource development is usually geared towards enhancing the skills and knowledge of those providing the services for the tourism industry.

In the second instance, human resource development is geared towards enhancing the capacity of government officials and higher education lecturers to better plan, research and develop the country as a destination. In addition, it is equally important to create awareness on the importance of the tourism industry in the country among government officials whose dockets may impact tourism one way or the other, for example, immigration officials, infrastructure, finance and so on.



The condition of access roads to and within a number of key attractions/destinations remains in a deplorable state and, in some cases, attractions are hardly reachable. It is not uncommon for animal transport to be used in such circumstances.

PHOTO: Horse and carts



2.9 Tourist Safety and Security

Generally, Ethiopia is relatively among the most politically stable countries in Africa. Security or lack thereof, would not be a threat to incoming tourist. Since the end of the cold war, Ethiopia has become one of the few countries in the world to provide a safe atmosphere to all its destination areas. Recently, Ethiopia was ranked as the 15th Safest Countries in the World to Settle In 2014.[1]

Important to note is that unlike any other economic sector, the tourism industry is highly sensitive to external factors such as terrorist activities, political and civil unrest. In this regard, the country is considered to be one of the most politically stable countries in Africa.

Further, the country's security is also acknowledged by the Global Competitiveness Report 2013–2014. It ranks the country more favourably than, for instance, Kenya and South Africa in a number of key aspects including business costs of crime and violence, organised crime and reliability of police services.

Though this relatively positive image of the country remains, a number of challenges were identified from country-wide stakeholders' consultations facing visitor safety and security including petty crimes, lack of emergency rescue services, limited quality health institutions, lack of consideration for the needs of the tourism sector while drawing up health-sector planning and policies, and relatively high level of road accidents due to factors as poor road design and unsafe road use practices.

There is currently no clear framework for tourism safety and security in the country. Security issues are generally dealt with by the police at both federal and regional levels while local militia provide informal security services in some cases. There is, however, need for a national tourism safety and security strategy.

A tourism safety and security strategy that would include formal communication channels among concerned stakeholders must be in place and which the sector is now lacking. Further, even though this system of tourist safety and security is part and parcel of the overall national home security system, there is a need to upgrade the national capacity of tourism-specific security personnel including wildlife rangers, scouts and other officers in terms of logistical facilities and diverse skill development programmes.

[1] http://www.lifestyle9.com/top-10-safest-countries-to-live-in-the-world/4/

2.10 Tourism Support Services and Infrastructure

Tourism being an economic sector relies on a number of support services and infrastructure for its growth and development including transportation infrastructure, ICT, electricity, communication infrastructure, among others. Table 2.13 presents Ethiopia's performance in a number of infrastructure aspects relative to other regional economies.

Table 2.13: Global Ranking of the State of Infrastructure in Selected African Countries

Indicator Ranking (out of 148)	Ethiopia	Kenya	Rwanda	Botswana	South Africa
Quality of overall infrastructure	112	68	62	78	63
Quality of roads	69	67	47	59	41
Quality of railroad infrastructure	111	74	n/a	59	48
Quality of port infrastructure	121	78	103	102	51
Quality of air transport infrastructure	42	62	80	94	11
Available airline seat km/week, millions	57	54	131	141	25
Quality of electricity supply	115	100	92	113	101
Mobile telephone subscriptions/100 pop.	147	122	137	20	34
Fixed telephone lines/100 pop.	130	137	139	101	100

Source: The Global Competitiveness Report 2013–2014 (2013 World Economic Forum)

Some of these aspects are discussed in the sections below.

2.10.1 Transport Infrastructure

Though not usually specifically geared towards meeting the needs of the tourism industry, transport infrastructure is an integral element of destination competitiveness. Good transport network facilitates access to and from, and within destinations and hinder or promote tourism. This is well acknowledged by the GTP (2010-2015) noting the pivotal role that roads and air transportation infrastructure play in tourism development [2]. Transport infrastructure can broadly be categorised as air transport and ground transport.

Air Transport

Accounting for over 50% of all international tourist arrivals globally, air transport infrastructure is of great importance to any given destination in terms of promoting both external and internal access. Furthermore, particularly in destinations where ground transport is unreliable or where countries are expansive as is the case with Ethiopia, air transport can play an integral role in enhancing internal access to areas of touristic interest.

The calibre of air transport infrastructure is usually pegged upon both the quantity (measured in terms of available seat kilometres both domestic and international, number of departures, airport density, number of operating airlines), the quality of the air transport infrastructure both for domestic and international flights, and the international air transport network. Comparatively, the country is well developed in terms of the prevailing air transport infrastructure both for domestic and international purposes, as Table 2.14 demonstrates.

[2]See GTP 2010-2015 p.32 and p.46

Table 2.14: Ethiopia Air Transport Infrastructure Assessment (by 2013)

Performance Indicators	Score	Rank (out of 140)
Overall	**2.6**	**90**
Quality of air transport infrastructure	5.1	50
Airline seat kms/week, million	3.7	61
Airline seat kms/week, int'l, millions	183.1	63
Departures/1,000 pop.	0.6	107
Airport density/million pop.	0.3	113
No. of operating airlines*	11.0	112
International air transport network	5.2	51

Source: TTCI 2013 report

The construction of a second terminal at Bole International Airport and the proposed expansion will go a long way in further enhancing the quality of air transport infrastructure in the country. Moreover, the role played by the national carrier in facilitating travel to and from the country and within the country, has been crucial in this regard. Currently, the official number of airports spread across the country is 19, with more being opened; of these, four are international airports.

It is important to note that for quite a long time, Ethiopian Airlines has been the sole domestic scheduled carrier operating within the country facilitated by a subsidy programme to keep costs down mainly for residents. It is, however, encouraging that the Ethiopian Civil Aviation Authority (CAA) has drafted a new air transport policy which will increase the number of seats on private domestic flights to 50 from the current 20. This, in turn, together with the growing status of Bole International Airport as a regional hub, is expected to boost the number of visitors into the country. It would, nevertheless, be advisable that the country considers more incentives to increase the number of tourist arrivals into the country including relaxing visa requirements for targeted source markets and expanding the bilateral air agreements to target key source markets.

Ground Transport

As with air transport, ground transport which accounted for 42% of the total number of international tourist arrivals in 2013 (Figure 2.2), is an integral part of any given destination. In fact, and to a large extent, without a certain mode of ground transport, air transport would be rendered almost irrelevant. In other words, destinations could still thrive even in the absence of air transport, but the same does not apply with the case of ground transport. Ground transport is usually categorised as road, rail and water.

Being a landlocked country and in the absence of navigable water ways, road transport remains the most commonly used mode of ground transport for tourism purposes. The Growth and Transformation Plan (GTP) 2010-2015 upholds the importance of roads as an avenue through which the growth and development of key economic sectors, such as agriculture, industry, mining and tourism, could be fostered. Table 2.15 below highlights the prevailing situation regarding the quality and quantity of the road network in the country and the projected targets as set out in the GTP.

Arguably, following the *Road Sector Development Programmes* that were launched in 1997, there has been a remarkable improvement in road transport infrastructure. The country now has, comparatively, both good quality and quantity of road networks connecting key cities and towns. In addition, road transport has played and continues to play a vital role in supplementing air transport in terms of providing direct access to key attractions in the country.



In 2014, Ethiopian Airlines became the largest African carrier by revenue and profit according to the International Air Transport Association (IATA).

INSET: Ethiopian Airlines Boeing 787 Dreamliner at the Boieng facility in Washington DC. Ethiopian Airlines was the first airline in Africa to get the Dreamliner.


opian
00

Table 2.15: GTP Targets for Roads

Indicator	Baseline 2009/10	Plan Target 2014/2015
Road Network	49,000	136,000
Average time to all weather roads (hrs)	3.7	1.7
Road density (km/1000km^2)	44.5	123.7
Road density (km/1000 population)	0.64	1.54
Roads in acceptable condition (%)	81	86.7
Proportion of area further than 5km from all-weather roads (%)	64	29

Source: Ethiopia Government, 2010.

However, despite their importance, the condition of access roads to and within a number of key attractions/ destinations remains in a deplorable state and, in some cases, attractions are hardly reachable. It is not uncommon for animal transport to be used in such circumstances. For example, the road from Lalibela Airport to Lalibela is in need urgent of maintenance. One requires animal transport to access some of the monasteries in the area which at times could be very time consuming.

Furthermore, the potential link road between Lalibela and Aksum is in very poor condition and is rarely ever used. Likewise, key natural attractions in the country, such as Simien National Park and Nechisar, are hardly accessible even with the use of rugged vehicles. To access the key attraction in Nechisar, for example, one would require about 8 hours in travel time alone due to the poor condition of roads in the park.

As the country continues to search for strategies to increase the length of stay, the potential of road transport to provide a solution appears not to be upheld. In fact, road transport should also be viewed as a strategy for increasing tourist-spend in the country if the infrastructure is well organised and developed. As already mentioned, the country's main roads and highways are generally in good condition.

Given the size of the country, which means that there are large distances to be covered, there are hardly any reliable stops or tourist activities between major cities or destinations. For instance, on the Southern routes, activities, motels or facilities of tourist standards are very limited even in some of the major towns. As a result, there is no incentive for tourists to make stopovers whilst enroute to their destination. They are compelled to drive long distances which is tiring and monotonous, thereby making air transport an attractive option for most tourists.

Figure 2.15, indicates that 41% of international tourists arrive at their destination by using road transport. This is particularly more common in Europe and is increasingly becoming the case within Southern Africa and regional countries such as Rwanda. For instance, of the 1.1 million visitors Rwanda received in 2012, about 85% of these arrived in the country by road; further, 85% were from Africa, a testament to the growth of regional tourism.

Likewise, Ethiopia receive a number of tourists by road and these are mostly from the neighbouring Djibouti. Road transport infrastructure should be viewed as an avenue through which the country's huge domestic tourism potential could be tapped. With the right strategies, the current regional infrastructural development and expansion to link with neighbouring countries could also provide an opportunity for regional tourism growth and development. Indeed, with the LAPSSET project, Kenya

proposes to construct three resort cities to promote and diversify its range of tourism products and to tap into the regional and domestic markets. This should also be viewed as an opportunity to further exploit opportunities emerging for the road sector development programmes.

The other two modes of ground transport, rail and water, are rarely used in the country and as such are not very relevant to tourism currently. Nevertheless, given the infrastructural development prospects highlighted in the GTP, there is need to rethink this stance especially within the context of rail transport. The government, for instance, proposes to construct 2,000km of railway network by 2015 and a total of 5,000km by 2020. The fact that the government has secured a number of commitments towards the realisation of this project is quite encouraging.

Of interest to tourism is the fact that the proposed railway network will pass through some of the key attractions in the country, especially those in the north and that some of these routes are of outstanding beauty. For instance, the proposed route in the north will run from Mekele-Woldiya Hara-Gebeya-Sumera-Dicheto-Elidar- with a link to Port Tadjourah in Djibouti and an additional extension via Woldiya-Awash to join the Addis-Djibouti route.

Given that this project is at the inception stage, this will be an opportune time to incorporate tourism concepts so as to further maximise opportunities from the proposed developments. In other words, such developments should not just be viewed as simply a means of transporting visitors, but also as potential attractions in themselves. Examples, such as the Orient Express and the Royal Scotsman are now key attractions and could be described as over-land cruises given the services offered including accommodation and fine dining.

Similarly, water transport is not as developed, but has the potential to diversify the tourism product in the country owing to the numerous Rift Valley lakes and rivers that exist. Nonetheless, water transport is also required to access a number of attractions, such as the monasteries at Tulu Gudo Island in Lake Ziway, the crocodile market in Lake Chamo at Arba Minch and the island in Lake Shalla. In addition, it is worthwhile to explore the potential of having cruises in some of these lakes as a way of expanding the range of tourism products on offer to tourists.

2.10.2 Information and Communication Technology

Information and Communication Technology (ICT) is increasingly becoming an integral part of destination competitiveness as the world becomes more and more interconnected. This has opened the door to more players; each eying the same global market with consumers ever being presented with a growing array of products from which to make informed choices.

Indeed, the internet is now an important medium for taking products to the global market from a supply perspective and an important source of information from a demand perspective whereby potential consumers are able to gauge the quality of products and services on offer in any given destination. In the case of marketing, it is now almost essential that tourism suppliers have their products well presented on the internet from which potential tourists could gather the relevant information with a view to consuming such products. It is now estimated that over 70% of travellers use ICT to plan their travel.

In addition, the ICT infrastructure is now an important source of information for tourists particularly on issues relating to safety and security, and quality and standards of products and services in any given destination. Most tourists visit relevant respective government sites for information on the prevailing safety and security situation in the destination they wish to visit. In this regard, a number of Western countries including the US, UK, Australia and New Zealand, still maintain negative travel advisories to


eLearning
Africa
10th International Con
on ICT for Developmer
& Training
eLearning
Africa
eLearning
Africa
AFRICAN UNION
AFRICAN UNION
eLearning
Africa
eLearning
Africa



certain parts of the country (see safety and security section). In addition, sites such as TripAdvisor, which allow independent comments and views from users, are now important sources of information regarding, say, the quality and standards of products and services on offer.

Generally, ICT infrastructure refers to a wide array of both existing and emerging technologies that range from simple to complex such as; fixed and mobile telephony including Short Message Service (SMS), digital cameras, Computer Reservation Systems (CRS), Global Distribution Systems (GDS), internet which is accessed through channels such as broadband channels, fibre-optic, wireless (WiFi, WiMAN), Voice over Internet Protocols (VOIP), Geographical Positioning Systems (GPS) and Geographical Information Systems (GIS). On the basis of such ICT infrastructure, the country has been ranked at a lowly position 138 out 140 globally (WEF, 2013). Table 2.16 below provides a breakdown of the parameters used to rank the country.

Information and Communication Technology (ICT) is increasingly becoming an integral part of destination competitiveness as the world becomes more and more interconnected.

PHOTO: The 10th International Conference on ICT for Development, Education and Training held in Addis Ababa from the 20th -22nd May 2015.

Table 2.16: Competitiveness of Ethiopia ICT Infrastructure

Indicator	Ethiopia's Global Ranking out of 140
Overall ICT Infrastructure	**138**
ICT use for business to business transactions	128
ICT use for business to customer transactions	131
Individual use of internet (%)	139
Fixed telephone lines/100 population	125
Broadband internet subscribers/100 population	136
Mobile telephone subscriptions/100 population	140
Mobile broadband subscriptions/100 population	116
ATMs accepting Visa cards/million population	135

Source: WEF, 2013

The TTCI report notwithstanding, there has been significant progress in ICT infrastructure development, mainly in terms of enhanced access. For instance, though considerably low, the percentage of the population having access to the internet has increased from a paltry 0.02% in 2000 to 1.48% in 2012, while fixed (wired) broadband subscription has grown from only 57 in 2003 to 37 ,754 in 2012 (ITU, 2013). Consequently, in most destinations one is now able to access the internet. In addition, the number of mobile phone subscriptions has increased from just 17,757 in 2000 to over 20 million in 2012. It is worth noting that both the quality and access to ICT infrastructure is likely to improve and expand respectively given the recognition of its importance and strategic focus as envisioned in the GTP 2010-2015.

The foregoing discussion, though general in approach, has implications for tourism development in the country. From Table 2.7 above, for example, it is clear that the use of ICT infrastructure for both business to business and business to customer transactions within the tourism industry in the country is not widespread and competitive given the low rankings. Further, the proportion of tour operators or accommodation providers using ICT infrastructure to sell their products and services is still comparatively low, with many relying on traditional methods of selling such as brochures and external intermediaries in the source markets. Importantly though, there has to be a deliberate government effort to safeguard the image of the country featuring in such ICT media and by extension tourism suppliers by ensuring that their respective products and services are of good quality. There is need, therefore, to have a destination management system (DMS) to mitigate the negative impacts that ICT may have on the destination and maximise opportunities presented therein. Such a system should, in the form of in-depth database, provide an avenue through which tourism products and services on offer in the country are amalgamated and taken to market through various channels and platforms. Ideally, the DMS should be comprehensive and should encompass issues relating to:

- Product management such as providing accurate information/data on tourism suppliers, services and tourist activities;
- Enquiry management services i.e. providing advice to potential visitors on, say, accommodation, bookings and other information requests;
- Visitor/customer relations management i.e. gathering relevant information on the basis of enquiries, complaints or compliments, among others, to better manage the destinations and gather market intelligence;

- Business customer relations management mainly facilitating e-tourism transactions; and
- Management reporting on the basis of all gathered information to facilitate strategic interventions for future destination development on the basis of predetermined key performance indicators which may include data on bookings or arrivals on, for instance, a monthly or quarterly basis, geographical distribution of tourist activity and so on.

In line with the above and given the restrictions on foreign currency transactions (owing to the fact that only a few hotels are certified to transact in foreign currency), the ICT infrastructure should be used to facilitate such transactions as credit/debit card transactions especially outside Addis Ababa. However, such infrastructure is very limited given that only a few establishments accept credit card payments and coupled with the fact that ATMs are few in the country (World Bank, 2012). It is perhaps for this reason that the country is ranked at position 135 (see Table 2.16) by the TTCI. Nonetheless, it is expected that the current efforts by the government such as the national payment system platform is likely to improve business transactions and to increase the number of ATMs across the country.

2.10.3 Summary of Key Issues

While the country has been billed as exploding in infrastructural development, particularly the transportation infrastructure, the infrastructural needs of the tourism sector remains largely unmet. Consequently, a number of attractions cannot be accessed.

Further challenges identified through the stakeholders' consultation forums indicated that the sector faces such challenges as:

- General delay in electric installation for new established hotels
- Very unreliable electricity supply causing a number of facilities to either acquire rather expensive generators, or experience blackouts
- Major roads are relatively good but significant problem is on quality and safety
- In some areas of the country, there was lack of adequate roads infrastructure making some attractions inaccessible
- In some cases, no infrastructure constructed especially outside of the parks, for example at the Chebera Chuchura National Park
- Some areas experience inadequate water supply
- Pollution related to infrastructural development is not well managed
- The ICT infrastructure in the country, though growing, is still inadequate in most of the tourist areas and is unreliable most of the times

It is important to note that the GTP (2010-2015) provides a broad framework for infrastructure development in the country. It is expected that tourism being a key economic sector, such infrastructure development should, to some degree, benefit the industry through an integrated development approach. However, given that the GTP infrastructure development focus is also on other sectors of the economy, it will be important that MoCT highlights the infrastructure development priority needs necessary for the development of a competitive tourism destination. This should further be done in line with the on-going regional infrastructural initiatives to promote both national and cross-border tourism. It is, nonetheless, important to note that such on-going initiatives should not be used as the only basis for tourism development, but rather, that tourism development initiatives should also serve as an incentive to expand the national and regional infrastructure networks.

2.11 Environmental Conservation and Sustainable Tourism Development

Nature-based tourism is seen in the country as an avenue through which the prevailing tourism product, which is predominantly cultural and heritage-based, could be diversified. It is worth noting that as the prefix suggests, nature-based tourism products rely heavily on the natural environment and, consequently, its sustainability and/or conservation is of critical importance to the long-term development of the industry. Table 2.17 below provides a comparative summary of some of the key environmental sustainability and conservation indicators for selected countries in the region. It is notable that though having one of the largest areas under forest cover, the country's rate of deforestation is comparatively high. In addition, the country also has one of the highest numbers of threatened mammals – wild animals – and bird species that are key attraction components in nature-based tourism.

Likewise, the TTCI 2013 report takes into consideration both natural resources available for tourism development and environmental sustainability as some of the indicators of destination competitiveness. In case of the natural resources available for tourism development, TTCI ranks the country globally at position 33 out of 140 compared to Tanzania, Kenya and Uganda, which are ranked at positions 4, 14 and 25 respectively. Some of the key factors considered in this regard include number of world natural heritage sites available in a country; number of protected areas (as opposed to size); quality of natural environment; and total number of known species.

Table 2.17: Deforestation and Biodiversity for Selected East Africa Countries 2008

	Forest Area ('000 sq km)		Average Annual Deforestation		Threatened Species				Terrestrial		Marine	
	1990	2007	1990-2000	2000-2007	Mammals	Birds	Fish	Higher plants	% of surface area	Number of Areas	% of surface area	Number of Areas
Eritrea	16	15	0.2	0.2	9	9	14	3	4.3	3	0.0	0
Ethiopia	**147**	**127**	**0.7**	**1.1**	**31**	**22**	**2**	**22**	**17.5**	**42**	**0.0**	**0**
Kenya	37	35	0.3	0.3	27	27	71	103	12.3	284	5.8	11
Rwanda	3	5	-0.8	-0.65	19	10	9	3	7.6	5	0	0
Tanzania	414	344	1.0	1.1	34	40	138	240	38.8	537	12.5	17
Uganda	49	35	1.9	2.3	21	18	54	38	26.1	732	0.0	0

Source: World Development Indicators 2010

It is encouraging to note that the country is not too far off when compared to the key nature-based destinations in the region. However, when it comes to environmental sustainability, the difference in ranking is quite remarkable with Kenya, Tanzania and Uganda being ranked at positions 21, 45 and 51 respectively, compared to Ethiopia's ranking at position 90. Some of the key factors considered here include stringency of environmental regulation; enforcement of environmental regulation; sustainability of the travel and tourism industry (mainly to do with prevailing policies to ensure that, for example, nature-based tourism is developed in a sustainable manner); percentage of threatened species; and environmental treaty ratification.

The above two sources of data provide some sort of benchmark for the country in its endeavour to exploit the prevailing natural resources for tourism development given that countries such as Kenya

and Tanzania are considered as some of the top nature-based destinations in the world. It is evident that the country possesses comparatively ample natural resources to support the diversification of the tourism product. Nonetheless, the main challenges, unlike Kenya, Rwanda, Tanzania and Uganda, relate to issues to do with environmental sustainability. Site visits and interviews with key stakeholders further reaffirm this concern. Generally, environmental regulation appears not be stringent enough, coupled with ineffective enforcement of such regulation. There is also a comparatively high percentage of threatened species and the country is relatively not strong in terms of proper compliance.

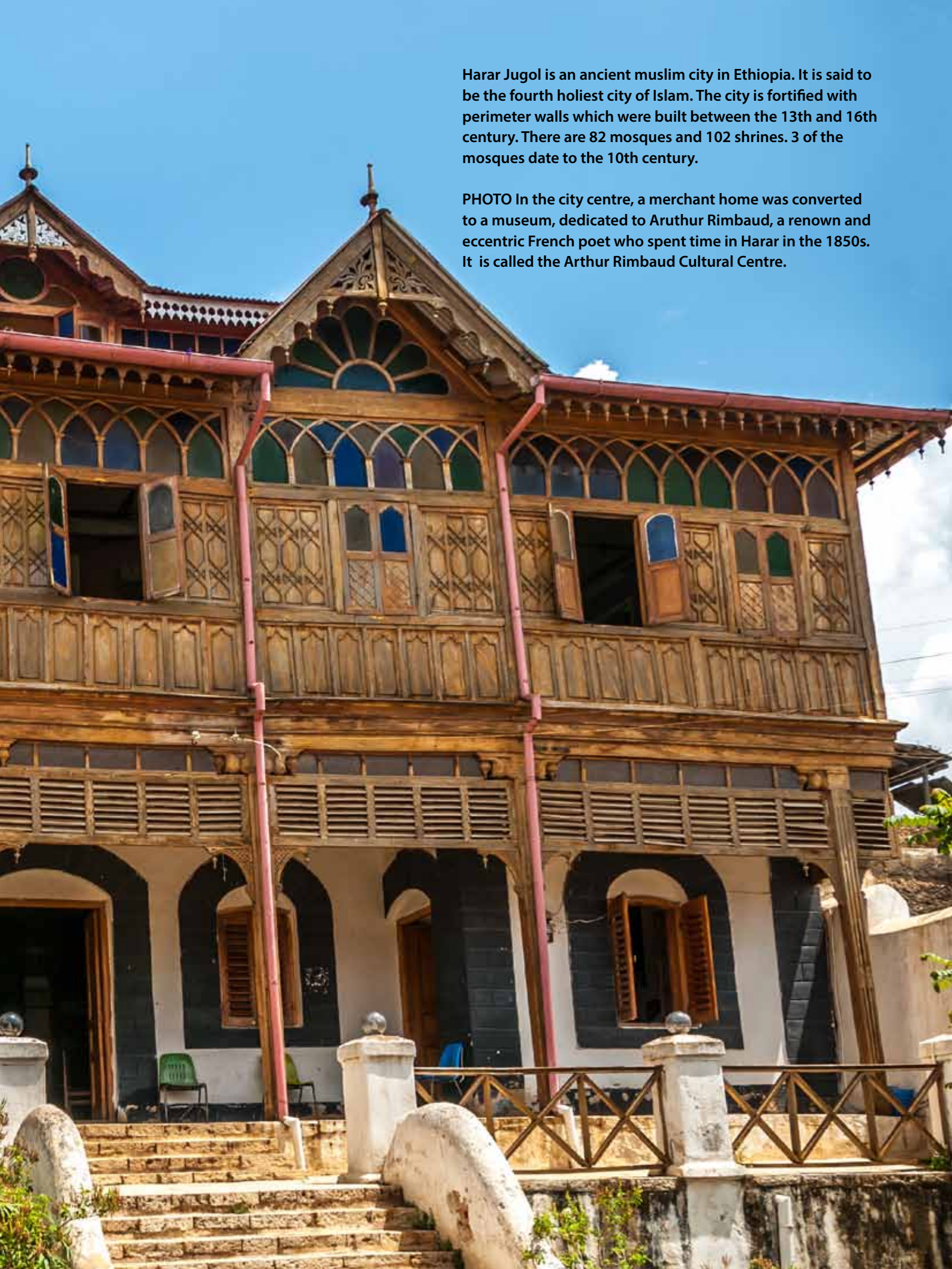
More specifically, the protected areas in the country face significant challenges ranging from human wildlife conflicts, human encroachment, lack of species or resource audits (which actually makes it difficult to ascertain the extent, for instance, to which species are threatened and hence the level of intervention required), poaching of both flora and fauna (e.g. charcoal harvesting, firewood etc.), lack of appropriate infrastructure such as access roads necessary to enhance both accessibility for visitors and more importantly, to better manage such areas.

These problems could be attributable to the lack of Protected Area Site Management Plans based on IUCN standards. However, it is important to note that it is not enough to simply have such plans; but that there should also be deliberate commitment to their implementation. Such plans should include, for instance, binding legal frameworks (gazetting), concisely detailed zoning schemes and programmes such as on ecological issues, tourism development, community partnerships where applicable, and protected areas operations and security supported with sound budgeting commitments.

It should be appreciated that the success and sustainability of the tourism industry in the country will depend on the extent to which such natural resources are sustainably exploited for tourism use. Conservation is one of the routes to achieving the sustainability of such resources. The relationship between tourism and the resources on which it relies, both natural and cultural, should be seen as being symbiotic. Tourism, for example, can be used as an effective force in the conservation of both natural and cultural heritage, by enhancing the intrinsic ecological values of biodiversity and for socio-cultural and economic development through the sustainable exploitation of the country's unique cultural heritage. It is essential that any approaches to conserving such resources, both policy and strategy considerations, take into account the crucial role of the tourism industry.

Moreover, it is worthwhile to note that, desirable as it is, tourism development could also have detrimental impact on the natural and cultural resources, particularly if it is not well managed. For instance, uncontrolled tourism growth and development, (and as has been observed in religious sensitive areas of the country), could have adverse effects on the local cultures due to differing social norms and values resulting in acculturation or demonstration effects, to mention but a few. Likewise, though it is currently not a major concern in the country, mass tourism could also have detrimental impacts on natural environments such as destruction of habitats and pollution. It is imperative that the relationship between tourism growth and development and the cultural and natural resources be well managed so as to maintain the symbiotic relationship and to leave it as intact as possible.





Harar Jugol is an ancient muslim city in Ethiopia. It is said to be the fourth holiest city of Islam. The city is fortified with perimeter walls which were built between the 13th and 16th century. There are 82 mosques and 102 shrines. 3 of the mosques date to the 10th century.

PHOTO In the city centre, a merchant home was converted to a museum, dedicated to Aruthur Rimbaud, a renown and eccentric French poet who spent time in Harar in the 1850s. It is called the Arthur Rimbaud Cultural Centre.

2.12 Policy, Regulatory and Institutional Framework

Policies, rules and regulatory frameworks are critical in ensuring the success or failure of any tourism development programmes in any given destination. Such frameworks are important in, for example, creating conducive environments for domestic investment and FDI, innovation, research and development, and appropriate skills and knowledge development. Generally, according to the TTCI, the prevailing frameworks are not conducive in terms of encouraging competitive destination development given the country's overall ranking of 132. Table 2.18 below provides a comparative illustration of the TTCI policy, rules and regulatory frameworks considerations for select countries in Africa.

Table 2.18: T&T Policy, Rules and Regulations Ranking for Select African Countries (2013)

	Overall rank (out of 140)	Prevalence of foreign ownership	Property rights	Business impacts of rules on FDI	Visa requirements	Openness of bilateral air service agreements	Transparency of government policymaking	Time required to start a business	Costs to start a business
Rwanda	6	76	34	18	16	68	7	5	47
Mauritius	28	80	36	9	28	73	41	16	43
Kenya	95	91	107	89	18	107	102	107	113
Uganda	80	32	78	31	12	106	57	111	126
Ethiopia	**132**	**132**	**77**	**111**	**118**	**57**	**125**	**68**	**137**

Source: WEF 2013

From Table 2.18 above, there are several policy, rules and regulatory related issues that need to be addressed to enhance travel and tourism competitiveness in the country. Though the country is now warming up to FDI in other sectors such as manufacturing, it would appear that the extant policies, rules and regulations in the country do not promote foreign ownership of tourism resources (be it in full or in partnership). In comparison, Uganda, with a global ranking of 32, appears to have put in place measures that have led to an increase in foreign ownership. Nevertheless, promotion of FDI should go hand in hand with the domestic investment as well, an area in which the country appears to be excelling.

However it is worth noting that an increase in FDI in the tourism sector signifies confidence in the local economy and could lead to an increase in the volume of tourists. In line with this, it appears that though comparatively ranked better than say Kenya, Mauritius and Rwanda, the country is not considered to have very strong policies or regulations that could enhance property rights, though the prevailing rules do not seem to encourage; a factor that could hinder both domestic and FDI. All the same, the prevailing rules do not seem to encourage FDI given the country's ranking of 111 in 2013.

One of the major challenges facing the tourism industry in the country is the stringent visa requirements for the majority of tourists visiting the country. The country has accordingly been ranked at position 118 by the 2013 TTCI compared to Uganda, Rwanda and Kenya at positions 12, 16 and 18 respectively. Rwanda, for instance, has scrapped visa requirements for a number of countries, while most African countries can now obtain visas upon arrival in the country.

This has seen an increase in its visitor numbers. In Ethiopia, visas are required of all visitors, with the exception of Kenyan and Djibouti nationals. The government requires that visas be obtained from the Ethiopian Embassies or Consulates, with the exception of the three-month tourist visas that may be obtained upon arrival in Addis Ababa Bole International airport by citizens of 36 countries[3]. These countries include some of Ethiopia's main leisure and business source markets. Business visas, including those attending conferences, must be obtained before departure to the country.

The stringent visa requirements are clearly an obstacle to not only tapping the international tourist markets but also the growing regional market. The IGAD STMP identifies this as a major impediment to regional tourism development and identifies strategies at the national level that need to be implemented by the member states so as to tap intra-regional tourist markets and to market the region as a single destination through the implementation of a regional visa for international tourists.

Accordingly, the country needs to embrace the spirit of the IGAD STMP in its endeavour to address visa challenges. A more flexible visa and customs regime has also been identified as an effective short-term strategic regulatory intervention with possible quick returns in terms of increased number of tourists and tourists' expenditure[4].

An area the country appears to be doing comparatively well is that of Bilateral Air Service Agreements[5], registering a TTCI ranking of 57. The prevailing policies have, therefore, been instrumental in attracting major airlines thereby making the country an international hub with direct flights to a number of destinations. For example, there are direct flights to and from key destinations such as USA, while Kenya is still negotiating to have the same.

[3] Argentina, Australia, Austria, Belgium, Brazil, Canada, China, Czech Republic, Denmark, Finland, France, Germany, Greece, India, Ireland, Israel, Italy, Japan, Kuwait, Luxembourg, Mexico, the Netherlands, New Zealand, Norway, Democratic People's Republic of Korea (North Korea), Poland, Portugal, Republic of Korea (South Korea), the Russian Federation, Slovakia, South Africa, Spain, Sweden, Switzerland, United Kingdom, United States of America.

[4] Ethiopia's Tourism Sector: Strategic Paths to Competitiveness and Job Creation by the World Bank and MoCT, October, 2013.

[5] Such agreements/arrangements contain the routes airlines can fly including cities that can be served within, between and beyond the bilateral partners; the number of flights that can be operated or passengers that can be carried between the bilateral partners; the number of airlines that bilateral partners can nominate to operate services and the ownership criteria airlines must meet to be designated under the bilateral agreement.

According to the TTCI, the policy formulation process in the country is not very transparent and is given a ranking of 127. Indeed, the tourism policy formulation process should be a very consultative process that takes into consideration the views of a diverse range of key stakeholders so as to minimise conflicts that may arise from tourism development given its dependence on both natural and cultural resources. Furthermore, from Table 2.8, though the prevailing policies, rules and regulations in the country are conducive for business start-ups, the costs of starting businesses, nonetheless, appear to be prohibitive. Table 2.19 provides the global ranking for select African states in terms of the ease of doing business based on selected considerations.

Table 2.19: 2013 Ease of Doing Business Global Ranking for Select African States

	Ease of doing business	Starting a business	Getting Credit	Protecting investors	Trading across borders
Djibouti	171	185	180	181	41
Eritrea	182	183	180	117	165
Ethiopia	**127**	**163**	**104**	**128**	**161**
Kenya	121	126	12	100	148
Rwanda	52	8	23	32	158
Sudan	143	122	167	158	153
Uganda	120	144	40	139	159

Source: World Bank (2013)

From Table 2.19 above, the Doing Business World Bank Report of 2013, covering 185 countries, generally ranks the country poorly at position 127 compared to Rwanda, for instance, which is now considered as one of the most favourable places to do business in Africa given its global position of 52. Whereas this report looks at the various policies, rules and regulations in terms of their impacts on businesses from a general perspective, they nevertheless have a bearing on tourism development. For example, in the case of Kenya with a global ranking of 12 in terms of the ease of getting credit, implies that investors are able to access financing to fund their respective ventures with relative ease, a factor that has seen an increase in both foreign and domestic investment in the country over the recent past, especially in the hospitality sector.

Likewise, trade across borders appears to be a major challenge facing the African continent as depicted by the select African states in Table 9, though at position 41, Djibouti appears to be doing considerably well. This could be attributed to the trade between Djibouti and the country owing to the port in Djibouti and the planned infrastructure development as already mentioned. Of interest is that there is a strong correlation between trade and tourist flows, such that the country also receives a considerable number of tourists from Djibouti. A deliberate strategy to increase trade with the neighbouring countries is likely to lead to an increase in tourist flows.

The foregoing, notwithstanding, it is important to note that the country has in place a National Tourism Development Policy, as mentioned in the introduction, which provides broad guidelines for tourism development and promotion and among others, will address some of the challenges identified. The policy recognises the important role the tourism industry can play in economic development and poverty alleviation and the need to shift gear to ensure the rapid growth of the sector. The national policy further advocates for the need to align tourism development with the broader national

development policies and strategies. Nonetheless, whereas the policy appears to emphasise the need to strengthen international tourism marketing and promotion of domestic tourism, there is hardly any focus, for instance, on the existing and emerging potential regional opportunities as clearly identified in the IGAD STMP. It is important that policy be updated to take into consideration such existing and emerging opportunities. Furthermore, owing to the federal system of government, there is concern among stakeholders that the regional tourism development instruments are not aligned to the broader national tourism development goals.

Likewise, the country has a number of institutions that are involved in tourism planning and development both at the national and federal levels. These institutions range from public, private to civil. At the national level, the Tourism Transformation Council (TTC), the Ethiopia Tourism Organisation (ETO) and the Ministry of Culture and Tourism are the key institutions whose main role is policy formulation, planning, regulation and the overall destination development. A number of parastatals are also under the ministry including, Ethiopia Wildlife Conservation Authority, National Cultural Centre, Authority for Research and Conservation of Cultural Heritage, National Archives, and the Catering and Tourism Training Institute. At the regional levels, tourism planning and development is coordinated by Culture and Tourism Bureaus. Some of these bureaus include, Southern Nation, Nationalities and Peoples' Regional State Culture and Tourism Bureau, Oromia Culture and Tourism Bureau, Harari Culture and Tourism Bureau, Somali Culture and Tourism Bureau, Afar Culture and Tourism Bureau, and Dire Dawa Culture and Tourism Bureau.

Several other institutions also exist including the Ethiopian Tourism Professional Association, Hotel Professionals Association, Ecotourism Association, Ethiopia Tour Operators Association, Ethiopian Hotel Owners Association and the Ethiopian Wildlife Association. Clearly, the presence of numerous institutions calls for a mechanism to better coordinate and manage the diverse goals which may in some cases be in conflict. A case in point is the issue of entry fees to a number of attractions across the country whereby, as a result of lack of coordination and consultations, certain actions may have negative impacts on other stakeholders. Further, as noted in the National Tourism Policy, the institutional capacity, particularly of both national and private sectors is somewhat weak. It is, therefore, hoped the proposed establishment of the Tourism Transformation Council will address some of these challenges, though, given the urgency, efforts need to be put in place to strengthen its capacity.

2.12.1 Summary of Key Issues

The prevailing environment appears not to be encouraging investment, more particularly, FDI, in the tourism industry as is observed in other sectors such as manufacturing, horticulture and agriculture. This could further be attributed to perceived lack of appropriate policies and/or regulation that enhance property rights which are essential in boosting investor confidence as per the World Bank Doing Business Report, 2013. In addition, the current stringent visa requirements are likely to impede tourism growth and development, and given that regional countries are now relaxing such arrangements, the country is unlikely to be competitive. In line with this, and given the emerging regional developments, there is need to align the migration policies with those of regional economic communities in which the country is a member, such as the planned single tourist visa for the IGAD region and the recommended scrapping of visa requirement amongst member states. Also, embracing such regional integration initiatives is likely to boost visitor numbers as well as boosting trade.

Though it is not a major challenge compared to regional countries, there is nonetheless need for continued and expanded bilateral air service agreements so as to enhance the country's position as an international hub. This could be achieved through the adoption of an open sky policy. In addition, there is need to review the existing domestic policies with a view to enhancing the competitiveness

of the domestic air travel and to opening up more destinations in the country. There is also need to harmonise tourism development instruments at regional level with those at the national level to ensure that tourism development and growth is conflict free. Furthermore, there is need for a well-coordinated and managed approach to manage the various institutions and measures put in place to enhance the capacity of such institutions to deliver on their respective mandates.

The foregoing issues are in line with the findings from the country-wide surveys. Results from these surveys were clear that the country's tourism policy is faced by a number of drawbacks that limit its level of implementation. For instance, it was highlighted that the policy lacks clear guidelines and a programme for its implementation including a clear link between the federal level and the regional states, relevant cross-sectoral linkages and no guideline on land use plan. Further, it was observed that there is a general paucity of the policy awareness at the grassroots level and the lack of qualified manpower to interpret and implement the policy both at the federal level and the regional level. Concern was also raised on responsibility and authority overlaps between the federal level and the regional states, and between one regional authority and another.

2.13 Tourism Research and Development

Evidence has demonstrated that research plays an important role in tourism development. This is the case in virtually all aspects of destination development including: informing policy formulation, guiding investment, addressing issues relating to sustainability and consequently enhance the destination's competitiveness. In particular, research plays an important role in the development of innovative tourism products, identifying new and future emerging market trends, and also identifying current and future issues that could impact tourism development. In addition, research could enable an understanding of tourist expenditure, various impacts of tourism development including economic, social-cultural and environmental, and facilitate the establishment of tourism monitoring and evaluation indicators. In this regard, the institutionalisation of tourism research and development frameworks is critical within any competitive tourism destination.

In the case of Ethiopia, unlike in other traditional economic sectors such as agriculture where there has been significant investment in research to inform the development of the sector, the role of research in the development of the country's tourism sector has not been hitherto developed. Currently, tourism research, mainly in the form of a compilation of tourism statistics is carried out by the MoCT which releases the *Tourism Statistics Bulletin* providing information on tourist arrivals, tourism receipts, accommodation (number of hotels and rooms) and tourism suppliers (tour operators and travel agents). This tool lacks important data related to tourism employment, investments, regional tourism efforts, tour operators' activities, and demand for tourism product, such as Cultural Heritage Sites and Protected Areas. In addition, there are a number of universities that conduct tourism research activities. However, every institution is conducting this research, not based on the gaps and the required need assessment, but without any communication and consultation with each other.

Consequently, it is not readily clear what informs tourism development in the country save for ad hoc studies on national tourism development issues from time to time. However, given that these are not conducted on a regular basis, it is difficult to make sound decisions because the tourism environment is ever changing. A well-functioning national tourism statistics system is thus an essential instrument for informed tourism policy planning and implementation. Further, a strong and valid national tourism statistics system will form the basis for future Tourism Satellite Account (TSA) efforts. Thankfully, the MoCT is taking steps to ensure the coordination of research activities and working on establishing a National Tourism Income Accounts (TSA) to depict the contribution of the tourism industry in the national income account system. More so, a strong and valid national tourism statistics system will

form the basis for future Tourism Satellite Account (TSA) efforts. In this sense, progress has been made and a new IT platform to support the national tourism statistic has been developed together with improvement in the methodology, including systematic visitor surveys.

It suffices to say that tourism can be developed anywhere in the country, even where there are no natural nor cultural resources. Nonetheless, research will be crucial in informing the innovative approaches to developing such areas as tourism destinations. Given the importance of tourism in the country and the role research plays in the development of the sector, there is need for institutionalisation of tourism research in a collaborative and multi-stakeholder driven national framework whose key functions will be to inform strategic direction and formulation of policies to address the sustainability issues as well as enhancing the country's competitiveness.

2.14 Tourism Development Financing

Adequate financing has been identified as one of the biggest hindrance for effective development of the tourism industry particularly in the developing countries. In spite of its potential for contribution to social and economic development, tourism paradoxically continues to receive little financial support from either states, donors or the private sector. They, consequently, rarely consider it as a priority intervention sector.

In the Ethiopian context, there is need to establish a financing mechanism other than the government regular budgeting dedicated to tourism development. This is because the financial resources are required for sustainable tourism development including training, product development, and destination marketing and promotion, et cetera. Currently, the tourism sector in the country lacks a formalised framework for funding its development activities. The main funding comes from the national budgetary appropriation and uncoordinated donor and bilateral support. As a result key areas essential to the sector's growth have not received adequate financial support both from the government and private sector alike.

- Human resource development, for example, for the hospitality sector, has not received sufficient attention from the private community across the country. As a result, there is an extremely high rate of labour turnover within the sector. The employers opt to 'head-hunt' and to 'poach' employers from each other's companies instead of investing in employee development. Establishing a common pool of funding for human resource development would remove the burden for the basic human resource development from individual employers and enable them to access opportunities for Continuous Professional Development of their employees.
- In addition, essentials aspects of tourism development such as basic tourism infrastructure like access, power, ICT, water supply, and other public services as well as other unforeseen expenses to meet the challenge of negative tourism impacts as well as unexpected eventualities are currently inadequately financed.
- Further, there is an absence of the tradition of proper reinvestment in conservation and management of the natural and cultural attractions from revenue generated from the tourism industry in general and from entrance fees collected at cultural and natural attractions in particular.
- Moreover, the country lacks a concise framework for public-private partnership in financing important tourism activities such as marketing.

It is imperative to make firm financial arrangements to support the present effort of the government as projected in line with the tourism transformation plan of Ethiopia. Such financing mechanism will also avoid waste of resources on one hand and duplication of efforts to effectively utilise and handle the international donor support on the other hand.



The jabena is a traditional vessel for brewing Ethiopian coffee. Preparation of coffee in a jabena is a cultrual practice that dates back to several generations.

PHOTO: Brewing coffee in a jabena over coal.

2.15 Summary of Ethiopia's Tourism Sector SWOT Analysis

KEY STRENGTHS	KEY WEAKNESSES
TOURISM RESOURCES AND ATTRACTIONS	
o The presence of a mixture of unique natural, cultural and historical tourism resources o The presence of highest number of UNESCO World Heritage Sites in Africa o Ethiopia as a cradle of humankind o Colourful cultural festivals, events and celebrations with diverse traditional music and dancing styles o Amazing landscapes and natural setting with big contrast from the Siemen Mountains as roof of Africa to the Danakil depression below sea level o Rich and diverse resources for avitourism activities endowed with many endemic and globally threatened species (861 bird species with 18 endemics) o Diverse water bodies of lakes and rivers with the Great East Africa Rift as significant landscape feature o Ethiopia as the world capital of great runners o Rich traditional artisanal crafts products o Unique and rich culinary tradition for developing gourmet tourism o Pluralism and diversity of cultural wealth and unique religious coexistence, mutual respect and cultural cohesions	o Poor management of both natural, cultural and historical attraction o No special attentions for UNESCO World Heritage Sites in terms of site based management and destination management organisation o Lack of resource mapping evaluation and conservation strategy for both natural and cultural resources o Poor and uneven distribution of tourists services and facilities and services for visitors (toilets, shop, drinks, resting areas et cetera) o Poor signage and interpretation works o Undiversified sources of financing o Limitation in qualified trained manpower o Lack of coordination, networking, collaboration and partnership among stakeholders in planning and implementation o Lack of workable regulation regarding revenue generated from the tourism industry o Lack of awareness and lack of involvement of communities in the protection of valuable resources/attractions. o Lack of clear priorities in terms of tourism areas to guide public investments and poor coordination among federal, regional tourism and municipal efforts/roles o Lack of integrated tourism development plans by key destinations/ routes (beyond regional/local boundaries)
TOURISM MARKETING AND PROMOTION	
o New institutional rearrangement for marketing Ethiopia as a top tourist destination o New marketing strategy and branding activities are in progress o Good image in Africa- Ethiopia's long standing involvement in regional and continental affairs that has created a positive image of the country within the continent o Ethiopia is increasingly in the international travel spotlight and has appeared in lists of top travel destinations in recent years o Number of arrivals shows an increasing trend o Presence of a large number of international missions in Addis Ababa including the headquarters for AU and UNECA	o Lack of marketing strategy o Lack of recognised national, regional, destination and specific product packages branding o Greater focus on traditional promotion channels and absence of official online marketing o Lack of marketing representation in key tourist generating countries o Lack of coordination in providing tourism information by Ethiopian Embassies (both online and offline) o Weak involvement of the national tour operators in the international channels in source markets in terms of handling tour and travel marketing with international tour operators o Over-emphasis on traditional markets e.g. Europe and USA o Lack of attention for regional and domestic markets o Limited capacity among inbound tour operators in terms of knowledge and skill o Poor marketing segmentation and market mix o Lack of concerted efforts and coordination in tourism marketing o Insufficient tourist information centres distribution

TOURISM FACILITIES AND SERVICES	
o Free market economic policy o Government attention towards tourism development with special emphasis to tourism services and facilities o A large, relatively wealthy and patriotic Diaspora is investing in Ethiopia o Increasing number of investments in tourism services o Private sector organised in associations o Increased number of city hotels, lodges and resorts o Incentive framework for tourism investment o The classification of hotels will be implemented shortly	o Lack of clear official standard for all types of tourism accommodation and implementation o More focused on hotels investments and less attention for other services and facilities like boating, rafting, ballooning equipment, tented camps o Concentration of hotel investments in Addis Ababa and regional capitals o Lack of awareness regarding the tourism services and facilities o Lack of proactive tourism investment promotion o Crafts for sale lack innovation and new designs. Poor product quality due to low skills and/or lack of knowledge about tourist expectations; lack spaces to market crafts
HUMAN RESOURCES DEVELOPMENT	
o Strong commitment of the leadership in the transforming of the tourism industry o The government policy in the expansion of TVET training institutions and centre of excellences to bring about competency in the tourism industry o Catering and Tourism Training Centre (CTTC) under MoCT to be a centre of excellence for tourism industry o Well organised system for the certification of competencies (TVET level) including the possibility of recognition of on-the-job training o Several universities countrywide offering tourism management studies o Starting Linkage between MoCT and higher education institutions in human resources development	o Lack of trained manpower, both quantity and quality, at all levels and across the sector o Weak planning in producing trained manpower in accordance to the need of the industry o Many training centres have limited human and material resources o Limited capacity of CTTC to meet the demand of the industry o Lack of formal mechanism to connect job seekers and tourism companies o Lack of awareness by investors/owners/managers of tourism service companies about the importance of trained manpower o Absence of professionalism and shortage of highly qualified personnel especially in destination management, development, natural and cultural heritage management
TOURIST SAFETY AND SECURITY	
o A globally recognised safety record o Peace and Political stability o Relatively secured environment vis-a-vis the regional neighbours o Strong commitment of the Ethiopian people against terrorism	o Petty crimes o Lack of emergency rescue services o Lack of consideration for the needs of the tourism sector while drawing up health sector planning and policies o Relatively high incidents of road accidents o Poor law-enforcement practices in the wildlife protected areas
TOURIST SUPPORT SYSTEM AND INFRASTRUCTURE	
o Efficient and effective international air connectivity for long haul tourism travellers o Bole International Airport is an air hub for Africa o Increased number of domestic airports and flights o Improved road network and further investments planned including railway connections o Increased ATMs and electronic payment systems o Relative expansion of ICT, electricity, water supply	o No proper signage indicating direction and distances, also lack of proper rest areas and view points along the highway o Limited ATMs and cash transfer services o Low ICT penetration o Lack of access roads in and around destination areas

POLICY, REGULATION AND INSTITUTIONAL FRAMEWORK	
o The presence of tourism development policy and policy implementation frame work o The GTP and sector development strategy o Destination development plan for the south and eastern parts of the country o Standardisation and quality grading of hospitality industry o Government support and prioritisation of the sector o Newly established Tourism Transformation Council chaired by the Prime Minister; Tourism Board and Tourism Organisation o Active involvement of the regional states in tourism development	o Lack of a national tourism marketing strategy and destination development strategy o Lack of legal framework for regulated tourism services (accommodation, tour operators) o No new tourism activities regulation like ballooning, rafting, paragliding, trekking etc. o Poor enforcement of existing regulations
TOURISM DEVELOPMENT FINANCING	
o Relatively fair allocation of government budget for tourism development activities in general o High and favourable focus from global development agencies and investors o Increased number of development projects with financial support from international partners, both bilateral and multilaterals o Proper utilisation of government budget and financial support of donors	o Absence of extra financing mechanism o Still very limited international donor support for the development of the industry compared to other sectors

KEY OPPORTUNITIES	KEY THREATS
o Infrastructure development initiatives to connect destinations in the country as well as East African regions with roads, railway and air flight o Enabling environment in terms of the enhancement of free market economy and fast economic growth of the country o Growing interest to market Ethiopia by the new and emerging countries of the Far East, Latin America and African sub regions o Addis Ababa as one of the world capital of diplomatic hubs to promote MICE tourism activities o Sub-regional initiative and measures taken by IGAD towards creating common market in general and tourism development integration o Growing positive image of the country by the international community	o Political instability, terrorism activities and other negative tourism implications in the neighbouring countries o Global economic environment, like financial crises of the world and fluctuating energy prices o Global tourism competition o Adverse travel advisories among main tourism generating countries o Negative global environmental conditions and climate change



Ethiopia is home to the headquarters of the African Union (AU) and the United Nations Economic Commission for Africa (UNECA).

PHOTO: The African Union headquarters in Addis Ababa.



3 VISION, MISSION, AND SHARED VALUES

3.1 The Vision and Mission for Ethiopia's Tourism Industry

Based on the foregoing situational analysis of Ethiopia's tourism industry, the question of where the industry should be in the next ten years had to be addressed. This called for efforts to establish a consensus on what Ethiopia's tourism industry stakeholders perceived the country's tourism would be like in the next ten years. This was key to establishing a shared vision, mission and values for the country's tourism development. High-level goals were then developed whose accomplishment would mean that Ethiopia's tourism would achieve its mission. These were developed during a series of meetings with the country's tourism industry stakeholder groups. Key themes that emerged in the discussions were that tourism development in Ethiopia should ensure that the country emerges as one of the top five destinations in Africa; should ensure that the host community participated and benefited from the industry growth; and should respect and uphold the country's rich cultural and natural heritage.

The Vision for the country's tourism is:

> "Ethiopia will become one of the top five tourist destinations in Africa by 2025"

The Mission is to:

> "Develop Ethiopia's tourism to maximise its contribution to the country's economic development, preserving her rich cultural and natural heritage, and providing the warmest of hospitality, excellent value for money and memorable, authentic experiences to every visitor."

3.2 The Shared Values

As noted above, throughout the stakeholder discussions, it emerged that the community should participate in the tourism industry and that it should also benefit from it. It also emerged that the development of this industry should respect and uphold the country's rich cultural and natural heritage. The values statement is to build the tourism industry as a force for host community economic empowerment through actively participating in its development; and one that engenders the preservation of Ethiopia's unique cultural and natural heritage.

Shared Values in the development of Ethiopia's tourism

1

Community participation and empowerment

Necessary mechanisms will be pursued to ensure the participation of the host community in the country's tourism development and that they are empowered to do so including skills training, access to funding and market, and policies formulated to ensure integration into the mainstream tourism industry value chain.

2

Respect and preservation of Ethiopia's cultural and natural heritage

Measures will be taken to ensure that the tourism development respects and upholds the country's rich cultural heritage and embrace safeguards and procedures to facilitate sound environmental practices.

3

Gender mainstreaming

All tourism policies and development planning will seek to ensure that men and women will have equal access to economic opportunities, skills training, employment, resources and decision making

4

Stakeholder partnerships

Efforts will be undertaken to guarantee that partnerships between the public and private sectors, development partners, and civil society will be encouraged in an effort to build synergies at all levels of tourism development.

5

Recognition of the devolved system of government

Ethiopia's tourism development will always recognise and respect the devolved system of government in place in the Federal Democratic Republic of Ethiopia. Mechanisms to enhance cooperation between the two levels will be pursued to ensure integration and consistency in tourism sector development in the country

PHOTO: Obelisk in the Aksum Kingdom, Ethiopia.



Timket is the Ethiopian Orthodox Church celebration of the Epiphany.

PHOTO: Timket celebrations in 2014.



4. STRATEGIES AND ACTIONS

4.1 Introduction

The National Tourism Policy, among others, advocates for the integration of tourism development into the key development policies and strategies of the country owing to its cross-sectoral nature and its ability to create strong economic linkages with other major economic sectors. The tourism sector is recognised as such in the Growth and Transformation Plan (2010-2015) whose overall agenda is to maintain the high and broad-based economic growth that the country has experienced over the past few years. The Growth and Transformation Plan, as is with the case of the National Tourism Policy, further emphasises an integrative developmental approach with such sectors as infrastructure playing a key role in the development of the key economic sectors including tourism.

Building on the key tenets of the National Tourism Policy, the Wildlife Conservation Policy, the Growth and Transformation Plan, and the IGAD STMP, this STMP seeks to enhance the synchronisation of ongoing tourism-specific sectorial policies and strategies within the broader national development framework informed by the Growth and Transformation Plan.

It is anticipated that through well-coordinated national tourism planning and development, the country will emerge into a competitive and sustainable destination. In line with this, a number of strategic intervention areas emanating from the prevailing tourism situational analysis, the broad strategies identified in both the National Tourism Policy and the Growth and Transformation Plan are therefore, necessary to ensure national competitiveness and which would serve as key frameworks for sustainable and long term tourism growth and development. These strategies are grouped under ten thematic areas.

It is important to note that while these strategic programmes are discussed as independent, the overall tourism development calls for an integrated approach encompassing all the ten thematic areas.

Further, the STMP Strategies and Actions are founded upon a number of fundamental principles which will apply to all strategic programmes and initiatives. These are indicated below.

(a) Sustainability

The dimensions or 'pillars' of sustainable tourism development envisioned in this STMP are:

Economic Sustainability and Equity

Ensure viable, long-term economic operations, providing socio-economic benefits to all stakeholders that are fairly distributed, including stable employment and income-earning opportunities and social services to host communities, and contributing to poverty alleviation.

Environmental Health

Make optimal use of environmental resources that constitute a key element in tourism development, maintaining essential ecological processes and helping to conserve natural heritage and biodiversity.

Respect for the Social-cultural Authenticity of Host Communities

Conserve their built and living cultural heritage and traditional values, and contribute to inter-cultural understanding and tolerance. While an integral component of the sustainability criteria and guidelines, special emphasis will be placed upon this given Ethiopia's rich natural, cultural and archaeological diversity and its strategic importance to the development of the national and regional tourism sector.

Stakeholder Engagement

Pursuit of informed participation of all relevant stakeholders, as well as strong political leadership to ensure wide participation and consensus building. Achieving sustainable tourism is a continuous process and it will require constant monitoring of impacts, introducing the necessary preventive and/or corrective measures whenever necessary. Both the principles of sustainable development and the underlying integrated approach of the GTP require close and organised engagement of all stakeholders at a national, regional and local level and between the public and private sectors.

Tourist Satisfaction

Maintain a high level of tourist satisfaction and ensure a meaningful experience to the tourists, raising their awareness about sustainability issues and promoting sustainable tourism practices amongst them. These internationally recognised principles expounded by the UNWTO will be applied consistently and rigorously in all actions and tasks associated with the implementation of the STMP.

(b) Integrated Destination Development

Ethiopia possesses a remarkable range of existing and potential tourism products and assets. To realise their market and economic potential, these require to be developed in a holistic fashion to create a total, compelling visitor experience. This, in turn, requires detailed and comprehensive destination planning covering all relevant elements including:

- Access to, in and between destinations of specific products
- Development of complementary activities and attractions
- Visitor services and facilities such as accommodation, refreshment, retail, interpretation, and so on
- Public services such as water/sewerage, electricity, ICT
- Creation of a safe and secure environment

(c) Prioritisation of Destinations

The range and diversity of the nation's potential combined with real challenges involved in its realisation requires that development initiatives be prioritised, organised and carefully focused over the 10 year time frame of the STMP. Existing and potential destinations and products will be identified, analysed, aligned and evaluated in terms of market and economic impact and priority destinations identified for integrated development.

1 Policy, Regulation and Institutional Framework

2 Tourism Product Development

3 Tourism Marketing, Branding and Promotion

4 Investment in Tourism Facilities and Services

5 Human Resource Development



Lake Kuriftu is a crater lake and it is located south west of Addis Ababa. It has now become one of the country's best known resort centres.

PHOTO: Nightfall over Lake Kuriftu, Ethiopia.

6
Tourism Support Infrastructure and Services

7
Tourist Safety and Security

8
Tourism Research and Development

9
Conservation and Preservation of Natural and Cultural Resource

10
Tourism Development Financing



4.2 Pillar One: Policy, Regulation and Institutional Framework

4.2.1 Introduction

The prevailing policy, regulatory and institutional framework is critical in establishing a conducive environment through which the competitiveness of a destination could be achieved and in so doing enhance tourism growth and development. Such an environment could, for example, lead to higher visitor numbers, promote investment, innovation, human resource development and research and development. To achieve this, new arrangements may be required and where necessary and appropriate, existing institutions strengthened in order to realise the goals for tourism development in the country. This will entail close cooperation and detailed consultation between the federal government and regional governments, plus between public, private and civil society institutions, including clearly defined roles and responsibilities. This programme area's focus will be to:

(a) Establish a legal framework for formulation and implementation of tourism policies and regulations
(b) Strengthen and harmonise public sector institutions
(c) Strengthen private sector institutions
(d) Strengthen public private collaboration
(e) Strengthen linkages with other sectors

4.2.2 Strategies and Actions

A. Objective: Establish a framework for formulation and implementation of tourism policies and regulations

Formulate a legal framework to guide the development of the tourism sector

In order to guide, regulate and enforce the strategic initiatives geared towards the development of the country's tourism sector, a legal framework in the form of a Tourist Act will be enacted. This legal tool will identify the different actors and their mandate within the tourism sector and create an enforcement mechanism to ensure the implementations of strategic programmes essential for the competitive and sustainable development of the tourism sector. A number of successful destinations have seen this need including Kenya, South Africa, Australia, among others.

B. Objective: Strengthen and harmonise public sector institutions

Enhance the institutional capacity of the Tourism Transformation Council to spearhead tourism growth and development

The appropriate institutional framework within the Tourism Transformation Council (TTC) will be necessary to oversee the implementation of both the tourism policy and this STMP. Such a framework should seek to facilitate institutional linkages, communication, strategic partnerships and alignment of tourism stakeholders in the country. To facilitate the work of the TTC, a number of committees or working groups comprising relevant stakeholders should be established including: the tourism product development committee; marketing committee; quality and standards committee; human resource development committee; tourist safety and security committee; research and development committee; and immigration committee.

Strengthen the capacity of regional tourism institutions and that of other relevant institutions to deliver on their respective mandates

In order to ensure that tourism is developed in a well-coordinated manner throughout the country, it is essential that the capacity of the various institutions, particularly those at the regional

level, the private sector, and civil society, is enhanced. This should be done with a view to ensuring that such institutions are able to deliver on their respective mandates. Mechanisms shall be put in place to achieve this including, enhancing human resource capacity, benchmark study tours, seminars and workshops, among others.

Harmonise regional tourism development plans with those at national level

The national tourism development plan comprises the sum of regional plans. The maximisation of its potential and the generation of synergic benefits require the coordination of tourism policy and planning between regions themselves and with that at the national level. This process should be a consultative one taking into consideration the views of tourism stakeholders within the regions so as to minimise conflicts that may arise during tourism development and to enhance regional ownership and sustainability of tourism development in the country.

Harmonise the role and functions of national tourism institutions

There are clear linkages between institutions under MoCT in charge of management of national assets and institutions charged with the development and promotion of tourism products such as ETO. Common interests will be identified by the respective institutions and a framework will be established to ensure close collaboration.

Review and update tourism related policy, regulations and legislation

Enabling policies, regulations and legislations are necessary to provide a stable, supportive environment in which the tourism sector can grow and prosper. To address the dynamism of tourism markets, the product mix and the growth of the sector, it will be necessary to review and update the policy, regulatory and legislative environment periodically to ensure it reflects these changes.

Mainstream tourism development into the broad economic development policies within the other sectors

This would involve the integration of tourism development policies within other sectors to enhance economic linkages. Tourism is, by nature, interlinked with the other economic sectors both in terms of backward linkages and forward linkages. Ensuring that tourism development policies are aligned with and intertwined within those of other economic sectors would not only ensure a strong foundation for the sector, but also would optimise the sectors indirect and induced economic contribution. This would, however, require studies to be undertaken to determine the nature and level of the possible linkages.

C. Objective: Strengthen private sector institutions

Establishment and strengthening existing private companies and trade associations

The private companies and trade associations including accommodation providers, tour operators, travel agents, tour guides, restaurants and tourist taxis are the principal means by which tourism revenue is generated. It is currently fragmented, with a few exceptions. This weakens its ability to contribute to national and regional policy and to engage in collaborative activities jointly. Therefore, existing private companies and trade associations should be strengthened to play their role in the development of the sector.

D. Objective: Strengthen public-private collaboration

Establishment of destination management organisations in major tourist areas

Destination management organisations (DMOs) play an important role in bringing together all public and private sector stakeholders and the community within destinations as a mechanism to create and implement local initiatives, manage the destination as an integrated entity and provide the destination with a strong voice at the regional and national level. Therefore, it is important to establish such organisations in priority areas.

Establish and strengthen regional Tourism Transformation Councils (TTCs)

TTCs provide a high level forum for decision makers in the public and private sectors to consider and influence the development of the sector regionally in a collaborative environment with a progressive focus. Such a framework should seek to facilitate institutional linkages, communication, strategic partnerships and alignment of tourism stakeholders in the country. To facilitate the works of the TTCs, a number of working groups comprising relevant stakeholders should be established including: tourism product development, marketing and promotion, quality and standards, human resource development, tourist safety and security, and tourism research.

E. Objective: Strengthen linkages with other sectors

Synchronise Tourism Development policies with those of other sectors

To ensure integration of tourism development policy within the GTP, its implications on and interrelationships with other sectorial polices will be identified, defined and a coordination framework established.

Review and align entry visa requirements and procedures with tourism development strategy

Obtaining an entry visa is, for most visitors, their first experience of Ethiopia and must create an impression of the country as a welcoming and efficiently run nation. While matters of national security take precedence, the process for business and leisure tourism requires simplifying and upgrading operationally and technologically. Possible strategies will include:

a) Visas on arrival for all visitors coming from target source. Under the framework of AU's *Agenda 2063*, specific preference will be given to African countries

b) Waive visa requirements for major source markets and "low risk" security countries

c) Simplify business visa requirements for major source markets and "low risk" security countries

d) Enable tour operators to pre-arrange visas

e) Adoption of Electronic Travel Authority (ETA) programme (an electronically-stored travel authorisation for travel linked to the traveller's passport)

f) Adopt common visa schemes within African Regional Economic Communities (RECs). Of particular relevance are the ongoing negotiations for an East African Single Tourist Visa among the members of the East African Community (EAC) (the single visa is already in place between Rwanda, Kenya and Uganda). The proposed Single Tourist Visa for the IGAD region presents a quick win for Ethiopia and should be further pursued in the interest of the country. This will not only boost visitor numbers from the African region, but also tap into the international visitor markets by creating an avenue for them to combine a visit to Ethiopia with other neighbouring countries

g) Other considerations will include:
   - Visa free travel for visitors travelling in groups
   - Visa free travel during specific months of the year
   - Visa free entry for select countries and for specific lengths of stay
   - Visa waiver programme for a particular region/destination within the country
   - Multiple-entry visas to selected countries

Review and align aviation sector policies with tourism development strategy

Air transportation is an essential element of tourism, providing the vital link between the tourist generating areas and destinations. In order to boost visitor numbers and establish the country as a competitive tourist destination, there is need, therefore, to mainstream tourism development strategy with the country's air transportation policies particularly pertaining to target source

markets. Specific attention will be paid to the African countries under the framework of the *Yamoussoukro Decision* [6] and the *Luanda Declaration on Tourism and Air Transport Connectivity* [7]. This is aimed at ensuring that the country exploits the growing opportunities that the region presents for the tourism and aviation sectors.

Review and align banking regulations with tourism development strategy

For tourists, the ability to use standard credit cards and cash cards securely in destinations and facilities is essential. For tourism businesses, the ability to make investments and carry out financial transactions with suppliers and customers smoothly and efficiently is an important factor in terms of operational effectiveness, profitability and encouragement to grow and expand. Therefore, it is crucial to review and align banking regulations with tourism development strategy.

Review and align investment policy with tourism development strategy

The implementation of the STMP objectives will require considerable new investment by both domestic and FDI investors. Investment policies and procedures will be reviewed to identify and resolve unnecessary barriers.

Review and align land use and urban policy with tourism development strategy

Sustainable development planning requires both proper zoning of land within destinations for tourism activities and the identification of development sites. Current land use policies will be reviewed to identify and resolve policy and procedural barriers.

Develop policies to maximise tourism value chain benefits

To ensure that the economic benefits trickle down into the economy, reduce leakages and increase linkages with the other sectors of the economy noted above, it is imperative that a value-chain approach be adopted in the development of the country's tourism sector. The tourism value chain (TVC) describes the full range of activities required to bring the tourism product through the different phases of production in response to consumer demand. Two main steps will be necessary in this:

- Carry out Tourism Value Chain Mapping (TVCM) in order to investigate the structure and working of the tourism value chain in the destination and the economic value generated; and
- Plan and execute actions to enhance the local economic impact of tourism.

Noting the socio-economic empowerment focus of Ethiopia's tourism development, specific attention will be paid to analysing the amount of income from all transactions in the tourism sector that is received by the local economy, and to identify which particular kinds of transactions are most pro-poor or have the potential to be made more pro-poor.

4.2.3 Framework for the Strategic Pillar

To effectively address the above strategies and actions, leadership will be required from the Tourism Transformation Council. Other agencies to be involved in this will include MoCT, the Ethiopia Investment Commission, Ministry of Agriculture, and the regional governments.

---

[6] Ethiopia is a signatory to the 1999 Yamoussoukro Decision that committed African countries to deregulate air services and promote regional air markets open to transnational competition.

[7] The *Luanda Declaration on Tourism and Air Transport Connectivity* was issued jointly by the UNWTO and ICAO in Luanda, Angola on 29th April 2014 under the framework of the 56th Regional Commission Meeting for Africa. It spells out the region's commitment to addressing the critical issues related to bridging air transport and tourism policies, including the current regulatory framework and taxation.

4.3 Pillar Two: Tourism Product Development

4.3.1 Introduction

Product development entails the development of new products and/or revitalisation of existing ones. Tourism product development is key to enhancing any given destination's competitiveness. Product development consists of enhancing the physical, experiential and emotional elements of a place that contribute to the overall destination's experience and should ideally be consultative taking into consideration views and aspirations of key stakeholders, including the public, private sectors, civil society and academia. The tourism product is an amalgamation of five major components i.e. attractions (natural, cultural – manmade attractions primarily for tourism or manmade attractions originally not meant for tourism, for instance, the rock hewn churches of Lalibela and the traditional and contemporary culture, etc.), facilities at the destination, accessibility of the destination (including routes or trails etc.), the image of the destination and the price to the consumer.

The product development process is the moulding of such assets to meet the needs of customers. Strategies under this programme shall focus on sustaining or enhancing the quality of the existing tourist products and the development of new products to enhance the scope of visitor experience in the country. This Pillar will adopt a mixed product development approach, integrating both *product-oriented* and *market-oriented* approaches. The product-based approach allows destinations to develop innovative products and then present them to the market, while the market-oriented one allows benchmarking on the best practices from existing product development strategies and initiatives.

4.3.2 Actions

The focus of this priority area is mainly on three key outcomes:

- Enhancing the appeal of the country's existing tourism products
- Expanding and diversifying the country's tourism product
- Creating a framework for realising a sustainable tourism product development

To achieve this, the following specific actions will be pursued

A. Objective: Enhance the appeal of the country's existing tourism products

Profile the quality and standard of existing tourism products

In order to increase the competitiveness of the tourism industry, the starting point will be to evaluate the scope and diversity of existing tourism resources throughout the country. By identifying existing attractions, the country and the individual regions will acquire the necessary capacity to identify the necessary value addition required for each product.

Enhance the appeal of tourist product in the priority areas to increase visitor numbers and length of stay

It is imperative that the tourism product in the priority areas be enhanced, as is the case in most of the tourist towns/cities of the north. The prevailing tourism assets will also need to be improved with a view to increasing visitor numbers and their length of stay. The objective is to enhance the travel experience and ensure competitive tourism development. This will entail an integrated approach in terms of developing appropriate tourism infrastructure, increasing the range of both primary and secondary tourist activities/attractions, provision of physical infrastructure such as access roads, water transport facilities et cetera.

Destination enhancement will include activities such as:

i) Developing new activities for tourists aimed at diversifying the tourism product that need little or no physical investment, and creating opportunities for jobs and income for local people (for example, side excursions/visits from main destinations, hands-on workshops, crafts demonstrations and so on).

ii) Ensuring the protection of valuable natural and cultural resources (regulate access to the most sensitive areas, organise cleaning campaigns and proper waste management).

iii) Establishing regulations and guidelines for a safe, ethical and sustainable operation of tourism services by private companies (create awareness, agreements with operators and tourism service suppliers regarding business/behaviour codes, provide training and establish special permits).

iv) Investing in small tourism support infrastructures (for example, trails, bird watching hides, observation decks, craft markets et cetera).

v) Maximising the benefits of tourism for the local communities (promote the provision of services by local people directly or through partnerships and alliances with investors and tourism professionals, organise awareness campaigns and provide training, create special funds to benefit the communities at large and so on).

vi) Identifying investments and other activities.

Priorities should be agreed with the regional governments and other stakeholders but with consideration towards:

i) The most visited destinations on the Northern Route.

ii) Destinations on the Southern Circuit; highly sensitive from a social and environmental perspective.

iii) Destinations with high potential already suffering the effects of unplanned growth such as Afar (Danakil Depression and Erta Ale).

iv) Top tourism resources requiring integrated planning such as the shores of Lake Tana.

v) Addis Ababa, as the main gate to Ethiopia for most visitors, and as a MICE destination.

Among others, specific products requiring enhancement include

a) The UNESCO World Heritage Sites
Facilitating the management and development of sustainable tourism by fostering awareness, capacity and balanced participation of all stakeholders is vital.

b) The natural and cultural heritage assets
Specific attention will be paid to tourism development in these areas to ensure their conservation and protection.

c) Promotion of cultural events and festivals
Their promotion to tourist markets requires careful planning to avoid compromising their national and regional cultural significance and authenticity.

d) Development of activity based and special interest tourism
There are many special interest tourists in niche segments such as bird watching, angling, trekking, desert and volcano expedition, white water rafting, caving and rock climbing.

e) Expansion of MICE segment
Growth in this segment will be based on ensuring international competitiveness of conference and exhibition facilities, support services and dedicated national and regional marketing organisations.

B. Objective: Expand and diversify the country's tourism product

Increasingly, to remain competitive, destinations constantly have to re-define their tourism product offerings by creating new attractions that will compete in the global markets whose trends are constantly changing. For instance, countries in Europe are converting industrial parks into tourism attractions, while some of the newly industrialised countries have embarked on developing resort cities for tourism purposes. Closer home, Kenya, in its development blue print, seeks to develop five new resort cities as a strategy to diversify its tourism product offering; two of which are linked to the on-going LAPSSET infrastructure project. To diversify her tourism product portfolio, Ethiopia will pursue the following pathways.

Undertake product feasibility to determine the potential tourism products to develop in the country

A product feasibility study will be undertaken as a starting point in the development of new tourist products to determine the potential for different products in terms of market appeal and potential market niches.

Develop tourism products in regions not having high tourist activity

Given the fact that tourist activity is highly spatially concentrated in the country's capital and the northern parts of the country, it is crucial that tourism products are developed in those parts that have hitherto been left out in the tourism development plans. In addition, based on the fact that with the right concepts, tourism can be developed anywhere in the country, it will be important that even those parts of the country not rich in cultural or natural resources for tourism are also considered. Nonetheless, development of tourism products in such areas will require a profiling of the respective tourism potential together with the feasibility assessments and market intelligence.

Establish strategic tourism product development initiatives within protected areas

This will involve differentiating the wildlife-based product by identifying a number of protected areas as premium parks targeting the high tourist segment. Thankfully, the *Wildlife Tourism Marketing Strategy, 2013* identifies six premium parks[8] and thus provides a framework for the implementation of this initiative.

Prepare development plans and initiatives for the new products

Each new proposed product will require a development plan to ensure it is compatible with the destination development plan and, in the case of protected areas and heritage sites, with the site Management Plan. It must also demonstrate that it meets current and potential demand to the required scale and standard. Development plans will be prepared for flagship products and ongoing projects including the Great Ethiopian Renaissance Dam.

Develop niche tourism products to diversify the range of products

The development of niche tourism products such as eco, adventure, resort, culinary, health and sports, is central towards a diversification strategy and widening of both the product and market-base. The need to diversify the tourism products in the country cannot be overstated given the immense opportunities that exist. In this regard, a number of products are proposed:

a) Agri-tourism

Agri-tourism, either based on larger or small scale farms, entails the development of tourism products that revolve around the agricultural activities. The form of tourist participation may either be passive, where there are organised tours to the farms, or active where tourists participate, say, in the harvesting of tef.

[8] Bale Mountains and Simien Mountains National Parks in the highlands, Nechisar National Park, Senkelle Hartebeest Sanctuary and Chebera Churchura National Park in the Rift Valley, and Gambella National Park in the western lowlands. EWCA (2013), p71.

b) Village/rural tourism

Village/rural tourism is also similar to agri-tourism, especially when it is on small-holder farms, but is broader in the sense that it is not restricted to agricultural activities but rather all aspects of a people's daily life. Furthermore, such forms of tourism could also include accommodation, mainly homestays.

c) Gastro-tourism

Gastro-tourism is also referred to as *culinary tourism*. Gastro-tourism will entail among others, discovering, tasting, experiencing and understanding the culinary aspects of the Ethiopian.

d) Rail transport-based tourism products

Rail transport-based tourism product is in line with the proposed rail transport infrastructure development which is anticipated to pass through some of the most scenic routes (e.g. Makele-Woldiya Hara-Gebeya-Sumera-Dicheto-Elidar route) in the country and key cities, it is now timely to start conceptualising tourism products that could be developed in order to diversify the range of products. Given that these are not readily available in the African continent, these will provide strategic vantage point to tap into both the domestic and regional tourist markets.

e) Water-based tourism

Potential areas where cruise tourism could be developed include lakes Tana, Abaya, Awasa, Ziway, Langano, Shala and Chamo.

f) Sports tourism

Further to the above, this is an area that harbours great potential in the country.

- Owing to the numerous water bodies, water sports need to be developed including white water rafting where appropriate, water surfing in the lakes and even sport fishing.
- There is need to maximise on the country's marathon prowess, just like Kenya has done by marketing Iten in Rift Valley as a destination for high altitude training. In this regard training camps could be established at suitable locations and accompanying facilities provided. In addition, sporting facilities of international standards need to be developed to promote both domestic and regional tourism, and to enable the country to bid for the hosting of major sporting events, such as the Africa Cup of Nations. An initial target could be to ensure that each region in the country has such facilities in place within the next ten years.
- In addition, golf tourism offers great opportunity for the country to tap into the high-end tourist market, but this require the construction of golf clubs/resorts of international standards since there is only one such facility in the whole country.

It is important to note that at both federal and regional level, a product development committee is established which will be charged with guiding the development of niche products and developing market research on product innovation and development.

Further, it is advisable that in the endeavour to diversify the tourism products, emphasis should not just be on maximising the exploitation of resources so as to increase visitor numbers and tourist receipts, but also on helping realise the country's socio-economic development goals. As much as possible, such products should involve or seek to benefit the local communities, through e.g. benefit sharing schemes or increased employment opportunities.

Development of new flagship projects

The infrastructure development strategy as outlined in the GTP (2010-2015) provides opportunities for development of tourism "anchor" projects. The rationale behind these flagship projects arises from the need to meet the demand from the youthful and pleasure-seeking market that may not be primarily attracted by the cultural and wildlife products currently being the focus of Ethiopia's tourism. In addition, this forms a deliberate attempt to develop tourism in areas traditionally not considered as tourism hotspots.

These key tourism "anchor" projects will be developed following the cluster-based approaches such as Special Economic Zones (SEZs) that involves sector-specific and targeted regulatory interventions to tap investment opportunities and achieve development impact potential [9]. In addition, such flagship projects should be developed as primary attractions to tap into the domestic, regional and international markets and as a secondary goal, complement existing tourism potential wherever they will be located.

Examples of areas that may be considered for such projects include:

i) Southern part of the country to take advantage of the LAPSSET project and link with the existing tourism potential in the area in addition to targeting the Kenyan market.

ii) Northern part of the country midway between Mekele and Aksum- to diversify the product portfolio adding to the already developed heritage product and thus diversify the market and enhance the length of stay in the area.

iii) Gambela (Western part) to open up the region for tourism and take advantage of the regional market especially the Southern Sudan market.[10] The proposal is to develop a resort city in the buffer zone of Gambela National Park and allow no development of any tourist facilities within the park. This is a paradigm shift from the traditional practice of establishing tourist facilities within protected areas. This model will strengthen conservation, avoid enclave tourism, enhance economic linkages, and still guarantee wildlife tourism.

In pursuing this option, a *Resort City Development* Strategy should be formulated first. Such a strategy would clearly detail the resort city conceptualisation including unique selling propositions, how they would attract tourists, urban planning, investor promotion with accompanying relevant incentives, and financing models, among other considerations. It is further informative to note that such flagships will need a public-private partnership (PPP) approach for their success, whether full management contracts, leasehold or the BOT (Build–Operate–Transfer) type of arrangements. This will require the country to formulate a regulatory framework for PPP. [11]

C. Objective: Develop cross-border tourism products

Identify potential trans-boundary products

The existence and continuing development of access routes between neighbouring countries creates opportunities to develop trans-national products of appeal to respective domestic

---

[9] Examples of such flagship projects can be found in a number of successful destinations including the US with big names such as Las Vegas, Miami, Honolulu and the Greater Orlando Metropolitan where the Walt Disney Company has built its own city- a city resort within a metropolitan resort region.

[10] Gambela National Park currently enjoys donor support plus a development programme that includes roads, airstrips, HQ, and an eco-lodge. The park has been identified for development as a one of the six flagship (premium) parks in the EWCA's *Wildlife Tourism Marketing Strategy* see p.74.

[11] In this, Ethiopia can learn from such success stories including South Africa where a strong regulatory framework for PPPs has been developed to enable national and provincial institutions to enter into public-private partnerships e.g. the PPP Toolkit for Tourism in 2009.

markets and the international market. Destination development plans will consider the potential for alignment and synergy with regional products and markets.

Prepare development plans with respective partner countries

Potential trans-national products will require aligned development plans with the partner country. This will include preparing development plans for transnational attractions like Gambela National Park, Kafta Sheraro National Park and so on.

D. Objective: Create a framework for tourism product development

Given the importance of tourism products in enhancing the country's competitiveness, a tourism development framework needs to be put in place. Such a framework will be essential, particularly in the case of new product development, in providing strategic direction with a view to exploiting the opportunities that exist in the regions by building on their respective unique aspects. This will enhance their comparative competitive advantages whilst complementing the wider federal competitive image Furthermore, such a framework will be critical in guiding future tourism development and investment opportunities, which could further enhance the sector's contribution to GDP, and consequently, economic growth and development.

Establish national destination development strategy and plan

Destination development plans provide an integrated framework for tourism development and will be prepared in consultation with all key stakeholders. Key focus of such a plan would be:

i) Assessment of the potential for tourism development;

ii) Specific objectives for tourism development and the tourism model;

iii) Tourism zoning: Priority Tourism Areas (PTAs), nodes, tourism circuits and routes;

iv) Transport and basic infrastructure needed;

v) Leisure activities and product development;

vi) Accommodation and other facilities needed (aligned with the overall national tourism development objectives and model adopted).

Develop federal and regional tourism product development schemes

A tourism product development scheme, established as part of the broader tourism product development framework, would be key towards enhancing the development of the tourism product and in particular, the niche products. Such a scheme would provide a vital impetus for regional tourism product development in the country. The key roles of such a scheme would be to provide adequate financial incentives to stimulate investment, provision of education and training services to communities and national authorities with a view to promoting tourism entrepreneurship as well as setting quality standards on facility development and other related infrastructure in the country. Lessons can be learned from such schemes in Australia and India.[12]

Develop federal and regional tourism accreditation programmes

In the endeavour to enhance the quality and standards of the tourism products, it is imperative that accreditation programmes are established. This could be at the federal level, though, where appropriate, regional states could be encouraged to develop their own respective programmes. Nonetheless, such programmes need to be in line with the prevailing international best

[12] India's tourism product development scheme features five main schemes: Scheme for Organising Fair & Festival and Tourism related events (DPPH), Central Financial Assistance to Information Technology (IT), Scheme for Assistance for Large Revenue Generating Projects, Scheme of Rural Tourism, and a Scheme for support to Public Private Partnership in Infrastructure Development (Viability Gap undoing). Another successful scheme has been developed in Australia focusing mainly on improving the quality of accommodation and attractions in regional areas (see Australian Trade commission, Tourism Industry Regional Development Fund (TIRF) Grants Programme).

practice so as to ensure that tourism products are of corresponding standards. In this respect, National Tourism Accreditation Working Group would be key to developing guidelines and enforcing them to ensure that quality is enhanced. This should be done in line with the proposed accreditation programme of the IGAD STMP [13]. Further, through a certification scheme, visitors would be assured of the quality of tourism products given that service providers will have compliance certificates, marks of quality or brand recognition.

Develop sustainable tourism product development strategy

In order to ensure sustainable tourism development, it is essential that MoCT, in conjunction with the relevant regional government organs, coordinate and plan the product development carefully, as well as installing mechanisms to ensure that products are managed in a sound and viable way. For instance, development of nature-based tourism products will require a minimalistic approach to tourism development to ensure sustainability, hence, the need for sound understanding of carrying capacities. Likewise, conference tourism or mega events, pilgrimages, especially during such festivals as, *Enkutatash, Meskel, Gena, Timket* and *Fasika* for the Orthodox Christians and *Id Al Adha, Id Al Fitr* and *Maulid* for the Muslims, would require employment of sustainable mass tourism strategies.

Deliberate efforts, nonetheless, have to be put in place to minimise leakages of tourism revenue, such as encouraging the reinvestment of such revenue, building federal and regional capacity to run and manage facilities at levels ranging from operations to managerial. In addition, a conducive environment will also be necessary to boost domestic investment in the development of tourism products. It is imperative that whatever approach is preferred, the ultimate goal should be to address the national development priorities.

4.3.3 Framework for the priority area

Tourism product development takes place at various levels including the federal (here tourism product development, especially development of new ones should be based on the existing unique attributes), national and regional levels (as has been proposed in the IGAD STMP to develop the region

[13] See Sustainable Tourism Master Plan for the IGAD region 2013 – 2023, p. 83





The Tiglachin monument is a memorial to Ethiopian and Cuban soldiers involved in the Ogaden War of 1977. It is located on Churchill Avenue in Addis Ababa.

PHOTO: The Tiglachin Monument.

as a single destination). As already mentioned, this would entail a consultative process that amalgamates the views and aspirations of key stakeholders. Accordingly, the roles of respective stakeholders would need to be clearly defined. In this respect, this STMP adopts guidelines for the roles and responsibilities of key stakeholders as spelt out in the National Tourism Policy:

- The government organs include the federal, regional and local administrations which are charged with providing strategic direction and the establishment of conducive environment for tourism product development.
- On the other hand, the private sector or development investors would play a major role in the specific development of facilities such as hotels and provision of services such as transport, and where appropriate this will be done in collaboration with local communities.
- The academia, through research and development, would provide information that will facilitate the development of innovative tourism products.
- The civil society and the general public would help to ensure that tourism product development is sustainable and in line with the broader socio-economic development goals of the country.

Tourism product development will also adopt an integrative approach taking into consideration the broader national socio-economic development goals and taking advantage of the emerging opportunities as identified in the GTP. As such, while drawing benefits from such initiatives, tourism product development should also play a complementary role whereby proceeds from tourism are also channelled in the further development of such initiatives.

Finally, tourism product development will need to be aligned to the marketing strategies, investment (including capital), tourism specific infrastructure plans and sustainability considerations.

4.4 Pillar Three: Tourism Marketing, Branding and Promotion

4.4.1 Introduction

Strongly linked to product development, tourism marketing is an integral component of destination growth and development. While product development is associated with the creation of attractions or experiences, marketing plays a key role in communicating the value and appeal of the products to would-be consumers. Owing to the complex and multifaceted nature of destinations arising from the inter-relationships of key stakeholders, some of which may have negative impacts, marketing is also an essential tool for enhancing destination competitiveness. The main objective from the demand-side would be to increase visitor numbers, while from the supply-side, marketing would be instrumental in attracting investors to invest in a range of destination goods and services including accommodation, entertainment, retail and infrastructure, thereby further boosting tourism growth and development. This programme area focuses on strategic interventions to market the country as a tourism destination within the international markets, the African regional market, and the domestic market. It further focuses on widening the country's tourist market while developing the current markets.

The programme identifies strategies to achieve the following key outcomes:

a) To intensify the promotion of the country's tourism in the current target markets
b) To diversify the country's tourist market
c) To build a national brand that improves and entrenches the image of the country as a tourist destination
d) To disseminate and manage information about the destination
e) To establish institutional and strategic frameworks for marketing the country as a tourist destination

4.4.2 Actions

A. Objective: Deepen the country's appeal in the current target market segments

Market the country and its regions at relevant tourism trade fairs and exhibitions

Tourism trade fairs and other relevant exhibitions in various parts of the world are increasing becoming an important avenue through which to market the country and its regions to various intermediaries including tour operators, travel agents and even tourists themselves. Examples of such tourism trade fairs include, ITB in Germany, World Travel Market in the UK, Tourism Indaba in South Africa and the recently launched Karibu Tourism and Travel Fair in Arusha Tanzania, mainly for the East African market. In line with the coordinated approach to tourism marketing, a strategic approach will be necessary to ensure the effective participation of key stakeholders and that the regions are well represented. Importantly, however, is to ensure that the impact, say in terms of increase in visitor numbers and revenue or even investments, are clearly articulated. In addition, participation in such fairs needs to be guided by a clearly defined market segmentation plan that will provide guidance in terms of strengthening the country's position in the current markets and targeting new and emerging markets such as domestic and African tourist markets.

Market and promote the country as part of the wider IGAD tourism region

There is need to further align the country's national marketing strategies with that of the wider IGAD tourism region. There are benefits to such joint marketing ventures in the sense of achieving economies of scale and also giving the visitors a wide range of opportunities in terms of activities which could further serve to prolong the length of stay. Furthermore, given that the

tourist products are somewhat differentiated, the country stands to benefit in terms of tourist overflow from the mature destinations of the region.

Provide incentives for visitors to extend their stay during major conferences and events

The country, particularly, its capital Addis Ababa, is strategically positioned being the headquarters of both the AU, UNECA and several other international organisations. These organisations are known to host several major conferences throughout the year. However, the programmes of such events tend to be very rigid such that at the end of them there is no time for the large numbers of delegates, most of whom have allowances to spend, to experience what the country has to offer. This is usually due to the fact that such delegates are required to depart the country almost immediately after the events. To change this, it will require:

a) The provision of incentives to encourage such delegates to extend their stay post such events.

b) The provision of relevant information during the event and/or complimentary tours for delegates during such events to further publicise what the country has to offer.

c) Working closely with key organisation such as the AU and UNECA to better position the country as a destination for the delegates.

B. Objective: Diversify the country's tourist market

Expand the country's tourist market to new and emerging source markets in Eastern Europe, Africa and Asia

There is need to diversify market opportunities to tap into the new and emerging tourist markets. Diversification to non-traditional markets such as Brazil, Russia, India, and South Africa (BRICS) is essential to ensure a wider reach. The projected growth of the middle class in Africa provide opportunities for market diversification. It is, nevertheless, imperative to note that such concerted efforts should be accompanied by appropriate tourism product development. To enhance wider representation abroad, there is need to establish marketing offices in the new and emerging markets. Given that resources may be limited, it may be reasonable to utilise the country's foreign missions abroad and/or regional offices with the mandate to cover the emerging markets.

Develop a strategy to stimulate domestic tourism

The rapidly improving access and communications infrastructure, combined with the growing affluence of the population, present opportunities for domestic tourism. Nevertheless, domestic market demand differs from international demand in many areas such as that for short breaks, leisure resorts, MICE etc. It is also less seasonal and can provide a base level of business for primary and secondary destinations year round. As such, it requires to be addressed with a dedicated strategy. Within this strategy, special focus will be dedicated to creating awareness within the domestic market through national awareness programmes and campaigns aimed at both increasing the visitation habit of the general public as well as tourism trade to target the domestic tourism as a source of business mainly during off seasons.

C. Objective: Build a national brand that improves and entrenches the image of the country as a tourist destination

Develop and manage the country's destination brand image both at the national and regional levels

Given the complexity of branding, there is need to align the regional brands with the national brand to ensure that such brands do not come into conflict; rather complement the national brand. This will be critical in ensuring that the country's brand delivers its brand promise i.e. the values and personality, in an effective and consistent manner.

Use the power of ICT to create and manage destination perception and image

Owing to its global reach, ICT has the potential for creating and managing destination image through telling the destination story to the world and providing real time data about tourists' opinions about the destination. This may prove to be a strategy to counter any negative image or opinion that may affect destination perception.[14]

D. Objective: Disseminate and manage destination Information

Create and manage a national DMS

ICT-based destination management systems are today a source of competitive advantages for destinations world-wide. A national DMS will be crucial in providing in-depth information of what the country has to offer and should be comprehensive and encompass issues relating to product management, enquiry management services, visitor relations management, and facilitate bookings. The DMS should thus not be seen simply as a marketing tool, but more so as a tool for destination management.

Set up a network of Tourist Information Centres (TICs)

Tourist or Visitor Information Centres play an important role in a destination, particularly in regional areas, by providing information to visitors that encourages them to stay longer, spend more money, experience more attractions and revisit. TICs also create significant social benefits because they rely heavily on a volunteer workforce and operate as an important community facility. Further, it is imperative that TICs in different tourist regions function as a network to ensure information coordination and mutual support. To this end, the country will need to:

i) Develop service standards and a handbook for the TICs in collaboration with the regional governments;
ii) Provide training to staff providing tourism information;
iii) Improve material resources in priority TICs;
iv) Develop an IT platform to support a network of TICs to be set up in coordination with the regions.

Set up a toll free tourist-specific call centre

Given that potential visitors may from time to time require real time information and support, it will be necessary to set a toll-free tourist call centre to provide information of marketing and support nature to handle both incoming and in-country enquiries. This will also be instrumental in establishing good visitor relations which could potentially lead to further marketing of the country via word of mouth and also to repeat visits. What is more, such a centre could be important in serving potential markets where the use of the internet may still be limited such as the regional Africa market.

Create a framework for destination awareness among the travel trade

Noting the central role that the travel trade plays in destination marketing and their control over tourist decision choices, efforts will be made to use ICTs to impart the travel trade within target source markets with information about the destination and on how to sell Ethiopia as a preferred tourist destination. Such a channel will also be used to provide real-time updates to the travel trade and identify destination champions who may also be targeted for further promotion initiatives including familiarisation tours.

[14] Lessons can be learned from such countries as Japan which has created a website targeting to build a positive destination among children (See www.web.japan.org/kids), and the Malta Tourism Authority that has created its own site to manage electronic word of mouth (e-WOM) (See eLearning Courses on Tourism Destinations: Travel Agents' Perceptions. in: http://www.webatelier.net/reports; www.visitmalta.com/en/)

E. Objective: Establish institutional and strategic frameworks for marketing the country as a tourist destination

Formulate national and regional tourism marketing strategies

There is need to have a well-coordinated tourism marketing approach. This will be achieved through the formulation of a national tourism marketing strategy that will be used as a framework for regional tourism marketing. Ideally, these strategies should be geared towards growing the domestic, regional and international tourist numbers.

Develop an institutional framework to support strategic partnerships in destination marketing

Effective marketing of the country will require institutional alignment and strategic partnerships both at the national and regional levels comprising key tourism stakeholders. Given that the range of tourism stakeholders may have different marketing priorities, an institutional framework will be key to ensuring that such priorities are in tandem with the broader regional and national marketing goals. This will also facilitate the alignment of regional marketing strategies with those of the broader national level strategies with a view to establishing synergies that are essential in creating a critical marketing mass and in so doing, minimising duplication. Further, there is need to intensify public-private sector partnership as an effective marketing and promotion force under the auspices of a National Tourism Association, sectoral associations and other relevant organisations.

Institutionalise the bidding to host major conferences

The capacity of the country to host international conferences and conventions seems underutilised noting the availability of mega event facilities, for instance, the AU and UNECA facilities in Addis Ababa and the growing image of Addis as a diplomatic centre for Africa. To optimise this image, there is need to establish a multi-stakeholder unit dedicated to marketing the country as a conference destination and facilitating bidding for mega international conferences. This unit would bring together ETO, MoCT, MoFA, Ethiopia's leading sports personalities, and the country's diaspora, among others.

Develop joint marketing strategies with neighbouring countries

The potential to develop trans-national and trans-boundary products will generate opportunities for the formulation of joint marketing strategies and develop packages with neighbouring IGAD countries.

4.4.3 Framework for the Strategic Programme

The Ethiopia Tourism Organisation (ETO) is responsible for marketing the country as a tourism destination. Towards this end, ETO will take a leadership role. To begin, ETO will develop a national framework for tourism marketing. Subsequently, informed by the national tourism marketing framework, the regional governments will also be required to have their respective destination marketing frameworks spearheaded by regional DMOs, which comprise key stakeholders and will be responsible for marketing the respective regions.

In order to further ensure that the country is moving in one direction, the national tourism marketing framework will also inform the marketing efforts of the private sector players wishing to market their respective goods and services. Importantly, however, the capability of DMOs at both the national and regional levels to effectively execute their marketing roles will have to be enhanced. Further partnerships will also see the private sector, Ministry of Foreign Affairs, international organisations such as UNECA and AU, Ethiopia's leading sports personalities, the country's diaspora, among others, playing a role in the promotion of the country as a tourist destination.

4.5 Pillar Four: Investment in Tourism Facilities and Services

4.5.1 Introduction

Tourism infrastructure basically refers to the facilities and services within a destination that are necessary to enhance the experiences of tourists. As such, tourism infrastructure is, therefore, of critical importance not just in terms of availability of such facilities and services, but also in terms of their quality and standards. The availability, quality and standards of the prevailing tourism infrastructure is important in boosting the competitiveness of destinations. What is more, this is one of the key aspects that tourists take into consideration when choosing holiday destinations. This aspect also features prominently amongst organisers of mega events when making decisions on the suitability of destinations to host such events. These facilities and services include all types of accommodation, cultural villages and centres, conference and exhibition facilities, souvenir shops, art galleries, dining, night clubs, and so on.

It is important to note that actions in this programme area are additional to those under the human resources development; product development; destination marketing and promotion; tourism policy, regulations and institutional framework; and sustainability, all geared towards creating a competitive destination, which in one way or the other, will serve to position Ethiopia as a preferred investment destination. Specific actions in this programme will focus on three main outcomes:

a) To enhance the capacity of the existing tourist facilities
b) To create a conducive environment to attract investments in tourism infrastructure
c) To promote the potential investment opportunities for tourism services and facilities

4.5.2 Actions

A. Objective: Enhance the capacity of the existing tourist services and facilities

This will be aimed at enabling the existing tourist facilities and services to competitively serve visitor needs and grow investments.

Institutionalise the classification of hospitality facilities

To guarantee that the country's hospitality facilities meet international service standards, the need for classification of such facilities is imperative. To achieve this, a classification criteria, benchmarked on the best global standards will be developed. This tool will have different modules for the different types of hospitality facilities including hotels, guest houses, lodges, and restaurants, among others. It is important to note that such a tool will not only be used for classification purposes, but will also serve as a guide to hospitality investors and facility developers.

This classification tool will be developed through a multi-stakeholder consultation and be implemented through a multi-stakeholder body bringing together representation from both the public and private sector players with representation from the regions.

Develop quality management systems for the different sectors in the country's tourism industry

For the application of quality management, it is important to understand that each stage of the visitor journey to the destination, pre-during and post-visit is significant to the visitor's perception of the destination image. A value- chain approach will therefore, be used in developing a Quality Management System for Ethiopia's tourism sector. A good effort towards this direction has been undertaken through the Quality Management Concept for Aksum[15], modelled after the Swiss

[15] The Quality Management Action Plan for Tourism in Aksum, February, 2009.

Model for Total Quality Management (The "Quality Seal of Approval for Swiss Tourism")[16] that also borrows from the European Foundation for Quality Management[17]. The National Quality Management System will be developed through consultation and involvement of both national and regional stakeholders, with strong participation of the private sector.

Develop an after-care programme for tourism investors within the country to encourage them to grow their investments within the country

An after-care programme will be implemented to help the in-country investors to successfully and profitably manage their ventures including gaining corporate approval for expansion and re-investment of profits. This programme will also focus on helping the firms to form strong links with local suppliers and service providers. Towards this end, the EIC has made some strides in implementing an aftercare programme for in-country investments.[18] In particular, EIC's agriculture and service sector projects facilitation and aftercare division can be utilised to focus more on the tourism sector.

B. Objective: Create a conducive environment to encourage investments in the tourism sector

Creation of a positive and transparent investment climate

Evidence now suggests that investors are looking for stable and transparent economies in which to invest. To ensure Ethiopia's tourism investment climate becomes more positive and transparent, and be seen as such by the investor market, the following strategies will be implemented:

a) The creation of official procedures that will encourage investment in all aspects of infrastructure and remove the need for corruption as a means of getting things done. The procedures created by the Ethiopia Investment Commission will need to be elaborated to feature specific procedures for the tourism sector.

b) Improvement of the investment environment on a continuous basis, for example, by alleviating administrative regulations and providing efficient support for information distribution.

c) Making incentives more flexible, through consultation or negotiation if necessary, with individual foreign investors rather than by the uniform criterion that may not recognise specific needs and local conditions.

d) The provision of strong protection for foreign investment, backed by the force of law.

e) Making revolving lines of credit available to the private sector for tourism projects that support strategic societal objectives.

Creation of special tourism investment zones

Consideration will be given to establishing special zones where investment incentives and clearly understood procedures are in place for tourism development. This will be done in line with the proposals on the establishment of flagship projects identified in Strategic Pillar 2.

Within these zones, support for infrastructure development, especially in key environmental

[16] A programme with various instruments designed for Swiss tourism with the aim of systematically promoting and securing ongoing quality development. The programme consists of three levels: in level 1, the focus is on quality of service and in level 2 on management quality, level 3 adopts TQM systems. The system uses quality coaches and is administered by the private sector. The government supports the programme through subsidies.

[17] EFQM 1995.

[18] This includes implementing an outreach programme to investors in priority sectors. The agency was in 2010 divided into two divisions: (a) manufacturing projects facilitation and aftercare; and (b) agriculture and service sector projects facilitation and aftercare (See UNCTAD, 2011 p.11).

and public sector areas such as water supply, electricity and telephone will be prioritised. Special financial incentives in the form of special interest bank loans for infrastructure investment will be established to further attract investment. Consideration will also be made to declare such Special Economic Zones as a "tax haven", with the removal of restrictions on corporate tax, income tax, estate duties, capital gains tax, sales tax, and other taxes and levies.

Design attractive incentives targeting investors for the tourism sector

In addition to the already existing incentives targeting the tourism sector, further possible incentives will be pursued including:

a) Financial incentives, through which the government will provide grants or loans from its own resources or through a government financial institution. This is in line with the proposed Investment Fund targeting the domestic investor. [19]

b) Fiscal incentives, through which the government will provide tax holidays and deductions, customs duty exemptions, concessions or capital expenditure allowances.

Encourage lending institutions to support tourism investments

A major challenge facing tourism infrastructure development is the lack of adequate credit facilities in the country. Efforts will be undertaken to create awareness to the various lending institutions on the various opportunities that exist and the need to avail such credit facilities. MoCT, through EIC, will also facilitate exploration of funding opportunities from regional and global lending institutions such as the African Development Bank (AfDB) and the World Bank's International Finance Corporation (IFC).

Establish a tourism investment fund

In line with the above, it will be crucial to establish a low interest revolving tourism investment fund, particularly targeting Ethiopians who wish to invest in the tourism industry. Such a fund should also prioritise the development of facilities in the non-core tourism parts of the country to foster tourism growth and development. This strategy has been in use in Kenya since 1965 with, first, the establishment of the Kenya Tourism Development Corporation [20] charged with the mandate of facilitating and providing affordable development funding and advisory services for long-term investment in Kenya's tourism industry; and later in 2002, the establishment of the Tourism Trust Fund, jointly by Kenya and the EU mainly involved in identifying, supporting and funding community tourism projects.

Encourage cooperation and an integrated approach to promoting tourism investment in the country

Noting that the tourism industry by its very nature is fragmented, both in the public sector as well as in the private sector, advocating for tourism investment within the country will require cooperation among all relevant stakeholders. This will be achieved through:

- The encouragement of other governmental agencies in addition to those directly under MoCT to become involved in tourism investment.
- Cooperation between various organisations including the development partners, the private sector and relevant government agencies, in advocating for tourism infrastructure investment as a legitimate development tool for the country's economy.
- Involvement of the federal and regional planning agencies in integrating area development plans with tourism development.

---

[19] See Strategic Programme 2: Tourism product development.

[20] Kenya Tourist Development Corporation (KTDC) is a corporate body established in 1965 through an Act of Parliament, Cap 382 of the Laws of Kenya. (www.ktdc.co.ke/downloads/KTDC%20ACT.pdf).

Encourage regions to create necessary conducive business environment to attract tourism investments

The different regions in the country will be encouraged and facilitated to develop tourism development plans, integrated into the national framework. Such plans should detail a clear roadmap of how they will attract investments in the sector. It is important to note that a number of regions and cities have taken efforts to develop such plans (for example, Tigray). To encourage investment in tourism infrastructure development, the country's regions will have to show commitment in providing appropriate support infrastructure, such as transport, water and energy.

C. Objective: Promote investment opportunities for tourism services and facilities

Organise regular regional, national and international tourism investment forums

In order to raise awareness on the investment opportunities that exist in the country, MoCT will work closely with key stakeholders to organise tourism investment forums targeting potential investors at the regional, national and international levels.

Establish tourism investment information centres

Countries world over are increasingly competing for a piece of the global investor' market. There is an urgent need to provide investors with relevant information on tourism investment possibilities in the country. This will be achieved through the establishment of tourism investment information centres, both within the country and in the country's embassies in the target source countries, to assist national as well as foreign investors. The centres would serve as a one-stop shop for tourism investment, providing information on investment opportunities and regulations in the country's tourism sector.

Foster collaboration in the promotion of tourism investment

In line with the need to create awareness of the existing investment opportunities in Ethiopia, MoCT will work closely with the Ethiopia Investment Commission (EIC) to profile tourism as a key sector for investment. This will be achieved through having a dedicated section within EIC to specifically handle tourism investment promotion. Further collaboration will be pursued through the country's missions abroad. Foreign investors in the country will also be incorporated in marketing the country as a preferred investment destination through sharing of their experiences during investment promotion campaigns.

Initiate strategies to involve Ethiopia's diaspora in promoting investment in tourism

In addition to domestic and international investors, the large Ethiopian diaspora will be targeted for investment promotion for the tourism sector. Diaspora involvement in tourism can vary from direct investment, knowledge transfer, promotion or brand championship, to fostering bilateral trade with local tourism businesses. The focus on the diaspora will be as an appreciation of the clear added value in the tourism sector, as they know well both the supply and the demand side—both the destination and the source market. The country has already developed some initiatives targeting the diaspora[21] and these should be utilised in investment promotion for the tourism sector [22].

[21] A diaspora coordinating office is already in place within the Ministry of Capacity-Building, which also works with the MoFA to promote skills and technology transfer. The EIC has created a post of Diaspora Affairs Officer to encourage Ethiopians in the diaspora to engage in investment activities.

[22] Lessons from initiatives from Nigeria, Kenya, and Afghanistan serve as examples of similar types of mechanisms targeting diaspora investment. The Afghanistan Investment Guarantee Facility (AIGF) is a good example.

4.5.3 Framework for the Pillar

To implement the above strategies and actions, MoCT will endeavour to forge necessary collaborations and partnerships with a number of agencies and sectors including the EIC which has the primary responsibility of promoting investments within the country, MoFA, the regional governments, the private sector, the country's diaspora, among others.

4.6 Pillar Five: Human Resource Development

4.6.1 Introduction

Human resource development is key to enhancing the competitiveness of any given tourist destination. Given that the tourism industry is largely service oriented, the role of human resource is ever more important. Evidence exists that the leading destinations of the world also have corresponding high quality of human resource. When considering the development of human resource for the tourism sector, it is essential that a holistic approach is taken to include those working directly in the industry or private sector, those in the training institutions and those charged with the responsibility of policy and planning for the sector. In the case of those working in tourism businesses, human resource development is usually geared towards enhancing the skills and knowledge of those providing the services for the tourism industry. Secondly, human resource development focuses on enhancing the capacity of government officials and those working in the research and training institutions to better plan, research and develop the sector. In addition, it would be equally important to create awareness of the importance of the tourism industry in the country among government officials whose dockets may impact tourism development in one way or the other, for instance, immigration officials, infrastructure, finance et cetera.

This programme aims at achieving two strategic outcomes:

a) To address the short term HR needs for the tourism sector.
b) To build a long term supply of globally competitive human resource for the sector.

4.6.2 Actions

A. Objective: Address the short-term HR needs for the tourism sector.

Promote the development and upgrading of manpower capacity in the country

There is urgent need to develop the capacity of those working within the country's tourism sector. Measures to address this immediately would include encouraging and facilitating training on-the-job within the country and where appropriate, outside the country. This can be well enhanced through student-work induction programmes and management training programmes both within the country and abroad including within the IGAD region under the framework of the IGAD STMP recommendations.

Create a framework to facilitate apprenticeships and experiential learning for tourism sector graduates

To ensure that the country's tourism sector graduates gain hands-on experience that would enable them find jobs and perform well within the sector, MoCT should spearhead the setting up of an office dedicated to compiling a database of tourism sector graduates and help link them with opportunities for apprenticeship and experiential learning in leading tourism organisations and firms both within and outside the country.

Reduce barriers to inward labour mobility to attract external expertise to bridge the short-term HR deficit in the country

This will form another measure to address the short-term skills shortage facing the country's tourism sector. This will involve strategically encouraging professionals with the necessary skills and knowledge to both work and train the locals. This is a world-wide practice in both bridging the short-term human resource deficits and knowledge transfer. Rwanda, for instance is already implementing such a strategy. The same was successfully adopted by Kenya in the infancy stages of her tourism industry. Target countries will be identified and citizens from those countries will be encouraged to apply for jobs in the country. A starting point is through the IGAD STMP framework that encourages intra-regional labour mobility.

It is important to note that:

a) This initiative will only be a short-term measure as the country puts in place measures to develop her tourism HR base.

b) Secondly, the scheme would only target those skills and competencies not available within the country

c) The scheme will also require the employing organisations to provide a roadmap on how and when such foreigners will be replaced with locals.

B. Objective: Build a long-term supply of globally competitive human resource for the tourism sector

Develop a Strategic Human Resource Development Plan for the tourism sector

A long-term HR development strategy for the tourism sector will be developed. In developing such a strategy:

a) MoCT will undertake a HR inventory at the different levels of the tourism industry in terms of the quality and the quantity of the prevailing tourism human resources in the country. This will involve carrying out a tourism skills audit to better inform human resources development both at the national and regional levels. The aim of such an exercise will be to identify any gaps in skills and competencies within the tourism sector's three levels of human resources needs:

- Enterprise level (both managerial and operational)
- Research and training institutions
- Policy and planning level

b) Following the above HR audit, a Strategic Human Resource Plan (HRP) will be developed in order to address the short term and long terms HR needs of the sector. This plan will endeavour to set out the HR targets and strategies for their realisation within the STMP period and beyond.

Formulate a National Tourism Training Policy

To facilitate a coordinated approach to tourism training and human resource development, MoCT should formulate a national tourism training policy. Such a policy would focus on such aspects as:

i. Maintaining industry training standards

ii. Approval and certification of industry training institutions

iii. Approval of training programmes and standards recommended by industry

iv. Registration, tracking and certification of trainees through approved certification programme and industry training centres

v. Funding the industry training (based upon industry developed plans and priorities)

Upgrade CTTC as a model centre-of-excellence in tourism training in the country

To ensure the realisation of long-term availability of quality training for the industry within the region, it is necessary that a model centre of excellence in tourism training, benchmarked on the best practices in the world, be established within the country. In view of this, the Catering and Tourism Training Centre (CTTC) will be upgraded in terms of facilities and human resource capacity. Further, measures will be taken to ensure CTTC establishes partnerships with existing centres-of-excellence both in the African region and internationally. This should later be adopted for each region where tourism is a priority sector.

Develop relevant skills and knowledge for all personnel in the tourism sector businesses

It will be crucial that the country's skills and knowledge base is enhanced both at the national and regional levels. In line with this, there is need to increase the number of national and regional institutions that are offering tourism training and simultaneously putting in place mechanisms to ensure that there is Continuous Professional Development (CPD) with the aim of further ensuring that the prevailing skills and knowledge are up to date. This may require providing incentives for employers to release their staff for further training such as free training programmes or even tax incentives.

Continuous capacity-building of tourism public officials

It is imperative that the capacity of those mandated with the responsibility of managing, planning and formulating relevant policies meant to ensure the competitive development of the country as a tourism destination is strengthened. This will be achieved through continuous empowerment of officials on all levels of government, both at the national and regional levels, with a view to enhancing their capacity to formulate policies and plans and to oversee their effective implementation. This will require that tourism development training programmes targeting such officials are established.

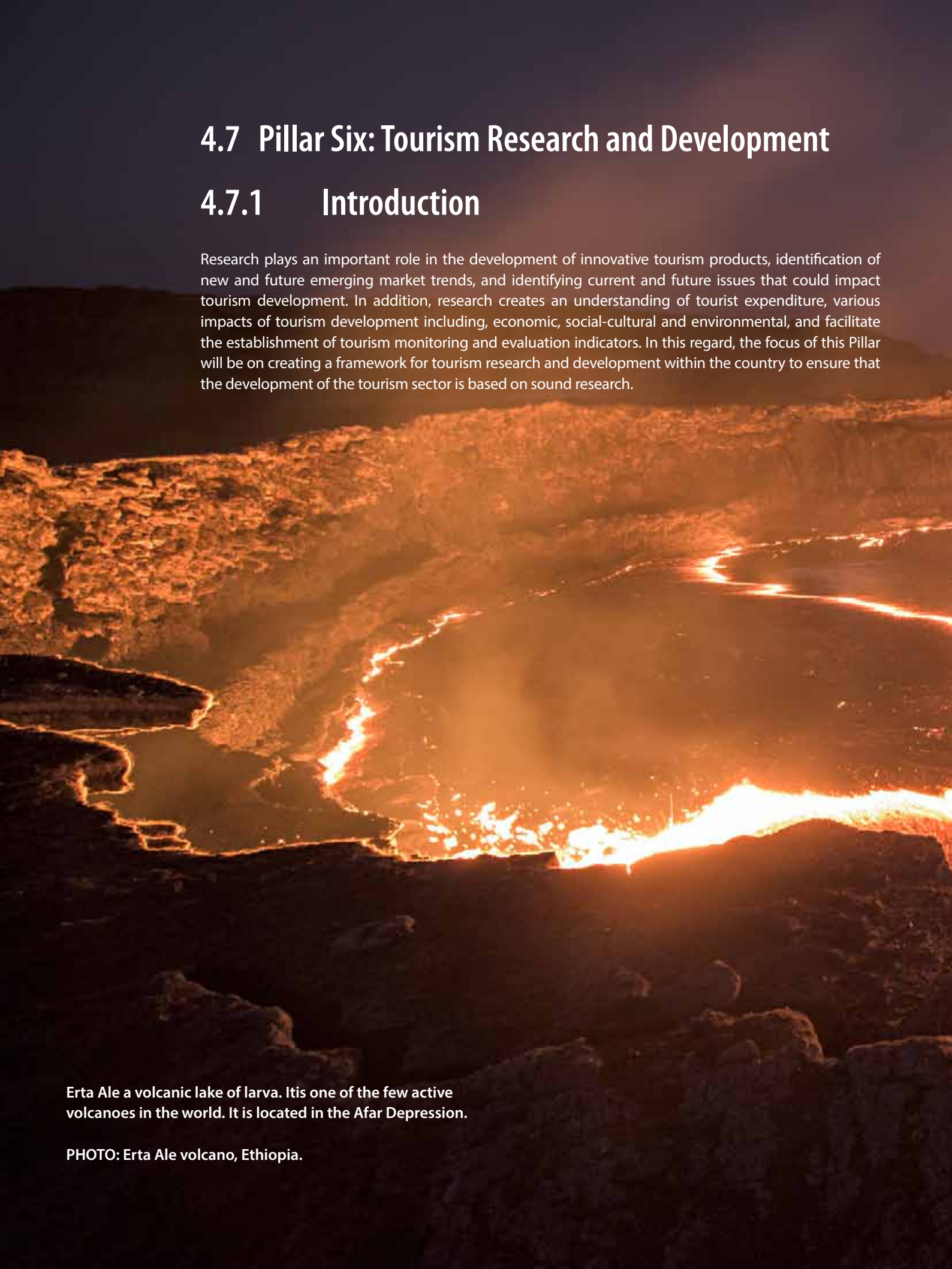
4.6.3 Framework for the Pillar

Currently, the responsibility of developing the human resource base rests upon the Technical and Vocational Education Training Agency and higher education institutions as informed by the Higher Education Proclamation. Thus in order to ensure that the quality of training is good, the capacity of MoCT will have to be enhanced so as to certify the institutions offering such training. The private sector will also be encouraged to participate in the country's tourism HR development through CPD and private institutions. Furthermore, in order to ensure a sustained human resource pool across the country, it will be beneficial to integrate tourism related courses into the general national curricula with a view to nurturing relevant basic skills and knowledge at a very early stage. It will also be necessary to benchmark best practice both in the region and internationally to ensure that the quality of training is globally competitive.

4.7 Pillar Six: Tourism Research and Development

4.7.1 Introduction

Research plays an important role in the development of innovative tourism products, identification of new and future emerging market trends, and identifying current and future issues that could impact tourism development. In addition, research creates an understanding of tourist expenditure, various impacts of tourism development including, economic, social-cultural and environmental, and facilitate the establishment of tourism monitoring and evaluation indicators. In this regard, the focus of this Pillar will be on creating a framework for tourism research and development within the country to ensure that the development of the tourism sector is based on sound research.



Erta Ale a volcanic lake of larva. Itis one of the few active volcanoes in the world. It is located in the Afar Depression.

PHOTO: Erta Ale volcano, Ethiopia.

4.7.2 Actions

A. Objective: Create a framework for tourism research and development within the country

Establishing a national tourism research management and documentation centre

Much relevant research has and is continually being undertaken by a number of organisations. To ensure that this is available throughout the sector, avoiding duplication and adding to the national knowledge base, requires the establishment of a core centre. The main role will be to coordinate, manage and disseminate tourism research outputs conducted by concerned organisation. The centre will be expected to work closely with the higher learning institutions so as to enhance overall research capacity across the country.

Establish integrated national and regional tourism statistics system

Collection and analysis of visitor statistics is undertaken at a national level by the National Tourism Statistics department within MoCT and locally by Regional Culture and Tourism Bureau. It is essential that the structure, format and content of these is harmonised and computerised to provide policy and decision makers within the tourism sector with comprehensive and consistent data.

Establish international partnerships to facilitate information exchange and knowledge sharing

One of the major challenge facing Third World Countries is the inability to effectively participate in global conventions and the lack of factual information to articulate these countries' respective priorities. For instance, the current climate change debate and the proposal to impose carbon tax on long haul travel will have an impact on Ethiopia and other neighbouring countries which rely heavily on long haul tourist market. Research can therefore, play a key role in informing key positions in the global deliberations and given that the issues that confront the country and its neighbours are similar. To this end, regional and international partnerships in tourism, with specific focus being paid to the IGAD member countries (as recommended by the IGAD STMP) will be established.

4.7.3 Framework for the programme area

Currently, tourism research, mainly in the form of a compilation of tourism statistics, is carried out by the MoCT which releases the Tourism Statistics Bulletin. The bulletin provides information on tourist arrivals, tourism receipts, accommodation (number of hotels and rooms) and tourism suppliers (tour operators and travel agents). In addition, there are a number of universities that offer tourism degree programmes. Further, a number of international consultants are involved in undertaking consultancy research on a number of aspects of tourism development in the country with support from development partners such as UNECA, the World Bank, UNDP and other bilateral partners. The private sector is also involved in compiling tourism data but for internal usage. In this regard, institutionalising through a tourism research institute, under MoCT, will be essential to not only undertake research but also to coordinate the different initiatives to avoid duplication, ensure the quality of output, enable accessibility through a repository of such findings, provide a monitoring mechanism for research uptake and most importantly, guarantee local capacity building to conduct research for the tourism sector.



4.8 Pillar Seven: Tourist Safety and Security

4.8.1 Introduction

Different from other traditional economic sectors like agriculture, the tourism industry is highly susceptible to externalities, more particularly those relating to safety and security. Moreover, owing to its linkages, such externalities do not only impact on the tourism sector, but rather also the economy as a whole given the sector's multiplier effect that could have adverse impacts on other sectors of the economy.

A major challenge, however, in dealing with issues relating to safety and security in the tourism sector is that issues such as political or civil strife, environmental disasters and terrorism, are beyond the direct control of the industry. Nonetheless, it is essential that measures are put in place to enhance the safety and security of not just visitors alone, but also that of investors and their respective investments. This, thus, will form the focus of this programme area as it seeks to establish a framework for safety and security for the tourism sector in the country through the designing and developing a tourism safety and security action plan.

In Africa, a number of countries have also realised the potential of sports in tourism development, for example, South Africa. The great Ethiopian run has over the last years gained a lot of momentum and popularity.

PHOTO: Soldiers form a human shield around the participants of the 13th edition of the great Ethiopian run.

4.8.2 Actions

A. Objective: Design and develop a tourism safety and security strategy

Develop a strategy for tourist safety

The creation and maintenance of a safe environment on access routes, destinations, within premises, circulation areas, outdoors and access to first aid and professional medical treatment in the event of illness or accident must be addressed within destination planning. These issues require to be formulated within a comprehensive strategy and stakeholders made aware of their ongoing responsibilities.

Ensure the national disaster and risk management plan take tourism into account

While security is important to residents and visitors alike, destinations with significant tourist populations must address their specific needs through their inclusion within national security strategies and procedures. Therefore, the national disaster and risk management plan should be reviewed to ensure that it takes tourism into account.

Establish a tourist police unit

Given the sensitivity of the tourism industry and tourists to safety and security related issues, there is need to establish dedicated tourist police units or departments both at the national and regional levels. In addition, due to the fact that some of the tourist safety and security concerns are cross-border, a regional mechanism needs to be put in place to facilitate collaboration of such police units with a view to enhancing both the national and regional (cross-border) tourist safety and security. For the case of Ethiopia, this unit will be a specialised multi-lingual police service under the supervision of the National Police Service dedicated to tourist safety. Beside the policing training, members of this unit will be equipped with competencies in such areas as disaster and emergency management, psychology, cross-cultural skills, and people relations skill. The unit will be responsible for such safety issues as:

i. Ensuring onsite and enroute tourist safety and protection
ii. Establishing and operating multilingual emergency toll free call centres integrated into the national toll-free tourist call centre
iii. Establishing tourist emergency evacuation services

Establish Tourist Victim Support Services

There is need to establish tourist victim support services for visitors who have been robbed, attacked, involved in accidents or otherwise victimised during their stay in the country. Such services will be available at the regional levels, with a coordinating office at the national level.

4.8.3 Framework for the programme area

Currently, there is no clear framework for tourism safety and security in the country. Security issues are generally dealt with the national police while local militia provide informal security services in such areas as the Omo Valley. A formal framework to deal with tourism specific safety and security issues is thus urgently needed. Under the general direction of a dedicated taskforce established by the TTC, this framework will bring together both government agencies and the private sector. In addition, the IGAD framework, particularly the Conflict Early Warning and Response Mechanism (CEWARN), will also be integrated in the national framework.

4.9 Pillar Eight: Tourism Support Infrastructure and Services

4.9.1 Introduction

Generally, the relationship between infrastructure and tourism development should be viewed from two perspectives. On the one hand, infrastructure should be seen as a means to facilitating tourism development and on the other hand, some infrastructural development initiatives, though not originally built for tourism purposes, such as bridges and dams, have evolved to become major tourist attractions. Projects such as the world's tallest bridge, the Millau Viaduct in France, the world's longest bridge, the Jiaozhou Bay Bridge in China, the London Tower Bridge in the United Kingdom and the Hoover Dam in USA provide some examples to illustrate this. In this regard, the Renaissance Dam should also be considered as a tourist attraction once it is completed. Nevertheless and preferably, before embarking on any form of tourism development, there should be appropriate support infrastructure in place. Ideally, this should also be regarded as a strategy to providing a conducive environment for investors wishing to exploit opportunities that may arise from tourism development. Though some tourism development initiatives such as independent resorts, may not fully require connection with the national or regional infrastructure networks, such as roads, railways and airports, they nonetheless need to have some infrastructure in place including access to water and waste disposal systems.

4.9.2 Actions

A. Objective: Engender tourism industry development focus in national and regional infrastructure development

Initiate strategies to ensure the on-going national and cross-border infrastructure development initiatives support tourism development

A number of infrastructural projects have been proposed both at the national level under the GTP framework and in the wider Eastern Africa region including the LAPSSET project which is already in progress. MoCT will work closely with relevant authorities or organisations responsible for the implementation of such infrastructural development initiatives to ensure that tourism development initiatives are integrated. This may require creating awareness on the importance of tourism development and the accompanying role of relevant infrastructure. In addition, initiatives to promote such transport systems for use amongst tourists, with particular emphasis placed on cruise and rail tourism as a strategy to increase the tourism product offerings will be established.

Provision of quality and reliable infrastructure within tourism priority areas

A special focus will be given to ensuring that tourism priority areas are serviced with reliable infrastructure across the country including road network, water, electricity and sewerage. Efforts will also be undertaken to ensure their lead-time to connectivity of any new investments is reduced to the possible minimum amount of time.

Provide effective and appropriate ICT infrastructure in tourism priority areas

In the current advent of the information age and the ever increasing competition for global opportunities, the country has no choice but to embrace approaches that will enhance her ICT infrastructure and specifically for the tourism sector. Working closely with the Ministry of Communication and Information Technology (MCIT), MoCT will therefore, spearhead the advocacy for the development of effective and appropriate ICT infrastructure with a view to enhancing the country's global competitive advantage.

4.9.3 Framework for the Priority Area

The GTP provides a broad framework to infrastructure development in the country for the next five years. It is expected that, since tourism is also a key economic sector, and through the integrated development approach such infrastructure development should, to some degree, benefit the industry. However, given that the GTP infrastructure development focus is also on other sectors of the economy, it will be important that MoCT highlights the infrastructure development priority needs necessary for the development of a competitive tourism destination. This should, further, be done in line with the on-going regional infrastructural initiatives to promote both national and cross-border tourism. It is, nonetheless, important to note that such on-going initiatives should not be used as the only basis for tourism development, but rather, that tourism development initiatives should also serve as an incentive to expand the national and regional infrastructure networks.

4.10 Pillar Nine: Conservation and Preservation of Natural and Cultural Resources

4.10.1 Introduction

Tourism in Ethiopia will be developed in a manner that will enhance the conservation of the country's natural and cultural resources. It is recognised that sustainable tourism development will require the participation of all relevant stakeholders. More so, achieving sustainable tourism is a continuous process and it requires constant monitoring of impacts, to enable necessary preventive and/or corrective measures to be taken whenever necessary.

4.10.2 Actions

A. Objective: Enhancing the conservation and preservation of natural and cultural resource

Site designations, demarcation and gazetting of the natural and cultural heritages of the nation

Many of the wildlife protected areas and cultural heritages do not have any legal boundary demarcated by the law of the country. Therefore, there is a need to designate and demarcate the resources with involvement of local authorities and communities.

Develop management plans and operational guideline for conservation of natural and cultural resources

While sustainability underpins all activities within the development of the tourism sector, special attention must be paid to sensitive, vulnerable sites. Strict tourism guidelines will be developed in compliance with national and regional conservation and protection policies and within Management Plans for protected areas and heritage sites.

Build community awareness on the importance of conservation and preservation of natural and cultural resources

Apart from the moral and ethical imperatives to protect rare and fragile resources, host communities will be made aware of their economic and amenity value both locally and to the nation at large through the development of carefully planned and sensitive tourism activity. To achieve this, continuous awareness programme will be implemented.

Enhance the capacity of wildlife rangers to protect wildlife in the protected areas

To strengthen law enforcement activities in wildlife-protected areas of the country, there is need to introduce structural arrangements that will enhance the capacity of the wildlife rangers including establishing an armed wing and other infrastructural support, particularly, air surveillance and other technology based facilities.

Control the number of tourism facilities in national parks and other protected areas in consideration of their carrying capacity

The number, type and location of tourism facilities in protected areas should be limited and decided as part of a broader and integrated tourism development strategy. Although, in general terms, some tourism facilities of international standards should be available in protected areas, the focus should be on key facilities for day visitors and on those targeting specific nature-based types of tourism such as trekking or bird-watching that may require overnight stays. High-end facilities could also be considered in carefully selected sites. In any case, an excess of accommodations in the parks should be avoided.

Promote tourism economic activities within the buffer zones of national parks and other protected areas

As a way to embrace a paradigm shift in the development of tourism in protected areas, the country should foster tourism economic activity in the buffer zones and the urban centres located nearby. This, for instance, would encourage the development of tourist resort cities and towns around these protected areas. Thus, the plans of the protected areas should be aligned with the tourism development plans of the surrounding area. This strategy will present a number of benefits. First, it will discourage concentration of tourism facilities within protected areas and hence promote conservation. Further, the resorts will discourage enclave tourism development and thereby enhance the trickle-down effect of tourism benefits. This will further encourage cluster development by concentrating all the related tourist services (including hotels, restaurants, information services, banking, et cetera) within a given area. A possible starting point would be Gambela National Park that lacks adequate infrastructure. Such a development model would require that the government provides the necessary infrastructure in the target area and then promotes investment.

Foster integrated planning for lake shores

Lakes are important tourism resources and it is prudent to prepare integrated development plans before building new resorts. Plans should include access infrastructure, provisions for public areas (with parking, toilets, pedestrian and bike paths, platforms for birdwatching, small infrastructures for water sports, signposting, food and drink services, etc.). Plans should also establish clear building guidelines for the resorts and other tourism infrastructures in order to minimise visual and environmental impact. They should also provide opportunities for small local businesses and job creation (diversification of tourism services and activities). Existing resorts should be assessed and recommendations for improvement made where deemed necessary.

Develop mechanisms to create awareness on, and foster conservation of natural and cultural resources among the industry players

MoCT, in collaboration with industry stakeholders, will work towards ensuring that incentives and necessary regulations are developed to create awareness and foster conservation of natural and cultural resources through campaigns targeting both the local population and the industry including the guests. Such initiatives would be developed by benchmarking on the best practices globally. A good example is the Eco-Certification programmes developed for the tourism industry by different national chapters of the *International Ecotourism Society*. Kenya's *Ecotourism Society* has developed the *Eco-Warrior Awards* and the *Eco-Labels* to foster ecotourism ideals in the country. To sustainably achieve this goal, the participation of the civil society will be encouraged.



Lalibela is one of the holiest cities in Ethiopia and it is also a centre of pilgrimage for much of the country.

PHOTO: A priest inside one of the churches.



Promote sustainable practices in the operation of tourism facilities and activities including green practices and fair trade standards

Hotels, tour operators and other tourism service providers should be aware of the potential negative environmental and social impacts of their operations and introduce measures to minimise and/or mitigate them. This includes offering fair working conditions to the staff and support the development of local businesses. Special awareness campaigns and mandatory regulation complemented with handbooks, guidelines and training will be implemented. In the future a Green/Fair Trade Certification scheme could be introduced. To sustainably achieve this goal, the participation of the civil society will be encouraged.

Foster participation of stakeholders in the preparation and follow-up of tourism development plans

Mechanisms will be put in place to ensure the participation of stakeholders in the preparation and follow-up of tourism development plans including the different government levels (federal, regional, local), the local communities and the private sector. Part of these initiatives will be to organise thematic working groups to focus on specific issues.

4.10.3 Framework for the Pillar

At the federal level, the responsibility of conserving the natural resources rests upon the Ethiopian Wildlife and Conservation Authority (EWCA), while that of conserving the cultural heritage resources is the Authority for Research and Conservation of Cultural Heritage (ARCCH), both under the MoCT. In total, thirteen national parks and sanctuaries are managed at the federal level by EWCA[23]. In addition nineteen national parks, wildlife sanctuaries and reserves, and 23 controlled hunting areas are managed by regional authorities; with SNNPR being in charge of 10, of which five are national parks [24]; in the Amhara Region, six, and in the Oromia Region, three.

In addition, the United Nations Educational, Scientific and Cultural Organisation (UNESCO) framework will be essential in an effort to better conform the country's conservation efforts to the international standards.

[23] EWCA manages the following 13 protected areas: the Simien Mountains National Park, Bale Mountains National Park, Awash National Park, Nechisar National Park, Gambela National Park, Alatish National Park, Kafta Shiraro National Park, Geralle National Park, Omo National Park, Abijata Shala National Park, Yangudi-Rassa National Park, Senkelle Hartebeest Sanctuary and Babille Elephant Sanctuary.

[24] SNNPR manages 5 national parks: Chebera Churchura, Gibe Sheleko, Loka Abaya, Mago and Maze.

4.11 Pillar Ten: Tourism Development Financing

4.11.1 Introduction

Noting the need to mobilise funding to support the different programmes necessary for the development of the tourism sector including product development, destination marketing and promotion, tourism research, and most importantly, human resource development and training; the need for a formalised funding mechanism for the sector cannot be over-emphasised. The government will, therefore formulate the necessary legislations to ensure the establishment of the relevant mechanism for mobilisation of funding for the tourism sector.

4.11.2 Actions

A. Objective: Institutionalise the mobilisation of financial resources to fund tourism development

Establish a Tourism Development Fund (TDF)

To meet the financial requirements of implementing this STMP and future tourism developments in the country, the Ethiopian Tourism Organisation (ETO) has already been established under MoCT. The ETO will be charged with identifying and management of financial resources to support tourism development initiatives as identified under this STMP. The relevant legislation will be enacted to establish the Tourism Development Fund (TDF) and the necessary implementation framework to make it operational. Priority for the funds mobilised by the TDF will be given to:

i. The development of tourism products and services with particular emphasis on feasibility studies and investor mobilisation efforts for flagship projects and other priority initiatives
ii. Financing the marketing of the country as a tourist destination including market research, branding and other destination promotion initiatives
iii. Financing priority tourism research
iv. Establishment and operation of the national Destination Management System
v. Activities related to the tourism sector safety, communication and crisis management
vi. Financing training and human resource development activities especially the CTTC as a national centre of excellence in hospitality and tourism, and any other tourism and hospitality training institutions as may be decided upon by the MoCT
vii. Support other priority tourism related activities as may be deemed appropriate from time to time

B. Objective: Design strategies to mobilise financial resources to fund tourism development under the TDF framework

Identify sources of financial resources for tourism development

The Management of the TDF will be responsible for identifying and profiling the different sources of financial resources for tourism development. Specifically, the sources of funds for the TDF shall include, but not limited to:

i. Relevant allocation from the national treasury
ii. A Tourism Development Levy (TDL) (See below for further details)
iii. Mobilisation of funds from bilateral development partners (BDP) and donor support [25]

[25] *Donor Inventory for Ethiopia for Private Sector Development & Trade* (The USAID WTO Accession Plus Project, May 2010) compiles a list of the donor community seeking to reduce poverty through private sector and trade development as well as law and policy reform as at 2010. These together with other development partners may be approached to support the establishment of the tourism development fund.

iv. Grants, donations, bequests or other gifts made to the Fund

Establish a Tourism Development Levy (TDL)

A levy to be referred as the *Tourism Development Levy* shall be established though the appropriate legislative channel. This levy shall be collected from the tourism sector businesses, including airport passenger service charge, for the purposes of developing the sector. In the establishment of such a levy, lessons from other destinations where such a fund has been established including Kenya, South Africa's TOMSA[26] and Ghana [27], among others, shall be used. The rationale behind this levy is to direct portions of the tax receipts from the sector directly back into its development. In return, this will serve to convince taxpayers that their taxes are being used in an open and productive manner.

Develop the relevant tools and instruments for mobilising financial resources from the identified partners and organisations.

It is important to note that different approaches will be required to mobilise financial resources from the different sources and organisations. To this end, the management of the TFD will develop the relevant tools and instruments including relevant proposals targeting the identified financial partners.

4.11.3 Framework for the Programme Area

Currently, the tourism sector in Ethiopia lacks a formalised framework for funding its development activities; with the main funding being from the national budgetary appropriation and uncoordinated donor and bilateral support. With leadership from MoCT, implementation of this Pillar will involve the private sector, the Ministry of Finance and Economic Development, the Revenue Authority, and donors and key multilateral partners.

[26] TOMSA stands for Tourism Marketing South Africa. It is the levy collected by tourism businesses with the aim of contributing to the promotion of South Africa as the preferred tourist destination locally and internationally. TOMSA is administered by the Tourism Business Council of South Africa (see http://tomsa.co.za/).

[27] www.ghana.travel/services/tourism_levy/



The newly built African Union headquarters in Addis Ababa. The $200m project was funded by the Chinese government as a gift to the African Union.

PHOTO: The rooftop of the AU headquarters.







5 STMP IMPLEMENTATION FRAMEWORK

Introduction

This framework provides the relevant actions to be undertaken within each identified Strategic Pillar together with the means of verification in terms of milestone indicators. The framework further indicates the institution bearing primary responsibility and the period within which the strategic actions should have been implemented. The time schedule is further categorised into three horizons: short term (1-3 years), medium term (4-6 years), and long term (7-10 years). Such a categorisation will help in identifying the "quick wins" among the strategic actions and provides an indicative schedule of activities within the STMP implementation. Moreover, it is also important to note that some of the institutions allocated primary responsibilities under this framework will need to be established and then operationalised. Notable among these is the Tourism Development Fund Management.

Further, the framework provides an indicative budget for each activity and the underlying assumptions. In addition to the provided assumptions, the framework assumes that a stable political and economic climate will prevail throughout the implementation period both within the country and externally.

Markets in Ethiopia are lively and interesting places to visit. The market in Addis Ababa, for example, is a main attraction.

PHOTO: A young boy in a market near Addis Ababa.

Pillar One: Policy, Regulatory and Institutional Framework

Objectives	Actions	Objectively Verifiable Indicators (OVIs)	Primary Responsibility	Other Organisations Involved	Time Schedule: Key: A=Short Term (1-3yrs) B= Medium Term (4-6yrs) C= Long Term (7-10yrs)				Estimated Cost (ETB)	Assumptions (in addition to availability of funds)
					Duration (yrs)	A	B	C		
Establish a framework for formulation and implementation of tourism policies and regulations	Formulate a legal framework to guide the development of the tourism sector	A legal framework (Tourism Act) enacted to guide the development of the tourism sector in the country	MoCT	Relevant federal institutions	1				5m	Support from the political and industry stakeholders
Strengthen and harmonise public sector institutions	Enhance the institutional capacity of the Tourism Transformation Council to spearhead tourism growth and development	The relevant working committees formed to enhance the institutional capacity of Tourism Transformation Council to lead the country's tourism development	TTC	Relevant government departments	1				50m	Availability of funds to undertake the mandates and operations of the committees including benchmarking tours
	Strengthen the capacity of regional tourism institutions and that of other relevant institutions to deliver on their respective mandates	The capacity of regional tourism institutions is strengthened	MoCT	ETO, ARRCH, EWCA	Continuous				50m	Cooperation from the relevant regions
	Harmonise regional tourism development plans with those at the national level	Regional tourism development plans and policy frameworks harmonised with those at the national level	MoCT	BoCT	Continuous				5m	Cooperation from the relevant regions
	Harmonise the role and functions of national tourism institutions	The role and functions of national tourism institutions is harmonised	MoCT	ETO, ARRCH, EWCA, CTTC	2				2m	Cooperation from the relevant institutions
	Review and update tourism related policy, regulations and legislation	Tourism related policy, regulations and legislation are reviewed and updated	MoCT	BoCT & other relevant stakeholders	2				10m	Cooperation from the relevant stakeholders
	Mainstream tourism development into the broad economic development policies within the other sectors	Tourism development mainstreamed into the broad economic development policies within the relevant sectors	MoCT	Other federal ministries	Continuous				3m	Cooperation from the relevant ministries

Strengthen private sector institutions	Establishment and strengthening of existing private companies and trade associations	Existing private companies and trade associations are strengthened	MoCT	ETO, ARRCH, EWCA, and existing trade associations	Continuous				3m	Cooperation from the relevant stakeholders
Strengthen public-private collaboration	Establish and strengthen regional Tourism Transformation Councils (TTCs)	Tourism Transformations Councils established at priority regions	TTC	Regional governments	2				10m	Goodwill and cooperation from the regional and national stakeholders.
	Establishment of destination management organisations in major tourist areas	Number of DMOs established in major tourist areas	MoCT	Relevant private and public stakeholders	3				6m	Cooperation from the relevant stakeholders
Strengthen linkages with other sectors	Synchronise Tourism Development policies with those of other sectors	Tourism development policies synchronised with those of other sectors	MoCT	Relevant federal institutions	3				5m	Cooperation from the relevant stakeholders
	Review and align entry visa requirements and procedures with tourism development strategy	Entry visa requirements and procedures with tourism development strategy reviewed and aligned	MoCT	ETO & MoFA	2				2m	Political goodwill from relevant ministries and stakeholders
	Review and align aviation sector policies with tourism development strategy	Number of aviation sector policies aligned with the tourism development strategy	MoCT	Ministry of Transport, ET, MoFA	5				3m	Cooperation from relevant ministries and countries
	Review and align banking regulations with tourism development strategy	Banking regulations with tourism development strategy reviewed and aligned	MoCT	MOFED	2				2m	Political goodwill from relevant ministries and stakeholders
	Review and align investment policy with tourism development strategy	Investment policy with tourism development strategy reviewed and aligned	MoCT	ETO & EIC	2				2m	Political goodwill from relevant ministries and stakeholders
	Review and align land use and urban policy with tourism development strategies	Policies aligned with tourism development strategies	MoCT	EIC, MoUDHC	Continuous				5m	Cooperation from the relevant regions
	Develop policies to maximise tourism value chain benefits	Policies developed to maximise tourism value chain benefits	MoCT	Private sector and other public stakeholders	2				3m	Cooperation from the relevant stakeholders

Pillar Two: Tourism Product Development

Objectives	Actions	Objectively Verifiable Indicators (OVIs)	Primary Responsibility	Other Organisations Involved	Time Schedule: Key: A=Short Term (1-3yrs) B= Medium Term (4-6yrs) C= Long Term (7-10yrs)				Estimated Cost (ETB)	Assumptions (in addition to availability of funds)
					Duration (yrs)	A	B	C		
Enhancing the appeal of the country's existing tourism products	Profile the quality and standard of existing tourism products	A profile of the quality and standard of existing tourist products undertaken	ETO	MoCT, BoCT, ARCCH, EWCA	1				10m	Goodwill from the relevant stakeholders
	Enhance the appeal of tourist product in the priority areas to increase visitor numbers and length of stay	Number of tourist product improvement programmes undertaken	ETO	MoCT, BoCT, ARCCH, EWCA	Continuous				200m	Goodwill from the relevant stakeholders
Expanding and diversifying the country's tourism product.	Undertake product feasibility to determine potential tourism products to develop in the country	A profile of the potential tourism products undertaken	ETO	MoCT, BoCT, ARCCH, EWCA	1				10m	Goodwill from the relevant stakeholders
	Develop tourism products in regions not having high tourist activity	Number of tourism products developed in regions not having high tourist activity	ETO	MoCT, BoCT, ARCCH, EWCA	Continuous				500m	Availability of funds to carry out feasibility studies, relevant infrastructure, and investment promotion Goodwill from the relevant stakeholders
	Establish strategic tourism product development initiatives within protected areas	Strategic tourism product development initiatives established within protected areas	EWCA	ETO, BoCT	Continuous				500m	Goodwill from the relevant stakeholders
	Prepare development plans and initiatives for the new products	New products development plans prepared	ETO	MoCT, BoCT, ARCCH, EWCA & relevant private sector associations	2				3m	
	Develop niche tourism products to diversify the range of products	Number of niche tourism products development initiatives undertaken	ETO	MoCT, BoCT, ARCCH, EWCA & relevant private sector associations	Continuous				50m	Availability of funds to carry out feasibility studies, Relevant infrastructure, and investment promotion Goodwill from the relevant stakeholders
	Development of new flagship projects	Number of flagship projects developed	ETO	BoCT, MoFA, EWCA and private sector associations	Continuous				1000m	Availability of funds for concept development, relevant lobbying, and investor marketing, with limited government involvement through PPP Availability of potential investors Goodwill from the relevant stakeholders

Develop cross-border tourism product	Identify and develop potential trans-boundary products	Trans-boundary potential products identified	MoCT/ ETO	BoCT, MoFA, EWCA and private sector associations	2				100m	
	Prepare development plans with respective partner countries	Development plan with respective partner country prepared	MoCT/ ETO	MoFA, BoCT and responsible organisation in respective countries	2				100m	Goodwill from the relevant stakeholders and neighbouring countries Support from development partners
Create a framework for tourism products development	Establish national destination development strategy and plan	Destination development plans established	ETO	BoCT, ARCCH,EWCA & private associations	2				25m	Goodwill from the relevant stakeholders
	Develop federal and regional tourism product development schemes	Federal and regional tourism product development schemes developed	ETO	BoCT, ARCCH,EWCA & private associations	2				2m	Goodwill from the relevant stakeholders
	Develop federal and regional tourism accreditation programmes	Federal and regional tourism accreditation programmes developed	ETO	MoCT, BoCT, ARCCH, EWCA	1				2m	Goodwill from the relevant stakeholders
	Develop sustainable tourism product development strategy	Overall sustainable tourism product development strategy development	MoCT	BoCT, ARCCH, EWCA, ETO	1				10m	Goodwill from the relevant stakeholders

Pillar Three: Tourism Marketing, Branding and Promotion

Objectives	Actions	Objectively Verifiable Indicators (OVIs)	Primary Responsibility	Other Organisations Involved	Time Schedule: Key: A=Short Term (1-3yrs) B= Medium Term (4-6yrs) C= Long Term (7-10 yrs)				Estimated Cost (ETB)	Assumptions (in addition to availability of funds)
					Duration (yrs)	A	B	C		
Intensifying the country's appeal in the current target market segments	Market the country and its regions at relevant tourism trade fairs and exhibitions	Number of trade fairs attended to market the country and its regions	ETO	BoCT, media, MoCT, relevant private sector organisations	Continuous				200 m	Cooperation from the regional governments and other relevant stakeholders
	Market and promote the country as part of the wider IGAD tourism region	Number of annual marketing initiatives undertaken jointly with other IGAD member states	ETO	Relevant private sector organisations	Continuous				100m	Relevant legislations passed Cooperation from IGAD member states
	Provide incentives for visitors to extend their stay during major conferences and events	Number of foreign delegates extending their stay after conferences	ETO	BoCT, relevant private sector organisations	Continuous				20mn	Cooperation from the target institutions and delegates
Diversification of the country's tourist market	Expand the country's tourist market to new and emerging source markets	Number of tourist coming from new and emerging source markets	ETO	BoCT, media, relevant private sector organisations	Continuous				200m	Availability of funds
	Develop a strategy to stimulate domestic tourism	Strategy to stimulate domestic demand developed and implemented	ETO	BoCT, MoCT, relevant private sector organisations	2				50m	Goodwill from the relevant stakeholders
Build a national brand that improves and entrenches the image of the country as a tourist destination	Develop and manage the country's destination brand image both at national and regional level	Destination brand developed for the entire country and individual regions	ETO	BoCT, media, relevant private sector organisations	2				10m	Goodwill from the relevant stakeholders
	Use the power of ICT to create and manage destination perception and image	ICT-based strategies being used to create and manage destination perception and image	ETO	MCIT, BoCT, relevant private sector organisations	Continuous				50m	Availability of funds
Disseminate and manage destination information	Create and manage a national DMS	A national DMS created	ETO	MCIT, BoCT, relevant private sector organisations	1				20m	Availability of funds
	Set up a network of Tourist Information Centres (TICs)	Number of Tourist Information Centres (TICs) established and operational	ETO	BoCT, relevant private sector organisations	2				50 m	Availability of funds
	Set up a toll free tourist-specific call centre	A toll-free tourist- specific call centre set up	ETO	BoCT, relevant private sector organisations	1				10m	Availability of funds
	Create a framework for destination awareness among the travel trade	Number of initiatives undertaken to create destination awareness among the travel trade	ETO	BoCT, media, relevant private sector organisations	Continuous				50m	Availability of funds

Establish institutional and strategic frameworks for marketing the country as a tourist destination	Formulate national and regional tourism marketing strategies	Marketing strategic plans developed at national and relevant regional levels	ETO	BoCT, relevant private sector organisations	After every 5yrs				40m	Availability of funds Goodwill from the relevant stakeholders
	Develop an institutional framework to support strategic partnerships in destination marketing	An institutional framework developed to support strategic partnerships in destination marketing	ETO	BoCT, relevant private sector organisations	1				1m	Availability of funds
	Institutionalise the bidding to host major conferences	A multi-stakeholder body to facilitate bidding of mega international events and conferences formed and operational	ETO	BoCT, MoCT, MoFA, media, local, celebs, embassies, Ethiopian Airlines and relevant private sector organisations, etc.	1				100m	Availability of funds to establish and fund the activities of the agency. Goodwill from the relevant stakeholders
	Develop joint marketing strategies with neighbouring countries	Joint marketing strategies with neighbouring countries developed	MoCT/ ETO	MoFA, other government & private institutions	2				50m	Goodwill from the relevant stakeholders and regional states



Tea farming in Ethiopia is robust. It is grown in the highland dense forest regions where the land is fertile.

PHOTO: A man at a tea plantation near Jimma, Ethiopia.



Pillar Four: Investment in Tourism Facilities and Services

Objectives	Actions	Objectively Verifiable Indicators (OVIs)	Primary Responsibility	Other Organisations Involved	Time Schedule: Key: A=Short Term (1-3yrs) B= Medium Term (4-6yrs) C= Long Term (7-10yrs)				Estimated Cost (ETB)	Assumptions
					Duration (yrs)	A	B	C		
Enhance the capacity of the existing tourist services and facilities	Institutionalise the classification of hospitality facilities	A national classification system for hospitality businesses developed and implemented	MoCT	ETO, BoCT, relevant private organisations	1				25m	Goodwill from the relevant stakeholders
	Develop quality management systems for the different sectors in the country's tourism industry	Quality management systems developed and implemented	MoCT	ETO, BoCT, CTTC, other government & private institutions	2				5m	Goodwill from the relevant stakeholders
	Develop an aftercare programme for tourism investments	An aftercare programme for tourism investments developed and implemented	EIC	MoCT, ETO	2				20m	Availability of funds to establish and operationalise the programme
Create a conducive environment to encourage investments in the tourism sector	Creation of a positive and transparent investment climate	Strategies put in place to create a positive and transparent investment climate	EIC	MoCT, BoCT, ETO, regional governments	1				2m	Goodwill from the relevant stakeholders
	Creation of special tourism investment zones	Number of special economic zones targeting the tourism sector established	EIC/ MoCT	ETO, MoUDHC, BoCT, MOFED, regional governments	5				200m	Goodwill from the relevant stakeholders
	Design attractive incentives targeting investors for the tourism sector	Number of tourism-specific incentives established	EIC	ETO, BoCT, regional governments	1				1m	Goodwill from the financial stakeholders
	Encourage lending institutions to support tourism investments	Number of financial institutions providing special credit terms for tourism investment	MoCT/ EIC	ETO, MOFED	2				1m	Goodwill from the financial stakeholders
	Establish a tourism investment fund	A tourism investment fund established	MoCT	MOFED, EIC, donor community, other charitable orgs, regional governments	3				500m	Goodwill from the relevant stakeholders
	Encourage cooperation and an integrated approach to promoting tourism investment in the country	The number of organisations and institutions cooperating in promoting tourism investment	MoCT	ETO, EIC, BoCT, ARCCH, EWCA,MoFA, embassies, Ethiopian Airlines and relevant private organisations	1				3m	Goodwill from the relevant stakeholders
	Encourage regions to create necessary conducive business environment to attract tourism investments	Regional initiatives developed to create conducive business environment for tourism investment	MoCT	EIC, BoCT, ETO, MOFED, regional governments	Continuous				20m	Cooperation from the regional governments Goodwill from the relevant stakeholders

Promote investment opportunities for tourism services and facilities	Organise regular regional, national and international tourism investment forums	Number of regional, national and international tourism investment forums organised	ETO	BoCT, ARCCH, EWCA,MoFA, embassies, Ethiopian Airlines and relevant private organisations	Continuous				100m	Goodwill from the relevant stakeholders
	Establish tourism investment information centres	Establishment of tourism investment information centres established both within the country and in the country's embassies in the target source countries	EIC	MoCT, ETO, MoFA, embassies	2				20m	Goodwill from the relevant stakeholders
	Foster collaboration in the promotion of tourism investment	Number of partners working with MoCT to promote tourism investment	MoCT	EIC, ETO, BoCT, embassies, and relevant private organisations	Continuous				10m	Availability of funds Goodwill from the relevant stakeholders
	Initiate strategies to involve Ethiopia's diaspora in promoting investment in tourism	Strategies to involve Ethiopia's diaspora in promoting investment in tourism is initiated	MoCT	ETO, MoFA, embassies and diaspora associations	2				50m	Availability of funds Goodwill from the relevant stakeholders

Pillar Five: Human Resource Development

Objectives	Actions	Objectively Verifiable Indicators (OVIs)	Primary Responsibility	Other Organisations Involved	Time Schedule: Key: A=Short Term (1-3yrs) B= Medium Term (4-6yrs) C= Long Term (7-10yrs)				Estimated Cost (ETB)	Assumptions (in addition to availability of funds)
					Duration (yrs)	A	B	C		
Address the short-term HR needs for the tourism sector	Promote the development and upgrading of manpower capacity in the country	Number of schemes initiated to upgrade tourism manpower	MoCT	CTTC, TVET, MOE, ETO, BoCT, private organisations	Continuous				10m	Support from relevant industry associations
	Create a framework to facilitate apprenticeships and experiential learning for tourism sector graduates	A framework to facilitate apprenticeships and experiential learning for tourism sector graduates created and implemented	MoCT	CTTC, TVET, MOE, ETO, BoCT, MoFA, private organisations	3				20m	Support from relevant industry associations and international organisations
	Reduce barriers to inward labour mobility to attract external expertise to bridge the short-term HR deficit in the country	Barriers to inward labour mobility to attract external expertise relaxed	MoCT	MoFA, ETO	1				2m	Political goodwill Support from relevant industry associations
Build a long-term supply of globally competitive human resource for the tourism sector	Develop a Strategic Human Resource Development Plan (HRD) for the tourism sector	A strategic HRD plan for the tourism sector developed	MoCT	CTTC, TVET, MOE, ETO, BoCT, private organisations	2				2m	Goodwill from the target stakeholders
	Formulate a National Tourism Training Policy	National Tourism Training Policy formulated	MoCT	CTTC, TVET, MOE, ETO, BoCT, private organisations	2				2m	Goodwill from the target stakeholders
	Upgrade CTTC as a model centre-of-excellence in tourism training in the country	CTTC upgraded as a national centre-of-excellence in tourism training	MoCT	CTTC, TVET, MOE, ETO, BoCT, private organisations	3				500m	
	Develop relevant skills and knowledge for all personnel in the tourism sector businesses	Initiatives undertaken to build capacity of tourism sector employees	MoCT	CTTC, TVET, MOE, ETO, BoCT, private organisations	Continuous				50m	Goodwill from the target stakeholders
	Continuous capacity-building of tourism public officials	A programme for continuous capacity-building of tourism public officials developed and implemented	MoCT	CTTC, TVET, MOE, ETO, BoCT	2				20m	

Pillar Six: Tourism Research and Development

Objectives	Actions	Objectively Verifiable Indicators (OVIs)	Primary Responsibility	Other Organisations Involved	Time Schedule: Key: A=Short Term (1-3yrs) B= Medium Term (4-6yrs) C= Long Term (7-10yrs)				Estimated Cost (ETB)	Assumptions (in addition to availability of funds)
					Duration (yrs)	A	B	C		
Create a framework for tourism research and development within the country	Establish a national tourism research management and documentation centre	A national tourism research management unit and documentation centre is established	MoCT	BoCT, ETO, CTTC, ARCCH, EWCA	2				25mn	
	Establish research units in respective organisations	Research units in respective organisations is established	MoCT	BoCT, ETO, CTTC, EWCA, ARCCH	2				5mn	
	Establish integrated national and regional tourism statistics system	Integrated national and regional tourism statistics system is established	MoCT	BoCT, ETO, other relevant government and private institutions	2				20mn	
	Establish international partnerships to facilitate information exchange and knowledge sharing	Number of international partnerships established	Universities offering tourism programmes	MoCT, Ministry of Education	By 2nd year and continuous				2mn	Cooperation from the relevant institutions

Pillar Seven: Tourist Safety and Security

Objectives	Actions	Objectively Verifiable Indicators (OVIs)	Primary Responsibility	Other Organisations Involved	Time Schedule: Key: A=Short Term (1-3yrs) B= Medium Term (4-6yrs) C= Long Term (7-10yrs)				Estimated Cost (ETB)	Assumptions (in addition to availability of funds)
					Duration (yrs)	A	B	C		
Design and develop a tourism safety and security strategy	Develop a strategy for tourist safety	A national tourism safety and security strategy established and operationalised	MoCT	ETO, EWCA, Ethiopia Federal Police, Ministry of National Defence, BoCT, etc.	2				10m	Cooperation from the relevant stakeholders
	Ensure the national disaster and risk management plan takes tourism into account	A national standard for disaster and risk management established	MoCT	ETO, EWCA, Ethiopia Federal Police, Ministry of National Defence, BoCT, etc.	2				10m	Cooperation from the relevant stakeholders
	Establish a tourist police unit	A tourist police unit established and operational across the country	Ethiopia Federal Police	MoCT, ETO, relevant private sector players	By 2nd year and continuous				100m	Cooperation from the relevant stakeholders
	Establish tourist victim support services	Tourist victim support services available at the regional levels and a coordinating office formed at the national level	MoCT	ETO, EWCA, BoCT	2				10m	Cooperation from the relevant stakeholders

Pillar Eight: Tourism Support Infrastructure and Services

Objectives	Actions	Objectively Verifiable Indicators (OVIs)	Primary Responsibility	Other Organisations Involved	Time Schedule: Key: A=Short Term (1-3yrs) B= Medium Term (4-6yrs) C= Long Term (7-10yrs)				Estimated Cost (ETB)	Assumptions (in addition to availability of funds)
					Duration (yrs)	A	B	C		
Engender tourism industry development focus in national and regional infrastructure development	Initiate strategies to ensure the on-going national and cross-border infrastructure development initiatives support tourism development	Number of tourism development initiatives integrated into infrastructure development projects	MoCT	ETO, BoCT, relevant private and public organisations	Continuous				5m	Cooperation from the relevant government agencies and departments
	Provision of quality and reliable infrastructure within tourism priority areas	Quality and reliable infrastructure within tourism priority areas provided	MoCT	EWCA, ETO, BoCT, relevant public organisations and agencies	Continuous				100m	Cooperation from the relevant government agencies and departments
	Provide effective and appropriate ICT infrastructure in tourism priority areas	Effective and appropriate ICT infrastructure available in tourism priority areas	MCIT	MoCT, ETO, BoCT, relevant private and public organisations	Continuous				50m	Cooperation from the relevant government agencies and departments

Pillar Nine: Conservation and Preservation of Natural and Cultural Resources

Objectives	Actions	Objectively Verifiable Indicators (OVIs)	Primary Responsibility	Other Organisations Involved	Time Schedule: Key: A=Short Term (1-3yrs) B= Medium Term (4-6yrs) C= Long Term (7-10yrs)				Estimated Cost (ETB)	Assumptions (in addition to availability of funds)
					Duration (yrs)	A	B	C		
Enhance the conservation and preservation of natural and cultural resource	Undertake site designations, demarcation and gazetting of natural and cultural heritages	Sites identified and gazetted	ARCCH & EWCA	MoCT, ETO, BoCT, religious institutions, relevant private and public organisations, international partners	Continuous				500m	Goodwill from relevant stakeholders
	Develop management plans and operational guidelines for conservation of natural and cultural resources	Management plans and operational guidelines for conservation of natural and cultural resources are developed	ARCCH & EWCA	MoCT, ETO, BoCT, religious institutions, relevant private and public organisations, international partners	2				50m	Goodwill from relevant stakeholders
	Build community awareness on the importance of conservation and preservation of natural and cultural resources	Community awareness on the importance of conservation initiated	ARCCH & EWCA	MoCT, ETO, BoCT, religious institutions, relevant private and public organisations, international partners	2				20m	Goodwill from relevant stakeholders
	Enhance the capacity of wildlife rangers to protect wildlife in the protected areas	Initiatives to enhance the capacity of wildlife rangers undertaken	EWCA	MoCT	2				5m	Goodwill from relevant stakeholders
	Control the number of tourism facilities in national parks and other protected areas in consideration of their carrying capacity	The carrying capacity of individual protected areas established and enforced	MoCT	EWCA, relevant government departments	2				20m	
	Promote tourism economic activities within the buffer zones of national parks and other protected areas	Number of tourism economic activities developed within the buffer zones of national parks and other protected areas	MoCT	EWCA, ETO, relevant industry associations	Continuous				200m	Availability of funds for studies, minimal infrastructure development in addition to the overall infrastructure budget, and investor marketing
	Foster integrated planning for lake shores	Integrated management plans are developed for lake shores significant to tourism development	EPA	MoCT	2				2m	



There are a total of 11 rock hewn churches in Lalibela. These are Biete Medhani Alem (House of the Saviour of the World), Biete Mariam (House of Mary), Biete Meskel (House of the Cross), Biete Denagel (House of Virgins), Biete Golgotha (House of Golgotha Mikael), Biete Amanuem (House of Emmanuel), Biete Queddus Mercoreus (House of Saint Mercoreos), Biette Abba Libanon (House of Abbot Libanos), Biete Gabriel Raphael (House of Gabriel Raphael), Biette Lehem (House of Holy Bread) and Biete Ghiorgis (House of St. George). The House of Saint George is isolated from the other churches.*

*Names obtained from http://whc.unesco.org/en/list/18 (last accessed 13th November 2015)

PHOTO: Evening view of St. George Church.



	Develop mechanisms to create awareness of and to foster conservation of natural and cultural resources among the industry players	Incentives and necessary regulations are developed to create awareness and foster conservation of natural and cultural resources	MoCT	EWCA, ARCCH, ETO, relevant industry associations	3				10m	Collaboration from industry stakeholders
	Promote sustainable practices in the operation of tourism facilities and activities including green practices and fair trade standards	Initiatives to promote sustainable practices in the operation of tourism facilities and activities are developed	MoCT	EWCA, ARCCH, ETO, relevant industry stakeholders	5				5m	Collaboration from industry stakeholders
	Foster participation of stakeholders in the preparation and follow-up of tourism development plans	Mechanisms put in place to ensure the participation of stakeholders in the preparation and follow-up of tourism development plans	MoCT	EWCA, ARCCH, ETO, relevant industry associations	3				2m	Collaboration from industry stakeholders

Pillar Ten: Tourism Development Financing

Objectives	Actions	Objectively Verifiable Indicators (OVIs)	Primary Responsibility	Other Organisations Involved	Time Schedule:Key: A=Short Term (1-3yrs) B= Medium Term (4-6yrs) C= Long Term (7-10yrs)				Estimated Cost (ETB)	Assumptions (in addition to availability of funds)
					Duration (yrs)	A	B	C		
Institutionalise the mobilisation of financial resources to fund tourism development	Establish a Tourism Development Fund (TDF)	Tourism Development Fund (TDF) established and operational	MoCT	MoFED and international donors, private sector players, regional government	1				20m	Funds to establish and operationalise the TFD Board for 10yrs Goodwill from the relevant stakeholders
Design strategies to mobilise financial resources to fund tourism development under the TDF framework	Establish a Tourism Development Levy (TDL)	Tourism Development Levy (TDL) established	MoCT, TDF Board	MoFED and international donors, private sector players, BoCT	1				2m	Goodwill from the relevant stakeholders
	Develop the relevant tools and instruments for mobilising financial resources from the identified partners and organisations	Relevant tools and instruments prepared to mobilise financial resources from tourism development partners	MoCT, TDF Board	MoFED and international donors, private sector players, BoCT	2				1m	Goodwill from the relevant stakeholders

5.1 Summary of STMP Implementation Road Map

	PHASE	Actions, Activities, and Projects
1	**INSTITUTIONAL AND REGULATORY REFORMS** This is the initial phase that will entail institutional and regulatory reforms with a view to operationalising the implementation of the STMP Specifically, the phase will entail ensuring that each relevant government agency is identified and fully familiarised with the entire STMP The phase will also entail intensive STMP advocacy and stakeholders' mobilisation to ensure it gains broad acceptance and buy-in from all state and non-state actors locally, regionally, and globally; the citizenry; the private sector; development partners and donor agencies among others.	**Preliminaries:** a) STMP implementation inception meeting b) Implementation agencies familiarisation with STMP c) Stakeholders mobilisation and STMP advocacy (i.e. STMP "marketing") **Pillar 1: Policy, Regulatory and Institutional Framework** i) Formulate a legal framework to guide the development of the tourism sector ii) Enhance the institutional capacity of Tourism Transformation Council to spearhead tourism growth and development iii) Strengthen the capacity of regional tourism institutions and that of other relevant institutions to deliver on their respective mandates iv) Harmonise regional tourism development plans with those at national level v) Harmonise the role and functions of national tourism institutions vi) Review and update tourism related policy, regulations and legislation vii) Establish and strengthen existing private companies and trade associations viii) Establishment of destination management organisations in major tourist areas ix) Synchronise Tourism Development policies with those of other sectors x) Review and align entry visa requirements and procedures with tourism development strategy xi) Review and align aviation sector policies with tourism development strategy xii) Review and align banking regulations with tourism development strategy xiii) Review and align investment policy with tourism development strategies xiv) Review and align land use and urban policy with tourism development strategies xv) Develop policies to maximise tourism value chain benefits xvi) Streamline tourism development into broad economic development policies within the other sectors **Pillar 3: Tourism Marketing, Branding and Promotion** i) Develop an institutional framework to support strategic partnerships in destination marketing ii) Institutionalise the bidding to host major conferences **Pillar 4: Investment in Tourism Facilities and Services** i) Institutionalise the classification of hospitality facilities ii) Establish a tourism investment fund iii) Foster collaboration in the promotion of tourism investment **Pillar 5: Human Resource Development** i) Reduce barriers to inward labour mobility to attract external expertise to bridge the short-term HR deficit in the country **Pillar 6: Tourism Research and Development** i) Establish a national tourism research management and documentation centre ii) Establish research units in respective organisations iii) Establish integrated national and regional tourism statistics system **Pillar 7: Tourist Safety and Security** iv) Establish a tourist police unit v) Establish tourist victim support services **Pillar10: Tourism Development Financing** i) Establish a Tourism Development Fund (TDF) ii) Establish a Tourism Development Levy (TDL)

2	**PROJECT WORKPLANS, STRATEGY FORMULATION, AND STUDIES** This phase will see the individual STMP implementing agencies interpreting their individual STMP responsibilities and preparing their work-plans for the 10-year period. The phase will also involve undertaking studies and developing relevant manuals and plans as required under the STMP.	**Pillar 2: Tourism Product Development** i) Profile the quality and standard of existing tourism products ii) Undertake product feasibility to determine the potential tourism products to develop in the country iii) Prepare development plans and initiatives for the new products iv) Prepare development plans with respective partner countries v) Establish national destination development strategy and plan vi) Develop federal and regional tourism product development schemes vii) Develop federal and regional tourism accreditation programmes viii) Develop sustainable tourism product development strategy **Pillar 3: Tourism Marketing, Branding and Promotion** i) Develop a strategy to stimulate domestic tourism ii) Create and manage a national DMS iii) Set up a network of Tourist Information Centres (TICs) iv) Formulate national and regional tourism marketing strategies v) Develop joint marketing strategies with neighbouring countries **Pillar 4: Investment in Tourism Facilities and Services** i) Develop quality management systems for the different sectors in the country's tourism industry ii) Develop an aftercare programme for tourism investments iii) Creation of special tourism investment zones iv) Establish tourism investment information centres **Pillar 5: Human Resource Development** i) Create a framework to facilitate apprenticeships and experiential learning for tourism sector graduates ii) Develop a Strategic Human Resource Development Plan for the tourism sector iii) Formulate a National Tourism Training Policy **Pillar 7: Tourist Safety and Security** iv) Develop a strategy for tourist safety v) Ensure the national disaster and risk management plan take tourism into account **Pillar 8: Tourism Support Infrastructure and Services** vi) Initiate strategies to ensure the on-going national and cross-border infrastructure development initiatives support tourism development **Pillar 9: Conservation and Preservation of Natural and Cultural Resources** i) Undertake site designations, demarcation and gazetting of natural and cultural heritages ii) Develop management plans and operational guidelines for conservation of natural and cultural resources iii) Develop integrated area plans for lake shores iv) Develop mechanisms to create awareness on, and foster conservation of natural and cultural resources among the industry players **Pillar 10: Tourism Development Financing** i) Develop the relevant tools and instruments for mobilising financial resources from the identified partners and organisations
3	**THE PROJECTS PHASE**	This phase, running throughout the STMP period, will entail operationalisation of the institutional reforms, implementation of the workplans and studies undertaken in Phase 2 above and other direct projects that may not necessarily require prerequisite studies The different projects will be phased as per the STMP time schedules

5.2 STMP Financing Requirements

The STMP identifies 10 Strategic Pillars to be undertaken in the development of Ethiopia's tourism sector arising from nationwide tourism stakeholder consultation and elaborate benchmark studies on the best practices under each pillar. In total, the implementation of the STMP 2015-2025 will cost a total of ETB 5.306 billion distributed as below (Table 5.1). Importantly, additional investments planned for transport and other infrastructure will provide further significant benefits to the tourism industry. As such, for those activities which fall within an existing budgetary mandate (for example infrastructure development, national defence, etc.), any cost estimations are only provided for the foreseeable additional expenses and not the cost of the entire mandate.

Table 5.1: Indicative Cost Estimates of Implementing the Ethiopia STMP (2015-2025)

Strategic Pillar	Estimated Cost (ETB Mn)
1.0 Policy, Regulatory and Institutional Framework	166
2.0 Tourism Product Development	1602
3.0 Tourism Marketing, Branding and Promotion	951
4.0 Investment in Tourism Facilities and Services	957
5.0 Human Resource Development	606
6.0 Tourism Research and Development	52
7.0 Tourist Safety and Security	130
8.0 Tourism Support Infrastructure and Services	155
9.0 Conservation and Preservation of Natural and Cultural Resources	814
10.0 Tourism Development Financing	23
Total	**5,466**

5.3 STMP Implementation Monitoring and Evaluation Plan

The Tourism Transformation Council (TTC) through its different Working Committees, and working in close liaison with MoCT will take the lead in monitoring the implementation of the Sustainable Tourism Master Plan. As a starting point, each lead agency involved in the implementation of the STMP will be expected to formulate a Plan of Action (PoA) detailing how the actions falling under its mandate are to be implemented, indicating the relevant collaborating agencies, and prepared in line with the proposed time lines and budget. These individual PoA will form monitoring and evaluation tools for each lead agency.

Ministry of Culture

Each TTC Working Committee will produce an annual report describing progress made against milestones and performance indicators for each activity listed in the action plans for the specific year. Comprehensive implementation report will be prepared and presented by the TTC working committee to the broad tourism stakeholders at the end of each of the three implementation cycles (end of Year 2 and half, Year 5, 7 and Year 10) through a stakeholders' forum. This review process is important because the actual timeline and costs for the activities may differ from the projections, underscoring the need for flexible timelines and cost estimations. MoCT through its planning department will facilitate technical assistance to support the review process and ensure wide distribution of all findings.

Table 5.2: STMP Monitoring and Evaluation Plan

	Nature of M&E	Time Line	Expected Output	Responsibility
1	Annual Reviews	End of each STMP implementation year	An annual report of the implementation progress for the year.	TTC Working Committees
2	STMP Implementation Cycle Reviews	End of each implementation cycle (end of year 2017, 2020, 2025)	End of implementation cycle report providing achievements, challenges, way forward, and plan for the next cycle. Report to be presented to stakeholders through a workshop to enable their input.	TTC Board
3	Final Evaluation	End of the STMP Schedule (end of year 2025)	Final STMP Evaluation report providing achievements realised, challenges faced, lessons learnt, and the way forward into the next STMP. Report to be presented to stakeholders through a workshop to enable their input.	TTC Board

5.4 TOURISM INDUSTRY GROWTH PROJECTIONS

In line with the GTP2 projections, the STMP has set a high target of 5 million international visitors by 2025. Based on this high growth scenario, receipts from international arrivals is projected to increase from a baseline of ETB 13.101 billion in 2013 to ETB 180 billion in 2025, with the corresponding number of tourism-related jobs rising from 985,500 to 4.8 million. Table 2.20 below summarises the growth projections to be realised from successful implementation of this Master Plan including a summary of growth drivers.

Table 5.3: Ethiopia Tourism Growth Projections by 2025

S/No	Indicator	2013	2017	2020	2025
			Total	Total	Total
1	International visitor numbers	596,000*	1,192,000	2,575,000	4,950,000
2	Total receipts (ETB bn)	14	58	112	180
3	Direct contribution to the country's GDP in ETB mn	36	95	181	325
4	Indirect and induced contribution to GDP in ETB mn	52	250	485	755
5	The total contribution of Travel & Tourism to GDP (including wider effects from investment, the supply chain and induced income impacts) in ETB mn	88	345	672	1080
6	Total direct employment (millions)	1.0	1.85	2.5	4.8

*2012 Arrivals (UNWTO, 2014)

Table 5.4: Summary of Ethiopia Tourism Growth Drivers towards (2015-2025)

S/No	Indicator	Projections per STMP Time- Schedule Horizons			Growth Drivers Proposed by The STMP
		ST	MT	LT	
1	Increased investment in the sector: a) FDI	50%	75%	75%	a) Improved investment climate including: i. Improved business regulations ii. Availability of qualified manpower iii. Destination safety iv. Credit availability v. Favourable land policy vi. Improved monetary and banking policy vii. Government incentives b) Increased investor promotion initiatives c) New flagship projects d) Improved support infrastructure e) Increased visitor numbers: domestic, regional and international f) Improved destination image g) General government prioritisation of the sector
	b) Domestic investment (including CBTs)	25%	50%	50%	a) Improved investment climate including: i. Relaxed foreign currency policy ii. Improved business regulations iii. Availability of qualified manpower iv. Credit availability v. Government incentives b) New flagship projects c) Increased visitor numbers: domestic, regional and international d) Increased number of meetings, mega events and conferences e) General government prioritisation of the sector
2	Increased earning potential of the current investments	50%	75%	50%	a) Increased average guest spend and length of stay b) Improved investment climate including: i. Relaxed foreign currency policy ii. Improved business regulations iii. Availability of qualified manpower iv. Credit availability v. Government incentives c) Increased number of meetings, mega events and conferences d) Increased visitor numbers: domestic, regional and international e) Improved service level
3	Estimated average investment growth (S/No 1 +S/No 2)	42%	67%	58%	
4	Increased quantity of employment for locals	25%	50%	40%	a) Growth in investments b) Improved qualification and competencies c) Fair trade business practices
5	Increased visitor numbers	50%	75%	50%	a) Increased destination promotion b) Improved destination accessibility c) Ability to combine the destination with other regional destinations as a result of single visa arrangements d) Product diversification e) Focus on new source markets f) Improved destination product quality g) Destination safety
6	Increased average visitor spend	10%	5%	5%	a) Improved destination product quality b) Product diversification c) Increased destination promotion d) Ease of payments using credit cards
7	Indirect economic impacts resulting from increased investment in other sectors linked with the tourism supply chain including SMEs	50%	75%	75%	Increase in tourism investments Increased tourist numbers providing market for the forward linked sectors

5.5 Institutional Framework for STMP Implementation

To ensure the successful and efficient implementation of the country's tourism development goals and strategies, a clearly defined institutional framework comprising of key institutions and their specific roles is required. Further, such an institutional framework would require clear lines of reporting and collaborations between individual national institutions; national and regional institutions; and different intra and inter regional institutions. This is essential to avoid any overlaps in roles that may result in role conflicts and omissions.

Table 5.5: Institutional Framework for STMP Implementation

INSTITUTION	FUNCTIONS	
Tourism Transformation Council	i.	Overall destination leadership in destination development policies, programmes and initiatives (including the implementation of this Master Plan)
	ii.	Setting directions for the country's tourism development and marketing initiatives
	iii.	Overall coordination of inter-and intra-sectoral policies, programmes and initiatives to remove major impediments and challenges to development in the tourism industry and ensure their implementation
	iv.	Providing the necessary directions to assure collaboration and synergy among various institutions for the successful implementation of tourism development and marketing initiatives
MoCT	i.	Tourism policy and planning and implementation including regulation of tourism activities and services countrywide in accordance with the national tourism strategy
	ii.	Tourism area development planning
	iii.	Develop and implement, in consultation with relevant stakeholders, criteria for standardisation and classification of tourism facilities and services
	iv.	Tourism development coordination
	v.	Tourism industry advocacy and liaison with other relevant institutions including national and regional policy makers, national treasury, infrastructure development agencies, missions abroad, among others
	vi.	Tourism investment promotion policy
	vii.	Register, licence and grade all tourism and tourist-related activities and services
	viii.	Develop and implement a code of practice/ethics for the tourism sector
HR Policy and Development Unit (within MoCT)*	i.	Tourism HR policy, planning and development
	ii.	In consultation with the relevant institutions responsible for matters relating to education, develop and regulate tourism and hospitality curriculum, examination and certification
	iii.	Vet and recommend expatriates seeking employment in the tourism and hospitality sector
	iv.	Develop and implement industry CPD policy
	v.	Establishment of a tourism training centre-of-excellence as a model institution
	vi.	Vet, authorise, and monitor private and public tourism training institutions
Tourism Research Unit within MoCT*	i.	Determine, in consultation with lead agencies, the carrying capacities of the various tourism destinations and conservation needs and priorities
	ii.	Generation of relevant industry statistics
	iii.	Provide information as a basis for tourism development planning and decision making
	iv.	Provide information on early warning, disaster management, impacts and mitigation and adaptive strategies to climate change
	v.	Research and advise on sustainable tourism models and other emerging areas of tourism development
	vi.	Grant research permits to conduct research in the country's tourism sector
	vii.	In collaboration with relevant lead agencies and stakeholders, establish a comprehensive tourism database for the tourism sector

Ethiopia Investment Commission	i.	Undertake destination investment promotion
	ii.	Establish and implement relevant investment incentives for the tourism sector
	iii.	Provide advice and linkages with affordable credit facilities to investors or entrepreneurs in the tourism sector including small and medium and community based enterprises for development, expansion and maintenance of tourism activities and services
	iv.	Provide investment advisory services for the tourism sector.
	v.	Promote appropriate models of community and private sector involvement in strategic tourism investments including the PPP
Ethiopia Tourism Organisation	i.	Undertake tourism product development in line with national and regional vision
	ii.	Develop, implement and coordinate a national tourism marketing strategy
	iii.	Support the development and implementation of regional tourism marketing strategies
	iv.	Undertake tourism market research in conjunction with the Tourism Research Institute and advise tourism stakeholders accordingly
	v.	Spearhead the establishment of and monitor city/ regional convention and visitor bureaus (CVBs)
	vi.	Spearhead the marketing of the country's MICE product
	vii.	Establishment of Tourist Information Centres
Tourism Development Fund *	i.	Mobilise funds for tourism development
	ii.	Formulation and administration of the tourism training and development levy policy
	iii.	Finance the development of tourism products and services including strategic investments
	iv.	Finance the marketing of the country as a tourist destination through the Destination Marketing body;
	v.	Finance the activities of the tourist protection service
	vi.	Finance the tourism research
	vii.	Finance tourism training and capacity development activities including the National Tourism Training centre-of-excellence.
Tourist Police*	A specialised multilingual police service under the supervision of the National Police Service dedicated to tourist safety. Besides the policing training, possessing competencies in such areas as disaster and emergency management, psychology, cross-cultural skills, and people relations skills. Responsible for:	
	i.	Ensuring onsite and enroute tourist safety and protection
	ii.	Establishing and operating multilingual emergency toll free call centres
	iii.	Establishing tourist emergency evacuation services
Convention and Visitor Bureaus (CVBs)*	A forum for all tourism industry stakeholders at regional/city level including private sector, public sector, security agencies, among others. Key roles:	
	i.	Promotion of the region as a convention destination
	ii.	Monitoring and regulating relevant tourism operations standards at the local level
	iii.	Ensuring destination appeal including cleanliness, street lighting, accessibility, among others
	iv.	Monitoring tourist safety and security including destination appeal
	v.	Liaison with the relevant institutions in pursuit of the above functions
Ethiopia Wildlife Conservation Agency	Management of wildlife resources to facilitate access by tourism sector including a) Provision of access roads b) Establishment of appropriate entrance fees c) Provision of adequate signage d) Provision of onsite visitor security and emergency services etc.	
	Regulation of responsible Tourism utilisation of the wildlife resources including a) Determining resource Carrying Capacity b) Determination of the appropriate tourist development zones c) Setting guidelines and codes of conduct d) Regulating and monitoring establishment and operations of parks, reserves and conservancies	



Ethiopia finds herself in a unique place as one of the few countries in Africa with the most World Heritage Sites.

PHOTO: Fasilides Castle in Gondar, Ethiopia.

Authority for Research and Conservation of Cultural Heritage (ARCCH)	Management of Cultural and Heritage resources to facilitate access by tourism sector including: a) Provision of access roads b) Establishment of appropriate entrance fees c) Provision of adequate signage d) Provision of onsite visitor security e) Provision of onsite interpretation services
	Regulation of responsible Tourism utilisation of the cultural and heritage resources including a) Visitor controls and management b) Establishment of the appropriate codes of ethics for visitors and guides
	Ensure host community benefits from tourism utilisation of cultural and heritage resources available within their locality
OTHER important institutions	• Governments of the respective regional governments • Ethiopian Investment Commission • Ethiopian Civil Aviation Authority • Environment Protection Authority • Ministry of Health • Ministry of Foreign Affairs • Ministry of Finance and Economic Development • Ethiopian Roads Authority • Universities

*These institutions and units are to be established.
The regional offices under each of the above institutions and agencies will also play their primary and delegated responsibilities.

6 BIBLIOGRAPHY

Amhra NRS Bureau of Culture Tourism & Parks Development (2009). Sustainable Tourism Networking Development Plan for North Gondar Administration Zone

Amhra NRS Bureau of Culture Tourism & Parks Development (2009).Sustainable Tourism Networking Development Plan for North Gondar Administration Zone

Amhra NRS Bureau of Culture Tourism & Parks Development (2011). Draft Lake Tana Tourist Destinations Networking Development Plan

Amhra NRS Bureau of Culture Tourism & Parks Development (n.d). Tourism Marketing Strategy of Amhara National Regional State (2011-2015)

Amhra NRS Bureau of Culture Tourism & Parks Development (n.d). Tourism Marketing Strategy of Amhara National Regional State (2011-2015)

Amhra NRS Bureau of Culture Tourism & Parks Development, (2006). Development of Alternative Livelihoods for the Population of the Simien Mountains National Park, Ethiopia

APEC International Centre for Sustainable Tourism (AICST) (2006). Tourism Risk Management: An Authoritative Guide to Managing Crises in Tourism

Australia Tourism Act, 1994 in: http://www.tourism.australia.com/content/About%20Us/tourism_australia_act_2004.pdf

Australian Trade commission, Tourism Industry Regional Development Fund (TIRF) Grants Programme available in: http://www.austrade.gov.au/Tourism/Tourism-and-business/previous-grants-programmes

Berihu Assefa (May 2009). Business Process Reengineering in Ethiopia

Dieke, P.U.C. (2009). Developing Tourism in Africa: Issues for policy consideration. UNPAN publication. Accessed through http://unpan1.un.org/intradoc/groups/public/documents/IDEP/UNPAN002586.pdf

EAC (2010). EAC Development Strategy 2006-2010. East African Community. Accessed through http://www.eac.int/advisory-opinions/doc_details/159-eac-development-strategy-2006-2010.html

EIU (2009) Global intelligence and analysis. Economist Intelligence Unit http://www.eiu.com/public/

Enhancing private sector and community engagement in tourism services in Ethiopia, by the World Bank/ODI, 2009

Ethiopia Wildlife Conservation Authority (EWCA) (October 2013) Development of a Marketing Strategy for Wildlife Tourism in Ethiopia

Ethiopian Investment Agency (2013). Invest in Ethiopia. An investment guide to Ethiopia *Opportunities and Conditions 2013*

EWCA and UNDP (October, 2013). Development of a Marketing Strategy for Wildlife Tourism in Ethiopia

The Federal Democratic Republic of Ethiopia (2009). Higher Education Proclamation. Ethiopia Government

The Federal Democratic Republic of Ethiopia (2010). Growth and Transformation Plan 2010/2011-2014/2015. Ethiopia Government

The Federal Democratic Republic of Ethiopia (2014). Ethiopia Tourism Organisation Proclamation

Federal Democratic Republic of Ethiopia, Ministry of Health (2005). *National Hygiene and Sanitation Strategy*

The Federal Democratic Republic of Ethiopia, Ministry of Finance and Economic Development (MoFED) (2010). *Growth and Transformation Plan (GTP) 2010/11-2014/15*

Gollub, J., Hosier, A. and Woo, G. (2003). Leakages and linkages in the tourism sector: using cluster-based strategy to minimise tourism leakages. In WTO/OMT *Studies in relation to Trade Negotiations on tourism services. Leakages and linkages. Competition problems, Sustainability Standards.* (Madrid: WTO/OMT)

Government of India, Ministry of Tourism. Product/Infrastructure Development for Destinations and Circuits. Available in: http://tourism.gov.in/TourismDivision/AboutScheme.aspx?Name=Tourism%20Infrastructure%20Development&CID=1&INO=2

ICCA (2012). Statistics Report 2002-2011. ICCA, Amsterdam, The Netherlands

Institute of Biodiversity and the Oromia Bureau of Agriculture & Rural Development (2007). Bale Mountains National Park General Management Plan 2007–2017

ITU (2013). Fixed (wired) Broadband Subscription 2002-2012. http://www.itu.int/en/ITU-D/Statistics/Pages/stat/default.aspx Visited June 2013

Kenya, Government of (2009). Vision 2030: A Globally competitive and prosperous Kenya. Ministry of State for Planning, National Development and Vision 2030. Accessed through http:// www.planning.go.ke/

Malaysia Government (2010). International Tourist Arrivals and Domestic Tourism 2008-2009. Ministry of Tourism, Malaysia

Meredith Wray , et al (2010). Sustainable Regional Tourism Destinations: Best practice for management, development and marketing. ISBNs: 9781921658310 (pbk.) 9781921658815 (pdf)

Ministry of Urban Development and Construction, Ethiopia (September, 2011(. Urban Tourism And Heritage Planning Manual

Mitchel, J. and Coles, C. (2009). Enhancing private sector and community engagement in tourism services in Ethiopia. London: Overseas Development Institute

MoCT (2009). Tourism Development Policy. Ethiopia Government

MoCT (2010). Tourism Statistics Bulletin 2006-2008. Ethiopia Government

MoCT and UNDP (June, 2012). Sustainable Development of the Protected Area System of Ethiopia (SDPASE)

ODI (2006). Tourism business and the local economy: increasing impact through a linkages approach. *ODI Briefing Paper March 2006*, in http://www.odi.org.uk/resources/download/1944.pdf

Republic of Kenya, Tourism Act, 2011, www.tourism.go.ke/

Republic of Kenya. Laws of Kenya: The Kenya Tourist Development Corporation Act, Chapter 382, Revised in 1988. Available in www.ktdc.co.ke/downloads/KTDC%20ACT.pdf

Republic of South Africa, Tourism Act, 2014 in: http://www.tourism.gov.za/AboutNDT/Publications/tourism%20act%20no%203%20of%202014.pdf

The USAID/ WTO Accession Plus Project (May 2010). Donor Inventory for Ethiopia for Private Sector Development & Trade

Tourism Ethiopia, (2011) Tourism Status of Ethiopia. Accessed through: http://www.tourismethiopia.org/pages/ethiopia.asp

UNCTAD (2007). *The contribution of tourism to development*. UNCTAD, Geneva. In http://www.unctad.org/sections/wcmu/docs/cii2nd2010mashayekhi_item5_en.pdf

UNCTAD (2008). Foreign Direct Investment in Africa: The roles of natural resources, market size, government policy, institutions and political stability. United Nations Conference on Trade and Development

UNCTAD (2011) Report on the Implementation of the Investment Policy Review: Ethiopia. New York and Geneva, United Nations

United Nations Economic Commission for Africa (2013). Sustainable Tourism Master Plan for the Inter-Governmental Authority on Development (IGAD) region 2013-2023

UNWTO (2004). Tourism and Poverty Alleviation: recommendations for action. *in http://www.unohrlls.org/UserFiles/File/MTR/Agency_inputs/worldtourisminput.pdf)*

UNWTO (2010). International Recommendations for Tourism Statistics. United Nations, New York

UNWTO (2012). Tourism Highlights 2011 Edition. UNWTO, Madrid Spain

UNWTO (2014). Tourism Highlights 2013 Edition. UNWTO, Madrid Spain

Wilde, S.J. and Cox, C. (2008). Linking destination competitiveness and destination development: findings from a mature Australian tourism destination. *Proceedings of the Travel and Tourism Research Association (TTRA) European Chapter Conference -Competition in Tourism: Business and Destination Perspectives, Helsinki, Finland*, pp. 467-478

World Bank (2006). Ethiopia: Towards a Strategy for Pro-poor Tourism Development. The World Bank, Washington, USA

World Bank (2009). Enhancing private sector and community engagement in tourism services in Ethiopia. ODI, UK

World Bank (2010). World Development Indicators. The World Bank, Washington, USA

World Bank (2011a). African Development Indicators. The World Bank, Washington, USA

World Bank (2011b). Special Economic Zones: Progress, Emerging Challenges, and Future Directions, (Ed.), World Bank, Washington D.C.

World Bank (2012). Ethiopia's Tourism Sector: Strategic Paths to Competitiveness and Job Creation. The World Bank, Washington, USA

World Bank (2013). Doing Business Report. The World Bank, Washington, USA

World Bank (June 2009). Toward the Competitive Frontier – Strategies for Improving Ethiopia's Investment Climate

World Bank (June, 2006). Ethiopia, In Makeda's Footsteps: Towards a Strategy for Pro-Poor Tourism Development

World Bank and FDRE (May, 2007). Aksum: Tourism Development Strategy & Proposed Implementation Actions conducted as part of the Ethiopian Cultural Heritage Project: Site Planning and Conservation Activities in Gondar & Aksum

World Bank and FDRE (May, 2007). Strategy for Tourism Development in Gondar conducted as part of the *Ethiopian Cultural Heritage Project: Site Planning and Conservation Activities in Gondar & Aksum*

World Bank and MoCT (October, 2013). Ethiopia's Tourism Sector: Strategic Paths to Competitiveness and Job Creation

World Bank/ODI (2009) Enhancing private sector and community engagement in tourism services in Ethiopia (draft report), 2009. In: http://www.odi.org.uk/sites/odi.org.uk/files/odi-assets/publications-opinion-files/5848.pdf

World Economic Forum (2013). Travel and Tourism Competitive Index Report. Geneva, Switzerland

WTTC (2013). Travel and Tourism Economic Impacts: Country Reports 2013. London, UK

WTTC (2014). Travel and Tourism Impacts: Country Reports Ethiopia (2014). UK

www.ghana.travel/services/tourism_levy

http://www.webatelier.net/reports

www.magicalkenya.com

www.visitaustralia.com

www.visitbritain.com

RELEVANT PROCLAMATIONS

1. **Proclamation No. 691/2010**
   A proclamation to provide for the definition of powers and duties of the executive organs of the Federal Democratic Republic of Ethiopia

2. **Proclamation No. 541/2007**
   Development Conservation and Utilisation of Wildlife Proclamation

3. **Proclamation No. 209/2000**
   Research and Conservation of Cultural Heritage Proclamation

4. **Proclamation Number 471/2005**
   Empowers the Ministry of Culture and Tourism to consolidate the fragmented activities and ensure coordination of efforts being made by government, the private sector, communities at the tourism destinations and civic organisations, and to create a conducive environment for these entities to be able to discharge their respective responsibilities appropriately

5. **Proclamation No. 574/2008**
   Urban Planning Proclamation

6. **Proclamation No. 575/2008**
   A proclamation to provide for the establishment of the Ethiopian Wildlife Development and Conservation Authority

7. **Proclamation No. 295/2002**
   A proclamation to establishing the Ethiopia Environment Protection Authority (EPA) as an environmental regulatory and monitoring body

7 GLOSSARY OF KEY TERMS

Adventure tourism
Exploration or travel to remote and exotic areas that gains excitement by allowing participants to step outside of their comfort zone; may include activities such as mountaineering, trekking, bungee jumping, mountain biking, rafting and rock climbing.

Agritourism
Any agriculturally-based operation or activity that brings visitors to a farm or ranch; includes activities such as buying produce directly from a farm stand, navigating a cornfield, picking fruit, feeding animals, or staying at a bed and breakfast on a farm.

Business visitor
A business visitor is a visitor whose main purpose for a tourism trip corresponds to the business and professional category.

Community-based tourism
A form of tourism in which a significant number of local people have substantial control over and involvement in, with a high proportion of benefits remaining within the local economy. Members of the community, even those who are not directly involved, often gain some form of benefit (e.g. through community funds). Community based tourism can create jobs both directly and indirectly as well as additional income for the local population, provide further training opportunities (for example, language, service, restaurant and hotel business and guiding) for community members. It strengthens the social and organisational structure within the community and can help strengthen cultural identity and preserve cultural heritage.

Country of residence
The country of residence of a household is determined according to the centre of predominant economic interest of its members. If a person resides (or intends to reside) for more than one year in a given country and has there his/her centre of economic interest (for example, where the predominant amount of time is spent), he/she is considered as a resident of this country.

Destination (main destination) of a trip
The main destination of a tourism trip is defined as the place visited that is central to the decision to take the trip. See also purpose of a tourism trip.

Destination competitiveness
A destination's ability to create and integrate value-added products that sustain its resources while maintaining market position relative to competitors (Hassan (2000)). Destination competitiveness relates to two components of a tourist destination: (1) comparative advantages- inherited resources both natural and cultural, and (2) competitive advantages- the additional created assets such as hotels, attractions, transport network, the quality of management, human capital and government policies, etc.

Direct contribution to employment
The number of direct jobs within the travel & tourism industry.

Direct contribution to GDP
GDP generated by industries that deal directly with tourists, including hotels, travel agents, airlines and other passenger transport services, as well as the activities of restaurant and leisure industries that deal directly with tourists. It is equivalent to total internal travel & tourism spending within a country less the purchases made by those industries (including imports).

Domestic tourism
Comprises the activities of a resident visitor within the country of reference, either as part of a domestic tourism trip or part of an outbound tourism trip. Domestic travel & tourism spending: spending within a country by that country's residents for both business and leisure trips. Multi-use consumer durables are not included since they are not purchased solely for tourism purposes.

Eco-tourism
The International Eco-tourism Society defines eco-tourism as "responsible travel to natural areas that conserves the environment and improves the well-being of local people." The society states that eco-tourism is about uniting conservation, communities and sustainable travel. This means that those who implement and participate in eco-tourism activities should adhere to the following eco-tourism principles: (i) minimise impact; (ii) build environmental and cultural awareness and respect; (iii) provide positive experiences for both visitors and hosts; (iv) provide direct financial benefits for conservation; (v) provide financial benefits and empowerment for local people; and (vi) raise sensitivity to the host country's political, environmental, and social climate.

Employment in tourism industries
Employment in tourism industries may be measured as a count of the persons employed in tourism industries in any of their jobs, as a count of the persons employed in tourism industries in their main job, as a count of the jobs in tourism industries, or as full-time equivalent figures.

Excursionist (or same-day visitor)
A visitor (domestic, inbound or outbound) is classified as a same-day visitor (or excursionist) if his/her trip does not include an overnight stay.

Forms of tourism
There are three basic forms of tourism: domestic tourism, inbound tourism, and outbound tourism. These can be combined in various ways to derive the following additional forms of tourism: internal tourism, national tourism and international tourism.

Heritage tourism
A subset of cultural tourism oriented towards understanding and appreciating the heritage of a destination; focuses on visiting historical or industrial sites (e.g., old canals, railways, battlegrounds, etc.); also attributed to dramatised historical events; concerned with a culture's tangible elements and intangible dimensions

Inbound tourism
Comprises the activities of a non-resident visitor within the country of reference on an inbound tourism trip.

Internal tourism
Comprises domestic tourism plus inbound tourism, that is to say, the activities of resident and non-resident visitors within the country of reference as part of domestic or international tourism trips.

International tourism
International tourism comprises inbound tourism plus outbound tourism, that is to say, the activities of resident visitors outside the country of reference, either as part of domestic or outbound tourism trips and the activities of non-resident visitors within the country of reference on inbound tourism trips.

Leisure travel & tourism spending
Spending on leisure travel within a country by residents and international visitors.

Mass tourism
The act of visiting a destination with large numbers of people at one time; industry practices that cater to larger volumes of visitors.

Meetings industry
To highlight purposes relevant to the meetings industry, if a trip's main purpose is business/professional, it can further subdivided into "attending meetings, conferences or congresses, trade fairs and exhibitions" and "other business and professional purposes".

MICE tourism
Groups brought together for a particular purpose (e.g., meetings, incentives, conferences and exhibitions), usually planned well in advance.

National tourism
Comprises domestic tourism plus outbound tourism, that is to say, the activities of resident visitors within and outside the country of reference, either as part of domestic or outbound tourism trips.

Nature-based tourism
Leisure travel undertaken largely or solely to enjoy natural attractions and engage in a variety of outdoor activities (e.g., bird watching, hiking, fishing and beachcombing); a subset of nature-based tourism.

Outbound tourism
Comprises the activities of a resident visitor outside the country of reference, either as part of an outbound tourism trip or as part of a domestic tourism trip.

Place of usual residence
The place of usual residence is the geographical place where the enumerated person usually resides and is defined by the location of his/her principal dwelling (principles and recommendations for population and housing censuses of the United Nations).

Sustainable tourism
"Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities" (UNWTO, 2002). Thus sustainable tourism should make optimal use of environmental resources, respect the socio-cultural authenticity of host communities, and provide viable, long-term socio-economic benefits to all.

Total contribution to employment
The number of jobs generated directly in the travel & tourism sector plus the indirect and induced contributions (see below).

Total contribution to GDP
GDP generated directly by the travel & tourism sector plus its indirect and induced impacts.

Tourism expenditure
Tourism expenditure refers to the amount paid for the acquisition of consumption goods and services, as well as valuables, for own use or to give away, for and during tourism trips.

Tourism industries
Tourism industries (also referred to as tourism activities) are the activities that typically produce tourism characteristic products.

Tourism Satellite Account (TSA)
TSA can be seen as a set of 10 summary tables, each with their underlying data and representing a different aspect of the economic data relative to tourism: inbound, domestic tourism and outbound tourism expenditure, internal tourism expenditure, production accounts of tourism industries, the gross value added (GVA) and gross domestic product (GDP) attributable to tourism demand, employment, investment, government consumption, and non-monetary indicators.

Tourism sector
The tourism sector, as contemplated in the TSA, is the cluster of production units in different industries that provide consumption goods and services demanded by visitors. Such industries are called tourism industries because visitor acquisition represents such a significant share of their supply that, in the absence of visitors, their production of these would cease to exist in meaningful quantity.

Tourism value chain
The chain of activities or production units in different industries that provide goods and services demanded by visitors.

Tourist (or overnight visitor)
A visitor (domestic, inbound or outbound) is classified as a tourist (or overnight visitor), if his/her trip includes an overnight stay.

Travel & tourism
Relates to the activity of travellers on trips outside their usual environment with duration of less than one year. Economic activity related to all aspects of such trips is measured within the research.

Urban tourism
Travelling or vacationing in inner-city and other urban areas that provide a range of attractions (e.g., tourist-historic urban cores, museums, urban waterfronts, theme parks, and specialised precincts).

Visitor exports
Spending within the country by international tourists for both business and leisure trips, including spending on transport, but excluding international spending on education.

Visitor
A visitor is a traveller taking a trip to a destination outside his/her usual environment, for less than a year, for any main purpose (business, leisure or other personal purpose) other than to be employed by a resident entity in the country or place visited. A visitor (domestic, inbound or outbound) is classified as a tourist (or overnight visitor), if his/her trip includes an overnight stay, or as a same-day visitor, otherwise.

Wildlife tourism
Watching wild animals in their natural habitat; closely aligned to eco-tourism and sustainable tourism.

8 APPENDICES

1.0 Methodological Note

The terms of reference for the Sustainable Tourism Master Plan development project, as laid down in the Letter of Agreement between the UNECA Sub-Regional Office for EA and the Ministry of Culture and Tourism, were to:

1. Outline the importance of tourism development to Ethiopia.
2. Analyse in detail the prevailing scenario of tourism development in the country with a view to identifying challenges and opportunities.
3. Identify appropriate strategies and actions that can enhance the competitiveness of the country as a global tourism destination.
4. Provide a detailed roadmap for the implementation of the strategies and actions of the STMP.

The broader strategic direction of the GTP [28] for the tourism sector and the more specific aims and objectives of the NTDP provided the basis for the development of this national Sustainable Tourism Master Plan (STMP). The STMP integrates the guiding principles of the NTPD which are informed by: Respect for pluralism; Guaranteeing community participation and benefits; Instituting management transparency and responsibility; and Creating partnerships. The Master Plan is further informed by broader recommendations of the IGAD STMP and the principles of comprehensive tourism planning.

Generally, the STMP adopts an approach to tourism planning whereby the framework for decision-making links the industry to other economic sectors and one that takes on board the views of relevant stakeholders including government, private sector, academia, civil society and local communities. While the STMP is designed to be goal-oriented in nature as opposed to being reactionary, it is also designed to accommodate changes in both the internal and external tourism environment.

The STMP development was guided by the following underlying principles:

i. Tourism planning should adopt a systems approach to development focusing not only on the development processes but also on the necessary inputs and outputs.

ii. Tourism development should be sustainable providing equity for both inter-generational, (whereby the current exploitation of tourism resources should not compromise the ability of future generations), and intra-generational, taking into account issues relating to enhancing social justice and poverty alleviation.

iii. The STMP should enhance the competitiveness of the country as a tourist destination by building on the existing unique aspects of each individual region that should complement the country's overall image and creation of synergies in areas of common tourism interest.

iv. The STMP should provide strategies that would reduce the level of tourism economic leakages while enhancing tourism economic linkages and multiplier effect through sound Value Chain development policies.

v. The STMP should provide strategies in line with the wider national, regional, continental and international development initiatives and economic development plans.

vi. Tourism development should be guided by sound research. The STMP should, therefore, provide a mechanism for skills, knowledge and technology transfer among member states with a view to enhancing sustainability, human capital and regional competitiveness.

In view of these principles, the process employed three approaches to tourism planning namely: *Destination Competitiveness* approach; *Sustainable Tourism Development* approaches, specifically, strategic planning and stakeholder participation; and thirdly, *Project Management* approach that was used in designing the STMP implementation framework.

To achieve the goal of stakeholder participation in the STMP development process, a broad base of tourism stakeholders were consulted through key informant interviews and three consultative workshops bringing together all the regions of the country. These were held in Addis Ababa, Mekele and Dire Dawa. The stakeholders were drawn from the public sector organisations and institutions, the private sector, academia, tourism industry associations, community-based tourism organisations, and relevant civil society organisations (see Appendix). In addition, reconnaissance field missions were undertaken to selected destinations within the country including: Addis Ababa city and its environs, Western regions, Southern regions, Northern regions, and the South-Eastern regions (see Appendix 1.5). Appendix 1.1 below summarises the STMP development process.

Further, during the STMP Development process, a number of isolated initiatives that have been or are being undertaken in the development of the country's tourism industry were considered. These are listed in Appendix 1.2.

1.1 STMP Formulation Activity Plan

	ACTIVITY MONTH	4/ 13	11/ 13	12/ 13	1/ 14	2/ 14	3/ 14	4/ 14	5/ 14	6/ 14	7/ 14	8/ 14	9/ 14	10/ 14	11/ 14	12/ 14
1	Initial familiarisation tours: Arba Minch, Aksum, Lalibela															
2	Project inception															
3	Collating and review of literature on the importance of tourism development in Ethiopia															
4	Design and pretesting of data collection tools															
5	**Field Mission 1:** **Eastern region-** Dire Dawa City, Harar City, Jaguor World Heritage Site, Awash N.P, selected hotel facility tours, interviews with selected key informant **Addis Ababa-** selected attractions, selected hotel facility tours, interviews with selected key informants															
6	**Field Mission 2:** **Southern regions-** Adama Town, Lake Lagano, Hawassa City, selected hotel facility tours, interviews with selected key informants **Addis Ababa -**University of Addis Ababa, UNISA-Addis Ababa campus, Catering and Tourism Training Institute (CTTI)-Addis Ababa, interviews with selected key informants															
7	**Field Mission 3:** **Northern regions-** Gondar City, Fasil Ghebi castles, University of Gondar, Bah Dir City, Monasteries in Lake Tana, selected hotel facility tours, interviews with selected key informants **Western region-** Gambella, Jimma, Jimma Museum, Chebera-Churchura National Park, Gibe Valley National Park, selected hotel facility tours, interviews with selected key informants **Addis Ababa-** selected attractions, selected hotel facility tours, interviews with selected key informants															
8	**Regional stakeholders' consultative forum 1:** Dire Dawa **Regions represented:** Harari Regional State; Dire Dawa City Administration; Ethiopian Somali Region															
9	**Regional stakeholders' consultative forum 2:** Mekele **Regions represented:** Amhara, Tigray Regional states															
10	**Regional stakeholders' consultative forum 3:** Addis Ababa **Regions represented:** Afar Region, SNNPR, Benishangul, Addis Ababa City Administration, Gambela, Oromiya															
11	Preparation of 1st Draft STMP															
12	Draft STMP Validation Workshop															
13	Preparation of 2nd STMP Draft															
14	**2nd STMP Draft presentation**															
15	**Final Draft STMP**															
16	**STMP Launch and Project Closure**															

1.2 List of Tourism Development Initiatives Considered in the STMP Formulation

	Title	Project Sponsor	Status
1	Enhancement of the Ethiopian Tourism Statistics Management	ESTP/World Bank	Ongoing
2	Production of tourism promotion materials (printed, videos, photos, website)	ESTDP/World Bank	Ongoing
3	Development of a tourism marketing plan and branding strategy for Ethiopia	ESTDP/World Bank	Ongoing
4	Study trip for tourism officials	ESTDP/World Bank	Ongoing
5	Development of plan for Western Route	ESTDP/World Bank	Ongoing
6	Implementation of hotel grading	ESTDP/World Bank	Ongoing
7	Capacity building (training activities)	ESTDP/World Bank	Ongoing
8	Support to set up the ETO	European Union	Ongoing
9	Development of a marketing strategy for wildlife tourism in Ethiopia	UNDP/GEF	Finalised, Oct. 2013
10	Promoting heritage and culture for Ethiopia´s development	EU	Ongoing
11	Tourism map of Gondar	AECID	Finalised
12	Abuna Yoseph, Community Tourism, Lalibela	Frankfurt Zoological Society	Ongoing
13	Community based tourism in Simien Mountains National Park	JICA	Ongoing
14	Regional biodiversity project IGAD/ Gambella National Park	EU Regional Project (managed from delegation in Djibouti)	Ongoing
15	Training of trekking guides	Italian Cooperation	Ongoing

Other completed projects considered:

Ethiopia's Tourism Sector: Strategic Paths to Competitiveness and Job Creation by the World Bank and MoCT, October,2013

Tourism Marketing Strategy of Amhara National Regional State (2011-2015) by the Amhra NRS Bureau of Culture Tourism & Parks Development (n.d)

Sustainable Development of the Protected Area System of Ethiopia (SDPASE), by MoCT and UNDP , June, 2012

Draft Lake Tana Tourist Destinations Networking Development Plan, *Amhra NRS Bureau of Culture Tourism & Parks Development, 2011*

Urban Tourism And Heritage Planning Manual, by the Ministry Of Urban Development And Construction, September, 2011

Enhancing private sector and community engagement in tourism services in Ethiopia, by the World Bank/ODI, 2009

Toward the Competitive Frontier – Strategies for Improving Ethiopia's Investment Climate, by World Bank, June 2009

Sustainable Tourism Networking Development Plan for North Gondar Administration Zone by the Amhra NRS Bureau of Culture Tourism & Parks Development (2009)

Strategy for Tourism Development in Gondar conducted as part of the *Ethiopian Cultural Heritage Project: Site Planning and Conservation Activities in Gondar & Aksum,* World Bank and FDRE, May, 2007

Aksum: Tourism Development Strategy & Proposed Implementation Actions conducted as part of the *Ethiopian Cultural Heritage Project: Site Planning and Conservation Activities in Gondar & Aksum*, World Bank and FDRE, May, 2007

Development of Alternative Livelihoods for the Population of the Simen Mountains National Park, Ethiopia, by *the Amhra NRS Bureau of Culture Tourism & Parks Development, 2006*

Ethiopia, In Makeda's Footsteps: Towards a Strategy for Pro-Poor Tourism Development.Prepared for the Government of Ethiopia by the World Bank, June,2006

1.3 List of Organisations Consulted

	ORGANISATION	NATURE OF ORGANISATION
	A. Federal Offices	
1	Ministry of Culture and Tourism o Office of the State Minister for Tourism o Head of Tourism Marketing o Directorate of Quality and Capacity Development	Government (Policy and Planning)
2	Ethiopian Tourism Organisation	Government (Policy and Planning)
3	Ethiopian Airlines	Public (National Carrier)
4	Council of Peoples Representatives	Government (Policy and Planning)
5	Ministry of Health	Government (Policy and Planning)
6	Government Communication Office	Government (Policy and Planning)
7	Ethiopian Chamber of Commerce	Government (Policy and Planning)
8	Member of Coalition for Tourism	Government (Policy and Planning)
9	Ethiopian Cultural Heritage Conservation and Research Authority	Government (Policy and Planning)
10	National Museum	Government (Policy and Planning)
11	Ethnographic Museum	Government (Policy and Planning)
12	Ethiopian Archive Agency	Government (Policy and Planning)
13	Ethiopian Road Authority	Government (Policy and Planning)
14	Ethiopian Sustainable Tourism Development Project	Government (Policy and Planning)
15	Ethiopia Wildlife and Conservation Authority	Government (Policy and Planning)
	B. Regional Organisations	
1	Local Government – Lalibela	Government (Policy and Planning)
2	Local Government – Aksum	Government (Policy and Planning)
3	Tourism Bureau – Arba Minch	Government (Policy and Planning)
4	Bah Dir Culture and Tourism Bureau	Government (Policy and Planning)
5	Culture and Tourism Bureau, Gambella	Government (Policy and Planning)
6	Afar Region Culture & Tourism Bureau	Government (Policy and Planning)
7	Semera Culture & Tourism Bureau	Government (Policy and Planning)
8	Asayita Culture & Tourism Bureau	Government (Policy and Planning)
9	S/N/N/R/S Regional Administration	Government (Policy and Planning)
10	S/N/N/R/S Culture & Tourism Bureau	Government (Policy and Planning)
11	Hawasa City Administration	Government (Policy and Planning)
12	Gamogofa Zone Culture, Tourism & Government Communication Department	Government (Policy and Planning)
13	Gurage Zone Culture, Tourism & Government Communication Department	Government (Policy and Planning)
14	Kefa Zone Culture, Tourism & Government Communication Department	Government (Policy and Planning)
15	South Omo Zone Culture, Tourism & Government Communication Department	Government (Policy and Planning)
16	Hamer Woreda Administration	Government (Policy and Planning)
17	Culture & Tourism of N. Shewa	Government (Policy and Planning)
18	Benishangul Culture & Tourism Bureau	Government (Policy and Planning)
19	Benishangul Regional Administration	Government (Policy and Planning)

20	Gambela Culture & Tourism Bureau	Government (Policy and Planning)
21	Gambela Regional Administration	Government (Policy and Planning)
22	Oromiya Culture & Tourism Bureau	Government (Policy and Planning)
23	Bale Zone	Government (Policy and Planning)
24	North Shoa Zone	Government (Policy and Planning)
26	West Arsi	Government (Policy and Planning)
27	East Wollegga	Government (Policy and Planning)
28	Kelam Wollegga	Government (Policy and Planning)
29	Batu Community Tourism	Government (Policy and Planning)
30	Adama Town Culture and Tourism	Government (Policy and Planning)
31	Addis Ababa Culture & Tourism Bureau	Government (Policy and Planning)
32	Addis Ababa City Administration	Government (Policy and Planning)
33	Dalol Culture & Tourism (Afar)	Government (Policy and Planning)
34	Amhara National Regional State	Government (Policy and Planning)
35	Amhara Region Culture and Tourism Bureau	Government (Policy and Planning)
36	Amhara National Regional State Health Bureau	Government (Policy and Planning)
37	Office of the Mayor, Gondar City Administration	Government (Policy and Planning)
38	Gondar City Administration, Department Town Development	Government (Policy and Planning)
39	Gondar City Administration, Department of Culture Tourism	Government (Policy and Planning)
40	Office of the Mayor, Bahir Dar City Administration	Government (Policy and Planning)
41	Bahir Dar City Administration, Culture and Tourism Department	Government (Policy and Planning)
42	Lasta Werda Administration	Government (Policy and Planning)
43	Office of the Mayor, Lalibela	Government (Policy and Planning)
44	Local Administration of Lalibela	Government (Policy and Planning)
45	Lalibela Culture Tourism Bureau	Government (Policy and Planning)
46	Rock hewn churches of Lalibela Administration	Government (Policy and Planning)
47	Culture & Tourism of S. Wollo	Government (Policy and Planning)
48	Tigri Regional State Administration	Government (Policy and Planning)
49	Mekele City Administration	Government (Policy and Planning)
50	Tigri Culture & Tourism Agency	Government (Policy and Planning)
51	Harari Regional Administration and Bureau Head	Government (Policy and Planning)
52	Harari Regional Bureau of Culture and Tourism	Government (Policy and Planning)
53	Harari Regional Health Bureau	Government (Policy and Planning)
54	Ethiopian Somali Region	Government (Policy and Planning)
55	West Harerge Culture and Tourism	Government (Policy and Planning)
56	East Harerge Culture & Tourism	Government (Policy and Planning)
57	Awash 7 Local Administration	Government (Policy and Planning)
58	Awash 7 Kilo Culture & Tourism Bureau	Government (Policy and Planning)
59	Dire Dawa Culture & Tourism Bureau	Government (Policy and Planning)

60	Dire Dawa City Administration, Office of the Mayor	Government (Policy and Planning)
61	Dire Dawa Health Bureau	Government (Policy and Planning)
62	Dire Dawa City Administration, Planning Office	Government (Policy and Planning)
	A. Public Conservation Agencies	
1	Ethiopia Wildlife and Conservation Authority – Nechisar, Arba Minch	Government (Conservation)
2	Ethiopia Wildlife and Conservation Authority - Sinkele	Government (Conservation)
3	Senior Warden, Awash National Park	Government (Conservation)
4	Senior Warden, Gambella National Park	Government (Conservation)
5	Senior Warden, Gibe Valley National Park	Government (Conservation)
6	Park Warden, Maze National Park	Government (Conservation)
7	Park Warden, Mago National Park	Government (Conservation)
8	Abijata-Shala National Park Management	Government (Conservation)
9	Management, Bale Mountain National Park	Government (Conservation)
10	Chief warden, Simien Mountain National Park	Government (Conservation)
11	Jimma Abajifar Museum	Government (Conservation)
12	Jimma National Coffee Museum	Government (Conservation)
	B. Tourism Training Institutions	
1	Gondar University	Tourism Training Institutions (Public)
2	Bahirdar University	Tourism Training Institutions (Public)
3	Mekelle University	Tourism Training Institutions (Public)
4	Department of Tourism Management, University of Gondar	Tourism Training Institutions (Public)
5	University of South Africa (UNISA)- Addis Ababa Campus	Tourism Training Institutions (Private)
6	College of Development Studies, Addis Ababa University	Tourism Training Institutions (Public)
7	Centre for Environmental and Development Studies, Addis Ababa University	Tourism Training Institutions (Public)
8	Catering and Tourism Training Institute (CTTI), Addis Ababa	Tourism Training Institutions (Public)
9	Haromaya University (HU)	Tourism Training Institutions (Public)
10	Hawasa University	Tourism Training Institutions (Public)
11	Mizan Aman University	Tourism Training Institutions (Public)
12	Dila University	Tourism Training Institutions (Public)
13	Wolita Sodo University	Tourism Training Institutions (Public)
14	Wendo Genet Forestry College	Tourism Training Institutions (Public)
15	Jimma University (JU)	Tourism Training Institutions (Public)
16	Madda Walabu University (MWU)	Tourism Training Institutions (Public)
17	Civil Service University	Tourism Training Institutions (Public)
18	Addis Ababa University	Tourism Training Institutions (Public)
19	Dire Dawa University	Tourism Training Institutions (Public)
20	National Aviation College	Tourism Training Institutions (Private)

	A. Religious And Community Organisations	
1	Orthodox Church – Lalibela	Religious and Community Organisation
2	The Council of Ethiopian Islamic Affairs	Religious and Community Organisation
3	Office of His Holiness, Ethiopian Orthodox Church	Religious and Community Organisation
4	Ethiopian Orthodox Church Bahirdar Heritage Conservation	Religious and Community Organisation
5	Amhara Regional State Islamic Affairs High Counsel	Religious and Community Organisation
6	Tigri Regional Islamic Affair	Religious and Community Organisation
	B. Professional/Civil Society	
1	Arba Minch Hotel Owners Association	Professional/Civil Society
2	Aksum Hotel Owners Association	Professional/Civil Society
3	Ethiopia Tour Operators Association	Professional/Civil Society
4	Afar Tour Guides Association	Professional/Civil Society
5	Mossaic-Land Local Guides Association (Hawassa)	Professional/Civil Society
6	Hotel Owners' Association	Professional/Civil Society
7	Hotel Professionals Association	Professional/Civil Society
8	Ethiopia Hotels Professional Association	Professional/Civil Society
9	Tour Guide Association - Lalibela	Professional/Civil Society
10	Ethiopia Tourism Professionals Association	Professional/Civil Society
11	Hawasa Hotel Owners Association	Professional/Civil Society
12	Hawasa Tourist Guides Association	Professional/Civil Society
14	Adama Hotel Association	Professional/Civil Society
15	Bishoftu Hotel Association	Professional/Civil Society
16	Addis Ababa Hotel & Restaurant Owners Association	Professional/Civil Society
17	Ethiopian Tour Operators Association	Professional/Civil Society
18	Ethiopian Hotel Professionals Association	Professional/Civil Society
19	Ethiopian Eco Tourism Association	Professional/Civil Society
20	Traditional Souvenir and Clothes Producers Association	Professional/Civil Society
21	Airport Taxi Association	Professional/Civil Society
22	Berkish Tefases Natural Resource & Tourism Development Association	Professional/Civil Society
23	Tigri Registered Tour Operators Association	Professional/Civil Society
24	Mekelle Hotels & Restaurant Owner Association	Professional/Civil Society
25	Aksum Guide Association	Professional/Civil Society
26	Aksum Hotel & Restaurant Association	Professional/Civil Society
27	Aksum Traditional Cloth Producers Association	Professional/Civil Society
28	Wukro Hazien Hotel & Restaurant Owner Association	Professional/Civil Society
29	Gheralta Tour Guide Association	Professional/Civil Society
30	Yeha Guides Association	Professional/Civil Society

31	Lalibela Local Guides Association	Professional/Civil Society
32	Lalibela Hotel Owners Association	Professional/Civil Society
33	Local Guide Association Zege	Professional/Civil Society
34	Representative of Aweramba Community	Professional/Civil Society
35	Local Guides Association TisAbay	Professional/Civil Society
36	Bahirdar Hotel Owners Association	Professional/Civil Society
37	Bahirdar Local Guides Association	Professional/Civil Society
36	Aksum Souvenir Shop	Professional/Civil Society
39	Gondar Souvenir Shop Owners	Professional/Civil Society
40	Gondar Representatives of Hotel Owners	Professional/Civil Society
41	Plusher Women Hand Craft Centre	Professional/Civil Society
42	Gondar Local Guides Association	Professional/Civil Society
43	Tourist Guides Association (Harar)	Professional/Civil Society
44	Tourist Guides Association (Dire Dawa)	Professional/Civil Society
45	West Harerge Handicraft Producers Association	Professional/Civil Society
46	Harar City Hotel Owners Association	Professional/Civil Society
47	Representatives, Private airlines (National Airways)	Private

1.4 Stakeholders Consultation Data Collection Tool

FEDERAL DEMOCRATIC REPUBLIC OF ETHIOPIA
MINISTRY OF CULTURE AND TOURISM
SUSTAINABLE TOURISM MASTERPLAN DEVELOPMENT
STAKEHOLDERS' CONSULTATIVE FORUM

A. DATE: _____

B. NAME OF YOUR REGION: _____

C. THE VISION FOR ETHIOPIAN TOURISM INDUSTRY (Where do you see Ethiopia as a tourism destination in the next 10 years?)

D. KEY TOURISM DEVELOPMENT THEMATIC AREAS FOR YOUR REGION
In each of the following thematic areas, highlight the issues/challenges being faced in the development of tourism within your region and provide the recommendations on what you consider should be done to address the identified issue(s).

THEMATIC AREA (9)	ISSUES/ CHALLENGES	RECOMMENDATIONS (Your aspirations)
Tourism Policy, Regulation and Institutional Framework • What policy and regulation issues are addressed? • Who is responsible for policy and regulation of tourism issues highlighted? • How is the link between regional and national institutions?		
Tourism Product Development • What is the product? • How well is the product developed? • Who is in charge?		
Tourism Marketing and Promotion • Who is doing it? • How well is it being done? • Who are you major markets? o domestic? o regional? o international? • Do we have the right product for these markets?		
Human Resource Development • How is human resource developed-any institutions? • Who funds training for tourism training? • Any specific strategies to develop HR capacity for tourism? • Are staff competent enough to offer quality service?		
Tourism Safety and Security • Is security for tourists an issue? • How do you ensure that tourists are safe in your region? • Are there any health concerns among tourists?		
Tourism Infrastructure • Availability of quality hotels and other facilities • Hotel classification o Any effect on tourism development? o Who does it? • Quality of tour operations in the region? • Availability of relevant ICT infrastructure?		

Support Infrastructure • Destination accessibility o Any restrictions? o Air transport network and connectivity? o How competitive are air fares? o Ground transportation- network, quality of roads, road safety?		
Tourism Research and Development • What role is research playing in tourism policy and development? • Do institutions of higher learning have relevant capacity to conduct research in tourism?		
Natural and Cultural Resource Conservation • How well are natural and cultural resources conserved? • The exploitation of the resources as tourist attraction? • Contribution of tourism to social-economic development of the local communities? • Contribution of tourism to environmental conservation?		

1.5 Summary of Field Missions Undertaken

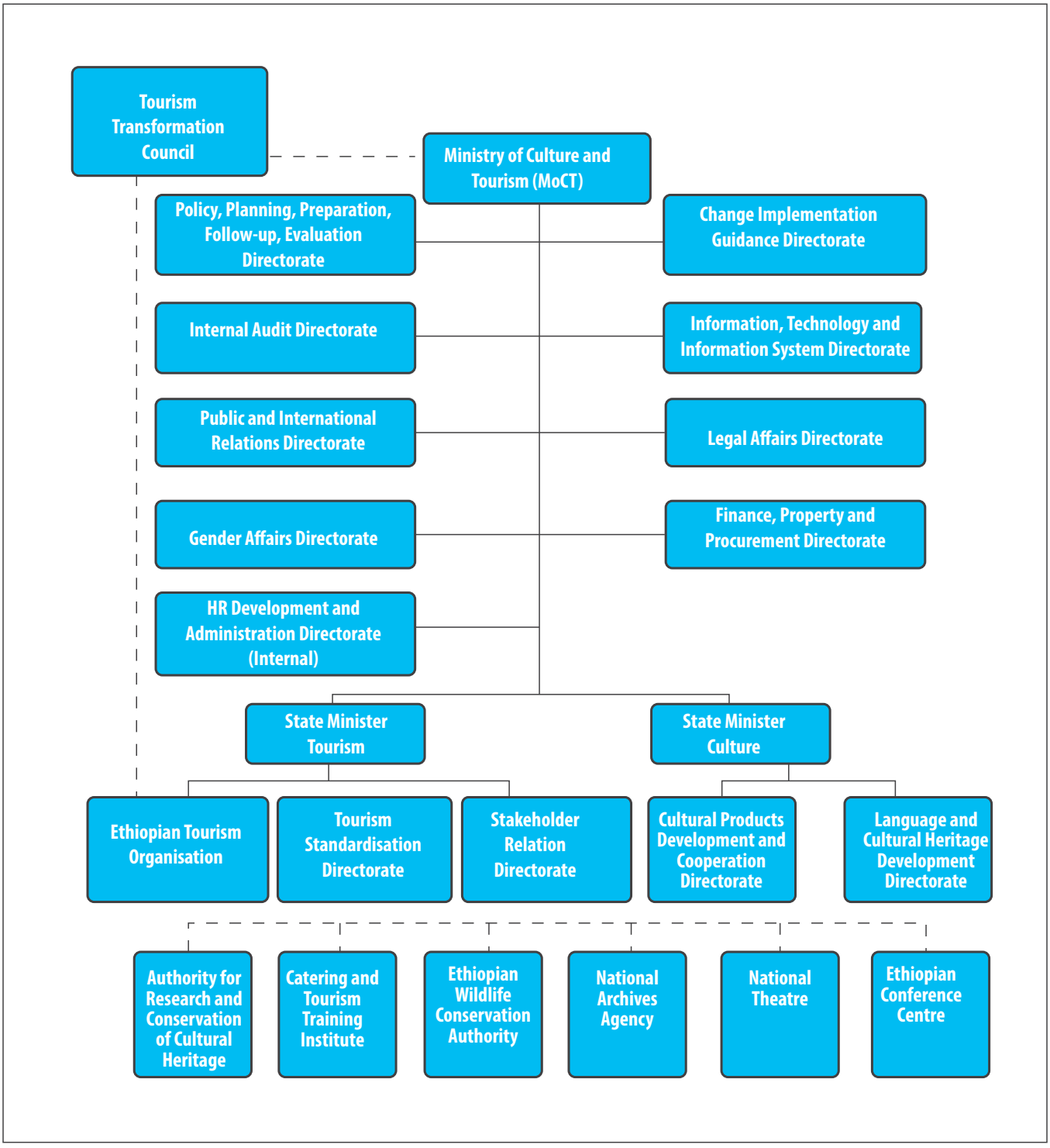
A.	**Addis Ababa**
-	City Tours
-	Catering and Tourism Training Centre (CTTC)-Addis Ababa
-	UNISA-Addis Ababa Campus
-	University of Addis Ababa
-	Selected hotel facility tours/observations
B.	**Eastern region**
-	Dire Dawa City
-	Awash N.P
-	Harar City and Jaguor World Heritage Site
-	Selected hotel facility tours/observations
C.	**Northern region**
-	Weldiya
-	Gondar City
-	Fasil Ghebi castles
-	University of Gondar
-	Bah Dir City
-	Monasteries in Lake Tana
-	Mekele
-	Aksum
-	Lalibela
-	Selected hotel facility tours/observations
D.	**Southern region**
-	Arba Minch
-	Hawassa City
-	Lake Hawassa
-	Lake Lagano
-	Adama Town
-	Sodere hot springs
-	Selected hotel facility tours (Lewi Resort, Hawassa, Kivu Resort and Lake Lagano Resort)
E.	**Western region**
-	Gambella
-	Jimma
-	Gibe Valley *National Park*
-	Chebera-Churchura *National Park*
-	Jimma Museum
-	Selected hotel facility tours/observations

1.6 List of Benchmark Cases Considered

Strategic Programme	Benchmarks Referred
1.0 Tourism Product Development	• USA • Kenya • South Africa
2.0 Tourism Marketing and Promotion	Destination Management System (DMS) • UK: www.visitbritain.com • Australia: www.visitaustralia.com • Kenya: www.magicalkenya.com Japan: Use of ICT to create image: Malta tourism Authority: http://www.webatelier.net/reports Creating a framework for realising a sustainable destination marketing and promotion • Australian Trade Commission • Ministry of Tourism, India National and regional branding • South Africa • Australia • USA • Switzerland
3.0 Investment in Tourism Infrastructure	• Nigeria • Kenya • Afghanistan **Tourism Investment Fund** • Egypt's Tourism Assistance Fund • Caribbean Tourism Investment Fund • Kenya Tourism Development Corporate • The Nova Scotia Tourism Agency Tourism Development Investment Fund (https://novascotiatourismagency.ca/tourism-development-investment-fund) • Tourism Trust Fund
4.0 Human Resource Development	• Switzerland • Rwanda • Kenya • South Africa
5.0 Tourism Research and Development	Tourism Research • Australia • Kenya
6.0 Tourist Safety and Security	Asia-Pacific Economic Cooperation
7.0 Tourism Support Infrastructure and Services	• Millau Viaduct in France, the world's longest bridge • The Jiaozhou Bay Bridge in China • The London Tower Bridge in the United Kingdom • The Hoover Dam in USA
8.0 Sustainable Tourism Development	• Global code of ethics on tourism developed by UNWTO • UNESCO framework for cultural heritage sites conservation • Eco-certification programmes developed for the tourism industry by different national chapters of the *International Eco-tourism Society* • Kenya's *Eco-tourism Society* has developed the *Eco-Warrior Awards* and the *Eco-Labels* to foster ecotourism ideals in the country

9.0 Policy, Regulatory and Institutional Framework	• Mauritius Export Processing Zone (MEPZ) • China's Shenzhen SEZ • China-Singapore Suzhou Industrial Park (SIP) • Kenya • South Africa
10.0 Tourism Development Financing	Tourism Development Levy (TDL) • Kenya (www.tourismfund.co.ke) and • Ghana (www.ghana.travel/services/tourism_levy/) • South Africa (http://tomsa.co.za/)

2.0 Ethiopia's ministry of culture and tourism organisational chart



3.0 Protected Wildlife Areas of Ethiopia, with their sizes

1. National Parks

	Name of the national park	Location	Year established	Area in km²
1	Awash	Oromiya & Afar (F)	1958	756
2	Simien Mountains	Amhara R.S (F)	1959	412
3	Alatish	Amhara R.S (F)	1997	2,666
4	Bahir Dar Blue Nile River Millennium	Amhara R.S	2008	4,729
5	Borena Saynt	Amhara R.S	2001	4,325
6	Bale Mountains	Oromiya R.S (F)	1962	2,200
7	Abijata lakes	Oromiya R.S (F)	1963	887
8	Omo	S.N.N.P R.S (F)	1959	3,566
9	Nechisar	S.N.N.P R.S (F)	1966	514
10	Mago	S.N.N.P R.S	1974	1,942
11	Chebera Churchura	S.N.N.P R.S	1997	1,190
12	Maze	S.N.N.P R.S	1997	202
13	Yangudi-Rassa	Afar R.S (F)	1969	4,731
14	Gambela	Gambela R.S (F)	1966	5,061
15	Geraile	Somali R.S	1998	3,558
16	Dati Wolel	Oromia R.S	1998	431
17	Yabello	Oromia R.S	1978	2,500
18	Gibe Sheleko	S.N.N.P R.S	2001	248
19	Loka Abaya	S.N.N.P R.S	2001	500
20	Kafeta Shiraro	Tigray R.S (F)	1999	5,000

Key: 'R.S' stands for Regional State.
'(F)' stands for Administering by Federal government.

2. Wildlife Sanctuaries

	Name of the sanctuary	Location	Year established	Area in km²
21	Babile Elephant	Oromiya & Somali R. (F)	1962	6,987
22	Senkele	Oromiya & S.N.N.P R.S (F)	1964	54
23	Deara	Oromiya R.S	1986	19.4

3. Wildlife Reserves

	Name of the wildlife reserve	Location	Year established	Area in km2
24	Tama	S.N.N.P R.S	-	1,665
25	Chelbi	S.N.N.P R.S	-	4,212

4. Controlled Hunting Areas

	Name of the controlled hunting area	Location	Year of establishment	Area in km²
26	Abasheba Demero	Oromiya R.S	1994	210
27	Areba-Gugu	Oromiya R.S	1995	341
28	Dindin	Oromiya R.S	-	280
29	Besemena-Odobulu	Oromiya R.S	1993	350
30	Munessa-Kukie	Oromiya R.S	1993	111
31	Shedem Berbere	Oromiya R.S	1988	170
32	Hanto	Oromiya R.S	1991	190
33	Bilen Hertalie	Afar R.S	-	1,090
34	Chifera	Afar R.S	1998	510
35	Telalak-Dewe	Afar R.S	-	457
36	Murullie	S.N.N.P R.S	-	690
37	Wilshet-Sala	S.N.N.P R.S	2000	350
38	Sororo-Torgam	Oromiya R.S	2000	78
39	Haro Abadiko	Oromiya R.S	2000	200
40	Urgan Bula	Oromiya R.S	2000	78
41	Hurfa Soma	Oromiya R.S	2000	215
42	Adaba-Dodola	Oromiya R.S	2000	736

5. Open Hunting Areas

	Name of the open hunting area	Location	Year of establishment	Area in km²
43	Gara Gumbi	Oromiya R.S	-	140
44	Gara Miti	Oromiya R.S	-	240
45	Alluto	Oromiya R.S	-	280
46	Sinana	Oromiya R.S	-	15
47	Jibat	Oromiya R.S	-	100
48	Debre Libanos	Oromiya R.S	-	31
49	Gelila Dura	Afar R.S	-	140

6. Community Conservation Areas

	Community conservation area	Location	Year of establishment	Area in km²
50	Simien Gibe	S.N.N.P R.S	2001	49
51	Garameba	S.N.N.P R.S	2001	25
52	Guassa	Amhara R.S		

PHOTO CREDITS

1. Cover photo *Haile Gebreselassie at the Great Ethiopian Run 2013*, Belachew Dereje
2. Cover photo *Mosque in Harar,* www.depositphotos.com
3. Page 5 *Map of Ethiopia,* Serban Bogdan
4. Page 16 *Muktar Edris of Ethiopia celebrates his 5000 metres victory of the 20th World Junior Athletics Championships at the Olympic Stadium on July 14, 2012 in Barcelona Spain,* Maxisports
5. Page 19 *Priest holding a crucifix*, www.depositphotos.com
6. Page 24 *Night view of Addis Ababa*, Belachew Dereje
7. Page 28 *Boy of the Arbore tribe with traditional body painting in Lower Omo Valley*, www.depositphotos.com
8. Page 30 *Addis Ababa light rail system*, Belachew Dereje
9. Page 46 *Rock hewn church in Lalibela*, Jack Malipan
10. Page 50 *Traditional cup of Ethiopian coffee served with rue leaf,* Belachew Dereje
11. Page 54 *The Simien wolf,* Naticastillog
12. Page 60 *IAAF world athletics 2009 in Kaftazoglio Stadium Greece*, Eleftherios Damianidis
13. Page 64 *Poolside at at hotel in Addis Ababa,* Viviolsen
14. Page 72 *Horse and carts in Ethiopia*, Alan Gignoux
15. Page 76 *Ethiopian Airlines Boeing 787 Dreamliner*, Mark Carlisle
16. Page 80 *International Conference on ICT for development, education and training, Addis Ababa 20th-22nd May 2015*, Belachew Dereje
17. Page 86 *Arthur Rimbaud Cultural Centre, Harar,* www.depositphotos.com
18. Page 94 *Brewing coffee with a jebena over coal,* Belachew Dereje
19. Page 98 *African Union Commission headquarters in Addis Ababa,* Belachew Dereje
20. Page 101 *Obelisk in Aksum,* Jorg Hackemann
21. Page 102 *Timket Celebrations in Ethiopia (2014),* Belachew Dereje
22. Page 106 *Nightfall over Lake Kuriftu, Ethiopia*, Belachew Dereje
23. Page 118 *Derg Monument Addis Ababa*, Belachew Dereje
24. Page 131 *Etra Ale volcano, Ethiopia*, Karel Tupy
25. Page 133 *13th edition of the great Ethiopian run*, Belachew Dereje
26. Page 138 *Priest in Lalibela,* Alan Gignoux
27. Page 142 *African Union rooftop*, Belachew Dereje
28. Page 144 *Boy at a local market near Addis Ababa,* Miroslav Liska
29. Page 152 *A man at a tea plantation near Jimma, Ethiopia*, Miroslav Liska
30. Page 160 *Evening view of St. George Church*, Miroslav Liska
31. Page 166 *UNESCO World Heritage Site. Fasilides Castle in Gondar, Ethiopia* Siempreverde
32. Back cover *Natural bridge between Lakes Chamo and Abaya*, www.depositphotos.com







Due to sweeping economic reforms, the Federal Democratic Republic of Ethiopia has been enjoying unprecedented tourism growth in recent years. This sustainable tourism master plan provides a ten year road map through which this nascent industry, that is becoming increasingly important, can achieve sustainable growth. The Ministry of Culture and Tourism, the agency mandated by the Federal Democratic Republic of Ethiopia to oversee the systematic development of tourism, prepared the Sustainable Tourism Master Plan (STMP) with financial and technical support from the UN Economic Commission for Africa (UNECA) Sub-Regional Office for Eastern Africa.







United Nations
Economic Commission for Africa

Ethiopia
LAND OF ORIGINS

Ethiopia Ministry of Culture and Tourism

Ethiopia Sustainable Tourism Development Project

Tourism Marketing Strategy for Ethiopia (2016-2020)



Final Draft, August 2015

Table of Contents

Foreword **3**
Executive Summary **4**
1 Introduction **8**
2 International Tourism Trends **9**
2.1 Global tourism performance *9*
2.2 Global tourism trends of relevance to Ethiopia *10*
3 Current Situation **13**
3.1 Market performance *13*
3.2 Tourism competitiveness *15*
3.3 Marketing strengths, weaknesses, opportunities and threats (SWOT) *19*
4 Future Vision **21**
4.1 Vision 2025 *21*
4.2 Objectives *21*
4.3 Principles *21*
4.4 Marketing success factors *22*
5 Growth Foundations **24**
5.1 A differentiated positioning *24*
5.2 A brand of distinction *26*
5.3 High-yielding target source markets and segments *27*
5.4 Products and experiences that match market needs *34*
6 Execution Programs **38**
6.1 Encounter the Origin destination marketing campaign *40*
6.2 Great Origin Routes *46*
6.3 Tena Yistilign Ethiopia service quality drive *50*
6.4 Ethiopia Tourism Information Network *51*
6.5 Meet Ethiopia *54*
7 Implementation **56**
7.1 A staged approach to implementation *56*
7.2 Institutional strengthening *57*
7.3 Strong and functional partnerships *61*
7.4 Adequate funding *64*
7.5 Monitoring and evaluation *64*
7.6 Tracking progress *65*
8 Action plan **67**
Addendum A: Detailed Marketing SWOT Analysis **76**
Addendum B: Market Analysis **82**
Addendum C: Online Marketing Strategy **104**
Addendum D: MICE Strategy **122**
Addendum E: Birding and Trekking Special Interest Segment Profiles **128**
Addendum F: Ethiopian Airlines Destinations and Flight Times **136**
Addendum G: Broad Categorisation of VICs **137**
References **140**
Acronyms and abbreviations **141**

Foreword

Tourism has been designated a priority growth sector by the Government of Ethiopia and the establishment of a National Tourism Council under chairmanship of the Honourable Prime Minister is proof of the significance attached to the sector and the Government's high expectations for future tourism growth.

Since establishing the Ethiopian Tourism Organisation (ETO) in 2013 we have made good strides in developing an efficient and effective national tourism marketing organisation. ETO's management Board consists of independent professionals of the highest calibre and the organisation has progressed well in establishing a professional and skilled staff component.

This national marketing strategy is a very important and positive step forward in directing ETO's destination marketing approach and activities and supporting our vision of ranking among the top five destinations in Africa in tourism revenues by 2025.

The marketing strategy should be read in conjunction with the Ethiopia Tourism Brand Strategy, which was formulated simultaneously with the marketing strategy. The Brand Strategy sets out the brand personality, brand promise and brand essence of Destination Ethiopia and presents a visual trademark for promoting the destination. In addition, complementary regional marketing strategies have been formulated for Ethiopia's most prominent tourism regions namely Addis Ababa City, Amhara, Oromia, Tigrai and the Southern Nations, Nationalities and Peoples' Region.

Both the Marketing and Brand Strategies are the result of extensive consultations with public and private stakeholders in Ethiopia over an eight-month period and provide solid foundations for a collaborative approach in promoting 'Ethiopia, Land of Origins' to our various target markets. The strategy document includes a range of innovative marketing concepts that address our most important promotional opportunities and challenges, as well as a practical implementation plan that will serve as a barometer of progress over the next five years.

I wish to thank the Ministry of Culture and Tourism, through their Ethiopia Sustainable Tourism Development Programme (ESTDP) for commissioning and funding both the Marketing and Brand Strategies.

We look forward to working with our public and private sector partners in implementing this strategy and growing tourism as a powerful vehicle for economic growth and job creation over the next five years.

Solomon Tadesse

Chief Executive Officer
Ethiopian Tourism Organisation

Executive Summary

The overall goal of this Marketing Strategy is to provide the Ethiopian Tourism Organisation (ETO) with a well-conceptualised and brand-focused marketing plan, which addresses tourism promotion at the national and regional levels and enables the ETO to achieve the best possible market positioning and demand growth over the next five years, 2016-2020.

The strategy capitalises on international travel trends such as the quest for authentic experiences, increasing demand for flexible travel itineraries, growth in youth travel as well as the more mature age segments, the potential offered by emerging and new growth markets, the growing importance of online marketing technologies and the resultant changing role of tour operators.

Tourism arrivals to Ethiopia have grown very well in recent years and Ethiopia has the advantage of being an all-year destination. Despite such good growth Ethiopia's tourism market share in Africa remains limited with the country occupying 12th place in tourist arrivals and 10th place in tourist revenues. Average expenditure per visitor is moderate and the share of leisure tourist arrivals is low, with most visitors being non-discretionary business travellers. Tourism is also unequally spread through the country with Addis Ababa and three other regions receiving the bulk of tourists.

An analysis of destination strengths, weaknesses, opportunities and threats reveals a spectrum of opportunities and challenges related to the seven marketing 'Ps' (positioning, products, promotion, price, place/distribution, people and processes). The following key competitive advantages and disadvantages are highlighted when comparing Ethiopia to regional competitors:

- *Competitive advantages:* a large number of unique, iconic tourist sites; Ethiopia's rich cultural diversity, ancient cultural practices and unique cultural traditions; the outstanding hospitality, friendliness and peacefulness of the people; ancient historical sites and relics; breath-taking scenic beauty and natural features; excellent air links; and good value-for-money offered to visitors
- *Competitive disadvantages:* limited wildlife and safari experiences (compared to the rest of East Africa); limited city life and conferencing; few contemporary man-made attractions; limited hospitality facilities; land transport limitations; difficulty of planning and booking travel; limited skills and institutional capacity to operate, develop and promote tourism; and image barriers related to personal health and safety

The following aspects underpin a 2025 tourism vision for Ethiopian tourism:

- *The vision* is for Ethiopia to rank among the top five destinations in Africa in tourism revenues, with tourism having a sustainable, highly positive impact on Ethiopia's economy and its socio-cultural and environmental landscape
- This will require achieving ambitious market *growth targets,* namely: increasing tourism arrivals at an average annual rate of 13% per annum to 3 million; increasing receipts per visitor at an average annual rate of 1,6% per annum to US$1,100 (at current prices) and increasing total tourism receipts at an average annual rate of 15% per annum to US$3,4 billion (at current prices)
- The destination marketing strategy will be underpinned by three *key principles* namely: retaining the authenticity of the experience, ensuring sustainability of environmental, historical and cultural resources and managing tourism with sensitivity towards local traditions and community structures

- Eight key *marketing success factors* are identified for achieving the vision and targets, namely: a) achieving higher levels of brand recognition; b) focusing on high-yield tourism markets and on 'value' rather than merely 'volume'; c) diversifying the range of tourism products and experiences and packaging these to suit the needs and tastes of target markets; d) stepping up destination promotion; e) striving for service excellence and value for money; f) building a vibrant marketing partnership; g) strengthening human, technological and financial marketing capacity and h) improving marketing measurement, monitoring and knowledge

The following marketing growth foundations are defined:

- *A differentiated market positioning* based on Ethiopia's 'Spirit of Originality', which is evident in the many 'origins' to be found all over the country. These include, among others, the origin of humanity (the 'Lucy' fossil remains); the origin of a global coffee culture; the origin of a unique language founded in Ge'ez and manifested in Amharic; the origin of the ancient Axumite empire and its architectural achievements, carried through to various future Ethiopian empires; the origin of cultural tolerance and of a new nation on the rise; the origin of the Blue Nile river and other spectacular topographies (e.g. Lake Tana, Simien Mountains, Bale Mountains, Rift Valley lakes, spectacular river gorges, etc.); as well as the origin of various unique and endemic fauna and flora species.

  This positioning implies that Ethiopia is primarily a destination for experiencing and learning (more so than a holiday destination for relaxation), that the target market is the experience seeker, that the experiences offered need creative development and packaging and that the tourism brand is layered and multi-facetted and needs to be communicated as such.

- *Ethiopia's brand of distinction* includes a unique brand promise and essence:
  - Brand Promise: 'Ethiopia invites you to discover why it is the origin of so much history and culture, vibrantly alive in a landscape of dramatic beauty'
  - Brand Essence: 'Ethiopia: Land of Origins'

- *High-yielding source markets and segments targeted* are:
  - *Source markets (countries)*
    - *Core markets (Capture and allocate 60% of marketing resources),* i.e. markets with high revenue potential, an affinity for leisure travel to Ethiopia and that are easier and less costly to penetrate. These are: UK, Germany France, Italy, USA (East and West Coast areas), Saudi Arabia (especially during Middle East summer) and the domestic market
    - *Potential growth market (Invest for Growth and allocate 20% of marketing resources),* i.e. markets with high revenue potential, low incidence of leisure travel to Ethiopia and that are more difficult and costly to penetrate. These are: China (focus on '2nd wave' experiential travellers), Japan, Australia and Canada
    - *Steady markets (Maintain and allocate 10% of marketing resources)*: i.e. markets with lower revenue potential but an affinity for leisure travel to Ethiopia and that are easier and less costly to penetrate. These are Benelux countries, Sweden/ Norway, Switzerland, Sudan, Kenya, Djibouti and Israel
    - *Opportunity markets (Watch and leverage with spare resources)*, i.e. markets with lower total revenue potential, lower incidence of leisure travel and that are more difficult to penetrate, but with pockets of value. These are India, South Africa, Russia, Nigeria, Brazil, Korea and UAE
  - *Target market segments (traveller types)*

- *Segments to Embrace*, which offer good value and which Ethiopia is ready to receive, focusing 60% of resources here. These include Packaged Explorers, Tailored Explorers, Trekkers and Domestic and Regional Breaks
- *Segments to Develop,* which offer good value but which Ethiopia is less ready to receive, focusing 30% of resources here. These include Intrepid Explorers, MICE visitors and Adventure Sport Enthusiasts
- *Segments to Leverage*, which Ethiopia is ready to receive but which do not offer such good growth value, focusing 10% of resources here. These include birders, business travel extensions and other niche segments such as visitors interested in antiquities, religion and pilgrimage, archaeology, palaeontology, geology, anthropology, art, etc.

- *Developing products and experiences that match market needs:* The strategy defines suitable product development approaches and identifies priority development sites and experiences for servicing and attracting the identified target market segments, i.e.
  - *Packaged Explorers:* Focus product development on visitor convenience, management and interpretation at key historical sites on the traditional tourism circuits
  - *Domestic Breaks:* Focus product development on entertainment, relaxation and socialisation
  - *Tailored Explorers:* Focus product development on diversifying the range, quality and depth of experiences on offer
  - *Intrepid Explorers:* Focus product development on packaging extraordinary, off-the-beaten-track experiences and circuits, especially environmental and cultural
  - *Special interest markets (Trekkers, Birders, Adventure Sport Enthusiasts)*: Focus product development on packaging special interest experiences and improving community hospitality
  - *MICE:* Focus product development on building capacity for hosting and expanding the Meetings, Incentives, Conventions and Exhibitions industry

The strategy will be executed through a portfolio of *five key programmes*, namely:

- *'Encounter The Origin'***:** A three-year, multi-channel international and domestic promotional campaign, serving as an umbrella call to action and communication theme.

  Key elements: Creative campaign imagery applied to all visuals; website design improvements; multi-faceted digital and social media development drive; travel trade education and joint marketing initiatives; media promotion; domestic promotion campaign; events support.

- *'Great Origin Routes'***:** Development and packaging of core touring routes and sub-routes based on the main traditional circuits, complemented by a range of regional themed sub-routes to appeal to various market segments.

  Key elements: Identifying the core routes and complementary themed routes; auditing routes; mapping routes online and in print; forming route forums with local stakeholders; improving facilities and services on routes.

- *'Tena Yistilign':* An internal awareness and capacity building program to prepare and sensitise the tourism industry and communities towards welcoming visitors and raising the level of tourism awareness and knowledge.

Key elements: Service quality awareness and training program; local interpretive guide training program; national tourism awards.

- *'Ethiopia 'i' Network':* A visitor information improvement program to ensure availability of high quality, well-branded and comprehensive visitor information online, in print and at visitor centres.

  Key elements: Audit and consolidate existing information print materials; Visitor Information Centre (VIC) classification, branding and improvement program.

- *'Meet Ethiopia':* A programme to optimise the power of Meetings, Incentives, Conventions and Exhibitions, especially given the gateway status of Addis Ababa.

  Key elements: Strengthening convention capacity at ETO; various MICE promotion activities.

A sensible and practical implementation approach will be followed during the five-year strategy period and the following approaches and actions will be executed:

- *Following a staged approach to implementation*, with the marketing strategy being implemented over three phases, namely:
  - Consolidation - laying sound marketing foundations (Years 1 and 2)
  - Escalation - stepping up marketing implementation and market growth (Years 3-5)
  - Expansion - achieving consistently high tourism growth (Year 6 and beyond)

- *Strengthening ETO and regional institutional marketing capacity*, recognising that implementing the strategy requires excellent knowledge and specialisation and pursuing a number of institutional success factors, including: strengthening ETO's organisational structure in support of the strategy; improving ETO conditions of employment; outsourcing certain specialist promotion components; appointing market-based representatives in key markets like the UK, Germany and possibly the USA; engaging foreign embassies and missions where appropriate; launching a concerted capacity building program to improve ETO knowledge and skills; and improving marketing capacity of regional Culture and Tourism Bureaus

- *Building strong destination marketing partnerships* by establishing 'Team Ethiopia Tourism' as a formalised marketing partnership initiative between ETO and supportive public and private roleplayers; forming an active Tourism Marketing Committee and workgroups; and agreeing roles and responsibilities between ETO and the regional Culture and Tourism Bureaus, as defined in the strategy

- *Securing adequate funding for tourism destination marketing* by instituting a tourism departure or bed levy, of which the proceeds will accrue to a hypothecated Tourism Growth Fund; and supplementing such funding with self-generated revenues

- *Effective monitoring and evaluation of the strategy* by improving the quality and reliability of tourism arrivals statistics and conducting regular, high quality visitor departure surveys

The strategy includes an *implementation action plan,* which indicates the activities and elements that are to be carried out over the next five years, who should carry them out, broad estimate of cost and measurable success indicators. Importantly, the implementation action plan will serve as a framework for monitoring progress with implementing the strategy and for evaluating the extent of such progress.

Three factors are considered of critical importance for effectively tracking implementation of the plan, i.e.:

- *Mandating a specific individual to take ownership* of implementing the strategy and monitoring progress with the Action Plan
- *Urgent improvements to ensure valid and reliable tourism arrival statistics* for quantifying progress
- Involvement, support and *capacity building of regional Culture and Tourism Bureaus* and involving them in monitoring progress

1 Introduction

The Government of Ethiopia is committed to strengthening the tourism sector and recognises that tourism could play a vital role in creating more jobs and alleviating poverty. It has progressively increased investment in the sector, which it regards as an engine for the overall economic growth of the nation.

This five-year tourism marketing strategy and the associated brand strategy (including a two-year action plan, brand identity and brand disciplines captured in a brand manual) are important initiatives under the Ministry of Culture and Tourism's 'Ethiopia Sustainable Tourism Program, ' ESTDP. The national marketing strategy is complemented by marketing strategies for each of the five targeted regions under ESTDP, namely Amhara, Tigrai, Addis Ababa, Oromia and Southern Nations Nationalities and Peoples (SNNP).

The overall goal of this Marketing and Branding Strategy is to provide the Ministry of Culture and Tourism and the destination development and marketing organisation the Ethiopian Tourism Organisation (ETO) with a well-conceptualised and brand-focused marketing plan, which addresses tourism promotion at the national and regional levels and enables the ETO to achieve the best possible market positioning and demand growth over the next five years, 2016-2020.

The strategy is the result of intensive research and fieldwork including desk analysis, competitor benchmarking, stakeholder interviews and meetings, comprehensive field trips, online and telephonic travel trade surveys and various stakeholder workshops and brainstorm exercises.

The strategy should be read in association with Report 2: Situation Analysis[1] that preceded the strategy formulation phase.

[1] Ethiopia Ministry of Culture and Tourism (2015): *Tourism Marketing and Branding Strategy for Ethiopia, Report 2: Situation Analysis*

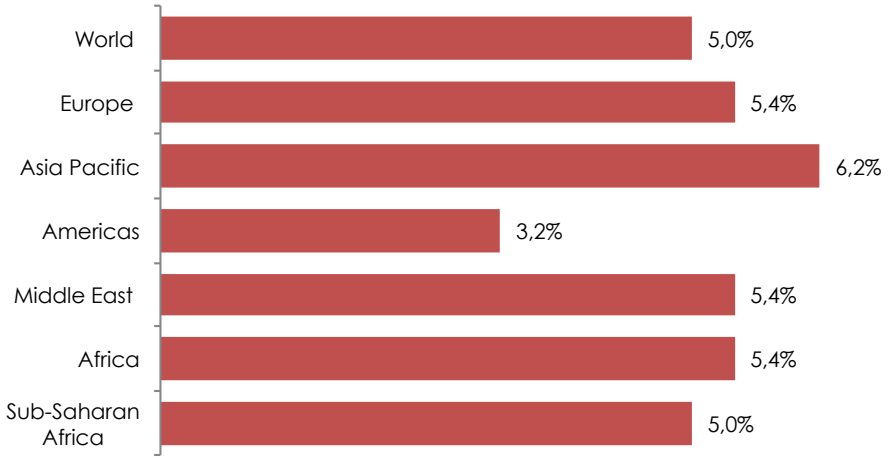
2 International Tourism Trends

The following global tourism performance and market trends are of relevance to Ethiopia tourism.

2.1 Global tourism performance

According to UNWTO [2], international tourist arrivals (overnight visitors) grew by 5% worldwide in 2013, reaching a record 1,087 million arrivals, after topping the 1 billion mark in 2012. Asia and the Pacific recorded the strongest growth with a 6.2% increase in arrivals, followed by Europe and Africa (+5.4%).

Fig. 2.1: Growth in international arrivals (by world region (% change 2013/12))



Source: UNWTO

In 2013, travel for holidays, recreation and other forms of leisure accounted for just over half of all international tourist arrivals (52% or 568 million). Some 14% of international tourists reported travelling for business and professional purposes and another 27% travelled for other reasons, such as visiting friends and relatives (VFR), religious reasons and pilgrimages, health treatments, etc.

In 2013, global tourism receipts grew by 5% in real terms (taking into account exchange rate fluctuations and inflation) to reach US$ 1159 billion. Receipts in Africa were US$ 34 billion (a 3% share) and grew marginally (by 0.6%) in sub-Saharan Africa.

International tourist arrivals have shown virtually uninterrupted growth over the past more than 60 years – from 25 million in 1950 to 278 million in 1980, 528 million in 1995, and 1087 million in 2013.

Worldwide tourist arrivals are expected to increase by an average rate of 3.3% a year over the period 2010 to 2030. The growth rate is expected to gradually slow from 3.8% in 2012 to 2.9% in 2030, however on top of ever-growing base numbers. Total arrivals are expected to reach 1.4 billion in 2020 and 1.8 billion in 2030. Emerging regions will gain market share, for example:

- Asia and Pacific: global share rising from 22% in 2010 to 30% in 2030
- Middle East: global share rising from 6% in 2010 to 8% in 2030
- Africa: global share rising from 5% in 2010 to 7% in 2030. The average annual growth projected for *East Africa is 6.2% between 2010 and 2020,* and 5.5% between 2020 and 2030

Much of this market share growth of emerging regions will be driven by intra-regional travel. The market share of Europe and the Americas will decline; Europe from 51% in 2010 to 41% in 2030 and the Americas from 16% in 2010 to 14% in 2030.

[2] UNWTO (2014): *Tourism highlights*

2.2 Global tourism trends of relevance to Ethiopia

The following key market trends impacting on international tourism are of particular relevance to Ethiopia[3] [4]. These should be regarded as key directions of travel of relevance to Ethiopia and will not necessarily impact on the whole of the international market place.

Global Trend	Implications for Ethiopia
Market trends and preferences	
Authenticity: Search for authentic and life-enriching experiences	• Draw on Ethiopia's hospitable people and age-old traditions, tribal diversities, contemporary culture, cuisine etc. • Ensure brand claims match expectations
Flexibility: More demand for customised travel, special interest experiences and flexibility in searching and selecting a holiday	• Gain knowledge and understanding of customised travel needs and ensure flexibly of promotions, packages and products to match preferences • Simplify travel planning and information provision
Experience seeking: Between 30%-50% of long haul travellers from main sources markets seek out and enjoy a variety of authentic, personal experiences they can talk about and in which they are actively involved, learning something and engaging with locals[5]	• Ethiopia is well-suited to appeal to the 'Experience Seeker' and every effort should be made to diversify the range, quality and creative packaging of the variety of experiences on offer while retaining the authentic character and appeal of resources
Maturity: An ageing population, with travel by seniors (65+) steadily growing and value for money becoming increasingly important	• Already a key market for Ethiopia and the destination needs to further prepare for it • Tailor specific messages and imagery to this market – focus on experiential, healthy and safe travel experiences • Ensure products and packages are fit for the market in terms of comfort and service levels
Youthful discovery: Growing youth travel market: Younger travellers are Internet savvy and tend to prefer locally owned accommodation. Furthermore, they like to learn and generally care about social and environmental issues	• Potentially a growth market • As with the ageing population marketing messages (particularly in social media) and packages could focus on this group • Destination websites and online marketing tools need to be mobile friendly, quick and

[3] Centre for Promotion of Imports (2014): *http://www.cbi.eu/market-information/tourism*
[4] ITB Berlin (2013): *ITB World Travel TRends Report*
[5] http://www.tourism.australia.com/documents/corporate/marketing_experience_factsheet.pdf

Global Trend	Implications for Ethiopia
	informative
Sustainability: Increased concern for sustainability among consumers and tour operators	• Stress the positive benefits to Ethiopia of tourism (both economic and social) as a key brand value • Ensure sensitive product development and respect carrying capacities of fragile natural and cultural resources
Value for money: High-end segments remain a stable market: long-haul travel remains attractive for consumers with high disposable incomes, although with a focus on affordable luxury	• Target consumers with high disposable incomes – the messages need to be about an aspirational experience and value for money
Emerging market growth: BRIC countries (Brazil, Russia, India and China) show high growth, although traditional source markets will remain at the core of global tourism demand	• Emerging markets should be tracked and entered in the medium term
Product, Promotion and Distribution trends	
Accommodation increasingly a key element of the experience: Hoteliers are realising the importance of product differentiation in terms of design, food, service and ambience and are adapting their designs, staff training, interior decoration and added services accordingly	• Expose the accommodation sector to the latest international trends and innovations ranging from branded chains, boutique style hotels, luxury lodge developments, homestays, etc. • Attract international chains to invest or take up management contracts in Ethiopia and gain from their experience
Internet as travel driver: The Internet emerges as an important source of inspiration for new travel destinations, not just for travel research and booking. Rise of travel meta-search engines and online travel agencies with travel bookers opting for one-stop shops, to compare different travel products and packages early in the purchase funnel.	• Ensure excellent web-design, consistent across national and regional sites. Maximise content management and collaboration with private and public sector content providers and booking partners to ensure visitors are able to use the destination website as an encompassing travel portal
Earned media power: Social media has become an integral part of travel planning - before, during and after a trip. Rising importance of online reviews that increasingly influence traveller's decisions to book a specific destination and product. The rise of the travel blogger vs. traditional media. Peer-to-peer travel with the advent of such websites as AirBNB, Uber, Homeaway and Flipkey which has shifted offline	• Ensure social media is a central channel in promotional activity and capitalise on consumer interaction • Incorporate travel bloggers in marketing activity – particularly market based ones • Use of user-generated content on DMO, social media and third-party websites to market the destination

Global Trend	Implications for Ethiopia
travel sales to online travel sales	• Increase personalisation of online experiences through tracking travellers' online search habits and delivering specific travel content that matches this, e.g. logging on to websites using social media profiles
Power of mobile: Travel bookings through mobile platforms are growing to the extent where in 2015, PhoCusWright estimates mobile will account for a quarter of US online travel sales. The convergence of mobile and desktop that means travellers are using various devices to plan their journeys	• Ensure websites and digital communication is mobile friendly and develop mobile applications that provide personalised local experiences and travel ideas based on traveller preference, e.g. Singapore Tourism Board's 'Your Singapore Guide' • Ensure relevant content to appeal across devices
Changing role of tour operators: As consumers are becoming more experienced and online planning and booking is becoming easier and more common, the role and function of outbound operators is fast changing, from being the sole, general travel arrangement channel to being specialists in destination knowledge, advice, seeking out and packaging experiences and activities that suit ever evolving tastes, need, etc., especially for developing destinations like Ethiopia that offer experiential journeys rather than relaxation	• Provide high quality travel trade education programs including online information and training materials, familiarisation visits, workshops etc. • Work with local communities and authorities to develop tourism attractions and services focusing on routes and itineraries to suit various interests and activities
Tour operators becoming more specialised: As the demand for niche experiences like adventure sport, photography, birding etc. grows, operators are becoming increasingly specialised in these areas (See *Addendum E*)	• Get to know and establish sound relationships with the most appropriate outbound operators for selling the various experiences • Specialist staff should be appointed and staff knowledge should be developed in targeted segments

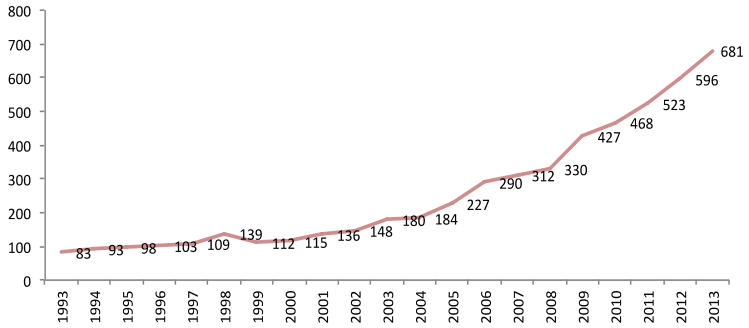
3 Current Situation

This section is based on Report 2: Situation Analysis, which contains a thorough assessment of the current tourism situation in Ethiopia.

3.1 Market performance

The following key performance trends should be addressed in the marketing strategy.

Fig. 3.1: Ethiopia - International Arrivals (1993 -2013)

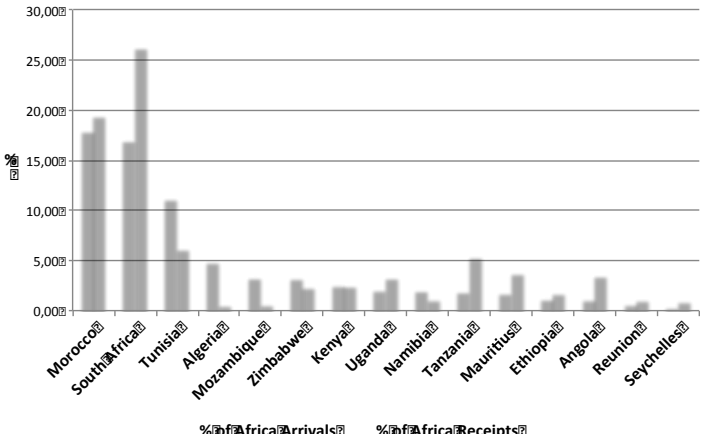


Source: MoCT / UNWTO
Data relates to '000 visits .

Good tourism growth

Ethiopia's tourism arrivals have more than trebled since 2005 from 227,000 to 681,000 in 2013. Tourism receipts have almost quadrupled during this period. In comparison total tourism receipts to Africa increased only 1,5 times over this period and more established destinations like South Africa and Mauritius experienced below average growth in receipts.

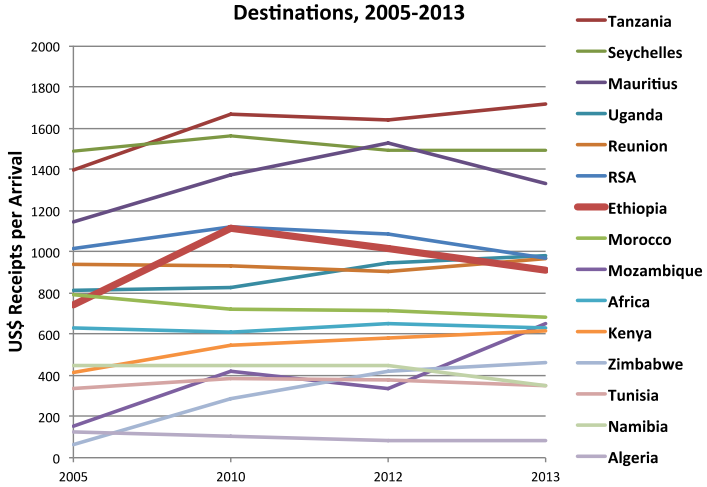
Fig 3.2: Share of Africa's Tourism Arrivals and Receipts: Ethiopia and Key African Destinations, 2013



Small market share

Ethiopia is an emerging destination that currently receives a small share of arrivals and is ranked 12th in terms of tourist arrivals and 10th in terms of receipts in Africa. In East Africa Tanzania, Kenya and Uganda have larger market shares.

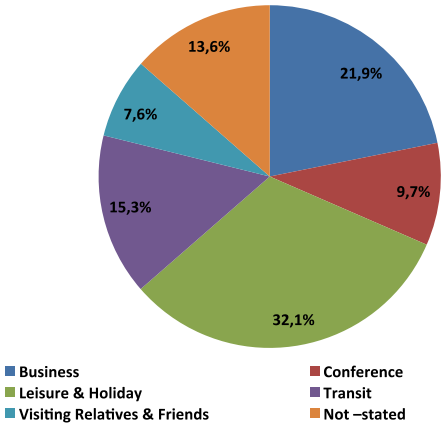
Fig 3.3: Receipts per Arrival (US$), Ethiopia and Key African Destinations, 2005-2013



Moderate yield per visitor

Ethiopia records average receipts of around US$900 per visitors, placing it in the 'average' yield category with Uganda, Reunion and South Africa but above the lower yield destinations like Mozambique, Kenya, Zimbabwe, Tunisia, etc. Tanzania, Seychelles and Mauritius are high yield destinations that earn around US$1,500 and more per visitor.

Fig 3.4: Arrivals to Ethiopia by Purpose, 2012

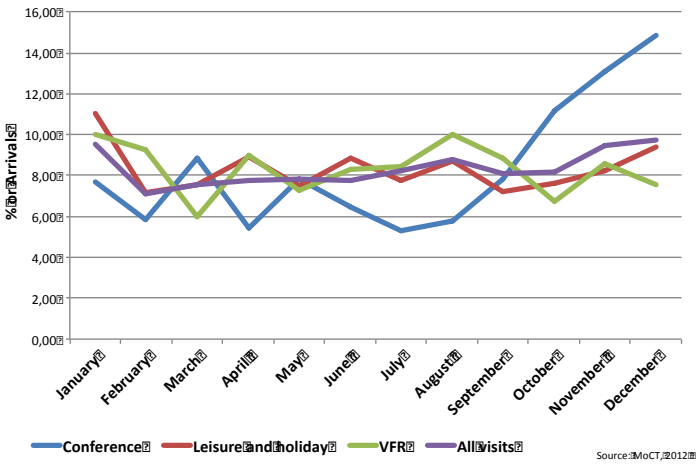


Source: MoCT, 2012

Limited leisure tourism share of arrivals

The share of arrivals contributed by leisure tourism is limited and in 2013 only about one third of arrivals (about 230,000 visitors) visited for leisure purposes.

Fig 3.5: Arrivals to Ethiopia by Month, 2012

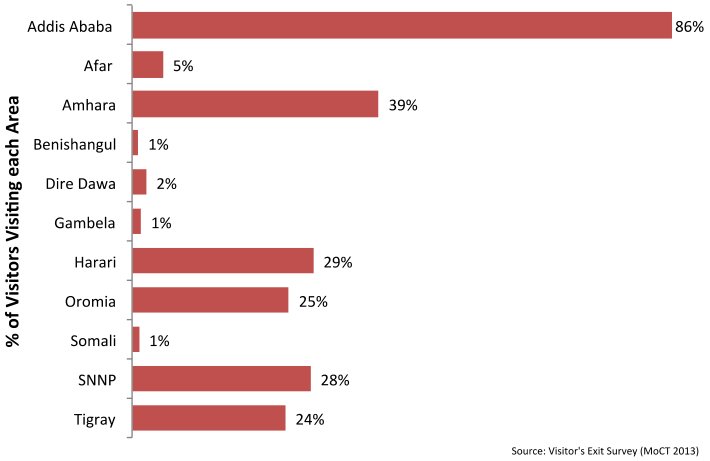


Source: MoCT, 2012

Seasonal consistency

Overall, arrivals to Ethiopia are relatively consistent throughout the year. Such consistent visitor flows support the viability of tourism businesses and sustainable tourism employment. Arrivals for Visiting Friends and Relatives (VFR) are high during the religious festival season in December-January, while conferencing fluctuates with a low season from May to September and a high season from October to December.

Fig 3.6: Regional distribution of Visitors to Ethiopia



Source: Visitor's Exit Survey (MoCT 2013)

Skewed regional distribution of tourism

Due to Addis Ababa's status as an air arrival hub 86% of visitors visit the city. Five other destinations (Amhara, Harar, Oromia, SNNP and Tigrai) receive 25% or more of all visitors, while fewer than 5% of visitors visit the remaining five regions (Afar, Benishangul, Dire Dawa, Gambela and Somali).

In addition to the above:

- Current leisure visitors are slightly skewed in favour of 50-70 years age group, although a significant proportion of visitors fall into the 31-40 years and 41-50 years age groups.

- Gender is skewed (70/30) in favour of male visitors, although indications are that the gender mix is more balanced among leisure visitors.

3.2 Tourism competitiveness

Global competitiveness

The World Economic Forum (2013)[6] ranks Ethiopia 120th out of 140 countries in the travel and tourism competitiveness index. This is based on 14 pillars, which are outlined in the table and figure below.

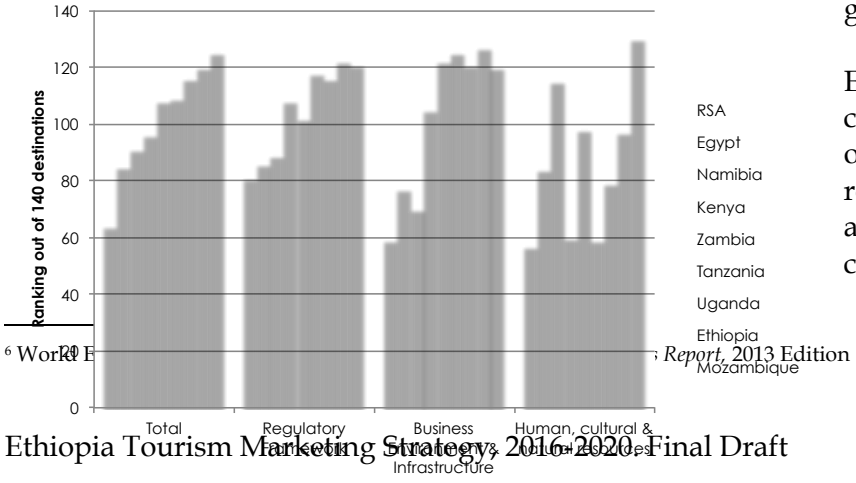
Table 3.1: Ethiopia's scores on the T&T Competitiveness Index

Global Competitiveness Indicators	Global Rank (out of 140)	Score (1-7)
Overall Travel & Tourism Competitiveness Index	120	3.3
Travel &Tourism regulatory framework	122	3.6
Policy rules and regulations	132	3.4
Environmental sustainability	90	4.4
Safety and security	90	4.3
Health and hygiene	118	2.4
Prioritization of Travel & Tourism	115	3.5
Business environment and infrastructure	127	2.7
Air transport infrastructure	90	2.6
Ground transport infrastructure	118	2.8
Tourism infrastructure	135	1.3
ICT infrastructure	138	1.4
Price competitiveness in the T&T industry	22	5.1
Travel and tourism human, cultural, and natural resources	97	3.6
Human resources	126	3
Education and training	126	3.2
Availability of qualified labour	126	4.2
Affinity for Travel & Tourism	120	4.2
Natural resources	33	4.5
Cultural resources	82	2.1

Ethiopia scores well on its *price competitiveness* (which is based on factors like price parity, airport charges, hotel prices) – ranked 22nd in the world – and *natural resources* (based on number of World Heritage natural sites, quality of the natural environment, total known species) – ranked 33rd in the world. Other areas where it scores favourably are cultural resources, environmental sustainability, safety and security and air transport infrastructure.

It scores more poorly in terms of *ICT infrastructure* (based on factors like internet use, mobile and broadband subscriptions, ICT use), *tourism infrastructure* (based on numbers of hotel rooms and ATMs, and major car rental companies) and *policy rules and regulations* (based on a range of measures such as visa requirements, costs to start a business, transparency of government policy making).

Fig. 3.7: Ethiopia Competitiveness Ranking against Selected Competitors in Africa



Ethiopia's relative lack of competitiveness against a number of comparator destinations in the region is summarized in the adjacent chart. Tourism competitiveness is deemed to be on

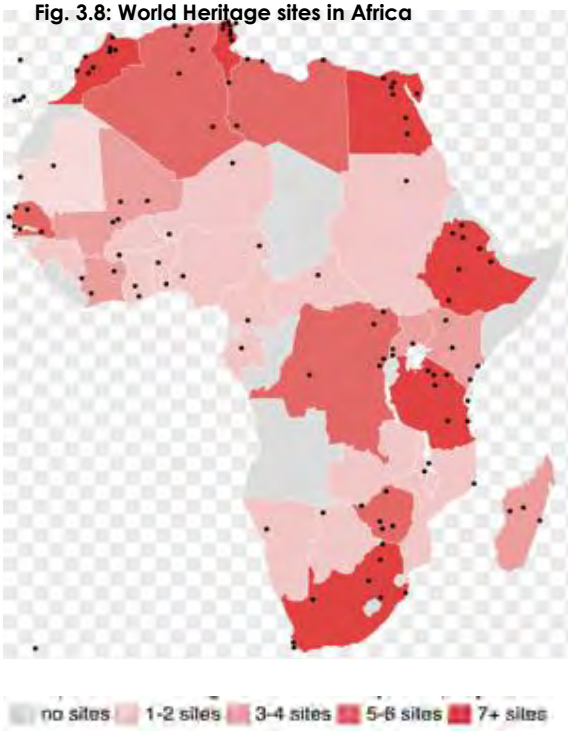
[6] World E… *Report*, 2013 Edition

par with developing destinations like Uganda and Mozambique, but it lags behind more established destinations like Kenya, Egypt, Namibia and South Africa. Ethiopia's limited competitiveness is echoed in a number of studies[7]. These highlight strengths in terms of diversified source markets and market segments, its importance as a diplomatic centre, regional air hub, its complimentary offer with neighbouring destinations like Kenya and Tanzania.

However, various weaknesses in the Ethiopian offer are identified, including:

- Misperceptions about the destination, social conditions, etc.
- Pre-visit informational and destination marketing limitations
- Visa and customs issues
- Limited quality of accommodation, restaurants, and visitor attractions
- Limited quality and variety of activities, crafts and gifts
- Challenges of getting around in the country
- Inconsistent quality of inbound operators and tour guides
- Destination planning, and investment challenges
- Human resources challenges
- A lack of market intelligence

Fig. 3.8: World Heritage sites in Africa



Competitor analysis

The competitor analysis focuses on key tourism destinations of similar or larger scale than Ethiopia in East and Southern Africa and the Gulf region. These include Jordan, Egypt, Kenya, Tanzania, Uganda, and South Africa. A comparison of Ethiopia's advantages and disadvantages relative to these competitors is presented in Figure 2.5 below and reveals the following:

- In terms of *unique, iconic sites* to visit i.e. places declared as UNESCO World Heritage Sites (see adjacent figure), Ethiopia is on par with Egypt, Tanzania and South Africa and is better placed than Jordan, Kenya and Uganda
- Ethiopia's rich *cultural diversity, ancient cultural practices and its unique cultural character* that spans both the Arabic and Africa world provides it with distinct advantage over all other competitors
- Similarly the *outstanding hospitality, friendliness and peacefulness of the people* is a distinguishing feature that sets the destination apart from all other competitors
- Ethiopia is only exceeded by Egypt when it comes to *historical sites and relics*. It is on par with Jordan and more attractive than other Eastern and Southern Africa destinations in this regard

[7] These include:

- ODI (2009): *Enhancing private sector and community engagement in tourism services in Ethiopia*
- World Bank Group (2012): *Ethiopia's tourism sector: Strategic paths to competitiveness and Job creation*, in association with MoCT
- ETO (2014): *Preliminary identification of weaknesses/problems of the tourism sector in Ethiopia*

- Concerning *scenic beauty and natural features* Ethiopia outperforms all regional competitors except South Africa

Fig. 3.9: Competitor comparison of regional competitors vs. Ethiopia

REGIONAL COMPETITORS	Kenya	Tanzania	Egypt	Uganda	Jordan	South Africa
Selling proposition	**Classic safari, affordable mass beach**	**High end safari, beach, & adventure**	**Ancient history, mass beach**	**Ecotourism and adventure**	**Ancient history, high end wellness**	**Contemporary Africa, nature & scenery**
Volume: ('000 arrivals 2013) Ethiopia = 681 **Yield:** (USD/arrival) Ethiopia = USD 909 **Value Point**: Ethiopia = Medium-high	**1,433** **617** **Low-Medium**	**1,063** **1,768** **High**	**9,174** **659** **Medium**	**1,206** **982** **Medium-high**	**3,945** **1,043** **Medium-High**	**9,537** **968** **Medium-high**
Factors of competitiveness						
TOURISM RESOURCES						
Unique sites/Iconic experiences						
Wildlife and safari						
Cultural uniqueness/people						
Historical sites and relics						
Scenic beauty and natural features						
City life and conferencing						
People hospitality, peacefulness						
Contemporary man-made attractions						
TOURISM SUPPORT SERVICES						
Hospitality (accommodation, catering)						
Land transport						
Air access						
DEMAND CONDITIONS						
Size/proximity of major markets						
Value for money						
Ease of arrangment and purchase						
Image of health, safety						
INDUSTRY CAPACITY						
Human resources						
Tourism entrepreneurship/innovation						
Tourism institutions and funding						
Colour Key:	**Ethiopia at an advantage**		**Ethiopia Equal**		**Ethiopia at a disadvantage**	

- In terms of tourism support services and demand conditions Ethiopia's main competitive advantages are its *excellent air links and value-for-money*, two major advantages
- Ethiopia is at a *disadvantage* concerning wildlife and safari, city life and conferencing and contemporary man-made attractions
- Factors that *constrain the country's tourism competitiveness* are limited hospitality facilities, land transport limitations, difficulty of planning and booking travel and most importantly the limited human resources and institutional capacity to operate, develop and promote tourism
- While *image barriers* related to personal health and safety are real, such perceived risks are even more relevant to competitors such as Kenya and Egypt and are of equal concern in Uganda, Jordan and South Africa

3.3 Marketing strengths, weaknesses, opportunities and threats (SWOT)

The following abridged SWOT analysis should be read in conjunction with the detailed assessment contained in *Addendum A*.

Strengths	Weaknesses
Positioning	
• Growing, positive global country awareness and recognition • Excellent resources for tourism growth • Good recent tourism growth • Tourism is a Government priority • Consistent visitor flows through the year • Above-average length of stay • Good visitor safety	• Limited global awareness of Ethiopia as tourism destination • Prevailing market misperceptions • Fragmented and unclear brand image • Limited leisure visitor share • Moderate receipts per visitor • Tourism infrastructure and service weaknesses • Tourism is concentrated in a few areas • Visitor health and hygiene factors require improvement
Product	
• A broad range of globally recognised tourism landmarks, including World Heritage Sites • Unique cultural and religious events with tourism potential • Exceptional special interest products, e.g. birding, anthropology, adventure sport • Some examples of excellent community-based tourism experiences, such as community guiding, trekking, cultural interactions, etc.	• Inadequate range and quality of commercial leisure tourism facilities and services • Insufficient product interpretation and packaging • Gap in visitor infrastructures and services • Lack of a tourism events strategy and calendar • Community-based tourism projects need more support to ensure their sustainability
Promotion	
• Some good printed marketing collateral • Public-private partnership initiatives in trade fairs between ETO, Ethiopian Airlines and tour operators	• Limited destination promotional initiatives • Marketing operations mostly geared at traditional segments, methods and channels • Major lack of digital promotion • Disjointed imagery and promotional materials • Tourism fair attendance lacks a clear strategy
Place/distribution	
• Expansive network of regional tourist information offices • Excellent air connectivity • Loyal but limited travel channel support	• Tourist information offices in need of support and refurbishment • Poor travel trade awareness and knowledge • Immature local tour operator channel • Poor internet connectivity
Price	
• Moderate value for money with some good value aspects	• Relatively high local transport costs • Some price inconsistency and fragmentation
People	

• Friendliness and openness of citizens a major advantage	• Local awareness of tourism lacking • Limited marketing capacity and skills
Processes	
• Good marketing institutional model • Basis laid for public-private partnership • Exit surveys are a good start to improved market intelligence	• Weak ETO and regional marketing capacity • Inadequate marketing funding • Poor foothold in target markets • Limited public-private marketing partnerships • Inadequate market measurement and research
Opportunities	**Threats**
Positioning	
• Capitalising on favourable global trends of the growing experiential travel market • Strong brand themes to be promoted • Developing MICE tourism • Promoting Ethiopia's 'new beginnings'	• Destruction of fragile environmental resources • Potential local and East Africa natural and human crises
Product	
• Packaging largely unexplored but unique experiences • Deepening and intensifying the journey	• Inability to manage visitor pressures • Slow investment take-up in upmarket facilities and products in leisure areas
Promotion	
• Leveraging latent market segments • Promoting domestic tourism • Expanding the range and quality of experiences offered to flexible and independent traveller segments • Capitalising on Ethiopia's popularity with the more mature visitor • Capitalising on East Africa complementarity • Partnering commercial travel guides • Producing high quality promotional tools	• Continued poor internet connectivity and inability to adapt to communication technologies
Price	
• Continuously improving value for money	• Danger of 'expensive' perceptions
Place/distribution	
• Increasing collaboration with Ethiopian Airlines	• Inadequate adaptation to online marketing dynamics and channels
People	
• Retaining and building on the authentic hospitality of the Ethiopian people	• Negative social and cultural impacts of unmanaged tourism and other commercial developments
Processes	
• Building a strong Team Ethiopia Tourism marketing partnership	• Continued underfunding and under-capacity of ETO

4 Future Vision

4.1 Vision 2025

Ethiopia ranks among the top five destinations in Africa in tourism revenues, with tourism having a sustainable, highly positive impact on Ethiopia's economy and its socio-cultural and environmental landscape

4.2 Objectives

The following growth objectives are set for the period 2016 – 2025, in pursuit of the vision[8].

- Increase tourism arrivals by an average annual rate of 13% per annum to 3 million
- Increase receipts per visitor by an average annual rate of 1,6% per annum to US$1,100 (at current prices)
- Increase total tourism receipts by an average annual rate of 15% per annum to US$3,4 billion (at current prices)

4.3 Principles

In marketing Ethiopia the following three principles will underpin all actions and activities:

Authenticity

The authentic lifestyle, culture and physical environment are important brand assets and tourism growth will be managed to preserve such authenticity.

Sustainability

Ethiopia's environmental, historical and cultural attractions are fragile and marketing, visitor management and product developments will be conducted in pursuit of their sustainability.

Social sensitivity

[8] Based on UNWTO (2015). The growth objectives are based on the visions for Ethiopia to rank fifth in tourist revenues. The assumptions underpinning objectives are a) that tourism arrivals to other African countries will increase at the same average growth rates as those achieved over the period 2010-2013 and b) that average receipts per visitor will remain at current levels for all other African countries

The social and tribal traditions of Ethiopia's people have been maintained over centuries and tourism will be managed and promoted with care and sensitivity to retain and conserve these.

4.4 Marketing success factors

Based on the situation and SWOT analysis, the following eight factors are considered of critical importance for achieving the growth objectives:

1. Achieving high levels of brand recognition

Promote a compelling and differentiated tourism positioning and brand identity and project a complementary 'house of brands'.

2. Focusing on high-yield tourism markets

Be 'value' rather than merely 'volume' driven, with an emphasis on optimising tourism revenues and jobs and focusing marketing resources on higher-spending leisure and business tourism markets with a high probability of conversion.

3. Diversifying the range and of tourism products and experiences and packaging these to suit the needs and tastes of target markets

Capitalise on fast diversifying global traveller markets by expanding the range of tourism attractions and commercial products and improving the packaging and presentation of experiences to suit varying traveller interests.

4. Stepping up destination promotion

Launch a coordinated and multi-faceted international and domestic leisure marketing drive, applying a mix of promotional actions and capitalising on the growth in online travel planning and purchasing.

5. Striving for service excellence and value for money

Improve product and service quality and value for money of both private and public tourism facilities and services provided to tourists.

6. Building a vibrant marketing partnership

Establish 'Team Ethiopia', a strong and vibrant national-regional and public-private marketing partnership, to maximise marketing impact.

7. Strengthening human, online technology and financial marketing capacity

Strengthen human capacity, online technology and financial marketing capacity of ETO, Regional Tourism Bureaus and tourism communities.

8. Measuring and monitoring results

Improve market measurement, monitoring and knowledge including data collection, analysis and reporting.

5 Growth Foundations

The following section sets out the main foundations that underpin the vision and objectives. These are:

- A differentiated market positioning
- A brand of distinction
- High-yielding target source markets and segments
- Products and experiences that match market needs

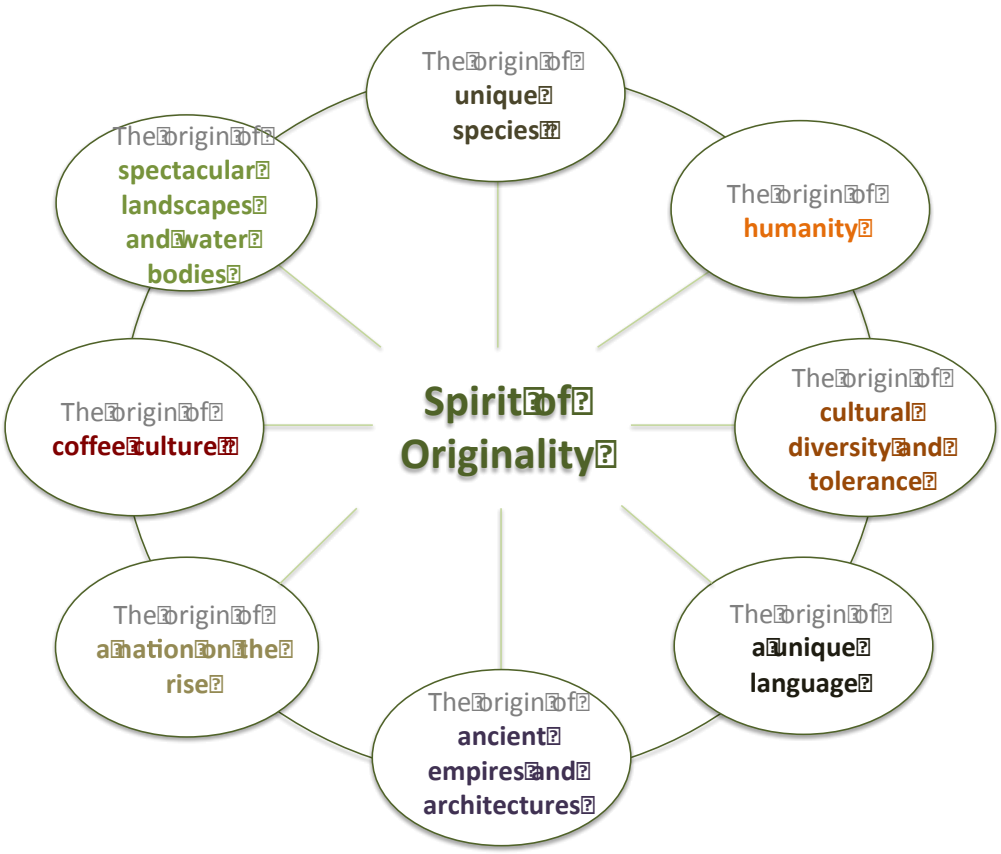
5.1 A differentiated positioning

Ethiopia is as 'original' as it gets; authenticity is engrained in the lifestyle, landscapes, nature, history and heritage; in addition the hospitality of Ethiopia's people towards each other and visitors is unique. Visitors are attracted and fascinated by this 'spirit of originality', which may be attributable to various factors, including the fact that the country has never been colonised, the geomorphological forces that have carved unique land and life forms, the confluence of cultures and religions and other factors.

This 'Spirit of Originality[9]' presents Ethiopia with a unique selling proposition and a strong call to action for travellers to explore the many 'origins' to be found all over the country.

Fig. 5.1: Ethiopia's Differentiated Market Positioning

[9] The positioning statement should not be confused with a brand slogan; it presents the point of differentiation based on which Ethiopia will be promoted and will be translated into a marketing brand



Some key implications of this positioning for the marketing strategy are:

The journey is the destination: Ethiopia is primarily a travel destination for experiencing and learning, more so than a holiday destination for relaxation. This has implications across the entire tourism value chain ranging from visitor access and mobility to community involvement.

The target market is the experience seeker: Those who want more out of a trip than looking, sitting and eating; who prefer to see, touch, and taste and engage with the 'spirit of place'. Being targeted and focused on such travel segments is an important requirement for achieving rapid and sustainable tourism growth.

The experience needs development and packaging: The variety of attractions and experiences in Ethiopia are spread across the country and access to, availability and quality of visitor services vary considerably from place to place. Product packaging and improvement are of critical importance. Presenting such attractions and experiences to visitors requires a strong public-private partnership, with private investors developing commercial facilities and services, private tour operators linking experiences and attractions as itineraries that can be sold to visitors and public tourism bodies promoting travel destinations and routes, providing public visitor services and improving sites.

The brand is layered: The 'spirit of originality' is a multi-facetted positioning and expressing it as a captivating brand identity and architecture that inspires across market and product segments is important.

5.2 A brand of distinction

The following diagram summarises the brand promise and brand essence of Ethiopia. It should be read in conjunction with the *Ethiopia Brand Strategy* and the *Ethiopia Tourism Brand Manual*, which set out the brand identity comprehensively.

The brand 'story' can be summarised as follows:

If you desire the freedom to find out who you are through exploring the world with the goal of experiencing a better, more authentic, more fulfilling life, then Ethiopia is a part of your journey.

For Ethiopia will give you such a wealth of discovery that your curiosity will be stimulated and satisfied in a continual cycle of anticipation and reward.

Ethiopia invites you to discover why it is the origin of so much history and culture, vibrantly alive in a landscape of dramatic beauty.

As you travel across her great heights and deep places you experience the origins of humankind and of species, of spirituality and of civilisation. You will meet her people and they will welcome you and you will experience the origin of tolerance and the origin of a value system that helps you rediscover humanity. Make the time to share a pot of coffee and you will find out about the origins of trade, of power and of independence.

Make the time to explore Ethiopia and you will even understand the origin of time itself.

Fig. 5.2: The Brand Promise and Essence

Self-analysis	Stakeholder analysis	Competitive analysis
Ethiopia is **the origin of so much**: from humankind, to civilisation, from natural tolerance of diversity to the global coffee culture – from the profound to the sensual – all supported by the regions.	Ethiopia is the origin of so much: a **history** that is a mysterious mixture of fact, myth and legend; a **culture** that is vibrantly alive that finds its proud roots in the history; and a dramatic **landscape** that is primal in its extremes.	Ethiopia is **an adventure** in which **Ethiopians** will **welcome your participation**, involving you in their **rich past** and inspiring you with a **future full of potential**.

Ethiopia's tourism brand promise

Ethiopia invites you to discover why it is the origin of so much history and culture, vibrantly alive in a landscape of dramatic beauty.

Ethiopia tourism brand essence

LAND OF ORIGINS

The overall unifying idea

The origin of so much, from humankind, to civilization, from tolerance of diversity to the strength of unity, in a place of dramatic beauty – all supported by the regional brand promises that substantiate this claim.

Addis Ababa: Hub of African diplomacy: This vibrant, entrepreneurial and historically significant city is a hub of African commerce and diplomacy.

Afar: Birthplace of humankind: This strange, otherworldly landscape, which is still giving birth to itself, also gave birth to humankind.

Amhara: Soul-enriching wonders: The ancient mysteries of Lalibela, spectacular landscapes of the Simiens, imperial architectures of Gondar and source of the Blue Nile at Lake Tana touch the heart and soul.

Benishangul-Gumuz: Essence of power: Providing the power to drive a thriving nation, through a combination of a dramatic landscape with strong flowing water and, most importantly, the will of the people.

Dire Dawa: Crossroads of trade: An economic and rail hub where traders and travellers have always been welcome.

Gambela: Where species congregate: A place of natural wonder where the great migrations give one an understanding of the inevitability of evolution.

Harari: The living museum: Where the peast embrances the present

Oromia: Humanity and nature in unity: In this dramatic landscape of deep places, great heights and cool lakes you will discover a value system on which humanity is founded.

Somali: Never-ending horizons: In this space of far horizons you will rediscover your own growth.

Southern Nations: Cultural mosaic: A colourful mosaic of cultures united in their diversity by a unifying love of their ancient and bountiful land.

Tigrai: Roots of civilization: The beginnings of civilisation founded in a history of empire that goes back to a time of legends.

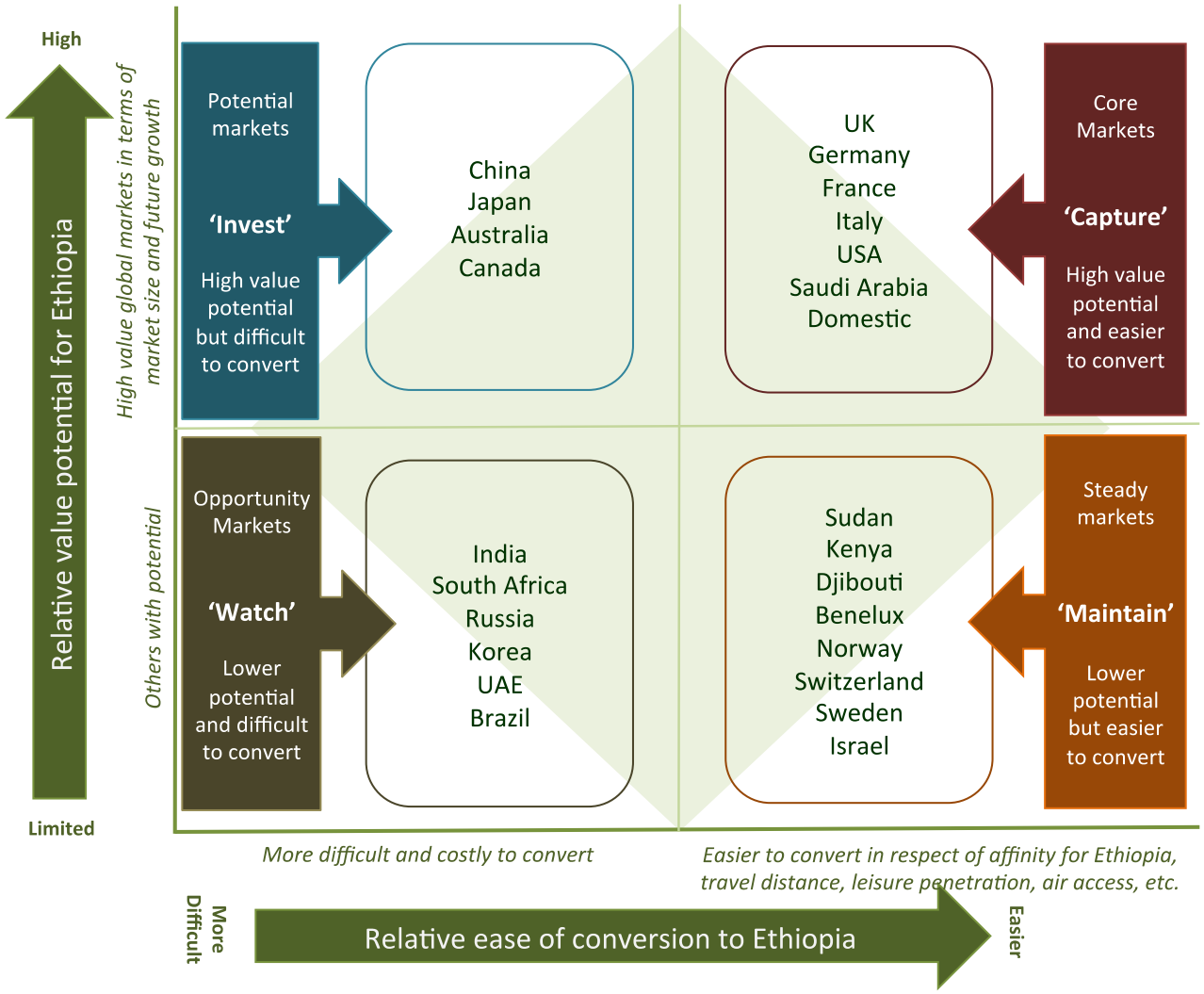
5.3 High-yielding target source markets and segments

The following section set out the target market strategy in terms of both source markets and market segments. This section should be read in conjunction with the more detailed market analysis presented in *Addendum B.*

Source markets

Potential source markets were analysed in terms of their tourism value potential on the one hand and the relative ease of attracting them and converting such potential to Ethiopia on the other. Results are as follows:

Fig. 5.3: Target Source Markets and Approaches


High
Relative value potential for Ethiopia
Limited
High value global markets in terms of market size and future growth
Others with potential
Potential markets
'Invest'
High value potential but difficult to convert
China
Japan
Australia
Canada
UK
Germany
France
Italy
USA
Saudi Arabia
Domestic
Core Markets
'Capture'
High value potential and easier to convert
Opportunity Markets
'Watch'
Lower potential and difficult to convert
India
South Africa
Russia
Korea
UAE
Brazil
Sudan
Kenya
Djibouti
Benelux
Norway
Switzerland
Sweden
Israel
Steady markets
'Maintain'
Lower potential but easier to convert
More difficult and costly to convert
Easier to convert in respect of affinity for Ethiopia, travel distance, leisure penetration, air access, etc.
More Difficult
Relative ease of conversion to Ethiopia
Easier

The following approaches will be followed:

PRIORITIES	COUNTRIES	STRATEGY	PROMOTION APPROACH
Core markets High revenue potential, an affinity for leisure travel to Ethiopia and are easier and less costly to penetrate	• UK • Germany • France • Italy • USA (East and West Coast areas) • Saudi Arabia (Middle East climatic summer resort breaks) season) • Domestic	**Capture** Focus most promotional activities here in the short and medium term Apply 70% of marketing resources	Apply the full promotion mix including: • A major PR and media drive • Strong digital advertising and social media focus with matching language content • Attendance of suitable travel trade and consumer fairs • Major trade education and joint promotions drive with inbound and foreign operators • MICE sales and trade fairs • Selective consumer advertising These are priority markets for ETO in-market representation
Potential growth markets High revenue potential, low incidence of leisure travel to Ethiopia and more difficult and costly to penetrate	• China (focus on '2nd wave' experiential travellers) • Japan • Australia • Canada	**Invest for growth** Focus some promotional activities here in the medium term towards growing these into the core market portfolio in the longer term Apply 20% of marketing resources	Selective activities e.g.: • Selective travel trade and media education and familiarisation program • Selective travel trade joint promotions with inbound and foreign operators • Major online drive through language content expansion (China, Japan) and suitable social media channels ETO to engage in promotional activities with Ethiopian Diplomatic missions and Ethiopian Airlines in these markets
Steady markets[10] Lower revenue potential, an affinity for leisure travel to Ethiopia and are easier and less costly to penetrate	• Benelux • Sweden/ Norway • Switzerland • Sudan • Kenya • Djibouti • Israel	**Maintain** Focus limited promotional activities here aimed at increased penetration by strengthening existing travel trade relations to ensure expansion and deepening of packages Apply 10% of marketing resources	Mainly information provision and education, including: • Providing Africa-focused and special interest travel trade with product updates and information • Leveraging suitable online channels and content to make it easy for travellers to access information online Communication with travel trade in collaboration with local inbound operators and via diplomatic missions in these markets
Opportunity markets Lower revenue potential, low incidence of leisure travel; more difficult to	• India • South Africa • Russia • Nigeria • Brazil • Korea	**Watch** Leverage ad-hoc marketing opportunities Use spare resources only to support	Marketing activities will depend on the nature and extent of opportunities that emerge

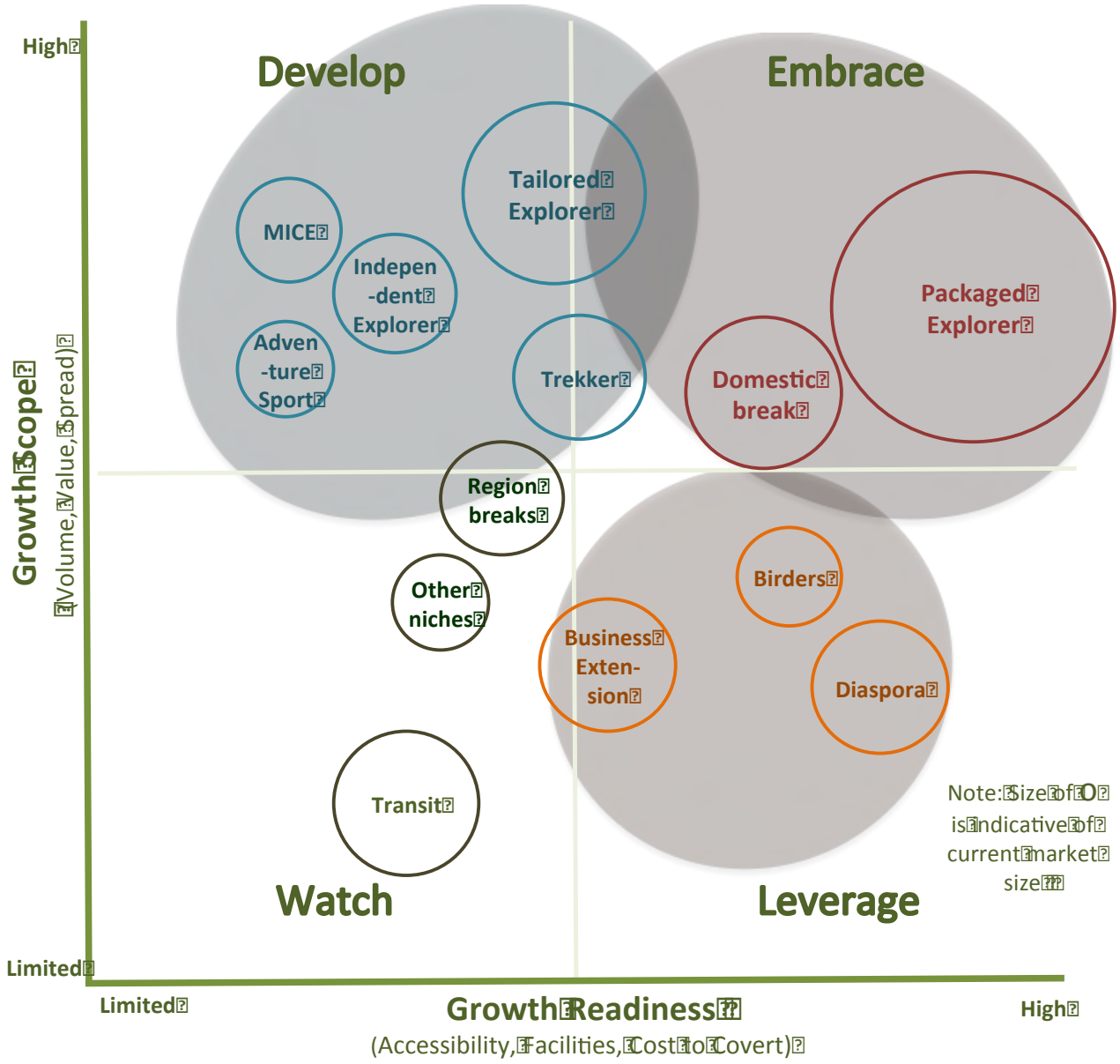
[10] Benelux and Scandinavia (as collectives) are attractive markets and could move to core markets should resources allow

penetrate	• UAE	partners	

Target segments

Various current and potential market segments were identified through focus group discussions, tour operator interviews, desk research and stakeholder workshops. These were evaluated based on their indicative scope for growth (in terms of value, volume and ability to spread tourism around) and Ethiopia's readiness for such growth in terms of access to experiences, tourism facilities for these segments and cost of reaching them. Priorities are presented as follows:

Fig. 5.4: Target Market Segments and Approaches



The following approaches are recommended regarding the various segments. Detailed profiling of each market segment, including demographics, travel desires, main interest and locations in Ethiopia and awareness and booking channels is attached as *Addendum B*.

Market segment and profile	Marketing approach
'Embrace' segments (60% of resources)	
Packaged explorer: Cautious 'soft' exploration as part of a packaged group tour, visit mainly the key cultural and historical attractions on the traditional northern and southern circuits and sites	Apply a full mix of promotional elements and focusing on media awareness, travel trade education and promotion
Tailored explorer: Confident 'soft' exploration on a tailor-made itinerary, want to delve deeper and veer off the traditional circuit based on personal preference, organised, with some local interaction	Focus on specialist travel trade and media education and promotion and increased online media exposure
Trekkers: Always in search of new mountainous and other topographical, exotic landscapes to hike like Simien Mountains, Bale Mountains, Gheralta, etc. (See *Addendum E*)	Focus on education and promotion to specialist trekking and hiking operators and online media exposure in outdoor publications and online hiking platforms
Domestic and regional breaks: Affluent locals and expatriates taking weekend and short breaks to spend quality time relaxing	Develop special price packages for the domestic market, packaged and sold by private travel agents, tour operators and suppliers. Use full promotional mix including TV, print and online media
'Develop' segments (30% of resources)	
Intrepid explorer: Confident 'hard' exploration on a flexible, largely independent itinerary and in search of extraordinary experiences - prepared to sacrifice comforts to go to less visited places experiences	Major focus on online, digital communication and leveraging social media, communicate exceptional 'stories', sites and experiences
MICE: Meet and discuss with colleagues issues of mutual concern, in a professional and interesting environment with opportunities for local, high quality experiences. Mainly Addis Ababa (see *Addendum D*)	Focus on engaging conference buyers, associations and conference organisers to create awareness of Ethiopia as MICE destination Create an online inventory of venues, services
Adventure sport enthusiasts: A collective segment of specialised niche adventurous outdoor sport enthusiasts, e.g. cross-country and endurance running capitalising on Ethiopia's celebrity athletes and could be expanded to cycling, motorcycling, mountain biking, overlanding, climbing, canoeing or kayaking.	Major focus on online, digital communication and leveraging social media; communicate exceptional sites for various activities; engage with associations and clubs
'Leverage' segments (10% of resources)	
Birders: Focused travel to see endemic species (and other bird species) and adding them to personal birding lists. Simien and Bale Mountains, Awash National park, Lakes of the Rift Valley (see *Addendum E*)	Focus on extending the stay into other areas and non-birding destinations. Communication via birding operators and exposure on online birding sites and social media platforms
Business extension: Extending the primary business trip to experience Ethiopia's leisure attractions	Focus on extending the stay into leisure tourism areas. Communication via business chambers and larger corporates
Other niche segments: Various small segments of specialists visiting Ethiopia for its unique features in particular areas like antiquities, religion and pilgrimage, archaeology, palaeontology, geology, anthropology, art,	Provide information on the official website and empower and educate staff to be able to support special interest practitioners and visitors with advice and information. Do this in

Market segment and profile	Marketing approach
etc.	collaboration with academics and specialists

5.4 Products and experiences that match market needs

Figure 5.5 below indicates the appeal of experiences and attractions for the various target market segments. Overall, the following patterns are evident:

- *Historical sites and structures* appeal strongly to all three Explorer market segments, based on the fact that the archaeological sites, churches, monasteries, mosques and rock-hewn churches offer opportunities for both 'hard' and 'soft' exploration
- *Eco and environmental attractions*, especially the scenery, mountain walking, unique wildlife species and unique landforms appeal across a range of more active market segments and are especially attractive for Intrepid Explorers and Trekkers
- While general *cultural interaction* appeals across all segments, 'deeper' cultural experiences like tribal traditions, community-based tourism experiences, interactive food and coffee experiences, craft heritage etc. have high appeal for Intrepid Explorers and significant appeal for Tailored Explorers
- *Lifestyle and entertainment* experiences are of specific importance to the Domestic and Regional short-break market but appeal also to the Tailored Explorer market.

From a target market perspective the following product approaches are recommended:

Market segments	Product approach	Experiences and sites

Packaged Explorers	*Focus on visitor convenience, management and interpretation at key historical sites on the traditional circuit*
	• Ensure visitor safety e.g. walkways, viewing platforms, safety railings, etc.
	• Promote investment in tourist class hotels, guest houses and other facilities
	• Improve visitor facilities at key sites (toilets, curio and snack shops, shaded seating, etc.)
	• Improve visitor management e.g. information, ticketing, capacity management and impact monitoring
		• Northern areas
		  ○ Monasteries on Lake Tana, the Blue Nile Falls and surrounds
		  ○ Gondar and surrounds (Guzara, Gorgora & Falasha village)
		  ○ Simien Mountains National park
		  ○ Aksum and surrounds
		  ○ Lalibela and its surrounding rock churches
		  ○ Debre Libanos Monastery
		• Southern areas
		  ○ Arbaminch area (Nechisar NP and Lake Chamo)
		  ○ Dorze village
		  ○ Konso cultural Landscape
		  ○ South Omo ethnic groups
		• Eastern areas
		  ○ Harar (Jogol) and Dire Dawa

Domestic Breaks	*Focus on entertainment, relaxation and socialisation* • Promote investment in domestic resort areas • Develop a calendar of events, stimulating the development of sport and entertainment events (music festivals, running, cycling, food festivals, etc.).	• Bahir Dar and Lake Tana • Bishofto, Lagana and other lakes • Mekelle City and Museum

Market segments	Product approach	Experiences and sites
	• Develop local picnic and camping areas	
Tailored Explorers	*Focus on diversifying the range, quality and depth of experiences on offer* • Expand investment in higher-quality hospitality facilities services at key sites • Improve quality of transport and hospitality services at key sites, also outside the main circuit e.g. Harar, Bale Mountains, Omo Valley, Western Ethiopia, Afar, etc. • Major focus on improved interpretation, guiding and personalised services	*Experiences for Packaged Explorers plus:* • Northern areas o Kossoye area o Ankober Area o Auramba community o TESFA community tourism, North Wollo[11] o Village tour in Simien Mountains o Al – Nejashi tomb and mosque o Mekelle City and Museum o Danikel and Afar • Southern areas o Rift valley lakes o Bale Mountains National Park and Harenna Forest o Lake Hawassa (birding area) o Community-based tourism e.g. Wenchi community tourism, Dorze weavers and potters project, Lake Ziway community tourism, etc.
Intrepid Explorers	*Focus on packaging extraordinary experiences and circuits*, especially environmental and cultural • Major drive to support and improve the extent and quality of community-based tourism • Develop and package experiences and circuits beyond the known areas • Critical to retain authenticity of experience	*Experience for Packaged and Tailored Explorers plus:* • Northern areas o Community tourism around Adigrat and Gheralta o Atsibi cluster of rock churches o Lesser explored areas of the Danikel and Afar • Southern areas o Sof Omar cave and other cave systems o Yabello wildlife sanctuary o Borena Dublock singing well o Stele's (Tiya, Tutiti and Tutifala) o Adaba – Dodola community tourism • Western areas o Jimma and Kafa (coffee area) • Various lesser know national parks e.g. Borena Sayint, Abiata-Shala, Nechisar, Gambela, Babile elephant reserve, etc. • Benishangul traditional gold mining

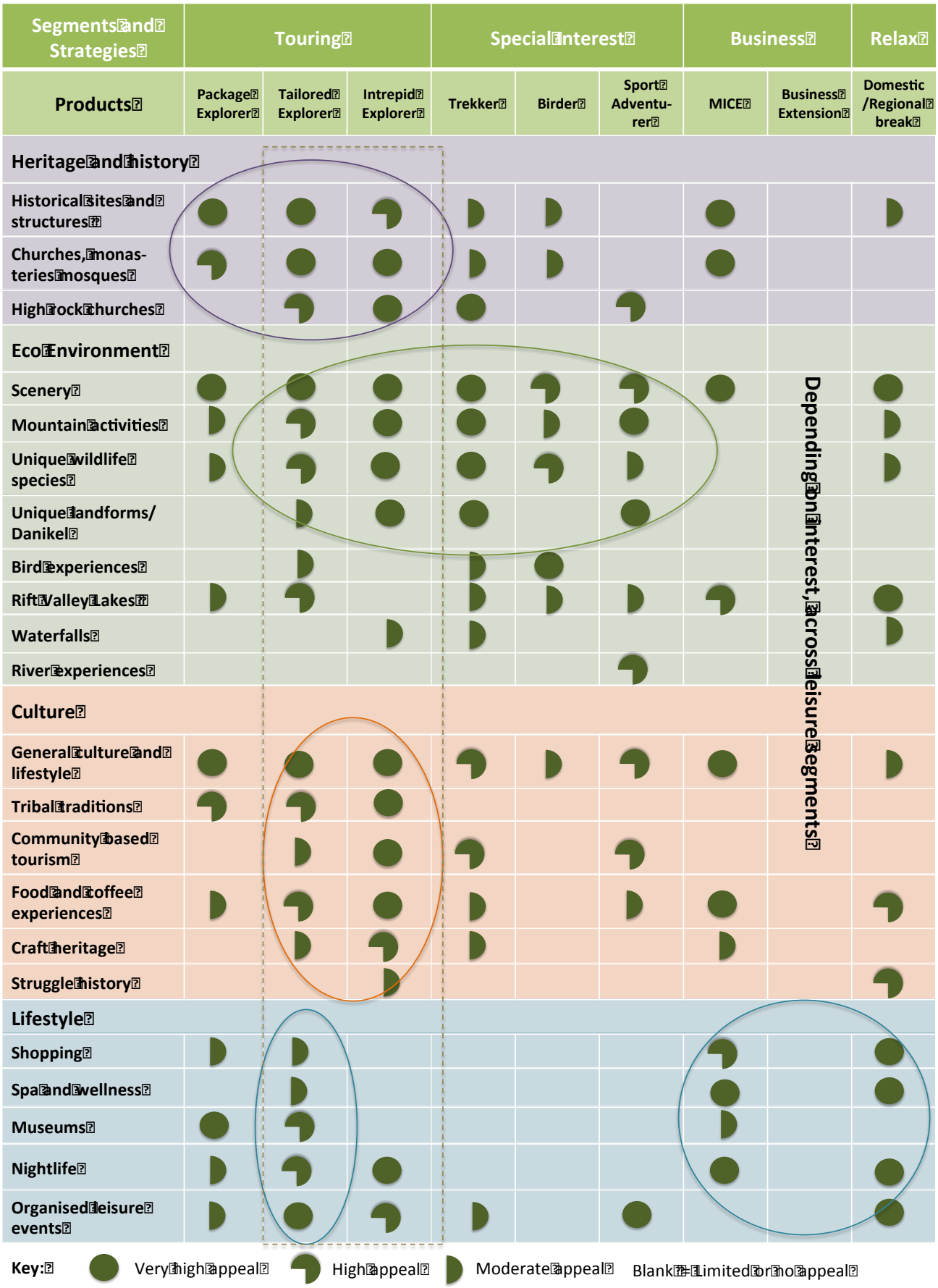
[11] Tesfa Tours works with around 12 communities in North Wolo and has developed a trekking programme for tourists who wish to get off the beaten trail, trek on foot or on horseback in breathtaking scenery and experience the real culture of the highlanders by staying in guesthouses owned and operated by community members

Market segments	Product approach	Experiences and sites
		• Somali

Special interest markets: Trekkers, Birders, Adventure Sport Enthusiasts	*Focus on packaging special interest experiences and improved community hospitality*
	• Diversify trekking routes and improve trekking lodges, guide services, local community hospitality
	• Develop bird hides and promote community bird guiding
	• Develop and support adventure sport events (long-distance running, rafting, cycling, rally's, etc.)
	• Identify and package adventure activities including guide training, safety measures and guidelines, etc.
		• Northern areas
		  ○ Simien mountains trekking trails
		  ○ Gheralta and Adigrat trekking area
		  ○ Wanzaye Hot Spring and birding site
		• Southern area
		  ○ Bale Mountains and Adaba-Dodola mountain trekking
		  ○ Negele Borena birding area
		  ○ Gibe Valley birding site
		  ○ Wondo Genet birding site
		  ○ Omo National Park
		  ○ Mago National Park
		• Chebera Churchura National Park
		• Yirga Chefie and Yirgalem coffee area

MICE	*Focus on building capacity for hosting and expanding the MICE industry* • Marketing focus on existing international convention centre facilities, such as EU and AU for example United Nations (Economic Commission for Africa) Conference Centre, African Union HQ and Conference Centre, and private conference facilities in hotels • Support development of the planned AAICEC international convention centre • Establish a MICE Product Manager desk within ETO followed by a specialised Convention Bureau at a later stage • Create initial MICE marketing collateral in the form of an online directory of meeting venues in a MICE drop down menu on the ETO website • Invest in capacity building and training to ensure professional services, advice and support	• Addis Ababa • Bahir Dar • Bishoftu

Fig. 5.5: Matching Target Market Segments and Tourism Products



6 Execution Programs

The strategic vision and foundations outlined above will be executed through a suitable marketing mix that is anchored in the positioning and brand and speaks to the target markets.

Marketing execution will be in support of the positioning and brand identity and will be conducted through a portfolio of *five key marketing programmes*, namely:

1. **'Encounter The Origin'** overarching destination marketing campaign

   A three-year, multi-channel international and domestic promotional campaign, used as an umbrella call to action and communication theme.

   Key elements: Creative campaign imagery applied to all visuals, website improvements, multi-faceted digital and social media development drive, travel trade education and joint marketing initiatives, media 'stories' initiative, domestic promotion, events support.

2. **'Great Origin Routes'** product packaging and improvement program

   Development and packaging of core touring routes and sub-routes based on the main traditional circuit, complemented by a range of themed sub-circuits and routes to appeal to the various market segments.

   Key elements: Identifying the core circuit and complementary themed routes, auditing routes, mapping routes online and in print, forming route forums with local stakeholders, improving facilities and services on routes.

3. **'Tena Yistilign'** local tourism awareness program

   An internal awareness and capacity building program to prepare and sensitise the tourism industry and communities for welcoming visitors and raising the level of tourism awareness and knowledge.

   Key elements: Service quality awareness and training program, local interpretive guide training program, national tourism awards.

4. **'Ethiopia 'i' Network'** visitor information services improvement program

   A visitor information improvement program to ensure availability of high quality, well-branded and comprehensive visitor information online, in print and at information offices.

   Key elements: Audit and consolidation of existing information print materials, Visitor Centre (VC) classification and improvement program.

5. **'Meet Ethiopia'** MICE development and promotion program

   A programme to optimise the power of Meetings, Incentives, Conventions and Exhibitions, especially given the gateway status of Addis Ababa.

   Key elements: Strengthening convention capacity in ETO, MICE Promotion activities.

These execution thrusts are presented as follows in relation to the brand and target markets outlined in the previous chapter:

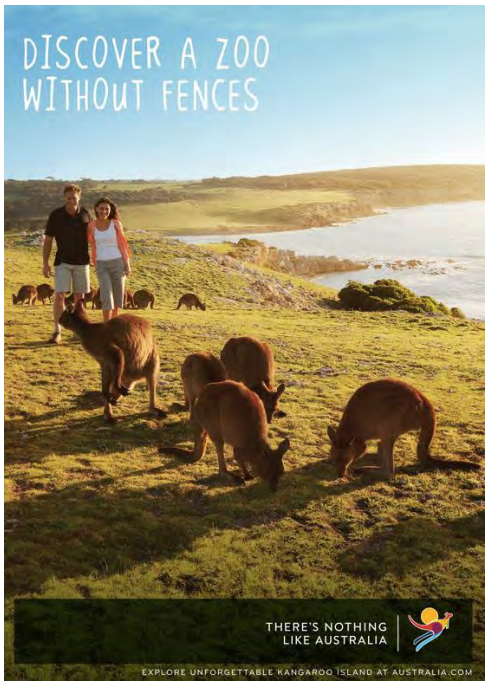
Fig. 6.1: Five Building Blocks for Executing the Strategy



6.1 Encounter the Origin destination marketing campaign

Concept Rolling out 'Land of Origins' brand identity through a multi-year, multi-channel international and domestic promotional campaign called 'Encounter the Origin' and used as an umbrella call to action and as a communication theme for all tourism promotion activities

Case example There's Nothing Like Australia



'There's nothing like Australia' was designed to be long lasting and flexible, something that could be updated as necessary to stay relevant in a highly competitive and fast-changing global tourism environment. In what became one of the country's biggest consumer- generated promotions, Australians responded by uploading nearly 30,000 stories and photos to www.nothinglikeaustralia.com. These stories now sit within an interactive, digital map of Australia. It has so far been used by 180 Tourism Australia partners including airlines, State and Territory Tourism Organisations, and the private industry.

The creative focuses strongly on the digital, social media and advocacy channels that have become so central to holiday planning. In addition to Tourism Board promotions the campaign relies heavily on partnerships with travel trade and media partners and campaign tools include a downloadable campaign logo, library of downloadable still images and video footage, digital screensavers and wallpapers, posters that can be downloaded and printed, e-newsletter template, a campaign content widget that can be inserted on operator websites, digital postcards, etc.

Although Ethiopian tourism is not as mature as Australian tourism and the ETO's budget is significantly smaller, the concept of rallying the industry behind a common message is equally applicable and many 'below the line' promotion activities applied in the Australian campaign are affordable and relevant to Ethiopia.

Elements

1. Campaign creative design and production

The 'Encounter the Origin' campaign should build on 'Land of Origins' brand identity and specific promotional tools should be designed and produced for application by the ETO, Regional Culture and Tourism Bureaus and public and private partners. These could include:

- A campaign logo and 'look and feel' design, in support of the national brand identity, which should be distributed widely to industry partners
- Development of a suitable suite of excellent national and regional destination websites and social media accounts with campaign imagery reflected (*see Addendum C and point 3 below*)
- Campaign branded exhibition stands for major fairs
- Downloadable screensavers and wallpapers
- Campaign stand-alone desktop, floor and window displays for use by trade partners
- A downloadable still image and video library

2. Major online marketing drive

Addendum C contains comprehensive details regarding the proposed online marketing drive, which can be summarised as follows:

a) Phase one: Setting in place appropriate tools for online destination marketing. Currently the design quality, content and functionality of national and regional tourism websites are not up to standard and before engaging in an online marketing drive these need to be improved and established. This will include:

- *Creating excellent national and regional websites* as digital focal points for destination marketing, including email marketing and social media, with synergy of design, SEO optimisation and content between the national and regional websites. Care should be taken to use consistent spelling when translating to English, for optimising SEO. *Addendum C* outlines critical success factors within DMO websites that should be followed in the development of these websites
- *Creating and populating national social media accounts*, for personal sharing and interaction in Ethiopia's key source markets. These would include Facebook, Twitter, YouTube, Instagram and a Blog. It is envisaged that this be outsourced to an external specialist consultancy in the first phase to meet the critical success factors outlined in the *Addendum C*
- *Creating and growing both a trade and consumer digital database* for email marketing with newsletter sign-up functionality on official websites indicating areas of interest. The database should be segmented appropriately so that targeted content can be created for specific traveller interests
- *Engaging in a content drive and partnerships* with influencers, travel rating platforms such as TripAdvisor and digital ambassadors such as travel bloggers to devise brand-appropriate, high quality content for all online platforms and pages in languages of the target source markets. This content can be repurposed for multiple platforms: Create once, reuse often.
- *Building online marketing skills and capacity* in ETO and the Regional Bureaus. KPIs outlined in Addendum C should be introduced and matched to clearly defined roles and responsibilities, with consistent reporting against these objectives
- *Providing Wi-Fi in key tourist areas*, where possible to encourage User-Generated Content. It is recommended in *Addendum C* that free Wi-Fi access be provided in in key tourist areas

b) Phase two: Engagement and Promotion. Once online marketing tools (especially websites and social media platforms) have been established proactive online marketing will be pursued. This will include:

- *Digital marketing campaign 'Encounters'* in support of 'Encounter the Origin' campaign, aimed at creating awareness about, and encouraging travel to Ethiopia's Great Origin Routes, including:
    - a special '*Encounters*' landing page on official websites
    - creating and using the hash tag #EncounterTheOrigin
    - enlisting travel bloggers to experience and blog about The Great Origin Circuit
    - promoting special online travel packages with online fulfilment partners
    - promoting online sharing at key visitor sites, where there is Wi-Fi hotspot access
    - creating an '*Encounters*' Facebook application as a game or competition
    - launching of '*Encounters*' across all relevant social media platforms
    - engaging global influencers to experience '*Encounters*' and share with their networks
- *Leveraging online marketing trade partnerships, including:*
    - an updated and maintained trade database in key source markets
    - a business-to-business (B2B) campaign section on both the national and regional

websites providing a *destination marketing toolkit* that Ethiopia stakeholders, including tourism suppliers, can use to market the destination across their own platforms
    - regular newsletters with updated campaign news
    - joint marketing arrangements encouraging key trade partners to promote 'Encounter the Origin' and share destination content across their digital marketing platforms

- *Developing mobile application technology to promote the destination* incorporating the critical success factors required for a world-class mobile app
- *Domestic digital destination marketing campaign* leveraging the world-renowned ambassadors and national pride of the Ethiopian nation. The campaign outlined in Addendum C suggests leveraging private-sector social media accounts with an engaged Ethiopian audience and the use of the #ExploreEthiopia and #VisitEthiopia hash tags that are already prolifically used

c) Phase Three: Leveraging Affiliates. Engagement with suitable third party partners could become a powerful way of spreading the campaign message. This will include:

- *Creating affiliate partnerships* with travel planning and booking channels like TripAdvisor, WAYN.com and Expedia
- *Commissioning online PR* incorporating Travel Bloggers with strong networks in key source markets
- Join the Destination Marketing Association International and leverage best-practice DMO trends

3. Travel trade promotion

The 'Encounter the Origins' campaign will draw heavily of travel trade relations and a travel trade promotion and sales drive will be undertaken in both 'Core' and 'Investment' markets including:

a) Exhibiting at Trade Fairs

The increasing status and power of the World Wide Web and other communication technologies such as VOIP, email, cellular telephones, video conferencing, etc. has in recent years largely reduced the necessity of face-to-face sales meetings with key trade partners. Many of the smaller operators have also been usurped in recent years by the bigger conglomerates resulting in fewer, but more powerful buyers. Tourism suppliers and destination marketing bodies often leave exhibitions with feelings of frustration at the limited number of serious, new business generated. A focused trade fair strategy is recommended and based on the target market strategy contained in Section 4.3 it is recommended that the following travel trade fairs be supported and attended during the period of the marketing strategy:

- WTM – London (current)
- ITB – Berlin (current)
- Top Resa – Paris (add, France is a leading leisure market)
- COTTM – Beijing (current)
- Special interest consumer exhibitions for specialised tour operators and product owners (see *Addendum E*)

The following guidelines should be applied to exhibition attendance:

- Exhibitions should be an integral part of the 'Encounter the Origin' mix and should not be treated as separate or ad-hoc initiatives. The timing, image and design conceptualisation and communications pertaining to exhibitions should be planned to maximise the promotional value of the integrated promotion campaign
- Adequate background research should be conducted to establish the nature, quality and

potential of trade and consumers attending exhibitions and where possible partnerships could be formed.

- Product 'clubs' could be established for attending special interest exhibitions, with product owners and tour operators joining forces to exhibit and promote such themes on a co-funded basis
- Adequate preparation should precede attendance of fairs. Preparation meetings should be held with Ethiopian exhibitors to ascertain how best the specific fairs can be leveraged and how ETO can assist the private sector in making most of their investment
- Clear, measurable goals (e.g. business procured for Ethiopia, travel trade agreements concluded, media exposure achieved, etc.) should be set for each exhibition and the results should be measured accordingly
- Customer relationship management (CRM) possibilities should be optimally leveraged and adequate details and profiles should be obtained and logged on a database, with proactive communication and feedback following the fairs. Several open-source CRM software platforms are recommended in *Addendum C*, the most suitable being Sugar CRM for its ability to be customised for the specific requirements of ETO

b) Travel trade relations

One of the keys to success for the promotion campaign will be retaining and broadening appropriate trade distribution channels in support of the product development and promotional concepts proposed above. ETO will place a high value on striking up lasting relationships and partnerships with channel operators.

The following are guidelines in this regard:

- *Investment in Joint Marketing Agreements* with tour operator partners in core markets will be actively pursued to promote the 'Encounter the Origins' campaign. Such agreements should be clearly contracted and agreed upfront. For example, a 'heads of agreement' should be drafted, spelling out the contributions of each party and how it is to be invested. The ETO's investment in trade partnerships should preferably entail tactical activities e.g. online marketing drive, advertising, direct mail and email, distribution of flyers of special offers, etc. The impact of these should be closely monitored and measured. Investment in operator brochure pages, brochure advertisements and other initiatives that are essentially the corporate responsibility of trade partners should be avoided

- *Capacity building of inbound Ethiopian operators,* who are in the best position to on-sell travel experiences domestically and to their international partners. Inbound operators will be supplied with campaign marketing collateral and travel trade educationals will be held for inbound sales agents to experience the product first-hand

- *Road shows and workshops*: The aim will be to arrange a series of travel trade workshops in each core market every year. A program of trade road shows and workshops will preferably be arranged before and/or after attending trade fairs to brief the major operators in target markets about the destination and experiences they could sell. Sales and promotion workshops should make a point of displaying and exuding the man brand identity through appropriate decorations, entertainment, music food, etc.

- *Trade familiarisation visits:* As part of the 'Encounters' campaign ETO will work with Ethiopian Airlines to host selected international operators on familiarisation visits to Ethiopia. Consideration should be given to arranging one mega familiarisation trip (travel academy) per year to coincide with a significant event such as the opening of a major hotel or resort complex, convention facility, airport expansion, etc. Such mega event should include well-organised business-to-business workshops and meetings as part of the program, involving a spectrum of Ethiopian suppliers and tour operators

- *'Lucy's Friend' travel agent affiliation program*: ETO will launch an online education program for the international travel trade, with high quality destination information and fact sheets, allowing travel trade partners to complete a knowledge program and a simple test to be registered as a 'Lucy's Friend' and specialist in selling Ethiopia. A good example is the 'Aussie Specialist' program, consisting of 4 online travel trade training modules and a multiple-choice test, for which agents have to score at least 85% (http://www.aussiespecialist.com/About.aspx)

4. Media and public relations drive

Together with online marketing effective media and stakeholder communication should provide ETO with excellent returns on its marketing investment. The following actions will be undertaken:

- *Press kit:* ETO will compile a compendium of media information for distribution to travel media, on a flash drive or preferably on the website or a cloud-based file-storage platform where it can be easily accessed. The kit will include a series of destination articles and fact sheets in support of campaign public relations and communication initiatives

- *Celebrity stories*: Ethiopia has produced many celebrity athletes, models, business people, etc. Their inspirational stories and passion for Ethiopia need to be told and ETO will launch a vibrant destination blog to carry the stories of high profile Ethiopians and their views on Ethiopia as a tourism destination. From here it will be shared with traditional and social media platforms

- *Media releases:* ETO will issues at least two international and local media releases per month in support of the 'Encounter the Origin' campaign to establish and maintain media awareness of tourism related developments and events in Ethiopia. The following guidelines pertain:
    - ETO will compile and build up an appropriate database of media contacts that will include print, radio, TV, online and social media contacts
    - Specialist PR capacity will be created in ETO to establish personal relations with travel journalists and to maintain continuity with information being distributed consistently to the same media person
    - Communication topics should ideally focus on newsworthy events and developments that support the brand of 'Land of Origins'
    - Corporate/organisational releases could be issued regarding ETO's progress and campaign successes
    - Consideration should be given to outsourcing parts or all of the press liaison work to external specialists

- *Travel press trips and editorial coverage:* A major emphasis will be placed on inviting and hosting high quality travel media to explore and report on their travel encounters with Ethiopia. Media will be hosted in collaboration with the private trade and regional offices and itineraries will be

designed to suit their interests. International media representatives should be drawn from the core target markets, especially when celebrating special events. ETO will establish a specialised guest programmes unit to organise press trips and deal with travel media requirements

- *Tracking and measuring media value:* A key element of the media program will be to monitor media coverage following media interactions and to measure the results of such coverage in key target markets, to understand the ROI and act accordingly. Professional media monitoring services will be appointed on an annual contract in this regard. Following any press trip, media coverage emanating from the trip will be tracked in association with the journalists hosted and through media scanning and the monetary value of column centimetres of print coverage, blog value and/or airtime received will be compared to the cost of hosting the journalist

5. Domestic tourism drive

All indications are that, while awareness among Ethiopian of tourism opportunities, responsibilities and potential is still low there is a rapid rise in disposal income among the middle classes, which will translate in an increased ability to travel. There is a also a significant resident expatriate population in Ethiopia who are keen to travel the country. Domestic tourism is an important backbone of most national tourism industries and is less affected by international market fluctuations. Travel knowledge of the country also instils a sense of national brand pride. For tourism to become a sustainable, integral part of the economy and to be recognised as a potential entrepreneurial of career opportunity, the levels of awareness and participation in tourism should be increased.

An overarching domestic tourism campaign in support of the 'Encounter the Origin' theme will be launched to stimulate travel among Ethiopians and foreign permanent residents. The name of the campaign should resonate with Ethiopians and will be decided through consultation and possibly a competition. A successful example of such campaign in a developing economy is the 'Sho't Left' domestic campaign in South Africa (www.shotleft.co.za).

The tactical actions of the Ethiopian domestic tourism campaign will be planned in consultation with the industry but could include the following aspects:

- Promotions could be focused on certain months of the year, e.g. the 'shoulder' seasonal months of May and September and launched at least six months in advance of the actual travel periods
- ETO will collaborate with Ethiopian Airlines, local accommodation operators, travel agencies, transport providers and others in coming up with affordable travel opportunities and offers for groups, families, etc.
- ETO in collaboration with the Ethiopian Broadcasting Corporation and other domestic media will launch a local public relations, editorial and advertising campaign to promote domestic travel opportunities (possibly in the form of a treasure hunt with good prizes) and to raise interest of the unique attractions of the country
- The Regional Culture and Tourism Bureaus will be provided the opportunity of partnering ETO and/or launching their own sub-campaigns and/or marketing actions in support of the national campaign
- A "take-a-friend" campaign will be considered where locals are encouraged to travel their country but also to take along a friend or relative from abroad

ETO will consider outsourcing certain key aspects of the domestic campaign, playing the role of campaign leader, coordinator and manager.

6. Tourism events initiative

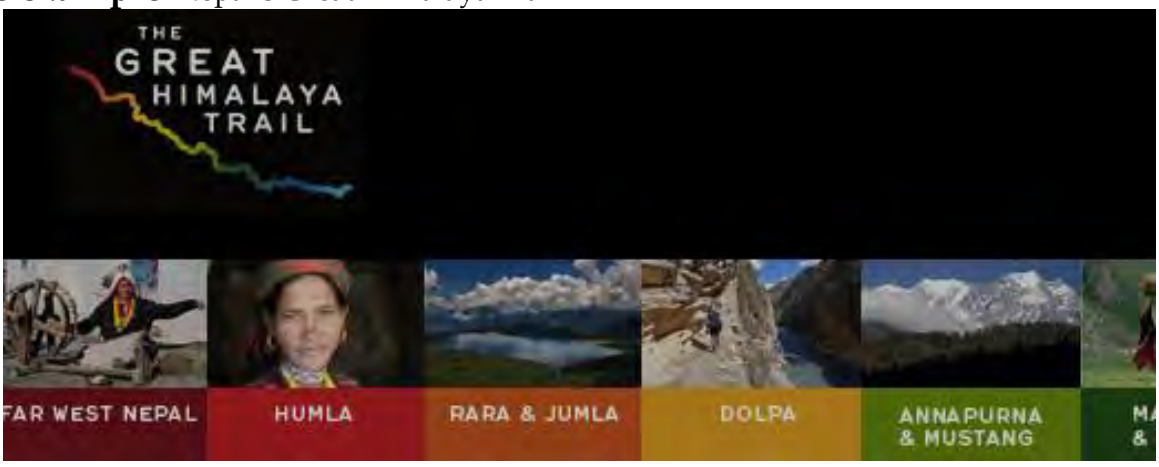
Ethiopia's traditional events are already major draw cards and visitor numbers soar during Timket, Meskel and other events. While these events will remain important, they are largely self-sufficient and their challenges are of a management rather than a marketing nature. Many other facets of Ethiopia's cultural and sport tourism product though, can benefit hugely from events to raise the demand and awareness of such opportunities. The following initiatives will be taken in this regard:

- *Calendar of events:* ETO will produce and update, in collaboration with the regional and local bureaus a calendar of all events taking place throughout the year. This calendar will be part of the Ethiopia Tourism website (see 6.1 above) and will be communicated through media releases, the destination blog, social media and other promotional channels
- *Events support program*: ETO will provide event organisers of new, innovative events that complement the strategy with in-kind support, such as endorsement for sponsorships, permission to use the destination branding, public relations and media coverage and advice regarding local conditions that may affect the event. In time to come ETO may be in a position to provide brand-friendly events a 'flagship' status and some financial assistance. Priority will be given to events that have the potential to grow as flagship events with national and international status and that:
    - Leverage Ethiopia's special interest possibilities such as extreme running, hiking, mountain biking, triathlon, etc.
    - Promote Ethiopia's music and arts, both traditional and contemporary musical events and performances

6.2 Great Origin Routes

Concept Development and packaging of core ('spine') touring routes based on the main tourist sites of the northern and southern circuits, complemented by a range of regional themed sub-circuits and routes that branch off the main circuit and that appeal to the various market segments.

Case example Nepal's Great Himalaya Trail



The Great Himalaya Trail is a network of existing treks and trails, which together form one of the longest and highest trails in the world. Nepal's GHT has 10 sections comprising a network of routes (see www.thegreathimalayatrail.org), each offering something different, be it adventure and exploration, authentic cultural experiences, or simply spectacular Himalayan nature.

Elements

1. Conceptualising routes

The Great Origin Routes identification and mapping will be conducted in partnership with the Regional Bureaus. The core of the Great Origin Routes will be around the traditional Northern and Southern circuits, including the main historical, cultural and environmental sites.

The *following routes will be prioritised* at national level, during the fist stage of routes development:

Route 1 - Addis Ababa and surrounds: Gateway to African Diplomacy

- Museums
    - Addis Ababa Museum
    - IES Ethnographic Museum
    - National Museum
    - Red Terror Martyrs' Memorial Museum
- Gullele Botanical Gardens
- Historic churches and Mosques
    - St George's Cathedral
    - Beata Maryam
    - Selassie Cathedral
    - Annuar Grand Mosque
- Markets and Shopping
- Cultural Restaurants and specialty restaurants
- Entoto Hills
    - Tiya, Adadi Maryam & Melka Kunture
- Debre Libanos Monastery
- Bishoftu
- Born Free Sanctuary and Menegasha Forest

Route 2 - The Northern Route: Mountains and Empires

- Bahir Dar, Lake Tana and monasteries
- Blue Nile Falls and Blue Nile Gorge
- Gondar
- Simien Mountains National Park
- Axum
- Yeha temple
- Debre Damo Monastery
- Gheralta and the rock-hewn churches of Tigrai
- Mekele
- Lalibela
- Includes rock hewn churches, Asheten Mariam, Yimrihane Kristos cave church

- Bati and Senbete Markets
- Guassa Community Conservation Area and Ankober
- Include Al Nejashi and en route Adwa and the landscape from Debark to Axum

Route 3 – The Southern Route: Rift Valley Cultural Mosaic

- Central Rift Valley
  - Ziway
  - Langano
- Abijatta-Shalla National Park
- Hawassa
  - Incorporate Shashemene (mention Rasta community), Lephis Forest, Wondo Genet & Senkele Sanctuary
- Arba Minch/Nech Sar NP and its environs
  - Dorze
  - Konso
- South Omo Ethinic Groups
  - Including 16 ethinic groups in Dabub (South) Omo Zone with diverse culture.
  - Include Omo, Mayo and Maze National Parks
- Dilla
- Yabelo National Park and its environs
- Yabelo Wildlife Sanctuary (for birding)
  - including Garalle NP, the Gada system in Borena and Guji zones

Route 4 – The Eastern Route: Walled City

- Awash National Park
  - Including Bilen & Alledeghi & Yangudi Rassa
  - Lower Awash Valley WHS – reference origins of humanity and Lucy
- Danakil Depression
  - Erta Ale and Dallol and salt lake
- Dire Dawa
- Harar
- Babile Elephant Sanctuary
- Jigjiga
- Bale Mountain National Park
  - Dodola Forest Hikes and Sanette Plateau
- Southeast Birding Route
- Sof Oman and Shiek Dire Hussein

Route 5 – The Western Route: Coffee and Forests

- Ambo/ Mt Wenchi Crater Lake
- Asosa / Benishangul-Gumuz
- Jimma
- Chebera-Churchura National Park
- Bonga/ Kaffa (birthplace of coffee)
  - New coffee museum (not open)
  - Yayu, Shieka and Kaffa Unesco registerered biosphere reserves

- Tepi
- Southwest Omo, Surma territory, west of Omo River
- Metu/ Sor Waterfall
- Gambella (town)
- Gambella National Park and Dedesa wildlife reserve know for hippos

It is envisaged that each region will eventually identify a number of sub-circuits to contribute to these main Great Ethiopian Routes[12]. The sub-circuits can be general touring routes or could appeal to specific interest groups. Importantly, sub-routes should not be constrained by regional boundaries and regional stakeholders will collaborate when routes cross regional boundaries.

2. Route forums and auditing

Route forums will be set up for each of the identified routes to coordinate activities of various role players involved in the development and promotion of the various routes. The forums will be led by ETO staff and will be comprised of the relevant regional Bureaus (as main champions), selected community representatives and interested and affected private stakeholders. Each route should have a 'route champion' who will chair the route forum and be the main liaison channel with the Bureau. An inventory will be made of attractions, experiences, facilities and services on each route and these will be evaluated in terms of facilities quality, safety, human resources capacity, etc.

A plan of action will be drafted for enhancement of experiences and facilities on the various routes.

3. Route mapping and promotion

The routes will be mapped on the destination website using intercative mapping functionality (e.g. www.namibiatourism.com; www.openafrica.org) and possibly on a printed Great Origin Routes Map, highlighting the experiences, facilities, services and activities available on each route. Printed routes maps will also be downloadable from the ETO website.

The routes will be promoted through the 'Encounter the Origin' promotional campaign, including through travel trade and media famliarisation visits and on the various websites.

4. Site and facilities improvement

The route audits will highlight specific site improvements and developments to be given priority, including:

- "Hardware" improvements: physical works to improve tourism areas and experiences, such as access routes, parking, trails (for pedestrians, bikes and horses), improved tourism offices, observation platforms, safety railings, rest and shade areas, etc., signposting, etc.
- "Software" improvements: put in place organisation, services, interpretive signage, etc. that can change a place into a package of experiences. This often needs engagement and stakeholder collaboration rather than capital investment, however the positive impacts can be significant
- Maximising market ready products: packaging/branding products so that a value can be attached to them and they can be commercialised

[12] See regional marketing strategies for regional routes

6.3 Tena Yistilign Ethiopia service quality drive

Concept An internal tourism awareness drive to raise awareness of the value and importance of good service in the tourism

Case example South Africa's Welcome Campaign



Welcome is a South African Tourism initiative that aims to create and sustain engagement with industry stakeholders, and encourage them to strive for service excellence and extend to guests the warmest welcome (see www.welcome.southafrica.net). The initiative extends a hand to all role-players in the tourism industry, from seasoned tourism business owners to young, thriving start-ups.

In addition to hosting industry workshops the initiative provides tourism operators with various tools to assist businesses in improving service levels and making sure that guests have the best possible experience in South Africa, and at the establishment level. This will ensure they have a special, meaningful experience. They will then want to return, and recommend the business (and South Africa) to their friends.

Elements

1. Tena Yistilign Service quality training program

A short frontline service-training program aimed at conveying basic principles of customer care to public and private sector tourism service providers. It will be aimed at key frontline personnel in tourism and related industries – e.g. emigration, accommodation, restaurants, tourism-related retail and entertainment, tour operators/guides, etc. Given the fact that Ethiopia is primarily a touring destination and that 'Land of Origins' brand relies heavily on guide communication and interpretation, a special focus will be put of improving the quality of local tour guiding skills.

The program will be operated in partnership with private and public tourism stakeholders and in designing it the ETO will draw on similar programmes elsewhere (UK, New Zealand, Canada, South Africa, etc.) to ensure its feasibility. Memoranda of Understanding (tourism MOUs) with successful tourism countries should be leveraged to gain insights about best practices in this regard.

2. Tena Yistilign guide and language training academy

A training program for local guides and frontline service staff to ensure they have the knowledge and capabilities to 'tell the Ethiopian story'. Foreign language ability will be given priority and language training will be provided in association with foreign governments through organisations like Alliance Française, Goethe Cultural Institute, Italian Cultural Institute, etc. Language phrase books and mobile phone applications will be provided to guides and frontline staff.

In addition existing tourist guides will be trained in communication skills, storytelling and Ethiopian knowledge to be able to convey the facts, legends and 'spirit of originality' with inspiration and creativity.

3. Tena Yistilign Ethiopia Annual Tourism Awards

The main purpose of The National Tourism Awards is to reward service excellence and adherence to the call for tourism innovation and involvement. Entries will be through proposals and nominations and an independent panel will be appointed to evaluate proposals. To start off a limited number of categories will be introduced in support of the strategy thrusts, e.g. best frontline service persons in hospitality, emigration and commerce; best community-based tourism enterprise; tourism entrepreneur of the year; local tourism town of the year, etc. A celebrity awards 'patron' should be appointed and winners will be announced at a high-level awards event.

A good example of such awards scheme is South Africa's Lilizela Awards (http://www.lilizela.co.za/)

6.4 Ethiopia Tourism Information Network

Concept A network and portfolio of tourism information offices and materials that display the brand and operate at a high-quality level

Case example New Zealand's i-Site Initiative

i-SITE is New Zealand's official visitor information network with over 80 i-SITEs nationwide (see www.newzealand.com/int/visitor-information-centre). i-SITE knows all the best things to do, places to stay and ways to get there. Plus they'll take care of the bookings. Every person who works at i-SITE is a travel expert for their own hometown, so they can help visitors find the sort of activities, attractions, accommodation and transport that only a local would know. I-Sites provide itinerary planning and information, accommodation, transport, activities, attractions bookings nationwide; Free maps, weather & mountain safety information and local information - events, attractions, restaurants

Elements

1. Portfolio of high quality marketing and information materials

The situation analysis found that Ethiopia's national, regional and local tourism offices produce a variety of printed information materials. The factual content of such materials is often good, however the target audiences and aims of the materials are not always clear and the portfolio is largely fragmented and visuals are poorly executed. The growing importance of the Internet and websites is fast making marketing collateral redundant and ETO will in future mainly invest in digital marketing and information platforms *(see online marketing strategy)*.

However print information will remain relevant for the foreseeable future. Funded by the 'production of marketing materials project' of the ESTDP[13], ETO and the regions will produce the printed and electronic promotion and information materials outlined below.

Type of materials	Description
National Materials (to be produced by ETO)	
Scheduled for production under the ESTDP project:	
Inspirational Flyer A4 folded leaflet; 100,000 units in 4 languages	'Teaser' flyer for mass distribution at promotional events, containing key reasons for visiting Ethiopia and eye-catching photographs
Inspirational brochure 32-page brochure; 60,000 units in 4 languages	A high quality, concise but glossy inspirational folder as motivational piece to create awareness, curiosity and interest in traveling to Ethiopia. It will have spectacular visuals to solicit interest in the destination during first contact discussions and display the brand in a creatively
Informative folders by tourism routes Folded leaflets for 5 routes; 15,000 units per route, 75,000 in total, in English only	Folders for Addis Ababa and surrounds, Northern Route, Eastern Route, Southern Route and South-Western Route to provide interested travellers with guiding information regarding key tourists sites: their locations, attractions, experiences, contact numbers for arranging and booking visits to such places
Informative folders by World Heritage Sites Folded leaflets for 9 sites; 1,000 units per site, 90,000 in total, in English only	Folders for Ethiopia's nine World Heritage Sites to provide interested travellers with guiding information regarding key tourists sites: their locations, attractions, experiences, contact numbers for arranging and booking visits to such places
Posters 12 Colourful Posters; 2,000 copies of each poster, 24,000 in total	Posters reflecting the World Heritage Sites and also Ertale Volcano, Danikel Depression and a major festival.
Image bank 300 high-quality photos	Collection of high quality images covering the key destinations, attractions and themes, including regions, routes, world heritage sites, main towns, national parks, food, crafts and facilities and services
Inspirational short videos Six Short videos of 3 minutes each and one 5-minute main video	Promotional videos covering key experiences offered in Ethiopia, by main themes and also covering the key travel destinations

[13] The nature and extent of marketing materials outlined below was scoped and tendered out before the formulation of this marketing strategy

Recommended	
Ethiopia: Traveller Companion	A guide book with factual information on attractions, facilities, activities and experiences and that covers the key regions, routes, sites and provides information on facilities and services. Could be produced with a commercial partner and funded through advertising revenues
Ethiopia: Travel map	A comprehensive fold-out map that indicates key locations, attractions and distances with tourist information on the flip side of the map
Regional materials (To be produced by Regional Culture and Tourism Bureaus with technical advice by ETO)	
Regional travel guide	Concise guide with factual information on key attractions, activities routes etc. and indicating practical travel information such as locations, entrance times and cost, guide availability and costs, places to stay and eat, etc. Photography should be limited but of a high quality.
Regional travel map	Each region should produce a fold-out travel map that highlights clearly travel routings, driving times and distances, key attractions and provides information on unique features in the region and smaller maps of key city centres
Local materials (To be produced by District and City Tourism Offices, with technical advice by ETO)	
Local city maps	A fold-out map that shows the city layout and includes information on key local sites, events, activities etc. as well as practical guidelines on local traditions, cultures, etc.

A distinction should be made between 'promotional' and 'informative' materials, the former being produced for enticing customers to Ethiopia who have not yet decided to visit the destination, while the latter is for handing out to visitors who have already decided to travel or are already in Ethiopia and need the materials for planning their trip.

An important prerequisite is that all printed marketing materials should clearly complement the regional brand identities in design and identity. In this respect ETO, as brand custodian, will work closely with the Regional Bureaus to evaluate current marketing materials, redesign and/or phase them out as necessary

2. Network of branded Visitor Information Centres

All Visitor Information Centres (VICs) in the country will carry a standardised national 'i' sign in support of the national branding. The i-Network branding and 'i' sign will be developed and monitored by ETO and the Regional Bureaus will apply the branding in their regions. VICs will be classified at three levels (See detailed classification guidelines in *Addendum G*), namely:

Type of VIC	Description
Gateway Centre Addis Ababa	The VIC in Addis Ababa as key entry point will provide information about the entire country and will carry all regional and local tourism brochures. It will become a one-stop information service and will include foreign exchange services, merchandising of Ethiopia-branded items, a small coffee shop etc. It should become a congregation point for visitors to the city and a meeting point for tour departures, etc.
Regional centre Regional Tourism entry hubs	VICs in the major regional centres that provide information about the broad region, which it serves. Multi-functional hub for information, guide bookings, transport, etc.
Local Centre Town and community level	VICs at town or community level that provide information about the local area. Local information and guide booking services provided.

The i-Network implementation program will include:

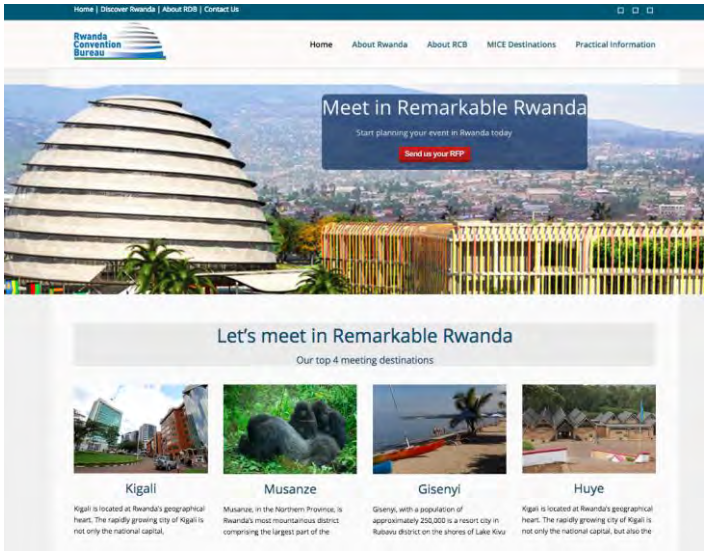
- Development of a set of standards for the various types of VICs and production of an Operating Manual for VICs explaining standards, roles, services, management processes and procedures, etc. This could be made available online through the industry section of the website or printed in handbook form.
- Audit of staff capacity, knowledge and language and a training improvement program
- A phased refurbishment program, modernising VICs with furnishings and technology to ensure they have the hardware, software and information databases to fulfil their functions

6.5 Meet Ethiopia

Concept A national initiative to promote Ethiopia and in particular Addis as destination for Meetings, Incentives, Conventions and Exhibitions (MICE) starting with a Convention desk and developing into a national Convention Bureau

Case example Recently established Rwanda Convention Bureau

Rwanda Convention Bureau (RCB) is a strategic business unit of Rwanda Development Board's Tourism and Conservation Department.
Established in 2014 RCB promotes Rwanda as a premier destination and is a one-stop solution for assistance, information and neutral advice on hosting and organising MICE / business events in Rwanda.



Whether an international convention, association meeting, conference, incentive

trip, or exhibition the RCB is there to assist conference organisers and associations with every step of planning for the event. Rwanda Convention Bureau is Africa's latest International Congress and Convention Association (ICCA) Member (see www.rwandaconventionbureau.rw)

Elements

A more comprehensive strategy for MICE promotion is attached as ***Addendum D***. Two components will be implemented during the period of the strategy, namely:

1. Convention Desk

In the immediate short-term a dedicated MICE Product Manager desk within ETO will be initiated with the objective of working towards the establishment of a more professionally driven international best-practice National Convention Bureau.

To start with the Product Manager will facilitate the commissioning of a feasibility study and an audit of the destination to determine the future structure of the Convention Bureau. At the same time the Product Manager can focus on the development of the regional meetings and assist with a formalised marketing campaign in order to support efforts currently spearheaded by the United Nations Conference Centre as well as the African Union HQ and Conference Centre.

The National Convention Bureau, once established, will develop a stand-alone strategic MICE business plan for Ethiopia. Key performance areas for the MICE Product Manager desk in years 1 and 2 are outlined under MICE promotion below.

2. MICE promotion

A business tourism brand for Ethiopia will be crafted once the destination brand is concretised, and this will be followed by the development of a comprehensive sales and marketing strategy.

The promotion strategy will be implemented in two phases, namely:

Phase 1:

Years 1 and 2

- Feasibility study and destination audit of suitable venues, accommodation and services inventory
- MICE brand / logo origination
- Communication development (website, printed collateral, PR)
- Engage with industry stakeholders to identify suitable operators and organisers to handle meetings, conferences and incentive trips
- Arrange familiarisation trips to potential meeting and incentive buyers
- Develop a marketing strategy for meetings, conferences and incentive sales and packaging of incentive and pre/post tour itineraries to take to market
- Initiate MICE market delegate research to better understand the sector and how to take advantage of the opportunities presented
- Support the first MICE East Africa Trade Show to be hosted in Addis Ababa in early 2016. This is a first for East Africa, organised by a private sector company and will be endorsed and supported by ETO with marketing, publicity, hosting of meeting buyers and attendance at the show
- Attendance at trade shows along with the United Nations (Economic Commission for Africa) Conference Centre and African Union HQ and Conference Centre, for example e.g.

  Meetings Africa, Johannesburg – annually in February

IMEX[14], Frankfurt – annually in May

IBTM[15] World, Barcelona – annually in November

Phase 2:

Years 3 to 5

- Join appropriate international industry associations (e.g. ICCA[16] and SITE[17])
- Focused effort on consolidation of a coordinated MICE industry sector
- Professional development via mentoring and/or training of staff
- Concretise a bidding strategy along with bid book and supporting collateral
- Develop Convention Bureau management tools (e.g. measuring the positive return-on-investment of hosting a meeting)
- Product packaging for meetings, conferences and exhibitions
- Develop an event strategy for the destination
- Develop a database strategy
- Attend trade shows
- Host site inspection / familiarisation trips for qualified meeting buyers

It should be noted that international best practice determines that a new convention centre (such as the planned AAICEC) should be taken to market a minimum of two to three years prior to opening.

7 Implementation

The vision, objectives and execution programs are ambitious and require a sensible and practical implementation approach. Four approaches will be followed during the next five years, namely:

- A staged approach to implementation
- Strengthening ETO and regional institutional marketing capacity
- A strong destination marketing partnership
- Securing adequate funding
- Effective monitoring and evaluation

7.1 A staged approach to implementation

This medium-term strategy aims to establish a sound market dynamic and to maximise Ethiopia's tourism revenues with a specific focus on the next five years. This should lay the basis and create a sustainable momentum for reaching the vision and growth objectives by 2025.

The tourism marketing strategy will be implemented over three phases, namely:

- Consolidation - laying sound marketing foundations (Years 1 and 2)
- Escalation - stepping up marketing implementation and market growth (Years 3-5)
- Expansion - achieving consistent high tourism growth (Year 6 and beyond)

Figure 7.1 below indicates the actions that will receive priority during the various stages of implementation.

Fig. 7.1: Conceptual Diagram of a Staged Marketing Approach

[14] IMEX – The worldwide exhibition for incentive travel, meetings and events
[15] IBTM World – International business tourism market
[16] International Congress and Conference Association
[17] Society for International Travel Executives



7.2 Institutional strengthening

The currently limited capacity and marketing skills at ETO and the Regional Tourism Bureaus present significant challenges for implementing the strategy. While it is not the mandate of this marketing strategy to evaluate and design the organisational structure of ETO and the Regional Tourism Bureaus, implementing the strategy will require excellent knowledge and specialisation in the following areas:

- Brand management and execution
- Digital marketing, especially in areas such as search engine optimisation, web design and branding, content production and management, maximising social media platforms, blogging, etc.
- Promoting MICE tourism
- Establishing and leveraging travel trade relations with foreign and local tour operators
- Leveraging travel media and public relations
- Project management and innovative product packaging

The following aspects should be considered in addressing these capacity challenges:

- *Appropriate structuring of ETO:* ETO organisational structure, functional divisions and job descriptions will be structured in accordance with the strategy execution programmes. The following institutional roles and key performance areas will be addressed:

Key Performance Areas (KPAs)	Tasks	Institutional implications
Strategic leadership		
The strategic leadership functions will resort under the ***Office of the CEO***, the strategic leader of the		

Key Performance Areas (KPAs)	Tasks	Institutional implications
organisation. The following key performance areas, tasks and institutional units will resort under this function:		
Strategy development, coordination and performance monitoring	• Formulating and regularly adapting the ETO marketing strategy based on market intelligence • Ensuring synergy in executing strategy projects among ETO units (especially between promotion and product development) • Monitoring strategy execution, progress and impacts on a regular basis, based on suitable indicators	***The CEO will spearhead this function*** Advisable to contract specialists for some elements of strategic advice
Marketing financing and fund raising	• Engaging the MoCT in understanding the strategy requirements, action plans and performance measures and motivating for adequate funds • Researching and proposing suitable funding models • Identifying suitable co-funding opportunities and negotiating funding partnership • Identifying, investigating and executing income generating opportunities	***A 'Stakeholder relations and partnerships' unit*** will be created to leverage public and private cooperative and financial partnerships with national, regional and private sector partners A senior communicator, who is an experienced fundraiser and relationship manager should be appointed to head this function, with remuneration and rewards based on agreed financial and operational performance indicators Limited support staff could be considered, complemented by external assistance
Regional communication, coordination and partnerships	• Ensuring that regional Culture and Tourism Bureaus are well informed of ETO's programmes and projects, and visa versa • Negotiating agreements with regional Culture and Tourism Bureaus regarding their participation in and support for ETO's programmes and projects • Monitoring regional participation in ETO's programmes • Conducting regular communication and coordination with Regional Culture and Tourism Bureaus	
Corporate communications	• Communicating ETO's initiatives, achievements and progress to key stakeholders, funders, etc. • Monitoring stakeholder perceptions and awareness of ETO's programmes	
Public-private stakeholder relations and partnerships	• Formalising agreements/memoranda of understanding (MOUs) with key public and private partners regarding joint marketing programs, projects and sponsorships • Conducting joint planning and execution of marketing programmes with partners	
Marketing A key ***division of Tourism Marketing'*** will be created to deal with all promotion matters at an overarching level. A senior, experienced marketer will head this function; if this is not a tourism expert advisory expertise will be contracted to advise on tourism marketing matters. The following units will resort under this function:		
Brand management and execution	• Acting as the custodian and brand manager of 'Ethiopia: Land of Origins' brand • Raising awareness and communicating the destination brand promise, essence, identity and rules to all interested and affected parties	The Brand Management and Market Intelligence functions will be ***managed and***

Key Performance Areas (KPAs)	Tasks	Institutional implications
	• Developing the ETO corporate brand identity to be in synergy with the destination brand • Spearheading application and roll-out of the destination brand within all elements of ETO • Advocating brand application by partners at national and regional level • Monitoring brand application and brand awareness and adapt ETO's approach accordingly	***executed by the head of the Marketing Division.*** Various tasks, such as market intelligence management, could be outsourced under contract, managed by ETO marketing manager
Market intelligence management	• Conducting market research into target source markets and segments to ensure focused promotion and achieve the best possible Return on Investment (ROI) • Ensure that all partners are aware of key market trends and profiles and incorporate these in their marketing programmes	
International leisure promotion	• Directing and executing the 'Encounter the Origin' campaign • Formulating annual international promotion plan • Liaising with and directing market-based representatives and foreign diplomatic missions • Promoting Ethiopia to the international travel trade • Promoting Ethiopia to the international travel media • Initiating and arranging special promotions in key markets and work with the online marketing specialists and other colleagues in executing these	***A leisure tourism promotion unit*** will be established, and a small core of operational staff at head office will be responsible for directing promotion in key regional markets e.g.: Northern Europe Western Europe Americas Asia and rest of the world Domestic Contracted professional Market-based Representatives (MBRs) will direct promotion in key international markets
Domestic leisure promotion	• Directing and executing the domestic marketing campaign in support of 'Encounter the Origin' theme • Engaging the domestic media (e.g. the broadcasting corporation and other key media) in promoting the campaign • Engaging the domestic travel trade (including Ethiopian Airlines, accommodation providers, etc.) in coming up with special offers and price packages • Engaging the Regional Culture and Tourism Bureaus in extending the campaign through regional involvement	
MICE promotion	• Establishing a MICE desk, followed later by a Convention Bureau, at ETO • Developing MICE destination promotion collateral • Establishing a MICE supplier database and arranging marketing partnerships with Ethiopian convention facilities, accommodation providers, etc. • Promoting Ethiopia as a MICE destination to international MICE trade	A small, dedicated ***MICE promotion unit*** will be established. Key tasks will be outsourced
Online promotion	• Developing the official destination website and populating	A dedicated ***E-marketing unit*** will be

Key Performance Areas (KPAs)	Tasks	Institutional implications
	with suitable content in support of the strategy • Maintaining and innovating website content on an on-going basis • Setting up and populating social media accounts • Engaging with social media to attract a suitable Ethiopia following and leveraging earned media as best possible • Engaging Ethiopia fans, bloggers, etc. in covering Ethiopia on social media • Formulating and publishing a regular destination blog and e-newsletter • Devising, launching and managing 'Encounters' online promotion campaign • Conducting tactical online marketing initiatives upon request of international and domestic marketing campaign managers • Engaging regional Culture and Tourism Bureaus to ensure high quality regional websites and online information • Monitoring website and online marketing performance	created to spearhead online promotion A specialist in digital promotion should be appointed to head this function, which will be a priority focus area in ETO Hosting of the website, content creation and management, online campaigns and social media management could be outsourced

Product and human resources development

A ke***y division of Tourism Development*** will be created to deal with all product and human resource development matters at an overarching level. A senior, experienced tourism development expert will head this function. The following key performance areas, tasks and institutional units will resort under this function:

Visitor information management	• Researching and developing an inventory of destination attractions, facilities and services in consultation with regional Culture and Tourism Bureaus, • Ensuring effective publication and distribution of visitor information through online and offline media • Leading and managing the production and distribution of printed visitor information materials • Developing and implementing the Ethiopia i-Network VIC accreditation system • Monitoring performance and distribution of visitor information	A small ***Visitor Information unit*** will manage visitor information materials, Gateway VICs and accreditation of VICs in collaboration with regions ***Attractions packaging and improvement*** to develop the Great Origin Routes, work with regional Culture and Tourism Bureaus to audit sites, conduct development feasibility studies and develop visitor ***Tourism human resources development*** to
Route development and attractions packaging and improvement *(In close collaboration with regional Culture and Tourism Bureaus*)	• Identifying, plotting and planning Great Origin Routes • Establishing stakeholder Route Forums • Identifying attractions and sites on routes and establishing an inventory of visitor attractions and experiences per route • Mapping routes and attractions on paper and on the website • Auditing the quality and suitability of key sites and experiences on routes and identify gaps • Launching and managing a route improvement programme for the various routes (sites, experiences, etc.) • Promoting routes in partnership with colleagues in the	

Key Performance Areas (KPAs)	Tasks	Institutional implications
	Promotion Department	manage the Tena Yistilign including Marketing training, frontline and language training and launching the Ethiopia Tourism Awards
Marketing training and capacity building	• Conducting a training needs analysis among national and regional tourism professionals and identifying suitable training topics and models required • Procuring suitable marketing training, especially practical marketing opportunities where staff work under mentorship of local and foreign experts • Monitoring effectiveness of marketing staff	
Front-line and guide service training and community awareness	• Developing, launching and managing the Tena Yistilign capacity building programme • Securing opportunities for foreign language training of guides and frontline personnel from foreign embassies and organisations • Developing and managing the Ethiopia Tourism Awards	

- *Improved conditions of employment:* The situation analysis has indicated that the ETO is at a major disadvantage in terms of remuneration levels compared to other similar tourism boards. Urgent improvements are required in conditions of service to attract the best possible expertise and manpower for implementing the strategy, followed by a suitable recruitment drive
- *Outsourcing:* ETO will assess and outsource certain specialist promotion components such as digital marketing, MICE marketing, route and product development, etc.
- *Market-based representation:* ETO will appoint contracted, specialist market-based representation companies in key markets like the UK, Germany and possibly the USA
- *Engaging foreign embassies and missions:* In markets where ETO does not have representation diplomatic staff based in the particular markets will be trained in tourism promotion and provided with information and marketing materials
- *Training and capacity building:* A concerted capacity building program will be launched to improve knowledge and skills, especially in the areas of execution mentioned above. All training should be focused on specific skills related to the job requirements of participants and while some theoretical exposure will be required training should be mainly conducted through practical implementation and learning by doing. Trainees should be required to complete specific practical tasks as part of training courses.
- *Building regional capacity*: Since the Regional Tourism Bureaus are key parties in implementing the strategy they will equally invest in capacity building and strengthening. ETO should provide technical assistance to the regional tourism bureaus and facilitate the exchange of experiences among regions, private operators and tourism authorities of other countries and regions.

7.3 Strong and functional partnerships

The strategy will only succeed if it is conducted in close partnership with the private sector and regional Culture and Tourism Bureaus. The following mechanisms will be pursued in the interest of strengthening the partnership between ETO, the private sector and the regional bureaus:

1. Team Ethiopia

'Team Ethiopia' will be a formalised marketing partnership initiative between ETO, private sector organisations, Ethiopian Airlines and the regional Culture and Tourism Bureaus, based on the following agreements:

- Commitment to carrying and promoting the Ethiopia tourism brand wherever possible
- Commitment to actively participate in and support the execution of tourism marketing strategy through financial and/or in-kind support

'Team Ethiopia' will meet on a regular basis (at least twice per annum) to consider and give input to the ETO's marketing plans and activities and endorse ETO's marketing plans through active participation and allocation of human and financial resources.

2. ***An active Tourism Marketing Committee and workgroups***

ETO's marketing plans and activities will be planned and executed in consultation with a marketing committee of knowledgeable tourism industry specialists, recruited from the local tour operator associations, hotel and airline sectors as well as from the main regional Culture and Tourism Bureaus. The Marketing Committee will appoint project-specific workgroups to focus on specific projects and/or campaigns as required. The roles of the committee and project workgroups will be to:

- Participate in the formulation of ETO's marketing plans and advise on the content and execution of the plan
- Assist ETO in making the best possible decisions and choices in applying its limited marketing resources

3. ***Clear roles and responsibilities***

The ETO and Regional Tourism Bureaus will work together closely in executing the national marketing strategy and in ensuring that the regional marketing strategies are in synergy with the national strategy. The following role definitions will be followed:

Marketing Function	ETO Role	Regional Bureau Role
Brand Management	• Being the brand custodian for the Ethiopia Tourism Brand and laying down and managing the brand architecture and disciplines within which regions will conduct regional activities • Take the lead in executing the brand nationally • Monitor brand application within the framework of brand disciplines	• Appoint a regional brand champion to work with ETO in executing the agreed 'Land of Origins' brand strategy in their respective regions, following the agreed regional brand positioning and disciplines, e.g. in design of printed marketing materials and websites, branding of information centres and any other insignia
International Promotion	• Primary responsibility for devising and executing the international destination marketing plan • Meet with regional bureaus and private	• Select from the national 'menu' of international promotion activities those in which the regional bureau want to participate and work with ETO in executing such

Marketing Function	ETO Role	Regional Bureau Role
	sector on a regular basis to consult with them and convey to them the international marketing plan and soliciting their participation where feasible • Provide promotional platforms (e.g. national exhibition stands, trade workshops, campaign web-pages, print and digital 'shell' designs, etc.) and a 'menu' of international promotion activities from which regions can select participation on a self-funded basis • Spearhead online marketing and provide guidance and monitoring to ensure that website design, architecture and content reflect Ethiopia as a clearly 'branded house'	participation • Where regions attend any international promotion opportunity without the ETO, agreement should be obtained prior to the occasion to ensure that the brand application and scope of regional activities support the national strategy • Develop regional websites in line with national guidelines and support the national online promotion drive through content management of regional websites
Domestic Promotion	• Provide an overarching domestic marketing campaign identity and some 'anchor' promotional activities that form the basis of the campaign, with opportunities for regional participation • Coordinate and communicate with regions to ensure that their promotion activities support the national campaign direction	• Regional Bureaus to lead domestic marketing for their respective areas • Inform the content and production of national 'anchor' promotional activities • In addition to national 'anchor' promotional activities, implement any other domestic marketing activities devised at regional level • Apply the brand architecture at regional level
Product Development and Packaging	• Lead the packaging of the Great Origin Route network and work with Regional Bureaus in conceptualising the GOR and sub-routes • Audit and identify product improvement needs at sites and attractions of national importance and canvass participation by the regional offices for planning and improving such sites	• Appoint a tourism product champion to work closely with ETO in conceptualising the Great origin Route and sub-routes • Launch a site improvement program in support of and to complement the ETO product development initiatives
Visitor information services	• Devise the framework, criteria and branding for the Ethiopia i-Network • Provide support to Regional Bureaus for implementing the i-Network concept e.g. branding materials and signage, staff training, etc. • Monitor the implementation of i-Network, produce a portfolio of branded print and digital promotion and information materials as proposed and garner regional input in	• Work with ETO in classifying, refurbishing and affiliating VICs at regional level and training up staff • Produce regional printed and online promotional materials, in support of the Ethiopia marketing strategy and brand and follow Land of Origins brand disciplines and architecture in producing these • Manage online and print content

Marketing Function	ETO Role	Regional Bureau Role
	producing these	and distribution of digital and print materials and content
Service and awareness training	• Develop the Tena Yistilign tourism program in consultation with the regional bureaus • Train up regional champions for managing the Tena Yistilign program at regional level • Monitor implementation of the program	• Appoint a regional champion and contact point for implementing Tena Yistilign • Work with ETO in implementing Tena Yistlign and regional level

7.4 Adequate funding

Current funding for implementing this strategy is wholly inadequate and Ethiopia's tourism marketing budget compares poorly with that of other developing tourism destinations. Implementing this strategy will require a significant increase in marketing funds. The following mechanisms will be pursued in this regard.

1. A tourism departure or bed levy

A departure levy is the simplest and most effective mechanisms for implementing a tourism tax to fund tourism marketing. Such levy can be absorbed as a passenger tax on every air ticket, with airlines in turn paying over the funds to the proposed Tourism Growth Fund (see below). It is estimated that a US$ departure levy on long-haul flights could return US$11 million to US$12 million per annum in 2016. It is a prerequisite that levy funds should accrue to a dedicated Tourism Growth Fund and that they should be used only for tourism marketing purposes.

2. Tourism Growth Fund

The TGF will be set up under the auspices of the ETO with proper financial accounting and governance. Passenger levies will accrue to the Tourism Growth Fund and such funds will be used exclusively for destination marketing. The performance of the Growth Fund will depend on the success of destination marketing.

3. ETO self-generated funds

ETO will set clear goals for supplementing funds generated through Government allocations and passenger levies with self-generate revenues mainly derived from sponsorships, sale of merchandise and tourism materials, and joint public-private tourism promotions. Generating own income should not detract from ETO's main mandate of promoting Ethiopia.

7.5 Monitoring and evaluation

Measuring the growth in tourist arrivals, expenditure per tourist, total tourism revenues and other performance indicators such as tourism job-creation, the revenue multiplier, etc. will require a major improvement in statistical measurement and market research. The following initiatives are proposed in this regard:

1. Valid and reliable tourism arrival statistics

Properly recording tourist arrivals by both nationality and purpose of visit is key to monitoring the strategic objectives as outlined in Section 4. ETO and MoCT will work with the immigration department in improving the validity and reliability of tourism arrival statistics. Measures should be implemented to avoid duplication of figures and wrongly stated purpose of visit.

It should be noted that ESTDP has funded the development of an Information Technology (IT) platform to manage tourism statistics in Ethiopia including information on arrivals and hotel occupation (hotels can enter information online or offline) as well as data from airport surveys. Regional tourism bureaus will have access to the data of their respective regions. Templates have been developed for data dissemination. Populating the IT system and templates with valid and reliable data remains a challenge. While a new Directorate of Statistics has been established in MoCT the unit is need of additional human and financial capacity.

In addition partnerships should be established with the private sector, immigration authorities, regional Culture and Tourism Bureaus, Airport Authority and management bodies of nature and culture attractions to provide regular, valid statistics on patronage.

The ETO should collaborate closely with MoCT to avoid any duplication in improving the availability of data and implementing measures for improving data quality and dissemination. The ETO should also create awareness among the tourism industry and the public sector about the importance of having good and timely data to guide policy, investment and marketing decisions.

2. Regular, high quality visitor departure surveys

Departure surveys among a representative sample of tourists, recording origin, purpose of travel, expenditure, length of stay, regions and experiences visited, satisfaction levels, etc. provide the best way of determining growth trends and impacts. The surveys conducted in 2013 and 2014 provide some good insights, however the methodology (especially sampling and consistency through the year) will be strengthened and the surveys will be conducted more regularly to allow for reliable trend analysis.

7.6 Tracking progress

The action plan presented in Section 8 below indicates the activities and elements that are to be carried out over the next five years, who should carry them out and a broad estimate of cost. Importantly, the implementation action plan should serve as a framework for monitoring progress with implementing the strategy and for evaluating the extent of such progress. As such it sets out the deliverables to be expected, responsibilities, costs and success indicators.

Three factors are considered critical for effectively tracking implementation of the plan, i.e.:

i) Mandating a specific individual to take ownership of the implementation monitoring process and to take 'ownership' of monitoring progress with the Action Plan
ii) Urgent improvements to ensure valid and reliable tourism arrival statistics, to ensure quantification of progress
iii) Involvement, support and capacity building of regional Culture and Tourism Bureaus and involving them in monitoring progress

The following notes pertain to the various columns of the Action Plan:

- *Elements:* These reflect the recommendations contained in Chapters 6 and 7, under the five key priority programmes of a) Encounter the Origin promotion campaign, b) Great Origin Routes, c) Tena Yistilign service and language programme, d) Ethiopia i-Network and e) Meet Ethiopia MICE program.

- *Responsibilities:* The parties responsible for carrying out the recommendations of the project are presented in this column with the lead-implementing agency indicated by the symbol (i), and supporting and collaborating parties by the symbol (ii) onwards

- *Key Actions:* Actions for which evidence should be presented following the implementation of each action element; this also reflects detailed recommendations in Sections 6 and 7 under each action

- *Years:* differentiating between actions to be executed in Years 1 and 2 and those to be executed in Years 3 to 5

- *Two-year cost estimates (US$):* The following guidelines should be noted:

    - The costs pertain only to activities proposed for the first two years of implementing the marketing strategy
    - It is expected that required funding will increase significantly during years three to five, once sound marketing foundations have been laid in years one and two
    - No provision is made for capital expenditures related to site and route improvements as these need to scoped and defined through detailed assessment and capital planning
    - The estimated costs reflected here are broad estimates and have not been subjected to rigorous cost analyses. Costs presented in the action plan are indicative and will need to be verified and finalised when budgets are agreed

- *Success indicators:* Suggested measurements to be agreed in ETO's annual business plan for successfully completing the various actions. The actual targets will be set in annual actions plans.

8 Action plan

The items in this implementation action plan follow the strategic recommendations contained in Chapter 4 and are numbered accordingly.

Elements and responsibility	Actions	Years		Estimated Cost Years 1-2 (USD)	Success Indicators
		1-2	3-5		
1. Encounter the Origin Destination Marketing Campaign Rolling out 'Land of Origins' brand identity through a multi-year, multi-channel international and domestic promotional campaign called 'Encounter the Origin', to be used as an umbrella call to action and a communication theme for all tourism promotion activities					
1.1 Campaign creative design and production (i) Lead ETO (ii) Regional Culture and Tourism Bureaus	Conceptualise campaign: detailed plan, logo, visual 'look and feel'	X		30,000	Campaign brand applied in all relevant marketing activities Number of suitable electronic applications
	Reflect campaign imagery on national and regional websites	X	X	5,000	
	Branded exhibition stands and materials	X		30,000	
	Electronic and paper-based promotional items (screensavers, displays, folders, etc.)	X		200,000	
	Short promotional videos and photo albums on website and social media	X		Under ESTDP project	
1.2 Online marketing drive (i) Lead ETO (ii) Regional Culture and Tourism Bureaus	Develop appropriate tools for online marketing				Growth in website statistics SEO ranking of official website Social media following Wi-Fi access and speed at key sites
	– Portfolio of high-quality national and regional websites	X		National: Under ESTDP project Regional: 15,000 per region	
	– National and regional social media accounts set up and populated	X		3,000	
	– Digital trade and consumer database established	X	X	10,000	

Elements and responsibility	Actions	Years		Estimated Cost Years 1-2 (USD)	Success Indicators
		1-2	3-5		
	– Content creation and updating	X	X	28,000	
	– Trained up national and regional marketing staff	X		30,000	
	– Free or affordable Wi-Fi access at key tourism points	X	X	Ministry of Communication	
	Online promotion and engagement				Users and hits on campaign pages Number of campaign packages booked Growth in mobile access to campaign offers Social media campaign following
	– Digital marketing campaign 'Encounters' launched and operated	X	X	600,000	
	– Trade 'Encounters' online marketing partnerships set up and leveraged		X		
	– Mobile destination promotion application		X		
	– Ethiopians engaged in promoting 'Encounters' on social media		X		
	Leverage online affiliates		X		Number of campaign partnerships Blogger following Number of bookings on affiliate systems
	– Suitable affiliate marketing partnerships with online distribution channels	X	X	150,000	
	– Bloggers commissioned and results tracked		X		
	– Membership of DMAI		X		
1.3 Travel trade promotion (i) Lead ETO (ii) Private sector (iii) Regional Culture and Tourism Bureaus	Exhibit at the following trade fairs, in partnership with industry and regional partners				Number of new trade contacts on database Number of joint marketing agreements (JMAs) concluded at fairs
	– WTM	X		80,000	
	– ITB	X		80,000	
	– Top Resa		X		

Elements and responsibility	Actions	Years		Estimated Cost Years 1-2 (USD)	Success Indicators
		1-2	3-5		
	– COTTM	X		40,000	Number of leads forwarded to private sector
	– Special Interest Consumer Fairs e.g. Birdfair UK and a suitable adventure and outdoor show to promote trekking		X		
	Establish and manage excellent travel trade relations	X			Number of JMAs implemented Increase in bookings through trade partners Number of new operators reached Number of travel trade hosted Number of trade partners affiliated through Lucy's Friend programme
	– Joint Marketing Agreements with selected, valuable outbound operators in core markets		X		
	– Workshops and educational visits with inbound Ethiopian tour operators	X	X	60,000	
	– Annual series of road shows in two core markets annually, including travel trade workshops	X	X	200,000	
	– Suitable tour operators identified and hosted on familiarisation visits in Ethiopia	X	X	100,000	
	– One mega familiarisation visit arranged hosted per annum, in partnership with the Ethiopian travel trade		X		
	– 'Lucy's Friend ' online travel trade educational and affiliation program developed and implemented		X		
1.4 Media and public relations drive (i) Lead ETO (ii) Private sector (iii) Regional Culture and Tourism Bureaus	Prepare suitable press kit	X		8,000	Value of media coverage from press releases Value of media coverage from press trips Number of media hosted
	Regularly formulate and publish celebrity stories	X	X	45,000	
	Regular media releases in support of campaign	X	X	50,000	
	Identify and host travel press	X	X	140,000	
	Report on achieved media value		X		

Elements and responsibility	Actions	Years		Estimated Cost Years 1-2 (USD)	Success Indicators
		1-2	3-5		
1.5 Domestic promotion drive (i) Lead ETO (ii) Private sector (iii) Regional Culture and Tourism Bureaus	Conceptualise and plan domestic campaign		X		Number of bookings linked to the campaign Number of operators and packages participating Value of regional participation
	Private operators offer affordable travel packages		X		
	PR, advertising and online drive to promote packages and stimulate domestic travel		X		
	Additional Regional Culture and Tourism Bureau domestic marketing initiatives		X		
	'Take a friend' VFR extension drive		X		
1.6 Tourism events initiative (i) Lead ETO (ii) Private sector (iii) Regional Culture and Tourism Bureaus	Update, maintain and promoted events database and Calendar of Events on website	X		20,000	Number and increase in events on calendar
	Launch events support programme for selective events		X		Growth in tourist numbers attending flagship events
2. Great Origin Routes Development Development and packaging of a core ('spine') touring route based on the main tourist sites of the northern and southern circuits, complemented by a range of themed sub-circuits and routes that branch off the main circuit and that appeal to the various market segments					
2.1 Conceptualising routes (i) Lead ETO (ii) Regional Culture and Tourism Bureaus	Identify and agree core route and regional sub-routes	X		Under ESTDP marketing materials and regional strategies	Number of routes successfully launched
	Consult and agreed route concepts with stakeholders	X	X	5,000	
2.2 Route forums and auditing (i) Lead ETO (i) Regional Culture and	Visit and audit agree routes regarding opportunities and gaps	X	X	40,000	Number of route forums Individuals
	Hold route workshops to garner stakeholder and community involvement	X	X	20,000	

Elements and responsibility	Actions	Years		Estimated Cost Years 1-2 (USD)	Success Indicators
		1-2	3-5		
Tourism Bureaus (ii) Communities (iii) Private sector	Establish route forums of key interested and affected parties and appoint 'champions'	X	X	30,000	participating in route forums
2.3 Route mapping and promotion (i) Lead ETO (ii) Regional Culture and Tourism Bureaus (iii) Communities (iv) Private sector	Map routes on website, printed maps, etc.	X	X	Under ESTDP marketing materials	Number of routes on website Growth in website analytics of route maps and pages Growth in visitors numbers at sites on routes
	Promote routes to trade, media and consumers as part of 'Encounter the Origin' campaign elements	X	X	70,000	
2.4 Site and facilities improvement (i) Lead ETO (ii) MoCT (iii) Regional Culture and Tourism Bureaus (iv) Communities (v) Private sector	Scope improvements required on routes prioritised	X	X	To be determined	Number of improvements made Positive change in visitor perceptions
	Improvements planned and cost estimates done	X	X	To be determined	
	'Hardware' and 'Software' improvements conducted		X	To be determined	
3. Tena Yistilign Service Quality Programme An internal tourism awareness drive to raise awareness of the value and importance of good service in the tourism					
3.1 Tena Yistilign service quality training programme (i) Lead ETO (ii) Regional Culture and	International tourism frontline service training programmes investigated and best option identified	X		30,000	Number of courses offered
	Cooperation established with foreign mission and tourism partners to implement suitable programme	X		-	Number of frontline staff passed

Elements and responsibility	Actions	Years		Estimated Cost Years 1-2 (USD)	Success Indicators
		1-2	3-5		
Tourism Bureaus (iii) Private sector	Programme implemented in key tourism areas		X		Positive change in visitor perceptions of service quality
	Service quality tracked and monitored		X		
3.2 Tena Yistilign guide and language training academy (i) Lead ETO (ii) Regional Culture and Tourism Bureaus (iii) Private sector (iv) Community organisations	Guide and language training gaps and needs assessed in association with regional Culture and Tourism Bureaus	X		40,000	Number of guides trained Number of additional language abilities
	Selective foreign missions and cultural organisations approached and language and guide training programmes devised in association with willing partners	X		Foreign donor funding	
	Programmes implemented		X		
3.3 Tena Yistilign Annual Tourism Awards (i) Lead ETO	Awards committee established and patron appointed and awards plan developed with categories and logistics detailed		X		Number of entries for Awards
	Awards launched, entries received and evaluation conducted		X		
	Successful awards ceremony held		X		
4. Ethiopia Tourism i-Network A network and portfolio of tourism information offices and materials that display the brand and operate at a high-quality level					
4.1 Network of branded Visitor Information Centres (VICs) (i) Lead ETO (ii) Regional Culture and Tourism Bureaus	Classification, standards system and branding of VICs for i-Network devised and agreed	X		5,000	Number of VICs assessed, affiliated and branded Number of staff trained Growth in visitor numbers and enquiries
	Audit conducted of staff capacity, technology and facilities of all centres and improvement plan drafted	X		25,000	
	Centres classified and branded	X		150,000	
	Staff capacity building programme launched and executed		X		
	Facilities and technology improved in a phased manner		X		

Elements and responsibility	Actions	Years		Estimated Cost Years 1-2 (USD)	Success Indicators
		1-2	3-5		
4.2 Portfolio of high quality marketing and information materials (i) Lead ETO (ii) Regional Culture and Tourism Bureaus	Detailed scoping of materials described in strategy finalised	X		Under ESTDP marketing materials	Number of brochures distributed
	Suppliers and providers appointed	X		Under ESTDP marketing materials	
	Materials produced and distributed	X		Under ESTDP marketing materials	
5. Meet Ethiopia A national initiative to promote Ethiopia and in particular Addis as destination for Meetings, Incentives, Conventions and Exhibitions (MICE) starting with a Convention desk with the intention of establishing a national Convention Bureau					
5.1 MICE capacity strengthening (i) Lead ETO (ii) Convention centres (iii) Private sector	Establish a Convention unit/desk at ETO	X		Staff cost	Growth in MICE partners and suppliers Growth in suitable MICE capacity
	Feasibility study and destination audit of suitable venues, accommodation and services inventory	X		35,000	
	Identify suitable operators to handle MICE	X		-	
	Support the first MICE East Africa Trade Show	X		20,000	
5.2 MICE marketing (i) Lead ETO (ii) Convention centres (iii) Private sector	MICE brand / logo origination	X		12,000	Growth in MICE delegates to Ethiopia Number of successful conference bids Growth in MICE contacts on database Number of MICE intermediaries hosted
	Communication development (MICE section on website, printed collateral, PR)	X	X	35,000	
	Arrange familiarisation trips to meeting and incentive buyers	X	X	60,000	
	Develop a marketing strategy for packaging of pre/post tour itineraries to take to market	X	X	50,000	
	Initiate MICE market delegate research to better understand the sector		X		

Elements and responsibility	Actions	Years		Estimated Cost Years 1-2 (USD)	Success Indicators
		1-2	3-5		
	Attendance at trade shows e.g. Meetings Africa, Johannesburg – annually in February IMEX[18], Frankfurt – annually in May IBTM[19] World, Barcelona – annually in November	X	X	65,000	
6. Implementation capacity Developing adequate capacity for implementing the strategy					
6.1 Strengthening ETO (i) Lead ETO	Structure ETO appropriately to implement the strategy	X	X	Institutional budget	Level of success in implementation of marketing strategy Improvement of staff skills and capabilities
	Assess and improve employment conditions and recruit high-quality expertise	X		Institutional budget	
	Outsource suitable services as necessary	X		To be determined	
	Appoint market-based representatives in key markets with suitable performance targets	X	X	2,000,000 (Incl. activities)	
	Engage and educate foreign embassy staff in support of ETOs marketing drive	X	X	Foreign Affairs budget	
	Assess training needs in ETO and arrange and conduct suitable staff training	X	X	60,000	
	Provide technical assistance to the regional tourism bureaus and facilitate the exchange of experiences	X	X	40,000	
6.2 Strong and functional partnerships	Form 'TEAM Ethiopia' through a formalised marketing partnership with Ethiopian Airlines, Regional Culture and Tourism Bureaus and other key parties	X		Team budgets	Number of MOUs concluded Extent of activities

[18] IMEX – The worldwide exhibition for incentive travel, meetings and events
[19] IBTM World – International business tourism market

Elements and responsibility	Actions	Years		Estimated Cost Years 1-2 (USD)	Success Indicators
		1-2	3-5		
(i) Lead ETO (ii) Regional Culture and Tourism Bureaus (iii) ET Airlines (iv) Private sector (v) Culture and Nature conservation bodies	Establish a representative Marketing Committee and special Product Workgroups	X		10,000	undertaken by Marketing Committee Extent of partnerships with regional Culture and Tourism Bureaus
	Agree and formalise clear tourism marketing roles and responsibilities between ETO and Regional Culture and Tourism Bureaus	X		---	
6.3 Adequate funding (i) Lead ETO (ii) Ministry of Finance	Investigate, motivate and implement a suitable tourism departure levy	X	X	To be determined	Growth in ETO revenues Growth in ETO self-generated revenues
	Establish and manage a Tourism Growth Fund	X	X	To be determined	
	Generate a suitable proportion of own funds		X		
6.4 Monitoring and evaluation of market performance (i) Lead ETO (ii) Regional Culture and Tourism Bureaus	Conclude information partnerships with Immigration, Airport, Airline and other authorities to ensure valid and reliable tourism arrival statistics	X			Level of completeness of IT platform Reliability and validity of tourism arrivals statistics Validity, reliability and frequency of visitor surveys
	Populate MoCT IT Statistical Platform with valid and reliable statistics	X		15,000	
	Improve methodology of exit survey and conduct regularly	X			
	Publish consistent statistical indicators to monitor market performance	X	X	24,000	
TOTAL (2 Years)				**4,750,000**	

Addendum A: Detailed Marketing SWOT Analysis

Strengths	Weaknesses
Positioning	
• *Growing, positive country awareness:* International awareness is growing of Ethiopia as an economic success story • *Excellent growth foundations:* The range of inherent natural, cultural and historic resources coupled with convenient air access and fair value for money provides solid foundation for building a strong competitive positioning • *Strong brand themes:* The unique history, culture and landscape coupled with friendliness and hospitality provide for a good destination brand recipe • *Strong recent tourism growth:* Very good growth has been recorded in tourism arrivals over the past decade, especially from traditional markets in Europe and the USA • *Tourism a Government priority:* The Government places a high priority on tourism as a driver of economic growth and job creation • *Consistent visitor flows through the year:* Seasonal market fluctuations are limited due also to a moderate climate • *Good length of stay:* The majority of visitors stay 14 days or longer providing a good yield per traveller • *Good visitor safety:* The international travel trade rate visitor safety highly and this is an important underlying tourism message and strength	• *Global tourism awareness of Ethiopia remains limited*: International awareness of Ethiopia as a tourism destination is limited and the country has a limited tourism market share • *Market misperceptions:* The majority of international travel trade and consumers do not have clarity regarding the prevailing positive social and economic conditions in the country • *Brand application lacks clarity and discipline:* The tourism brand identity has not been clarified and a fragmented destination image is projected by the national and regional tourism authorities • *Limited leisure tourism share:* Less that a third of arrivals are discretionary travellers (i.e. who do not travel to Ethiopia by default such as holiday, conferencing, etc.) • *Moderate visitor yield:* Receipts per visitor is 'average' compared to other destinations in Africa • *Weaknesses in the tourism value chain:* Tourism facilities, road access and service levels are limited and often of poor quality • *Tourism concentrated in a few areas:* Addis Ababa received the majority of visitors while Amhara, Oromia, SNNP and Tigrai attract significant visitor proportions; tourism arrivals are very limited in other areas • *Visitor health and hygiene factors require improvement:* Aspects such as food and water safety need improvement and visitor communication in this regard is important
Product	
• *Global tourism landmarks:* Ethiopia boasts a large number of globally recognised tourism icons as basis for a strong positioning and attractiveness • *Unique events:* Ethiopia celebrates various colourful traditional events and festivals and some of these could be further developed and promoted for tourism • *Unique special interest products*: The country	• *Inadequate tourist facilities:* The variety and quality of tourism facilities e.g. tourist information, accommodation, restaurants, toilets, rest and shade areas, etc. is limited • *Insufficient product interpretation and packaging:* Product interpretation and guiding services require improvement for doing justice to the Ethiopian 'story'

Strengths	Weaknesses
offers unique experience for Bird watchers, cultural and archaeological explorers, and outdoor sport enthusiasts, among others • *Good examples of community-based tourism*: Past efforts by the Ethiopia Sustainable Tourism Alliance (ESTA) and others have resulted in some good CBT pilot projects	• *Gap in visitor infrastructures*: Some key sites require improvements in feeder access roads, visitor walkways and basic visitor safety measures • *Lack of a tourism events strategy*: While cultural and sport events could be powerful travel motivators, there exists no strategy to maximise their potential • *Community-based tourism projects not sustained:* There are various examples where CBT projects were started with external support but where such support is not sustained
Promotion	
• *Some good printed marketing collateral:* ready for improvement: The national and regional travel guides and brochures are rich in content and provide a good basis for a streamlined portfolio of market collateral	• *Limited destination promotional initiatives and resources*: Promotions are largely limited to trade show presence and a small number of travel media visits • *Marketing operations mostly geared at traditional market segments, methods and channels:* There is limited market diversification towards the more personalised, independent and special interest segments • *Lack of digital promotion*: Poor website presence and inactive social media marketing are considered the most glaring promotional gaps at both national and regional levels • *Promotional materials and initiatives are fragmented:* The national and regional tourism authorities do not follow a cohesive promotional approach and image • *Trade fair attendance lacks a clear strategy*: Performance targets, preparation and engagement at travel fairs
Price point	
• *Moderate value for money some good value aspects:* Some aspects like eating and drinking provide comparatively good value for money	• *Relatively high transport costs:* As a touring destination transport between attractions (ground and air) escalates the cost of visiting • *Some inconsistency and fragmentation in pricing*: Entrance prices to some parks and historical sites have increased substantially. Pricing of some experiences are not streamlined and entails multiple payments (entrance, guide, militia support, etc.

Strengths	Weaknesses
Place/distribution	
• *Good network of tourist information offices:* VICs exist at all main tourism centres • *Excellent air connectivity:* Ethiopian Airlines has good connections and discounts on domestic travel routes (See ***Addendum F***) • *Loyal but limited travel channel following*: Most international tour operators that actively sell Ethiopia are passionate about the country	• *Poor travel trade channel awareness and knowledge:* The majority of foreign, long haul tour operators are not aware of and educated regarding the depth and variety of experiences on offer • *Immature inbound tourism sector:* Although there are more than 300 registered tour operators the majority are ground handlers and transport providers and do not adequately fulfil the role of Destination Management Companies (DMCs) • *Tourist information offices in need of support and refurbishment:* Most VICs do not reflect the Ethiopian brand, staff require training and there is a shortage of information technologies and materials
People	
• *Friendliness and openness of citizens:* The travel trade and consumers interviewed have all highlighted the 'people spirit' as a major tourism asset	• *Local awareness of tourism lacking:* The majority of local communities and citizen are not well informed regarding the requirements and benefits of a growing tourism industry • *Insufficient marketing capacity and skills:* Marketing knowledge and skills (e.g. digital marketing, travel trade relations, brand management etc.) is limited
Processes	
• *Good marketing institutional model*: ETO autonomy and flexibility to respond to market demands secured • *Basis laid for public-private partnership:* The Board of ETO consists of both public and private partners • *Exit surveys are a good start to improved market intelligence:* The 2012 and 2013 exit surveys provide a good basis for expanding market knowledge	• *Weak ETO staff capacity*: Staff numbers and capacity in ETO is inadequate for fulfilling the task at hand • *Inadequate marketing funding:* Funding for tourism marketing is very limited compared to competitors • *Poor foothold in target markets*: ETO has no international representation in key markets • *Limited public-private marketing partnerships:* Although public and private sectors cooperate there are few practical marketing partnerships in operation • *Inadequate market measurement and research for decision making*: The reliability and validity of tourism statistics and research is inconsistent and in need of strengthening

Opportunities	Threats
Positioning	
• *Capitalising on favourable global trends:* The country is well positioned to capitalise on global tourism market preferences for authenticity, growth in both mature and younger 'experience-seeker' travellers • *Developing MICE tourism*: Being the headquarters of the African Union and various other global organisations and having good conference facilities creates a major opportunity for expansion of MICE • *Promoting Ethiopia's 'new beginnings'*: The heritage and messages related to Ethiopia's recent democratic and economic emergence provide for a compelling story and can support the tourism positioning	• *Destruction of fragile resources:* Poorly managed economic development and tourism growth can destroy the very essence of Ethiopia's authenticity and unique historical, natural and cultural tourism resources • *Potential local and regional crises:* global events have shown that tourism destinations should be prepared to deal with and communicate effectively in times of crisis
Product	
• *Packaging largely unexplored but unique experiences:* Experiences like serious trekking, coffee exploration, adventure tourism activities, etc. have been identified by local operators as having potential • *Deepening and intensifying the Ethiopia journey:* Continuously adding value to the Ethiopian experience through local engagement such as visits to communities, using alternative transport methods, participation in local cooking and Amharic writing, etc.	• *Inability to manage visitor pressures*: As tourism pressures mount, greater emphasis will be required to ensure consistent pricing and value for money, ticketing controls to avoid 'lumpy' visitor movements and ensure a quality visitor experience, • *Slow investment take-up in upmarket facilities and products in leisure areas:* For Ethiopia to sustain a high value proposition will require investment in higher quality accommodation and tourist facilities
Promotion	
• *Leveraging latent market segments:* The revenue and word-of-mouth potential of Transit, VFR and Business Tourism visitors could be harnessed, especially through social media and special promotions • *Promoting domestic tourism:* the growing middle class and expatriate market presents a huge opportunity and marketing efforts should capitalise on the potential • *Expanding flexible and independent travel:* Ethiopia relies heavily on packaged leisure travel and has a real opportunity of growing tailor-made and independent market segments	• *Continued poor internet connectivity:* Exploratory travellers increasingly rely on online sources fro planning their journey on-the-go and for sharing their experiences with friend and family back home, presenting a major promotional opportunity

Opportunities	Threats
• *Capitalising on Ethiopia's popularity with the older visitor:* Ethiopia already attracts a substantial proportion of older visitors and ET could capitalise on this by promoting country as a destination for the 'mature explorer', a growing market segment as more travellers are mobile as they grow older • *Partnering commercial travel guides:* Guidebooks like the Bradt and Lonely Planet provide excellent visitor references and could possibly be partnered • *Producing high quality promotional tools under ESTDP marketing materials project:* The ESTDP project is funding various productions and if done correctly this could substantially elevate the brand image and promotional impact	
Price point	
• *Continuously improving value for money***:** Product and service quality should be continuously improved through training and information distribution	• *Danger of expensive and poor value-for-money perceptions:* As tourism grows and demand outstrips supply, there is a possibility of inflationary pricing, which could quickly lead to negative perceptions and social media exchanges
Place/distribution	
• *Marketing collaboration with Ethiopian Airlines:* The airline has marketing and sales offices throughout the world and its route network is well established in Ethiopia's key markets. This presents excellent joint marketing opportunities	• *Inadequate adaptation to online marketing dynamics and channels:* Ethiopia is behind when it comes to digital marketing and online, especially mobile distribution channels, which are expected to progress rapidly in the next few years
People	
• *Retaining and building on the authentic hospitality of the Ethiopian people:* Local hospitality and the spirit of the people is a major tourism asset and resource that should protected and enhanced as a cornerstone of the tourism experience	• *Negative social and cultural impacts of unmanaged tourism and other commercial developments:* Displacement of cultural lifestyles through poorly managed agricultural expansion and insensitive tourism is already having negative effects on some communities and should be addressed urgently
Processes/partnerships	
• *Building a strong Team Ethiopia partnership:* Current initiatives to strengthen tourism relations among public sector authorities and between public *and*	• *Continued underfunding and under-capacity of ETO*: ETO requires specialist marketing skills and adequate financing to do justice to the

Opportunities	Threats
private sectors is commendable and should be supported	brand and promotional mandate

Addendum B: Market Analysis

Introduction

The following section provides an overview of the key potential sources of leisure visits for Ethiopia.
It is divided into three main sections.
The first section provides an overview analysis of the key potential source markets, by country, for leisure visitors to Ethiopia. Markets are categorised into four broad groups. The second section provides portraits of the characteristics of the main source markets, by for example, demographics, outbound market size, trips to Ethiopia and visits to comparator destinations.
The third and final section outlines the key markets segments for Ethiopia – their activities, interests demographics, etc.

Overall market composition

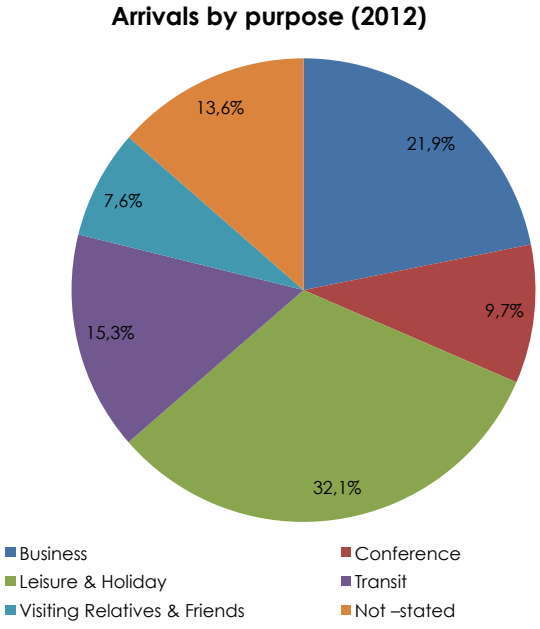
The chart (right) summarizes the breakdown of arrivals to Ethiopia by purpose (based on 2012 data).

- The leisure and holiday market is the largest single market accounting for about a third of arrivals (32%).

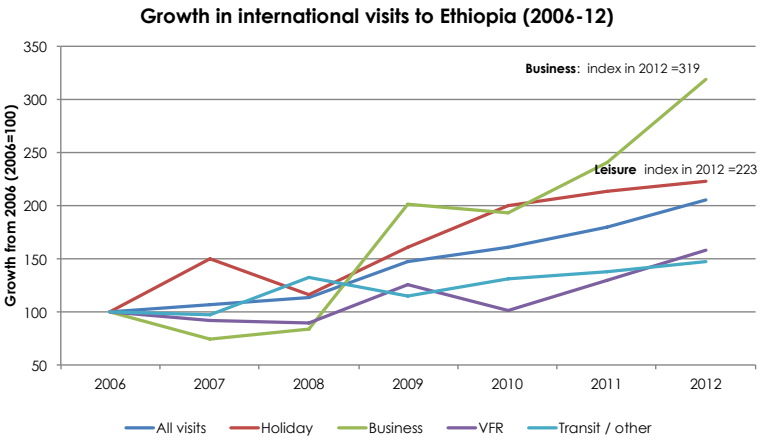
- General business visitors accounted for 22% of arrivals with conference visitors accounting for a further 10% [20]. Together this market was about the same size as the leisure market (i.e. nearly 32%). The ratio of leisure tourism is low compared to more established tourism destinations

- Transit visits are the next largest market (at least in volume terms – 15%).

There are however some grey areas in this analysis. For example nearly 14% of visits are 'not stated' – i.e. purpose of visit was not recorded. In addition, the World Bank [21] estimate business



Source: MoCT.



Source: MoCT (2013)

[20] Trends in purpose of visitation unavailable

[21] Ethiopia's tourism sector: Strategic paths to competiti

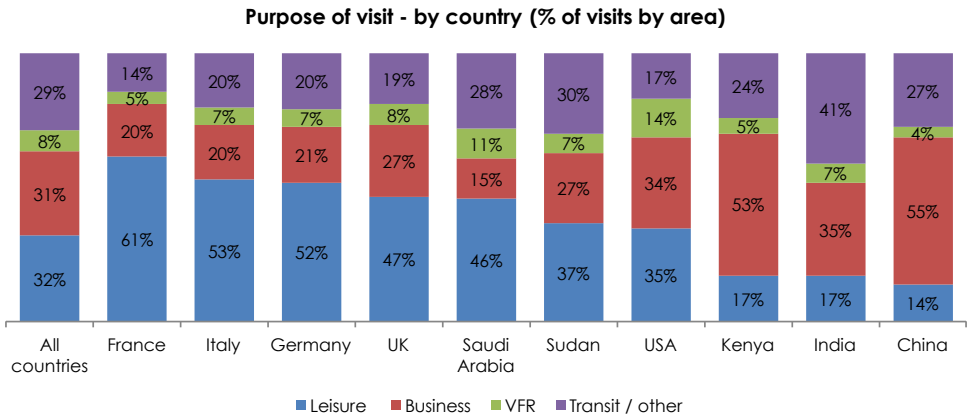
visits may be more significant due to many business travellers entering on a tourist visa while their main purpose is business. VFR and diaspora may also be understated.

- Growth in arrivals over the last few years has varied by purpose of trip. Business (including conference) visits have grown the most significantly albeit this has been slightly erratic (with a dip in 2007 / 2008 – the start of global recession). Leisure visits have also experienced relatively robust growth from 2006, although not as buoyant as business during the period 2010-2012. NOTE: this trend may be influenced by changes in requirements for business visas.

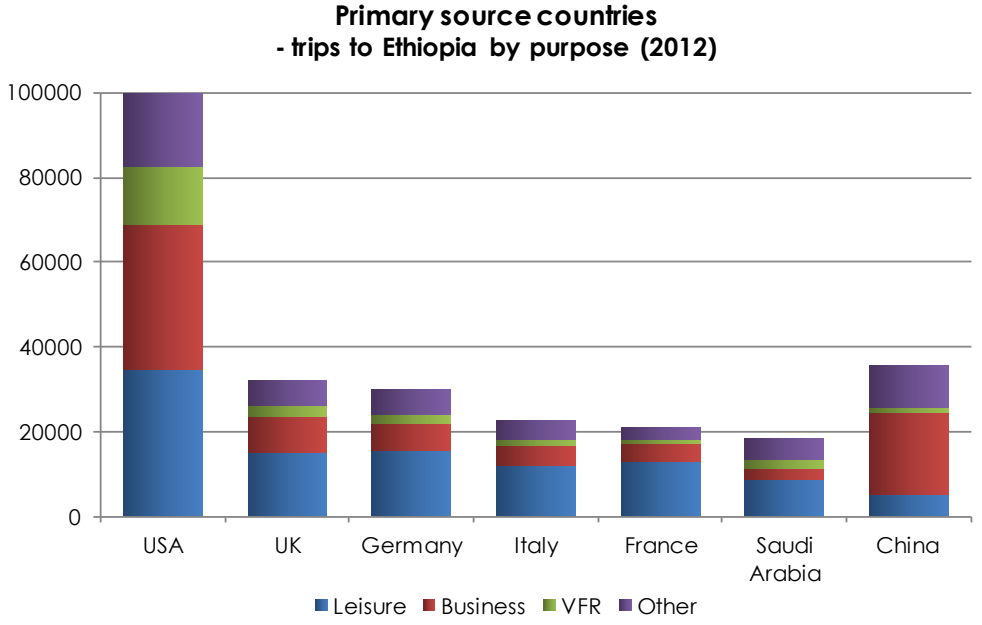
The following charts show the breakdown of visits by purpose from different world regions.

- Europe (particularly France, Italy, German and UK) and, to a lesser extent, the Middle East (in particular Saudi Arabia) were more likely to be holiday visitors. Visitors from the Americas (mainly the USA and Canada) were more likely than other visitors to be visiting friends and relatives (most probably due to the large diaspora in the USA) and were equally inclined to be on holiday or business, although the leisure inclination of USA visitors is significantly lower that that of visitors from Europe.

- The figures below indicate that Asian visitors (mainly from India and China) and visitors from Africa (e.g. Kenya) were significantly less likely to be on holiday or Visiting Friends and Relatives (VFR) – they were more likely in transit or on business. Sudan was an exception to this pattern – mainly leisure visits.



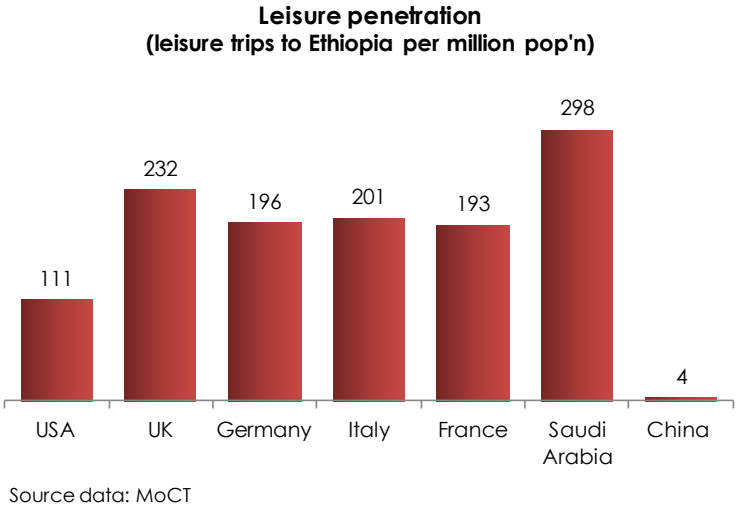
Of the core source countries, the USA generates the most trips to Ethiopia. Combined, the four European countries generate more trips.



Source: MoCT

The USA is particularly significant for business and VFR (visiting friends and relatives) trips generating more trips than the European countries combined. It is less significant as a generator of leisure visits – the European countries generate nearly 60% more leisure visits than the USA, and more leisure trips per capita.

Saudi Arabia is the smallest market of the core source countries but most visits are for leisure. Its leisure penetration factor (leisure trips per head of population) is the highest among the core countries.



Source data: MoCT

China, while a relatively large market, is generating less leisure trips than the core source markets. It has a very low leisure penetration factor.

Evaluation of source markets

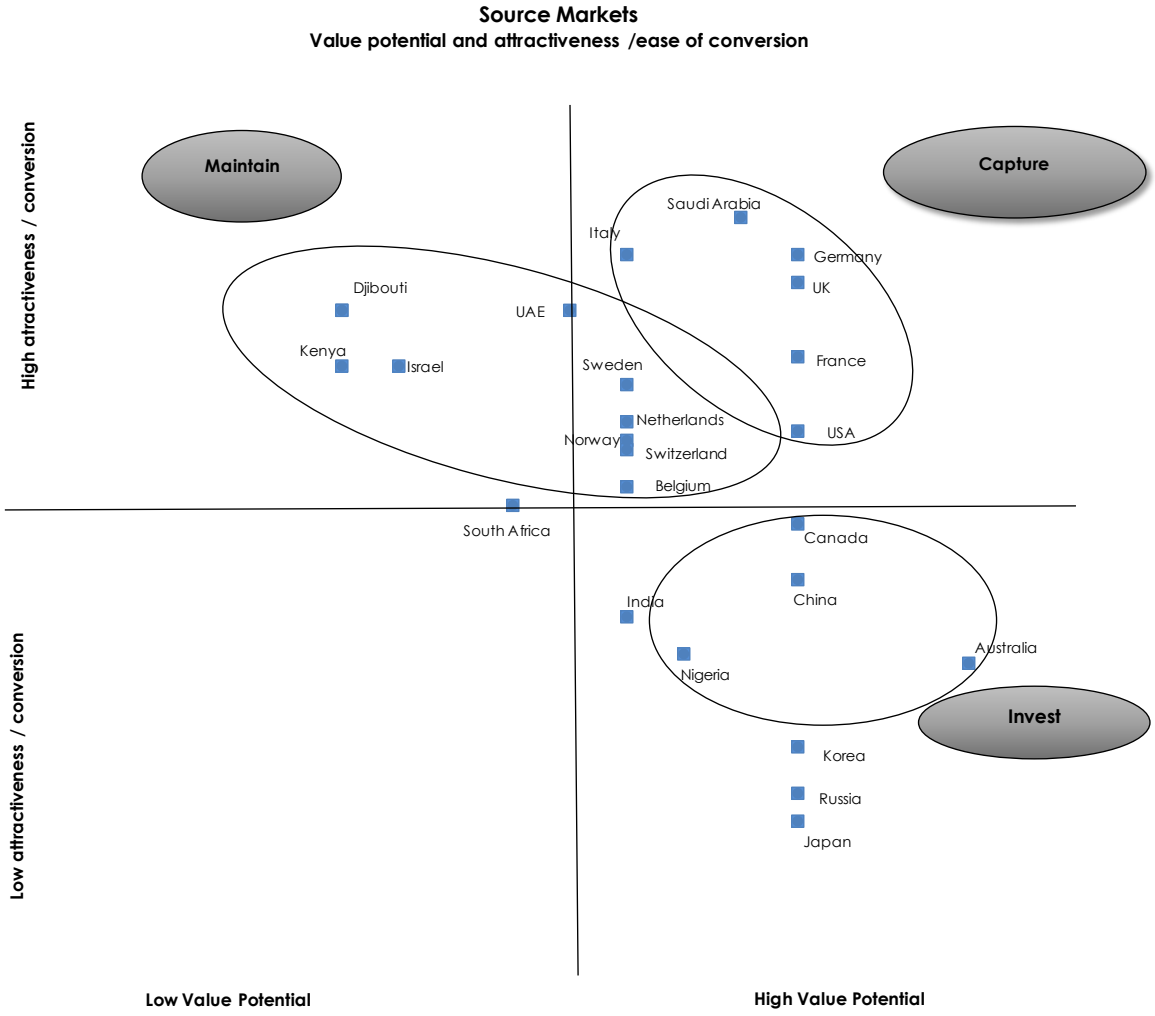
The relative attractiveness of different markets, by country, for Ethiopia have been and analysed and categorised, using available date, against two indices – these are:

- Value potential of the market – its current global importance and its future growth potential
- Ease of attracting them and converting them to Ethiopia based on, for example, transport links, current visits to Ethiopia, current penetration of Ethiopia within overall markets.

Each country was rated on a score of 1-5 against a variety of factors. Each factor was then weighted. The following table summarises the factors and weighting used to calculate the indices.

Index	Factor	Weighting
Value potential of the market	Size of outbound market - based on personal spend – (Source: UNWTO)	3
	Forecast growth in outbound tourism to 2030 (Source: based on UNWTO 2030 forecast of growth to 'emerging' countries)	1
Attractiveness and ease of conversion	Current leisure arrivals to Ethiopia (Source: MoCT)	2
	Growth (absolute) in leisure visits to the Ethiopia (2013/09) (Source: MoCT)	1
	Connectivity – based on travel times, costs and direct flight connections (Source: Expedia)	3
	Relative penetration of Ethiopia trip taking in the population	3
	Broader fit and links based on the size of other markets (business/VFR) to Ethiopia (Source MoCT.	1

The value of markets to Ethiopia and attractiveness of Ethiopia to markets is summarised in the following chart.



From the chart four potential target market groups can be identified:

- Core ('Capture') markets – high value potential, and attractiveness/ease of conversion
- High potential ('Invest') markets - high value potential but more difficult to attract convert.
- Steady ('Maintenance') markets – lower value potential but high attractiveness / ease of conversion.
- Opportunity ('Tactical') markets - lower potential value and/or more difficult to attract/convert.

These markets will have different priorities and development timescales
Core markets represent immediate target audiences for Ethiopia. These are high value markets that are already visiting Ethiopia in significant volumes. Key markets in this group are:

- North America – the USA
- Europe – UK, Germany, France and Italy
- Saudi Arabia.

The priority for this group is to increase market penetration in the short and medium term.

High potential markets – these are potentially high value markets but are currently less attractive to Ethiopia because conditions are not quite right to penetrate them fully. Issues will be around awareness and the difficulty/cost of penetrating the market, product / market fit, ease of travel, and strong competition from destinations with similar product that are closer.
These countries include Canada, China, Nigeria, and Australia.

In marketing terms these will be a slightly lower priority. The priority will be on medium term promotion with a view to growing these into the core market portfolio in the longer term

Steady markets – these are currently relatively important markets for Ethiopia but are less attractive in terms of investment in marketing activity since they are lower value markets, or have more limited growth potential. There are mainly neighbouring Middle Eastern and African markets (such as Sudan, Kenya, Dijbouti and Israel) and smaller European markets like (The Benelux and Scandinavian countries, and Switzerland).

Marketing activity should be focused on limited promotional activities with the aim at increased penetration by strengthening existing travel trade relations to ensure packages expand and deepen.

Opportunity markets – these are either lower potential value and /or more difficult to attract / convert. They include countries like South Africa, Korea, Russia, India, UAE, and Japan.

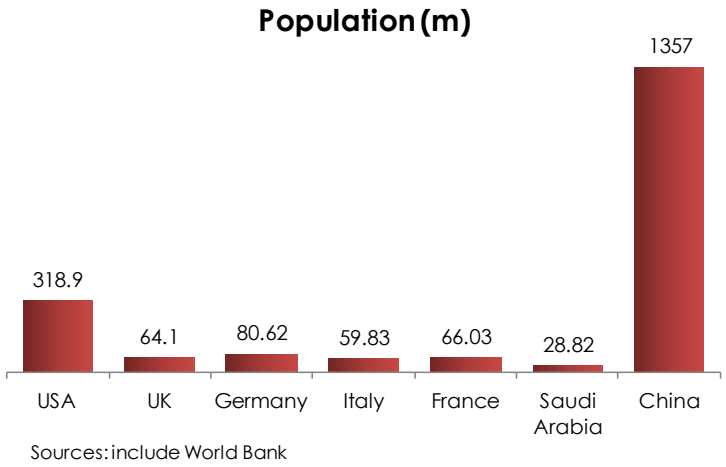
Inventions in these markets will be more tactical and opportunistic, and based on supporting relevant partners.

Key source market profiles

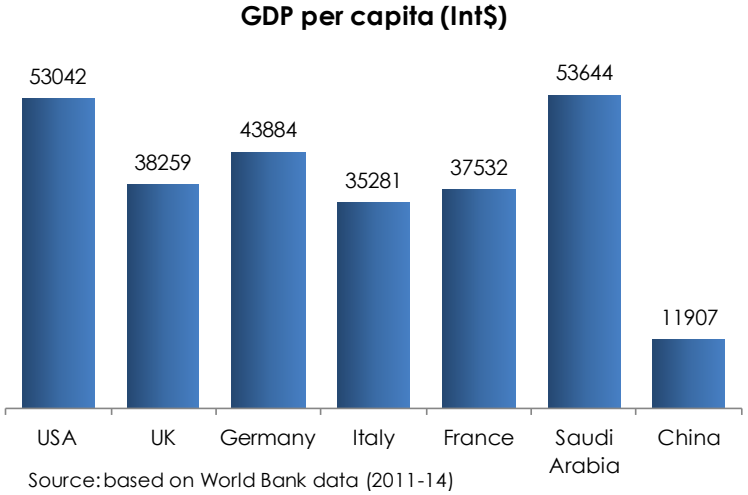
The following section provides an overview of Ethiopia's potential core markets (USA, UK, France, Italy, Germany and Saudi Arabia), and a high potential market (China).

General Statistics

- China has the largest population
- Of the core source countries, the USA has the largest population – greater than the population of the other (UK, Germany, Italy, France) combined.
- The other countries all have substantial populations – typically 60m +. Saudi Arabia is the exception (nearly 29m).
- Saudi Arabia and the USA have the highest GDP per capita at Int$53k- over 20% more than Germany.
- GDPs per capita in the other core countries are all high. All these countries are in the top 10 richest countries in the world – in absolute terms and per capita.



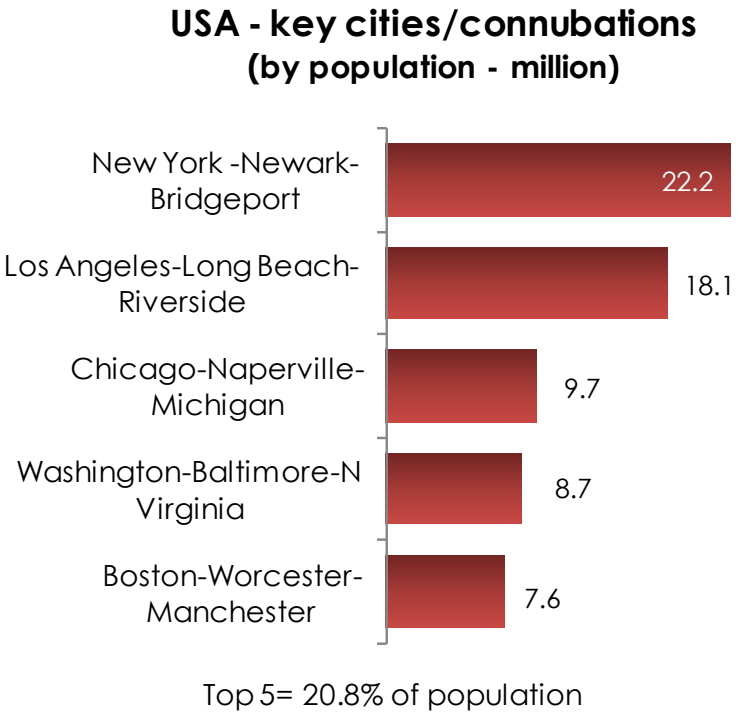
Sources: include World Bank



Source: based on World Bank data (2011-14)

- China's GDP per capita is much lower.

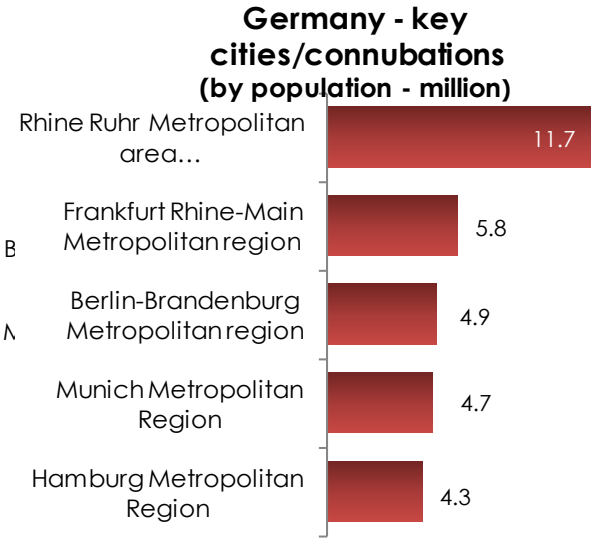
The primary source countries are all highly urbanised with substantial populations concentrated in a number of primary cities and wider conurbations[22].
In the USA about 20% of the population are concentrated in five conurbations – with over 40million people in two conurbations (New York and Los Angles).
Other significant areas (with over 6 million people) include San Jose-San Francisco, Philadelphia, Dallas, Miami, Houston, and Atlanta.



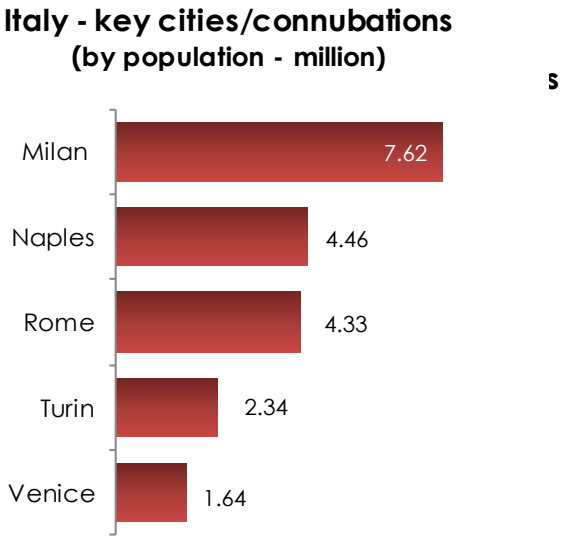
Top 5= 20.8% of population

Among the European countries, the population is even more concentrated in the largest conurbations – typically over a third of the country's population (France is the exception at approximately 28%). In the UK and France the capital cities (London and Paris) contain the primary concentrations of population (and wealth).

Germany and Italy's urban population are spread across a number of conurbations. The key ones are the Rhine-Ruhr area (which includes Dusseldorf and Cologne) and the Frankfurt area in Germany, and Milan in Italy.

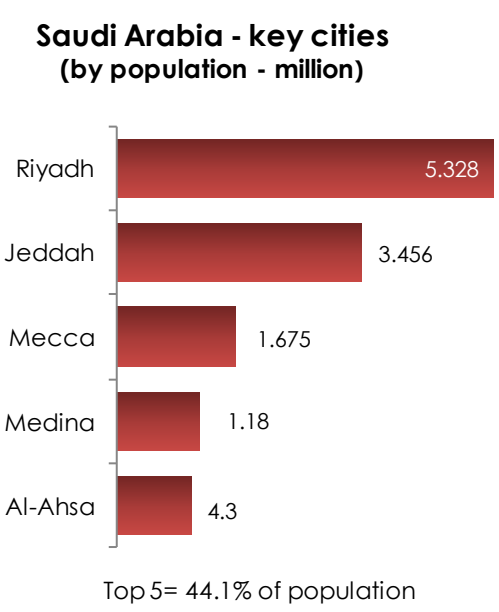


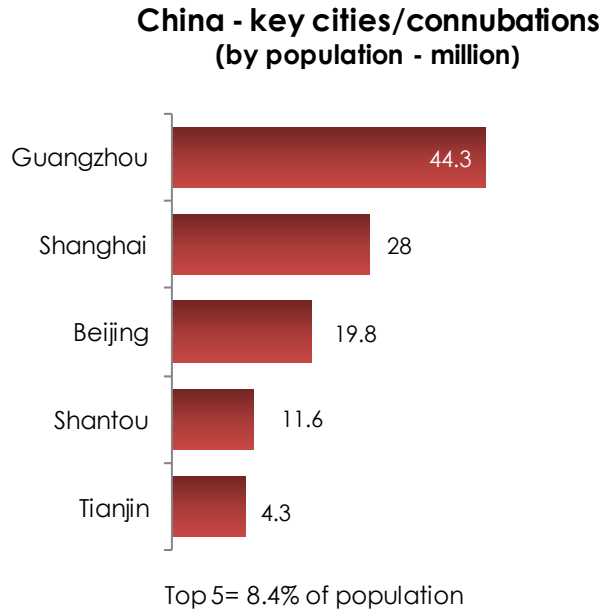
Top 5= 38.9% of population



Top 5= 34.1% of population

[22] Data on major conurbations is drawn from Wikipedia and I



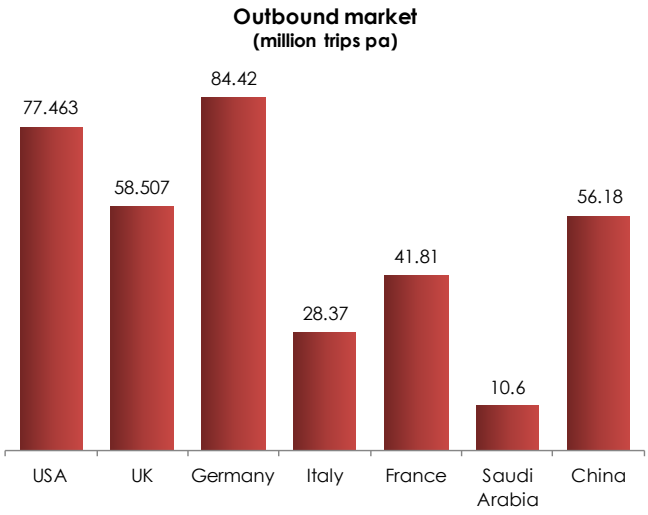


While Saudi cities are slightly smaller than other countries, the population is more heavily concentrated in key conurbations (44% of the population). China is the opposite with huge conurbations (in absolute terms) but these are less significant as a proportion of the overall population (8% - a reflection of the overall population).
Of these primary conurbations Ethiopian Airlines currently flies to the following:

- USA – Washington and Los Angeles (plus Toronto in Canada).
- UK – London
- Germany – Frankfurt
- Italy – Milan and Rome
- France – Paris
- Saudi Arabia – Riyadh and Jeddah
- China – Beijing and Shanghai

Outbound Markets

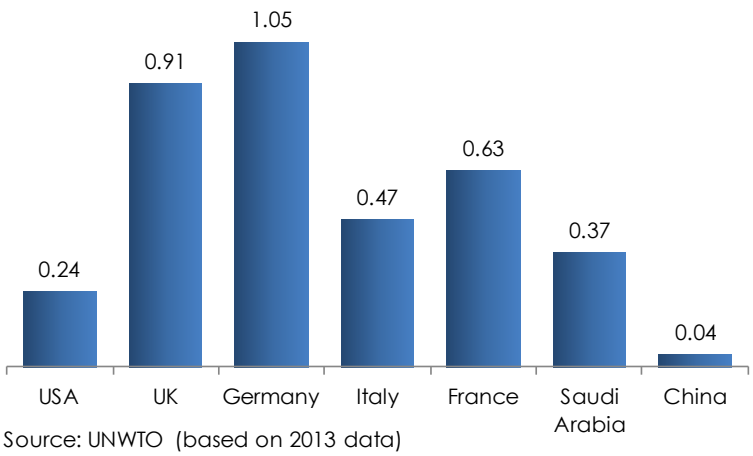
Among core markets, the USA, Germany and UK are the three biggest outbound travel markets in the world and key long haul markets. France and Italy are also significant markets. The Saudi outbound is smaller in absolute terms.
China is a large outbound market – larger than France and Italy.



Source: UNWTO (based on 2013 data)

Per capita, Germany and the UK have the most active outbound population generating on average about one trip per head of population per year - approximately four times as many as the USA market and 25 times the Chinese market.

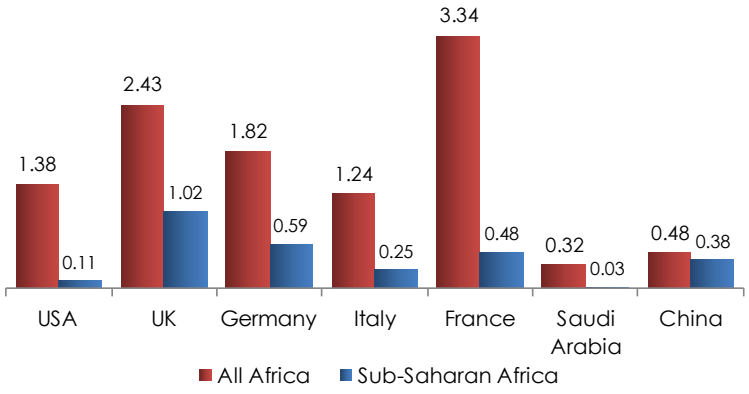
Outbound trips per capita



Source: UNWTO (based on 2013 data)

Of these markets, the French are the most likely to visit Africa (over 3.3m trips per annum) although most of this is to North Africa.

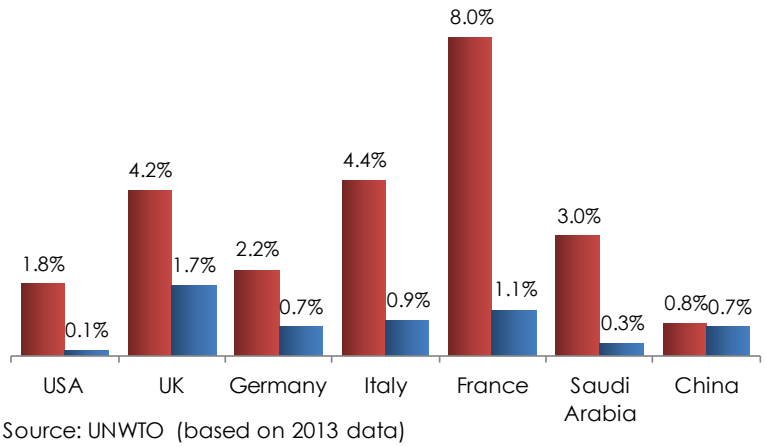
Market for Africa
(million trips pa)



Source: UNWTO (based on 2013 data)

The UK market is most likely to visit Sub-Saharan Africa, followed by the Germans.

African trips
(as % of country's outbound market)



Source: UNWTO (based on 2013 data)

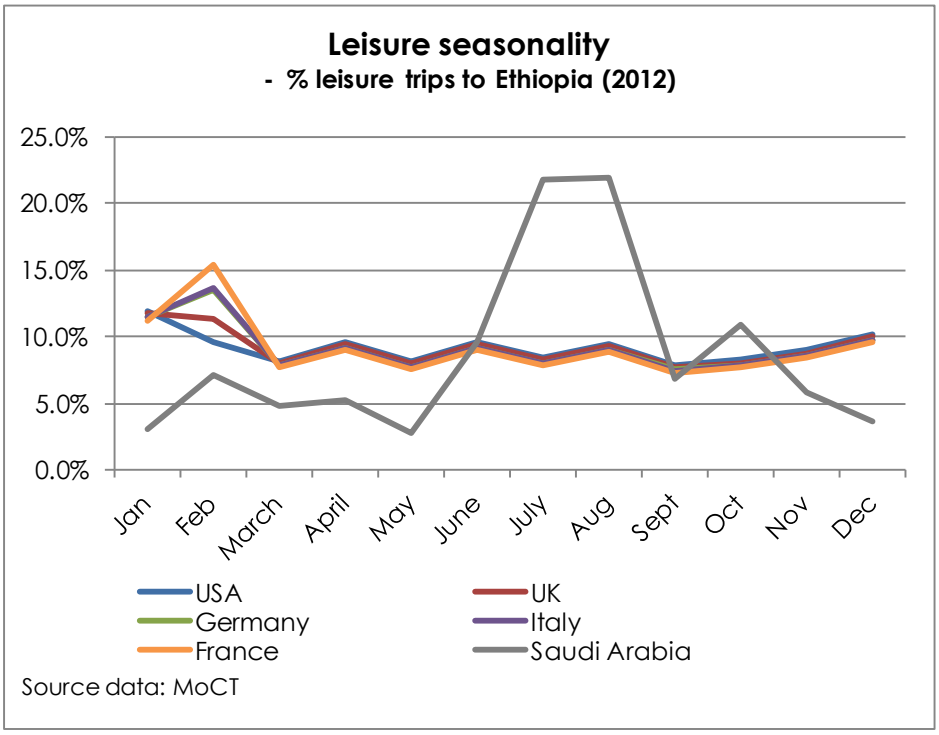
For most of the core source countries, five destinations account for the majority of outbound trips. Typically these will be neighbouring (or near neighbouring) countries.
This is particularly the case for Saudi Arabia, where nearly 84% of trips are to five neighbouring countries.

Source Countries – main outbound destinations							
USA		**UK**		**Germany**		**Italy**	
Mexico	24.5%	Spain	19.7%	France	15.4%	France	27.6%
Canada	15.5%	France	15.5%	Austria	13.9%	Spain	11.5%
France	4.0%	USA	5.3%	Spain	11.7%	UK	5.9%
Italy	3.7%	Ireland	5.0%	Italy	11.3%	Germany	5.6%
UK	3.6%	Italy	4.7%	Turkey	5.7%	San Marino	4.3%
% trips to top 5 destinations							
51.3%		50.1%		58.1%		54.7%	
France		**Saudi Arabia**		**China**			
Spain	22.8%	Bahrain	47.7%	Hong Kong	30.4%		
Italy	12.6%	Kuwait	22.3%	Macao	11.2%		
UK	9.4%	Qatar	6.3%	Thailand	8.2%		
Morocco	4.3%	Jordan	5.2%	S. Korea	7.7%		
Germany	3.8%	Yemen	2.2%	Taiwan	4.9%		
% trips to top 5 destinations							
52.8%		83.7%		62.4%			

Source: UNWTO (based on 2013 data)

While January, February and, to a lesser extent, December are peak months for leisure visits the overall pattern of leisure visits does not demonstrate particular seasonal peaks and troughs (unlike many other destinations).

Seasonal patterns of leisure visiting among the core source countries are generally similar with typically a peak in January and February.
The Saudi market is completely different with a noticeable peak in July and August – reflecting the summer exodus in the Saudi Arabia.



The Competition

Global tourism is a competitive market place. The following table highlights the level to which primary source markets visit comparable / competitor destinations – the figures are presented as a percentage relative to trips to Ethiopia.

Visits to comparator destinations (relative to visits to Ethiopia)							
	USA	**UK**	**Germany**	**Italy**	**France**	**Saudi Arabia**	**China**
Egypt	36	2617	2100	1878	820	965	75
Morocco	50	1050	833	822	8420	286	-75
Nepal	-57	0	0	-56	0	-	257
Peru	350	67	133	89	300	-	-59
Tanzania	-36	100	100	122	60	-96	-45
Vietnam	300	433	300	22	900	-96	5921

NB figures are presented as a percentage relative to trips to Ethiopia.

Source: UNWTO (based on 2013 data)

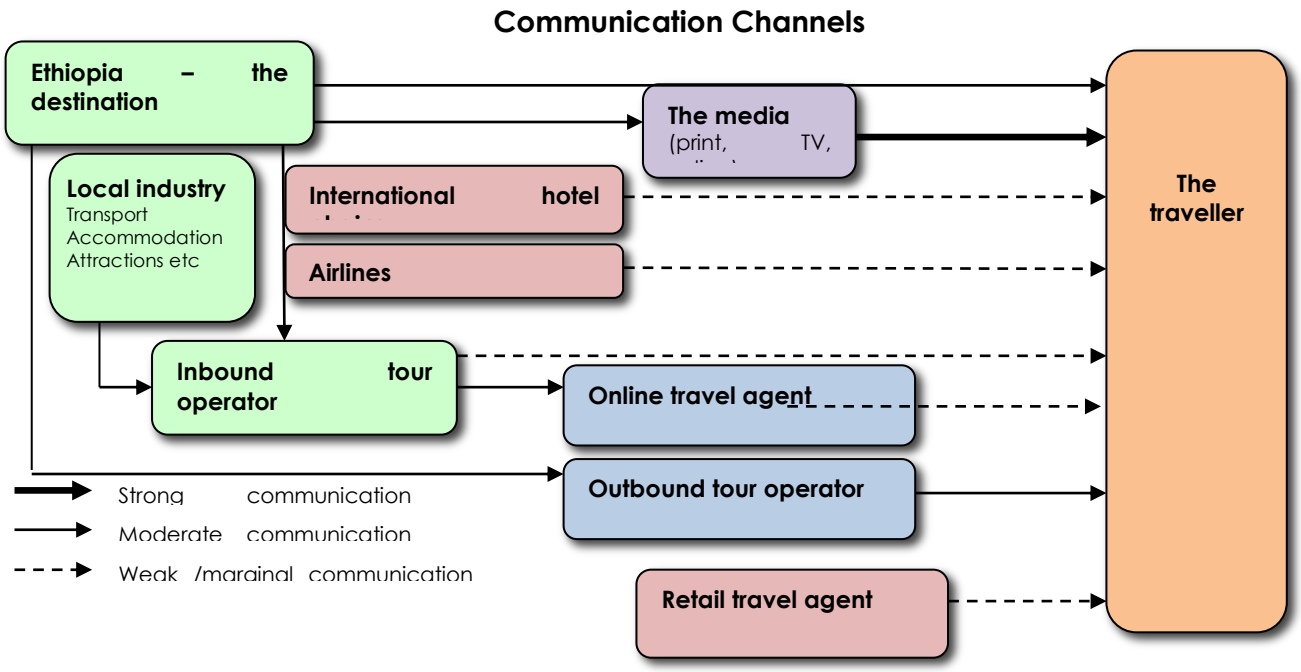
It highlights that European and Saudi Arabian markets are much more likely to visit Morocco and Egypt (even after its substantial downturn in visits) – albeit these are now established mass-market short haul destinations.

Vietnam also features strongly particularly for the Chinese and French (a product of its colonial legacy) but also for the UK. USA markets are more likely to visit Peru (relative proximity).
Saudi markets are tending to visit neighbouring and Muslim countries.

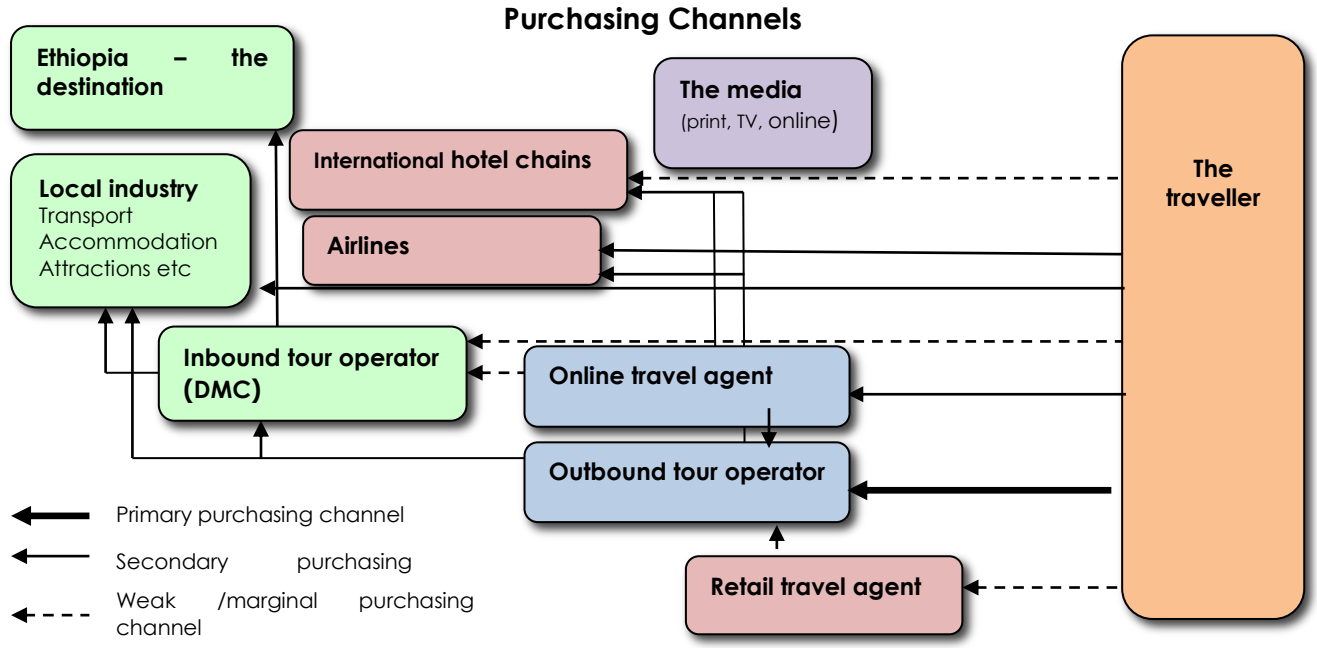
Communication and Sales Channels

The travel communication and sales chain is extremely complex with multiple players. There are a range of relationships between destinations and businesses, businesses and businesses, destinations / businesses and end consumers. The following diagrams[23] provide a simple summary of this. The first shows the communication channels – essentially the route of marketing messages and information to reach and **influence** the potential visitor (NB it excludes channels in the control of the destination – print, advertising, web etc.).

[23] Adapted from CBI Market Channels and Market Segments (CBI)



The second shows the purchasing relationship from the potential visitor – back to the end product.



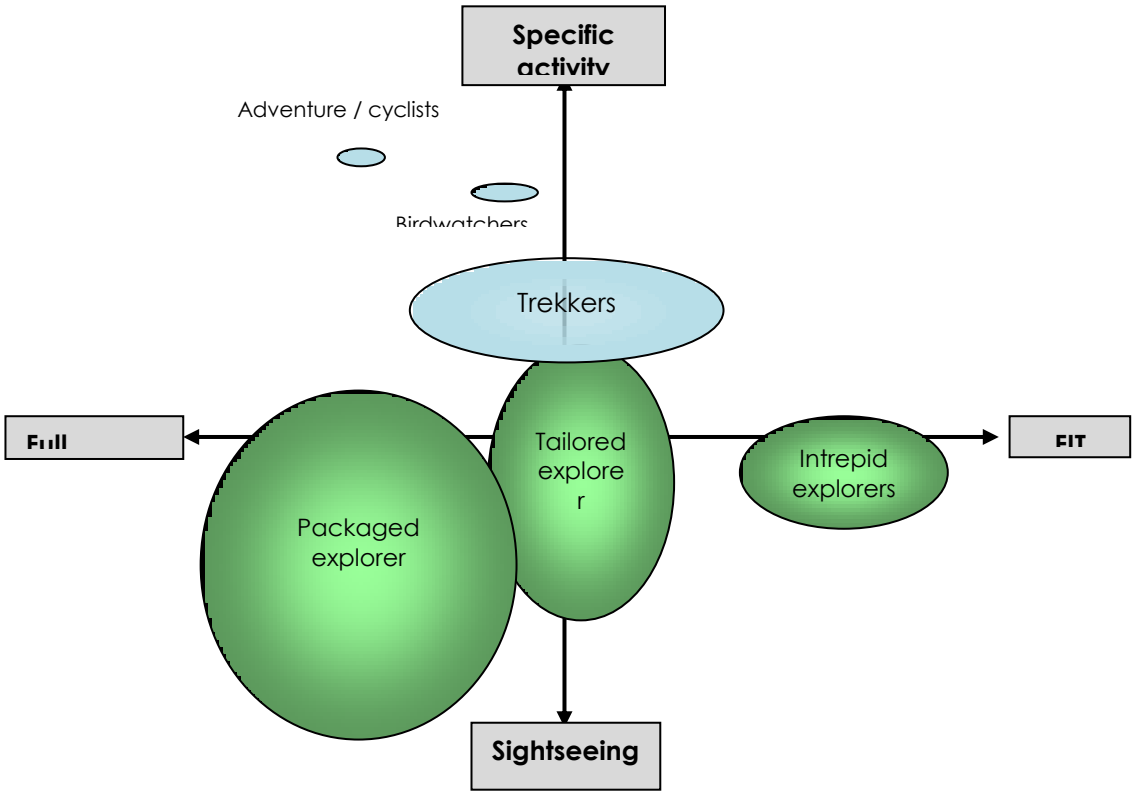
The following table discusses key channels in the context of Ethiopia. There are variations depending on the source market and some of the key ones are also outlined in the following table. It should be noted this is a brief overview – it is an area that would benefit from further research.

Key Channels	Role in communication/awareness	Role in purchasing
Media / press	Coverage through newspapers, general and specialist magazines and TV. This is a key potential source (aside from word of mouth and social media and paid for activity) for generating consumer awareness of Ethiopia. It can be partially influenced by activity from a tourism organization.	Extremely limited. Some papers may feature 'reader's offer'.
Airlines	Airlines will promote destinations where they have routes. They are however more likely to promote their overall brand, but the flag-carrier status of Ethiopian Airlines is a major brand awareness benefit. All in all is not a channel that will create significant tourism destination awareness, though.	Quite important as a sales and booking channels, especially considering the existence of Ethiopian Holidays and flight booking integration with other travel elements through GDSs and OTAs like Expedia and others MICE, independent and tailor made travellers will book direct with airlines
International hotels	Like airlines, hotel chains will promote destinations where they have a presence but this will be limited with the emphasis on the brand. Leisure-focused hotels and resorts will promote their offers against the backdrop of destination attractions and are therefore important destination promoters. Hotel brands are also important destination brand endorsers; the fact that major hotel chains invest in a destination makes it easy to arrange a trip and increases the credibility of developing tourism destinations.	Through the emergence of Online Travel Agencies like Expedia, Booking.com, Hotels.com and others, online accommodation In Ethiopia international hotels are currently largely restricted to Addis Ababa so direct bookings through OTAs are expected to be largely restricted to Addis Ababa.
Local accommodation operators	At present the role of local operators will be fairly limited. Only a few local operators will have direct reach into source markets – typically where there is a specific connection (e.g. Bale Mountain Lodges; Simien Mountain Lodge, etc.).	As indicated above, at present direct consumer to local operator purchasing pre-visit will be limited, but will grow in the future. Some fully independent travellers (FITs) may book direct. In country purchasing of such locally owned accommodation will be more common but still limited. The route to purchasing will typically be indirect through DMCs, and foreign tour operators.
Inbound tour	Like local accommodation operators, inbound	Direct consuming will be limited to

operators DMCs	tour operators will have a limited role in communication about the destination direct with the consumer. However, their contact and communication with foreign outbound tour operator partners and media is important for raising awareness of the destination, and especially new and lesser-known attractions.	some semi-independent travellers, those making tailor made packages and FITs. As independent travel increases so will direct bookings increase, especially for repeat visitors Most purchasing will be through outbound tour operators.
Online travel agents	Online travel agents / portals include companies like Expedia; TripAdvisor will normally feature content on destinations but not actively promote them. The OTAs are increasingly engaging in Joint Marketing Agreements with DMOs for promoting destination brands and promotional calls to action on their pages.	Among certain markets for Ethiopia (semi-independent travellers, those making tailor made packages and FITs), these will be an important purchasing channel – especially for airlines and accommodation.
Outbound tour operators	Tour operators will package and organize itineraries – they will typically specialize in either a geographic area or a particular product theme (or both). They have a strong role in communicating about and selling a destination through showcasing what's on offer in some depth. However, they are unlikely to be necessarily creating significant first-line awareness of the destination among consumers.	For Ethiopia, consumers are likely to purchase through outbound tour operators. These will offer both full and tailor made packages. Typically, for Ethiopia, they will be specialist operators (as opposed to mass/major operators)
Travel agents	Travel agents sell tour operator products and other individual components. In some cases they are integrated with tour operations. They may have a role in promoting the destination but, in general, for Ethiopia this is likely to be limited, unless ETO strikes up Joint Marketing Agreements with outbound tour operators who sell their packages through retail travel agent shops where they are able to promote destination images, prices packages, etc.	Ethiopia will not typically feature strongly within their offer and will mostly be sold by specialised tour operators. While most sales will be direct from consumers to specialised tour operators in some markets tour operators may conduct their sales through their own or related retail travel agent channels

Market segments

The following section provides a conceptual analysis of the potential characteristics of Ethiopia's market research. This based on a range of sources – available market research of visitors to Ethiopia (like The First International Visitors Exit Survey and the Ethiopia Tourism Statistical Management System (ETSMS) Annual report – 2015)[24], discussions with tour operators and stakeholders, other systems of market segmentation (particularly that used by South African Tourism), and our own knowledge and experience. It is a conceptual framework and should, over time, be market tested through primary research.



The diagram above conceptualises Ethiopia's potential markets. Market segments are defined by two key parameters, which are represented against the two axes in the diagram. . The first axis is about what people are **doing** in Ethiopia. It is about the relative balance between **sightseeing** (i.e. visiting key historic and natural sites, seeing the tribes, going to events and festivals, and undertaking Ethiopian experiences like markets and coffee) and undertaking a more **specific activity** (such as bird or wildlife watching, trekking, cycling or other adventure sport activities).
The second axis is about how they are **organising their trip** – from fully packaged (where a complete package is bought 'off the shelf') to fully independent where they are self-organising all elements of their trip. The size of a market is relative to the size of its 'bubble'.

A number of broad points emerge from this:

- The market tends to some form of packaging
- The bulk of the market will be motivated by sightseeing and discovery type activity. Special interest markets will be smaller although the trekking market is a potentially significant market.

[24] Both produced by MoCT

Market segment	Travel desires	Demographics and profile	Main interests and locations	Awareness and booking channels
'Embrace' segments Segments with high growth scope and which Ethiopia is ready to receive. Apply the full promotional mix and at least 60% of promotion resources to target and attract these segments over the next five years				
Packaged explorer Currently the largest leisure touring market segment but expected to decline in market share as the destination matures All Core and Invest markets Europe, USA, Asia	Cautious 'soft' exploration - looking for somewhere different – it's partly about sharing the story Need pre-arranged assurances and support and find security and confidence in numbers	Ethiopia likely second or third visit to developing countries Aged 50+ working or in early/active retirement Medium-affluence and price conscious 10-21 days Medium-small groups (6-20) booking either alone, with partner or possibly small groups of friends Fairly well read and educated	Primary: Unique historical sites and Festivals. Secondary: landscapes and nature, walking Value for money experiences at hotels, catering, guiding, etc. is important Locations: Main northern and southern circuits Could combine Ethiopia with other East African destinations	Influenced by word of mouth, press coverage, and TV programmes. Pre-visit knowledge of Ethiopia will be basic to moderate – some associations and heard of some of the key. Likely to do pre-visit planning via the internet and guidebooks. Booking and arrangement through a smaller independent tour operator; limited involvement of local inbound operator
Tailored explorer Currently not as large as the packaged leisure touring segment but expected to grow fast as destination awareness grows and services	Confident 'soft' exploration - looking for somewhere different but more experienced and want to delve deeper and veer off the traditional	Likely to have travelled to Sub Saharan Africa and other exotic destinations before Aged 45+, working or in early / active retirement. Affluent and less price-	Unique historical, cultural, environmental, scenic experiences, both key sites but also lesser-known experiences Good to high quality and special experiences at hotels, catering, guiding, etc. is important	Influenced by word of mouth, press coverage, and TV programmes. Substantially pre-visit planning via the internet and guidebooks. Significant knowledge of

improve USA, Europe	circuit Need advice, pre-arrangement and ground services especially in reaching lesser known areas	conscious 10-14 days Typically as a couple or with a small group of friends Well educated, well read and curious	Locations: Main circuits and other key sites Bale Mountains, Harar, Awash, Gheralta, Afar, etc. Getting somewhat involved in the culture of Ethiopia – visiting markets, coffee houses etc. The trip may combine with more active walking / trekking although this would be a secondary activity to sightseeing.	the key sites and attractions and some understanding of culture and traditions Booking a tailored package through a smaller independent tour operator Major involvement and advice of local inbound operators
Trekkers (See *Addendum E* for a detailed profile) Currently limited but probably largest potential of 'special interest' groups, and can expand fast More likely to be European	As with Intrepid Explorers they are confident travellers having hiked in their own countries and beyond, always in search of new mountainous and other topographical trekking areas It's about a different, off the beaten track destination	A broad group in terms of their demographics and attitudes – the key common area is the trekking. Likely to trekked in other relatively exotic locations previously but not necessarily in sub-Saharan African. Aged 35-60. Group composition could be quite mixed and include individuals, groups of friends / clubs and couples.	Experiencing exceptional landscapes and culture first hand. It's about discovery and relaxation. Trekking is the primary interest but not the only one. History, culture and wildlife will also be important components for this group, a 'living landscape'. The level (and distance) of the trekking will vary within this segment. Exercise and physical achievement are secondary components. Like other groups the 'story' is important. Locations: Prioritise and look for special topographies – Simien Mountains, Bale Mountains, Tigrai Gheralta, Possibly charity and	Influenced by word of mouth, social media, wider reading (books, newspapers, walking books) and documentaries. Substantial pre-visit planning via the internet, travel guides and specialist walking books. Good knowledge of the country; expectations may be mixed Likely to book some or their entire trip through tour operators, as full 'off the shelf' package or a tailored package. Within

		Generally well educated, well read and active Mostly medium to high affluence	teambuilding component to trekking trips.	this group there may also be some element of self organisation
Domestic and regional breaks High growth in GDP per capita is resulting in a growing domestic middle class with growing travel means The expatriate sector is large with a substantial expendable income	Main motivation is to get away from the stresses and strains of everyday work and family life, spend quality time relaxing and enjoying the good things in life Some may link this with a religious festival or event Mostly independent but will consider the travel channel with discounted pricing in mind	Affluent Ethiopian families with young children Expatriate population based mainly in Addis Aged 35-55 Traveling as small and larger domestic families (4-8 people) or individuals/ couples of expats (expats)	Relaxation along the lakesides, including soft activities like browsing, shopping, boat rides, visits to evening entertainment Mostly socialising with family and friends Expatriates may be more active and in need of experiential travel	Influenced by word of mouth, press coverage, and TV programmes. Likely to do pre-visit planning via the internet and brochures Self-arrangement and bookings of through a local travel agency depending on price package offered
'Develop' segments Segments with high growth scope and which Ethiopia is not yet ready to receive and need to prepare for in terms of product variety, quality and services levels. Promotion mainly aimed at attracting and educating foreign tour operators dealing with these segments, creating awareness through travel media exposure and expanding the reach of online marketing channels. Apply around 30% of promotion resources to target and attract these segments over the next five years				
Intrepid explorer Currently limited-sized	Confident 'hard' exploration - looking for the 'real' Ethiopia,	Will have travelled to Sub Saharan Africa before and other 'off the	Cultural and environmental interaction (in its broadest sense). They will be looking for	Influenced by word of mouth, internet and social media.

leisure touring market expected to grow as awareness of unique experiences and routes increases USA, Europe	in search of extraordinary experiences will be prepared to go the extra mile, go to less visited places and sacrifice comforts to do so Largely independent and draws on guide books, internet and local knowledge to plan and execute their travels	beaten' track destinations in Asia and South America. Primarily aged 25-45 Unlikely to have children Length varies – from 14 days to a month or longer Typically travelling as a couple or with a small group of friends Well educated, well read and adventurous Range from budget backpacking to affluent with high disposable income – in both instances travel is a key way of life	community-based experiences and engagement with locals (trying coffee, chat, etc). Quality and nature of hotels, catering, guiding, etc. not a particular priority, prepared to have basic service levels if the experience is right Locations: Prioritise and look for specific out of the ordinary experiences e.g. hiking in the Simiens, going to the Danikel, cycling the Highlands, climbing the highest rock-churches, staying with a local community, exploring the origins of coffee, etc. May touch on main circuit but then also exploring deeper in local community Active segment although not motivated or dominated by special interest, specialised activities	Substantial pre-visit planning via the internet and travel guides like Lonely Planet, Bradt, etc. Significant knowledge of the country of visitation; will know what to expect and have a good understanding of the country's culture and contemporary news / events Tend to self-package and book their own trip and possibly utilising ground handlers / transport operators /guides either in country. May use specialist tour operators to purchase certain activity elements of their journey
Adventure sport enthusiasts A collective segment of small, niche adventurous outdoor sport activity interests From all over based on common interest but more	The appeal is undertaking a specific activity in a new landscape and destination. There is often a significant element of skill and risk involved. It's partly, but not	This is a wide group – the common area is the activity but these, and visitor characteristics, will vary They are likely to undertaken activities in other relatively exotic locations previously but	Key motivation will be the particular activity. A key segment to consider for targeting is marathons/long distance running, cross country/trail running or endurance racing, building on the well established image of Ethiopia delivering world class	Influenced by word of mouth and social media groups (peers will be very important), and wider reading (special interest books / guides / magazines) and documentaries. Substantial pre-visit

likely from USA, Europe	always, about the bragging rights regarding the uniqueness of the experience. Often need advice and support from specialist niche operators or local colleagues/clubs .	not necessarily in sub-Saharan African. Aged 35-45. Group composition could be individuals (booked with a small group), and groups of friends / clubs. Generally well educated Medium to high affluence	long distance runners. High altitude training centres could be developed to attract competitive athletes for training purposes and running events could be staged for cross country running, triathlons, urban running etc. Other niche segments to consider for targeting and expansion include touring cycling, off-road motorcycling, mountain biking, overlanding, climbing, and possibly canoeing or kayaking For some groups this may be the only interest (particularly if there are logistics in terms of transporting equipment). For others sightseeing and culture will be important components – probably as a separate adjunct. Locations: Mostly mountains, rivers and other challenging topographies Like trekkers there may also be a charity and teambuilding component to these trips	planning via the internet, peer advice, and guide books /specialist books. Their pre-visit knowledge of Ethiopia will be moderate to good. Their pre-visit expectations will be mixed. They are likely to be booking some of their trip through very specialist niche tour operators.
MICE (Meetings, Incentives, Conventions	Meet and discuss with global and regional	Professionals and business people	Key motivation is convenience and professionalism or venue	The MICE distribution channel is outlined in

and Exhibitions) delegates See detailed MICE Strategic Recommendations *(Addendum D)* A growth segment in Africa, with major potential for Ethiopia given good air links and intergovernmental presence	peers issues of mutual concern, preferably in a professional and interesting environment with opportunities for local, high quality experiences Need highly professional services, advice and organisational support	May or may not have been to developing countries Range in age from 35-60 Conferences and meetings sizes range from 25 – 5000+, with the majority below 300 delegates Affluent in money terms but poor in time availability	and services. Suitable air and road access and meeting venue, equipment and support services like hotels, transport, meals etc. of key importance. Exotic and interesting location is a key factor once the primary boxes have been ticked Locations: Addis Ababa, smaller regional and local conferences in other cities	*(Addendum D)*, with associations/corporates as clients, working with meeting planners, professional conference organisers, conference centres and other suppliers in the MICE destination
'Leverage' segments Segments with limited growth scope beyond the current levels of visitation, which Ethiopia has traditionally received and is ready to receive. The focus will be on extending the stay into other areas beyond the traditional destinations for these segments and to extract additional expenditure per visitor, through travel trade and online education and information provision. Apply limited (10%-15%) resources to target and attract these segments over the next five years				
Ethiopia diaspora A substantial, mainly Visiting Friends and Relatives (VFR) segment that will visit Ethiopia largely by default and should be made aware of the many travel opportunities on offer	To spend time with friends and relatives, with holiday travel as an add-on to their visit. The majority prefer semi-independent travel with similar needs to the Tailored Explorers - looking for somewhere different but more experienced and want	Strong links with local relatives and friends who know Ethiopia well Aged 30+, often traveling as family groups with children or friends Affluent and less price-conscious 10-14 days, with short leisure breaks of 5-7 days Typically as a small	Unique historical, cultural, environmental, scenic experiences, both key sites but also lesser-known experiences Affordability ranges from budget to high quality and special experiences at hotels, catering, guiding, etc. Locations: Main circuits and all other areas where families or ancestors may have resided Getting heavily involved in the	Influenced mainly by word of mouth through friends and relatives, internet and social media. Significant knowledge of the country; will know what to expect and have a good understanding of the culture and current news / events Tend to self-package and book their own trip and possibly utilising ground

	to delve deeper and veer off the traditional circuit A limited number will invest in special interest travel and 'hard' exploration	group of friends and/or family Well educated, well read and emotionally attached to the destination, wanting in-depth information	culture of Ethiopia – visiting markets, coffee houses etc.	handlers / transport operators /guides in country. May use specialist tour operators to purchase certain activity elements
Birders (See *Addendum E* for a detailed profile) Currently an small but healthy and growing segment and very well suited to Ethiopia From all over with birding as common interest	Specialise in bird watching, have most probably travelled to many environmental and birding destinations. In search of special bird sightings and endemic species Need advice and pre-arranged itineraries based on local knowledge to get the best out of the birding experience	They are likely to undertaken bird-watching trips elsewhere in the world but not necessarily in sub-Saharan African. Aged 45+. Group composition could be individuals (booked with a small group), and /or groups of friends / clubs. Affluent	The appeal is about seeing new endemic species (and other wildlife – but primarily birds) – adding them to the 'list'. The key motivation and activity will be bird (and wildlife) watching. Locations: Simien and Bale Mountains, Awash National park, Lakes of the Rift Valley For some groups this may be the only interest. For others sightseeing and culture will be important components for this group – probably as a separate adjunct.	Influenced by word of mouth and social media (peers will be very important to this group), and wider reading (birding books /guides / magazines) and documentaries. Some pre-visit planning via the internet and guidebooks, peer advice, birding books, etc. Limited to moderate knowledge of the country, with high expectations for birding Likely to book their entire trip through a very specialist niche tour operators. For a club or existing groups, it may be a be-spoke package
Business extension Business travellers	Leisure desires will be across the various segments identified	Economically active, male dominated	The reason for leisure travel will be to experience some of the best elements Ethiopia has	Word-of-mouth through local corporate sector; information through

comprise the largest proportion of arrivals; some could possibly extend their stays for leisure purposes	above	segment. 30-55 years Travel individually or in small groups of 2-4	to offer in a short break of 1-3 days, depending on interest Locations: on main circuit or in close proximity of Addis	Ethiopian Airlines, news coverage, etc. Internet very important Book with local operators

Addendum C: Online Marketing Strategy

Importance of a digital marketing approach for DMOs

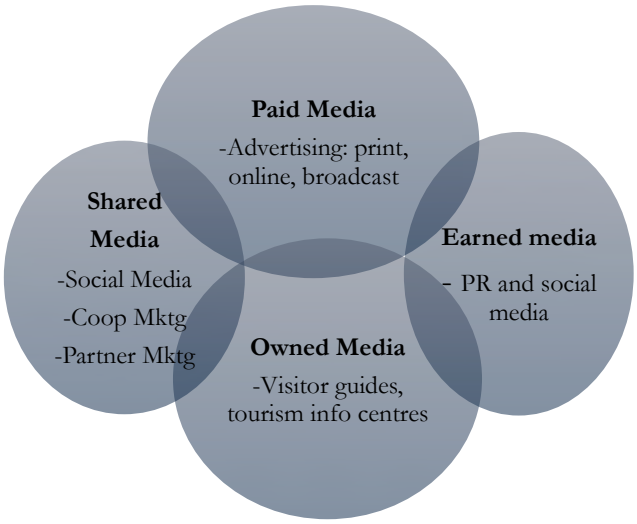
Digital technology has emerged as the epicentre of the tourism experience[25] driving Destination Marketing Organisations (DMOs) to integrate their online and offline marketing activities to reach increasingly digital-savvy consumers.

According to the Destination Marketing Association International (DMAI), DMOs are increasingly making significant investments in digital marketing, integrating their online activities, especially social media, into their overall marketing efforts. Banner ads and search engine marketing dominate the online spending landscape, and almost all DMOs which participated in the organisation's *2012 DMO Marketing Activities Study*[26] said they were present on Facebook, Twitter and YouTube.

This is in response to the growing consumer trend towards travel decision-making based on online information.[27] The rise of the Smart Consumer – digital natives and Internet experts – who are increasingly empowered to build personalised travel packages and expect to get and share information while travelling.

These travellers consider themselves explorers, not tourists, and seek authentic and unique experiences such as those offered naturally by a destination like Ethiopia. They are hyper-connected, demand constant engagement and expect interaction, on a level that can only be delivered online.

Figure C1: Integrated Marketing Approach



Source: Destination Marketing Association International

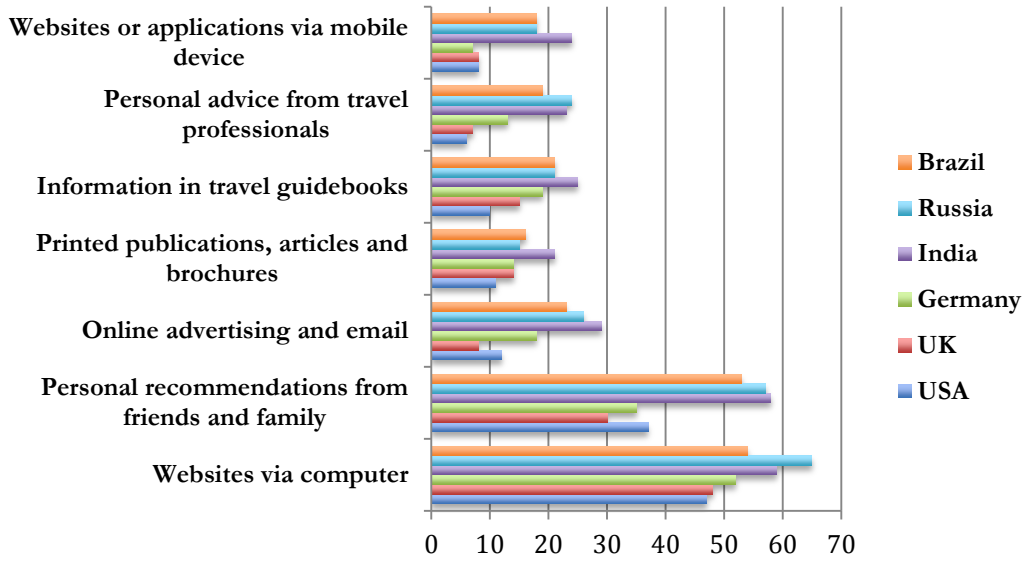
[25] Modiano (2012) The destination marketing landscape: the role of DMOs
[26] Modiano (2012) The destination marketing landscape: the role of DMOs
[27] Psarros (2013) Integrated destination marketing and the future DMO

Today's DMOs are in the inspiration business and their priorities need to be on meeting the traveller's needs in the right place with the right content at the right time. Unlike with traditional DMO marketing, the new traveller expects a complete, an integrated marketing experience, including earned media, web, PR, trade, traditional and online marketing. This requires DMOs to focus on the whole experience, but pay particular attention to customer satisfaction and engagement.

Importance of developing a strong digital strategy for Ethiopian Tourism Organisation (ETO)

In an online world where traditional and digital media converge and customers are constantly bombarded with an extensive array of marketing information, Ethiopia has to stand out from the crowd and grab attention by building relationships and engaging with travellers in the new spaces they are playing in, including mobile, social and online.

Graph C2: Information Sources of Decision to Visit the Destination



Source: PhoCusWright[28]

ETO has to think of integrated marketing opportunities, seeking the "optimal match" of messages with channels, platforms and devices (UNWTO 2014). ETO has to be where the consumer is, instead of trying to convince the consumer to come to it. The organisation has to leverage the conversations of others, instead of trying to exert control over them.

Special focus must be given to shared media and earned media, including User Generated Content, information contributed by individual users of a website or online platform, not the owner of that online platform.

To differentiate itself and grab attention, ETO needs a strong digital and content marketing strategy - with a reliable, dynamic website as its hub and the skills and resources to execute it.

Steps to creating the digital marketing strategy will include:

[28] PhoCusWright (2012) Empowering Inspiration: The Future of Travel Search

- **Formulating your message:** What do I want to tell my source markets? Develop themes in line with the brand story you're trying to tell, e.g. Ethiopia is where it all began…
- **Choosing the right platform:** Which digital platforms are my source markets using? Once you have decided on these, deliver your story themes – Ethiopia is where it all began – across multiple channels. Develop conversations and engagement.
- **How will I engage with them:** Create a content calendar that shows your marketing efforts across the channels you have identified and be consistent in its application. Your content calendar could include photos, videos, blog posts, social media posts, user-generated content and articles
- **What goals am I hoping to achieve**: Assess your digital marketing goals, e.g. engagement, and measure them regularly, tweaking your activities to achieve success

Among the benefits of digital marketing is its highly measurable nature ensuring that ETO can measure its success and make changes to its marketing as and when required. The implementation of this online strategy must focus on three key evaluation areas:

- **Awareness:** Site visits, time spent, pages viewed, search keywords, click through rates and bounce rates
- **Actions:** Brochures taken, newsletter sign-ups, product search, video views, gallery views and downloads
- **Advocacy:** Expressing opinions, comments and posts, content sharing and posting on other sites

Digital marketing strategy for ETO

Goals of digital marketing for Ethiopia

Among those goals pursued by ETO in its online marketing strategy are:

- Raising awareness of Ethiopia and its regions' unique and diverse heritage and cultural assets, its striking landscapes and welcoming people.
- Significantly grow ETO and its regions' online community in target markets.
- Increase the amount of and disseminate accurate, inspiring and engaging content about Ethiopia and its regions to inspire target markets to travel to the destination.
- Unite trade partners in one integrated, focused marketing effort to grow awareness about the destination, its brand and travel opportunities.
- Foster, leverage and share the pride that Ethiopians have for their homeland.
- Capture and promote diverse aspects of the destination in a cost-effective manner.
- Reach online travel markets normally not reachable through traditional marketing efforts, putting the traveller at the heart of all online marketing decisions.

Components of an integrated digital marketing strategy

Components of this integrated digital marketing strategy for ETO should include, but not be limited to:

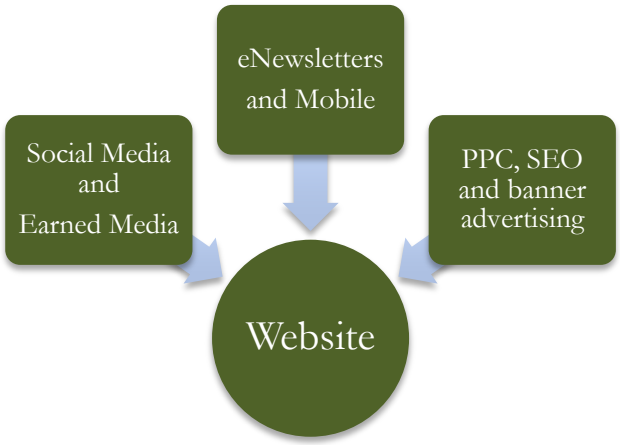
- A strong set of national and regional tourism websites employing best-practice DMO web techniques as outlined below with dynamic content offered in several languages.
- A strong focus on generating dynamic, engaging, informative and reliable content – visual and text for use across ETO's online platforms.
- An updated and maintained trade and consumer database in key source markets.
- A B2B website section including a brand toolkit, trends and statistics, content that can be used for ETO's marketing initiatives, and online destination training in the form of a destination specialist programme.
- An online PR and media plan including updated media database – consumer, trade and travel bloggers – in key source markets.
- Joint online marketing arrangements encouraging key trade partners to 'share' Ethiopia content and market Ethiopia and its regions in a coordinated manner.
- Social media platforms whose design and consistently updated content reflect the brand, destination goals and traveller's needs.
- Affiliate partnerships with national influencers and international online influencers.

Digital focal point: Ethiopia national and regional tourism websites

With many of Ethiopia's strategic markets relying heavily on online information for travel decision making, ETO must launch national and regional websites that reflect the new brand's visual identity and include best-practice functionality and dynamic, accurate, updated visual and written content that inspires and engages prospective travellers.

The national and regional tourism websites are the focal point to which all online marketing activities, PR, email marketing and social media should be directed and should provide quality dynamic information that can be repurposed and disseminated across a full range of the promotional mix.

Figure C3: Websites as a content hub for digital marketing efforts to direct traffic to



Content creation for ETO's online platforms

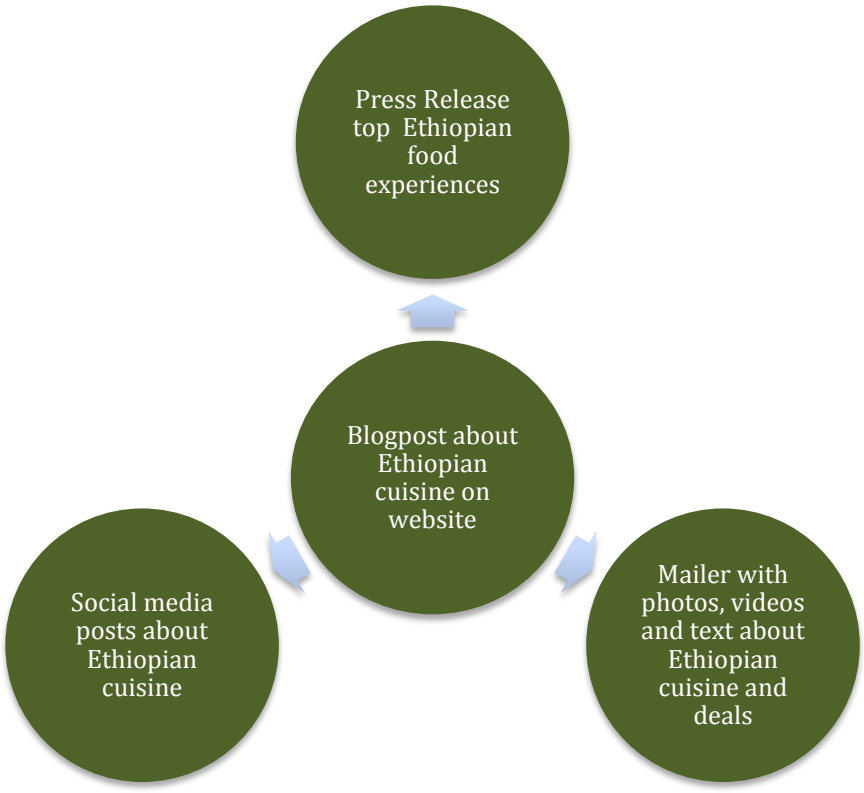
According to UNWTO (2014), online marketing is very much about the marketing of content, i.e. "getting the right content in front of the right person at the right time on the right device at the right point in their decision-making process to drive the right action".

In online marketing, content is king, but visuals reign[29], especially in travel marketing where photos and videos on a website truly sell a destination. This is since most journey planners will visit multiple websites and refer to user reviews to plot their trip. In a destination like Ethiopia, which has so much to showcase visually, the destination's exotic and inspirational appeal would be effectively captured through photos and videos. Creating a visual imprint cuts through the clutter[30].

The content generated across all platforms should have the interests of the traveller at heart and promote the destination and its assets, not fulfill the corporate communications mandate of ETO. Content development should reinforce Ethiopia's brand.

Significant resource shortages require ETO to think strategically about the type of content to create and how this content can be repurposed in multiple formats for use across its digital platforms, i.e. create once, use multiple times in different formats across a variety of digital marketing platforms.

Figure C4: Repurposing content across the promotional mix



[29] Skift (2015) Travel brands look to Instagram for the influencer bump
[30] AMC (2015) Cape's tourism marketing bonanza

Online Marketing Platforms

Online marketing tools that ETO should leverage to showcase its brand identity in an integrated manner include:

- **Blog:** Assists with SEO and provides a hub for dynamic content such as Top 10 destination picks, travel advice, etc. that can be repurposed for other digital platforms.
- **Facebook and Google+:** Tools for building relationships with destination ambassadors and extremely targeted advertising to prospective fans.
- **Twitter:** Quick and comprehensive. Good to get the message out speedily and for hearing what people are saying about the destination brand. Hash tag campaigns that are well planned and executed can be a powerful means of driving brand awareness.
- **Pinterest and Instagram:** Images drive travel decisions. DMOs have successfully used # Instagram visual campaigns to generate interest in their destinations.
- **YouTube:** The second most-used search engine in the world and an especially good platform to promote travel through the powerful media of video.
- **Foursquare and Facebook Places:** Leverage the trend of *smoasting* (a term describing the tendency to boast on social media) with user check-ins on Foursquare and Facebook Places and rewarding visitors for checking in with a brief suggestion of something to see.
- **Remarketing and PPC:** Use remarketing to show your ads to users who have previously visited the website as they browse the Web. This is an extremely powerful form of banner advertising because it is a very targeted form of marketing. PPC for its part is far quicker than SEO in its ability to direct Google searchers to your website, but it can be expensive especially if your keywords are very competitive.
- **SEO:** Mastering SEO is a long-term and ongoing strategy, but success is the placement of your website at the top of Google's search results, an enviable position to be in and as a DMO that's where your website should be for destination searches.
- **eNewsletters:** Still an important component of the promotional mix allowing ETO to remind visitors of the destination and build loyalty through latest Ethiopia information, events and offers and drive traffic to the website.
- **Mobile:** Offers direct communication regarding tourism information, ideally with the provision of an app or mobisite providing useful information on the destination while they are travelling, including an offline map, travel information, currency converter, Wi-Fi spots, weather, etc., but also through provision of 24/7 emergency tourism number delivered through text on arrival.

ETO should select and focus on those digital platforms most likely to reach its target source markets and segments instead of trying to focus on all. Less successful DMOs have a tendency to launch across all platforms and fail to keep them updated with useful, informative and inspirational content, which in turn detracts from their brand image. Not only will these platforms need to be populated consistently taking in to account the destination's brand identity, there will have to be constant engagement and measurement to ascertain their success.

Influencers and user-generated content

Successful digital marketing-focused DMOs such as Tourism Australia and South African Tourism are increasingly leveraging the power of user-generated content across their digital platforms. In

the case of South African Tourism, the DMO's social media platforms and in fact the official website acts as a showcase for content tagged #meetsouthafrica, generated by visitors to the destination and influencers such as prestigious travel bloggers who enjoy large and loyal audiences.

Like these leading DMOs, ETO must embrace tools to monitor the chatter across all key platforms on which their respective source markets can be found, engage with these digital ambassadors, and leverage Ethiopia tourism content on their own platforms.

As indicated in the situation analysis, Ethiopia already enjoys a great deal of user-generated content created by tourism fans who post positive content about Ethiopia across all major social media platforms despite the poor Internet infrastructure. ETO should leverage these existing conversations instead of trying to create them, and this includes working closely with travel bloggers within the destination and from key source markets who have strong networks of prospective travellers that could be targeted to visit the destinations.

ETO should place emphasis on authentic storytelling and act as an initiator, facilitator, and guide in online conversations, as opposed to driving them. It acknowledges that nobody is interested in what a DMO says about a destination but when a DMO creates a platform for stories by local people, top bloggers and travellers, visitors are enticed to experience the destination for themselves[31].

To keep abreast of international DMO trends and leverage learnings made by other DMOs in the area of destination marketing, it is suggested that ETO joins a tourism association like Destination Marketing Association International (DMAI).

Phased Approach: Digital marketing strategy

Phase One: The Building Blocks

a) Create excellent national and regional websites as digital focal points for destination marketing

Ethiopian Tourism Organization is encouraged to discard its dysfunctional tourism website and those of each Ethiopian region and create entirely new national and regional destination websites incorporating global best-practice functionality and well-written, informative, reliable content.

While regional brands must be distinctive, national and regional brands should share brand architecture, reflecting at least some of the national 'umbrella' brand values and bear some resemblance to the parent national brand[32]. The same can be said for the structure and style of both the national and regional websites.

The destination websites of Ethiopia's tourism regions should be standardised from a functionality and visual standpoint so that they 'fit' within the overall national tourism brand. These websites need to resemble in some way the national website's look and feel, but also take in to account each region's idiosyncrasies.

Critical success factors for Ethiopia's national and regional tourism websites include:

[31] Govender, I (2015) Travel Bloggers who take you places
[32] UNWTO (Date Unknown) Handbook on Tourism Destination Branding

- Easy navigation and logical structure

An analysis of Ethiopia's national and regional tourism websites in the table below indicates that these include very few of the critical success factors defined above as essential for DMO websites.

Table C1. National and regional tourism websites' current functionality in relation to best practice requirements for destination website.

	Ethiopia	Tigrai	Amhara	Oromia	Addis Ababa	Southern nations
Logical Navigation	x	√	x	√	x	x
Brand recognition	x	x	x	x	x	x
Reliable, well-written content	x	x	x	x	x	x
Tourism news and advice	x	x	x	x	x	x
Maps and itineraries	x	√	x	x	x	x
Product Database	x	x	x	x	x	x
Email newsletter sign-up	x	x	x	x	x	x
High-Quality multimedia	x	x	x	x	x	x
User-generated content	x	x	x	x	x	x
Trade section	x	Not functional	x	x	x	x
Interactivity	x	x	x	x	x	x
Multiple languages	x	x	x	√	x	x
Social media, incl. Blog	x	x	x	√	x	x
Working links	x	x	x	√	x	x
SEO	x	x	x	x	x	x
Google analytics	x	x	x	x	x	x
Mobile responsiveness	x	x	x	x	x	x
Customisation	x	x	x	x	x	x
Bookability	x	x	x	x	x	x
Promote destination, not DMO	√	√	x	√	x	x

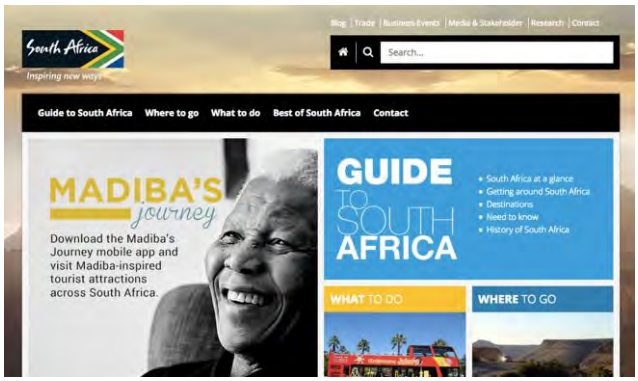
It is recommended that in the development phase of the national and regional Ethiopia tourism websites the critical success factors that have been defined as best practice are incorporated so that Ethiopia's online hub is competitive with competitor DMO websites and emerges strongly within the cluttered online tourism marketing space.

DMO websites must act as the hub to which all many marketing activities and online conversations, not only those conducted by ETO, but also by stakeholders and travellers, are directed. As such it is essential that ETO's national website and the regional tourism websites incorporate best-practice DMO functionality to encourage and leverage these conversations.

Text Box C1: Aligning national vs regional brand websites

Brand South Africa has very strong guidelines linking the national South Africa brand to that of the country's provinces that Ethiopia could draw upon for inspiration. According to Brand South Africa, the province takes strategic direction from the primary brand when communicating with an international audience.

Not all of South Africa's provinces have extended this to their tourism websites, but provinces such as Limpopo Tourism, Eastern Cape and Tourism KwaZulu Natal have aligned their websites with that of South African Tourism's website in terms of style, look and feel, and logo, providing some level of consistency across the digital platforms promoting the destination and ease of use for tourists seeking information about Ethiopia and its regions.



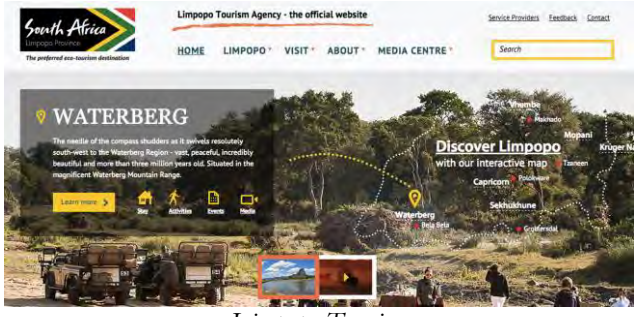
South African Tourism

⇓



Tourism KwaZulu Natal

⇓



Limpopo Tourism

b) Create and populate national social media accounts

The situation analysis section of this study outlines the key source markets within Europe (UK, Germany, Italy, The Netherlands and France) and Middle East. Large volume markets such as the USA, India and China have limited penetration although the USA remains the largest single market and should not be ignored in the first phase of the digital marketing strategy.

With the practicality of the limited and untrained resources available to employ this digital marketing strategy, it is proposed in this first phase to limit the creation and population of social media accounts to national accounts and delay creating digital accounts for Ethiopia's regions until the national brand can be established online. Social media platforms where these source markets are typically engaging include, but are not limited to:

- **YouTube:** Recommended to showcase Ethiopia's impressive landscapes, culture and heritage.
- **Twitter:** Recommended by virtue of its ability to leverage the existing conversations taking place by destination fans and the potential for hashtag campaigns and marketing.
- **Facebook:** Recommended due to its popularity within Ethiopia's key source markets.
- **Instagram:** Recommended to showcase Ethiopia's impressive landscapes, culture and heritage, as well as its potential for hashtag campaigns and marketing.
- **Google+:** Recommended for its influence on SEO
- **FlickR:** Not a priority in this first phase
- **Pinterest:** Not a priority in this first phase
- **LinkedIn:** Not a priority in this first phase
- **Tumblr:** Not a priority in this first phase

Critical success factors for Ethiopia's national digital marketing platforms include:

- Establish a long-term vision, as social media marketing is never a once-off.
- All activity on all digital marketing platforms should be connected to the overall goals of the digital marketing strategy.
- Define a social media roadmap that links the digital marketing goals to specific social media initiatives throughout the three-year period.
- Establish governance and guidelines. Who will be responsible for maintaining social media activities and what are the guidelines in which this must be conducted? What training and capacitation is required?
- Authentic, honest storytelling about the destination, whether this content is generated by ETO, influencers, locals or visiting tourists should be a priority.
- Social media platforms should be updated and monitored regularly, and engagement by fans leveraged.
- ETO should not try to invent or control the conversation. Rather a more successful approach lies in joining an existing conversation.
- Employ an integrated, holistic approach to social media so that it is incorporated within and contributes to your marketing strategy instead of being a separate silo.
- Secure trade and stakeholder support for and understanding about your social media initiatives.

c) Create and grow a digital database for email marketing

Tourism demands the fostering of relationships with visitors through personal and professional dialogue. Permission-based email marketing, because of its direct, flexible and personalised nature, is the most relevant and effective channel through which to foster these relationships, appealing especially to visitors who may already be searching for options[33].

Having opted in to receive information, visitors are more likely to be responsive to a destination's email marketing messages. However, with the vast multitudes of destinations all competing for a slice of the market, it is essential that ETO optimise its email marketing messages to stand out from the crowd.

As such, not only should the new website include newsletter sign-up functionality, website visitors should be give the option to select specific interests as part of the signup process to ensure that the email marketing message sent to them are optimised for their interests, which is a great deal more powerful than sending generic newsletters.

There are several open-source CRM solutions that are free or cost-effective, and that can be adapted for the purposes of the ETO. The most popular and flexible open-source platform is Sugar CRM (www.sugarcrm.com) which can be tailored and built upon to create a robust CRM system for destination marketing purposes.

Other CRM providers include:

- FreeCRM (https://www.freecrm.com/) which offers a free account for up to 100 users and 100 000 contacts. This CRM has one of the highest limits of free users and contacts than other free CRM solutions in the market.
- Hubspot CRM (http://www.hubspot.com/crm**)** was built by marketers specifically for marketing purposes. The system may not be robust enough for the purposes of ETO, but its associated Salesforce CRM (which comes with charges) is more robust with deep levels of CRM functionality.
- Simpleview (http://www.simpleviewinc.com/) is designed for use by DMOs.

The critical components for selecting a DMO CRM include:

- A simple interface
- Intuitive process that don't require extensive training
- Cloud based access
- Report building
- Advanced searchers
- Segmentation and profiling capability
- Opt-in data protection

Initiatives should be employed throughout the three-year period to grow the database.

Critical success factors for ETO's email marketing includes:

- Segmented database so that targeted content can be delivered according to a subscriber's specific interests regularly.

[33] Digital Fire (2010) The importance of email marketing in the tourism industry

- Visible, functional newsletter signup form on destination website and social media platforms.
- Encourage current email subscribers to forward emails by including social sharing buttons and "Email to a friend" button.
- Run promotions in conjunction with affiliates such as Ethiopian Airlines to encourage additional newsletter signups.
- Run online competitions through the national tourism website and across social media platforms to increase signups.
- Incorporate incentives or offers: Benefits that the recipient gains from clicking on the hyperlink in the email.
- Optimise timing of sends: Measure opening of newsletters to devise optimal day, time of sends for future campaigns.
- Integrate email campaigns within your overall marketing strategy. Should not exist in a separate silo.
- Measurability ensures that the creative, content, call to action can be optimised to hit ETO markets' sweetspot.
- Optimise landing pages: Ensure that upon clicking a link the user reaches a functional page that meets any expectations they may have had when clicking that link.

d) Content Drive to devise brand-appropriate content for all platforms – websites and social media

To feed its online focal points – the official national ETO website and the regional tourism websites – as well as ETO's various digital promotional platforms such as Facebook, YouTube and Twitter, ETO needs to incorporate content development within its digital marketing strategy to generate well-written, informative, engaging content that will inspire its online communities to visit and engage with its website.

ETO should not, however, be regarded as the sole provider of content. Content generated by its trade partners, national influencers, locals and visiting business and leisure tourists should be leveraged across ETO's national and regional online platforms.

ETO's content drive should incorporate themes around the brand identity, i.e. content development that showcases Ethiopia as the source, the origin, the place where it all began. A regularly updated content calendar will need to be created and maintained throughout the strategy reflecting the brand's identity.

In addition to using the content developed in the content drive for its own purposes, ETO should find partners and engage in the conversations to leverage their networks. With the launch of new national and regional tourism websites, there is an opportunity to generate informative content that should be used to populate the new website and also be repurposed for use across the promotional mix, not only by ETO but by all parties involved in the promotion of Ethiopia.

A dedicated content manager or editor should be responsible for the consistent production, repurposing and dissemination of content that promotes the destination once the initial content drive is complete. Capacitation within ETO's marketing department will be required as well as assistance with the development of a content marketing drive and content production – images, video and text.

Critical success factors for Ethiopia's content drive includes:

- Identify content themes that strongly reflect the destination's brand
- Create once, repurpose in multiple formats and reuse across digital platforms
- Leverage the content being created by other parties, e.g. user-generated content
- Involve trade partners and other stakeholders in the creation of content
- Content creation should be focused on meeting ETO's marketing strategy to inform and engage with visitors, and not to fulfil ETO's corporate communications mandate.
- A content calendar should be created and updated to guide content development

e) Capacitation building of all stakeholders involved in digital marketing for Destination Ethiopia

With digital marketing emerging as a key marketing focus for ETO, dedicated trained staff will be required to devise and implement ETO's activities.

It is recommended during the first phase of the digital marketing strategy, and to maintain world-class quality across all spheres of online marketing, that elements of implementing the online marketing strategy be outsourced to an external consultancy or consultancies. This may be expanded to the second phase if specialist online marketing input and expertise are required, e.g. SEO content, online marketing campaigns. Translations of content should be undertaken exclusively by first language speakers of ETO's key source markets throughout all phases.

The first phase of the digital marketing strategy also proposes capacitation for ETO's Marketing Department and key regional tourism officials to fulfill the new roles and responsibilities required to implement the digital marketing requirements. This capacity building should take the form of theoretical training from international experts and practical on-the-job application through the implementation of various activities outlined in this strategy.

To ensure clearly defined roles and responsibilities across these institutions, it is imperative that proper, detailed job descriptions including Key Performance Indicators (KPIs) and comprehensive and regular reporting against these objectives are completed.

Examples of KPIs in this new environment include:

- Digital Marketing ROI
- Site traffic
- Social Media reach
- Organic search
- Brand engagement
- Influence response
- Mobile leads, traffic and conversion rates
- Campaign exposure and evaluation
- Destination awareness, image and preference

The ETO digital marketing staff will require strong digital and content marketing skills and capacity. Among those skills requirements will be:

- Creation and execution of digital marketing plans and budgets;
- Monitor and report on marketing challenges and successes;
- Analysis of tourism statistics and trend reports to direct digital marketing activities;
- Build and maintain productive relationships with private sector tourism stakeholders and associated public-sector partners;
- Ensure the ETO brand is woven into all digital communications to create brand awareness, brand loyalty and preference to Ethiopia;
- Excellent project management skills;
- Coordination of joint trade digital marketing activities;
- Understanding of the promotional mix and integrated marketing campaigns;
- Understanding of social media, online and content marketing and user-generated content;
- Excellent written and spoken English;
- An understanding of source markets and target segments.

f) Free Wi-Fi provision in key tourist areas

The low Internet penetration throughout Ethiopia, especially in rural areas, means that any social media strategy that includes an element of User-Generated Content will be difficult to implement without providing Wi-Fi, and preferably free Wi-Fi, access in key tourist areas where Ethiopia and its regions wish to encourage tourists to share content about their experiences with their networks.

The strategy suggests the roll out of Wi-Fi hotspots in Ethiopia's main tourism areas or to improve the cost and accessibility of local SIM cards and data packages not only upon their arrival at ports of entry, but also in key tourist areas. Several cities throughout the world have recognised the importance of Wi-Fi provision and have converted telephone booths in to Wi-Fi hotspots for example. Ethiopia and its regions have the opportunity to leapfrog landline technology and provide Internet through mobile phone technology.

Furthermore, hotels and restaurants should receive subsidies for Wi-Fi provision to their guests. Ideally this should be free access and can be capped at a certain amount if resources are limited.

Phase Two: Engagement and Promotion

a) Trade partnerships in Ethiopia's digital destination marketing

To ensure the success of ETO's digital marketing strategy it is essential that key trade stakeholders are guided on how, and in fact encouraged, to use the new Ethiopia Tourism brand in their own digital marketing initiatives and customer interactions.

If tourism stakeholders can market the destination using a united, coordinated approach, this presents Ethiopia with a competitive advantage, as the businesses are working together to achieve a

common goal.[34]

Ethiopia must build and leverage trade relationships, locally and internationally, and invest seriously in this distribution channel to achieve coordinated digital marketing and enhanced awareness in key markets.

Critical success factors for the development of trade partnerships in Ethiopia's digital destination marketing include:

- An updated and maintained trade database in key source markets;
- A B2B website section on both the national and regional websites including a brand toolkit, trends and statistics, content that can be used for their own Ethiopia marketing initiatives, regular newsletters with updated destination news and an online destination training workshop, and
- Joint marketing arrangements encouraging key trade partners to 'share' Ethiopia content across their digital marketing platforms and market Ethiopia in a coordinated manner.

b) Mobile app technology to promote the destination

According to Triptale[35], tourists travel less prepared than ever with shorter notice periods. Their discovery, planning and booking has increasingly moved to mobile ensuring that among the DMO's greatest roles today, is to provide Internet. It must be possible to share anytime, anywhere.

Mobile is an effective way of creating destination fans, with some 52% using destination apps while visiting a destination. Among these visitors, 94% use mobile apps to research things to do and 80% for maps and directions.

The almost-universal use of mobile technology by visitors from Ethiopia's key source markets requires the provision of a free mobile app through which visitors can access key destination and tourism product information for Ethiopia.

Critical success factors for the development of a mobile destination app:

- Keep it simple, easy and most of all, free!
- Be contextual and relevant: Offering relevant content in the context of user's search is the key to make your app popular and interesting.
- Ensure it works across all operating systems
- Add value and information frequently
- Provide easy sharing capability
- Publicise its availability widely
- Clear and instant call to action
- Engaging user experiences
- Attractive design

c) Domestic digital destination marketing campaign

[34] Buhalis (2000) Marketing the competitive destination of the future
[35] Thygesen (2014) Mobile trends: how they influence travel and tourism

With its intensely proud nation and world-renowned ambassadors, especially in the realm of sports, an opportunity exists for Ethiopia to harness this pride through digital marketing initiatives and foster a spirit of wanting to share the uniqueness of the destination with all visitors.

Internet penetration is low (second-lowest in Africa[36]) however, and the largely rural make-up of the Ethiopian population ensures that any domestic tourism marketing strategy will have only limited success in the destination during the three-year strategy.

That said, however, there are several very successful private-sector social media accounts with an engaged Ethiopian audience that can be leveraged, such as church group Facebook accounts for example. There is also a fair amount of existing engagement on such online platforms as Twitter and Instagram by Ethiopian citizens and influencers who can be encouraged to participate in a digital domestic tourism campaign.

The hashtags #ExploreEthiopia and #VisitEthiopia are already prolifically used on both platforms by locals and international visitors and as per best-practice it makes sense to leverage these in any digital tourism campaign embarked on by ETO.

Due to the limited access to Internet among the domestic population, the strategy proposes that the focus be on an international digital marketing strategy with elements that can be extended to domestic tourism promotion, i.e. encouraging user-generated content about Ethiopia's tourism assets across social media platforms tagged #ExploreEthiopia.

To foster national pride and create awareness about the destination's tourism opportunities, locals, local travel trade and local celebrities must be encouraged to share their Ethiopia experiences related to *Ethiopia's* tourism assets (see below international campaign) through their social media accounts using the #EncountertheOrigin hashtag.

ETO's role will be to engage with and leverage this local content across its own digital marketing platforms, as well as translate this into their traditional marketing, e.g. roadside billboards showcasing user-generated content; radio campaigns outlining locals' experience of the destination.

Digital initiatives to foster domestic tourism growth should not be regarded as separate to other forms of traditional domestic tourism promotion. Rather they should be used to further enhance traditional initiatives to grow local travel.

d) International digital destination marketing campaign

In the second phase of the three-year digital marketing strategy, ETO will employ an international digital destination marketing campaign entitled *Encounter*, aimed at creating awareness about, and encouraging travel to Ethiopia's tourism assets that embody the brand identity of '*the source*', e.g. the source of the Nile.

The assets will be linked to create an official tourism route that will be promoted as a 'bucket-list' itinerary for explorers of Ethiopia and trade partners will be engaged to assist in the packaging and promotion thereof.

The international digital marketing campaign will incorporate, but not be limited to:

[36] Wikipedia (2015) Internet in Ethiopia http://bit.ly/1G77Vmb

- A special *Encounter* landing page on the ETO's national and regional website detailing the route, trade partners involved, key facts, multimedia, blog posts, user-generated content, etc.
- The hashtag #*ExploreEthiopia* will be employed to tag all content generated by influencers, travel bloggers, locals and visitors. This content will be leveraged by ETO across its social media networks and on its destination websites.
- Travel Bloggers will be enlisted in Phase 3 of the digital marketing strategy to experience and blog about *Encounters*. The content and social media interest they generate will be leveraged across ETO's networks.
- Special travel packages for the route will be devised and promoted by key trade partners.
- ETO will initiate sharing opportunities at these key assets: Props that prompt visitors to take photos and share, i.e. I discovered the origin of the Nile #ExploreEthiopia. These physical sharing areas must have WiFi hotspot access. ETO will incorporate these posts within its website and across its social media platforms.
- At launch: The creation of a Facebook App or Game and Competition to create awareness about the route in the format of a treasure hunt. To enter, the user has to sign up to receive Ethiopia Tourism correspondence in future and complete the *Encounters* treasure hunt. The winner will win a trip with a partner to experience Ethiopia.
- At launch: Content marketing, email marketing and social media campaign will be employed for the launch of the route across all relevant social media platforms, and all traditional forms of marketing employed by ETO will feature the campaign. Trade partners will be given collateral to share with their networks.
- At launch: Globally renowned influencers will be identified to experience *Encounters* and share it with their respective networks. Their experiences will be incorporated within ETO's social media platforms and the national tourism website.
- The campaign will be developed and implemented within the period of a year.

Phase Three: Leveraging Affiliates

a) Creating affiliate partnerships with influencers

South African Tourism targets the decision-making process of planning a trip, providing useful visitor information and partnering with fulfilment partners like online travel agencies, e.g. Expedia who have an existing, loyal customer base.

There is an opportunity for ETO to learn from this approach and engage potential travellers in the spaces they make travel decisions, customising their information and advertising to increase the relevance of their message and making it more attractive and easier to book a trip online to Ethiopia.

The third phase of the digital marketing strategy advocates the partnering with online travel players like TripAdvisor, WAYN.com and Expedia, and supplementing Ethiopia's digital marketing through Google Adwords, Lastminute.com, YouTube, Opodo, E-Bookers, CNN and NatGeo.

b) Online PR incorporating Travel Bloggers

According to global research firm, Nielsen, over 90% of global consumers trust peer recommendations over advertising[37]. DMOs are leveraging this trend, employing influential travel bloggers to "recommend" their destinations to their considerably hard-earned networks.

The authentic stories about Ethiopia generated by locals and international visitors to the destination should be supplemented in the third phase of ETO's digital marketing strategy by an official Travel Bloggers strategy where influential bloggers with strong networks in key source markets are invited and commissioned to experience *Encounters*, blog about it and share it with their respective networks.

The real experiences offered on *Encounters* provide travel bloggers with the authentic storytelling their networks have come to expect. These travel bloggers will share in an unbiased, intimate, personalised, believable and inspiring way their first-hand experience of the tourism assets along *Encounters*, as well as Ethiopia's many other non-physical tourist assets such as the warmth and generosity of its people, the magical myths and legends and destination's authenticity.

The quality shareable content they generate will be leveraged across social media platforms, not only by their networks, but also by ETO on a special *Encounters* landing page featured within the national tourism website.

The use of Travel Bloggers is only one of the components supporting ETO's international destination marketing campaign entitled *Encounters* (as outlined above).

[37] Nielsen (2012) Global consumers' trust in 'earned' advertising grows in importance http://bit.ly/1fyoMzu

Addendum D: MICE Strategy

International research studies confirm that there are substantial and measureable economic benefits to be derived from a destination that attracts and hosts in-country business tourism events; a tourism pillar referred to internationally as the MICE (Meetings, Incentives, Conferences and Exhibitions) sector.

The economic value of the business travel sector is vast and growing. According to UNWTO, there has been a 53% improvement in international business travel over the past 10 years exceeding the overall (leisure) tourism growth rate of approximately 3.3% per annum. The sector is expected to grow by 4% in 2015 to US$ 1,222.3bn.

The conference and incentive travel segments are predicted to continue growing at a faster rate than any other tourism sector up to 2020 when revenues from international business tourism are forecasted to account for up to 45% of total international tourism income.

The MICE sector is consequently a powerful economic stimulator and has a far reaching economic multiplier effect. It is also a labour intensive industry that creates jobs; it is a significant earner of foreign exchange, generates substantial tax revenues for governments and stimulates small and medium enterprise development.

Research of international arrivals by purpose of visit indicates that Ethiopia's conference arrivals have risen by almost 60% over the past 5 years (2009 to 2013).

	2009	2010	2011	2012	2013
Business	71,374	77,816	91,064	130,329	123,600
Meetings, congresses	47,516	36,145	50,531	57,578	64,970
Total	118,890	113,961	141,595	187,907	188,570

Principal Characteristics of the MICE Sector

This sector has very different drivers compared to that of the leisure sector. The principal characteristics are:

- Promotes investment, trade, communications and technology
- Promotes other business sectors
- Resilient to economic downturns
- Promotes environmental quality and sustainability
- Brings education and professional development to the local community
- At the high quality, high yield end of the tourism spectrum
- Year round – thus sustaining permanent, full-time employment
- Complementary to the leisure tourism sector – relying on much of the same infrastructure

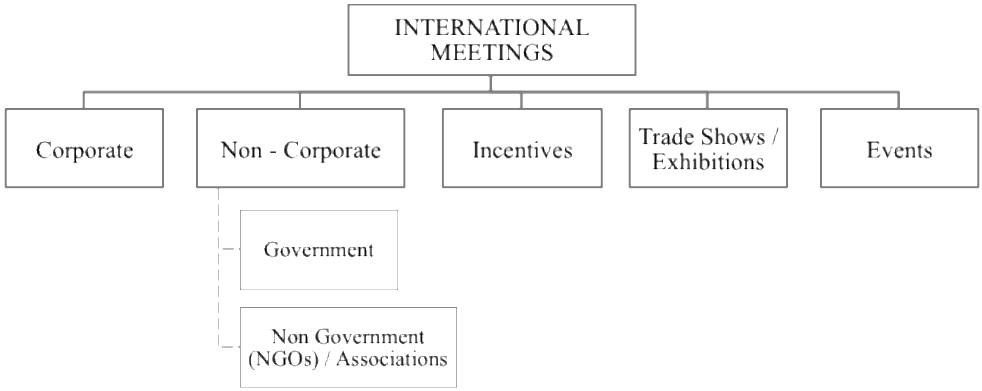
Investment in business tourism facilities leads to the regeneration of urban / inner-city areas. It helps stimulate future inward investment. Research demonstrates that

- 40% of delegates return with families as leisure tourists
- 19% of international delegates bring an accompanying person to a conference

MICE Value Chain

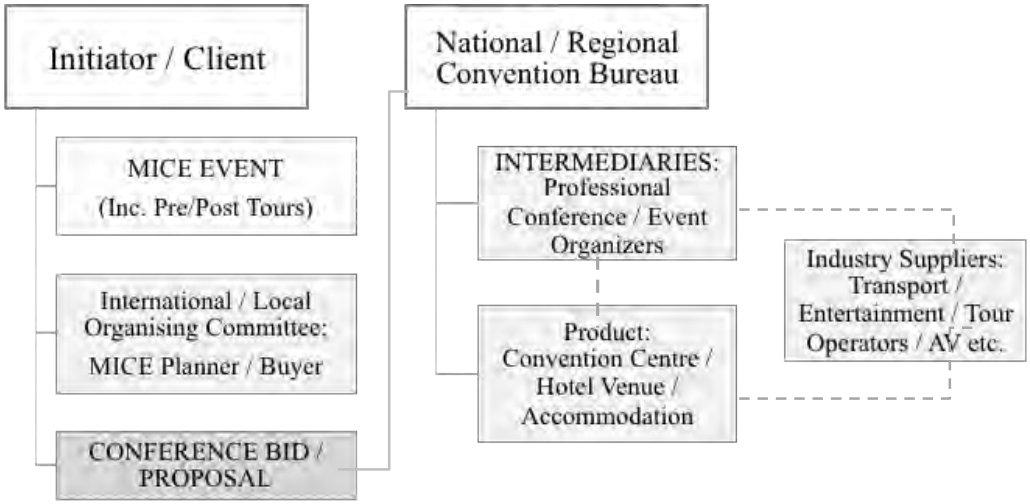
The value chain associated with the MICE sector is referenced below.

The main criterion to segment the business tourism / MICE market is via the initiator of the meeting. The initiator determines what kind of meeting is organised and in turn what supplier services are needed. When segmenting the international meetings market by initiator, two primary segments namely the corporate and non-corporate meetings markets can be defined:



Corporate	National, regional and international private sector corporations that generate meetings and incentive travel programmes
Non-Corporate	i. Governmental meetings ii. Non-Governmental meetings i.e. Associations (medical meetings, academic, trade organisations, professional bodies)
Incentives	A reward programme for corporate sales achievers – usually travel based.
Trade Shows / Exhibitions	A business-to-business platform at which (international) buyers interact with local suppliers (example the MICE East Africa trade show to be hosted in Addis for the first time in early 2016 will bring in hosted meeting buyers to meet with product suppliers i.e. venues and hotels)
Events	A large gathering of culture, arts or sports participants that can attract international participants or spectators

Opportunities for Ethiopia can be leveraged via corporate meetings and incentives in the short-term with the non-corporate sector providing excellent potential on a medium term basis. Associations in particular have demonstrated to be one of the most attractive segments because of their high spending delegates as well as their broader impact on the host destination. Knowledge transfer, inward investment, innovative partnerships and business deals are some of the added benefits that underpin these meetings resulting in more and more government support for infrastructure and marketing that can increase their country's share of this market and can help drive forward their economic development agendas.

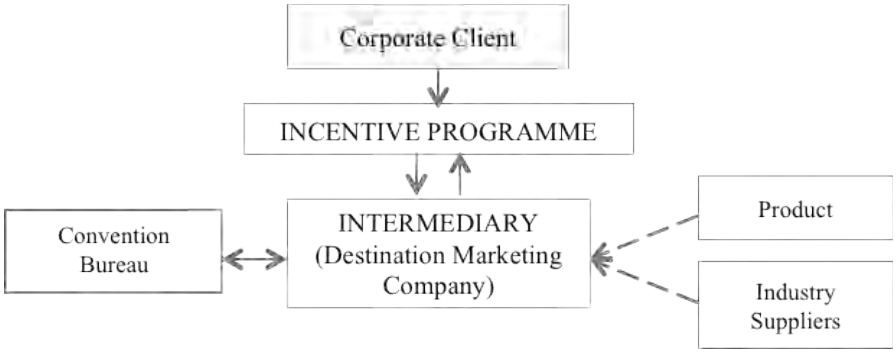


The diagram above illustrates how the value chain interfaces from supply level to the final hosting of the event. Roles and responsibilities of each link in the value chain are briefly described below.

- The Initiator / Client will either request a meeting or can be canvassed to hold their MICE event at a destination. Generally Association meetings that are compatible with a destination are bid for; the Association Board will appoint an international and/or local organising committee to oversee the meeting
- A conference bid is generated by either the Client or a Meeting Planner appointed by the Client; they are responsible for the decision regarding the host destination, the conference programme content and will keep control of the budget
- Convention Bureaus are responsible for marketing the destination to the MICE sector, for bidding support and for facilitating public and private sector collaboration
- Professional Conference and/or Event Organisers (Intermediaries) act as facilitators of MICE events; they are usually supported by a Local Organising Committee representing the Client; they interface and engage with product and industry suppliers
- The Product is the nucleus around which the MICE event is staged; products interact with both intermediaries and industry suppliers
- Industry Suppliers comprise all support services (entertainment, AV equipment, transport, tour operators for pre and post tours etc.); suppliers interact with product and intermediaries in delivering the conference successfully
- Pre and post tours are significant economic generators linked to a MICE Event that contribute to national GDP via growth to length-of-stay and geographical spread strategies

Intermediaries, Product and Industry Suppliers are the key economic generating drivers within the MICE value chain i.e. the private sector.

The incentive market follows somewhat different rules; it is strongly linked to the leisure tourism value chain whereby high-end incentive travel packages/itineraries rely on destination attractions and leisure products and facilities. The primary motivator of the destination choice is that it will provide an amazing experience.



The above diagram illustrates how the Incentive value chain interfaces from supply level to the final hosting of the event. Roles and responsibilities of each link in the value chain are briefly described below.

- A bid is generated by a Corporate Client; they are responsible for the decision regarding the incentive programme content and will keep control of the budget
- Intermediaries (Destination Marketing Companies in this instance) act as facilitators of incentive events; they research destinations, prepare the incentive programme itinerary and interface with product and industry suppliers
- The Product is the nucleus around which the incentive event is staged (either a resort-type product or an attraction supported by high-end lodge accommodation); products interact with intermediaries and industry suppliers
- Industry Suppliers comprise all support services (entertainment, AV equipment, transport, tour operators etc.); suppliers interact with product and intermediaries in delivering the incentive programme successfully

Potential MICE Source Markets

In 2013 international arrivals to Ethiopia totaled 681,249 with business and conference arrivals accounting for almost 28%.

The top source markets for MICE in Ethiopia (2009 – 2012) according to UNWTO and MoCT were the USA (16.7%) and UK, Germany, Italy and France (17.6%). African countries were not in the top generating source markets for conference tourism to the destination.

The top 10 source markets projected by World Travel and Tourism Council (WTTC) for business travel globally by 2020 are:

Rank by 2020	Country	US$ Billion
1	United States	310.1
2	China	233.1
3	Japan	101.4
4	United Kingdom	77.9
5	Germany	74.9
6	France	54.1
7	Italy	47.8
8	Spain	32.5
9	Russian Federation	31.1
10	Brazil	28.8

Going forwards a feasibility study would be required to identify important industry sectors of key relevance to the destination. This would determine pertinent potential MICE source markets for Ethiopia.

Addis Ababa is an important international diplomatic center; it is host to the headquarters of the African Union (AU) and the United Nations Economic Commission for Africa (UNECA). These organisations, along with the many Non-Governmental Organisations (associations / global aid agencies / development bodies) within the destination, are potential magnets of MICE business. Associations within specific and compatible professional and industry fields can be leveraged as target markets, as can the University of Addis via professors of faculties that may be linked to an association.

Regionally, the number of meetings and conventions within East Africa are growing rapidly; an important source market for Ethiopia to harvest. This market is easier to solicit as there is greater buyer awareness, it is easily accessible and delegates are familiar with the destination.

It is suggested that the international market be targeted through a phased approach depending on infrastructure development, capacity building and appropriate marketing. This niche is highly competitive, as buyers tend to look for the tried and tested!

The Incentive Travel market is probably the lowest hanging fruit of the MICE sector to target in the short-term. Ethiopia is 'undiscovered' and has outstanding unique natural, archaeological, historical and cultural attractions that could be marketed to this niche.

MICE Product Infrastructure and Development

Air Access	The International Bole Airport has become an increasingly important air hub in Africa with Ethiopian Airways one of the most respectable airline brands on the continent. Airlift and ease of access is a significant contributor towards delivering MICE success and in Ethiopia's case a competitive advantage regionally.
Venues	Current and planned MICE facilities offer a major opportunity and should be duly supported. For example the state-of-the-art United Nations (Economic Commission for Africa) Conference Centre, African Union HQ and Conference Centre, private conference facilities in hotels and the planned Addis-Africa International Convention and Exhibition Centre (AAICEC) provide a good range of venues for meetings and conferences.
Accommodation	The sector demands high quality accommodation particularly 4 and 5 star hotels – this component is currently catered for in Addis Ababa with approximately 1,312 five-star hotel rooms and 1,242 four-star hotel rooms (as per 2012 hotel list) including top international brand representation such as Hilton, Sheraton and Radisson Blu. As the sector accelerates into the future – this product niche would provide an important opportunity for inward investment, particularly in the high-end lodge arena to be geared for incentive tour groups.
Attractions	Ethiopia offers great potential for the packaging of pre and post conference tours as well as incentive itineraries to take to market.
Product	The sector will require a dedicated destination marketing organisation in the

development	form of a Convention Bureau. For Ethiopia to succeed in attracting business tourism collaboration with the private sector will be crucial, and capacity building of intermediaries such as Professional Conference and Event Organisers is key. It will also be important to identify and formalise industry suppliers such as transport providers, AV equipment suppliers, catering, entertainment and security services. An international meeting buyer will expect a full range of competent services when deciding on a host destination.

MICE Marketing

MICE marketing calls for a different approach and a dedicated strategy; this segment has a client base and distribution channels that are very different to those of the leisure market. To position Ethiopia as a contender for MICE business a phased approach is recommended.

Institutional Development	In the immediate short-term a dedicated business tourism desk at the ETO can be initiated with the objective of working towards the establishment of a more professionally driven international best-practice Convention Bureau. To start with the desk can facilitate the commissioning of a feasibility study and an audit of the destination to determine a future structure for MICE marketing. At the same time the desk can focus on the development of the pre- and post conference travel market and assist with a formalised marketing campaign in order to support efforts currently spearheaded by the UNECA conference centre. Key performance areas for the convention desk in years 1 and 2 are: • Concretise membership of SITE[38] Africa • Engage with industry stakeholders to identify suitable operators to handle incentive trips • Develop incentive itineraries • Develop a marketing strategy for incentive sales • Attend trade shows to promote incentive travel to Ethiopia • Arrange familiarisation trips to potential incentive buyers The Convention Bureau, once established, will develop a stand-alone strategic MICE business plan for Ethiopia.
Marketing / Promotion	A business tourism brand for Ethiopia will be required once the destination brand strategy is concretised, and this followed with the development of a comprehensive sales and marketing strategy.

The following phased approach is recommended:

Phase 1: Years 1 and 2	• Feasibility study and destination audit of suitable product inventory • MICE brand / logo origination • Communication development (website, printed collateral, PR) • Packaging of re and post tour itineraries to take to market • Attendance at trade shows for promotion of conference and incentive opportunities e.g.

[38] Society for Incentive Travel Excellence

	Meetings Africa, Johannesburg – annually in February IMEX[39], Frankfurt – annually in May IBTM[40] World, Barcelona – annually in November
Phase 2: Years 3 to 5	• Focused effort on consolidation of a coordinated MICE industry sector • Professional development via mentoring and/or training of human capital • Concretise a bidding strategy along with bid book and supporting collateral • Develop MICE promotion management tools (e.g. measuring the positive return-on-investment of hosting a meeting) • Product packaging for meetings, conferences and exhibitions • Develop an event strategy for the destination • Develop a database strategy • Attend trade shows • Host site inspection / familiarisation trips for qualified meeting buyers

It should be noted that international best practice advocates that a new convention center (such as the planned AAICEC) should be taken to market a minimum of two to three years prior to opening.

To succeed in the MICE sector the industry must work in a coordinated way and the destination must become visible and connected.

Addendum E: Birding and Trekking Special Interest Segment Profiles

A. Birding

Market segment

Increasingly birdwatchers, or avitourists as they are sometimes referred to, travel to long-haul destinations to spot new bird species they cannot see in their own region. These birder types are categorised as follows[41]:

- **Casual birders**, who enjoy birds in the garden or during leisure activities
- **Active birders**, who attend bird courses and go on trips primarily to watch birds
- **Committed birders**, who spend most of their spare time birding.

Avitourists are described as educated, wealthy and conservation supporting. These tourists also have a high potential to contribute to local communities, educate locals about the value of biodiversity and create local and national incentives for the preservation of natural areas.

Product requirements

Important product requirements for birders that Ethiopian Tourism Organization needs to take into account include safety, quality, availability and variety of birdlife, birding accessibility and infrastructure, and knowledgeable English-speaking guides who advise them on the potential

[39] IMEX – The worldwide exhibition for incentive travel, meetings and events
[40] IBTM World – International business tourism market
[41] Conradie, N (2010) International market potential of avitourism in South Africa http://bit.ly/1UfJuYF

location and physical attributes of a particular species as this increases the chances of seeing less common.[42]

Birders have rated the following as their top considerations for selecting one avitourism destination over another:

- Accessible walking trails
- Information about birds and lists
- Time in bird hides
- Time on boardwalks to enjoy views
- Extended tours to visit other places

In their pursuit of observing, identifying and studying birds in their natural habitat, avitourists travel to locations that are often overlooked by other tourists[43]

Travel Behaviour

Birders are frequent travellers, travelling on average three times a year and over 17 days for birding[44].

Birders tend to prefer an independent travel programme as opposed to an organised birding tour and generally travel either as a couple or part of a group[45].

Avitourists and their travel companions may be interested in activities other than birding, especially nature-based activities. Marketing additional non-birding attractions to avitourists may therefore increase their length of stay in a destination[46]. As such there exists an opportunity for Ethiopia to cross-sell avitourism activities with other tourist activities.

Marketing to birders

Avitourists are likely to be members of local bird or nature organisations, and use birding books and magazines, birding organisations and recommendations from other birdwatchers when deciding where to go.

Birdwatchers are a small community and many people run in to each other during birdwatching, either at home, on a birdwatching event or during a holiday.

Birders generally have access to Internet and e-mail facilities and are comfortable with planning their trip on the Internet[47].

International avitourists have a high degree of preference for specialist birding tour operators and are less inclined to use travel agencies and general tour operators to organise their trips[48].

Birding Shows and Fairs

[42] CBI (2013) Product Fact Sheet Birdwatching tourism by EU residents http://bit.ly/1GR9Ebg
[43] South African Department of Trade and Industry (2010) Avitourism in South Africa http://bit.ly/1gfLbpw
[44] CBI (Date Unknown) Product Fact Sheet Birdwatching tourism by EU residents http://bit.ly/1GR9Ebg
[45] Ibid.
[46] SA Department of Trade and Industry (2010) Avitourism in South Africa http://bit.ly/1gfLbpw
[47] Ibid.
[48] Ibid.

Dutch Bird Fair: Held annually, this trade fair includes a travel section with specialist birding tour operators exhibiting. www.dutchbirdfair.nl

Birdfair: Europe's largest annual bird watching fair, held annually in August, in Rutland. http://www.birdfair.org.uk

American Birding Expo: Hosted in the United States in October and defined as a retail show with birding products as well as specialist birding operators. http://www.americanbirdingexpo.com/

Online forums, associations and publications

Surfbirds: Offers listings of international tour operators specialising in birding in international destinations. http://www.surfbirds.com

Bird Forum: touted as the Internet's largest birding community and forum http://www.birdforum.net/

Vogelaar begint hier: An online forum in The Netherlands for bird watching. http://vogelaar.beginthier.nl/

Birding: A birding community in the UK. http://www.birding.uk.com

Birdwatch: A monthly magazine for birdwatchers. http://www.birdwatch.co.uk

The Association of Independent Tour Operators (AITO): Offers a listing of tour operators specialising in birding. http://www.aito.co.uk

Bird Watching Magazine: Claiming to be Britain's best-selling bird magazine. http://www.birdwatching.co.uk/

Birding Magazine: Distributed by the American Birding Association. http://www.aba.org/birding/

BirdWatching: North America's premier magazine about wild birds and birding. http://www.birdwatchingdaily.com/the-magazine/

Birding Associations and Clubs

African Birdclub: A British-based club for birders with a common interest in African bird species. http://www.africanbirdclub.org

American Birding Association: Represents the North American birding community. http://aba.org/

Tour Operators

Inezia Tours: Based in the Netherlands and offering a variety of nature-based and birding packages http://www.ineziatours.nl/

Bird holidays Limited: UK based tour operator specialising in birdwatching holidays, birding tours, wildlife safaris and wildlife cruises. http://www.birdholidays.co.uk/

Birdfinders: Worldwide birdwatching holidays to the best birding destinations on every continent. **www.birdfinders.co.uk**

Birding Africa: Recommended as one of the top 5 most recommended bird tour companies in the world. http://www.birdingafrica.com/

Birding Ecotours: Located in South Africa and specialising in worldwide birding tours, including tours to Ethiopia. www.birdingecotours.co.za

BirdingBreaks: Dutch travel agent specialising in birding breaks internationally. www.BirdingBreaks.nl

Birdquest Tours: Easy-going bird and wildlife adventures. http://www.birdquest-tours.com/

Avian Adventures: One of the leading UK-based bird watching tour companies.

Eagle Eye Tours: US-based offering high quality tours to worldwide destinations www.eagle-eye.com

Sunrise Birding: US-based small group bird watching tours and wildlife safaris worldwide. www.sunrisebirding.com

Wings: US-based offering birding tours worldwide. http://wingsbirds.com/

Greentours: Provides Wildlife, Alpine Flower, Mammal Tours, Bird Watching and much more throughout UK, Europe, Africa, Americas, Asia, Australia. http://www.greentours.co.uk/

Ornitholidays: touted as the first birdwatching tour company in the world. www.ornitholidays.co.uk

Rainbow Tours: Pioneers of responsible travel, Rainbow Tours specialise in tailor-made holidays and small group tours to Africa, Madagascar and Latin America. www.rainbowtours.co.uk/

Rockjumper Birding Tours: One of the world's longest established and most highly regarded birding tour companies. www.rockjumperbirding.com/

B. Trekking

Market Segment

The trekking market falls within the adventure tourism segment, a traveller profile that has grown an estimated 65% per year from 2009 to 2012[49]. Within the adventure tourism segment, trekking is designated a hard adventure tourism market[50].

Seven out of the 10 largest markets for adventure/trekking travel retail sales are Western European (UK, Switzerland, Germany, France, Italy, Austria and the Netherlands) [51].

[49] Adventure Travel Trade Association (2013) Adventure Tourism Market Study http://bit.ly/1xWbncD
[50] CBI (2013) CBI Product Factsheet: Trekking tourism from the Europe to Asia http://bit.ly/1C9pRf8

Adventure travellers are generally younger than their non-adventure travel counterparts, and are well educated with at least 37% of adventure travellers having at least a four-year degree. Over 70% of adventure travellers have a valid passport and most travel either with a partner, family or in a group.

Travel behaviour

Highly educated and prolific consumers of traditional and new media, adventure travellers spend over six hours a day reading social media, blogs and online sites.

Their key motivations for travelling include exploring new places and discovering exciting new activities[52] and although they are more likely to use the professional service of guides, instructors, specialist tour operators or other services[53], they are also comfortable with sourcing their own information online.

Their destination choices are influenced predominantly by family and friends, review websites and travel magazines, and travel with their partners and families[54].

Product requirements

Trekkers seek a physical and mental challenge (in different degrees), authentic experiences and they like to connect with local people. Sustainability and responsible tourism are important to them and they are looking for a once-in-a-lifetime experience[55].
Adventure travellers cite relaxation, exploring new places, time with family and learning about new cultures as key to their travel experiences.

Adventure travellers also rank areas of natural beauty as the most important factor in choosing their destination, followed by the activities available and the climate of the destination. Many trekkers expect and prefer an untouched natural environment for their trekking and are particularly interested in the sustainability of a destination and trekking programme.

Adventure travellers can be attracted to a destination with a well-protected environment and a range of adventure activities, and are not tied to visiting a destination where they have friends or family[56].

Safety of treks and safety of the destination is of utmost importance. As treks are often done in lesser-developed and mountainous areas, trails can be easily damaged by natural disasters, flooding, warmth or drought[57].

A good English-speaking guide can make or break the experience. Trekking tourism providers can add value to their treks by having good guides that are able to tell interesting facts and stories about the trek they are doing[58].

---

[51] Ibid.
[52] Skift (2014) Profile of the Adventure Traveler: Smart and Not Afraid http://bit.ly/1zeXkmc

[53] Ibid.
[54] Skift (2014) Profile of the Adventure Traveler: Smart and Not Afraid http://bit.ly/1zeXkmc

[55] Ibid.
[56] Ibid.
[57] CBI (2013) CBI Product Factsheet: Trekking tourism from the Europe to Asia http://bit.ly/1HDudxo

Marketing to Trekkers

Adventure travellers are typically savvy tourists who spend time researching and planning their ideal experiences. They are more likely to prepare for a trip prior to leaving, relying on Internet research and consulting with friends and family, and recommending trips by posting on social media sites[59].

They also read special-interest publications such as National Geographic, National Geographic Traveller[60], Adventure Travel Magazine, Wanderlust and Adventure World Magazine, among others.

Research indicates that they are more likely than their non-adventure counterparts to use professional services especially if they are older and depending on their country of origin. Europeans and British travellers are more likely to use professional services than American travellers for instance. Their average trip spend is also relatively high[61].

The high proportion of adventure travellers doing online research emphasizes the importance of maintaining a strong web presence and online marketing strategy. Adventure travellers also use social media prolifically. This means they can be important promoters for destinations and activities, recommending travel to their friends and family through social media and posting reviews online.

Trade Shows

Adventure Travel Life: An adventure travel event for consumers held in January in London. http://www.adventureshow.co.uk

The Telegraph Outdoor Adventure & Travel Show: Another consumer adventure travel show held in London, but in February. http://telegraphoutdoorshow.co.uk

Travel & Adventure Show: Held in several cities across the United States from January to March. http://travelshows.com/

The Outdoor Adventure & Travel Show: Held in several cities across Canada from February to April. http://outdooradventureshow.ca

The Adventure Travel Expo: A consumer show held in both Melbourne and Sydney, Australia. http://bit.ly/1dDULAv

Adventure Travel World Summit: Organized by the Adventure Travel Trade Association for adventure tourism stakeholders including tour operators. http://bit.ly/1wFgXSc

Fiets en Wandelbeurs: A cycling and walking trade fair held every February in Amsterdam. http://www.fietsenwandelbeurs.nl

Tour Natur: A walking and trekking trade fair held in September in Dusseldorf. http://www.tournatur.com

---

[58] Ibid.
[59] Ibid.
[60] Adventure Travel Trade Association (2013) Adventure Tourism Market Study http://bit.ly/1xWbncD
[61] Ibid.

Pure Life Experiences: A new show focusing on the 'evolved' traveller seeking experiences. http://www.purelifeexperiences.com

Adventure Sports Fair: largest adventure sports event in Latin America, held in Brazil in September. http://www.adventurefair.com.br/english/

Online Forums, Associations and Publications

Adventure Travel Trade Association (ATTA): A global trade organisation for the adventure travel industry with a full list of specialist adventure travel tour operators. http://bit.ly/1HDvogn

Ladies Trekking Club: A club that unites active and adventurous women from all over the world. http://www.ladiestrekking.com/

London Adventure Group: London-based group that organises adventure travel trips in the UK and overseas for its members http://londonadventuregroup.org/

Adventure Collection: A partnership of the world's best adventure travel companies. www.adventurecollection.com

Travel Africa Magazine: Only international magazine dedicated to exploring Africa and travel to Africa. http://travelafricamag.com/

Adventure World Magazine: Covers a range of adventure sports including trail running, trekking and general adventure travel. http://www.adventureworldmagazine.com/

Wanderlust Magazine: Wanderlust is a British travel magazine, covering adventurous, cultural and special-interest travel. www.wanderlust.co.uk/

Active Traveller: Guide to activity and adventure holidays in the UK and abroad. http://active-traveller.com/

Backpacker Magazine: Source for backpacking gear reviews, outdoor skills information and advice, and destinations. http://www.backpacker.com

365 Adventure.com: Online adventure tourism and travel forum http://www.365adventure.com/forum/

BootsnAll: Independent travel experts forum with adventure travel section http://boards.bootsnall.com/adventure-travel-f26.html

German Alpine Club: the world's largest climbing association and the eighth largest sports union in Germany. The Club is the responsible body for sport and competition climbing, hiking, mountaineering, hill walking, ice climbing, mountain expeditions as well as ski mountaineering. http://www.alpenverein.de

Other alpine hinking clubs:

- Austria: Österreichischer Alpenverein (ÖAV)
- France: Club Alpin Francais (CAF)

- Italy: Club Alpino Italiano (CAI)
- Switzerland: Schweizer Alpen-Club / Club Alpin Suisse (SAC)

Others of interest: http://www.hikingandbackpacking.com/organizations.html

Tour Operators

Intrepid Group: World's largest provider of adventure travel experiences. http://www.intrepidgroup.travel

Footprint Adventures: Adventure holidays in Asia, Africa, and South America. www.footprint-adventures.co.uk/

360 Expeditions: Adventure travel, holidays, extreme expeditions and charity challenges. http://www.360-expeditions.com/

Exodus: The original activity and adventure holiday company**.** http://www.exodus.co.uk/

Explore: Small group adventure holidays including walking and trekking tours https://www.explore.co.uk/

KE Adventure Travel: Boats a strong collection of worldwide trekking holidays.
http://www.keadventure.com/

Macs Adventure: Specialise in walking holidays, cycling holidays, and tailor made adventures in the UK, Europe, and around the world.
http://www.macsadventure.com/

Travel The Unknown: Promising worldwide active tours, including trekking. http://www.traveltheunknown.com/

Walks Worldwide: Independent specialist for trekking and walking holidays.
http://www.walksworldwide.com/home.html

Boundless Journeys: Touted as one of the "Best Adventure Travel Companies on Earth offering hiking and trekking. http://www.boundlessjourneys.com

Adventures Within Reach: Adventure travel trips with activity, culture, and nature, which are customizable, flexible, and affordable.
http://www.adventureswithinreach.com/

World Expedition: International tour operator specializing in small group trekking and adventure travel holidays and vacations since 1975. http://www.worldexpeditions.com/

Rei Adventures: Active vacations, weekend getaways, family adventures, and volunteer expeditions for all levels of experience.
http://www.rei.com/adventures/

Addendum F: Ethiopian Airlines Destinations and Flight Times

Destination	Flight time	Destination	Flight time
Africa		**Europe & America**	
Abidjan	8h 05m	Brussels	9h 10m
Abuja	5h 25m	Dublin	33h 30m
Accra	5h 40m	Frankfurt	6h 40m
Bamako	6h 45m	London	7h 20m
Bangui	25h 40m	Los Angeles	20h 30m
Berbera	No info	Madrid	11h 00m
Blantyre	4h 20m	Milan	8h 25m
Brazzaville	4h 20m	Paris	6h 55m
Bujumbura	4h 00m	Rome	6h 00m
Cairo	3h 55m	Rio de Janeiro	29h 24m
Cape Town	9h 10m	São Paulo	44h 35m
Conakry	10h 35m	Stockholm	9h 50m
Cotonou	25h 50m	Toronto	18h 30m
Dakar	9h 50m	Vienna	6h 30m
Dar es Salaam	2h 35m	Washington	13h 15m
Djibouti	2h 25m		
Douala	6h 15m	**Gulf, Middle East & Asia**	
Entebbe	4h 20m	Bahrain	22h 50m
Enugu	4h 55m	Bangkok	9h 00m
Freetown	25h 35m	Beijing	11h 10m
Harare	4h 05m	Beirut	4h 40m
Hargeisa	1h 40m	Dubai	4h 15m
Jimma	0h 50m	Delhi	6h 40m
Johannesburg	5h 30m	Dammam	9h 00m
Juba	8h 10m	Doha	9h 45m
Kano	4h 30m	Guangzhou	31h 25m
Khartoum	1h 55m	Hangzhou	15h 20m
Kigali	2h 35m	Hong Kong	11h 00m
Kilimanjaro	2h 15m	Jeddah	2h 55m
Kinshasa	5h 45m	Kuala Lumpur	16h 20m
Lagos	5h 35m	Kuwait	04h 10m
Libreville	4h 35m	Manila	13h 30m
Lilongwe	6h 10m	Mumbai	4h 55m
Lome	5h 45m	Muscat	4h 20m
Luanda	11h 35m	Narita	28h 20m
Lubumbashi	5h 30m	Riyadh	3h 25m
Lusaka	6h 05m	Sana'a	1h 45m
Malabo	4h 45m	Seoul	15h 45m
Malakal	No info	Shangai	11h 30m
Maputo	5h 30m	Singapore	16h 55m
Mombasa	2h 25m	Tel Aviv	4h 40m
Monrovia	28h 00m		
N'Djamena	3h 45m	**Domestic**	
Nairobi	2h 00m	Aksum	1h 30m
Ndola	4h 00m	Bahir Dar	1h 00m
Niamey	5h 30m	Dire Dawa	1h 00m
Ouagadougou	7h 30m	Gambela	1h 15m
Pointe-Noire	5h 00m	Gondar	1h 05m
Seychelles	16h10m	Lalibela	1h 00m
Zanzibar	4h 05m	Mekele	1h 15m

Addendum G: Broad Categorisation of VICs

The following is a broad categorisation of the types of Visitor Information Centres as part of the Ethiopia i-Network:

Category A: Gateway Visitor Information Centres.
Category B: Regional Visitor Information Centres or Hub VICs.
Category C: Local Visitor Information Centre

Category A: Gateway Visitor Information Centres

These are VICS that are of strategic importance to the overall mission and goals of the ETO, namely increased length of stay, spend and geographical spread. Ideally, ETO would operate these VICs themselves or if not possible, outsource this service to the private sector by way of a tender process and a set of criteria and requirements.

These centres include *VICS at the most prominent locations and concentration points for international visitors*, both leisure and business – e.g. Bole International Airport (operated by ETO in partnership with Ethiopian Airlines and the Airport Authority) and key locations such as Meskel Square.

These are substantial, professional, sales orientated Centres, offering full itinerary planning and booking services for travel not only in Addis Ababa, but also throughout Ethiopia.

The criteria for defining Gateway Centre locations include:

- *Current and potential market demand* with a real need for information and booking services. This may be ascertained from analysis of available data and, if necessary, new surveys.
- Availability of a *suitable, highly accessible site.*
- Opportunities for *substantial partnership* involvement.
- Potential for *sales* of accommodation, other tourism products, travel goods and souvenirs.

These centres are open seven days per week over extended hours, appropriate to the location. The role of these centres will be to support the marketing strategy generally and, more specifically, to provide:

- Information
- Itinerary planning
- Accommodation and tour bookings
- Bookings for national parks and other leisure facilities

Significant capital and operational funding from public resources will be required initially to establish and operate these centres. The potential to generate significant levels of commercial income or partnership funding should be pursued vigorously, with the aim of achieving a level of 30% self generated funding over a three to five year period.

The opportunity for additional activities will vary according to the location in question. For example, at Bole International airport, space and retail opportunities are limited, constraining the potential for display of literature and the scope for income generation.

Category B: Regional Visitor Information Centres

VICs that are located at major strategic locations and visitor convergence points in the regions e.g. Aksum, Lalibela, Mekelle (for Afar), Bishoftu, Arbaminch etc.
The focus for visitor services delivery around the region should be regional tourism 'hub VICs' that:

- Offer a full range of high quality counter services (as for Gateway Centres) and are regarded as the main VIC within their area.
- Are open seven days per week over hours appropriate to customer demand
- Are responsible for visitor services generally within their areas – including overseeing the standards and operations of local VICs and information points, print distribution, etc.
- Provide interpretation regarding their area as a tourism destination – displays, AV shows, exhibitions, etc.
- Make full use of IT in their operations.
- Share skills and knowledge amongst their local VICs.
- Undertake 'back office' visitor services functions, including industry liaison (and maintaining the regional product database for their areas

The criteria for location of these centres should be subject to research to determine optimum location, in terms of potential visitor numbers, commercial potential and centrality within a logical geographical area, but also taking account of the suitability (or otherwise) of existing premises.

Because of their pivotal role within their areas, in terms of both front and back office activities, these Hubs will require significant public funding.

Category C: Local Visitor Information Centres

VICs at key local attractions and important local convergence points, including:

- VICs at local town and visitor points centres such as Bahir Dar, Tis-Abay, Gondar, Debark (Simien Mountains), Wukuro, Hawzien, Dire Dawa, Adama, Bale Mountains, Dodola, Asela, Hawassa, Jinka, Konso, Dilla, etc.
- Temporary VICs used for events such as religious and cultural festivals, sport events, etc.
- Visitor information distribution at MICE facilities and City attractions, such as EC Convention Centre, AU Convention Centre, Entoto complex, the National Museum, etc.

These VICs will be of varying types, size and a range of locations. These are visitor points that would not deal with high volumes of tourists and which would deal primarily with local enquiries by both visitors and residents. Content would include literature displays, location and reference maps, and perhaps touch screen kiosk access to the official website.

These points could either be staffed or without staffing. An attractive information point module should be designed, to incorporate literature and map displays and where possible a computer screen to access the official ETO Web site. These modules would be situated in areas where there is a need for information provision, but a staffed centre is not viable. The precise locations must be secure and well managed.

Currently VICs in Ethiopia are not regulated or supported by ETO. This is not ideal as the quality of service varies greatly from region to region and VIC to VIC. In addition, the branding and look and feel of VICs in the country differ, confusing visitors.

The strategy proposes that ETO should formally accredit VICs. VICs would be accredited according to service standards and this accreditation would take place every two to three years, depending on the category of VIC.
The accreditation of VICs is designed to provide the visitor with a consistent and recognised level of information and customer service throughout the region. All VICs will be required to be accredited by ETO and the organisation will need to manage the accreditation programme.

Extensive marketing and promotion of the Ethiopia i-Network brand will ensure that visitors to Ethiopia recognise accredited VICs and the value they represent. VICs with accreditation will have a competitive advantage over non-accredited VICs.

Visitor Information Centres that achieve accreditation will be:

- Recognised as part of the official network of Ethiopia Visitor Information Centres (i-Network) with publicity and marketing that goes with it
- Included in the ETO generic and cooperative marketing brochures
- Eligible to use the well promoted, unique " i" sign symbol
- Included in the ETO website
- Included in the general promotion of the VIC network to the visitor and the tourism industry
- Able to use the ETO brand (within the regional brand family) and branded materials (uniforms, signs, etc.)
- Able to sell branded merchandise
- Able to use the Ethiopia database system, including VIC interface and knowledge exchange
- Access to information training (skills, product knowledge, etc.)

ETO representatives will conduct inspections and evaluations of VICs to ensure minimum standards are met and maintained. The following table provides a summary of criteria for various levels of VICs and the level of excellence that the VIC needs to attain.

VIC CATEGORY/ CRITERIA	Gateway Visitor Information Centres	Regional Visitor Information Centres (Hubs)	Local Visitor Information Centres/Mobile VICs
Full range of information services across Ethiopia	▫		
Limited range of information available		▫	▫
Reservation services	▫	▫	
Open Seven Days a Week	▫		
Open 5 days a week or more		▫	▫
Full use of IT in operations	▫		
Limited use of IT in operations		▫	▫
Share skills and knowledge amongst local VICs	▫	▫	
Training of staff	▫	▫	
Provide interpretation regarding their area as a tourism destination	▫	▫	▫
Undertake 'back office' visitor services functions, including industry liaison and maintaining the ETO	▫	▫	

product database for their areas			

References

Altés, C. (2013): Field trip to the Northern Circuit, unpublished report

AMC (2015): Cape's tourism marketing bonanza http://bit.ly/1HUtLtI

ATC (2012): Assessment of Training programmes for enhancement of Tourism Training institutions and professionalization of Hospitality Workforce

Buhalis (2000): Marketing the competitive destination of the future, Tourism Management Volume 21, Issue 1 pgs 97-116

Centre for Promotion of Imports (2014): http://www.cbi.eu/market-information/tourism

Deloitte (2010): Hospitality 2015 – Game Changers or spectators?

Digital Fire (2010): The importance of email marketing in the tourism industry http://bit.ly/1OO49Tz

Dunira Strategy (2013): Destination Development Southern Route

Dunira Strategy (2013) : Destination Development Northern Route

ETO (2014): Preliminary identification of weaknesses/problems of the tourism sector in EWCA (2013): Development of a Marketing Strategy for Wildlife Tourism in Ethiopia

Frankfurt Zoological Society (2012): Bale Mountains National Park General Management Plan

Gobena and Gudeta (2013): Hotel sector investment in Ethiopia

Govender, I (2015): Travel Bloggers who take you places http://bit.ly/1xIdMeQ

Government of Ethiopia (2008): Investing in Tourism: a briefing for tour operators

GTZ (2010): An Assessment of Sport Hunting in Ethiopia

IGAD (2013): STMP Tourism Master Plan Ethiopia presentation

International Congress and Convention Association (2014): www.iccaworld.com

IPK International (2013): ITB World Travel Trends Report 2013/2014

ITB Berlin (2013): ITB World Travel Trends Report

Overseas Development Institute (2009): Enhancing private sector and community engagement in tourism services in Ethiopia

Ministry of Finance and Economic Development (2103): A Plan for Accelerated and Sustained Development to End Poverty (PASDEP) - 2005/06-2009/10. Volume I: Main Text

MoCT (2009): Tourism Development Policy (2009)

MoCT (2012): Capacity Building Gap Assessment and Intervention Plan -Volume 1: Institutional Assessment

MoCT (2013): The First International Visitor's Exit Survey

MoCT (2013): Tourism Statistics Bulletin 2009-12

MoCT (2015): Tourism Marketing and Branding Strategy for Ethiopia, Report 2: Situation Analysis

Modiano (2012): The destination marketing landscape: the role of DMOs **http://bit.ly/1i0vfyi**

Nielsen (2012): Global consumers' trust in 'earned' advertising grows in importance http://bit.ly/1fyoMzu

PhoCusWright (2012): Empowering Inspiration: The Future of Travel Search

Psarros (2013): Integrated destination marketing and the future DMO http://bit.ly/1nWaqh9

Skift (2015): Travel brands look to Instagram for the influencer bump http://bit.ly/1FPmWbD

Solimar (2013): Perceptions of Bird Watching Tourism in Ethiopia
Thygesen (2014): Mobile trends: how they influence travel and tourism http://bit.ly/1KCaCLF
University of South Africa dissertation (2010): Branding Ethiopia: Opportunities and Challenges
UNWTO (2012): Handbook on Tourism Destination Branding http://bit.ly/1DZUVbc
UNWTO (2014): Tourism highlights
UNWTO (2015): various statistics on inbound / outbound international arrivals by country from UMWTO's online intelligence resource.
Wikipedia (2015): Internet in Ethiopia http://bit.ly/1G77Vmb
World Bank Group (2012): Ethiopia's tourism sector: Strategic paths to competitiveness and Job creation
World Travel and Tourism Council (WTTC) (2014): Travel & Tourism Economic Impact 2014 Ethiopia, unpublished report
World Bank (2006): Ethiopia: Towards a Strategy for Pro-Poor Tourism Development
World Bank (2013): Tourism in Africa: Harnessing Tourism for Growth and Improved Livelihoods
World Bank (2013): Ethiopia Economic Update II Laying the Foundation for Achieving Middle Income Status
World Economic Forum (2013): The Travel & Tourism Competitiveness Report 2013

Acronyms and abbreviations

AAICEC	Addis Ababa International Convention and Exhibition Centre
AU	African Union
BRIC	Brazil, Russia, India, China
CEO	Chief Executive Officer
CRM	Customer Relationship Management
DMO	Destination Marketing Organisation
ESTDP	Ethiopia Sustainable Tourism Development Programme
ETO	Ethiopian Tourism Organisation
EU	European Union
ICCA	International Congress and Convention Association
ICT	Information Communication Technologies
KPA	Key Performance Area
KPI	Key Performance Indicator
MBR	Market-based Representative
MICE	Meetings, Incentives, Conventions, and Exhibitions
MoCT	Ministry of Culture and Tourism
SEO	Search Engine Optimisation
SITE	Society for Incentive Travel Excellence
TGF	Tourism Growth Fund
UNECA	United Nations Economic Commission for Africa
UNESCO	United Nations Educational, Scientific and Cultural Organisation
UNWTO	United Nations World Tourism Organisation

VFR	Visiting Friends and Relatives
VIC	Visitor Information Centre











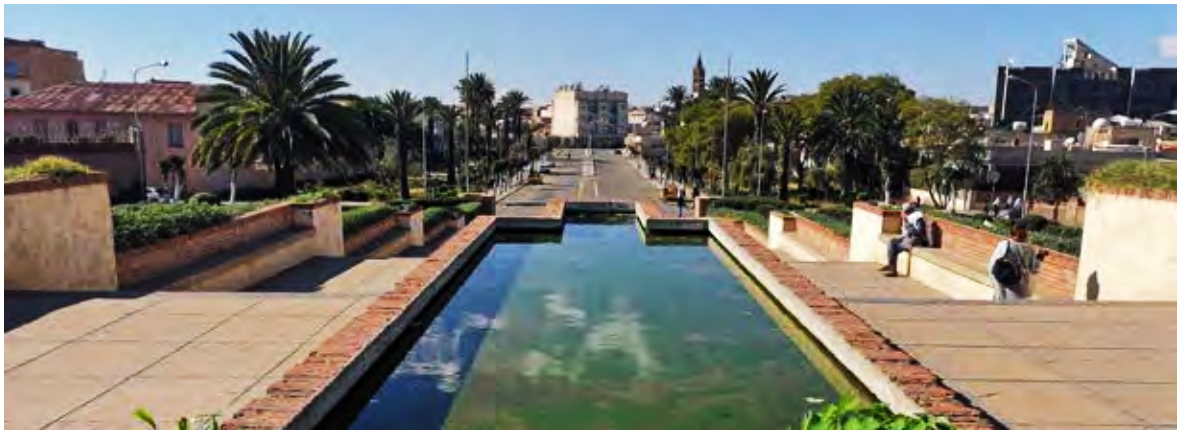
IGAD

SUSTAINABLE TOURISM MASTER PLAN 2024-2034









IGAD

SUSTAINABLE TOURISM MASTER PLAN 2024–2034

Economic Commission for Africa
Sub-Regional Office for Eastern Africa
P.O.Box 4654
Kigali, Rwanda
Tel.: (+250) 788 155 400
Email: eca-sro-ea-srdc@un.org
Web: www.uneca.org

© 2024 United Nations
Kigali, Rwanda
All rights reserved.

Cover photo Credit: Shutterstock

Title: IGAD Sustainable Tourism Master Plan 2024-2034

Language: English

Material in this publication may be freely quoted or reprinted. Acknowledgement is requested, together with a copy of the publication.

The designations employed in this publication and the material presented in it do not imply the expression of any opinion whatsoever on the part of the Secretariat of the United Nations Economic Commission for Africa concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries.



STMP 2024-2034

ACKNOWLEDGMENTS

The development of the Sustainable Tourism Master Plan (STMP) 2024-2034 for the IGAD region was made possible through technical and financial support of the United Nations Economic Commission for Africa UNECA), Sub-Regional Office for Eastern Africa (SRO-EA). On behalf of the Member States, the IGAD Secretariat is highly grateful for this continued support from UNECA.

The formulation process of the STMP 2024-2034 was spearheaded by Rayviscic Mutinda, under the direct supervision of Geoffrey Manyara and guidance by Zacharia Kingori (IGAD) and Emelang Leteane, Head of Sub-Regional Initiatives of SRO-EA. Mama Keita, the Director of SRO-EA, and Osman Babikir, the IGAD Director of Economic Cooperation and Regional Integration, provided overall leadership for the process. Their commitment to the timely delivery of the STMP is commendable and highly appreciated.

Special thanks are extended to the staff of the IGAD Secretariat and UNECA for their unwavering support, particularly in providing logistical assistance, planning, and facilitating stakeholder consultations across the region.

Our deep appreciation also goes to the official Focal Point Persons from the IGAD Member States for their leadership in mobilizing and coordinating national-level activities and stakeholder consultations. We are in particular, highly indebted to the following Focal Point Persons: Mr. Osman Abdi Mohamed (Djibouti), H.E. Sileshi Grima (Ethiopia), Mr. Vincent Bwire (Kenya), Mr. Ali Abdillahi Ahmed (Somalia), Mr. Bol Aher (South Sudan) and Mr. Ojok Denis Rodney (Uganda). To all you ladies and gentlemen, please accept our highest appreciation. In the same breath, we also appreciate the Tourism Experts' Consultative Group drawn from the civil society, academia, public and private sectors, for their expert contributions and for synthesizing the diverse inputs from stakeholders into a coherent plan. These were – Akok Ngor Joseph, Azage Sisay Getachew, Bekele Nahome Admassu, Bradford Ochieng, Daniel Muoki Kasanga, Jean Bwamugisha, Jim Ayorekire, John Kioli Kalua, Juma Nyende, Lilly Ajorova, Pearl Hoareau Kakooza, Robleh Djibril Sougal, Susan Mugechi Ongalo, Syad AliHassan and Yasir Mohamed Baffo

The formulation of the Sustainable Tourism Master Plan (2024-2034) was extensively consultative, drawing valuable inputs from a wide array of tourism stakeholders, including representatives from the public sector, private sector, academia, and civil society. IGAD and UNECA express their sincere gratitude to all the esteemed tourism stakeholders for the constructive criticism, insights, information, and advice have been instrumental in shaping this Master Plan.

FOREWORD



The Intergovernmental Authority on Development (IGAD) region holds immense tourism potential, positioning it to become a significant income generator and a key provider of employment opportunities. With its rich and diverse tourism assets, each IGAD member country offers unique experiences, from ancient archaeological sites and vibrant cultural festivals to diverse wildlife and breathtaking landscapes. As the cradle of mankind, the region boasts a heritage that should attract global attention. However, despite its vast potential, the region's share of global and continental tourist arrivals does not yet reflect this comparative advantage.

Nevertheless, tourism remains a vital economic pillar for most IGAD Member States, significantly contributing to GDP and job creation. This success is largely due to the region's socio-economic reforms and the dedicated efforts of its Member States, as evidenced by national and regional strategies and plans. Recognizing the importance of tourism, the IGAD Secretariat, through the IGAD Regional Strategy 2021-2025, has prioritized the competitive and sustainable development of the tourism sector. Increased investment in tourism is anticipated, which will further enhance its contribution to regional economic growth.

The IGAD Secretariat has developed the regional Sustainable Tourism Master Plan (STMP) 2024-2034 as a framework for sustainable tourism development in the region, aiming to promote socio-economic growth, alleviate poverty, and foster regional integration. Drawing on national, regional, continental, and global socio-economic development frameworks, the STMP 2024-2034 aspires to transform the IGAD region into an integrated, globally competitive, and sustainable tourism destination. It marks a significant milestone in the systematic development of IGAD tourism.

The successful implementation and monitoring of the STMP 2024-2034 will require strong involvement and commitment from Member States, the private sector, civil society, communities, and development partners. It is essential to recognize that there are no quick solutions, and the IGAD region must take decisive action now for tourism to become a significant industry in its development agenda, as envisioned in the IGAD Vision 2050.

Lastly, I would like to extend my deepest gratitude to the United Nations Economic Commission for Africa (UNECA), through their Sub-Regional Office for Eastern Africa, for the financial and technical assistance provided to the IGAD Secretariat for the preparation of the STMP 2024-2034. I also extend my sincere gratitude to all stakeholders who contributed in various ways to the successful development of this Master Plan. The IGAD Secretariat remains committed to supporting all efforts toward its successful implementation.

H.E. Workneh Gebeyehu (Ph.D.)
IGAD Executive Secretary

Executive Summary



EXECUTIVE SUMMARY

The IGAD region boasts a wealth of diverse tourism resources, with each country offering unique tourism experiences, ranging from ancient archaeological sites and vibrant cultural festivals to diverse wildlife and stunning landscapes. These diverse offerings make the region a compelling destination for travellers seeking authentic cultural experiences, adventure, and natural beauty. As the region further develops its tourism infrastructure and promotes cross-border initiatives, it is poised to become an increasingly sought-after destination for global travellers. With such resource base, the tourism industry remains a key economic pillar for the majority of IGAD Member States, significantly contributing to GDP and employment generation.

Despite this, the region's share of global and continental tourism arrivals does not reflect its comparative advantage. This fact informed the need, ten years ago, to formulate a regional tourism development framework – the Sustainable Tourism Master Plan (STMP) (2013-2033) – aimed at guiding sustainable tourism development across IGAD Member States. As the STMP 2013-2023 period concludes, the successes and shortcomings encountered offer valuable lessons for the formulation of the STMP 2024-2034.

VISION OF THE STMP 2024-2024

Anchored on a number of regional, continental and global socio-economic development frameworks, the STMP 2024-2034 seeks to position the IGAD region as a cohesive, globally competitive, and sustainable tourist destination.

AIM AND CBJECTIVES OF THE IGAD STMP 2024-2034

The primary aim of the STMP is to provide IGAD Member States with a regional framework for sustainable tourism development, contributing to socio-economic development, poverty alleviation and to promoting regional integration. Specifically, the STMP 2024-2034 seeks to achieve five objectives:

1. Identify strategic areas of cooperation in tourism development among the IGAD Member States
2. Identify appropriate strategies and actions that can enhance the competitiveness of individual IGAD Member States and, subsequently, the IGAD region as a global tourism destination.
3. Provide a detailed roadmap for the implementation of the STMP strategic actions.
4. Develop an efficient coordination mechanism for tourism development within the IGAD region.
5. Formulate a resource mobilization plan to ensure sustainable financing of the STMP priority programmes.

GUIDING PRINCIPLES OF THE STMP 2024-2034

The STMP adopts a stakeholder-led tourism planning and development approach that integrates decision-making with other economic sectors and incorporates the perspectives of key stakeholders, including government, private sector, academia, civil society and local communities. While designed to be goal-oriented rather than reactionary, the STMP is also adaptable to changes in both the internal and external tourism environment.

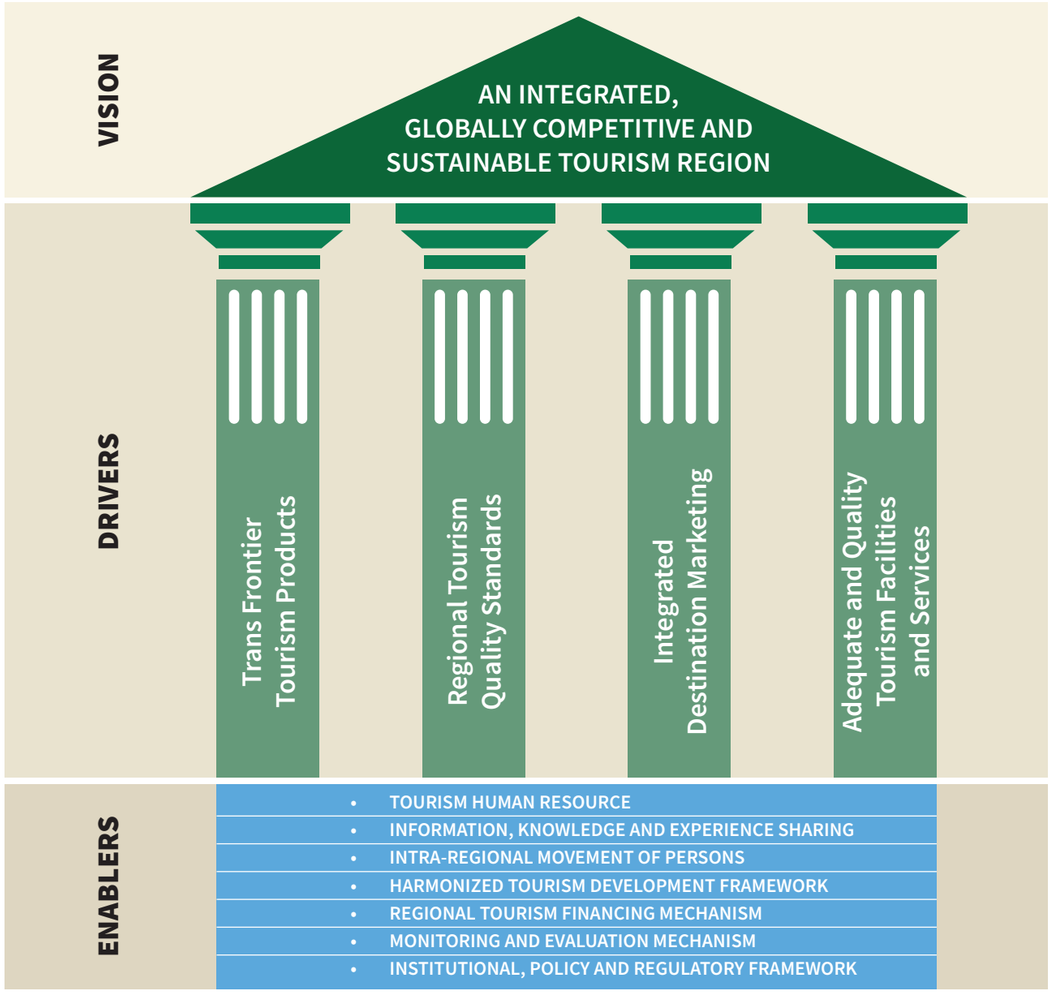
The formulation of the IGAD STMP 2024-2034 will be guided by the following principles:

1. The STMP should facilitate deeper regional integration within the IGAD region, aligning with IGAD's mission and broader goals to enhance collaboration and mutual benefits among Member States
2. The Master Plan should articulate a clear and compelling vision for tourism development in the IGAD region, and outline strategic interventions to achieve this shared vision
3. The STMP should strengthen the competitiveness of the IGAD region as a premier tourist region through targeted strategies that enhance attractiveness and market positioning
4. Tourism development strategies should be harmonized with the wider national, regional, continental, and international tourism and related sectoral initiatives to ensure coherence and maximize impact
5. The Master Plan should promote the principles of interdependence and mutual interest among IGAD Member States
6. The STMP should enhance local capacity for tourism development by implementing policies that support skills training, access to funding and markets, and integration into the tourism value chain.
7. The STMP should provide avenues to deepen partnerships in tourism development between the public and private sectors, development partners, and civil society
8. The development of tourism in the IGAD region should pursue an integrated approach with specific focus on developing and optimizing its value chain and creating policy-convergence and synergies with relevant economic sectors.



IGAD STMP 2024-2034 STRATEGIC DIRECTION

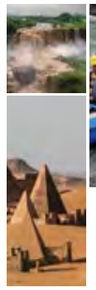
To realize the Vision of the IGAD STMP 2024-2034, it will be necessary to focus on key priority intervention areas that guarantee competitiveness and serve as key frameworks for sustainable and long-term tourism growth. In this context, the STMP will focus on four drivers of competitiveness and seven enablers, as provided in the Strategic Map below:



Each pillar is presented as a priority area and supported with appropriate strategic objective and actions.

STMP 2024-2034 PRIORITY AREAS, STRATEGIC OBJECTIVES AND STRATEGIC ACTIONS

PRIORITY AREA	STRATEGIC OBJECTIVES	STRATEGIC ACTIONS
PRIORITY AREA 1: TRANS-BOUNDARY TOURIST PRODUCTS	Develop integrated tourism products across the different IGAD Member Countries	Map potential flagship trans-boundary tourism products
		Formulate product development plans for trans-boundary products
		Implement flagship transborder tourist product development plans
PRIORITY AREA 2: REGIONAL TOURISM QUALITY STANDARDS	Establish uniform quality standards for the tourism sector across the IGAD region to enhance service consistency, improve visitor experiences, and promote regional competitiveness.	Develop unified quality standards for the tourism industry
		Create a Regional Quality Standards Certification Programme
PRIORITY AREA 3: TOURISM PROMOTION AND MARKETING	Market and promote the IGAD Member States as competitive destinations for both regional and international visitors	Formulate a regional tourism marketing strategy
		Pursue a unified promotional effort in the international marketplace
		Create a destination marketing strategy for the IGAD regional Market
		Develop a Destination Management System and a Tourism Portal
PRIORITY AREA 4: PROMOTING TOURISM INVESTMENT IN THE REGION	Promote the IGAD region as an attractive investment destination for tourism investors	Prepare a joint Tourism Investment Promotion Strategy for the IGAD Member States
		Promote opportunities for tourism investment in the region
PRIORITY AREA 5: TOURISM HUMAN RESOURCE DEVELOPMENT	**Overall Strategic Objective:** To guarantee that each IGAD Member State has adequate and qualified human resource at all levels of the tourism sector, including business operations and management, destination policy, development and management, as well as research and academia.	
	Sub-objective 1: Bridge the short-term HR needs for the tourism sector.	Formulate and implement a short-term HR Development Strategy for the tourism industry IGAD Region
		Promote intra-regional labour mobility to bridge the short-term HR deficit in the Member countries
		Establish intra-regional apprenticeship programme
	Sub-objective 2: Develop Sustainable supply of globally competitive human resource for the tourism sector in IGAD	Harmonize tourism training and certification amongst IGAD Member States
		Establish centres of excellence in tourism training across the region





PRIORITY AREA	STRATEGIC OBJECTIVES	STRATEGIC ACTIONS
PRIORITY AREA 6: INTRA-REGIONAL MOVEMENT OF PERSONS, GOODS AND SERVICES IN THE TOURISM SECTOR	To facilitate unhindered movement of persons, goods and services within the tourism sector within the IGAD region.	Adopt favourable visa regimes
		Review and align air transport policies with tourism development strategy
		Promote uptake of the IGAD Protocol of Free Movement of Persons
		Ensure safe passage across all trans frontier highways
		Promote intra-regional trade in goods and services required for the tourism sector across its value chain.
PRIORITY AREA 7: INFORMATION, KNOWLEDGE AND EXPERIENCE SHARING	To facilitate sharing of information, knowledge and experiences among IGAD Members States for tourism development	Establish an integrated tourism statistics system at regional level
		Establish a regional framework for sharing experiences in tourism development
PRIORITY AREA 8: FORMULATE A TOURISM DEVELOPMENT GUIDE	Strategic Objective: Provide the IGAD region with a tourism development framework to enable harmonized planning and development.	Develop a tourism development guide to enable harmonized planning and development of the sector.
PRIORITY AREA 9: TOURISM DEVELOPMENT FINANCING	Ensure sustainable financing of the IGAD STMP 2024-2034	Estimate the resource requirements for each STMP 2024-2034 Priority Programmes
		Map potential sources of financing for each priority areas
		Implement resource mobilization strategies

STMP IMPLEMENTATION AND MONITORING FRAMEWORK

The STMP 2024-2034 provides a 10-year implementation matrix divided into three phases, a monitoring and evaluation framework, and an institutional arrangement specifying the roles and responsibilities of various institutions involved in implementing this regional framework.

ESTIMATED BUDGET

The estimated cost of implementing the STMP is USD 97,100,000, which includes provisions for Monitoring and Evaluation. This amount is distributed as below

	PRIORITY AREA	EST. BUDGET ('000 USD)
1	Trans-Boundary Tourist Products	50,200
2	Regional Tourism Quality Standards	8,200
3	Tourism Promotion and Marketing	8,500
4	Promotion of Tourism Investment in The Region	8,100
5	Tourism Human Resource Development	10,000
6	Intra-Regional Movement of Persons, Goods and Services in the Tourism Sector	9,500
7	Information, Knowledge and Experience Sharing	700
8	Formulation of a Tourism Development Guide	100
9	Tourism Development Financing	1,500
10	Monitoring and Evaluation:	
	a) End of Mid Term Implementation (2)	200
	b) End Term Evaluation	100
	TOTAL	**97'100**



TABLE OF CONTENTS

STMP 2024-2034 d

FOREWORD 1

EXECUTIVE SUMMARY 4

LIST OF ACRONYMS AND ABBREVIATIONS 14

1 INTRODUCTION 17

1.1 Background 18

1.2 Overview of Tourism Trends in the IGAD region 19

1.2.1 Global overview 19

1.3. Regional tourism trends in the IGAD region 21

2 IGAD REGION TOURISM COMPETITIVENESS DIAGNOSTICS 25

2.1 Introduction 26

2.1.1 Enabling Environment 26

2.1.2 Business Environment: 26

2.1.3 Safety and Security 27

2.1.4 Health and Hygiene 28

2.1.5 Human Resources and Labour Market 29

2.1.6 ICT Readiness 30

2.2. Prioritization of travel and tourism 31

2.2.1 International openness 32

2.2.2 Price competitiveness 36

2.3 Infrastructure 37

2.3.1 Air Transport Infrastructure 38

2.3.2 Road Infrastructure 39

2.3.3 Tourist Service Infrastructure 40

2.4 Travel and Tourism Demand Drivers 42

2.4.1 Natural resources and Cultural Resources 42

2.4.2 Non-Leisure Resources 44

2.5 Travel and Tourism Sustainability 45

2.5.1 Environmental Sustainability 45

2.5.2 Socio-economic Resilience and Conditions 46

2.5.3 Travel and Tourism Demand Pressure and Impact 47

2.6 SUMMARY OF SWOT ANALYSIS 48

2.7 Summary of strategic issues for the IGAD STMP 2024-2034 50

3 THE IGAD SUSTAINABLE TOURISM MASTER PLAN 2024-2034 55

3.1 RATIONALE FOR THE IGAD STMP 2024-2034 56

3.2 PROCESS OF PREPARING THE STMP 2024-2034 56

3.3 UNDERPINNING REGIONAL AND GLOBAL DEVELOPMENT FRAMEWORKS 57

3.3 BUILDING ON THE STMP 2013-2023 63

3.4 VISION OF THE IGAD STMP 2024-2034 66

3.5 AIM AND OBJECTIVES OF THE IGAD STMP 2024-2034 66

3.6 GUIDING PRINCIPLES OF THE STMP 2024-2034 67

3.7 IGAD STMP 2024-2034 STRATEGIC DIRECTION 68

PRIORITY AREA 1: DEVELOPMENT OF TRANS-BOUNDARY TOURIST PRODUCTS 70

PRIORITY AREA 2: REGIONAL TOURISM QUALITY STANDARDS 72

PRIORITY AREA 3: TOURISM PROMOTION AND MARKETING 74

PRIORITY AREA 4: PROMOTING TOURISM INVESTMENT IN THE REGION 76

PRIORITY AREA 5: TOURISM HUMAN RESOURCE DEVELOPMENT 78

PRIORITY AREA 6: INTRA-REGIONAL MOVEMENT OF PERSONS, GOODS AND SERVICES IN THE TOURISM SECTOR 82

PRIORITY AREA 7: INFORMATION, KNOWLEDGE AND EXPERIENCE SHARING 86

PRIORITY AREA 8: FORMULATE A TOURISM PLANNING AND DEVELOPMENT GUIDE 88

PRIORITY AREA 9: TOURISM DEVELOPMENT FINANCING 90

4 STMP 2024-2034 IMPLEMENTATION FRAMEWORK 93

4.1 Introduction 94

4.2 STMP 2024-2034: IMPLEMENTATION FRAMEWORK 95

5 MONITORING AND EVALUATION FRAMEWORK 101

5.1 Introduction 102

6 INSTITUTIONAL ARRANGEMENT FOR THE IMPLEMENTATION OF STMP 2024-2034 105

BIBLIOGRAPHY 110

APPENDIX LIST OF ORGANIZATIONS CONSULTED 112



LIST OF FIGURES

Figure 1.1: IGAD Member States Economic Growth- % Rate of Change of Real GDP	18
Figure 1.2: Global International Tourist Arrivals (Millions)	19
Figure 1.3: Global International Tourism Receipts 2012-2023 (USD Billions)	20
Figure 1.4: Global Tourism Recovery from COVID-19 (Change over 2019 percentage)	21
Figure 1.5: Contribution of Tourism to the GDP of IGAD Member States (Revenue % of GDP)	22
Figure 1.6: Tourism Arrivals Trends 2013-2022 ('000)	22
Figure 1.7: International Tourism Receipts Trends for IGAD Countries 2013-2022 (USD Billion)	23
Figure 2.1: IGAD Region Ease of Doing Business	27
Figure 2.2: Political Stability Index of IGAD Countries	28
Figure 2.3: Broadband Internet Subscribers ('000)	31
Figure 2.4: Prioritization of Tourism for IGAD Member States (Compared against World median)	32
Figure 2.5: IGAD Member States International Openness ranking	33
Figure 2.6: Financial Openness trend for IGAD Member States (Index points)	34
Figure 2.7: IGAD Visa openness Index	36
Figure 2.8: Price Competitiveness in the IGAD Region	37
Figure 2.9: Ranking for Air Transport Infrastructure Quality in IGAD Member States	39
Figure 2.10: Quality of Road Infrastructure for IGAD Member States	40
Figure 2.11: IGAD Member States Ranking for Quality of Tourism Infrastructure	41
Figure 2.13: IGAD Member States cultural and Natural Resources ranking	44
Figure 3.1: IGAD STMP 2024-2034 Strategic Framework	68
Figure 6.1 STMP 2024-2034 Institutional Framework	106

LIST OF TABLES

Table 2.1: IGAD Health Indicators	29
Table 2.2: IGAD Member States BASAs (2024)	35
Table 2.12: Hotel Chain Development Pipelines in Africa 2024 Countries with Hotel Chain Pipeline Deals	42
Table 5.1: STMP 2024-2034 Monitoring and Evaluation Plan	102





LIST OF ACRONYMS AND ABBREVIATIONS

AfCFTA	African Continental Free Trade Area
AfDB	African Development Bank
AIGF	Afghanistan Investment Guarantee Facility
ASEAN	Association of Southeast Asian Nations
AU	African Union
AUC	African Union Commission
AVOI	African Visa Openness Index
CCSTP	Common Competency Standards for Tourism Professionals
CEWARN	Conflict Early Warning and Response Mechanism
COMESA	Common Market for Eastern and Southern Africa
COVID	Corona Virus Disease
DMO	Destination Management Organization
DMS	Destination Management Systems
DRM	Domestic Resource Mobilization
EAC	East African Community
ETA	Electronic Travel Authorization
EU	European Union
FDI	Foreign Direct Investment
FTYIP	First Ten-Year Implementation Plan
GDP	Gross Domestic Product
GHACOF	Greater Horn of Africa Climate Outlook Forum Climate Prediction
HIV	Human Immunodeficiency Virus
HR	Human Resource
ICPAC	IGAD Climate Prediction and Applications Centre
ICT	Information and Communication Technology
IGAD	Inter-governmental Authority on Development
ILO	The International Labour Organisation
IPoA	Implementation Plan of Action
KUC	Kenya Utalii College
LAPSSET	Lamu Port-South Sudan-Ethiopia-Transport
MICE	Meetings Incentives Conferences and Exhibitions
NEPAD	New Partnership for Africa's Development
NGO	Non-Governmental Organisation
NMR	Neonatal Mortality Rate
NTOs	National Tourism Organisations
NTPBs	National Tourism Professional Boards
OVIs	Objectively Verifiable Indicators
PAP	Priority Action Plan
PIDA	Programme for Infrastructure Development in Africa
SAATM	Single African Air Transport Market
SADC	Southern Africa Development Community
SRO-EA	Sub-Regional Office for Eastern Africa
STMP	Sustainable Tourism Master Plan
THRPMC	Tourism Human Resource Professional Monitoring Committee
ToT	Training of Trainers
TPSA	Tourism Private Sector Alliance
TRM&EC	Tourism Resourcing, Monitoring and Evaluation Committee
TSA	Tourism Satellite Account
TTCI	Travel and Tourism Competitiveness Index
TVET	Technical and Vocational Education and Training
UNECA	United Nations Economic Commission for Africa
UNESCO	United Nations Educational Scientific and Cultural Organisation
UNWTO	United Nations World Tourism Organisation
USD	United States Dollar

01

Introduction



INTRODUCTION

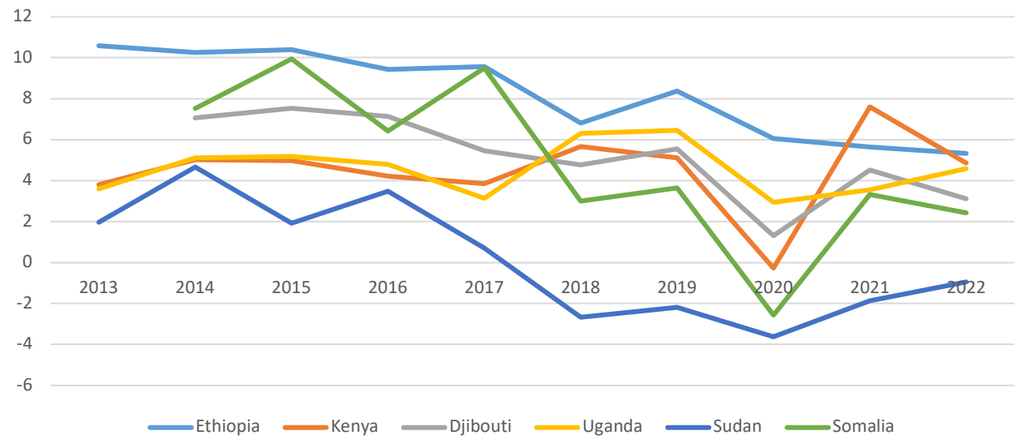
1.1 BACKGROUND

The Intergovernmental Authority on Development (IGAD) region comprises eight countries: Djibouti, Eritrea, Ethiopia, Kenya, Somalia, South Sudan, Sudan and Uganda.

The region is characterized by a diverse and dynamic economy encompassing a wide range of sectors, including agriculture, energy, trade, and tourism. As a regional economic community in the Eastern Africa region, IGAD Member States work together to promote sustainable economic growth, improve infrastructure, and foster cooperation in various economic activities. The region's economy is also influenced by factors such as natural resource endowments, economic policies, and regional integration efforts, all of which contribute to shaping the economic landscape of the IGAD countries.

As illustrated in the Figure 1.1 below, which depicts the economic performance of IGAD Member States from 2013 to 2022, the region demonstrates varying growth rates in real GDP among its Member States. Notably, while some countries experienced consistent growth over the years, others encountered periods of fluctuation and even negative growth. These fluctuations may be attributed to various factors such as political instability, economic policies, and external influences. It's evident that the economic landscape of the region is diverse and complex. The figure below shows a trend in economic growth for IGAD region 2013-2023.

FIGURE 1.1: **IGAD Member States Economic Growth- % Rate of Change of Real GDP**



Source: World Bank Database (2013-2023)

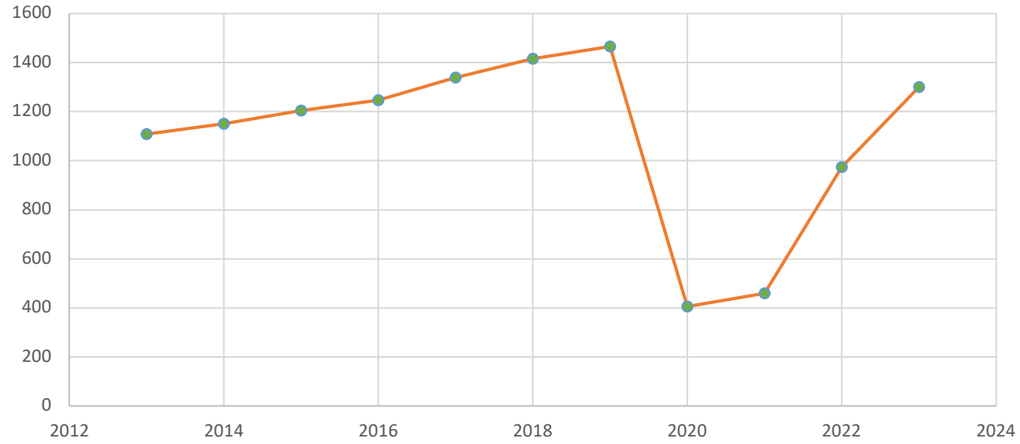
1.2 OVERVIEW OF TOURISM TRENDS IN THE IGAD REGION

1.2.1 Global overview

Despite occasional shocks, international tourism has demonstrated high levels of resilience, quickly rebounding after major global setbacks. For instance, prior to COVID-19, international tourism arrivals were on an upward trajectory, rising from 1108.58 million international tourist arrivals in 2013, steadily increasing annually to reach 1464.65 million arrivals in 2019. The industry however experienced a significant decline in 2020 with only 406.3 million arrivals, due to the impact of the global COVID-19 pandemic on international travel.

The figures started to recover in 2021, reaching 459.38 million arrivals, and then showed a dramatic increase in 2022 to 974.69 million, indicating a strong rebound in international tourism. This positive trend continued into 2023, with 1300.11 million arrivals.

FIGURE 1.2: **Global International Tourist Arrivals (Millions)**



Source: UNWTO database, 2012- 2024

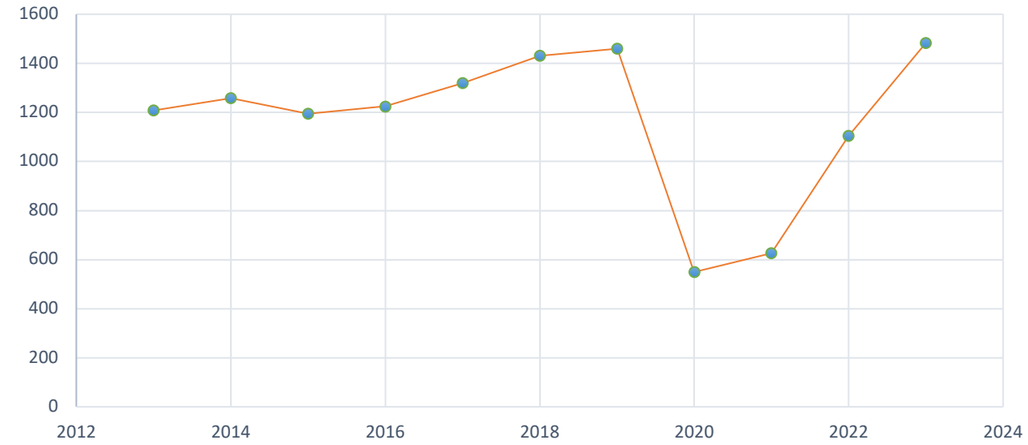
International Tourism Receipts

The international tourism receipts trend chart shows the revenue generated by international tourism globally from 2013 to 2019. However, there was a significant drop in 2020, with receipts dropping to USD 549.2 billion compared to USD 1.5 trillion in 2019, due to the impact of the COVID-19 pandemic on global travel. The



figures started to recover in 2021, reaching USD 626.9 billion, and continued to increase in the following years, reaching USD 1482.5 billion in 2023. This recovery suggests a positive trend in international tourism receipts following the challenges faced in 2020.

FIGURE 1.3: **Global International Tourism Receipts 2012-2023 (USD Billions)**

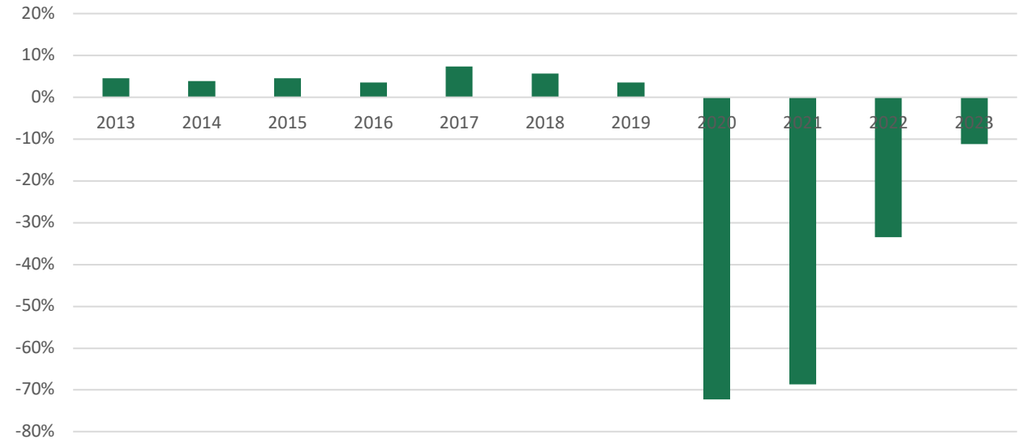


Source: UNWTO database, 2012- 2024

Global recovery of the tourism industry from COVID-19 impact

As indicated above, the global tourism industry experienced a significant downturn in 2020, with a sharp decline recording a percentage change of -72.30 per cent, compared to 2019. However, the trend chart below indicates signs of recovery as the industry begun to rebound significantly in 2022 and 2023, with percentage changes of -11.20 per cent from 2019. This suggests a gradual improvement in the global tourism sector, indicating a positive trajectory for the industry. The recovery highlights the resilience of tourism sector and the gradual overcoming of the unprecedented challenges posed by the pandemic. It also signifies renewed confidence among travellers in international tourism.

FIGURE 1.4: **Global Tourism Recovery from COVID-19 (Change over 2019 percentage)**



Source: UNWTO database, 2012-2024

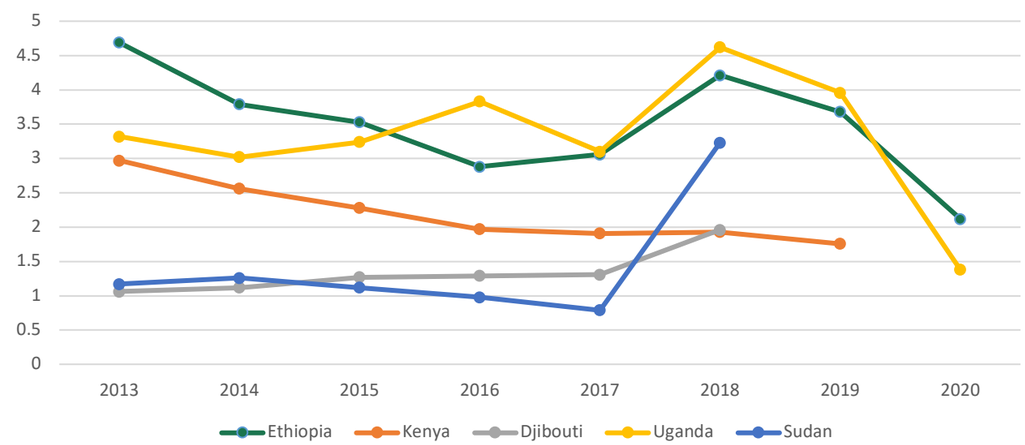
1.3. REGIONAL TOURISM TRENDS IN THE IGAD REGION

The IGAD region is rich with diverse tourism resources with each country offering unique tourism experiences, ranging from ancient archaeological sites and vibrant cultural festivals to diverse wildlife and stunning landscapes. The diverse offerings in the region make it a compelling destination for travellers seeking authentic cultural experiences, adventure, and natural beauty. As the region further develops its tourism infrastructure and promotes cross-border initiatives, it is poised to become an increasingly sought-after destination for global travellers.

With such resource base, the tourism industry has remained a key economic pillar for the majority of the Member States making a significant contribution to the GDP and employment generation as attested in the figure that shows the contribution of tourism to the GDP of different IGAD Member States from 2013-2020.



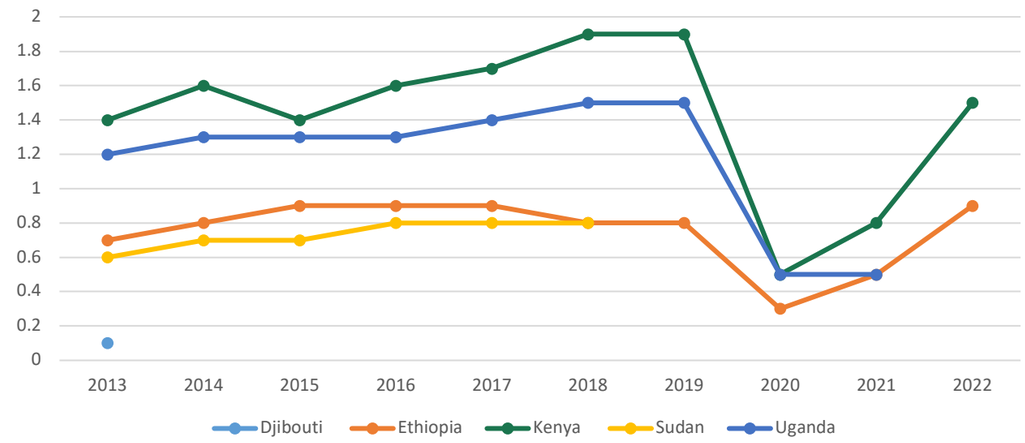
FIGURE 1.5: **Contribution of Tourism to the GDP of IGAD Member States (Revenue % of GDP)**



Source: World bank Database, 2013-2024

Nonetheless, the region has over the years recorded varying trends in international tourism arrivals for the Member States as can be seen in the figure below.

FIGURE 1.6: **Tourism Arrivals Trends 2013-2022 ('000)**



Source: UNWTO Database, 2013-2024

It is notable that Ethiopia and Kenya experienced consistent growth in international tourist arrivals from 2013 to 2019 while the numbers of Djibouti and Sudan have fluctuated over the years. There is a significant decline in 2020, which can be attributed to the impacts of COVID- 19 in the region. However, the region is undergoing recovery and notable increase in numbers from the 2020 can be seen.

In terms of tourism receipts, average annual international tourism receipts for IGAD Member States from 2013 to 2023 has fluctuated during this period. On a country-level, there was a notable increase in tourism receipts for Ethiopia, Uganda and Kenya between 2018-2018, and a massive drop in 2020 due to COVID-19. The region is however, gradually recovering with the tourism revenues increasing as the number of tourism arrivals increase.

FIGURE 1.7: **International Tourism Receipts Trends for IGAD Countries 2013-2022 (USD Billion)**

Source: World Bank Database, 2013-2024

O_2

IGAD Region

Tourism Competitiveness Diagnostics



2.1 INTRODUCTION

As noted, tourism continues to be a priority sector in virtually all the IGAD Member States. This fact notwithstanding, it is important to diagnose the state of competitiveness of the tourism sector within the region with a view to identifying areas of intervention. This diagnostic report is presented below.

2.1.1 Enabling Environment

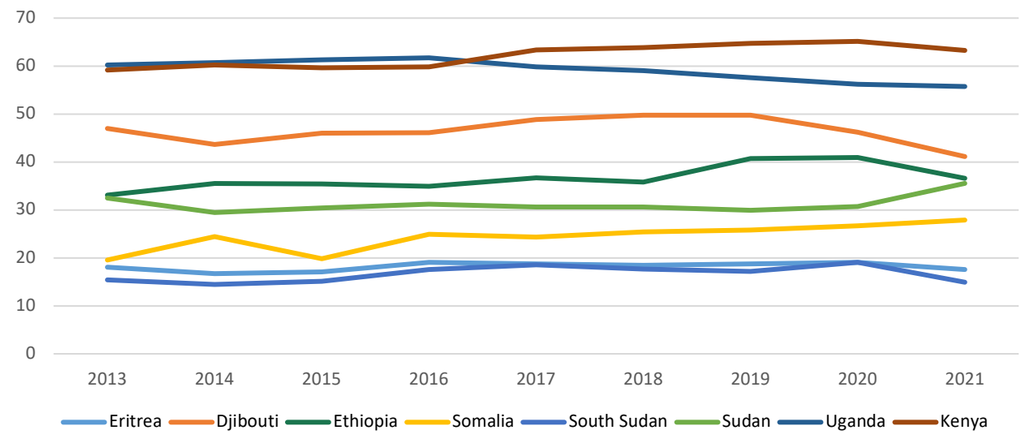
The enabling environment is a crucial factor in determining the competitiveness of the tourism industry in the IGAD region. This includes political stability, safety and security, and ease of doing business. Each country within the region has its unique enabling environment, and some have made significant progress in improving their business environment, such as Kenya. However, other countries, such as Somalia, are still facing political instability and security challenges. According to the African Development Bank, Kenya has made significant progress in improving political stability, safety and security, and the ease of doing business[1]

The enabling environment for tourism development in the IGAD region varies widely. Countries like Uganda and Ethiopia benefit from relative political stability and peace, which positively affects tourism. Conversely, nations such as Somalia and South Sudan are still grappling with political instability and insecurity, which hinder tourism growth. This disparity underscores the need for countries in the region to work together to promote peace and security, fostering a favourable environment for tourism development. For instance, Ethiopia's significant strides in promoting peace and security in the region have contributed to the growth of its tourism sector.

2.1.2 Business Environment:

Business environment captures the extent to which a country's policy environment is conducive to commercial activities. According to the World Bank, an economy's ease of doing business score is measured on a scale from zero to 100, where zero represents the lowest performance and 100 represents the best. The figure below illustrates the ease of doing business for IGAD Member States. As of 2021, Kenya ranked top among IGAD Member States with a score of 63.2, followed by Uganda with a score of 55.7. Eritrea and South Sudan are ranked last, with scores of 17.6 and 14.9 respectively.[2]

FIGURE 2.1: **IGAD Region Ease of Doing Business**



Source: World Bank Database, 2013- 2024

2.1.3 Safety and Security

Safety and security are critical factors in determining the success of a country's travel and Tourism sector. More than any other economic activity, the success or failure of a tourist destination depends on its ability to provide a safe and secure environment for visitors. Governance based on the rule of law can significantly lower political risk, thereby enhancing stability, which is crucial for attracting investment.

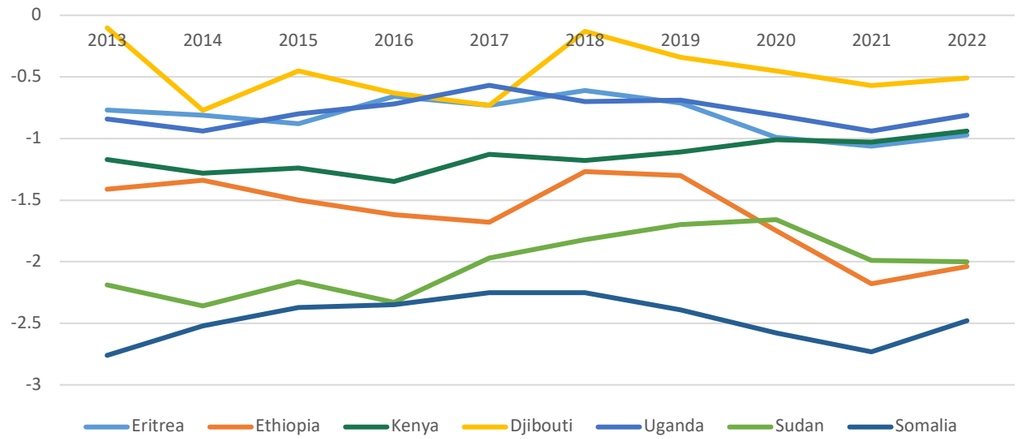
The IGAD region is generally regarded as highly volatile and risky in terms of safety and security. As presented in the Figure 2.2 below, the Political Stability Index, countries like Sudan and Somalia have experienced significant political instability and social unrest in recent years, leading to a low political risk score. On the other hand, Djibouti has maintained a relatively stable government and a strong rule of law, leading to a higher political risk score. However, it is important to note that the overall stability of IGAD Member States improved as of 2022.

1 African Development Bank. (2019). Kenya Economic Outlook

2 https://prosperitydata360.worldbank.org/en/indicator/QOG+BD+iiag_be



FIGURE 2.2: **Political Stability Index of IGAD Countries**



Source: World Bank[3]

2.1.4 Health and Hygiene

Healthcare infrastructure, accessibility and health security plays a key role in the success of the tourism industry boosting the traveller's confidence in a destination. COVID-19 demonstrated how important a country's healthcare system is when it comes to mitigating the impact of pandemics and ensuring safe travel conditions, and workforce availability and resilience. Generally, if tourists or sector employees do become ill, the country's health sector must be able to ensure that they are properly cared for, as measured by the availability of and access to physicians, hospital beds and general healthcare services. Moreover, access to safe drinking water and sanitation is important for the comfort and health of travellers and locals alike.

Most IGAD Member States are low-middle-income countries with low health service coverage, and high mortality and morbidity rates. The health burden within the IGAD region disproportionately manifests across the countries. For instance, South Sudan, recorded the region's highest neonatal mortality rate (NMR) of 40 in 2020 and the highest HIV incidence of 1.37 in 2020. Somalia ranked second in NMR and TB incidence, recording 37 per 1,000 live births and 259 per 100,000 populations, respectively.

3 https://databank.worldbank.org/source/worldwide-governance-indicators/Series/PV.EST

TABLE 2.1: **IGAD Health Indicators**

Country	Neonatal mortality rate, 2020 (Per 1,000 live births)	Incidence of HIV per 1,000 uninfected adults, 2020	Tuberculosis incidence per 100,000 population, 2020	Universal Health Coverage Index, 2019 (0-100)	Share of children who have had two doses of the measles vaccine (MCV2), 202157
Djibouti	30	0.13	224	48	48
Eritrea	18	0.07	81	50	85
Ethiopia	27	0.12	132	38	46
Kenya	20	0.72	259	56	57
Somalia	37	0.02	259	27	-
South Sudan	40	1.37	232	32	-
Sudan	27	0.09	63	44	63
Uganda	19	0.95	196	50	-

Source: IGAD Annual Report, 2022

2.1.5 Human Resources and Labour Market

High-quality human resources in an economy ensure that the sector has access to the collaborators it needs. The prevailing literacy rates and by extension, numeracy skills are critical to the formation of human capital in any given industry or economy. In this regard, though changing, the persistently low literacy and numeracy rates in the IGAD region can be regarded as a major obstacle for tourism development as the success of the industry is heavily dependent upon the availability of relevant skills and knowledge. Human resources is an important factor that affect the competitiveness of the tourism industry.

Unfortunately, the IGAD region still faces significant challenges in this regard, with many countries lacking the necessary skills and training programmes to develop a competent and professional workforce. Addressing this challenge requires a coordinated effort between governments, the private sector, and educational institutions. Nonetheless, individual countries have initiated measures to address this challenge. For example, Ethiopia has a large and growing tourism industry, but it faces challenges in terms of skilled labour and workforce development. To address these challenges, the Ethiopian government has launched various initiatives to develop the skills of the tourism workforce, including training programmes and vocational education.[4]

4 Ethiopian Tourism Organization (2021).



Similarly, South Sudan has a nascent tourism industry, and it faces challenges in terms of developing a skilled workforce. To address these challenges, the government has launched various initiatives to promote education and vocational training[5]. It is informative to note that the IGAD region has had an aspiration of a coordinated regional action plan to address the human resource deficiency for the tourism sector as espoused in the STMP 2013-2023.

2.1.6 ICT Readiness

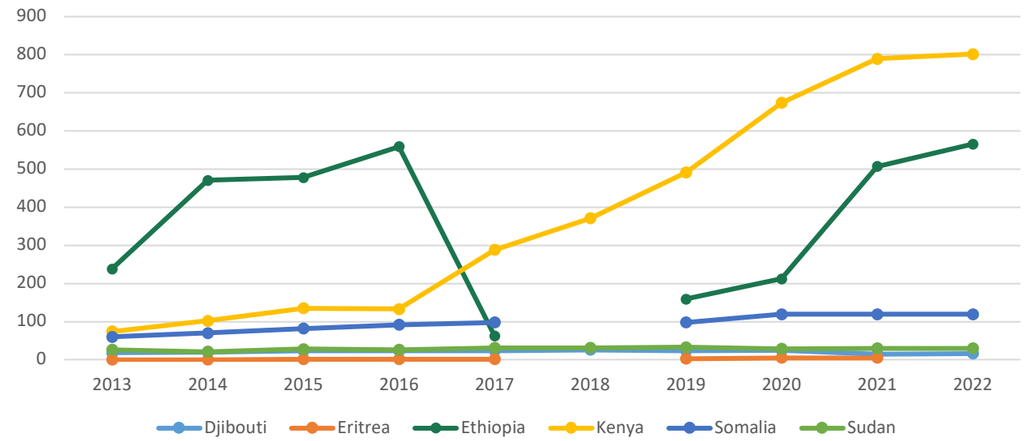
The significance of ICT in the tourism industry cannot be overstated given the increasing importance of the online environment for the distribution and promotion of the travel and tourism products. ICT infrastructure encompasses penetration rates through the internet, telephone lines and broadband, which provide a sense of the society's online activity. It also includes a specific measure of the extent to which the internet is used by businesses in carrying out transactions in the economy.

Access to good technology not only raises tourism competitiveness by increasing attractiveness of the destination as a comfortable destination to high-end tourists but also raises the attractiveness of the destination as an investment location for tourism investors whose capital finances supply expansion in the tourism sector.

Figure 2.3 shows the number of broadband internet subscribers, in thousands, for various countries in East Africa from 2013 to 2022. Over the years, Ethiopia and Kenya have consistently shown steady growth in broadband internet subscribers, with both countries experiencing significant increases from 2013 to 2022. Ethiopia's subscriber count grew from 238 thousand in 2013 to 566 thousand in 2022, while Kenya's count grew from 74 thousand to 801 thousand during the same period. Other countries, such as Djibouti, Eritrea, Somalia, and Sudan, also witnessed varying degrees of growth in their subscriber numbers, despite fluctuations in some years.

5 South Sudan Ministry of Tourism, Wildlife and Antiquities (2021).

FIGURE 2.3: **Broadband Internet Subscribers ('000)**



Source: International Telecommunication Union

2.2. PRIORITIZATION OF TRAVEL AND TOURISM

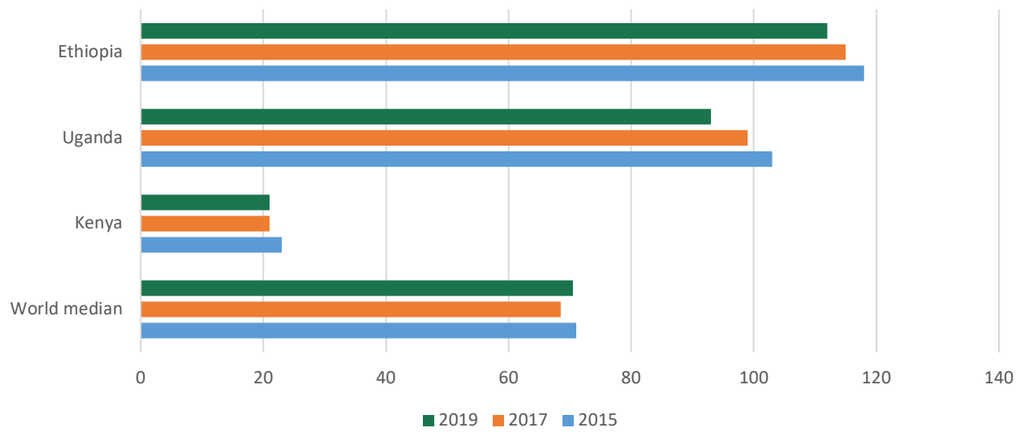
Prioritization involves the development of policies and strategies that focus on tourism as a key driver of economic growth. Within the IGAD region, there is a growing recognition of tourism as a significant driver of economic growth and development. While each member state has its own priorities, there is an increasing trend towards regional cooperation to promote tourism. Key priorities include improving infrastructure – such as roads, airports, and railways – to enhance connectivity, collaborative marketing efforts to promote the region as a tourist destination, and streamlining visa procedures and regulations.

Other priorities include diversifying tourism products, investing in human capital through training programmes, engaging local communities in tourism development, and promoting sustainable tourism practices. In Ethiopia for instance, the country's ten-year Tourism Master Plan (2015-2025) demonstrates the government prioritization of the tourism sector, focusing on the development of new tourist destinations, improving the quality of tourism services, and creating a favourable investment climate for the private sector to invest in the tourism industry.

Figure 2.4 below indicates the IGAD Member States ranking based on the prioritization for tourism compared to the World Median between 2015 and 2019. Kenya consistently ranked highest, ranking at 21st position in 2019 followed by Uganda at 93rd position and Ethiopia came third at 112th position. Kenya, Uganda and Ethiopia have demonstrated a steady improvement in prioritizing tourism.



FIGURE 2.4: **Prioritization of Tourism for IGAD Member States (Compared against World median)**



Source: World Economic Forum

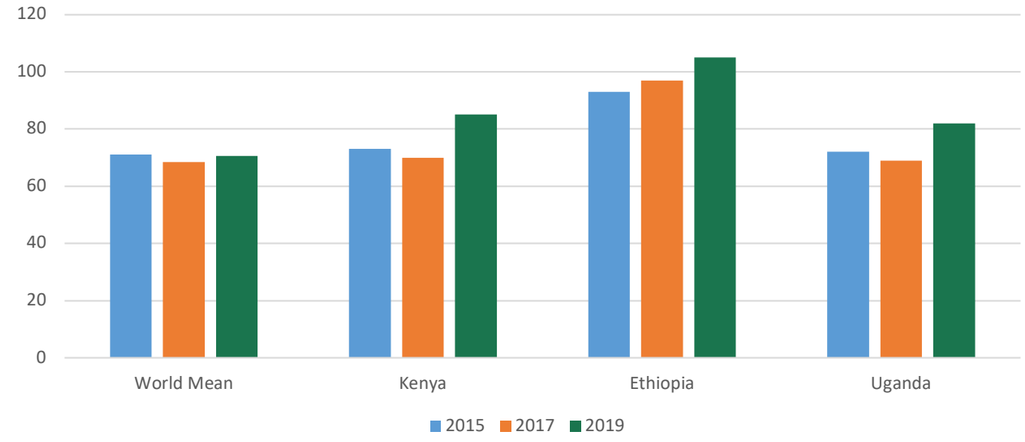
Through these efforts, IGAD Member States aim to leverage tourism for economic growth, job creation, poverty reduction, and regional integration.

2.2.1 International openness

Developing the tourism sector internationally requires a certain degree of openness and travel facilitation. International openness involves factors such as the number of bilateral air service agreements a government has entered into, which affects the availability of air connections to the country; and the number of regional trade agreements in force, which indicates the extent to which it is possible to provide world-class tourism services.

Figure 2.5 below shows the ranking of IGAD Member States against the World Median for international openness as provided by World Economic Forum Tourism and Travel Competitive Index 2015-2019. Uganda was ranked 82nd position in 2019, Kenya 85th position and Ethiopia ranked third among the IGAD Member States at 105th position.

FIGURE 2.5: **IGAD Member States International Openness ranking**



Source: World Economic Forum

Other parameters used to assess the level of International Openness for IGAD Member States include financial openness, bilateral air agreements, and Visa openness Index.

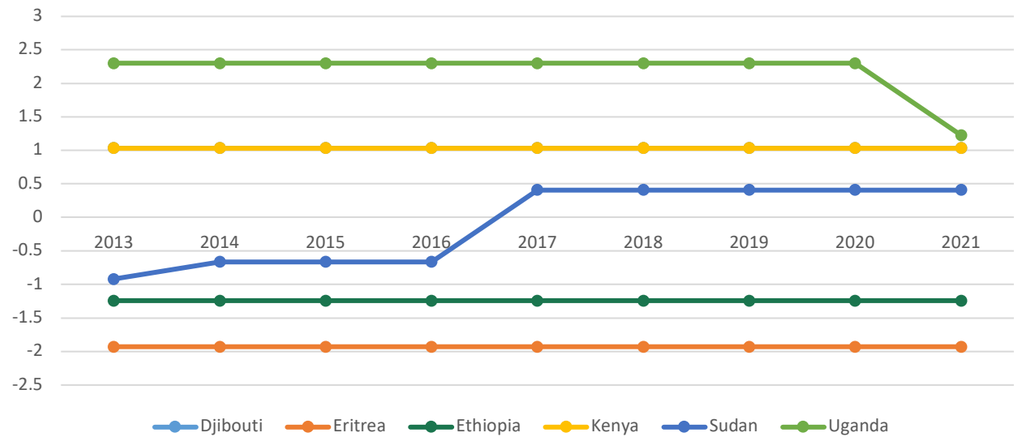
a) Financial Openness

Financial openness, measured as the free flow of capital, is important for cross-border trade and investment in travel and tourism services. The index measures the degree of openness of a country's financial sector to international trade and investment. Positive values indicate a high degree of financial openness, while negative values suggest a more closed financial sector.

As observed, Uganda and Kenya have consistently posted positive scores since 2013, indicating a relatively high level of financial openness. On the other hand, Eritrea and Ethiopia have consistently reported negative scores, suggesting a more closed financial sector.



FIGURE 2.6: **Financial Openness trend for IGAD Member States (Index points)**



Source: Chinn-Ito Index[6]

b) Bilateral air service agreements

Key to promoting the tourism industry is international air service openness. Bilateral air service agreements define the level and extent of collaboration between countries - in terms of routes airlines can operate, the cities that can be served within, between and beyond the bilateral partners, the number of flights that can be operated or passengers that can be carried between the bilateral partners, the number of airlines the bilateral partners can nominate to operate services and the ownership criteria airlines must meet to be designated under the bilateral agreement. In this regard, the IGAD region remains relative non-competitive despite of existence in majority of Member States of tourism policies, plans and strategies that would essentially entail integration of international air travel facilitation. The data below shows the number of Bilateral Air Service Agreement (BASAs) among IGAD Member States as of July 2024.

6 The Chinn-Ito index (KAOPEN) is an index measuring a country's degree of capital account openness (https://knoema.com/NBERCIFOI2017/the-chinn-ito-financial-openness-index)

TABLE 2.2: **IGAD Member States BASAs (2024)**

RANK	MEMBER STATE	NO. OF BASAS
	Kenya	31
	Ethiopia	22
	Uganda	14
	Sudan	14
	Somalia	4
	Djibouti	4
	South Sudan	2
	Eritrea	0

Source: ICAO World Air Services Agreements

Further, out of the 34[7] African countries that have signed the Single African Air Transport Market (SAATM), only two IGAD Member States have done so, i.e. Kenya and Ethiopia. It is informative to note that SAATM is aimed towards creating a single unified air transport market in Africa, liberalize civil aviation and drive the continent's economic integration agenda, and by extension, boosting intra-Africa trade and tourism as a result.

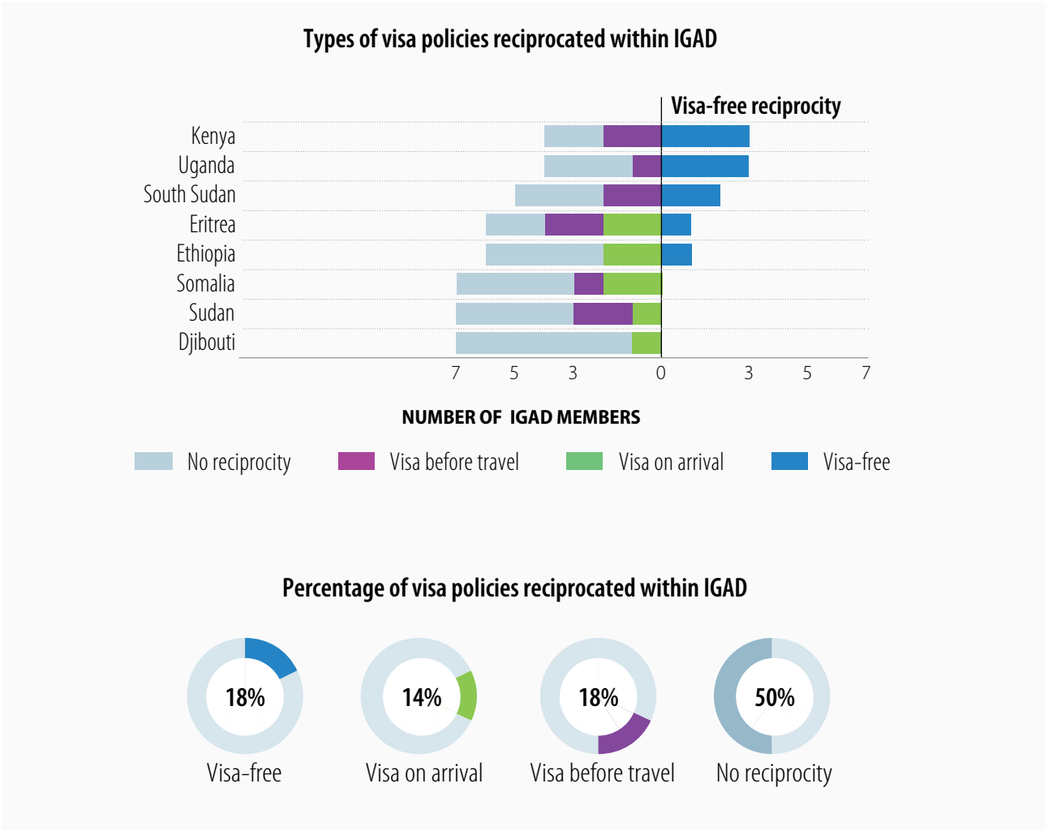
c) Visa Openness Index

The IGAD region continues to be one of the least open regions in Africa. As per the African Visa Openness Index (AVOI), the region ranked sixth out of the eight Regional Economic Communities in 2023. According to AVOI'S score rankings, Djibouti, Somali and Ethiopia were ranked among the top 20 in the Average ranking. Kenya, Uganda, South Sudan, Eritrea and Sudan were ranked below the IGAD average of 0.411 in terms of their Visa Openness performance.

7 Source: IATA Data



FIGURE 2.7: **IGAD Visa openness Index**

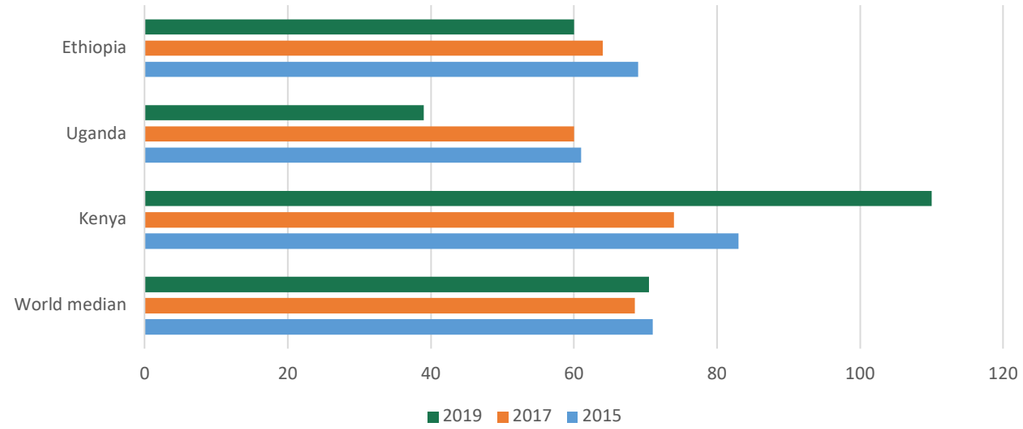


Source: African Development Bank Group (2023)

2.2.2 Price competitiveness

Price competitiveness demonstrates how costly it is to travel or invest in a country. Lower costs related to travel in a country increase its attractiveness for many travellers as well as making its tourism sector more appealing to investors. Price competitiveness ideally denotes a country's ability to offer competitive prices for tourism services. When price competitiveness ranking is compared against World median, Uganda was ranked first among the IGAD Member States in 2019 at 39th position an improvement from 60th position in 2017. In the same year 2019, Ethiopia ranked 60th position and Kenya came third at 110th position. This means that among the IGAD member systems Uganda has the highest price competitiveness for tourism followed by Ethiopia.

FIGURE 2.8: **Price Competitiveness in the IGAD Region**



Source: World Economic Forum Database

2.3 INFRASTRUCTURE

The infrastructure in the IGAD region is a crucial factor in determining the competitiveness of the tourism industry. Over the years, a number of Member States have made significant steps in improving the quality of infrastructure. For example, Djibouti has made significant progress in improving its infrastructure, including the construction of a new airport and seaport. It is important to note that IGAD Member States stand to benefit from the Programme for Infrastructure Development in Africa (PIDA), a strategic continental initiative aimed at addressing the infrastructure deficit in Africa focuses on regional infrastructure development to promote socio-economic development and integration across the continent.

In the IGAD region, the implementation of PIDA has involved the coordination of efforts to develop key infrastructure such as transport networks, energy, water, and ICT. This aims to improve connectivity and boost trade and economic growth within the IGAD Member States. The approval of construction of the LAPSSET railway for Ethiopia, Kenya and South Sudan, among other ongoing infrastructure projects, such as construction of roads, Fibre Optic cables and upgrading of border posts in IGAD Member States, are some of the ways the region is benefiting from the PIDA programme.



2.3.1 *Air Transport Infrastructure*

Air connectivity is essential for travellers' ease of access to and from countries, as well as movement within many countries. In this pillar, we measure international and domestic air route capacity and quality, using indicators such as available seat kilometres, the number of operating airlines and the efficiency of air transport services. The extent to which a country's airports are integrated into the global air transport network is also measured.

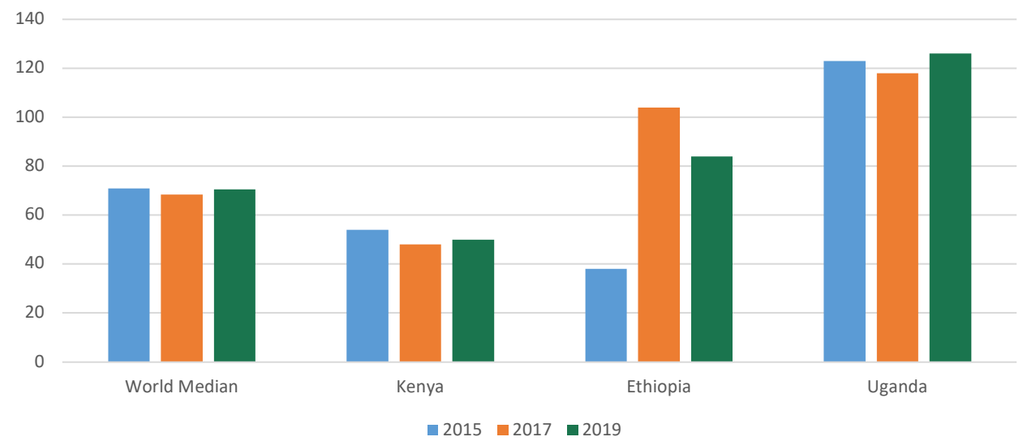
According to UNWTO, over 960 million tourists travelled internationally in 2022, more than doubled in 2021. IATA reported that airlines carried 3.4 billion passengers in 2022 compared to the 2.2 billion realized in 2021. Africa received 46.6 million international tourists, generating USD 31.6 billion. Airlines in the continent carried 67 million passengers, representing a 55.8 per cent growth compared to the previous year. In terms of capacity, the average Passenger Load Factor recorded in Africa for 2022 was 71.6 per cent, a 10.6 per cent increase compared to 2021. This is 7 per cent less than the global average.

The quality of air transport infrastructure is gauged based on several factors: the quantity of air transport, indicated by the available seat kilometres for both international and domestic flights, the number of departures, airport density, the number of operating airlines, the quality of the air transport infrastructure both for domestic and international flights and international air transport network The majority of tourists visit the IGAD region by air, and therefore, air transport infrastructure is crucial for the development of the tourism industry.

Ethiopia and Kenya have made significant investments in their air transport infrastructure, with modern airports and expanding fleets of commercial airlines. Ethiopia has invested heavily in its air transport infrastructure, with a state-of-the-art airport in Addis Ababa and a growing fleet of Ethiopian Airlines planes. This has helped to facilitate trade and tourism within the region and beyond.

According the World Economic Forum ranking against the World Median, Kenya ranked 50th in 2019 in terms of the quality of air transport infrastructure as shown in the figure below. Ethiopia ranked 84th position while Uganda ranked 126th in 2019[8].

FIGURE 2.9: **Ranking for Air Transport Infrastructure Quality in IGAD Member States**



Source: World Economic Forum

2.3.2 *Road Infrastructure*

Ground transport plays an important role in the tourism system of any given destination, complementing air transport by providing access to the various tourist activities and attractions. Road transport constitutes the most commonly utilised mode of ground transport in terms of facilitating access to and from destinations. Consequently, the quality of road transport and road density (measured in kilometres of road per 100 square kilometres of land) are key factors in destination competitiveness.

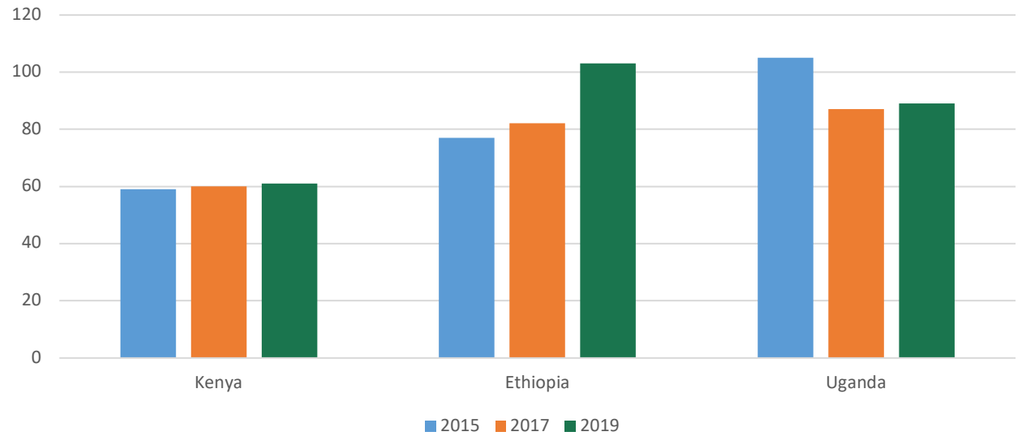
The figure below shows the ranking of IGAD Member States for the quality of Road transport infrastructure, based on the WEF 2023 data for the Tourism and Travel Competitiveness Index. The values are compared against the World Median. As of 2019, Kenya was ranked 61st position, Uganda 89th and Ethiopia 103rd.[9]

8 https://prosperitydata360.worldbank.org/en/indicator/WEF+TTCI+EOSQ061

9 https://prosperitydata360.worldbank.org/en/dataset/WEF+TTCI



FIGURE 2.10: **Quality of Road Infrastructure for IGAD Member States**



Source: World Economic Forum

The prevailing road conditions, densities and networks within IGAD Member States and the region as a whole are generally poor and inadequate, with better conditions confined to urban areas, mostly the capital cities. In terms cross-border road network, while there are roads connecting the Member States – such as the route from Djibouti to Assab in Eritrea and onward to Dikhil for access to Ethiopia, or part of the Trans-East African Highway linking Nairobi and Addis Ababa via Moyale – the condition of these roads is mostly substandard. Travel often requires the use of rugged vehicles.

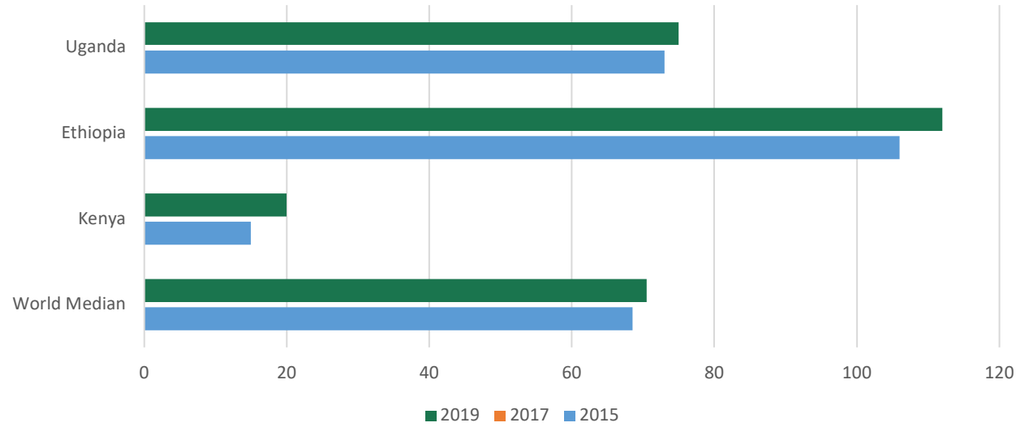
2.3.3 Tourist Service Infrastructure

The availability of sufficient accommodation, resort and leisure facilities can provide a significant advantage for IGAD tourism economy. The success of any tourism destination is dependent, to a large degree, on the quality of the facilities and services infrastructure available to the tourists. These can be categorized into

- Primary tourist facilities and services: Accommodation (hotels), restaurants, and travel and tour services.
- Secondary tourist facilities and services: Shopping, recreation, entertainment and visitor information services.
- Tertiary tourist facilities and services: Health services and care, emergency and safety services, financial services and personal services.

As shown in the figure 2.11, Tourism and Travel Competitiveness Index (TTCI) ranked Kenya 20th in terms of quality of tourism infrastructure in 2019, compared to the World Median. In the same year, Uganda was ranked 75th and Ethiopia 112th.

FIGURE 2.11: **IGAD Member States Ranking for Quality of Tourism Infrastructure**



Source: World Economic Forum

The tourism business environment in the IGAD region is expected to experience significant growth in the coming years, as evidenced by the hotel pipeline report for 2024. The report indicates that several new hotels and resorts are set to open in the region, which is expected to boost the tourism sector even further. One of the key drivers of this growth is the increasing interest in the region by international investors, who are attracted by the area's natural beauty, diverse cultural offerings, and growing infrastructure.

According to the Hotel Chain Development Pipeline report 2024 by the W Hospitality Group, East Africa, that hosts six of the IGAD Member States, ranks second in pipeline rooms, after West Africa, accounting 28 per cent of the total. In the overall ranking, Ethiopia is positioned fourth, while Kenya is ranked seventh. IGAD countries featured in the pipeline include Djibouti, Ethiopia, Kenya, South Sudan, Sudan and Uganda leaving out Eritrea and Somali as per Hotel Pipeline Report, 2024[10].

10 W-Hospitality Hotel Pipeline Report 2024.



TABLE 2.12: **Hotel Chain Development Pipelines in Africa 2024 Countries with Hotel Chain Pipeline Deals**

NORTH AFRICA	SOUTHERN AND INDIAN OCEAN	WEST AFRICA	EAST AFRICA	CENTRAL AFRICA
Algeria	Angola	Benin Congo	Djibouti	Cameroon
Egypt	Botswana	Burkina Faso	Ethiopia	Chad
Morocco	Madagascar	Cape Verde	Kenya	Congo
Tunisia	Malawi	Cote d'Ivoire	Rwanda	Democratic Republic of Congo
	Mauritius	Ghana	South Sudan	Gabon
	Malawi	Guinea	Tanzania	
	Mozambique	Liberia	Uganda	
	Namibia	Mauritania		
	Seychelles	Niger		
	South Africa	Nigeria		
	Zambia	Senegal		
	Zimbabwe	Sierra Leone		
		The Gambia		
		Togo		

Source: W Hospitality Group, 2024

In conclusion, the IGAD region has made progress in improving its infrastructure, particularly in air transport, ground and port infrastructure, and tourist service facilities. However, there remains room for improvement in these areas. Overall, the IGAD region has the potential to become a major tourism destination in the world, but it will require continued efforts to improve infrastructure and address the challenges facing the industry.

2.4 TRAVEL AND TOURISM DEMAND DRIVERS

Travel and tourism demand drivers in the IGAD region are diverse, with wildlife, historical sites, and beaches being the major attractions. However, to attract a broader range of tourists, countries in the region need to diversify their tourism products and services.

2.4.1 Natural resources and Cultural Resources

The natural resources are evaluated based on the landscape, natural parks, and the diversity of wildlife. Countries possessing rich natural resources are more likely to



attract tourists. The IGAD region is rich in natural and cultural tourism resources that make it an attractive destination for travellers from all over the world. These resources include diverse landscapes, wildlife, cultural heritage sites, and traditional practices. In terms of natural tourism resources, the IGAD region is home to a vast range of landscapes, from deserts and savannahs to mountain ranges and tropical forests. The region is also home to a variety of wildlife, including elephants, lions, giraffes, and many species of birds. These natural resources attract visitors who are interested in experiencing the natural beauty of the region.

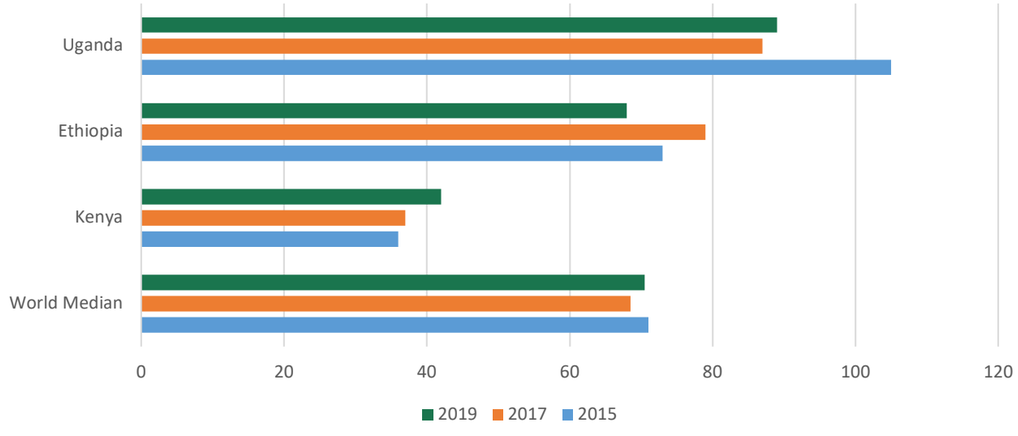
In addition to natural tourism resources, the IGAD region has a rich cultural heritage that is also a significant draw for visitors. The region is home to a diverse range of cultures, including the Maasai, Samburu, and Turkana in Kenya, the Oromo and Amhara in Ethiopia, and the Dinka and Nuer in South Sudan. These cultures have unique traditions, including music, dance, and storytelling, which provide visitors with a glimpse into the region's rich cultural heritage.

There are also numerous cultural heritage sites in the region that attract visitors interested in history and archaeology. These sites include ancient ruins, such as the Aksumite Kingdom in Ethiopia, the archaeological sites of the Meroe Kingdom in Sudan, and the Lalibela Rock-Hewn Churches in Ethiopia. These sites provide visitors with an opportunity to learn about the region's rich history and cultural heritage.

The figure below shows the ranking of IGAD Member States on the basis of their natural and cultural resources compared against the World Median. As of 2019, Kenya was ranked first among IGAD Member States at 42nd position globally followed by Ethiopia at 68th position while Uganda ranked 89th position.



FIGURE 2.13: **IGAD Member States cultural and Natural Resources ranking**



Source: World Economic Forum

Tourism authorities in the IGAD region are working to promote these natural and cultural tourism resources to attract more visitors and boost economic growth. This includes developing infrastructure to support tourism, such as airports, roads, and hotels, as well as promoting sustainable tourism practices to protect the environment and local communities. IGAD natural and Cultural resources provide opportunities for visitors to experience the region's natural beauty, cultural heritage, and traditional practices. As efforts continue to promote responsible tourism practices, the region is poised to become a significant player in the global tourism industry

2.4.2 Non-Leisure Resources

Non-leisure Resources Index focus on measuring the extent and attractiveness of factors that drive business and non-leisure travel. One of the key factors in driving business travel is the presence of major multinational corporations. These companies often have a significant travel budget and require their employees to travel frequently for business purposes. Additionally, cities that are highly integrated into the global economy are also important indicators of potential business travel. These cities often have strong transportation links and a developed infrastructure that can support business needs. Another important factor in driving non-leisure travel is academic travel. The number and quality of universities in a country can play a significant role in attracting academic travel.

Countries with strong academic institutions and research facilities are often able to attract academic conferences, seminars, and other events. This can also have a positive impact on the local economy, as attendees often stay in hotels and eat at local restaurants during their visit. Finally, online searches related to business, academic and medical travel could provide a useful insight into the global interest in a country's non-leisure resources.

2.5 TRAVEL AND TOURISM SUSTAINABILITY

Travel and tourism sustainability is a critical aspect of tourism development in the IGAD region. The region is vulnerable to climate change thus underscoring the need for countries to adopt sustainable tourism practices that mitigate the impact of tourism on the environment (WEF, 2022). This includes promoting eco-tourism, conservation of wildlife and natural resources, and minimizing carbon emissions from tourism activities. The following sections analyse the state of travel and tourism sustainability.

2.5.1 Environmental Sustainability

The sustainability of an economy's natural environment, protection of its natural resources, and readiness for climate change is vital. Environmental sustainability policies and factors play a vital role in ensuring a country's future attractiveness as a destination, as an attractive location for tourism relies heavily on the natural environment. The status of a country's environment can be determined by analysing factors such as water stress, marine and air pollution, loss of forest cover, and the degree of extinction risk for species.

> *"To improve the governance of natural resources, there must be deliberate efforts to safeguard biodiversity and ensure that resource extraction is done sustainably and equitably, inclusive of communities, indigenous people, and human rights, especially in ecologically sensitive areas where threats to biodiversity and habitat destruction are very high."*
>
> **— Africa Development Bank Group, 2023**



2.5.2 Socio-economic Resilience and Conditions

Social economic resilience and conditions are important factors that can have a significant impact on the tourism industry in the IGAD region. Poverty, unemployment, and inadequate infrastructure are some of the challenges that need to be addressed in order to ensure the long-term viability of the industry.

To enhance employment outcomes, improve employee productivity and create a larger and higher-quality labour pool, it is essential to address gender equality, inclusion of a diverse workforce, greater workers' rights, and the reduction of the number of young adults not in education, employment or training. The region has consistently demonstrated gender disparities in employment, with a higher number of males in the working age population despite having more females overall. According to the International Labour Organisation (ILO) report, unemployment rate within the IGAD region was 26.3 per cent in 2017, disaggregated as 36.4 per cent for women and 22.1 per cent for men. The disparity in employment is even more manifest across the age categories, with the highest unemployment recorded for the youth (73 per cent). At a country level, Openness of bilateral Air Service Agreements in Uganda for instance, unemployment is a major issue, with an estimated 9.2 per cent of the population being unemployed. To address this issue, the Ugandan government has implemented a number of initiatives to promote tourism as a means of creating job opportunities and generating income for local communities. For example, the Uganda Tourism Board has launched the Tourism for All programme, which aims to promote inclusive tourism and create job opportunities for people with disabilities. These initiatives have helped to create job opportunities and promote social and economic resilience in the tourism industry.

Levels of poverty remains a key concern in the IGAD region. In Ethiopia for example, poverty is a major issue, with an estimated 24 per cent of the population living below the poverty line as highlighted by World Bank report of 2021. To address this issue however, the Ethiopian government has implemented a number of initiatives to promote economic growth and create job opportunities, such as the growth and transformation Plan, which aims to promote sustainable development and reduce poverty. These initiatives have had a positive impact on the tourism industry, as they have helped to create job opportunities and improve the quality of services provided to tourists.



2.5.3 Travel and Tourism Demand Pressure and Impact

The travel and tourism industry is inherently interconnected with its environment and community.. Unplanned tourism development can cause destinations to exceed their capacity, resulting in overcrowding, harm to natural and cultural resources, pressure on infrastructure, increased housing costs, and reduced quality of life for local residents. If these issues are not addressed, they may lead to a backlash against tourism by residents, reduced visitor satisfaction, and decreased overall attractiveness of the destination, all of which have a negative impact on the development of the travel and tourism industry.

The IGAD region has seen a significant increase in travel and tourism demand in recent years. This growth can be attributed to a variety of factors, including increased mobility, improved infrastructure, and a growing middle class in many countries in the region. Uncontrolled growth in the tourism industry can result in destinations becoming overcrowded, causing damage to natural and cultural resources, straining infrastructure, and driving up housing prices. These issues can lead to a decreased quality of life for local residents. If not dealt with, these problems may provoke a negative response from the community toward tourism, resulting in decreased visitor satisfaction and reduced overall attractiveness of the destination, ultimately affecting the development of the travel and tourism sector[11].

Furthermore, the influx of tourists has put significant strain on infrastructure, including transportation systems, water and sanitation facilities, and energy infrastructure. While tourism can bring economic benefits to the region, it is crucial to ensure that these benefits are distributed fairly and do not have a negative impact on local communities. This includes ensuring that local people have access to jobs and business opportunities created by tourism and that their cultural and social values are respected.

11 World Economic Forum Report 2021-2022



2.6 SUMMARY OF SWOT ANALYSIS

STRENGTHS

- Diverse environmental resources
- IGAD region boasts a rich variety and density of wildlife, along with historically significant cities.
- Rich and varied culinary tradition, ideal for the development of gastronomy tourism.
- Rich culture and heritage with historic sites, vibrant festivals, events, celebrations, and an array of arts and crafts
- Relatively well-established air connectivity and strong trade relations with key source markets in Europe, North America, and the Middle East.
- Already existing successful tourism destinations within the region, such Uganda, Ethiopia and Kenya, which can serve as benchmarks for the region.
- Recognized need for regional integration, supported by established institutional frameworks and programmes under the IGAD.
- Fast growing domestic and regional markets

OPPORTUNITIES

- Acknowledgement of trans-boundary tourism activities as an effective vehicle for regional integration
- A growing and youthful population providing an enduring pool of human resource
- A fast-growing middle-income class with high propensity for travel
- Untapped natural and cultural resources within the region with potential for development of niche tourism products such as cruise tourism, culture-based tourism, sports, business, conference and health tourism products
- Increased internal and external investor' interest in a number of tourism sectors including the hospitality sector
- Existence of an elaborative plan of action to develop continent-wide infrastructure through the PIDA including the African Integrated High Speed Train Network, the African Open Skies, ICT penetration, and Regional electricity generation
- Existence of a continental integration and development framework i.e. the AU Agenda 2063 with key aspirations of interest to tourism including: regional integration, good governance, peace and security, removal of barriers for intra-regional movement, enhanced intra-regional trade through a continental Free Trade Area, among others.
- The disintermediation effect of ICTs providing cost-effective access to markets.
- Regional joint efforts to address key challenges to safety and security
- Emerging new markets including intra-IGAD, African market, and Asia- China markets



WEAKNESSES

- Challenges in safeguarding cultural heritage, including issues such as poaching, inadequate protection, human encroachment as well as deforestation and habitat loss.
- Economic loss through leakages especially in international tourism due to limited linkages between different sectors.
- Limited and underdeveloped tourism offerings.
- Shortage of skilled personnel for the tourism industry in a number of Member States
- Inadequate investment in high-quality hotel infrastructure and related facilities.
- Poor quality and unsafe ground transportation infrastructure
- Dependence on external markets, with insufficient attention to regional and domestic markets.
- Strong influence of external travel intermediaries on foreign markets and pricing.
- Cross-border restrictions on labour and people mobility.
- Challenging air transport environment including high flight costs, limited and low-quality airport infrastructure, insufficient qualified human resources, limited connectivity, and lack of transit facilities, safety concerns, low penetration of low-cost carriers, and a restrictive and uncompetitive regulatory environment.
- Limited coordination in policies between the tourism sector and supporting sectors such as industry, trade, aviation, and immigration.
- Absence of an effective well-coordinated regional institutional framework to drive tourism sector development.
- Uncompetitive business environment characterized by high costs, unclear regulatory and fiscal environment, and corruption.
- Limited capabilities for tourism disaster and crisis preparedness and management.

THREATS

- Health related issues including cases of disease outbreaks and epidemics,
- Negative impacts of ICTs on Africa's tourism including the associated costs and effect on changing tourism consumer behaviour and preferences
- Insecurity concerns arising from cases of terrorism, civil war, political tensions, and ethnic tensions and conflicts among others,
- Security-related travel advisories from among the main tourism generating countries
- Impacts of turbulent global economic environment including financial crises and fluctuating energy prices
- Negative global environmental conditions particularly, the effects of climate change and unfavourable mitigation policies.
- Strong competition from emerging and established destinations and regions.



2.7 SUMMARY OF STRATEGIC ISSUES FOR THE IGAD STMP 2024-2034

Given the foregoing analysis, a number of priority intervention areas are necessary to guarantee competitiveness and which would serve as key frameworks for sustainable and long-term tourism growth in the IGAD region.

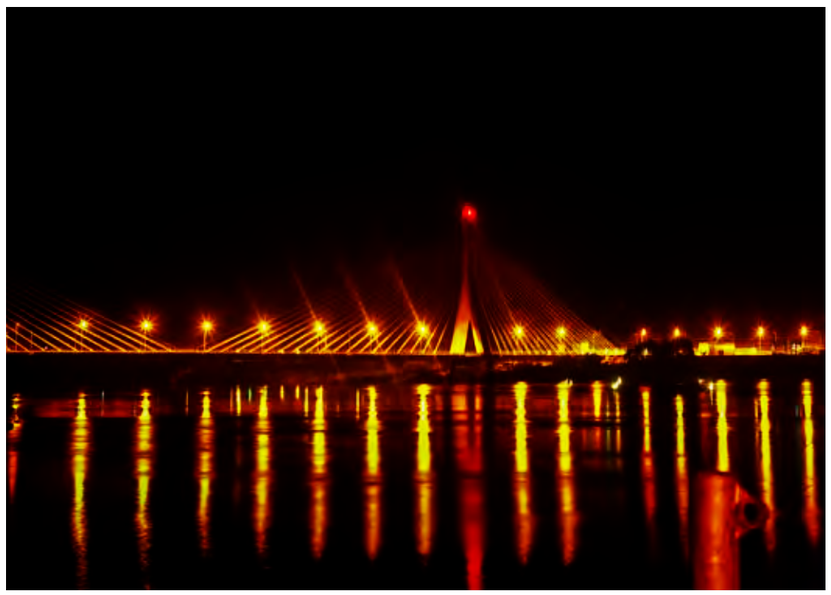
First, a conducive policy, regulatory and institutional framework is essential for sustainable tourism development in the IGAD region. This is key in ensuring formulation of a regional tourism development framework; easing the barriers to visitor movement within the region; and enhancing destination access by promoting Air Service Agreements and Open Sky policies.

Second, tourism product development is an integral part of the industry's competitiveness and should be sustainable and product-led, as opposed to being market-led as is usually the case in the region. In this regard, a regional STMP should provide a framework for tourism product development. Though the onus of national tourism product development rests upon Member States, key actions for this priority area include:

- Developing tourism related products focusing on quality and sustainability, regional and local community integration and industry involvement to gain maximum economic benefit.
- Enhancing the capacity to strengthen and integrate tourism product development throughout the region.
- Packaging the tourism products to reflect both national and regional identities.
- Creating new products/areas to entice and target new visitors to the destination.
- Improving the performance of existing products and enhancing visitors' experience.

Third and deeply interlinked with tourism product development, is destination marketing, a vital part of destination development. It is envisaged that destination marketing within the IGAD region should be geared towards facilitating the achievement of national tourism policies and plans, which should be coordinated within the regional tourism master plan. In addition, whereas Member States will be encouraged to develop their own strategic marketing plans, these should nonetheless be within the context of the regional goal of building up on the uniqueness of each State to complement the wider IGAD destination with a view to enhancing comparative advantage.

Fourth, appropriate skills and knowledge are essential towards creating human capital, which in turn is critical in ensuring the competitiveness of the tourism industry. In order to ensure a sustained human resource pool in the tourism sector, the following actions are necessary: is standardizing tourism training, promoting continuous capacity development of all persons working within the tourism sector



to promote efficiency and equip them with up-to-date skills and knowledge, formulating appropriate policies and legislation that encourage labour mobility across the region, and establishing centres of excellence in tourism training across the region.

Fifth, provision of a safe and secure environment is a critical success factor for tourism development. As already observed, this is a major challenge facing the IGAD region as a whole due to the prevailing perception of insecurity and political instability given the historical and current evidence of both inter and intra-state conflicts. Important to note, issues relating to safety and security manifest themselves beyond national borders, there is therefore urgent need for concerted regional efforts towards the provision of a safe and secure environment for tourism development.

Sixth, destination competitiveness greatly relies on the availability and quality of the prevailing tourism infrastructure. Whereas, previously national governments played a key role in the provision of such infrastructure owing to the underdeveloped private sectors, increasingly private-public partnerships are preferred. This is indeed a major challenge facing the majority of IGAD Member States. Consequently, the main actions identified for this priority area include creating a conducive environment to encourage investments in tourism infrastructure; creating awareness on the potential opportunities for tourism infrastructure investment; and mobilisation of resources to support tourism infrastructure development.





Seventh, physical infrastructure is essential for tourism development. Provision of such infrastructure, for instance, roads, rail, seaports and airports, electricity, ICT, water and waste disposal systems, can in turn play an important role in encouraging investment in tourism infrastructure. Though the responsibility of developing such infrastructure rests upon the governments of IGAD Member States, this should be done in line with the on-going national and intra-regional. Nonetheless, such initiatives should not be used as the only basis for tourism development, but rather, tourism development initiatives should also serve as an incentive to expand the national and regional infrastructure networks amongst IGAD Member States. infrastructure development initiatives. Key actions identified in this context include: promoting the creation of an enabling transport environment for easy access to tourism products; promoting the development of a regional spatial plan to optimise the development and utilisation of infrastructure facilities and services; facilitating the creation of an enabling transport environment for easy access to tourism products; and strengthening of ICT infrastructure relevant to tourism destination areas.

Lastly, tourism development significantly relies upon and can provide motivation for the conservation of both natural and cultural heritage by enhancing the intrinsic ecological values of biodiversity and socio-cultural and economic development through the sustainable exploitation of such resources in the IGAD region. Given the symbiotic relationship between the industry and these resources, it is important that any negative impacts that could accrue from tourism development be minimised. Whilst the onus of conserving such resources rests upon IGAD Member States, it will be necessary for IGAD, in conjunction with relevant authorities, to oversee the conservation of cross-border resources. Accordingly, therefore, key actions identified for this priority area include promoting land-use planning in tourism priority areas to enhance biodiversity conservation; promoting the development of tourism practices that support conservation principles; and development of guidelines for cultural-based tourism development and cultural heritage conservation.

The above strategic issues cut across what is in the sole mandate of a Member State and what can be shared between the IGAD Member States. In this regard, the STMP 2024-2034 proposes

1. Preparation of a guiding framework for tourism development and
2. Formulation of a regional framework for cooperation in tourism development.

03

The IGAD Sustainable Tourism Master Plan 2024-2034



3.1 RATIONALE FOR THE IGAD STMP 2024-2034

This Sustainable Tourism Master Plan is being developed following the recommendations of the consultative meeting on the IGAD STMP (2013-2023) that was held in Mombasa, Kenya between 24th and 27th October 2023 followed by a virtual meeting of the IGAD Member States STMP focal point officers held on the 18th of March 2024. During these two meetings, tourism stakeholders drawn from IGAD Member States underscored the need for cooperation in enhancing tourism development among the Member States. In this regard, the meetings resolved that a common regional tourism development framework be formulated to guide Member States in planning and developing their individual tourism industries and secondly, that areas where Member States could cooperate in developing their tourism sector be identified and a strategic framework development to guide such cooperation. In doing so, stakeholders noted that this regional Tourism Master Plan be informed by the successes and lessons learnt from the STMP 2013-2023.

The Sustainable Tourism Master Plan (STMP) 2024-2034 is formulated to further the aspirations of the IGAD Mission and objectives, the Protocols on the Free Movement of Persons by both the AU and IGAD, AU/NEPAD Tourism Action Plan, AU Minimum Integration Plan, the AU Agenda 2063 flagship project of 'making Africa the preferred destination for tourism', the African Tourism Strategic Framework 2019-2028 (ATSF 2019-2028), the African Continental Free Trade Area (AfCFTA), and the UN Sustainable Development Goals (SDGs) targets in Goals 8, 12 and 17.

3.2 PROCESS OF PREPARING THE STMP 2024-2034

Formulation the Sustainable Tourism Master Plan (2024-2034) for the IGAD region adopted a comprehensive and inclusive process. The process commenced with a stakeholders' evaluative consultative meeting on the IGAD Sustainable Tourism Master Plan (2013-2023) held in Mombasa, Kenya, from October 24th to 27th, 2024. This meeting evaluated the outcomes of implementation of the outgoing STMP and set the foundation for subsequent activities. A second meeting was held jointly between IGAD Secretariat, focal point officers from IGAD Member States and UNECA on March 18th, 2024. The meeting set forth the agenda and approach for formulating the STMP 2024-2034. This was followed by the appointment of a consultant, to lead the process. An analysis report was prepared capturing the state of affairs on tourism development within IGAD region and the global scene. Further included were views from national level stakeholders that were obtained throughout the month of May 2024 ensuring diverse perspectives were incorporated.

Out of this analysis, key strategic issues and priorities were identified. Possible Strategic Actions and implementation framework were also included in the Analysis Report. The Report was then presented for discussion and adoption during a second consultative meeting that took place in Diani, Kenya, between 17th to 21st June 2024. The meeting refined the strategies and frameworks and recommended preparation of the draft STMP 2024-2034.

Finally, the draft IGAD Sustainable Tourism Master Plan (2024-2034) was validated in Addis Ababa, Ethiopia, from July 23rd to 25th, 2024. Here, stakeholders from across the region converged to endorse and finalize the comprehensive blueprint aimed at fostering sustainable tourism development within the IGAD Member States. This process ensured that the IGAD Sustainable Tourism Master Plan 2024-2034 was robust, inclusive, and ready for implementation, marking a significant milestone in regional collaboration and sustainable tourism development across the IGAD region.

3.3 UNDERPINNING REGIONAL AND GLOBAL DEVELOPMENT FRAMEWORKS

A number of regional and continental socio-economic development initiatives underpins the formulation of IGAD STMP 2024-2034. Key among such initiatives are discussed below.

The Mission of the IGAD

The mission of IGAD is to assist and complement the efforts of the Member States to achieve, through increased cooperation: food security and environmental protection, peace and security, and economic cooperation and integration in the region. The particular objectives of IGAD that are applicable to this STMP include the following:

1. Promoting joint development strategies and gradually harmonize macroeconomic policies and programmes in the social, technological and scientific fields.
2. Harmonizing policies with regard to trade, customs, transport, communications, agriculture, and natural resources, and promote free movement of goods, services and people within the region.
3. Creating and enabling environment for foreign, cross-border and domestic trade and investments.
4. Initiating and promoting programmes and projects for sustainable development of natural resources and environment protection.
5. Developing and improving a coordinated and complementary infrastructure, in the areas of transport, telecommunications, and energy in the region.
6. Mobilizing resources for the implementation of emergency, short-term, medium-term and long-term programmes within the framework of regional cooperation.



The IGAD Free Movement of Persons Protocol

The IGAD Member State Ministers in charge of Internal Affairs and Labour approved the IGAD Protocol on Free Movement of Persons in 2020. The Protocol is enshrined in the 1996 Agreement Establishing the Intergovernmental Authority on Development (IGAD), Art. 7(a) and Art. 13(o), where the Agreement establishing IGAD calls upon IGAD Member States to deepen regional integration through, among other things, creating a regime of free movement of persons, right of residence, and right of establishment. Today, five IGAD countries have signed the Protocol, namely the Republic of Sudan, the Republic of South Sudan, the Federal Republic of Somalia, and the Federal Democratic Republic of Ethiopia, and the Republic of Uganda.

Free movement of people across Africa and IGAD specifically, represents a powerful boost to economic growth and skills development when people can travel with ease for business, tourism or education. What is more, free movement in the IGAD region can address some of the major challenges that many IGAD labour markets face. It can plug skills gaps while enabling countries to fix skills mismatches in their labour markets. With more people able to move freely, firms can much more easily find the necessary talent and skills that they need. This is critical to driving productivity, which in turn, has an impact on the economic growth of countries. The IGAD STMP 2024-2034 will seeks to leverage on these benefits and equally provide an economy rationale for region-wide adoption of the Protocol.

Other relevant IGAD regional initiatives include the Nairobi Declaration on Ending Drought Emergencies in the Horn of Africa (2011), the IGAD Conflict Early Warning and Response Mechanism (2002), Climate Prediction as conducted by the IGAD Climate Prediction and Applications Centre (ICPAC) through the Greater Horn of Africa Climate Outlook Forum Climate Prediction (GHACOF), the Nairobi Protocol on the Prevention, Control and Reduction of Illicit Small Arms and Light Weapons in the Great Lakes Region and the Horn of Africa (2004), and the Protocol on the Prevention, Combating and Eradication of Cattle Rustling in the Eastern Africa Region (2008)

Africa Union Agenda 2063 initiatives

a) 'Making Africa the preferred destination for tourism'

Agenda 2063 Framework was adopted by the African Union Summit in January 2015. Agenda 2063 is a shared strategic framework for inclusive growth and sustainable development. The Agenda specifically identifies tourism as a key economic sector for the region's economic transformation and as a driver for continental integration, and as a source sector for Domestic Resource Mobilization (DRM) towards financing implementation of the Agenda 2063. In view of this recognized potential, the AU Agenda 2063 identifies *'making Africa the preferred destination for tourism'* as one of its flagship projects. The first Ten-Year Implementation Plan (FTYIP 2013-2023) highlights importance of the tourism industry and sets key targets including increasing the industry's GDP contribution by 100 per cent and doubling of the 2013 intra-regional tourism levels.

b) The AU Protocol on the Free Movement of Persons

Another key initiative under the AU Agenda 2063 is the *AU Protocol on the Free Movement of Persons* that envisions establishment of African Passport and removing visa requirements across the continent. First conceived more than 25 years ago in the 1991 Abuja Treaty, the Free Movement of Persons in Africa, a flagship programme of the African Union's Agenda 2063, is an aspiration for the continent or a tool for harnessing regional connectedness, integration, broader trade, labour migration or development goals, consistent with the Global Sustainable Goals of the United Nations 2030. The Protocol on Free Movement was adopted at the AU Summit in January 2018. In line with this aspiration, the IGAD STMP 2024-2034 seeks to facilitate intra-regional movement of visitors and labour.

c) The Single African Air Transport Market (SAATM)

Probably one of the most important initiatives under this Agenda is the *Single African Air Transport Market (SAATM)* that seeks to create a single unified air transport market in Africa to advance the liberalization of civil aviation in Africa. It is foreseen that SAATM will ensure aviation plays a major role in connecting Africa, promoting its social, economic and political integration and boosting intra-Africa trade and tourism as a result. The IGAD STMP 2024-2034 seeks to leverage on this initiative and provide a demand-led justification for Member States to participate in the SAATM.

Other key Agenda 2063 aspirations envisaged to be realised within the FTYIP and that are significant to tourism development include:

- Blue/ ocean economy for accelerated economic growth
- Preservation of peace security and stability
- Development of world class infrastructure including communications and infrastructure connectivity through PIDA
- African cultural renaissance
- Africa taking full responsibility for financing her development



d) African Tourism Strategic Framework 2019-2028 (ATSF 2019-2028)

Arising from the targets of FTYIP 2013-2023, the African Union Commission formulated the Tourism Strategic Framework that seeks to provide strategic action plans geared towards development of a competitive, sustainable and integrated tourism industry in Africa. In this context, the ATSF 2019-2028 seeks to pursue three core Strategic Directions:

i. Develop a globally competitive African Tourism brand
ii. Ensure that African tourism is sustainable, inclusive and a driver for regional integration
iii. Formulate an enabling tourism policy, regulatory and institutional framework

Towards advancing IGAD tourism alignment with this regional framework, the STMP 2024-2034 will advance the development of a globally competitive regional tourism by offering diverse and authentic experiences to IGAD residents and visitors alike.

e) The African Continental Free Trade Area (AfCFTA)

The African Continental Free Trade Area was founded in 2018 by the African Continental Free Trade Agreement among 54 of the 55 African Union nations with trade commencing as of 1 January 2021. One of the key Agenda 2063 aspirations, AfCFTA seeks to accelerate intra-African trade and boost Africa's trading position in the global market. On liberalization of trade in services, the AfCFTA identifies tourism as one the seven priority sectors with the rest being logistics and transport, financial services, professional services, energy services, construction, and communications. It is envisioned that the IGAD region will benefit from the AfCFTA Agreement including contribution to greater market access for tourism businesses and operators; economies of scale in production and quality supply of tourism services; better opportunities for networking and complementarity for the tourism industry; reducing tourism services costs; facilitating investment in vital tourism infrastructure; and enhanced collaboration among tourism businesses and operators and their eventual participation in regional tourism value chains[12].

12 As opined by Desire Loumou, Head of Division Intellectual Property Rights of the AfCFTA Secretariat – Accra – Ghana.



UN Sustainable Development Goals (SDGs)

Adopted during the 70th Session of the UN General Assembly, the 2030 Agenda for Sustainable Development stipulates 17 Sustainable Development Goals (SDGs) that aim to, *inter alia*, - end poverty, protect the planet, and ensure prosperity for all. Within this 2030 Agenda, the significance of the tourism industry as a tool for global sustainable development is clearly highlighted. Whereas tourism can in one way or the other contribute to all the 17 goals as demonstrated by the UNWTO (2015)[13], the sector's direct contribution is identified in the following three SDGs

- **Goals 8:** on inclusive and sustainable economic growth**.** Target 8.9 commits Member States to "devise and implement policies to promote sustainable tourism that creates jobs and promotes local culture and products".
- **Goal 12:** on sustainable consumption and production (SCP). Specifically, SDG Target 12.b highlights the importance of sustainable tourism as a driver for jobs creation and the promotion of local culture and products
- **Goal 14:** on sustainable use of oceans and marine resources, respectively. In particular, SDG Target 14.7 identifies tourism as one of the tools to "increase the economic benefits to Small Island Developing States (SIDS) and the Least Developed Countries (LDC)" , and
- **Goal 17:** Partnership for the Goals.

The IGAD STMP will play a key role in formulation of sustainability policies at regional level, and more so in mobilizing the travel trade and visitors in promoting sustainable consumption and production, and enhancing relevant partnerships.

13 UNWTO (September, 2015). Tourism and the Sustainable Development Goals. Available in https://www.e-unwto.org/doi/book/10.18111/9789284417254



The UNWTO ten priorities of the Agenda for Africa

Adopted during the 61st UNWTO Regional Commission for Africa held in Abuja, Nigeria, (4 - 6 June 2018), the UNWTO ten priorities of the Agenda for Africa identifies ten key areas that it would seek to collaborate with Africa in line with the provisions of the UN Sustainable Development Goals. The Ten priorities identified are:

1. Advocating the Brand Africa,
2. Promoting Travel Facilitation (Connectivity / Visa)
3. Strengthening Tourism Statistics Systems
4. Expanding of Capacity Building incl. Training Facilities,
5. Promoting Innovation and Technology
6. Fostering Resilience (Safety and Security, Crisis Communication)
7. Unlocking Growth through Investment Promotion by Public Private Partnerships
8. Empowering Youth and Women through Tourism
9. Advancing the Sustainability Agenda (especially, Biodiversity)
10. Promoting Cultural Heritage

In view of these UNWTO priorities, the IGAD STMP 2024-2034 focus on promoting innovation and technology adoption in tourism, championing destination resilience, advancing the sustainability agenda and promoting niche products within the IGAD Region.

3.3 BUILDING ON THE STMP 2013-2023

The aspiration to develop a competitive and sustainable tourism industry within the IGAD region through an integrated framework was first mooted through the formulation of the first Sustainable Tourism Master Plan (STMP) 2013-2023. The 2013-2023 STMP was guided by the mission, aims, objectives and principles of IGAD and further informed by the Africa Union (AU) Minimum Integration Programme (MIP) Instrument. The Tourism Action Plan Africa 2004 additionally informed the STMP for the New Partnership for Africa's Development (NEPAD).

In line with these frameworks, the main aim of the IGAD STMP 2013-2023 was to provide Member States with a regional framework for sustainable tourism development with a view to contribute to socio-economic development and poverty alleviation and to promote regional integration. The STMP was guided by the following underlying principles:

1. Tourism development should be sustainable providing both inter- generational and intra-generational equity;
2. The Master Plan should provide a vision for tourism development in the region;



3. The master plan should enhance the competitiveness of the IGAD region as tourist destination;
4. Tourism development strategies should be in line with the wider national, regional, continental and international development initiatives and economic development plans; and that
5. Tourism development should be guided by sound research

A number of priority intervention areas were included in the STMP that were considered necessary to guarantee regional competitiveness and which would serve as key frameworks for sustainable and long-term tourism growth. These areas included:

1. Policy and Regulatory Framework
2. Tourism Infrastructure
3. Tourism Product Development
4. Infrastructure Development
5. Tourism Marketing
6. Tourism, Natural and Cultural
7. Human Resource Development
8. Tourist Safety and Security
9. Heritage Conservation
10. Research and Development

Key achievements

The STMP ended in 2023 and an evaluation undertaken across the Member States to ascertain the outcomes of its implementation.

Overall, it was observed that whereas the STMP was largely unknown within the tourism sector in most of the Member States, it had realised a number of successes in its implementation

- The STMP served as a reference document for the formulation of the Ethiopia and Uganda National Tourism Master Plan.
- It resulted in a number of regional integration initiatives different areas of the tourism sector
- Enhanced tourism awareness at the level of communities
- The STMP helped in making travellers more aware of new tourism products and experiences.
- Issues of sustainability have been brought to the fore as many tourism players have adopted and implemented practices to ensure tourism benefits the local community and environment in the long term.
- Member States and private sector have continued to realise the need for supporting regional tourism initiatives. The private sector is increasingly taking up and providing regional tourism packages.
- Businesses are more aware of the importance of Sustainable Tourism Practices in their areas of operations and are sensitive to employing best practices.

The above notwithstanding, a number of bottlenecks were noted that hinder full realization of the IGAD STMP 2013-2023 aspirations. These include

- Lack of commitment from the members of the region. For instance, in poor initiatives to mobilize resources like finance, human capital, (skilled manpower in the sector)
- Incidences of border conflicts and misunderstanding between the neighbouring countries
- Cases of Political instability and/or uncertainty
- Lack of a coordinated approach in tourism development by various stakeholders in tourism. Various countries not fulfilling their part in agreed agreements made that affect tourism directly or indirectly.
- Regional tourism initiatives were not fully implemented due to the continued effect of COVID-19
- Lack of financial support for implementation of the regional Master Plan
- Limited cooperation of the IGAD Member States in the development of Tourism
- Lack of effective implementation mechanism
- Inadequate infrastructure including roads and airports connecting IGAD Member States.
- Most Member States did not fully mainstream the Master Plan in national planning since they were not given guidelines on how that can be done. Hence need to provide guidelines, ensure each member state has a contact person
- There has been limited collaboration in human resource development - training and research institutions have no collaboration platform - hence need to establish a collaboration platform and support a mechanism that facilitates staff and student exchanges, organizing of regional tourism conferences etc.

Lessons learnt from the implementation of STMP 2013-2023

Out of these successes and bottlenecks, a number of lessons can be drawn that would inform the success of a the next STMP for the IGAD region

1. Goodwill from the Governments of Member States is a critical factor in the implementation of the STMP
2. The citizens of the Member States need to identify with IGAD and with each other. Facilitating people movement and activities that would bring the region together is therefore important.
3. Promotion of uptake including awareness campaigns, cascading regional



plans into national level plans, and a clear and sustained communication strategy including information exchange to build trust
4. A country-specific approach to implementation should be the preferred option. This can be benchmarked on the Northern Corridor Infrastructure project that has both internal and external support; and One-Stop Border Project in the EAC,
5. Implementing a regional STMP requires a clear monitoring and evaluation framework
6. A sustainable financing model for implementation of the STMP especially the joint programmes. IGAD should take lead in establishing and supporting such a funding model.
7. Regional approach to disaster/crisis management?

There is therefore need to isolate the programmes that can be implemented jointly and provide a priority map for them. In addition, there should be a Regional Tourism Development Guide that would serve to guide Member States on tourism planning and ensure a harmonised approach in tourism planning within the IGAD region.

3.4 VISION OF THE IGAD STMP 2024-2034

To position the IGAD region as a cohesive, globally competitive, and sustainable tourism destination

3.5 AIM AND OBJECTIVES OF THE IGAD STMP 2024-2034

The main aim of the STMP is to provide IGAD Member States with a regional framework for sustainable tourism development with a view to contributing to socio-economic development, poverty alleviation and to promoting regional integration.

Specifically, the STMP seeks to:

1. Identify strategic areas of cooperation in tourism development among the IGAD Member States
2. Identify appropriate strategies and actions that can enhance the competitiveness of individual IGAD Member States and subsequently the IGAD region as a global tourism destination.
3. Provide a detailed roadmap for the implementation of the STMP strategic actions
4. Develop an efficient coordination mechanism for tourism development within the IGAD region.
5. Formulate a resource mobilization plan to ensure sustainable financing of the STMP priority programmes.

3.6 GUIDING PRINCIPLES OF THE STMP 2024-2034

Generally, the STMP adopts a stakeholder-led tourism planning and development approach that allows linking of the framework for decision-making to other economic sectors, and one that takes on board the views of relevant stakeholders including government, private sector, academia, civil society and local communities. While the STMP is designed to be goal-oriented in nature as opposed to being reactionary, it is also designed to accommodate changes in both the internal and external tourism environment.

The formulation of the IGAD STMP 2024-2034 will be guided by the following principles:

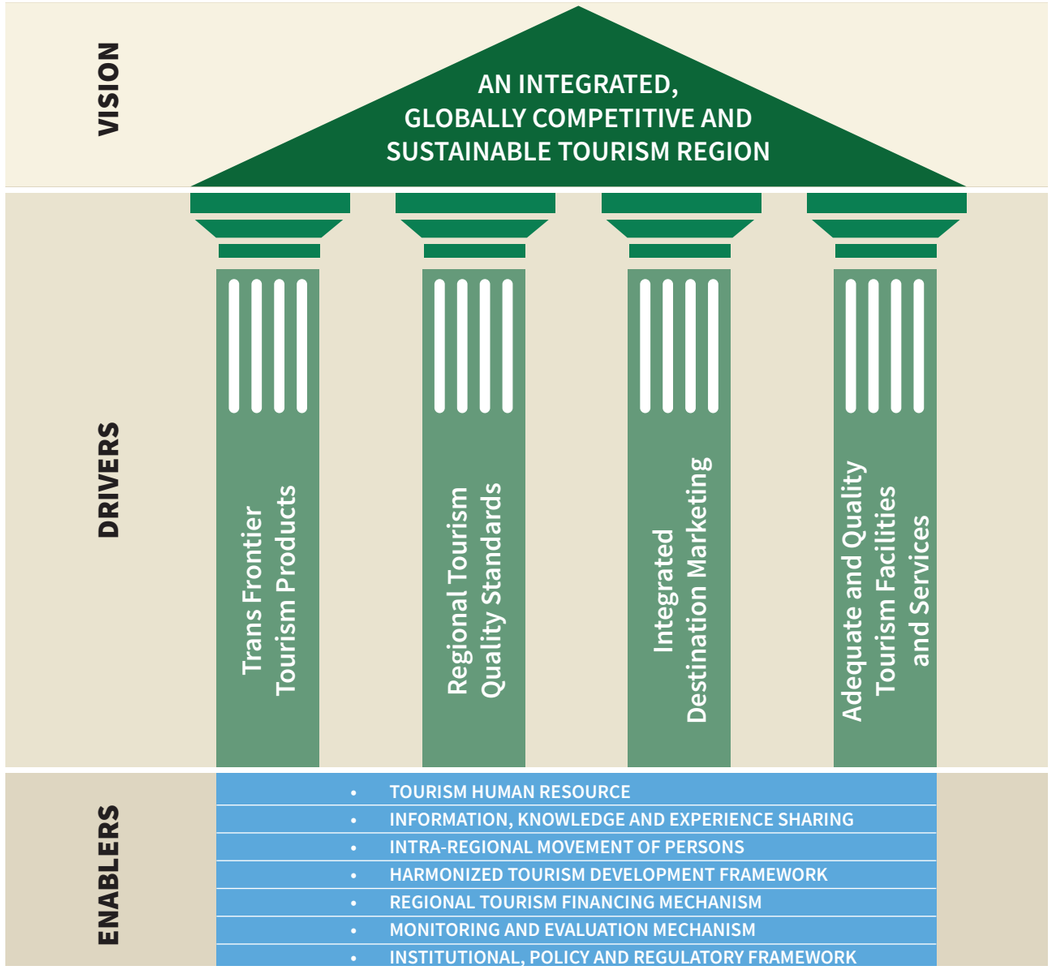
1. The STMP should facilitate deeper regional integration within the IGAD region, aligning with IGAD's mission and broader goals to enhance collaboration and mutual benefits among Member States
2. The Master Plan should articulate a clear and compelling vision for tourism development in the IGAD region, and outline strategic interventions to achieve this shared vision
3. The STMP should strengthen the competitiveness of the IGAD region as a premier tourist region through targeted strategies that enhance attractiveness and market positioning
4. Tourism development strategies should be harmonized with the wider national, regional, continental, and international tourism and related sectoral initiatives to ensure coherence and maximize impact
5. The Master Plan should promote the principles of interdependence and mutual interest among IGAD Member States
6. The STMP should enhance local capacity for tourism development by implementing policies that support skills training, access to funding and markets, and integration into the tourism value chain.
7. The STMP should provide avenues to deepen partnerships in tourism development between the public and private sectors, development partners, and civil society
8. The development of tourism in the IGAD region should pursue an integrated approach with specific focus on developing and optimizing its value chain and creating policy-convergence and synergies with relevant economic sectors.



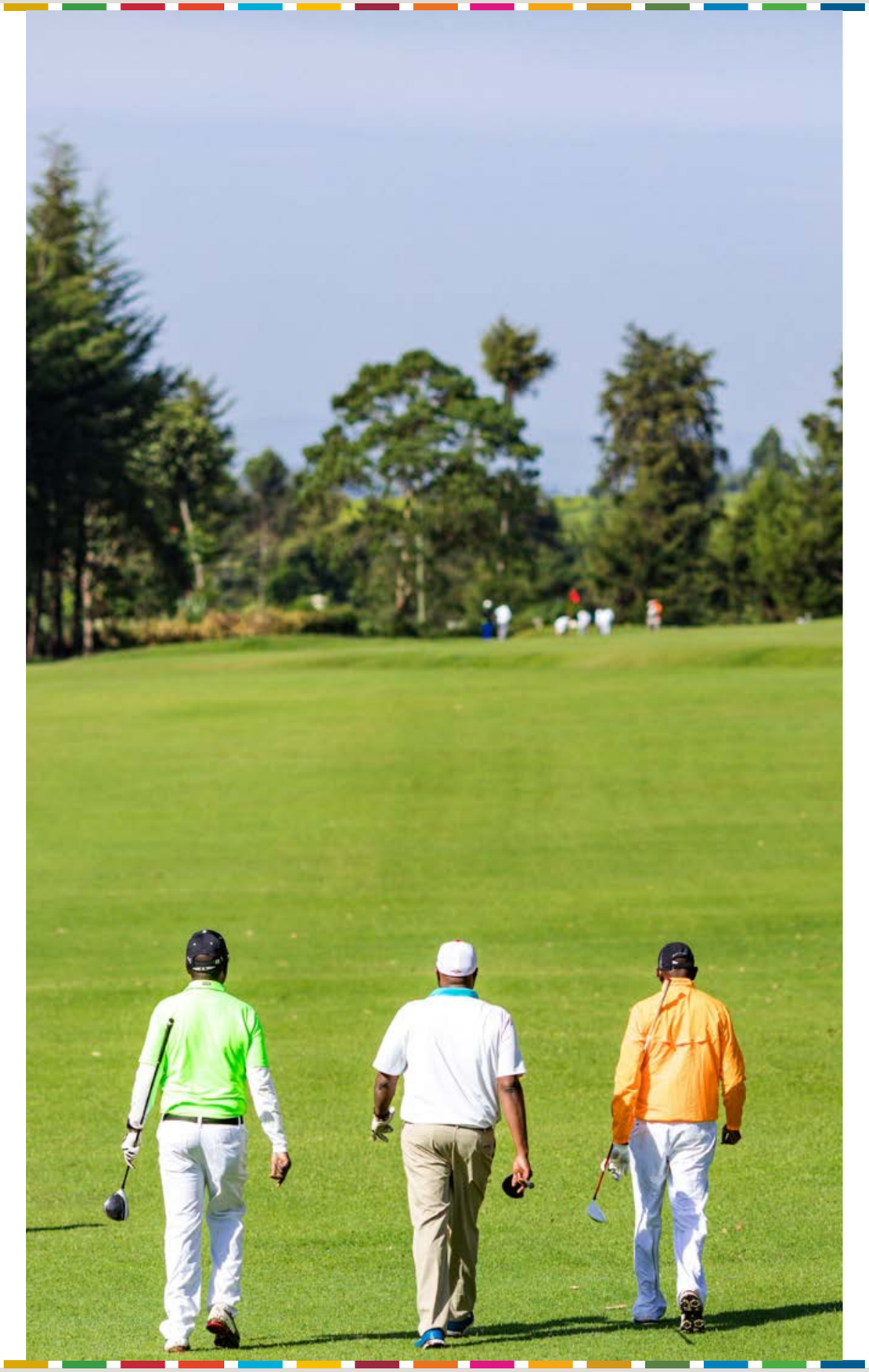
3.7 IGAD STMP 2024-2034 STRATEGIC DIRECTION

To realize the Vision of the IGAD STMP 2024-2034, it will be necessary to focus on key priority intervention areas essential to guarantee competitiveness and serve as key frameworks for sustainable and long-term tourism growth. In this context, the STMP will focus on Four Drivers of competitiveness and SEVEN enablers as provided in the Strategic Map below:

FIGURE 3.1: **IGAD STMP 2024-2034 Strategic Framework**



Each of these Pillars is presented below as STMP Priority Area



PRIORITY AREA 1:
DEVELOPMENT OF TRANS-BOUNDARY TOURIST PRODUCTS

Introduction

Numerous opportunities exist for transborder tourist products in the IGAD region including cultural tourism products, wildlife, and marine-based products among others. These products would appeal to respective domestic markets, regional markets and international market alike. Destination development plans will consider the potential for alignment and synergy with regional products and markets. This would call for preparation of development plans with respective partner countries. A good example is SADC region's collaborative programme called *Boundless Southern Africa* which focused on the development and marketing of trans-boundary conservation areas. Such plans were also envisioned in the IGAD region's *Sustainable Tourism Master Plan (2013-2023)* and COMESA's product diversification effort that among others, seeks to develop transboundary tourism packages. Examples abound where such an approach has been used for instance the EU "Napoleon route" and "Wine route", Euro-Asian "Silk Route" among others.

Strategic Objective:

Develop integrated tourism products across the different IGAD Member Countries

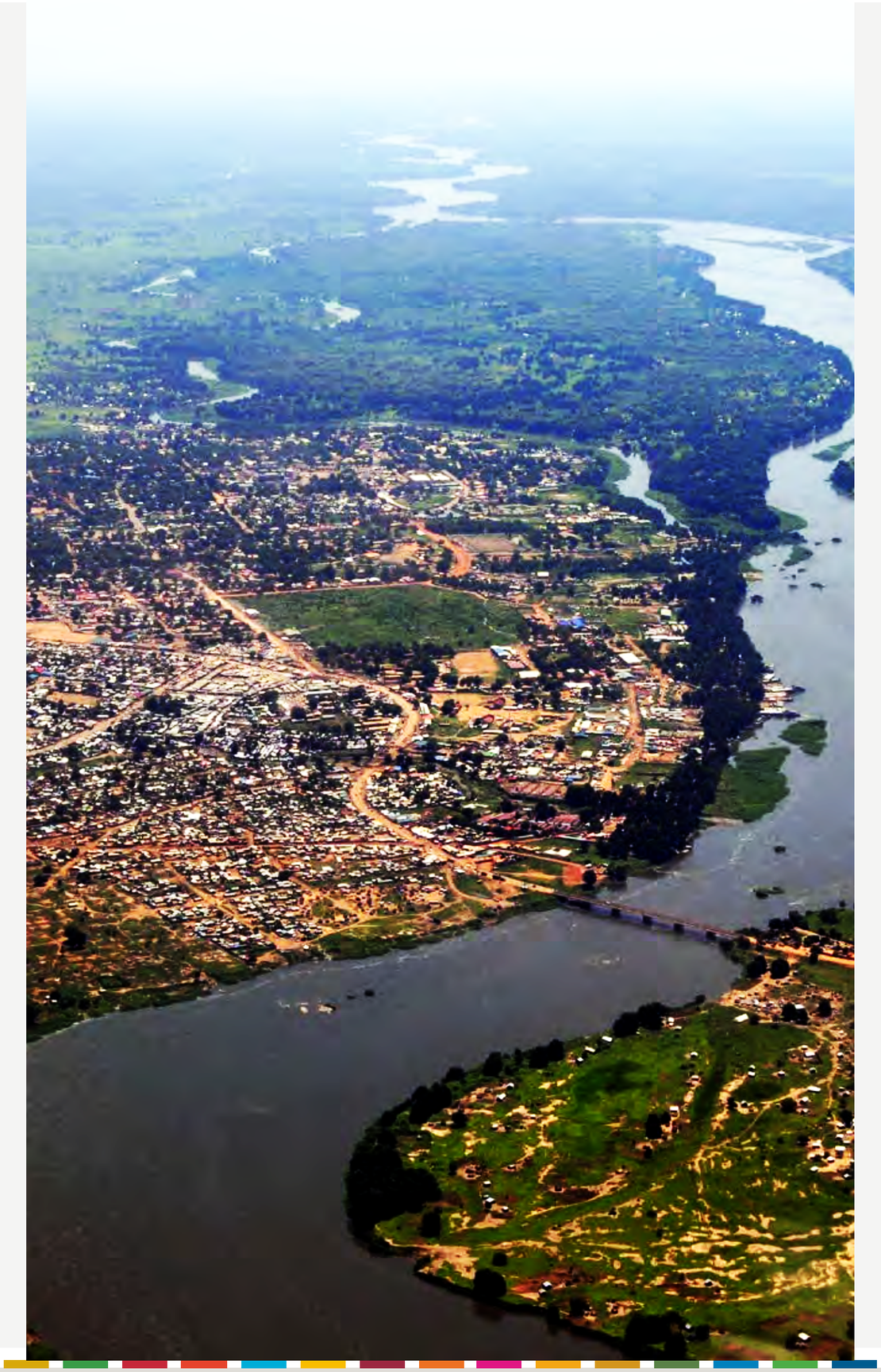
Strategic Actions

Specific actions in this programme will thus focus on the following areas

1. **Map potential transboundary flagship tourism products**
   An inventory of all possible flagship transboundary tourism products will be established. Such inventory will provide different categories of tourism products.

2. **Formulate product development plans for trans-boundary flagship products**
   Upon establishment of the potential flagship trans frontier tourism products, product development plans will be formulated clearly identifying the scope of activities, attractions, facilities, routes, infrastructure requirements, zoning requirements, among others. The plans will also project the financial resource requirement and develop an investment promotion proposal.

3. **Implement transborder tourist product development plans**
   Implementation of the transfrontier product development plans will focus on public sector infrastructure development and seed investments, and implementing initiatives to attract private investments.



PRIORITY AREA 2:
REGIONAL TOURISM QUALITY STANDARDS

Introduction

An emphasis on service excellence and service standards will be integral towards tourism product development in the region. This will be enhanced through the adoption of international service standards, benchmarks and voluntary certification schemes that address service quality, sustainability as well as service excellence[14]. While promoting tourism growth in the region, it is vital to ensure that such growth is based on customer-focused services that are world-class. Further, the promotion of industry products and service standards that are customer-focused will be critical towards enhancing the competitiveness of the region.

Strategic Objective:

Establish uniform quality standards for the tourism sector across the IGAD region to enhance service consistency, improve visitor experiences, and promote regional competitiveness.

Strategic Actions

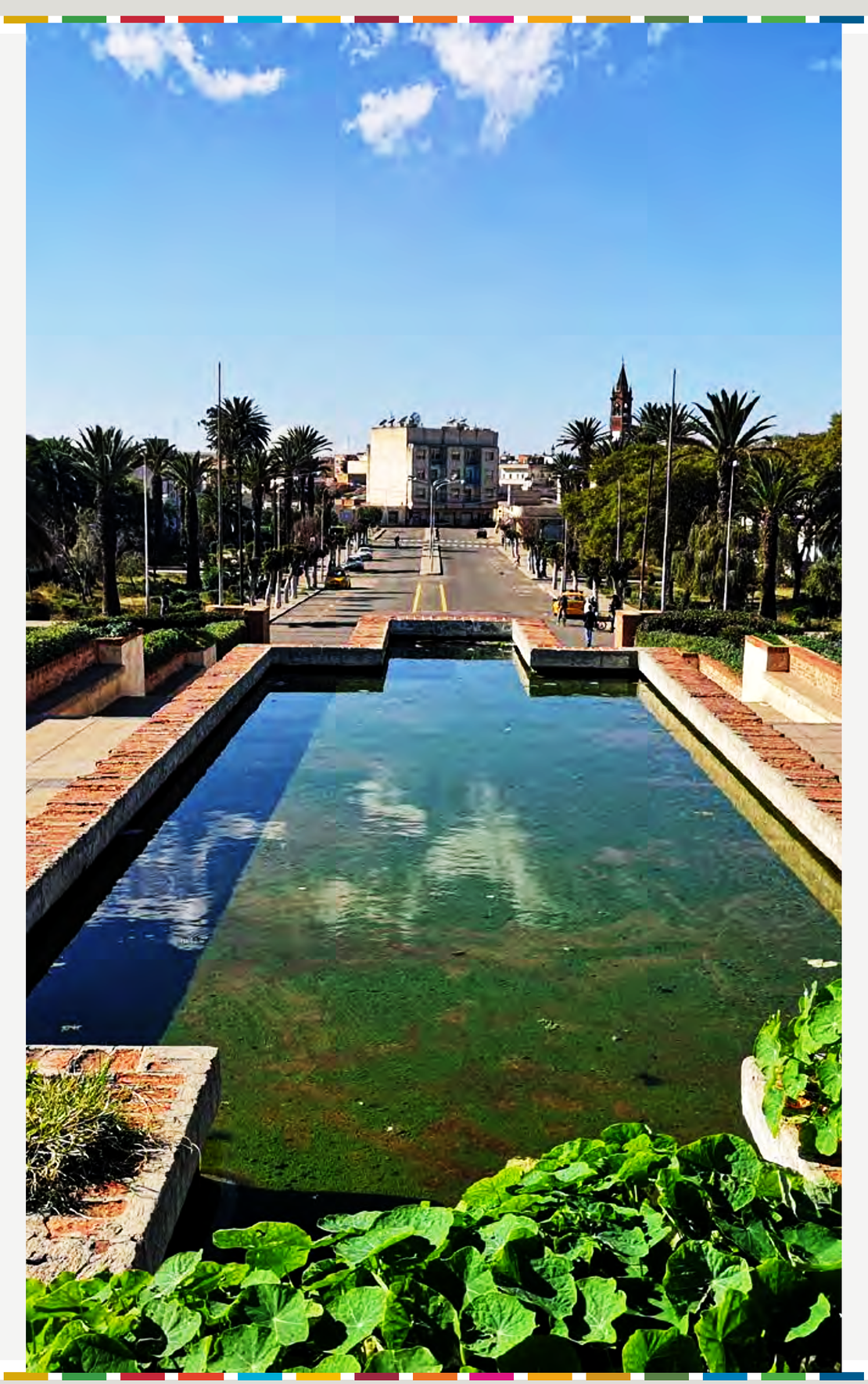
1. **Develop unified quality standards for the tourism industry**
   To guarantee that tourist facilities meet international service standards, the need for classification of such facilities cannot be gainsaid. To achieve this, a classification criterion, benchmarked on the best global standards will be developed. This tool will have different modules for the different types of hospitality facilities including hotels, guest houses, lodges, and restaurants, among others. It is important to note that such a tool will not only be used for classification purposes, but will also serve as a guide to hospitality investors and facility developers.

   This classification tool will be developed through a multi-stakeholder consultation and be implemented through a multi-stakeholder body at each Member States level bringing together representation from both the public and private sector players with representation from the region.[15]

2. **Create a Regional Quality Standards Certification Programme**
   Develop a certification programme that recognizes and rewards tourism businesses and destinations that meet or exceed the quality standards

14 This will be modelled after such leading approaches as the *Swiss Model for Total Quality Management* (The "Quality Seal of Approval for Swiss Tourism") and the European Foundation for Quality Management.

15 Lessons can be drawn from the EAC Hotel Classification system that is currently being implemented within the EAC Member states including four IGAD Member States. IGAD will consider entering into discussion with EAC to assess the possibility of extending the same system into the rest of its Member States



PRIORITY AREA 3:
TOURISM PROMOTION AND MARKETING

Introduction

Tourism marketing will be an integral component of destination growth and development. While product development is associated with the creation of attractions or experiences, marketing plays a key role in communicating the value and appeal of the products to would-be consumers and is an essential tool for enhancing destination competitiveness. The main objective from the demand-side is to increase visitor numbers, while from the supply-side, marketing can be instrumental in attracting investors to invest in a range of destination goods and services including accommodation, entertainment, retail and infrastructure, thereby further boosting tourism growth and development. This Priority Area focuses on strategic interventions to market IGAD region as a tourism destination in international and regional markets.

Strategic Objective:

Market and promote the IGAD Member States as competitive destinations for both regional and international visitors

Strategic Actions

1. **Formulate a regional tourism marketing strategy**
   Strategic positioning of the IGAD region as a globally competitive tourism destination will require formulation of a regional tourism marketing strategy. This will focus on international and regional positioning of each Member State and the regional in general

2. **Pursue a unified promotional effort in the international marketplace**
   A unified promotional effort in the international marketplace will be adopted within the IGAD region. This will involve coordinating efforts from Member States to market the region as a single destination therefore sharing costs and demonstrating areas of complementarity.

3. **Create a destination marketing strategy for the IGAD regional Market**
   To ensure increased intra-regional travel, there is need to formulate tourism marketing strategies at country level targeting this market. This would be essential to guide development of the regional tourism market and promotion of Member States as destinations for the regional market. This will involve among others,

   - Organizing rotational tourism exhibitions in each Member State,
   - Organizing events geared towards showcasing IGAD region to IGAD residents and



   - Promoting initiatives to drive people-to-people interaction and cultural exchanges including sports and cultural events

4. **Develop a Destination Management System and a Tourism Portal**
   ICT-based destination management systems are today a source of competitive advantages for destinations worldwide. A Destination Management Systems (DMS) for the IGAD region will be developed to provide an avenue through which tourism products can be distributed through various channels[16].

   A regional DMS will be thus crucial in providing in-depth information of what each country has to offer and encompass issues relating to product management, enquiry management services, visitor relations management, and facilitate bookings.

   In addition, the creation of a regional user friendly and informative tourism portal will be needed to ensure provision of comprehensive, reliable, and accessible information on the range of sites, experiences, and resources available to travellers.

16 Successful case studies include the EU and the ASEAN region where all the member countries display information on their tourism offering in a joint DMS

PRIORITY AREA 4:
PROMOTING TOURISM INVESTMENT IN THE REGION

Introduction

The need for world-class tourism infrastructure remains an urgent need across the IGAD region. As noted in the situational analysis, the IGAD region as a whole is attracting relatively small number of international hotel chains just as an indicator of the tourism FDI. Attracting and retaining tourism investments in the IGAD Member States will therefore be a priority during this STMP. This will be aimed and creating employment and guaranteeing adequate supply of tourism facilities and services. To achieve this, the following Strategic Actions

Strategic Objective:

Promote the IGAD region as an attractive investment destination for tourism investors with a view to enhancing the capacity of the region to offer competitive facilities and services, create employment, and contribute to overall economic development.

Strategic Actions

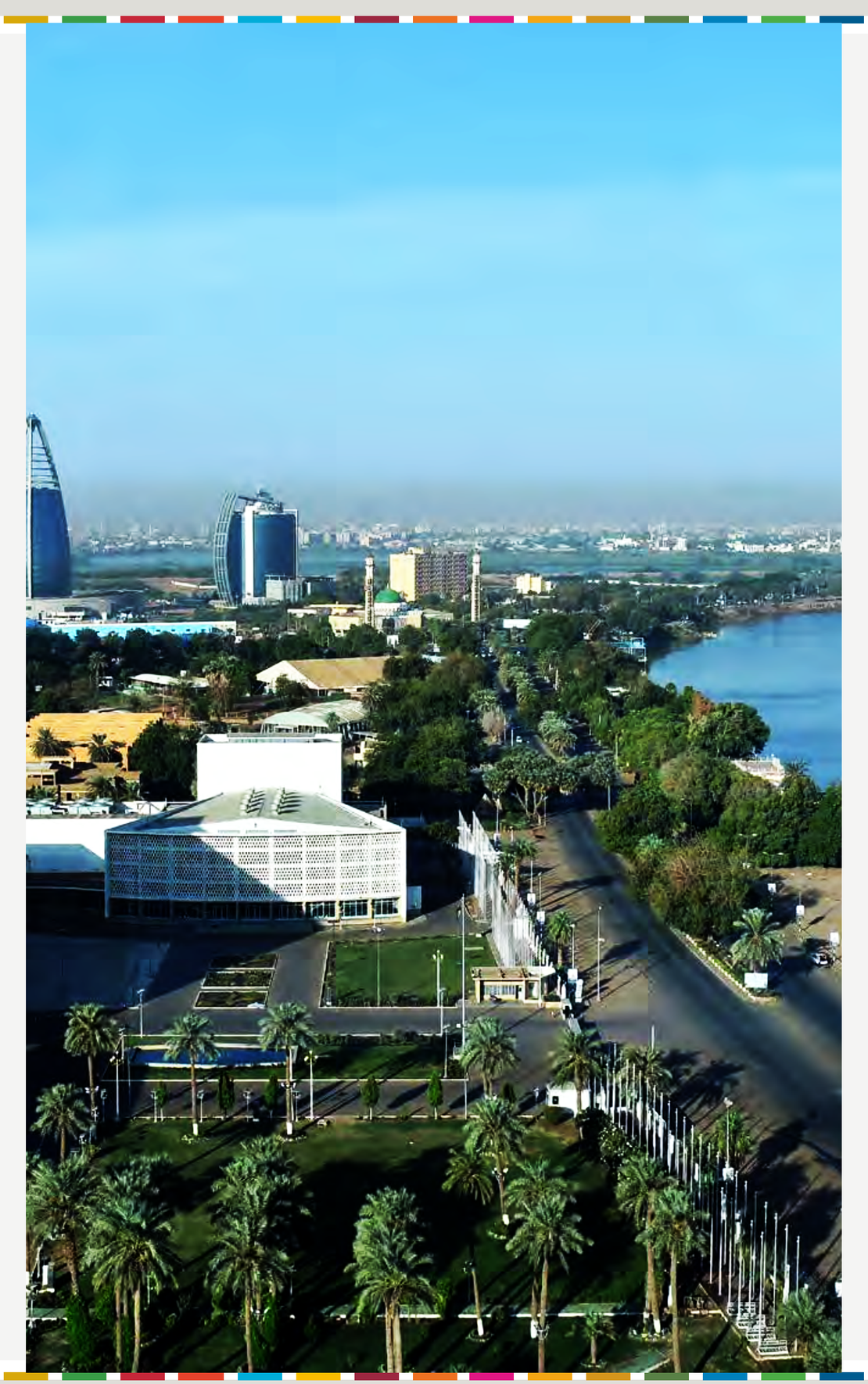
1. **Prepare an Investment Promotion Guide for the IGAD region**
   To guide the Member States in the promotion of tourism investments, a tourist investment guide will be developed for the IGAD region. This will ensure inventorizing the tourism investment opportunities in each Member State in the different tourism subsectors and product categories.

   In addition, the guide will feature
   - An indicative investment capital requirements
   - Public sector support infrastructure development plan
   - Investment incentives

This investment guide will be used an investment promotion tool.

2. **Member States adapt the joint Tourism Investment Promotion Guide**
   The goal of this will be to showcase potential tourism investment opportunities in the region and interest investors to take up the opportunities. Investment promotion events will be organized internationally, regionally and internally to meet potential investors. A keen focus will also be dedicated towards efforts to involve African diaspora in promoting investment in tourism. Ethiopia for instance, has developed initiatives targeting the diaspora, which can also be utilized in investment promotion for the tourism sector.[17]

17 Lessons from initiatives in Nigeria, Kenya, and Afghanistan serve as examples of similar types of mechanisms targeting diaspora investment. The Afghanistan Investment Guarantee Facility (AIGF) is a good example.



PRIORITY AREA 5:
TOURISM HUMAN RESOURCE DEVELOPMENT

Introduction

Human resource development is key to enhancing the competitiveness of any given tourist destination. Given that the tourism industry is largely service oriented, the role of human resources is ever more important. In the IGAD region, there inter-regional variations in the global ranking of literacy levels within the region. The quality and accessibility of training facilities also varies significantly and more efforts is needed to develop sufficient human capital for tourism. Important to note is that when considering the development of human resources for the tourism sector, it is essential that a holistically approach is taken to include those working directly in the industry or private sector, those in the training institutions, and those charged with the responsibility of policy and planning for the sector. Nevertheless, there are opportunities that exist in the region presented by regional integration. This would however require formulation of appropriate policies and legislation that encourage labour mobility across the IGAD region. It would also be appropriate for Member countries to support establishment of centres of excellence and strengthen existing ones in tourism and hospitality training across the region.

This programme area aims at build long-term supply of globally competitive human resource for the sector

Strategic Objective

To guarantee that each IGAD Member State has adequate and qualified and that is sufficiently facilitated human resource at all levels of the tourism sector including business operations and management, destination policy, development and management, and research and academia.

Strategic Actions

Focus of Strategic actions under this priority area will be on

1. Bridging the short-term HR needs for the tourism sector within the IGAD Member States
2. Development of a sustainable supply of globally competitive human resource for the tourism sector.

1. **Bridging the short-term HR needs for the tourism sector within the IGAD Member States**

   This will be achieved through the following measures

   a. **Formulate a short-term HR Development Strategy for the tourism industry IGAD Region**

   Noting the existing dire need for qualified human resource among a number of IGAD Member States, there is an urgent need to design a strategy aimed at addressing this need in the short term. In view of this, a short-term HR Development Strategy that would yield results in the short to medium term will be formulated for the IGAD region. This Strategy will

   - Undertake Capacity Needs Assessment for the tourism industry within each Member State,
   - Identify existing opportunities within the region to address such skills gap both internally and across the region,
   - Assessment and Realignment of policy, regulatory and practical interventions necessary to support addressing of the gaps
   - Design a HR development action plan
   - Implement the short-term HR Development Strategy

   b. **Promote intra-regional labour mobility to bridge the short-term HR deficit in the Member countries**

   This will involve strategically encouraging and incentivising professionals from the region and African countries with the necessary skills and knowledge to both work and train the locals. This is a worldwide practice in addressing both the short-term human resource deficits and knowledge transfer. It is important to note that

   - This initiative will only be a short-term measure as the concerned Member State put in place measures to develop their tourism HR base.
   - Secondly, the scheme would only target those skills and competencies not available within the particular Member State
   - The scheme will also require the employing organizations to provide a roadmap on how and when such foreigners will be replaced with locals.

   c. **Establish intra-regional apprenticeship programme**

   This will involve establishing and popularise a “Training of Trainers (ToT) programme” that will facilitate creation of opportunities in Member States for trained labour from sister IGAD States to learn on the job before transferring the same skills back to the home country. The International Labour Organisation

(ILO) indeed recommends informal apprenticeship systems[18] in the tourism sector as a way to boost vocational attainment. This could contribute to talent being sustainably available to both large and small-scale tourism enterprises and promote greater youth entrepreneurship in tourism.

The framework will cover all levels of labour including training institutions, public sector, private sector, and tourism civil society.

2. Develop Sustainable supply of globally competitive human resource for the tourism sector in Africa

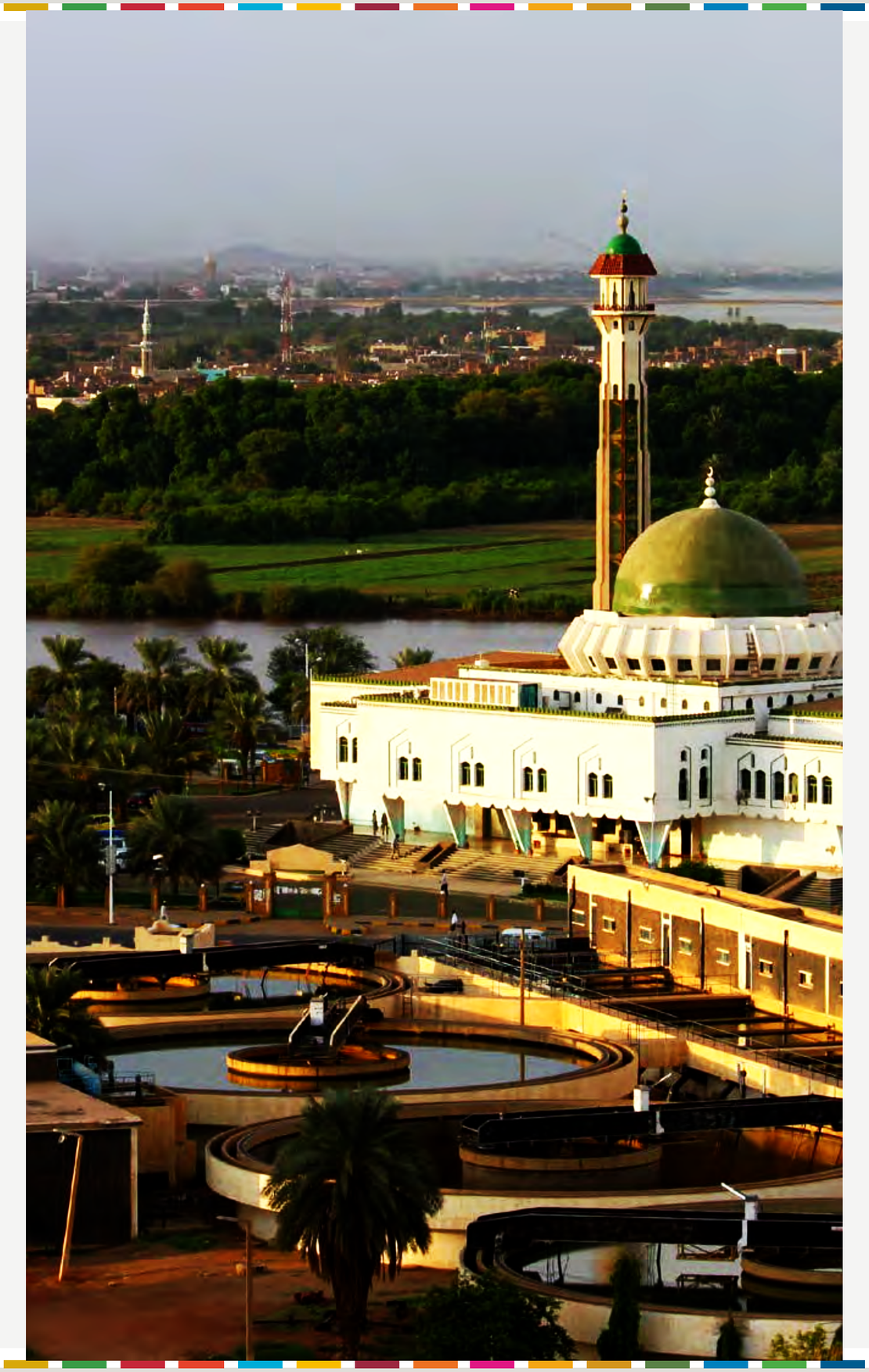
a. **Harmonize tourism training and certification amongst IGAD Member States**

Article 65 of the Abuja Treaty advocates for the creation of an environment that encourages capacity building and the use of African skills and human resources in tourism development. There is therefore need to harmonize and promote inclusive tourism training within and across the IGAD countries. Such an endeavour would enhance the practicability of training and its abilities to meet the needs of the industry. This will entail formulation of harmonized tourism training curricula across the IGAD Member States.

b. **Establish centres of excellence in tourism training across the region**

To ensure the realization of quality training for the industry within the region, it is necessary that model centres of excellence, and capacity building mechanisms benchmarked on the best practices in the world, be established in each of the IGAD Member States. To begin with, necessary policies and legislations should be formulated to allow the IGAD Member States to utilize recognized centres of excellence in the region such as Kenya Utalii College (KUC). It is envisioned that each Member State will establish at least one premier centre of excellence in tourism and hospitality training that will serve as trainer of trainers across the country.

18 According to ILO (2017b), an informal apprenticeship is a "system by which a young apprentice acquires the skills for a trade or craft in a micro [enterprise] or small enterprise learning and working side by side with an experienced practitioner […] a training agreement that is embedded in local norms and traditions of a society".



PRIORITY AREA 6:
INTRA-REGIONAL MOVEMENT OF PERSONS, GOODS AND SERVICES IN THE TOURISM SECTOR

Introduction

The potential benefits of increased movement within the IGAD region and Africa by extension cannot be overstated. This is seen as a catalyst for socio-economic development with potential positive impact on trade, boost tourism, ease demographic pressure in sending countries and increase cultural exchange tourism. In addition to these, evidences from other regions such as the European Union has shown that free movement of persons can address labour markets deficits since firms can much more easily find the necessary talent and skills that they need. This is critical to driving productivity, which, in turn, has an impact on the economic growth of countries. However, free movement of persons in the African region and IGAD in particular is partly stifled by visa hurdles and stringent entry rules, which make it strenuous for citizens to move from one country to the next.

Despite its benefits, free movement also brings its own challenges. Real fears over possible job losses and dampening of wages for local workers in destination countries must be acknowledged. These concerns are especially prevalent in Africa's upper middle-income countries. In addition, while remittances are of significant benefit to countries of origin, concerns over brain drain and the consequent loss of working-age individuals persist. Other significant risks include the potential increase of violent incidents driven by xenophobia as well as the continent's mounting security threats, including those of terrorist groups that cut across borders such as Boko Haram and al-Shabaab. These given, evidence demonstrates that African Regional Economic Communities (RECs) which have already made significant strides on free movement of persons offer useful lessons on how to effectively implement free movement regimes.

To facilitate intra-regional opportunities, a policy framework will be formulated allowing intra-regional movement of people for such a purpose.

Strategic objective

To facilitate unhindered movement of persons, goods and services within the tourism sector within the IGAD region.

Strategic Actions

1. **Adopt favourable visa regimes**
   In addition to measures targeting intra-regional travellers, IGAD Member States would need to formulate appropriate policies and legislations to ensure that the region puts in place measures to enhance travel into the region. While matters of national security take precedence, the process of obtaining visa for business and leisure tourism requires simplifying and upgrading both operationally and technologically. Possible strategies will include

   i. Visas on arrival and Visa waivers for visitors coming from target source markets.
   ii. Enabling tour operators to pre-arrange visas
   iii. Adoption of Electronic Travel Authorization (ETA) programme (an electronically-stored travel authorization for travel linked to the traveller's passport)
   iv. Adopting common visa schemes within IGAD
   v. Other considerations will include:
      - Visa free travel for visitors travelling in groups
      - Visa free travel during specific months of the year
      - Visa free entry for specific lengths of stay
      - Visa waiver programme for a particular region/ destination within a country
      - Multiple-entry visas to IGAD Member States

2. **Review and align air transport policies with tourism development strategy**
   Noting the significance of the air transportation sector to the growth of the tourism industry, IGAD Member States will need to pursue policy convergence between the two sectors. As a starting point, Member States will review and align air transport sector policies with their tourism development strategy.

   Further, for a mutually beneficial outcome for the two sectors within the region, Member States should pursue a tourism and aviation policy trade-off approach. Such policy trade-off should focus on improving efficiency along those tourism value chains linked with air transport. This would improve both the tourism sector's competitiveness and create favourable conditions for more accessible airfares and traffic. In addition, such policy trade-off should be informed by quantifying the costs and benefits of aviation liberalization not only to the airlines and to home country passengers, but also the potential economic benefits from increased inbound tourism.

   Specifically, there is need for IGAD Member States to establish bilateral air services agreements with key and emerging global tourist sources markets to facilitate direct flights and to review existing arrangements.

   To realise this goal, it would be necessary for the Member States to adopt an 'open-skies policy' as envisaged under the PIDA Priority Action Plan (PAP) for the transport sector[19] and the AU Agenda 2063 Single Air Transport Market for Africa (SATMA). This has worked for other regions like the EU, Schengen, Association of Southeast Asian Nations (ASEAN), South Pacific Island States, the Caribbean Community, and members of the Latin American Civil Aviation

19 See AU Commission/ AfDB /ECA, 2010:18

Commission. Nonetheless, it is worth noting that, in order to maximise the benefits of such a strategy, IGAD Member States should be encouraged to establish world-class air transport infrastructure.

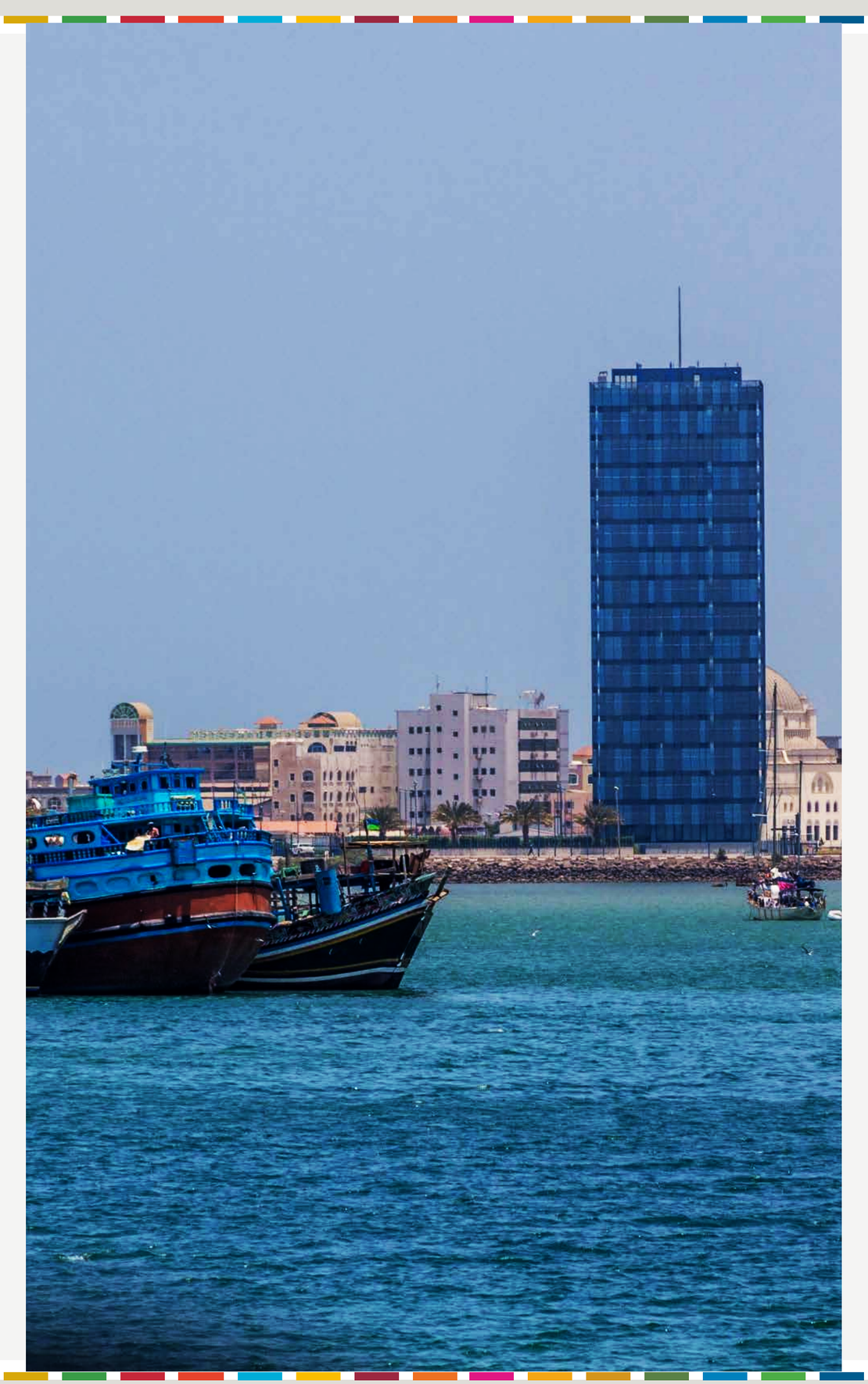
3. **Promote uptake of the IGAD Protocol of Free Movement of Persons**
As earlier indicated, free movement of people across the IGAD region represents a powerful boost to economic growth and skills development when people can travel with ease for business, tourism or education. Approved by in 2020, the IGAD Protocol on the Free Movement of Persons calls upon Member States to deepen regional integration through, among other things, creating a regime of free movement of persons, right of residence, and right of establishment. Today, five IGAD countries have signed the Protocol, namely the Republic of Sudan, the Republic of South Sudan, the Federal Republic of Somalia, and the Federal Democratic Republic of Ethiopia, and the Republic of Uganda. Efforts will be dedicated towards getting the rest of Member States sign the Protocol and ensure it is implemented across the region.

4. **Ensure safe passage across all trans frontier highways**
Road transport forms a key sector in promoting regional tourism. However, within the IGAD region, this aspect is limited by safety concerns, border crossing restrictions and lack of non-enabling insurance policies. These areas will be addressed in this new STMP. In this regard, the region will formulate a "Regional Protocol for Safe and Secure Trans Frontier Highways" stipulating the expectations for a safe and secure highways. The Tool will then be used to identify regional cross-border highways that are safe. Such highways will then be communicated through a regional portal as a guide for cross-border road travellers.

5. **Promote intra-regional trade in tourism goods and services**
It is worth noting that besides labour, supply of goods and services for the tourism sector in the IGAD region is largely sourced outside the region. In the spirit of regional integration and promotion of mutual interests, the region will seek to increase movement of goods and services.

   To start with, mapping of opportunities in and limitations for intra-regional tourism value chains will be undertaken. This will allow identification of interventions, both policy and non-policy, necessary to deepen intra-regional tourism value chains.

   A supply directory will be established identifying the existing regional suppliers for tourism products from whom players in the sector within the region can source.



PRIORITY AREA 7:
INFORMATION, KNOWLEDGE AND EXPERIENCE SHARING

Introduction

Timely availability of data and information for decision-making has been a key challenge facing the tourism sector in most of developing countries. The IGAD region is not exceptional in this matter. In this respect and given the varied levels of tourism development within the IGAD Member States, it will be essential that Member States share information, knowledge and experience with one another. To achieve this, the following actions will be pursued

Strategic Objective

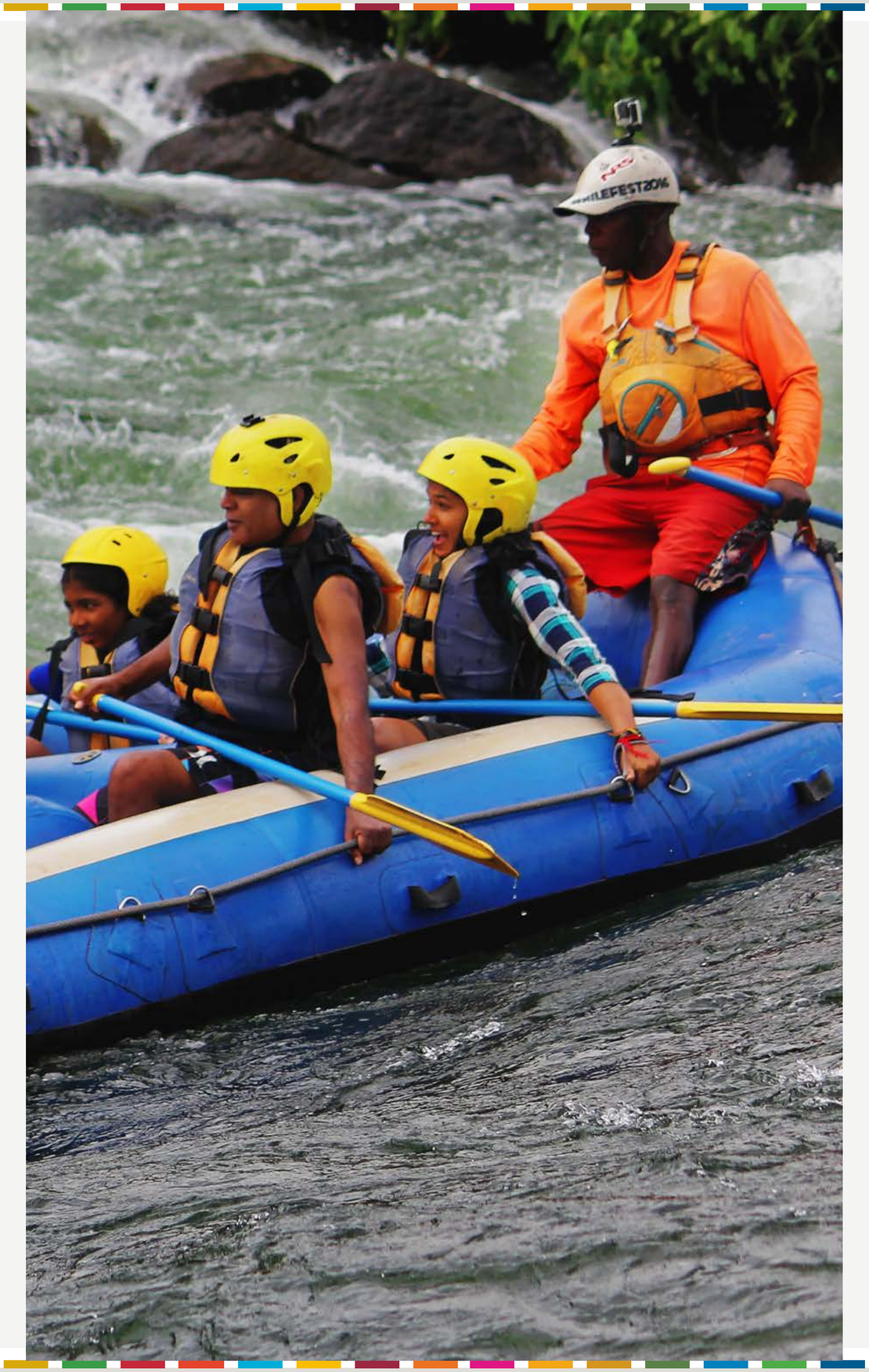
To facilitate sharing of information, knowledge and experiences among IGAD Members States for tourism development

Strategic Actions

1. **Establish an integrated tourism statistics system at regional level**
   To ensure collation and analysis of relevant tourism statistics, it is essential that an integrated and harmonized system is developed to provide policy and decision makers with comprehensive, consistent and timely data. This will be aligned with the *IGAD Regional Strategy 2021-2025* [20]

2. **Establish a regional framework for sharing experiences in tourism development**
   Noting the varied levels of tourism development across the IGAD Member States, it is essential for countries to share experiences with one another. Towards this end, themed annual forums shall be instituted under the leadership of IGAD Secretariat to ensure that Member States get opportunities to share their lessons in tourism development. This will involve public sector, private sector, civil society and the research and academia.

20 https://igad.igadportal.org/documents/27-statistics-strategy-cover



PRIORITY AREA 8:
FORMULATE A TOURISM PLANNING AND DEVELOPMENT GUIDE

Introduction

To guide planning and development of a competitive and sustainable tourism across the IGAD Member States, there is need for a harmonized approach. This is essential for a number of reasons including harmonize tourism planning and development approaches in the IGAD region, providing tourism stakeholders in Member States and at the IGAD level, with a framework for monitoring tourism development and measuring outcomes and ultimately, capacity-building tourism stakeholders in the Member States in planning and developing sustainable and competitive tourism, and guiding member states in integrating the STMP into national level tourism policies and planning. In this regard, a Tourism Development Guidebook for the IGAD region will be prepared and availed to the IGAD Member States. The Guide will take a comprehensive approach to planning and developing a tourism sector that is both globally competitive and sustainable. This guide will cover a wide range of topics relating to its planning, development, management and sustainability.

Strategic Objective

Provide the IGAD region with a tourism development toolkit to enable harmonized planning and development.

Key strategic focus areas of the guide

The guide will include,

1. **DRIVERS FOR A GLOBALLY COMPETITIVE NATIONAL TOURISM BRAND including,**
   - i. Quality and Diversified Tourism Product
   - ii. Tourism Facilities and Services
   - iii. Tourism Promotion and Marketing
   - iv. Destination Accessibility and Support Infrastructure
   - v. Tourism Human Resource Development

2. **FACTORS FOR DEVELOPING SUSTAINABLE AND INCLUSIVE TOURISM.**
   These will be focused on the UNWTO 12 aims of sustainability in tourism21 as anchored in the UNWTO Statistical Framework for *Measuring the Sustainability of Tourism (MST)*[22]

   - i. Economic viability
   - ii. Local prosperity
   - iii. Employment, decent work and human capacity
   - iv. Social equity
   - v. Visitor fulfilment
   - vi. Local control
   - vii. Community wellbeing
   - viii. Cultural richness
   - ix. Physical integrity
   - x. Biological diversity
   - xi. Resource efficiency
   - xii. Environmental purity.

3. **ENABLERS FOR COMPETITIVE AND SUSTAINABLE TOURISM DEVELOPMENT**
   - i. Tourism policy, regulatory and institutional framework
   - ii. Research and knowledge management
   - iii. A framework for financing tourism development
   - iv. Coordination mechanism
   - v. Monitoring and evaluation framework

21 https://www.globalnature.org/bausteine.net/f/6955/MakingTourismMoreSustainablePart1.pdf?fd=2
22 https://www.unwto.org/tourism-statistics/measuring-sustainability-tourism

PRIORITY AREA 9:
TOURISM DEVELOPMENT FINANCING

Introduction

The need for a sustainable funding mechanism for the sector cannot be gainsaid. This is so in view of the need to mobilize funding to support the different programmes necessary for the development of the tourism sector including product development, destination marketing and promotion, development of industry standards, experience sharing and most importantly, human resource development and training. In this regard, a resource mobilization framework with the necessary strategies will be formulated to ensure sustainable funding for the joint tourism development programmes.

Strategic Objective:

To Ensure sustainable financing of the IGAD STMP 2024-2034

Strategic Actions

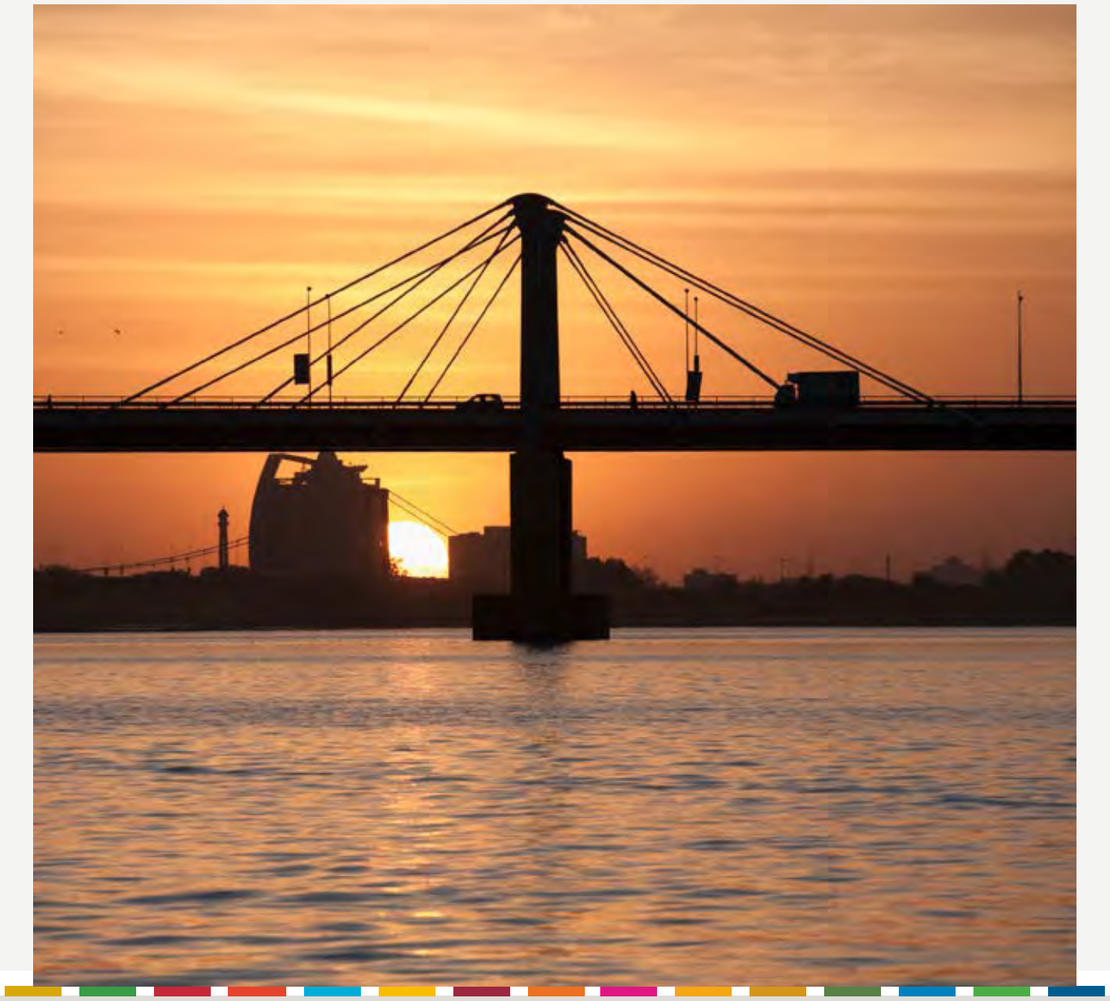
1. **Estimate the resource requirements for each STMP 2024-2034 Priority Programmes**
   A programme-based financing model will be utilised in the implementation of this STMP. This will involve isolating all the priority activities of the STMP and determining the financing requirements of each activity/programme

2. **Map potential sources of financing for each priority areas**
   Noting that different programme activities may attract interest from diverse sources of financing, potential sources will be mapped and profiled, identifying the approaches for reaching each identified financing source. Such sources would include development partners, Member States, private sector, and well-wishers, including charitable organisations.

   From the Member States, some considerations, among others, could include:

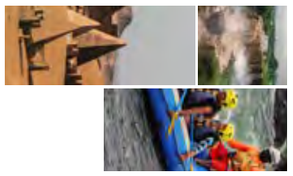
   i. **Member States Contributions**: Allocating a percentage of their tourism development budgets to the IGAD Secretariat for the implementation of the Master Plan activities
   ii. **Joint Funding for Exhibitions**: Member States offering a finance contribution for IGAD to exhibit as one destination at international meetings and tourism exhibitions.
   iii. **Block Fundraising Initiatives**: Fundraising initiatives undertaken as a block to funding agencies like the World Bank etc
   iv. **Creation of Regional Industry-Specific Bodies**: Establishing organizations like the IGAD Hotel Association, to which Member States industry associations can subscribe.
   v. **Joint Marketing and Convention Bidding**: IGAD undertaking joint marketing and bidding for international conventions to benefit member countries. Funding would go to the Secretariat to manage the conference bidding processes.

3. **Implement resource mobilization strategies**
   The identified strategies and approaches will be implemented to ensure the mobilization of the required resources for each STMP programme/activity.



04

STMP 2024-2034 Implementation Framework



4.1 INTRODUCTION

This Framework outlines the relevant actions to be undertaken within each identified Strategic Priority Area together with the means of verification using Objectively Verifiable Indicators (OVIs). The framework further indicates the institutions bearing primary responsibility and the timeframe within which the strategic actions should have been implemented.

The implementation timeline is divided into three phases: Phase 1 (1-3 years), Phase 2 (4-6 years), and Phase 3 (7-10 years). Such a phased approach will assist in prioritizing programmes and strategic actions, provide an indicative schedule of activities within the STMP implementation period, and establish timelines for both formative and summative evaluations.



4.2 STMP 2024-2034: IMPLEMENTATION FRAMEWORK

STRATEGIC OBJECTIVES	STRATEGIC ACTIONS	OBJECTIVELY VERIFIABLE INDICATORS (OVIS)	PRIMARY RESPONSIBILITY	TIME SCHEDULE AND TARGET: Key: A= 1-3 yrs / B= 4-6 yrs / C= 7-10 yrs			EST. BUDGET ('000 USD)
				A	B	C	
PRIORITY AREA 1: TRANS-BOUNDARY TOURIST PRODUCTS							
Develop integrated tourism products across the different IGAD Member Countries	Map potential flagship trans-boundary tourism products	An inventory of potential flagship transboundary tourism products across IGAD Member States	IGAD	100%			100
	Formulate product development plans for trans-boundary products	Product development plans for each of the identified trans-boundary tourism products are formulated	IGAD/NTOs of Neighbour-ing Member States	100%			100
	Implement flagship transborder tourist product development plans	Number of potential flagship transborder tourist products developed	NTOs of Neighbouring Member States	20%	40%	40%	50,000
PRIORITY AREA 2: REGIONAL TOURISM QUALITY STANDARDS							
Establish uniform quality standards for the tourism sector across the IGAD region to enhance service consistency, improve visitor experiences, and promote regional competitiveness.	Develop unified quality standards for the tourism industry	Unified quality standards for the tourism industry for IGAD region developed	IGAD Secretariat	100%			100
		Number of IGAD Member States using the unified quality standards for the tourism industry	Member States	3	6	8	8000
	Create a Regional Quality Standards Certification Programme	IGAD Regional Quality Standards Certification Programme is established	IGAD Secretariat	100%			100
		Regional Quality Standards Certification Programme is implemented	Member States	3	6	8	
PRIORITY AREA 3: TOURISM PROMOTION AND MARKETING							
Market and promote the IGAD Member States as competitive destinations for both regional and international visitors	Formulate a regional tourism marketing strategy	A regional tourism marketing strategy formulated	IGAD Secretariat	100%			100
	Pursue a unified promotional effort in the international marketplace	Joint tourism promotional programmes are designed for the international markets	IGAD Secretariat	100%			100
		Joint tourism promotional programmes for international markets are implemented	Member States	20%	40%	40%	
	Create a destination marketing strategy for the IGAD regional Market	A destination marketing strategy for the IGAD intra-regional market is developed for each Member State	IGAD Secretariat	100%			100
		Number of Member States implementing the Intra-regional Destination marketing strategy	Member States	4	6	8	8000
	Develop a Destination Management System and a Tourism Portal	A Destination Management System and a Tourism Portal for IGAD region is developed	IGAD Secretariat	100%			200

STRATEGIC OBJECTIVES	STRATEGIC ACTIONS	OBJECTIVELY VERIFIABLE INDICATORS (OVIS)	PRIMARY RESPONSIBILITY	TIME SCHEDULE AND TARGET: Key: A= 1-3 yrs / B= 4-6 yrs / C= 7-10 yrs			EST. BUDGET ('000 USD)
				A	B	C	
PRIORITY AREA 4: PROMOTING TOURISM INVESTMENT IN THE REGION							
Promote the IGAD region as an attractive investment destination for tourism investors	Prepare an Investment Promotion Guide for the IGAD region	A joint Tourism Investment Promotion Guide for the IGAD region is developed	IGAD Secretariat	100%			100
	Member States adapt the joint Tourism Investment Promotion Guide	Number of the IGAD Member States implementing the joint Tourism Investment Promotion Guides	Member States	4	6	8	8000
PRIORITY AREA 5: TOURISM HUMAN RESOURCE DEVELOPMENT							
Overall Strategic Objective: To guarantee that each IGAD Member State has adequate and qualified human resource at all levels of the tourism sector including business operations and management, destination policy, development and management, and research and academia.							
Sub-objective 1: Bridge the short-term HR needs for the tourism sector.	Formulate and implement a short-term HR Development Strategy for the tourism industry IGAD Region	A short-term HR Development Strategy for the tourism industry IGAD Region is developed	IGAD Secretariat	100%			100
		The short-term HR Development Strategy for the tourism industry in the IGAD Region is implemented in each Member State	Member States	100%			8000
	Promote intra-regional labour mobility to bridge the short-term HR deficit in the Member countries	A framework for intra-regional labour mobility is designed	IGAD Secretariat	100%			100
		Number of Member States involved in intra-regional labour mobility	Member States	2	6	8	
	Establish intra-regional apprenticeship programme	Intra-regional apprenticeship programme is designed	IGAD Secretariat	100%			100
		Number of IGAD Member States participating in the Intra-regional apprenticeship programme	Member States	4	6	8	
Sub-objective 2: Develop Sustainable supply of globally competitive human resource for the tourism sector in IGAD	Harmonize tourism training and certification amongst IGAD Member States	IGAD minimum curriculum requirements for different careers in hospitality and tourism designed	IGAD Secretariat	100%			100
		Percentage of institutions adopting the IGAD minimum curriculum requirements for different careers in hospitality and tourism	Member States	10%	40%	100%	
	Establishing centres of excellence in tourism training across the region	Criteria for Centres of Excellence in tourism training developed for the IGAD region	IGAD Secretariat	100%			100
		Number of IGAD Member States with at least one centre of excellence in tourism training	Member States	3	6	8	1500

STRATEGIC OBJECTIVES	STRATEGIC ACTIONS	OBJECTIVELY VERIFIABLE INDICATORS (OVIS)	PRIMARY RESPONSIBILITY	TIME SCHEDULE AND TARGET: Key: A= 1-3 yrs / B= 4-6 yrs / C= 7-10 yrs			EST. BUDGET ('000 USD)
				A	B	C	
PRIORITY AREA 6: INTRA-REGIONAL MOVEMENT OF PERSONS, GOODS AND SERVICES IN THE TOURISM SECTOR							
To facilitate unhindered movement of persons, goods and services within the tourism sector within the IGAD region.	Adopt favourable visa regimes	Visa regimes in each Member State reviewed and recommendations for improving Visa Openness provided	IGAD Secretariat	100%			100
		Average percentage change in the Visa Openness Index in each IGAD Member States	Member States	25%	25%	25%	
	Review and align air transport policies with tourism development strategy	Air transport policies for each IGAD Member States are reviewed and recommendations for alignment with national and regional tourism development plan	IGAD Secretariat	100%			100
		Percentage of recommendations for aligning air transport policies with national and regional tourism development plans implemented	Member States	10%	50%	100%	
	Promote uptake of the IGAD Protocol of Free Movement of Persons	Number of IGAD Member States who have signed the IGAD Protocol of Free Movement of Persons	Member States	75%	100%		8000
	Ensure safe passage across all trans frontier highways	IGAD Protocol for Safe and Secure Trans Frontier Highways developed	IGAD Secretariat	100%			100
		Percentage of IGAD regional Transboundary Highways classified as Safe and Secure.	Member States	50%	100%		1000
	Promote intra-regional trade in goods and services required for the tourism sector across its value chain.	Value Chain-based mapping of opportunities for intra-regional trade in tourism goods is undertaken and a supply directory established	IGAD Secretariat	100%			200
		Percentage of change in intra-regional trade in goods and services for the tourism sector across the IGAD region	Member States	25%	25%	75%	

STRATEGIC OBJECTIVES	STRATEGIC ACTIONS	OBJECTIVELY VERIFIABLE INDICATORS (OVIS)	PRIMARY RESPONSIBILITY	TIME SCHEDULE AND TARGET: Key: A= 1-3 yrs / B= 4-6 yrs / C= 7-10 yrs			EST. BUDGET ('000 USD)
				A	B	C	
PRIORITY AREA 7: INFORMATION, KNOWLEDGE AND EXPERIENCE SHARING							
To facilitate sharing of information, knowledge and experiences among IGAD Members States for tourism development	Establish an integrated tourism statistics system at regional level	An integrated tourism statistics system for the IGAD region is formulated	IGAD Secretariat	100%			200
		Number of Member States participating in the joint tourism statistics system	Member States	3	6	8	
	Establish a regional framework for sharing experiences in tourism development	A regional framework for sharing experiences in tourism development is formulated	IGAD Secretariat	100%			500
		Number of IGAD Member States participating in regional forums/events for sharing experiences in tourism development.	Member States	6	8	8	
PRIORITY AREA 8: FORMULATE A TOURISM DEVELOPMENT GUIDE							
Strategic Objective: Provide the IGAD region with a tourism development toolkit to enable harmonized planning and development.	Develop a tourism development guide to enable harmonized planning and development of the sector.	A Regional Tourism Development Guide for IGAD is developed	IGAD Secretariat	100%			100
		Number of national tourism development strategies/plans aligned with the Regional Tourism Development Guide	Member States	3	6	8	
PRIORITY AREA 9: TOURISM DEVELOPMENT FINANCING							
Ensure sustainable financing of the IGAD STMP 2024-2034	Estimate the resource requirements for each STMP 2024-2034 Priority Programmes	Programme-based resource requirements for each STMP 2024-2034 Priority Programme is established	IGAD Secretariat	100%			50
	Map potential sources of financing for each priority areas	A resource mobilization/financing model for the IGAD STMP 2024-2034 is formulated	IGAD Secretariat	100%			
	Implement resource mobilization strategies	Percentage of required resources for STMP 2024-2034 programmes mobilized in line with particular programme timelines	IGAD Secretariat / Member States	100%	100%	100%	1000



05

Monitoring and Evaluation Framework



5.1 INTRODUCTION

The monitoring and evaluation (M&E) framework for the STMP 2024-2034 is aimed at reporting on the implementation progress of the strategic action programmes based on a set of stated targets, goals and objectives and indicators as provided in the Implementation Matrix.

The supervision of the design, implementation and monitoring and evaluation of the STMP 2024-2034 will be undertaken at two levels: IGAD Secretariat level and national level. The Member States will be responsible for implementation of national–level projects and those jointly between States. The IGAD Secretariat will oversee implementation of joint projects. The two levels will formulate an Implementation Plan of Action (IPoA) prepared in line with the proposed time lines. These individual IPoA will form monitoring and evaluation tools for each level.

The overall M&E Plan will involve termly evaluation that will be undertaken at the end of each of the three-year implementation cycles (end of year 3 and year 6). This will facilitate identifying lessons and relevant changes to inform implementation of the next phase. An end of term evaluation will be undertaken at the end of year 10 to assess the overall results of implementation of the STMP.

Table 5.1 below provides a summary of the Monitoring and Evaluation framework the STMP 2024-2034.

TABLE 5.1: **STMP 2024-2034 Monitoring and Evaluation Plan**

	NATURE OF M&E	TIME LINE	EXPECTED OUTPUT	RESPONSIBILITY
1	STMP Implementation Cycle Reviews	End of each implementation cycle (end of year 2027 and 2030)	End of Implementation Cycle Evaluation report providing achievements, challenges, lessons learnt and plan for the next cycle.	NTOs and IGAD Secretariat
2	Final Evaluation	End of the STMP implementation Schedule (by end of year 2034)	Final STMP Evaluation report providing achievements realized, challenges faced, lessons learnt, and the way forward into the next planning cycle.	NTOs and IGAD Secretariat



06

Institutional arrangement for the implementation of STMP 2024-2034

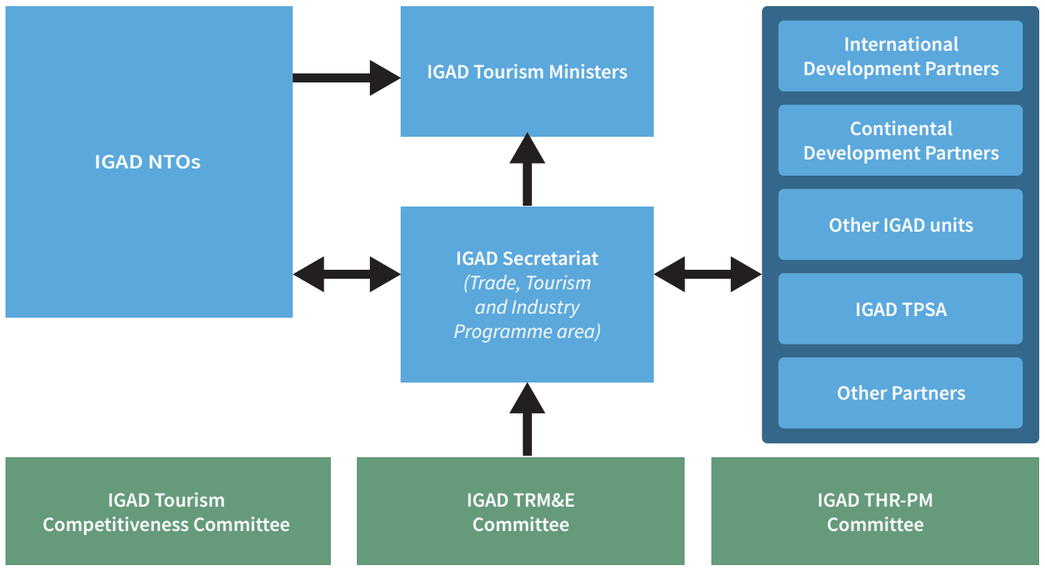


The implementation of this STMP shall involve regional and national level organs from both public sector and private sector. The STMP 2024-2034 implementation arrangement will be as follows:

1. *The Trade, Tourism and Industry programme area* of the IGAD Secretariat will spearhead implementation of the STMP
2. *The IGAD Tourism Ministers to* provide the policy framework and direction
3. *The IGAD NTOs* to serve as the executing body to implement and monitor the STMP at national level
4. *IGAD Tourism Private Sector Alliance (TPSA)* composed of representation from the tourism private sector associations in the Member States.
5. Three *STMP Implementation Committees* to implement specific STMP programmes:

    a. *The IGAD Tourism Competitiveness Committee* responsible for the focus areas affecting competitiveness of IGAD Tourism
    b. *The IGAD Tourism Resourcing, Monitoring and Evaluation Committee* with overall responsibility for securing financial resources to support the implementation of the programmes and projects of the STMP 2024-2034, and undertaking monitoring and evaluation of STMP implementation process.
    c. *IGAD Tourism Human Resource & Professional Monitoring Committee (THR-PMC)* with overall mandate on professionalism within the IGAD Tourism Sector

FIGURE 6.1 **STMP 2024-2034 Institutional Framework**



Presented below is the description of the mandate of each of the key organs.

Trade, Tourism and Industry Programme Area of the IGAD Secretariat

The Trade, Tourism and Industry Programme Area of the IGAD Secretariat shall be established to spearhead implementation of the STMP. Specifically, this unit shall be responsible for

1. Establishing the three technical committees in consultation with Member States and relevant IGAD organs.
2. Providing overall oversight for resource mobilization for regional priority tourism programmes
3. Disseminating and promoting STMP for ownership across Member States
4. Coordinating STMP implementation through the established framework within the IGAD structures
5. Overseeing the monitoring and evaluation mechanism
6. Lobbying the governments of Member States on policy dimensions of the STMP through the *IGAD Council of Tourism Ministers*
7. Implementing the STMP programmes specified for IGAD as the regional body

IGAD Sectoral Council of Tourism Ministers

The *Sectoral Council of Tourism Ministers* shall serve as the policy-making body of IGAD on tourism matters. The Council shall consist of the Ministers responsible for tourism of each Member State. The Sectoral Council shall be responsible for

1. Providing policy direction and leadership on the overall implementation of the STMP
2. Lobbying Member State governments to ensure the implementation of the STMP
3. Liaising with IGAD Secretariat on the coordination and oversight of STMP implementation

The National Tourist Organisations (NTOs)

The NTOs in Member States shall be responsible for

1. Aligning national tourism policies and plans with the regional STMP
2. Executing national government's responsibilities for the control, direction and promotion of tourism in line with the STMP.
3. Coordinating the different activities of all the bodies involved in implementation of the STMP at the national level.
4. Disseminating and promoting the STMP at the national level
5. Providing national-level support to the other STMP implementation committees in executing their mandates.



The IGAD Tourism Competitiveness Committee

This Committee shall be established and be responsible for the focus areas affecting competitiveness of IGAD Tourism. Specifically, it shall responsible for the following:

1. Planning, designing and implementing the programmes and projects related to the development of a more conducive tourism investment framework, raising the service skills and quality of tourism human resources, promoting destination and product diversification, raising destination and product quality, and moving to highly focused thematic and experiential destination and product marketing and promotions approaches.
2. Planning, designing and implementing the programmes and projects related to improving and expanding connectivity infrastructure, facilitating cross border travel, and investment in destination infrastructure development
3. Cooperating with the IGAD Tourism Resourcing, Monitoring and Evaluation Committee to ensure timely and successful undertaking of M&E for the relevant STMP projects.

The IGAD Tourism Resourcing, Monitoring and Evaluation Committee

This Committee shall be responsible for:

1. Securing financial resources to support the implementation of the programmes and projects of the STMP 2024-2034
2. Monitoring and evaluation of STMP implementation including design of M&E frameworks and tools
3. Reporting the progress of STMP implementation to the IGAD NTOS and Tourism Ministers with assistance of the IGAD Secretariat

IGAD Tourism Human Resource and Professional Development Monitoring Committee (THRPDMC)

The THRPMC shall be established with overall mandate on professionalism within the IGAD Tourism Sector and shall have the following responsibilities,

1. To develop the Minimum Curriculum Standards (MCS) and the Common Competency Standards for Tourism Professionals (CCSTP) in the IGAD region,
2. Promote, update, maintain and monitor the uptake of MCS and CCSTP in the IGAD region.
3. Develop the Minimum Standards for Tourism Training Centres of Excellence
4. Create a framework for Mutual Recognition Arrangement (MRA) on Tourism Professionals within the IGAD region
5. Facilitate the exchange of information concerning assessment procedures, criteria, systems, manuals and publications relating to this Arrangement;
6. Develop a framework to facilitate mobility of tourism professionals
7. Provide a platform for exchange of information on best practices in training for tourism professionals and for cooperation and capacity building across IGAD Member States.

The THR-PM Committee shall be composed of representatives of IGAD NTOs and appointed representatives from the National Tourism Professional Boards (NTPBs).

IGAD Tourism Private Sector Alliance (TPSA)

This body will include representatives from the tourism private sector associations in Member States. The key objectives of TPSA will be to:

1. Provide a unified voice for the regional tourism private sector on matters pertaining to regional tourism development, including engagement with the regional bodies, national level public sector and international community.
2. Enhance ethics and standards in the regional tourism industry.
3. Provide a forum for the industry to self-assess its the progress in implementing the STMP.
4. Lobby and constructively engage with governments and other entities on issues critical to the industry.
5. Provide a platform for the regional tourism private sector to share experiences.

NOTE:

To ensure convergence of approach and cross fertilisation of ideas and solutions, the structure of the committees should reflect the participation of convergence partner organisations in the public and private sector rather than only the NTOs. For example, under the IGAD Tourism Competitiveness Committee:

- ***Transportation and infrastructure agencies** of the Member States and development partners as well as private sector associations shall be encouraged to participate in the design and implementation are encouraged to participate in the discussion of programmes to enhance destination connectivity and infrastructure;*
- ***Participation of the private sector** through TPSA and other organisations need to be facilitated towards enhancing cooperation programmes relating to product development and marketing; and*
- ***Participation of the bilateral and multi-lateral development partners** and IGAD dialogue partners need to be encouraged by the IGAD Tourism Resourcing, and Monitoring and Evaluation Committee*



BIBLIOGRAPHY

African Development Bank. 2023 Africa Visa Openness Report. https://www.afdb.org/en/documents/2023-africa-visa-openness-report

International Telecommunication Union. ITU DataHub. https://datahub.itu.int/

UNWTO (2024) International Tourism and COVID-19. https://www.unwto.org/tourism-data/international-tourism-and-COVID-19

UNWTO (22 July, 2024). Global and Regional tourism performance. https://www.unwto.org/tourism-data/global-and-regional-tourism-performance

World Economic Forum (2024) Travel & Tourism Development Index. https://www.weforum.org/publications/travel-tourism-development-index-2024/

World Bank metadata (2021) International Openness International Openness, 1-7 (best) | Indicator Profile | Prosperity Data360 (worldbank.org)

W. Hospitality Group. *Hotel Chain Development Pipelines in Africa 2024*. https://w-hospitalitygroup.com/wp-content/uploads/2024/03/W-Hospitality-Group-Hotel-Chain-Development-Pipelines-in-Africa-2024.pdf

KAOPEN. *The Chinn-Ito Financial Openness Index*. (https://knoema.com/NBERCI-FOI2017/the-chinn-ito-financial-openness-index)

ICAO. *World Air Services Agreements.* https://www.google.com/search?client=firefox-b-d&q=ICAO+World+Air+Services+Agreements

IATA. *The Single African Air Transport Market (SAATM*). https://www.iata.org/en/about/worldwide/ame/saatm/

W-Hospitality. *Hotel Pipeline Report 2024.* https://w-hospitalitygroup.com/pipeline-report/

UNWTO (September, 2015). *Tourism and the Sustainable Development Goals*. Available in https://www.e-unwto.org/doi/book/10.18111/9789284417254

Commonshare.com (2024). *About Swiss Q-label*. https://www.commonshare.com/standards/swiss-q-label

The EFQM. *European Foundation for Quality Management*. https://efqm.org/the-efqm-model/

East African Community. *Common Classification Criteria for Tourism Accommodation Establishments and Restaurants.* https://www.eac.int/tourism/classification-of-hotels-and-restaurants

Asian Development Bank (2024). Afghanistan Investment Guarantee Facility (AIGF). https://www.adb.org/projects/38598-013/

International Labour Organization (2012). *Resource guide for upgrading informal apprenticeships in Africa*. https://www.ilo.org/publications/upgrading-informal-apprenticeship-resource-guide-africa

IGAD. *Regional Strategy for the Development of Statistics (2021-2025)*. https://igad.igadportal.org/documents/27-statistics-strategy-cover

UNEP and World Tourism Organization (2005). *Making Tourism More Sustainable. Guide to Policy Makers*. https://www.globalnature.org/bausteine.net/f/6955/MakingTourismMoreSustainablePart1.pdf?fd=2

UNWTO. *Statistical Framework for Measuring the Sustainability of Tourism (MST)* https://www.unwto.org/tourism-statistics/measuring-sustainability-tourism



APPENDIX LIST OF ORGANIZATIONS CONSULTED

REPUBLIC OF DJIBOUTI

- Directorate of Economy and Planning
- Office of the Permanent Secretary, Ministry of Commerce and Tourism
- University of Djibouti
- Air Djibouti
- Civil Aviation Authority
- Kempinski Djibouti hotel
- Young Civilian Sailors' Association
- National Tourism Agency
- Ministry of Economy and Finance in-charge of Industry

FEDERAL DEMOCRATIC REPUBLIC OF ETHIOPIA

- State Minister, Ministry of Tourism
- Oromia Tourism Commission
- Ministry of Tourism
- MICE Development Department, Ministry of Tourism
- Ethiopia Tourism Fund
- Ethiopia Tour Operators Association
- Ethiopia Tourist Guides Professional Association
- Addis Ababa Hotel & Tourism Professionals Association
- Hotel Management Association
- Capital Hotel, Addis Ababa
- Adwa Victory Memorial Museum
- Radisson Blu Hotel, Addis Ababa
- Ethiopia Investment Holdings

REPUBLIC OF UGANDA

- Uganda Tourism Board
- Makerere University
- Tourism Research and Development Centre
- ITER Holidays
- Uganda Association of Travel Agents
- Trade and Tourism at National Planning Authority
- Uganda Museums and Monuments
- Uganda Tourism Association
- Uganda Wildlife Association
- Ministry Tourism Wildlife and Antiquities
- Department of Tourism, Ministry Tourism Wildlife and Antiquities
- Quality Assurance, Ministry Tourism Wildlife and Antiquities
- Wildlife Conservation Department, Ministry Tourism Wildlife and Antiquities
- Uganda Hotel Owners Association
- Uganda Hotel and Tourism Training Institute

REPUBLIC OF SOUTH SUDAN

- Directorate of Tourism, Ministry of Tourism and Wildlife
- Juba City Tourism
- Directorate of Hotels, Ministry of Tourism and Wildlife
- Marketing and Public Relations, Ministry of Tourism and Wildlife
- South Sudan Trade and Investments
- Trade, Economy & Production
- Hotel and Catering Association of Southern Sudan

REPUBLIC OF KENYA

- Kenya Tourism Federation
- Kenya Association of Tour Operators (KATO)
- Kenya Utalii College
- Kenya Tourism Board
- Tourism Research Institute
- Green Africa
- Kenya Coast Tourist Association
- Kenya Association Hotel keepers and Caterers
- Tourism Professionals Association
- University of Kabianga
- Sustainable Travel & Tourism Africa (STTA)
- Tourism Investment and Financing, Ministry of Tourism and Wildlife
- Research and data coordination, Ministry of Tourism and Wildlife, State Department for Tourism
- Tourism Policy Formulation, State Department of Tourism
- Gretsa University
- Murang'a University of Technology



REPUBLIC OF SOMALIA

IGAD SECRETARIAT

Director, *Economic* Cooperation and Regional *Integration Division*















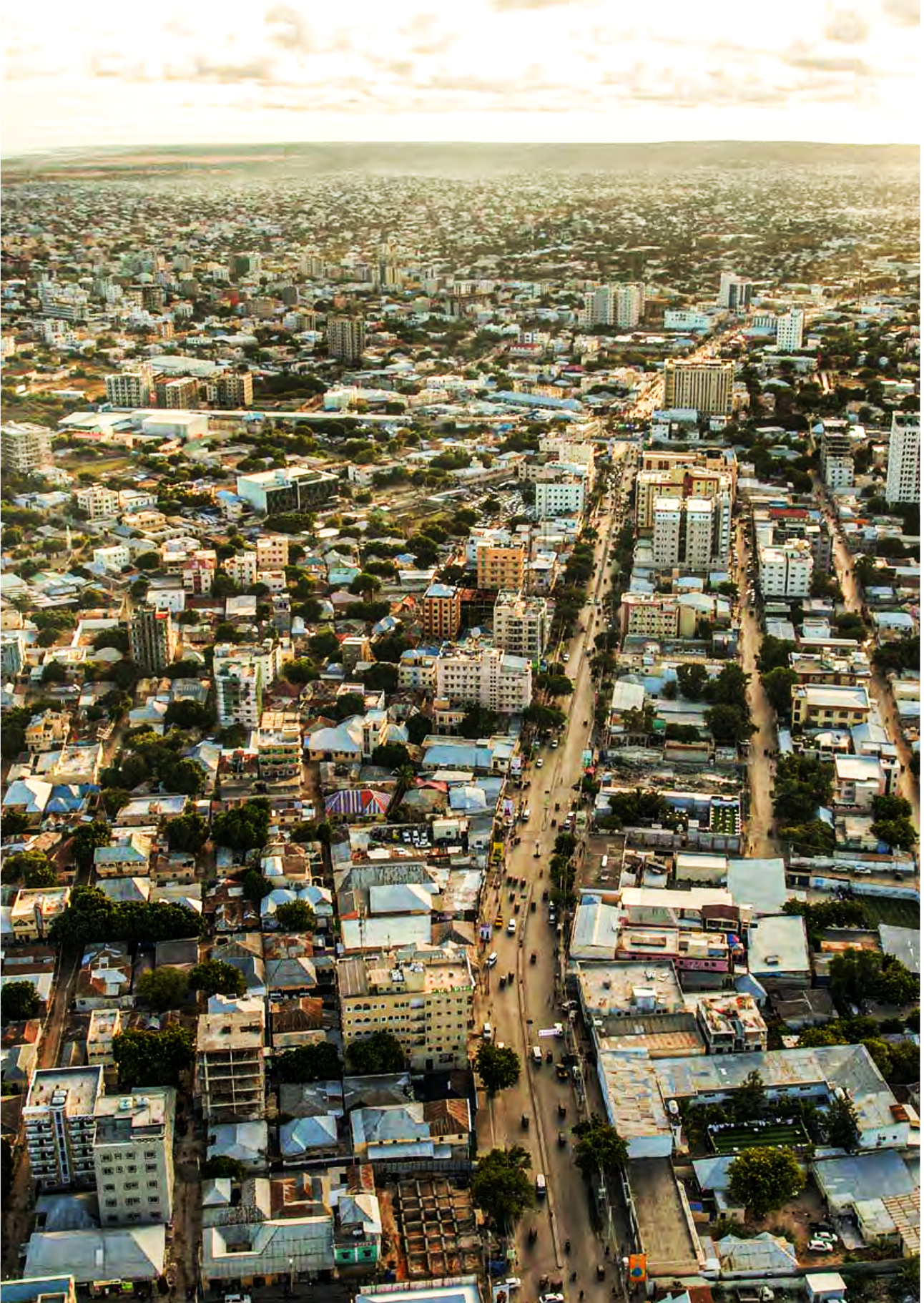


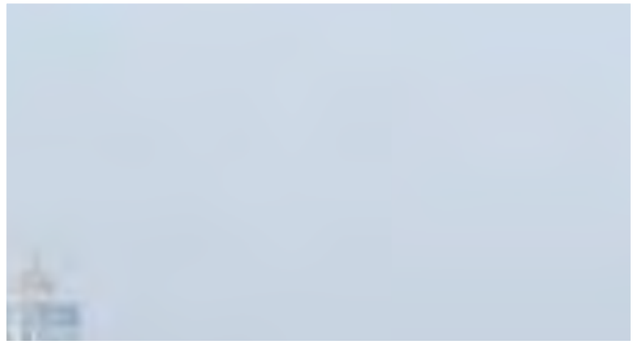






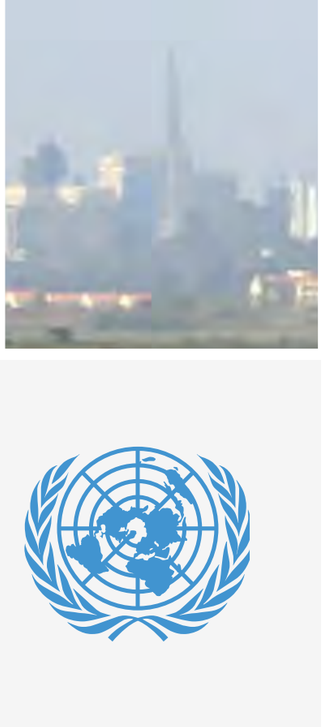






















The World Bank

Government of Ethiopia
Ministry of Tourism

Ethiopia Tourism Resource Mapping Project

Resource inventory report for Sidama Region

April 2025

KEIOS®
DEVELOPMENT
CONSULTING

KEIOS®
DEVELOPMENT
CONSULTING
Keios Srl ● Via G. Calderini n. 68 – 00196 Rome, Italy
T +39 063233296 ● info@keios.it ● www.keios.it

ISO 9001
BUREAU VERITAS
Certification

QUALITY ASSURANCE

Client: The WB | Government of Ethiopia | Ministry of Tourism
Project: Ethiopia Tourism Resource Mapping Project
Project ID: 2401 Ethiopia
Document: Resource inventory report for Sidama Region

Version	Date	Responsible	Checked	Approved
2.1	2025-02-21	Raffaele Gorjux, Lucy McCombes, Mike Fabricius, Daniel Ademe, Fabio Caporali, Giulia Gorjux, Zerihun Girma, Eyasu Erbo Dido, Tsegaye Ebabey Demissie, Wegene Taleign Ararsso. Alessandro Coppola, Patrizia DePatto, Giselda Gorjux.	Raffaele Gorjux (team leader)	Raffaele Gorjux (managing director Keios)
2.2	2025-04-16	Raffaele Gorjux, Lucy McCombes, Mike Fabricius, Daniel Ademe, Fabio Caporali, Giulia Gorjux, Zerihun Girma, Eyasu Erbo Dido, Tsegaye Ebabey Demissie, Wegene Taleign Ararsso. Alessandro Coppola, Patrizia DePatto, Giselda Gorjux.	Raffaele Gorjux (team leader)	Raffaele Gorjux (managing director Keios)

FIle: 2401 2.2 Resource inventory report for Sidama Region (16-04-2025)

All photographs in this document have been taken by our team, unless explicitly stated otherwise

Table of contents

Executive summary....3

1. Introduction....6

2. Tourism context....8
- 2.1 National tourism landscape....9
- 2.2 Role of tourism in Sidama....12

3. Geographical context....14
- 3.1 Geomorphology and hydrography....16
- 3.2 Land cover....18
- 3.3 Administrative boundaries....20
- 3.4 Human settlement....22
- 3.5 Population distribution and density....24

4. Tourism infrastructure and facilities....27
- 4.1 Access to Sidama....28
- 4.2 Mobility within Sidama....30
- 4.3 Primary tourism facilities....32
- 4.4 Secondary tourism facilities....34
- 4.5 Tertiary tourism facilities....38

5. Inventory of natural, historical and cultural assets....41
- 5.1 Geology and landscape....44
- 5.2 Wildlife and biodiversity....56
- 5.3 Tangible cultural and historical heritage....66
- 5.4 Intangible cultural heritage....74

6. Environmental and social context....80
- 6.1 Nature conservation in Sidama....81
- 6.2 Environmental issues....84
- 6.3 Social issues....86

7. Strengths, weaknesses, opportunities and threats....88

Appendixes....92
- Appendix A – Site Visits....93
- Appendix B – Geo database structure....94

Maps

Map 1: Geomorphology and hydrography....17
Map 2: Land cover....19
Map 3: Administrative boundaries....21
Map 4: Human settlement....23
Map 5: Population density....25
Map 6: Access to Sidama....29
Map 7: Mobility within Sidama....31
Map 8: Primary tourism facilities....33
Map 9: Secondary tourism facilities....35
Map 10: Tertiary tourism facilities....39
Map 11: Natural, historical and cultural assets....43
Map 12: Geology and landscape....45
Map 13: Wildlife and biodiversity....57
Map 14: Tangible cultural and historical heritage....67
Map 15: Intangible cultural heritage....75
Map 16: Nature conservation....83
Map 17: Site visits....93

Abbreviations and acronyms

CBI	Centre for the Promotion of Imports
EPA	Environmental Protection Authority
EWCA	Ethiopian Wildlife Conservation Authority
GDP	Gross Domestic Product
IBA	Important Bird Area
IGAD	Intergovernmental Authority on Development
MICE	Meetings, Incentives, Conferences and Exhibitions
MoT	Ministry of Tourism
NGOs	Non-Governmental Organizations
SCTSB	Sidama Culture, Tourism and Sport Bureau
SDA	Sidama Development Association
SDGs	Sustainable Development Goals
SNNPR	Southern Nations, Nationalities, and People's Region
SWOT	Strengths, Weaknesses, Opportunities and Threats
UNECA	United Nations Economic Commission for Africa
UNESCO	United Nations Educational, Scientific and Cultural Organisation
UNICEF	United Nations Children's Fund
UNWTO	United Nations World Tourism Organization
USA	United States of America
USD	United States Dollars
USPs	Unique Selling Points
VFR	Visit Friends and Relatives
WB	World Bank

Executive summary

Executive summary

The Ethiopia Tourism Resource Mapping Project aims to comprehensively assess and document the tourism assets within Ethiopia, with an initial focus on the Sidama Region. This initiative seeks to identify and evaluate both natural and cultural resources to inform sustainable tourism development strategies. The primary objectives include creating an inventory of tourism assets, assessing their current state and market readiness, and providing strategic recommendations to enhance the region's tourism potential. The methodology employed encompasses field surveys, stakeholder consultations, and the analysis of existing literature and data sources. A pivotal component of this approach is the utilisation of Geographic Information System technology to construct a comprehensive geodatabase of the Sidama Region. This geodatabase is designed with a scalable structure, facilitating its expansion to encompass other regions across the country.

This report serves as a comprehensive documentation of Sidama's natural and cultural assets, aiming to provide a detailed inventory that highlights the region's tourism potential, aiming at promoting sustainable tourism development, attracting investment, and fostering community engagement, ultimately contributing to the region's socio-economic growth.

Ethiopia's tourism sector is driven by its rich cultural heritage and diverse natural landscapes. The Sidama Region, located in the southern part of the country, can play a pivotal role in this growth due to its unique attractions and cultural significance.

Sidama Region covers around 6,938 square kilometres, with landscapes ranging from low-lying areas near Lake Abaya at about 1148 meters above sea level (asl) to the highlands of Mount Garamba, reaching approximately 3232 meters. The region features a mix of flat plains, hills, and mountains, creating a diverse environment that supports different plant and animal life. Sidama is also rich in water resources, with major rivers like Logita, Gambelto, and Gidawo, alongside lakes such as Abaya and Hawassa. These natural assets contribute to the region’s beauty and provide opportunities for eco-tourism and outdoor activities.

Accessibility within Sidama is facilitated by both road and air transport. The region is traversed by the African Trans International Highway, connecting Cairo to Cape-town, which enhances regional connectivity. Hawassa Airport provides frequent air links between Sidama and Addis Ababa, offering opportunities for increased tourist inflow. Despite these connections, challenges persist in the form of limited accommodation facilities outside Hawassa, insufficient tourism services, and underdeveloped assets.



Sidama boasts a rich array of natural attractions, including lakes such as Hawassa and Abaya, mountainous terrains like Mount Garamba, and waterfalls exemplified by Logita. The region is also home to diverse wildlife, hot springs, including endemic bird species as well as mammals. The biodiversity is further enriched by protected areas, including Loka Abaya National Park and Senkelle Swayne's Hartebeest Sanctuary, which offer opportunities for conservation-focused tourism.

Culturally, Sidama people are renowned for their intangible heritage, including the Fichee-Chambalaalla festival, recognized by UNESCO as world heritage. The region also hosts several archaeological sites, including the megalithic stelae of Dara and sacred sites associated with traditional Sidama beliefs. The cultural landscape is further enriched by traditional practices such as the Moote leadership system, Sidama weaving traditions, and age-old coffee cultivation and related ceremonies. These elements collectively create a strong cultural identity that can be leveraged for immersive and sustainable tourism experiences.

However, challenges such as inadequate infrastructure, limited marketing, and underdeveloped tourism products and services hinder the region's full potential. Opportunities exist to capitalize on Sidama's traditional culture, natural attractions, and strategic location to attract both domestic and international tourists.

Based on these insights, a concluding analysis of strengths, weaknesses, opportunities and threats has been developed, to lay the foundation for the next steps. The forthcoming Product Development Plan will further build on this knowledge and outline specific projects and actions aimed at transforming Sidama into a premier tourist destination, ensuring that tourism growth aligns with cultural preservation and environmental sustainability.

Figure 1 (previous pages): Colobus Monkey at Amora Gedel Park, Hawassa
Source: Rod Waddington via Wikimedia Commons, CC BY 2.0.
Figure 2 (left page): Aroresa Rock Art site, and
Figure 3 (right page): Traditional leadership



1. Introduction

Introduction

Ethiopia is endowed with exceptional cultural and natural assets that possess the potential to attract visitors from across the globe. From the iconic rock-hewn churches of Lalibela to the majestic landscapes of the Simien Mountains, the country's heritage and natural beauty are unparalleled. These assets form the cornerstone of a sustainable tourism industry, which can offer substantial economic, social, and cultural benefits to local communities and the nation as a whole.

In recent years, Ethiopia's tourism sector has experienced significant fluctuations, marked by both promising growth and notable setbacks. The period from 2016 to 2018 saw an upward trajectory in international tourism receipts, reflecting increasing global interest in the country. However, this momentum was disrupted in 2020 due to the COVID-19 pandemic, which had a profound impact on international travel and led to a sharp downturn in tourist arrivals.

Currently, internal conflicts in regions such as Tigray, Amhara, and Oromia present challenges to tourism development, rendering many areas unsafe for visitors. Despite these challenges, conflicts eventually find resolution, and a return to stability in Ethiopia is anticipated. When peace is restored, the country will be well-positioned to welcome visitors once more, showcasing its unity and the rich cultural heritage of its diverse ethnic groups. This anticipated return to stability will create favourable conditions for tourism growth, underscoring the need for strategic preparation and investment in the sector to ensure readiness for a resurgence in tourism activity.

The revival of Ethiopia's tourism industry will contribute not only to economic development and job creation but also to the improvement of livelihoods and community well-being. The growth of the sector should foster the preservation of cultural heritage and natural environments, thereby cultivating a sense of pride and ownership among Ethiopians. As the nation looks forward to a peaceful future, it is essential to strategise effectively and maximise the benefits of tourism for all stakeholders.

In line with these efforts, the World Bank (WB) has expressed its commitment to supporting the development of Ethiopia's tourism sector. A key aspect of this commitment is the Ethiopia Tourism Resource Mapping Project, which aims to **establish a strategic foundation for enhancing tourism, focusing initially on Sidama Region.** Keios (Italy) has been commissioned by the WB to undertake this initiative, beginning with a comprehensive assessment of the existing and potential tourism assets in the Sidama Region, followed by the formulation of a product development plan.

This Resource Inventory Report marks the completion of the second phase of the assignment based on a systematic gathering of comprehensive information on tourism resources, infrastructure, and facilities within the target region. The National tourism landscape (section 2) highlights the broader framework within which the sector operates, examining strategic priorities, economic contributions, and current challenges. This is followed by an exploration of the Role of tourism in regional development (section 2.2), which underscores its significance in fostering economic growth, cultural preservation, and community engagement. The Geographical and human landscape (section 3) delves into the physical and demographic characteristics that define the region, providing a foundational understanding of the environmental and societal context. This is complemented by an analysis of Tourism infrastructure and facilities (section 4), focusing on access, mobility, and the amenities that shape the visitor experience.

The detailed inventory of tourism assets (section 5) forms the core of the report, cataloguing natural and cultural attractions while identifying existing tourism initiatives. The inventory is organised in four major categories of geological assets, wildlife and biodiversity, tangible and intangible cultural heritage. This inventory is instrumental in recognising areas of potential enhancement and sustainable utilisation.

The report then addresses environmental and social issues and climate impacts (section 6), emphasising the need for balance between tourism development and ecological preservation. Finally, the Strategic evaluation (section 7) integrates findings from the previous sections, presenting a SWOT analysis, gap identification, and a preliminary market segmentation and a set of product development strategies and concepts to guide the preparation of the Product Development Plan in the next phase of work.

Finally, section 7 integrates findings from the previous sections, presenting a concluding analysis of strengths, weaknesses, opportunities and threats to lay the foundation for the forthcoming Product Development Plan.

Figure 4 (left pages): Fiche Chambalaalla celebrations

Source: Henok Aklilu via Wikimedia Commons, CC BY-SA 3.0.

Figure 5 (following page): Church of Saint George, Lalibela

Source: - Zhu via Wikimedia Commons, CC BY-SA 2.0

2. Tourism context

2.1 National tourism landscape

Tourism has been integrated into Ethiopia's broader development agenda, particularly within the Ten-Year Development Plan (2021–2030). Recognising the sector's capacity to drive economic transformation, the plan identifies tourism as a critical lever for job creation, foreign exchange generation, and community empowerment. This alignment underscores the government's commitment to developing a competitive, sustainable tourism sector that balances economic growth with cultural preservation.

Governance

Ethiopia operates under a federal parliamentary system, with governance distributed across national, regional, and local levels. This structure reflects the country's ethnic federalism, which grants substantial autonomy to regional states. The Ministry of Tourism (MoT) serves as the primary authority for tourism development at the national level. Reformed in 2022, the MoT plays a pivotal role in policy formulation, tourism promotion, and coordination with stakeholders to enhance the sector's strategic direction.

The MoT's mandate includes comprehensive responsibilities for tourism management and promotion, such as marketing the country's tourism resources domestically and internationally; developing and managing tourism infrastructure and information centres; establishing and administering a tourism fund; and formulating branding strategies for tourism products and services. The Ministry is also tasked with setting and supervising standards for service providers, ensuring community benefit-sharing, addressing training and capacity gaps, conducting research, and promoting private-sector participation in the development of both existing and new tourist destinations.

It is supported by Regional Bureaus , which adapt national strategies to align with local contexts. These bureaus identify and promote regional attractions, regulate local tourism services, and engage with communities to develop tourism products.

At the local level, *woredas* (districts), and *kebeles* (wards) administrations (see section 3.3) are instrumental in managing tourism resources. Their responsibilities include the preservation of cultural and natural heritage, licensing tourism operators, and implementing community-based tourism initiatives. This decentralised approach enables localised responses to tourism development while aligning with national priorities.

Collaboration between public institutions and private organisations is critical to addressing gaps in infrastructure, capacity building, and marketing. International partnerships with entities such as CBI, IGAD, UNECA, UNESCO, UNWTO, WB, and others further support the development of policies and projects that align with global standards and sustainability goals.

Policies

Ethiopia's tourism sector is guided by a comprehensive framework of policies designed to harness its cultural and natural assets for sustainable development. These frameworks aim to position tourism as a key driver of economic growth, cultural preservation, and community empowerment.

National Tourism Policy (2009). The policy provides the foundational vision for the sector, emphasising: economic growth through income generation, employment creation, and foreign exchange earnings; cultural and environmental preservation via sustainable tourism practices; community participation to ensure equitable benefits from tourism; and infrastructure development to enhance accessibility and attract investment. The tourism policy is currently being updated with an advanced draft under development. First of all, Ethiopia looks now at tourism as a key, priority economic development sector. Furthermore, the key highlights of the new policy will include, among others, a focus on new markets beyond the traditional ones, such as Eastern Europe and Asia; improved collaboration with national and international stakeholders, including strategic partnership at the regional level; a strong focus on sustainability; digital marketing, and expanded capacity building.

Sustainable Tourism Master Plan (2015–2025). This master plan outlines a structured approach to making Ethiopia one of Africa's top five destinations by 2025. Its ten pillars include policy and institutional reform, product diversification, marketing, human resource development, and sustainability. Key objectives focus on strengthening governance, expanding tourism facilities, and fostering community-based tourism.

Tourism Marketing Strategy for Ethiopia (2016-2020). It identifies core target market segments, with tailored marketing approaches for different traveller profiles, including intrepid explorers, adventure sport enthusiasts, cultural tourists and business travellers. The strategy emphasises digital marketing, international trade collaborations, and product development, such as the Great Origin Routes and Meetings, Incentives, Conventions and Exhibitions (MICE) tourism. Sustainability and community involvement are integral, ensuring long-term tourism sector resilience.

Ten-Year Development Plan (2021–2030). Integrated into Ethiopia's broader socio-economic goals, the plan identifies tourism as a strategic sector for driving structural transformation. The plan prioritises infrastructure development, private-sector engagement, and capacity building to enhance the sector's competitiveness. It also includes sustainability measures to balance tourism growth with environmental and cultural conservation.

IGAD Sustainable Tourism Master Plan (2024–2034). As a member of the Intergovernmental Authority on Development, Ethiopia benefits from regional collaboration to

position the Horn of Africa as a competitive tourism destination. This plan promotes cross-border tourism, infrastructure investment, and human resource development, while emphasising sustainability and community inclusion. While these frameworks provide a robust foundation, their effective implementation faces hurdles such as limited funding, insufficient institutional capacity, and overlapping governance responsibilities.

National MICE Vision and Strategy for Addis Ababa 2020–2030. It outlines Ethiopia's plan to develop Addis Ababa into Africa's leading MICE destination by 2030. The strategy emphasises the role of the Ethiopia Convention Bureau in coordinating marketing, bidding, product development, and capacity building. The plan identifies six key goals, including increasing delegate volume, value, and length of stay; improving seasonality and geographical spread; and enhancing redistribution of benefits across the country. While Addis Ababa is the primary focus, the strategy anticipates expanding MICE activities to secondary cities in later phases. Hawassa is specifically mentioned among the secondary cities—alongside Bishoftu and Bahir Dar—as a future destination for hosting regional meetings; this approach aims to extend economic benefits beyond the capital and stimulate tourism-related development in other parts of the country.

Doing business

Ethiopia ranks 159th out of 190 economies in the WB's Doing Business Ranking[1], reflecting significant challenges in its business environment. The country's weak points include difficulties in starting a business, with cumbersome registration processes, and issues related to obtaining construction permits, which involve lengthy procedures and high costs. Additionally, Ethiopia faces challenges in enforcing contracts and dealing with insolvency, which further complicates the business landscape. These factors contribute to a regulatory environment that is less conducive to the establishment and operation of local firms compared to many other countries.

Tourism performance and demand

Ethiopia's tourism sector has experienced significant fluctuations over the past decade, shaped by internal and external challenges as well as periods of promising growth. The Tourism Satellite Account[2], established in 2024 to provide comprehensive data on the sector's performance in 2019, highlights tourism's critical contributions to the economy, including employment, foreign exchange earnings, and GDP.

In 2019, tourism directly contributed 2.7% to the national GDP, supporting over 2.1 million jobs, which accounted for 3.88% of national employment. International arrivals totalled approximately 811,000 in the same year, with leisure and holiday travel comprising 37.5% of visits. Visitors originated primarily from Africa (30%), Europe (29.9%), and North America (18.9%), with the United States, the United Kingdom, and China representing significant source markets.

Tourists visiting for leisure and cultural exploration were attracted to Ethiopia's historical and natural assets, while business and conference travel accounted for a substantial portion of the international market. The median length of stay was eight nights, with average daily expenditure at USD 128. Despite the notable contributions of inbound tourism, domestic tourism was a key driver of the sector, with over 8.8 million domestic trips recorded in 2019.

The COVID-19 pandemic disrupted this growth, with international arrivals declining to 270,000 in 2020 and then recovering to 518,000 in 2021, 896,000 in 2022 and reaching 1,077,000 in 2023. The sector has shown resilience, with gradual recovery supported by government efforts to enhance tourism infrastructure and marketing initiatives[3].

Key attractions

Ethiopia offers a vast and diverse range of attractions that reflect its rich cultural heritage, complex history, and varied natural landscapes. Among the most prominent cultural and historical sites are the rock-hewn churches of Lalibela, a testament to medieval religious architecture and devotion; the ancient obelisks of Aksum, remnants of a once-powerful empire that played a major role in trade and regional politics; and the fortified castles of Gondar, which reflect Ethiopia's imperial past and architectural influences from both Europe and the Middle East.

Natural heritage is equally important in defining Ethiopia's tourism potential. The Simien Mountains National Park, inscribed as a World Heritage Site, features dramatic escarpments and high-altitude plateaus populated by endemic species such as the Walia ibex and the Ethiopian wolf. The Danakil Depression offers a stark contrast with its extreme geology, including active volcanoes, sulphur springs, and expansive salt flats—making it one of the most inhospitable yet fascinating places on Earth. Lake Tana, the largest lake in Ethiopia and source of the Blue Nile, is another natural landmark of great ecological and cultural significance, hosting centuries-old island monasteries.

Ethiopia's intangible cultural heritage is a core component of its tourism appeal. Annual religious and cultural festivals, such as Timkat (Ethiopian Epiphany), Meskel (the Finding of the True Cross), and Enkutatash (New Year), draw large numbers of both domestic and international visitors. These events offer immersive experiences of music, dance, processions, and traditional food. The Fichee-Chambalaalla New Year festival of the Sidama people, recognised by UNESCO, further illustrates the country's ethnic and cultural diversity (see section 5.4).

In terms of biodiversity and landscape diversity, the Great Rift Valley supports a chain of lakes that are significant for birdwatching, aquatic sports, and leisure tourism. The Bale Mountains, with their high-altitude plateaus, cloud forests, and alpine meadows, are home to unique flora and fauna and attract trekkers and naturalists. The Omo River basin offers opportunities for cultural encounters with agro-pastoralist communities and river-based tourism activities, including rafting and guided exploration of prehistoric archaeological sites.

Other emerging attractions include the Sof Omar caves in the south-east, one of the longest cave systems in Africa; the Awash National Park with its waterfalls and hot springs; and the historical town of Harar, considered the fourth holiest city in Islam and home to over 80 mosques and numerous shrines. Urban centres such as Addis Ababa are also developing as cultural hubs, with institutions like the National Museum of Ethiopia, the Ethnological Museum, and the Unity Park showcasing the country's historical narratives and modern identity.

Challenges and opportunities

Ethiopia's tourism sector holds significant potential due to its rich cultural heritage and diverse natural landscapes. However, its international competitiveness remains limited when compared to other African destinations. According to the World Economic Forum's Travel & Tourism Competitiveness Index, Ethiopia scores above average in areas such as safety and security, price competitiveness, and environmental sustainability. Yet, it lags in critical areas like health and hygiene, ICT readiness, and tourist service infrastructure.

Despite possessing numerous UNESCO World Heritage Sites and unique cultural festivals, Ethiopia's tourism offerings are underdeveloped, and the sector suffers from fragmentation and inconsistent service quality. This has resulted in lower tourist arrivals and revenues compared to neighbouring countries like Kenya and Tanzania.

To enhance its competitiveness, Ethiopia must invest in improving tourism infrastructure, develop comprehensive marketing strategies, and foster collaboration among stakeholders. By addressing these areas, Ethiopia can better position itself in the international tourism market and fully leverage its abundant attractions

Branding and promotion

Ethiopia's tourism brand[4], "Land of Origins", encapsulates the country's unique cultural and historical identity while highlighting its position as the cradle of humanity. This identity draws attention to the nation's unparalleled heritage, including the discovery of ancient hominids like Lucy, and its rich religious, cultural, and natural landscapes.

The brand identity employs symbolic elements such as the colours of the national flag and a Ge'ez[5]-inspired typeface to underline Ethiopia's authenticity and depth. The tree motif signifies growth and deep cultural roots, reinforcing Ethiopia's distinctiveness in the global tourism market.

Efforts to promote this brand focus on enhancing Ethiopia's visibility through digital marketing platforms, participation in international tourism fairs, and targeted campaigns in key source markets. Collaborations with organisations like CBI, IGAD, UNECA, UNESCO, UNWTO, WB, and others support Ethiopia's objective to position itself as a leading tourism destination in Africa.



Figure 6 : Ethiopia's tourism "Land of Origins" Logo

Source: Ministry of Tourism

2.2 Role of tourism in Sidama

Sidama is the second smallest regional state in Ethiopia, with a total surface of 6,695 km^2 and more than 3 million inhabitants[6]. Historically, the Sidama people have actively promoted the use of Sidaamu Afoo, their Cushitic language, alongside efforts to establish administrative and cultural autonomy.

Hawassa, the capital city of Sidama, is not only the administrative and economic centre of the region but also a pivotal hub for tourism and cultural exchange. With a population of approximately 315,000 as of 2021[7], it is the largest city in the region and serves as a vibrant urban centre. Situated on the shores of Lake Hawassa, the city is renowned for its scenic beauty, attracting both domestic and international visitors. The city offers a mix of modern and traditional attractions, including the bustling fish market, the Gudumale Park, and the vibrant cultural performances that often take place in its open spaces. Hawassa is also home to several accommodation options, ranging from luxury resorts to budget-friendly lodgings, catering to a diverse range of tourists. As a gateway to the Sidama region, the city serves as a starting point for exploring nearby attractions such as the Wondo Genet hot springs, the Sidama Highlands, and coffee farms. With its strategic location along the African Trans International Highway, connecting Cairo to Cape Town, and access to Hawassa Airport, the city plays a crucial role in facilitating tourism and trade, further solidifying its importance in the region.

Sidama's diverse landscape, shaped by geological processes from the tertiary period, includes flat plains, steep slopes, mountains, valleys, rivers, and lakes. Elevations range from 1148 meters at Lake Abaya to 3232 meters at Mount Garamba. The region's abundant water resources feed into three major drainage systems: the Rift Valley Lakes, Genale and Gidabo basins. Agriculture remains the backbone of Sidama's economy, supported by cash crops such as coffee, khat, and tobacco. Hawassa serves as a key hub for tourism and industrial activities, enhancing the region's economic profile.

Sidama's tourism sector is primarily driven by **domestic visitors**, constituting approximately **80% of the total market**. These tourists predominantly travel to Hawassa and nearby recreational areas for weekend getaways. Key attractions include Lake Hawassa, Wondo Genet hot springs, and cultural experiences such as coffee production and the Fichee-Chambalaalla festival[8]. **International tourists**, accounting for around **20% of visitors**, primarily come from Europe, North America, and the Middle East. European tourists, particularly from Germany, France, and Italy, seek cultural and eco-tourism experiences, including coffee tourism and visits to Sidama's natural landscapes. Visitors from the Middle East are primarily drawn to Wondo Genet hot springs for health and relaxation purposes. The average stay for international visitors is typically 2-3 days, focusing on cultural and nature-based activities in accessible areas like Hawassa, while domestic tourists have a stronger emphasis on leisure and community interaction, with an average stay of 2 days (see also section Errore: sorgente del riferimento non trovata).

Tourism contributes significantly to the regional economy, particularly through employment in hospitality and related services. Around 100 accommodation establishments operate in Hawassa alone, catering to a mix of budget and mid-range visitors. Tourism supports sectors such as food and beverage, local crafts, and tour guiding, although these are not yet fully optimised for income generation. International visitors spend an average of USD 100 per day, contributing to an estimated annual tourism revenue of USD 40 million. In comparison, domestic visitors spend on average USD 55 per day, contributing to an estimated tourism revenue of USD 75 million[9]. However, these figures are constrained by low off-peak tourist volumes and limited service diversification.

The **Sidama Culture, Tourism and Sport Bureau (SCTSB)** oversees tourism in the region through its three divisions: tourism and marketing, tourism service and inspections, and tourism destination and attraction. The SCTSB has identified key tourism routes on its official website, including the Wondo Genet route (featuring birdlife, dense forests, and hot springs), the Sidama Highlands route (highlighting Garamba Mountain and Hafuursa Hill), the Yirgalem route (including Loka Abaya National Park and Aregash Lodge), the Alatta Daarra route (showcasing the Steale of Daarra and Sidama coffee), and the Waterfalls route (featuring Logita and Bo'nara waterfalls). These routes, along with a recently developed astro-tourism initiative, aim to diversify the region's offerings and enhance visitor experiences.

The Sidama Development Association (SDA) plays a complementary role in promoting sustainable tourism and improving livelihoods in the region. Through community-based projects, such as the Hawassa Fish Market, the Association focuses on education, health, agriculture, and infrastructure development, fostering partnerships with government entities and international organisations. These efforts aim to empower local communities, ensuring they earn economic benefits while preserving cultural and natural resources.

Women and youth play a crucial role in Sidama's tourism sector, contributing significantly to hospitality, cultural preservation, entrepreneurship (e.g. fish vendors, handcrafts), and community-based tourism projects. Local initiatives, including capacity building by the Sidama Development Association, national and international non-profits, have enabled women and young people to engage in small businesses, tour guiding, and cultural activities. As the tourism sector grows it can provide increasing empowerment opportunities for women, youth and communities.

Seasonal patterns strongly influence the region's tourism economy, with peak periods during major festivals such as New Year celebrations and the Fichee-Chambalaalla Festival. Domestic tourism spikes during holidays and weekends, while international visitor numbers peak during Ethiopia's dry season from October to March. The region faces challenges in sustaining tourist volumes outside these peak periods, limiting year-round economic impact. Additionally, underdeveloped product diversification and promotion efforts hinder the ability to increase per-visitor expenditure. While the current tourism economy is a valuable contributor to Sidama's socio-economic landscape, further investment in product enhancement and market diversification will be essential to fully capitalise on its unique assets and increase its economic footprint.

Figure 7 (following pages): Fishing boats in Lake Hawassa
Source: Abiyot Assefa via Wikimedia Commons, CC BY-SA 4.0.

3. Geographical context



3.1 Geomorphology and hydrography

Sidama lies north-east of Lake Abaya and south-east of Lake Hawassa. It borders Oromia to the north, east, and south, with a short boundary to the South Ethiopia Regional State in the south. The Bilate River separates it from the South Ethiopia Regional State to the west.

The region's diverse geomorphology, shaped by the **Great Rift Valley**, includes rugged central-eastern **mountains**, flat western **plains** near Lake Hawassa, and inward-sloping escarpments. Elevations in the flat western area, stretching from Wondo Genet to the western side of Lake Hawassa, range between 1500 and 2000 meters asl. In contrast, lowlands below 1500 meters, primarily in the north-west, constitute about 10% of the area, while highlands exceeding 2500 meters account for 21% of the territory. This altitudinal variation influences land use and vegetation, with the highlands, including Garamba Mountain—the highest peak at 3232 meters—serving as key ecological and hydrological zones. Fertile volcanic soils, including Nitisols and Vertisols, support vegetation but are erosion-prone without proper cover.

Sidama lies within two major Ethiopian **river** basins: the Rift Valley Lakes Basin and the Genale Basin (see section 5.1). The Gidabo River, which flows into Lake Abaya, has been harnessed for irrigation through the Gidabo Dam, enhancing agricultural productivity and fish production[10].

The region's **lakes**, notably Lake Hawassa and parts of Lake Abaya, are ecological and economic assets. They host diverse aquatic life, including fish, crocodiles, hippopotamuses, and birds, and attract tourists while supporting local livelihoods.

Sidama's natural attractions extend to its remarkable waterfalls, distributed especially in the southern area of the region, and hot springs due to the region's geothermal activity (see section 5.1).

Geomorphology and hydrography

Legend

Elevation (m AOD)

3.500
1.000

Altimetric point

Dam

Regional boundary

City

Town

Shashamane
Cheleleka wetland
Hawassa
Tabor (1821 m)
Lake Hawassa
Alamura (2019 m)
Dore
Kela
Chuko
Wondo Genet
Charake River
Kercheche
Bitana
Dimtu
Tula
Manicho
Yirba
Lako
Gorche
Badeessa
Darara
Badeessa River
Bilate River
GREAT RIFT VALLEY
Gidabo
Aposito
Yirgalem
Bokaso
Garamba (3232 m)
Hafursa (2760 m)
Yaye
Hantate
Melo Mena (2980 m)
Logita River
Agena (2580 m)
(3058 m)
Aleta Wondo
Chuko
Bursa
Teticha
Bona
Calalaa River
Chire
Daye
Nancebo
(1403 m)
Lake Abaya
Gidabo
Teferi-kela
Hageresélam
Dara Mechisho (1605 m)
Kewado
Cenale River
Borrora River
Ganale River
Chabe
Majo
Gidabo dam
Dilla
Fulanto (1970 m)
Girja

N

0 10 20 km

Source: OpenStreetMap
National Aeronautics and Space Admin.

3.2 Land cover

The Sidama Region exhibits a complex and varied land cover shaped by its topography, climate, and human activities. Plantation forest dominate the landscape, covering 64% of the region, 432,912 ha of its territory. These systems incorporate agroforestry practices, including coffee, ensete (false banana tree), fruit trees, woodlots, boundary plantings, tuber crops, and home gardens. This integration highlights the agricultural heritage and adaptability of the region's farmers. Dedicated croplands account for an additional 10%, underscoring agriculture's central role in the local economy.

Natural vegetation, such as bush and shrubland, comprises 2.70% of the land, while natural forests account for 3.76%, 25,427 ha. These ecosystems are crucial for biodiversity conservation and the provision of ecosystem services. Grazing lands, making up 2.13% of the region, support livestock, a vital component of mixed farming systems. Urban areas constitute 2.74% of the land, while rural settlements cover 8.43%, reflecting a predominantly rural population. Degraded lands, primarily due to deforestation and overgrazing, make up 2.89%, signalling environmental challenges. Water bodies and wetlands collectively account for 2.62%. The remaining land is used for quarrying, grasslands, and other miscellaneous purposes[11].

Land cover

Legend

- Bush & Shrub
- Crop land
- Degraded land
- Grass land
- Grazing land
- Natural forest
- Plantation forest
- Quarry site
- Urban settlement
- Rural settlement
- Water bodies
- Wetland

- Regional boundary
- Main paved road
- Unpaved road
- City
- Town

N

0 10 20 km

Source: Environmental Protection Authority (2024)

3.3 Administrative boundaries

Ethiopia's administrative structure[12] is hierarchical, comprising regions (kililoch), zones, woredas (districts), and kebeles (wards). Regions are the highest administrative units, often based on ethno-linguistic lines, and possess legislative and executive powers. Zones serve as intermediary units, coordinating activities between regions and woredas.

The **regional government** is tasked with implementing economic and social development policies, strategies, and plans at the regional level; this includes overseeing sectors such as education, health, agriculture, tourism and infrastructure within their jurisdictions. Regional governments also have the power to establish and administer their own police forces, maintain public order, and ensure the enforcement of both federal and regional laws. Authorities formulate tourism policies, strategies and development plans that align with national objectives, promoting tourism attractions, investment facilitation, and infrastructure development to enhance accessibility and visitor experience. Additionally, regional governments coordinate with federal bodies to ensure the preservation of cultural and natural heritage sites.

Woredas serve as the primary administrative units within regions. They are responsible for localized governance and service delivery, including setting certain tax rates and collecting local taxes, such as land use taxes, agricultural income taxes, sales taxes and user fees. Woredas are also tasked with preparing and approving annual development plans and budgets, overseeing their implementation to promote local development. Additionally, they play a crucial role in implementing regional tourism policies at the local level and facilitating community involvement in tourism initiatives, ensuring that local populations benefit from tourism-related activities; they also oversee the provision of essential services to support tourism development.

Kebeles are the smallest administrative units, operating to ensure community engagement and service delivery. Each kebele comprises an elected council, an executive committee (cabinet), a social court, and development and security staff, facilitating local governance and community participation. They are accountable to their respective woreda councils and are responsible for providing basic education, primary healthcare, agricultural support, water services, and maintenance of rural roads, serving as the primary contact point for citizens. They are involved in the collection of local taxes and the registration of houses, residents, births, deaths and marriages. Kebeles are crucial for tourism development: they engage local communities in preserving and promoting cultural and natural assets. They facilitate community participation in tourism initiatives, such as guiding services, handcraft production, and homestay programmes, directly involving residents in the tourism value chain. Their proximity to the community enables them to address challenges and adapt initiatives to local contexts.

The decentralization of powers to woredas and kebeles is designed to promote empowerment, enhance democratic governance, and improve service delivery. The effective collaboration among these administrative levels is essential for sustainable tourism development, ensuring that policies are appropriately tailored and implemented, and that benefits are equitably distributed across communities. However, challenges such as limited financial autonomy, capacity constraints, and overlapping responsibilities with regional authorities can impede the effective functioning of these local government units. Addressing these challenges is essential to realise the full potential of decentralised governance in Ethiopia.

In Sidama, larger woredas such as Loka Abaya are found in the western part of the region, characterized by relatively low population densities. Smaller woredas like Hawassa Zuriya, Shebedino, and Dale, are found in the central part of the region, around the north-south axis Hawassa-Dilla; these have higher population densities, supported by fertile land and better access to infrastructure. The presence of Hawassa city further contributes to the concentration of population and economic activities in this area. To the east, woredas are characterized by mountainous terrains; population distribution here is uneven, with settlements often located in valleys and plateaus where agriculture is viable. The challenging topography and limited accessibility result in a patchy pattern of urbanization, with smaller towns and villages dispersed throughout the highlands.

Durame
CENTRAL ETHIOPIA REGIONAL STATE
Bode Ameda
Shone
Shashamane
Qoree
Kefole
Dendo
Hawassa Zuriya
Hawassa
Hawassa
Wondo Genet
Wondo Genet
Ashoka Velag
Wabe
Edo
Edo
Worqicha
Dore
Bilate Zuriya
Bitana
Galcha
Kercheche
Dimtu
Balela
Yirba
Lida
Manicho
Malga
Hawela
Boricha
OROMIA
Badeessa
Anka Oruwa
Lako
Gorche
Darara
Shabadino
Gorche
SOUTH ETHIOPIA REGIONAL STATE
Darara
Yirgalem
Bokaso
Wonsho
Dale
Kokosa
Yaye
Hantate
Arbegona
Shafamo
Burra
Hafte Berene
Loka Abaya
Aleta Wondo
Burra
Shafamo
Chuko
Aleta Wondo
Bursa
Bursa
Werka
Alata Chuko
Teticha
Teticha
Bona Zuriya
Bona
Bansa
Daye
Chire
Teferi-kela
Daela
Daela
Chire
Hula
Dara Otilcho
Hagereselam
Kewado
Chirone
Chirone
Dara
Chabe
Chabe Gambeltu
Majo
Bore
Arroresa
OROMIA
SOUTH ETHIOPIA REGIONAL STATE
OROMIA
Girja
Hokko
Yiriga Cheffe

Administrative boundaries

Legend

- Region
- Woreda
- Region Capital
- Woreda Capital
- Water body
- Main paved road
- Unpaved road
- City
- Town

N

0 10 20 km

Source: Sidama Culture Tourism Sport Bureau

3.4 Human settlement

The human settlements in Sidama Region reflect a complex interplay of historical migrations, environmental factors, and socio-economic developments. Nowadays, the region exhibits a diverse array of human settlements, from bustling urban centres to traditional rural villages. Understanding the historical, environmental, and socio-economic factors that have shaped these settlements is crucial for effective spatial and tourism planning.

The Sidama people are among the earliest settlers in present-day Ethiopia, with historical accounts placing them in the northern highlands before migrating southward (see also section 5.4). This migration led to the establishment of communities around notable geographical features such as Lake Hawassa. Over time, these settlements evolved, influenced by interactions with neighbouring groups and the region's environmental conditions.

Historically, the area surrounding Lake Hawassa was heavily affected by malaria, which hindered human settlement. The prevalence of Anopheles mosquitoes, the primary vectors of malaria, made these regions less suitable for habitation, discouraging permanent settlements and agricultural activities. The mid-20th century marked a turning point in malaria control efforts globally and in Ethiopia. The introduction of pesticides, such as DDT, and the implementation of widespread indoor residual spraying campaigns significantly reduced mosquito populations. These measures decreased malaria transmission rates, rendering previously inhospitable areas more viable for human settlement.

Capitalising on improved malaria control, the Ethiopian government, under Emperor Haile Selassie, initiated the development of new towns to promote regional development. **In 1958, a seasonal palace was built along Lake Hawassa**, intensifying interest in the area. By 1960, the office of the vice district governorate moved from Hawella Tulla to Hawassa, and **in 1962, a municipality was founded**. The political centre officially shifted to Hawassa in 1968, designating it as the capital of the Sidama province.

The region still exhibits a predominantly rural population, with urban centres playing key roles in administration and commerce. As of the 2007 census, approximately 5.51% of the population resided in urban areas, while the remaining 94.49% lived in rural settings. Recent estimates indicate an increase in urbanisation, particularly in and around Hawassa City. This growth is driven by factors such as rural-to-urban migration, economic opportunities, and infrastructural development. However, the rapid expansion poses challenges, including strain on urban infrastructure, environmental degradation, and socio-economic disparities between urban and rural areas.

Sidama's settlement patterns encompass a spectrum from major cities to small villages.

The **primary urban centre** in Sidama is Hawassa, serving as the regional capital and a significant economic hub. The urban morphology of the city, established on the shore of Lake Hawassa, is characterized by a regular orthogonal street pattern and by a strong north-south axe that bisects the whole settlement. The city hosts diverse land uses, including commercial zones, residential neighbourhoods, and public spaces, contributing to its role as a focal point for regional trade, governance, and services.

Towns such as Yirgalem, Aleta Wondo, and Wondo Genet function as secondary urban nodes. These towns typically exhibit linear development patterns along major transportation routes, enhancing connectivity with rural hinterlands. The spatial organization often includes central marketplaces surrounded by mixed-use developments, with residential areas extending outward. This configuration supports local commerce and serves as a conduit for the exchange of goods and services between urban and rural areas.

Villages are predominantly agrarian settlements characterized by dispersed homesteads interspersed with farmland. The spatial arrangement reflects traditional land tenure systems and agricultural practices, with communal areas designated for social gatherings and cultural activities. Infrastructure development in these villages is often limited, influencing settlement density and patterns. The organic layout of villages contrasts with the more structured urban centres.

Human settlement

Legend

- Built-up area
- Water body
- Main paved road
- Unpaved road
- Regional boundary

N

0 10 20 km

Source:
OpenStreetMap
Office for the Coordination of Humanitarian Affairs

3.5 Population distribution and density

The relationship between population density and tourism is multifaceted, influencing both the development of tourist destinations and the experiences of visitors. High population density areas, such as urban centres, often attract tourists due to their rich cultural heritage, historical landmarks, and diverse amenities. However, an influx of tourists into already densely populated regions can exacerbate challenges like overcrowding, strain on infrastructure, and environmental degradation. Conversely, regions with low population density may offer unique attractions such as natural landscapes and tranquil environments, appealing to tourists seeking less crowded destinations. However, these areas might face limitations in infrastructure and services necessary to support increased tourist activity.

Population data for Sidama Region are primarily sourced from the Ethiopian Central Statistical Agency, which provides projections and census data. Additional information is available from international databases such as City Population and various academic studies. These sources offer insights into demographic trends, urban-rural distributions, and ethnic compositions within the region. It is important to recognize that these figures are approximations. Factors such as differences in sources and rapid population changes can affect the precision of these statistics. Nonetheless, they remain instrumental in understanding the settlement framework and guiding development planning.

The **Sidama people constitute the major ethnic group in the region**, accounting for approximately 93.01% of the population, according to the 2007 census[13]. Other ethnic groups include the Oromo (2.53%) and Amhara (1.91%). The Sidama people predominantly speak Sidaamu Afoo and have a rich cultural heritage that significantly influences the region's identity.

The Sidama Region is one of the most densely populated regions of the country of which in average 674 persons are living in a square kilometre[14].It has experienced significant population growth over recent decades. In 1994, the population was approximately 2 million, which increased to nearly 3 million by the 2007 census. Current estimates place the population at over 5 million as of July 2023, indicating a substantial growth rate. This rapid increase presents both challenges and opportunities in areas such as infrastructure development, service provision, and sustainable resource management.

As shown by the map, the region exhibits a varied population distribution influenced by topography, climate, and economic activities. Based on the population density, three major areas can be identified as follows.

Central spine. The central part of Sidama, encompassing urban centres such as Hawassa (population: 555,480) and towns like Yirgalem and Aleta Wondo (population: 276,385), forms a densely populated corridor. This area benefits from fertile land and favourable climatic conditions, supporting intensive agriculture, particularly coffee cultivation. The presence of major transportation routes and administrative functions further attracts population concentration.

Western lowlands. In contrast, the western part of Sidama, delineated by the Gidabo River, is sparsely populated. Factors contributing to this low population density include less fertile soils, limited infrastructure, and historical prevalence of diseases such as malaria, which have deterred extensive human settlement.

Eastern mountainous region. The eastern highlands of Sidama feature a patchy settlement pattern. The rugged terrain and variable climate pose challenges to large-scale agriculture and infrastructure development, resulting in dispersed rural communities. However, certain highland areas support ensete (false banana) cultivation, sustaining local populations. Additionally, towns like Wondo Genet (population: 234,490), known for its hot springs and natural beauty, contribute to localized urbanization.

Population distribution and density

Legend

Population density (ab/Ha)

- 0 - 5
- 5 - 10
- 10 - 50
- 50 - 175

- Regional boundary
- Water body
- Main river
- Main road
- City
- Town

N

0 10 20 km

Source: www.kontur.io

Bode Ameda
Shashamane
Qoree
Shone
Dendo
Edo
Worqicha
Bitana
Galcha
Kercheche
Dimtu
Badeessa
Anka Oruwa
Kefole
Ashoka Velag
Wabe
Edo
Hawassa
Dore
Kela
Chuko
Wondo Genet
Tula
Manicho
Yirba
Lako
Gorche
Darara
Aposito
Yirgalem
Bokaso
Kokosa
Yaye
Hantate
Hafte Bergene
Chuko
Aleta Wondo
Bursa
Teticha
Bona
Daye
Werka
Chire
Nancebo
Teferi-kela
Hagereselam
Kewado
Chabe
Majo
Dilla
Bore
Girja
Yiriga Cheffe
Solemo
Bocco



4. Tourism infrastructure and facilities

4.1 Access to Sidama

Effective access is key to unlocking Sidama's potential, supporting visitor inflows, and enabling sustainable development. This section examines current connectivity to the region, identifies challenges, and highlights ongoing improvements to enhance accessibility.

Hawassa Airport (IATA: AWA) is the main air gateway to the region, strategically located on the western shore of Lake Hawassa, approximately 10 km from Hawassa city centre. The airport features a single asphalt runway with a length of 3,000 metres, accommodating medium-sized aircraft for domestic flights. The terminal has a capacity to handle 150 passengers per hour at peak times, though facilities remain basic, with limited retail and service options. Further upgrades to expand terminal capacity and improve amenities are under consideration to enhance the passenger experience and align with growing tourism demands. Managed by Ethiopian Airlines, the airport offers scheduled flights to and from Addis Ababa[15], with a flight duration of one hour.

From Addis Ababa Bole International Airport, travellers gain access to Ethiopian Airlines' extensive international and domestic network. Ethiopian Airlines operates flights to over 155 destinations globally, spanning Africa, Europe, Asia, the Middle East, and the Americas, including 22 domestic locations. This connectivity positions Hawassa Airport as a vital link, facilitating inbound tourism to the Sidama region and enabling residents and businesses to engage with global markets and destinations. The connection between Hawassa Airport and Addis Ababa thus not only supports regional tourism, but also integrates Sidama into the broader national and international economic framework. Enhanced air connectivity bolsters the region's attractiveness as a tourism destination while providing a convenient travel option for both leisure and business travellers.

Sidama benefits from an extensive **road network** that supports both regional and inter-regional connectivity. The main access route is the fully paved highway connecting Addis Ababa to Hawassa, which is part of the African Trans International Highway, connecting Cairo to Cape Town. The road distance from Addis Ababa to Hawassa is approximately 275 km via the Addis Ababa–Modjo–Hawassa Highway (part of the A7 and Meki-Hawassa expressway) with a travel time of approximately 4.5 hours. It is a well-maintained route that enhances travel between the capital and the Sidama region. Along this corridor, travellers can find several roadside amenities, including fuel stations. Food and beverage options are available at various points, with establishments offering traditional Ethiopian cuisine and refreshments. However, the availability of rest areas and dedicated service stations is limited, and signage varies in quality, with some sections lacking clear directional indicators. These factors can affect the overall convenience and safety of the journey, particularly for tourists unfamiliar with the region.

The Sidama region connects further south to the Oromia region through the A8 highway, which extends beyond Dilla, a key town near the Sidama-Oromia border. The Sidama region is a pivotal segment of Ethiopia's renowned "**Southern Route**", connecting travellers to a variety of significant tourist destinations, such as:

- Lake Ziway: situated approximately 160 km north of Hawassa along the Addis Ababa–Hawassa Road, Lake Ziway is the largest of Ethiopia's Rift Valley lakes. It is celebrated for its rich birdlife and historical monasteries;
- Abijatta-Shalla National Park: located about 200 km north of Hawassa, this park encompasses Lakes Abijatta and Shalla. It is renowned for its flamingo populations and diverse aquatic ecosystems. The park is accessible via the main highway connecting Hawassa to Addis Ababa;
- Bale Mountains National Park: positioned to the east of Sidama, the park is approximately 300 km from Hawassa. It is accessible via the road passing through Shashamane and Dodola. The park is distinguished by its alpine landscapes and endemic species, including the Ethiopian wolf;
- Omo Valley: situated southwest of Sidama, the Omo Valley is approximately 450 km from Hawassa. Travellers can reach it by taking the road through Wolayata Sodo and Arba Minch. The valley is renowned for its rich cultural diversity, being home to multiple indigenous tribes; and
- Nechisar National Park: located near Arba Minch, about 225 km south-west of Hawassa, the park is accessible via the road passing through Wolayata Sodo.

Figure 8 (Previous pages): On the road in Loke Abaya National Park

Access to Sidama

Amhara Region
Afar Region
Nekemte
Ambo
Addis Ababa
Addis Ababa
Adama
Dambidollo
Gambela
Abobo
Lake Ziway
Asella
A7
Central Ethiopia Regional State
Jimma
Abijatta-Shalla National Park
Gambela Region
Shashamane
Robe
Mizan-Aman
Wolayta Sodo
Hawassa
Dodola
South West Ethiopia Peoples' Region
Omo
Bale Mountains National Park
Dilla
Oromia
South Ethiopia Regional State
Omo National Park
Nech Isar National Park
Arba Minch
Jinka
D82
Negele
A8
Somali Region
Mogadishu
1150 Km
K E N Y A
Nairobi
1270 Km

Legend

- Main international road links
- Important tourist destination
- Main tourism routes
- A7 Road Classification
- Main road
- International airport
- Domestic airport
- Flight connection
- Border post
- Capital
- Main city
- Main river
- National boundary
- Regional boundary
- Sidama Region
- Omo Valley

N

0 30 60 km

Source: OpenStreetMap
Ethiopian Roads Administration

4.2 Mobility within Sidama

Road transport is the most widely used mode of travel for both domestic and international tourists accessing the region. The region has approximately **1,092 km of road network**[16], including 879 km of all-weather roads and 213 km of dry-weather roads. Road density stands at 161 km per 1,000 square km, significantly higher than the Ethiopian national average of approximately 123 km per 1,000 square km. Despite this, disparities persist, particularly in rural and mountainous areas where dry-weather roads are more prevalent and prone to seasonal inaccessibility.

The regional road network varies significantly across its western, central, and eastern areas, influenced by factors such as population density, settlement patterns, and geomorphology.

The central region is more densely populated, with settlements organized along the A8 expressway that connects Hawassa, at the northern regional border, to Dilla, at the southern regional border, on a distance of approximately 85 km.

Beyond the main north-south corridor, an east-west axis connects the A8 highway in an eastbound direction through Aleta Wondo, Daye to the easternmost limit of the region at Chire, on an approximate distance of 140 km. Characterized by mountainous terrain, the eastern region's roads have a winding layout to navigate the challenging landscape. This topography complicates road construction and maintenance, affecting travel efficiency and safety.

It should be mentioned that the Daye–Chire–Nansebo Road Project[17] is a significant infrastructure initiative undertaken by the Ethiopian Roads Administration to enhance connectivity between the Sidama and Oromia regions. The project involves the construction of approximately 73.41 km of road.

Other secondary roads provide connections to key destinations within Sidama, such as Yirgalem, Wondo Genet, and the rural highlands, though their conditions vary, with gravel surfaces and limited maintenance in remote areas.

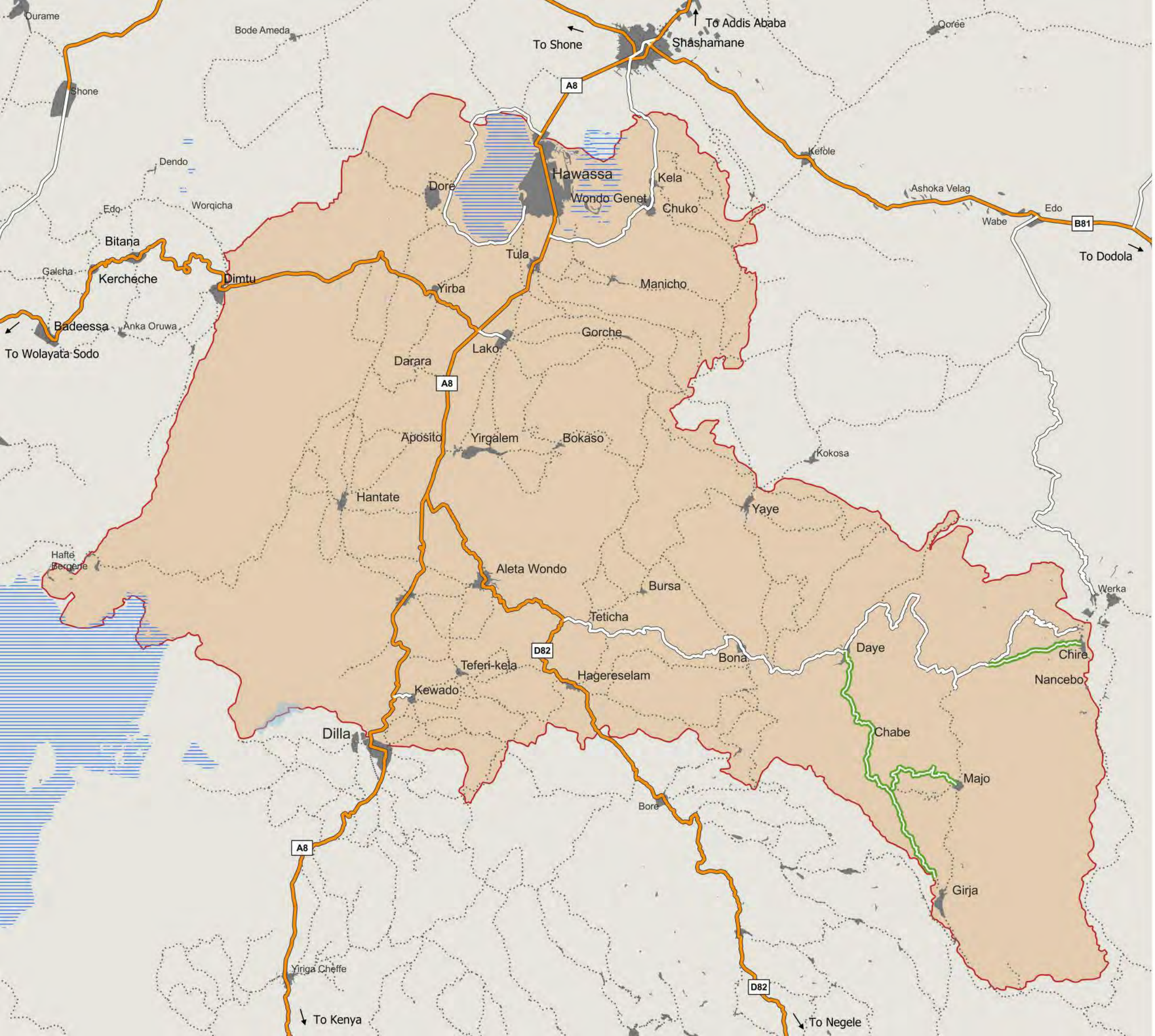
Dry-weather roads become particularly problematic during the rainy season[18]; they are primarily located in rural and less accessible areas, often connecting smaller towns and villages. These roads are typically unpaved and become challenging to traverse during the rainy seasons due to mud and waterlogging.

Road traffic accidents are a significant concern, with studies[19] highlighting alarming trends. Between July 2020 and June 2021, 291 accidents were recorded in the region, with nearly half resulting in fatalities. These incidents disproportionately involved younger drivers aged 17–30, who accounted for 66.7% of the accidents.

Public transport mainly relies on minibuses, taxis and *bajaj*, serving both urban centres and smaller towns. In addition, Lake Hawassa offers limited water-based access points, primarily for fishing and leisure. The lack of fully developed docking facilities restricts broader tourism use, presenting an opportunity for investment in water-based transport infrastructure.

In conclusion, the Sidama region faces several challenges regarding access and connectivity, which affect both the local population and tourism activities. While the main roads are well-maintained, secondary and tertiary roads, particularly in rural and mountainous areas, remain unpaved and susceptible to seasonal disruptions. Essential roadside amenities, such as fuel stations, rest areas, and clear signage, are limited outside major routes, reducing the comfort and safety of travel for tourists and locals alike.

Mobility within Sidama



Legend

- Major Paved Roads
- Minor Paved Roads
- Unpaved Roads
- Road sections under improvement
- A7 Road classification
- Water body
- Built-up area
- Regional boundary

N

0 10 20 km

Source: Ethiopian Roads Administration
Open Street Map

4.3 Primary tourism facilities

Primary tourism facilities[20] encompass the essential services and infrastructure that underpin the tourism industry, such as hotels and lodges, food and beverage establishments, and transport-related services. Hotels are categorised from 1 to 5 stars. In recent developments, the MoT announced plans to retire the existing hotel star ratings by September 2024, in accordance with Regulation No. 173/2010, which mandates hotels to undergo re-classification every three years. The Ministry has initiated preparations for the reassessment process[21].

Hawassa houses 34 accommodation facilities, including 11 star-rated establishments, contributing a capacity of over 1,755 beds. These facilities not only cater to leisure tourists but also address the demands of business travellers through conference and meeting facilities. Noteworthy examples in Hawassa include Haile Resort[22] (4 stars, 112 rooms, 144 beds), Lewi Resort[23] (4 stars, 64 rooms, 64 beds), and the recently built South Star International Hotel[24] (4 stars, 114 rooms, 144 beds), which collectively set benchmarks for hospitality within the region.

Garamba Mountain represents an evolving hub for eco-tourism, bolstered by the ongoing construction of Garamba Lodge. Financed by the SCTSB, the lodge is currently under development. The local community is actively engaged through enterprises focusing on local food preparation, handcraft production, guiding services, and transportation.

Yirgalem, located approximately 45 km south of Hawassa, hosts accommodation that blend cultural immersion with agricultural tourism. Aregash Lodge[25] stands out as an eco-friendly facility, offering traditional Sidama-style tukul huts set amidst coffee plantations and bamboo forests. Complemented by Furra Hotel[26], these accommodations fortify Yirgalem's position as a hub for agro-tourism.

Wondo Genet is renowned for its geothermal hot springs. Wondo Genet Resort Hotel[27] provides a combination of basic lodging and therapeutic hot spring access, though infrastructural upgrades are needed to elevate its appeal to international tourists. While facilities in Wondo Genet are functional, there is significant potential for improvement in terms of quality and capacity to better meet the needs of international tourists.

Aleta Wondo and **Daye** host accommodation facilities primarily consisting of small hotels and guesthouses that provide essential services for visitors exploring rural Sidama. Aleta Wondo, known for its coffee tourism, features establishments like the Furra Development Institution, which offers 97 beds and promotes agro-tourism initiatives.

In Sidama, traditional dishes, such as ensete-based preparations and spiced meat stews, are complemented by the region's celebrated coffee. Many restaurants, particularly in Hawassa and towns like Yirgalem, feature culturally resonant designs that incorporate traditional handcrafts and Sidama-style decor. For example, the traditional restaurant at Haile Resort in Hawassa offers a curated menu of local specialities in a setting designed to reflect the cultural heritage of the region. Similarly, Aregash Lodge in Yirgalem serves locally sourced dishes in an eco-friendly accommodation.

Local tour operators facilitate access to these diverse attractions in Sidama. It is a competitive market place with just 1 licensed local tour operator based in Sidama out of around 600 registered tour operators nationally (550 local, 30 joint venture and 20 franchises), many based in Addis Ababa with regional offices/destination management companies.[28]They provide guides and traditional-style itineraries where Sidama is incorporated into wider regional Southern Ethiopia Routes and thematic birding, coffee, hiking and cultural itineraries. However, many local tour operators remain early on in their journey towards specialisation in experience design and sustainability required to meet international trends.

Primary tourism facilities

HAWASSA

Bode Ameda
Shashamane
Shone
Dendo
Hawassa
Dore
Kela
Wondo Genet
Chuko
Edo
Worqicha
Bitana
Galcha
Kercheche
Dimtu
Tula
Manicho
Yirba
Badeessa
Anka Oruwa
Lako
Gorche
Darara
Aposito
Yirgalem
Bokaso
Kokosa
Hantate
Yaye
Aleta Wondo
Chuko
Bursa
Teticha
Werka
Bona
Daye
Chire
Teferi-kela
Hagereselam
Nancebo
Kewado
Dilla
Chabe
Majo
Bore
Girja
Yiriga Cheffe

Legend

- Hotel
- Restaurant
- Lodge
- Main paved road
- Unpaved road
- Built-up area
- Water body
- Region boundary

N

0 10 20 km

Source: OpenStreetMap

4.4 Secondary tourism facilities

Secondary tourism facilities complement primary services and enrich the overall visitor experience by offering additional amenities that enhance leisure and business travel, such as shopping opportunities, recreational assets, entertainment venues, visitor information services, conference centres, and cultural villages.

Managed by the SCTSB, several **information centres** operate across the region, with the main facility located in Hawassa. This centre provides brochures, maps, and guidance, but also houses the Sidama Cultural Hall , a museum showcasing artefacts and exhibits of the region's heritage. The facility's 1,500-seat auditorium remains underutilised, presenting a significant opportunity for enhanced programming and promotional activities.

Digital platforms are vital for modern tourism, providing accessible and up-to-date information for planning and exploration. Websites such as Visit Sidama[29] play a pivotal role by offering detailed information about attractions, accommodations, and activities as well as a number of tourism routes. However, the lack of downloadable maps and online booking facilities on these platforms is a notable limitation.

Conference facilities are concentrated in Hawassa. The Haile Resort provides state-of-the-art meeting spaces with advanced audiovisual facilities, catering to both local and international clientele. Similarly, South Star International Hotel and Lewi resort offer facilities for business gatherings. Additionally, the 1,500-seat auditorium at the main visitor centre represents an underutilised asset. The new Sheraton Four Points under development will also provide conference facilities.

Community-based facilities in Sidama highlight the intersection of cultural preservation and socio-economic development. The SDA[30] promotes initiatives that empower local communities through organised services such as guiding, local transportation, and handcraft production.

Hawassa Fish Market, located on the shores of Lake Hawassa, is a vibrant and unique attraction that blends local commerce with cultural and ecological experiences. Owned and managed by the SDA, the market is a hub for fish processing and sales, supported by a cooperative of 200 fishing boats. Under a large canopy, visitors can witness fish being prepared in various ways, including cooked, fried, or eaten raw, providing an authentic culinary experience.

The market features 50 micro food outlets, a beer outlet, and a guest house for visitors seeking to extend their stay. It is also known for its natural setting, where marabou storks and other bird species thrive by feeding on the leftovers from fish processing, creating an opportunity for birdwatching enthusiasts. Despite its immense potential, the facility requires significant improvements in infrastructure and cleanliness.

Voluntourism with Common River[31]: located near Aleta Wondo, this program offers an immersive blend of volunteering and tourism. Accessible via paved roads from Hawassa, Common River provides a base for tourists to engage in literacy and educational initiatives within local communities. The site includes essential facilities such as meeting areas for volunteers and guided access to surrounding natural and cultural landmarks. Participants can explore Sidama's scenic landscapes, including bamboo plantations, coffee farms, and hiking trails, while contributing to meaningful social projects that enhance community welfare.

Secondary tourism facilities

HAWASSA

Legend

- Shopping
- Recreation
- Conference
- Visitor information centre
- Main paved road
- Unpaved road
- Built-up area
- Water body
- Region boundary

N

0 10 20 km

Source: OpenStreetMap

Kuyera
Bode Ameda
Shashamane
Shone
Dendo
Edo
Worqicha
Bitana
Galcha
Kercheche
Dimtu
Badeessa
Anka Oruwa
Hawassa
Dore
Kela
Wondo Genet
Chuko
Tula
Manicho
Yirba
Lako
Gorche
Darara
Aposito
Yirgalem
Bokaso
Kokosa
Hantate
Yaye
Aleta Wondo
Chuko
Bursa
Teticha
Bona
Daye
Werka
Chire
Nancebo
Teferi-kela
Hagereselam
Kewado
Dilla
Chabe
Majo
Bore
Girja
Yiriga Cheffe

Shopping facilities in Sidama Region provide visitors with opportunities to purchase locally made products, showcasing the region's rich cultural heritage.

The Hawassa Central Market, located in the heart of the city, is a bustling hub of activity that offers a wide range of food produce and crafted goods, including traditional Sidama textiles, intricately woven baskets, and handmade pottery. Along the shores of Lake Hawassa, there is a pleasant promenade flanked by vendors' stalls that sell local handcrafts as well as other items. Visitors can stroll along the water's edge and purchase merchandise ranging from handmade Sidama textiles to jewellery and pottery. The area provides a relaxed shopping experience enhanced by the scenic beauty of the lake.

Smaller towns like Yirgalem and Aleta Wondo also feature **handcraft** centres where visitors can engage directly with artisans. Aposito handcraft Centre in Yirgalem is a dedicated space that highlights the region's artisanal traditions. The centre is easily accessible via paved roads from Hawassa, making it a convenient destination for tourists exploring the southern corridor. It specialises in traditional weaving and pottery, with on-site demonstrations that allow visitors to observe skilled artisans at work. The centre also provides a retail area where tourists can purchase unique souvenirs, supporting local craftsmanship and providing an authentic cultural experience.

Despite the availability of these facilities, a significant gap remains in the presentation and accessibility of handcraft markets and other local produce of interest to visitors. Enhanced marketing efforts and infrastructure improvements could help establish Sidama as a key destination for cultural shopping tourism.



Figure 9: Logita Lodge

Figure 10 (right page): Local handcraft at Aposito and Dila Afrara Handcrafts Villages; and Hawassa Fish Market









4.5 Tertiary tourism facilities

Tertiary tourism facilities underpin the region's capacity to provide a secure, accessible, and satisfying environment for visitors. These facilities encompass healthcare services, financial institutions, transportation support, security measures, and digital connectivity.

Healthcare infrastructure addresses the needs of both residents and tourists, with Hawassa serving as the hub of medical services. The city hosts key institutions, including:

- Hawassa University Comprehensive Specialized Hospital, operating as the principal referral facility for the region, is equipped with advanced diagnostic and therapeutic technology. It offers emergency services and comprehensive outpatient care, ensuring access to high-quality medical assistance for visitors and residents alike[32];
- Adare Hospital, strategically located in southern Hawassa, this general hospital provides holistic healthcare services, catering to both the local population and visiting tourists[33];
- Yanet Trauma and Surgery Specialized Center, situated in central Hawassa, addresses trauma and surgical cases, offering both emergency and elective procedures[34];
- Bushulo Mother and Child Speciality Center, positioned near the outskirts of Hawassa, focuses on maternal and paediatric health, aiming to improve outcomes for these vulnerable groups[35]; and
- Private clinics such as Millennium Medical Centre, located near Hawassa's central business woreda, and Zewditu Clinic, along the main road to Yirgalem, provide rapid and efficient care for minor ailments and travel-related conditions.[36]

Despite these resources, significant gaps remain in healthcare provision near major tourist attractions such as Wondo Genet and Garamba Mountain.

Banking and financial services form the backbone of a well-functioning tourism sector. In Hawassa, several banking institutions cater to the needs of domestic and international visitors.

The proliferation of mobile banking platforms, such as CBE Birr and Telebirr, has facilitated cashless transactions in urban areas. However, rural locations remain underserved, necessitating investments to enhance financial accessibility.

Tourist safety is an essential dimension of tourism. The measures implemented to ensure safety, include a specific Tourist Police, based in Hawassa, a dedicated unit that provides guidance and resolves issues specific to tourists. Services are mainly concentrated in Hawassa with fire stations equipped to handle urban emergencies, and ambulance services that remain concentrated in urban areas, with limited reach in rural and remote locations.

Mobile communication and internet access is a key expectation of travellers, and modern tourism is increasingly dependent on digital connectivity. In Sidama, Ethio Telecom dominates the telecommunications landscape, providing 3G and 4G coverage extending across Hawassa, Yirgalem, and Aleta Wondo, with varying reliability in rural areas. In November 2024, Ethio Telecom officially launched its 5G services in Hawassa[37].

Public Wi-Fi hotspots are available in selected urban locations, including hotels and cafes in Hawassa. Ethio Telecom operates service centres in major towns, offering SIM cards, top-ups, and device support. To support tourism growth, efforts must focus on extending network coverage to rural attractions and improving data speeds. Safaricom Ethiopia has significantly expanded its network coverage since commencing operations in October 2022. As of December 2024, the company has extended its services to various regions, including the Sidama Region.

Tertiary tourism facilities

HAWASSA

Kuyera
Bode Ameda
Shashamane
Shone
Dendo
Edo
Worqicha
Bitana
Galcha
Kercheche
Dimtu
Badeessa
Anka Oruwa
Hawassa
Dore
Kela
Wondo Genet
Chuko
Tula
Manicho
Yirba
Lako
Gorche
Darara
Aposito
Yirgalem
Bokaso
Kokosa
Hantate
Yaye
Aleta Wondo
Chuko
Bursa
Teticha
Werka
Chire
Bona
Daye
Teferi-kela
Hagereselam
Nancebo
Kewado
Dilla
Chabe
Majo
Bore
Girja
Yiriga Cheffe

Legend

- Hospital
- Police Station
- Bank
- Main paved road
- Unpaved road
- Built-up area
- Water body
- Region boundary

N

0 10 20 km

Source: OpenStreetMap

5. Inventory of natural, historical and cultural assets

Geology and landscape

Sidama Region's rich geotourism potential is shaped by its varied geological, geomorphological, and hydrological features, making it a prime destination for geological exploration and tourism. Located along the East African Rift System, the region boasts spectacular landscapes, including volcanic plateaus, calderas, and fault escarpments. Major features include Mount Garamba, Lake Abaya, Lake Hawassa, and prominent waterfalls such as Logita and Bo'nora. These assets provide opportunities for diverse activities, from scenic viewpoints to hiking routes across unique terrains. The first section of the inventory includes 37 sites and highlights these geological assets, encompassing mountains, lakes, waterfalls, river gorges, volcanic formations, hot springs, erosional landscapes, and strategic viewpoints, providing a comprehensive framework for sustainable geotourism development.

Wildlife and biodiversity

The region is recognised for its abundant ecological and biological diversity, contributing significantly to Ethiopia's overall biodiversity. Two rift valley lakes, Lake Abaya and Lake Hawassa, not only define the region's boundaries but also serve as critical habitats for migratory birds of global importance. The region features significant natural forests spanning approximately 62,000 hectares and plantation forests covering about 67,000 hectares, offering refuge to endemic and endangered flora and fauna. Key wildlife and biodiversity attractions include Loka Abaya National Park, Senkelle Swayne's Hartebeest Sanctuary, Wondo Genet Natural Reserved Forest, and Garamba Mountain Conservation Area. This inventory section includes 28 sites and examines biodiversity-rich sites such as national parks, sanctuaries, forests, wetlands, botanical and zoological gardens, alongside endemic and threatened species.

Tangible cultural and historical heritage

Sidama region is home to a diverse range of tangible cultural and historical heritage assets that reflect its rich history, architecture, and spiritual traditions. These include palaeontological sites, megalithic fields, and rock art that provide glimpses into the region's ancient past. Archaeological sites, such as the remains of settlements and monuments, highlight the historical significance of Sidama in Ethiopian history. Architectural heritage encompasses traditional vernacular structures, climate-adaptive designs, and historical religious buildings, including churches, mosques, and sacred sites. This inventory section includes 19 sites and focuses on their historical, architectural, and cultural importance, ranging from ancient forts and palaces to old towns and villages that embody the Sidama people's enduring legacy.

Intangible cultural heritage

The Sidama people have a rich intangible cultural heritage rooted in centuries of history and tradition. Their lineage traces back to two ancestral groups, Bushee and Maldea, which are represented by distinct clans, yet share unique cultural practices and the Moote political tradition. Over time, the Sidama have cultivated a wealth of intangible cultural assets, including their indigenous language, traditional music, dance, ceremonies, and coffee rituals. The region is also known for its cultural festivals, such as the Fiche-Chambalaalla, and practices tied to farming, craft-making, and oral storytelling. This inventory section examines 16 intangible elements, including social organisation, religious practices, traditional knowledge in astronomy, food and drink culture, and historical narratives, offering a comprehensive understanding of Sidama's cultural identity.

Figure 11 (previous pages): Agena Mountain Landscape

Natural, historical and cultural assets

HAWASSA

Hawassa

Legend

- Wildlife and biodiversity
- Tangible cultural and historical heritage
- Intangible heritage
- Geology and landscape
- Accomodation

- Water body
- Main paved road
- Unpaved road
- Built-up area
- Regional boundary

Bode
Ameda
Shashamane
Shone
Dendo
Worqicha
Dore
Kela
Chuko
Wondo
Genet
Bitena
Galcha
Kercheche
Dimtu
Balela
Yirba
Tula
Lida
Manicho
Anka
Oruwa
Bedesa
Lako
Gorche
Darara
Aposito
Bokaso
Woncho
Yirgalem
Kokosa
Arbe
Gona
Yaye
Hantate
Burra
Hafte
Bergene
Aleta
Wondo
Chuko
Bursa
Werka
Teticha
Bona
Daye
Chire
Daela
Nancebo
Teferi-kela
Hagereselam
Kewado
Chirone
Chabe
Dilla
Majo
Bore
Girja

N

0 10 20 km

Source: OpenStreetMap
Expert analyses and research

5.1 Geology and landscape

Sidama is located within a geologically complex zone, encompassing the **Main Ethiopian Rift** and the southeastern upland plateau. Its rock formations, comprising ancient Precambrian basement rocks and Cenozoic volcanic deposits, chronicle millions of years of Earth's geological evolution[38]. The region's topography is diverse, featuring rift floors, escarpments, highland plateaus, and deep gorges shaped by river activity.

The dissected plateaus are interspersed with rivers, ravines, and mountain ranges, serving as sources for numerous watercourses, including the Logita, Gambelto, Gidabo, Bo'nora, Galana, Koolla, Bogga, Worqa, Kado, Jigeessa, Ereerte and Malgaancho rivers. Additionally, the Genale, Hamile, and Darra rivers flow between Sidama and neighbouring regions, while the Bilate River links Sidama with Oromia and the Southern Regional States.

The region possesses significant **geotourism potential** due to its diverse geological, geomorphological, and hydrological features[39].

It offers a range of landscapes, from rift valley lakes and volcanic formations to river gorges and mountainous terrains. Sidama's unique geological formations create dramatic vistas, particularly along transitional escarpments descending towards the Rift Valley floor. Mount Garamba, the region's highest peak, exemplifies its **volcanic heritage**, while hot springs and fumaroles highlight ongoing geothermal activity. Fertile lands, enriched by volcanic soils, support coffee plantations and contribute to the region's lush scenery.

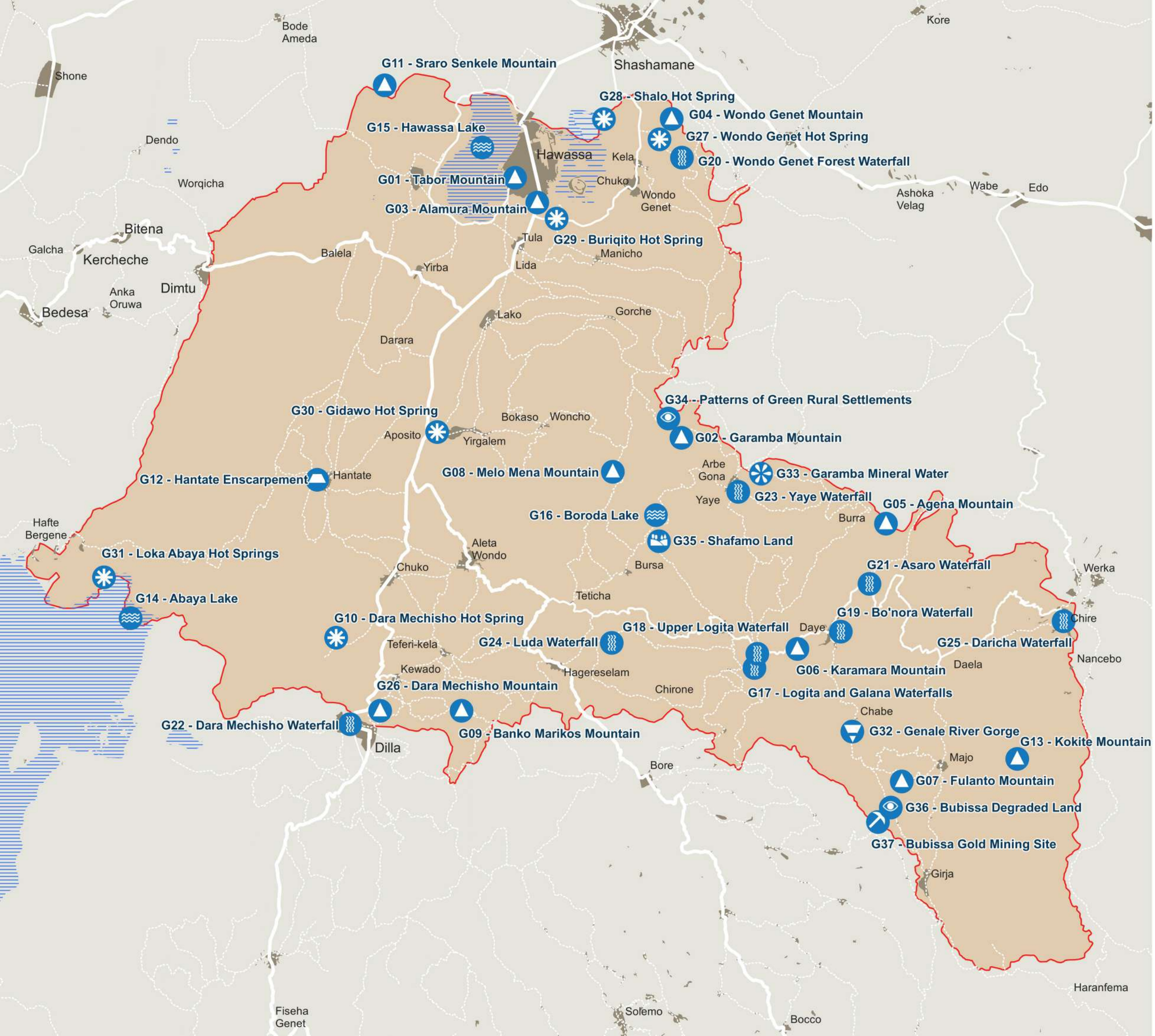
Water resources are integral to Sidama's ecological and tourism value. Notable lakes include **Lake Hawassa** and **Lake Abaya**, with Lake Hawassa serving as a hub for recreation, birdwatching, and cultural engagement. The lake, positioned within a closed sub-basin, receives inflow from the Daka River. Smaller water bodies, such as Boroda Lake in Shafamo Woreda, add to Sidama's hydrographic diversity.

Waterfalls and smaller river valleys contribute to the region's picturesque landscape. The Bo'nora Waterfall, the largest in the region, is located approximately 133 km southeast of Hawassa in Bona Zuriya Woreda. This site features an impressive cascade, the nearby Bo'nora Cave, and indigenous forests. Nearby, the Asaaro Waterfall, situated just 3 km from Bo'nora, enhances the area's scenic beauty. Another notable cascade, the Logita Waterfall, is found 119 km southeast of Hawassa in Bona Zuriya Woreda. In addition, Glana, Gidabo, Wonga, Ganguwa, Bebeko, and Kintire, add to the scenic appeal of Sidama.

Sidama is home to several **geothermal springs**, which are recognised for their therapeutic properties. Wondo Genet features developed facilities like an Olympic-sized pool, individual baths, and steam rooms for tourists and health treatments. The Chiqa thermal spring in Wondo Genet is notable for traditional health use. These springs are cultural and ecological assets with potential for sustainable tourism and energy development. Yirgalem, Loka Abaya, Dara, and Buriqito attract visitors seeking wellness tourism opportunities[40]. These geothermal features, set against verdant backdrops, contain mineral-rich waters believed to have healing properties. Additionally, mineral water sources scattered across the region provide naturally carbonated drinking water. These springs, a product of geothermal activity linked to the Main Ethiopian Rift, reflect the region's dynamic tectonic history[41].

Geological and hydrological features in Sidama offer opportunities for geotourism and scientific research. The region's natural hot springs, scenic escarpments, volcanic formations, and water bodies serve as key attractions that enhance its development potential.

Geology and landscape



Source: expert analyses and research

G01 - Tabor Mountain

Type

Mountain

Description

Tabor Mountain is a prominent landmark near Lake Hawassa, offering panoramic views of the city and surrounding areas. .It rises from a base elevation of approximately 1720 meters to a peak elevation of about 1821 meters asl. The moderately steep hiking trail to the summit provides an active outdoor experience for visitors. The mountain is rich in biodiversity, making it a favored destination for birdwatching and nature photography. The site is included in the SCTSB website as well as on the evendo.com website (Discover the Natural Splendor of Tabor Mountain) and it is regularly visited by domestic and international tourists.

Accessibility

The site is directly accessible from a secondary road.

Location

Hawassa City Administration.

G02 - Garamba Mountain

Type

Mountain

Description

Garamba Mountain is the highest peak of the region standing at 3232 meters asl. It rises from a base elevation of approximately 3000 meters to a peak elevation of about 3368 meters asl. It is located at 86 km from Hawaasa city and at about 250 km from Addis Ababa city respectively and serves as the source of several major rivers including Gidabo, Galana nad Genale river, as well as of several water springs. The mountain offers diverse flora and fauna, spectacular landscapes, and opportunities for trekking, hiking, and birdwatching. On clear days, visitors can see Tullu Dimtu, Ethiopia's second-highest peak, located in Bale Mountains National Park. The site is included in the SCTSB website and it is regularly visited by domestic and international tourists.

Accessibility

The site is accessible via an unsurfaced road in good condition, with additional access via an easy footpath.

Location

Arbegona Woreda, Central Sidama Zone.

G03 - Alamura Mountain

Type

Mountain

Description

Alamura Mountain is a breathtaking natural attraction offering panoramic views of Hawassa city and Lake Hawassa. It rises from a base elevation of approximately 1,740 meters to a peak elevation of about 2,019 meters asl. The mountain's trails provide an excellent opportunity for hiking, with scenic overlooks that appeal to nature lovers and adventure seekers. The rich biodiversity of the area adds to its ecological and tourism value. The site is not included in the SCTSB website, but it features in the evendo.com website (Discover the Majestic Alammura Mountain) and it is regularly visited by domestic and international tourists.

Accessibility

The site is directly accessible from a primary road.

Location

Hawassa City Administration.

G04 - Wondo Genet Mountain

Type

Mountain

Description

Wondo Genet Mountain offers an extraordinary blend of geological wonders, lush greenery and captivating landscapes. It rises from a base elevation of 1770 meters to a peak elevation of about 2584 meters asl. Renowned for its rugged terrain and breathtaking views, it is a hotspot for geotourism. Wondo Genet Mountain is also home to diverse ecosystems, supporting an array of flora and fauna. The area also offers excellent opportunities for hiking, birdwatching and cultural interactions with the Sidama people, who have a long-standing connection with the land. This site is not directly include on the SCTSB website, but it is part of the Wondo Genet Route, highlighting its birdlife, dense forests, waterfalls and hot springs. It remains one of the most frequently visited sites and a popular attraction for both domestic and international tourists.

Accessibility

The site is directly accessible via a secondary road.

Location

Wondo Genet Woreda, Northern Sidama Zone.

G05 - Agena Mountain

Type

Mountain

Description

Agena Mountain in Bura Woreda offers stunning landscapes and immense geotourism potential. It rises from a base elevation of approximately 2,650 meters to a peak elevation of about 2,960 meters asl. The mountain is an ideal location for camping, hiking, and adventure tourism, featuring dramatic cliffs, deep valleys, and expansive views of the surrounding environment. The site is currently not visited by tourists.

Accessibility

The site is accessible via an unsurfaced road in good condition, followed by an easy footpath.

Location

Burra Woreda, Eastern Sidama Zone.

G06 - Karamara Mountain

Type

Mountain

Description

The Karamara Mountain (also known as Bansa Amana Beto Mountain), located near Daye town in the Sidama Region of Ethiopia, is a prominent natural feature with significant tourist appeal.It rises from a base elevation of approximately 2,010 meters to a peak elevation of about 2,440 meters asl. It has the potential to become a geotourism hotspot due to its unique geological features, breathtaking landscapes and cultural significance. The mountain offers breathtaking views of the surrounding Sidama highlands, Genale Gorge and lush greenery. It is occasionally visited both from domesitc and international tourists.

Accessibility

The site is directly accessible from a primary road.

Location

Bensa Woreda, Eastern Sidama Zone.

G07 - Fulanto Mountain

Type

Mountain

Description

Fulanto Mountain is located in Hoko Woreda, Sidama Region, Ethiopia. It rises from a base elevation of approximately 1510 meters to a peak elevation of about 2010 meters asl. The mountain offers breathtaking views of the surrounding valleys, highlands, and lush greenery of the Sidama region. The area is ideal for trekking and adventure tourism, with trails that lead through picturesque valleys and forested landscapes. The site is frequently visited by members of the local and international scientific and educational communities for research purposes because of its unique geological nature.

Accessibility

The site is directly accessible from a secondary road. The access road is unsurfaced but in good condition.

Location

Hoko Woreda, Eastern Sidama Zone.

G08 - Melo Mena Mountain

Type

Mountain

Description

Melo Mena Mountain, in Bursa Woreda, rises to 3040 meters and is part of the Sidama Mountain range. Shaped by natural erosion, the mountain offers excellent hiking opportunities, with views of valleys, cultural villages, and dense forests. Its dramatic landscapes make it a prime destination for eco-tourism. It is currently visited by local tourists.

Accessibility

The site is directly accessible from a secondary road in good condition. Access via footpath is difficult.

Location

Bursa Woreda, Southern Sidama Zone.

G9 - Banko Marikos Mountain

Type

Mountain

Description

Banko Marikos Mountain, located in Dara Woreda, is a prominent natural feature with remarkable geotourism potential.It rises from a base elevation of approximately 2010 meters to a peak elevation of about 2460 meters asl. Its dramatic escarpments, lush green hills, and rich agricultural landscapes make it an attractive destination for nature lovers and adventure seekers. The mountain's geological formations, shaped by tectonic forces, create stunning vistas overlooking the Rift Valley. It also holds cultural significance due to the presence of megalithic heritage elements, adding to its appeal for heritage tourism. The area offers excellent trekking routes with rewarding scenic views and opportunities for wildlife observation.

Accessibility

The site is accessible via an unsurfaced road in good condition.

Location

Dara Woreda, Southern Sidama Zone.

G10 - Dara Mechisho Mountain

Type

Mountain

Description

Dara Mechisho Mountain, located near Dila Town in Dara Otilcho Woreda, is a natural attraction with significant tourism potential, offering a blend of biodiversity and adventure tourism. It rises from a base elevation of approximately 1,600 meters to a peak elevation of about 1,700 meters asl. The surrounding forest is home to medicinal plants, endemic wildlife, and migratory birds. The area provides an immersive natural experience, making it ideal for eco-friendly lodges and campsites. With its high elevation, the mountain offers breathtaking panoramic views of valleys, coffee plantations, and expansive landscapes, attracting nature lovers and hikers.

Accessibility

The site is directly accessible via a secondary road in good condition.

Location

Dara Otilcho Woreda, Southern Sidama Zone.

G11 - Sraro Senkelle Mountain

Type

Mountain

Description

Sraro Senkelle Mountain, located between Oromia and Sidama regional states, lies on the western edge of the Main Ethiopian Rift Valley, northwest of Hawassa.It rises from a base elevation of approximately 1,820 meters to a peak elevation of about 2,200 meters asl. The mountain possesses strong geotourism potential due to its geological significance, breathtaking landscapes, and rich biodiversity. It offers expansive views of the surrounding valleys and forests, making it an excellent location for trekking and nature walks. The mountain is also part of the Senkelle Swayne's Hartebeest Sanctuary and is frequently visited by both domestic and international tourists.

Accessibility

The site is accessible via an unsurfaced road in good condition.

Location

Hawassa Zuria Woreda, Northern Sidama Zone.

G12 - Hantate Escarpment

Type

Fault and garben

Description

The Hantate Escarpment, part of the Main Ethiopian Rift System, is a geologically significant site.It rises from a base elevation of approximately 1,680 meters to a peak elevation of about 1,825 meters asl. Its well-developed horst and graben structures make it an important location for understanding continental rifting and plate tectonics. The rugged terrain, fault scarps and deep valleys offer spectacular panoramic views, attracting visitors interested in nature, photography, and adventure tourism. Due to its proximity to the national park, it gets a chance to be visited by both local and international tourists.

Accessibility

The site is accessible via an unsurfaced road in good condition.

Location

Loka Abaya Woreda, Central Sidama Zone.

G13 – Kokite Mountain

Type

Mountain

Description

The Kokite Mountain reaches 2804 m asl and is situated near the Bale Eco-region (Bale Mountains National Park). It is characterised by remnant patch of moist afro-monatne forest with characteristic species such as *Croton macrostachyus* , *Millettia fergunia*, *Celtis africana*. Offers a stunning view of the attractive landscape

Accessibility

There is no access road: the site is reached via a difficult footpath, requiring about one hour of hiking from secondary road.

Location

Chiree Woreda, Eastern Sidama Zone.

G14 - Abaya Lake

Type

Lake

Description

Lake Abaya is the largest Rift Valley lake partly within Sidama. Its reddish-brown waters result from high sediment loads carried by the Bilate and Gidabo rivers. The lake is surrounded by Loka Abaya National Park and nearby hot springs, making it a popular destination. The contrast between the lake's waters, surrounding forests, and rugged terrain creates a visually captivating environment. Trails around the lake and within the national park allow visitors to experience diverse landscapes and viewpoints. It is included in the SCTSB website as part of the National Park and it is frequently visited by both domesitc and international tourists.

Accessibility

The site is accessible via an unsurfaced road, which is in good condition.

Location

Loka Abaya Woreda, Central Sidama Zone.

G15 - Hawassa Lake

Type

Lake

Description

Hawassa Lake is the smallest of Ethiopia's Rift Valley lakes, located near Hawassa city, about 275 km south of Addis Ababa. It is home to various wildlife, including colobus monkeys, olive baboons, grivet monkeys, and hippopotamuses. Around 60 bird species have been recorded, including endemic species such as the thick-billed raven and wattled ibis. The lake supports a vibrant fishing industry, with fresh fish sold at the bustling Hawassa Fish Market. Scenic boat rides offer breathtaking views of the lake, while numerous lakefront hotels provide relaxing retreats. The lake is included in the SCTSB website and it is regularly visited by both domestic and international tourists.

Accessibility

The site is directly accessible from a primary road.

Location

Hawassa City Administration.

G16 - Boroda Lake

Type

Lake

Description

Boroda Lake is a small freshwater highland lake in Shafamo Woreda. Despite its modest size, the lake supports diverse aquatic life and serves as a crucial water source for local communities. The surrounding landscape is rich in biodiversity, featuring a variety of flora and fauna. Scenic trails around the lake and nearby hills provide panoramic views, making it an ideal spot for nature lovers and outdoor enthusiasts.

Accessibility

The site is accessible via an unsurfaced road in good condition, followed by a 30-minute footpath walk.

Location

Shafamo Woreda, Eastern Sidama Zone.

G17 - Logita and Galana Waterfalls

Type

Waterfall

Description

Logita and Galana Waterfalls, located in Bona Woreda, are spectacular natural features with dramatic cascades. With a breathtaking 10 meter drop and an impressive 15 meter width, the waterfall is a striking natural attraction. The waterfalls are surrounded by lush vegetation, diverse wildlife, and endemic bird species. The scenic beauty, combined with the presence of Logita Lodge nearby, enhances the site's potential for nature-based tourism. The waterfalls provide a tranquil retreat and an opportunity for adventure tourism and are included in the SCTSB website. They are indeed frequently visited by both domestic and international tourists.

Accessibility

The site is directly accessible via a primary road, with additional access via surfaced roads and easy footpaths.

Location

Bona Zuria Worada, Eastern Sidama Zone.

G18 - Upper Logita Waterfall

Type

Waterfall

Description

The Upper Logita Waterfall in Bansa Woreda offers strong geotourism potential due to its stunning natural features and rich biodiversity. With a breathtaking 5-meter drop and an impressive 20-meter width, the waterfall is a striking natural attraction. Surrounded by picturesque landscapes, the site provides an ideal setting for nature photography. The trails leading to the waterfall attract adventure enthusiasts, making it a prime eco-tourism destination.

Accessibility

The site is directly accessible via a primary road, with an easy footpath leading to the waterfall.

Location

Bansa Woreda, Eastern Sidama Zone.

G19 - Bo'nora Waterfall

Type

Waterfall

Description

Bo'nora Waterfall, the largest in Sidama, is located 133 km southeast of Hawassa in Bensa Woreda. With a breathtaking 15-meter drop and an impressive 30-meter width, the waterfall is a striking natural attraction. The surrounding area features Bo'nora Cave, endemic bird species, diverse landscapes, and indigenous forests. The combination of scenic beauty and ecological richness makes it a top site for eco-tourism and adventure tourism. The site is included in the SCTSB website and it is regularly visited by domestic and international tourists.

Accessibility

The site is accessible via a secondary road in good condition, with additional footpath access.

Location

Bensa Woreda, Eastern Sidama Zone.

G20 - Wondo Genet Forest Waterfall

Type

Waterfall

Description

The Wondo Genet Forest Waterfall is fed by streams from the Wondo Genet Highlands, an area known for its abundant rainfall and lush vegetation. With a breathtaking 10 meter drop and an impressive 15 meter width, the waterfall is a striking natural attraction. The waterfall is surrounded by dense green forests, home to various wildlife species. The scenic forest trails leading to the waterfall provide excellent opportunities for hiking, birdwatching, and nature photography, making it an ideal destination for eco-tourism. It is not directly included on the SCTSB website Tourism and Sport Bureau, but it is part part of the Wondo Genet Route, highlighting its birdlife, dense forests, waterfalls and hot springs. It is indeed a popular attraction for both domestic and international tourists.

Accessibility

The site is directly accessible via a primary road, with an additional tarred road and an easy footpath leading to the waterfall.

Location

Wondo Genet Woreda, Northern Sidama Zone.

G21 - Asaro Waterfall

Type

Waterfall

Description

Asaro Waterfall, located in Bura Woreda near Bo'nora Waterfall, is a stunning natural attraction accessible through scenic hiking routes. With a breathtaking 25-meter drop and an impressive 20-meter width, the waterfall is a striking natural attraction. The trek to the waterfall provides visitors with breathtaking views of the surrounding countryside and landscapes, offering a peaceful and immersive natural experience. The site occasionally receives visits from both domestic and international tourists.

Accessibility

The site is accessible via an unsurfaced road in good condition, followed by a difficult footpath.

Location

Bura Woreda, Eastern Sidama Zone.

G22 - Dara Mechisho Waterfall

Type

Waterfall

Description

Dara Mechisho Waterfall, located between Machisho and Dilla town in Dara Otilcho Woreda, is a scenic natural attraction. Its proximity to Dara Mechisho Hot Spring enhances its tourism potential, offering visitors a unique combination of scenic beauty and wellness tourism. The surrounding vegetation creates a picturesque environment, making it a popular destination for nature lovers and relaxation seekers. It is frequently visited by both domestic and international tourists.

Accessibility

The site is directly accessible via a secondary road in good condition, with an easy footpath leading to the waterfall.

Location

Dara Otilcho Woreda, Southern Sidama Zone.

G23 - Yaye Waterfall

Type

Waterfall

Description

Yaye Waterfall, located in the scenic region of Arbegona, is a hidden gem known for its stunning natural beauty. The waterfall cascades down rocky cliffs, creating a serene and picturesque environment. Surrounded by lush vegetation and vibrant wildlife, the area provides a tranquil escape for visitors seeking relaxation and a connection with nature. It is not included in the SCTSB website, but it features in the evendo.com (Discover the Majestic Waterfall Yaye). Also, due to its proximity to Garamba, it is frequently visited from both local and international tourists.

Accessibility

The site is directly accessible via a secondary road.

Location

Arbegona Woreda, Central Sidama Zone.

G24 - Luda Waterfall

Type

Waterfall

Description

Luda Waterfall, located in Hula Woreda near Hagere Selam town, is a highland lake waterfall surrounded by dense vegetation. The moisture from the cascading water supports the lush greenery, making it an ideal site for eco-tourism activities such as nature walks. The scenic surroundings provide an excellent setting for relaxation and exploration. It is currently visited by local tourists.

Accessibility

The site is accessed via an unsurfaced road in good condition, followed by a 20-minute walk on a footpath. The waterfall is located in a gorge, with a difficult footpath leading to the site.

Location

Hula Woreda, Southern Sidama Zone.

G25 - Daricha Waterfall

Type

Waterfall

Description

Daricha waterfall located at an altitude of 1717 meter asl, is surrounded by dense moist afro-montane patch of forest with characteristic species such as *Croton macrostachyus* , *Millettia fergunia*, *Celtis africana*. Highly suitable for watching flowing water and different types of bird species such as hooded vulture, white backed vulture, Egyptian goose, common bulbul and mountain thrush.

Accessibility

There is no road access: the site is reached via a footpath.

Location

Chiree Woreda, Eastern Sidama Zone.

G26 - Dara Mechisho Hot Spring

Type

Hot spring

Description

Located between Machisho and Dila town, just 1 km west of the main Hawassa-Dila road and approximately 85 km from Hawassa city, Dara Hot Springs is administered by the Sidama Development Association. This natural geothermal site is well known for its therapeutic and recreational value, offering a peaceful environment where visitors can enjoy the soothing, mineral-rich waters believed to have healing properties. The site is frequently visited from both domestic and international tourists.

Accessibility

The site is directly accessible via a secondary road, which is in good condition.

Location

Dara Otilcho Woreda, Southern Sidama Zone.

G27 - Wondo Genet Hot Springs

Type

Hot spring

Description

Located near the town of Wondo Genet, 2.5 km east of the Shashemene-Wondo Genet-Hawassa main road and 30 km from Hawassa city, Wondo Genet Hot Springs is a renowned geothermal attraction celebrated for its natural beauty and therapeutic benefits. Nestled within verdant forests and rolling hills, the hot springs provide a serene retreat. The warm, mineral-rich waters are believed to have medicinal properties, attracting both tourists and local visitors seeking relaxation and relief from ailments such as joint pain and skin conditions. The site is included in the SCTSB website and it is regularly visited by both domestic and international tourists.

Accessibility

The site is directly accessible via a secondary road.

Location

Wondo Genet Woreda, Northern Sidama Zone.

G28 - Shalo Hot Spring

Type

Hot spring

Description

Shalo hot spring is located in the central part of the Main Ethiopian Rift, north of the Hawassa Caldera, between Oromia and Sidama, 5 km east of the main road. This geothermal site is renowned for its relaxing, scenic surroundings. Set within the Rift Valley's dynamic landscapes, the hot spring provides a tranquil escape. Its mineral-rich waters, naturally heated by geothermal activity, are believed to have therapeutic properties, making it a favoured destination for wellness tourism.

Accessibility

The site is accessible via an unsurfaced road, which is in good condition.

Location

Tula Woreda, Northern Sidama Zone.

G29 - Burqito Hot Spring

Type

Hot spring

Description

Burqito hot spring is located in the Hawassa Caldera, 3 km east of the main Hawassa-Dila road. Its mineral-rich waters, naturally heated by geothermal activity, are known for their therapeutic properties, attracting both domestic tourists and local visitors. The site is surrounded by scenic landscapes, and various accommodations have been established nearby to provide visitor services, enhancing the tourism experience. The site is not included in the SCTSB website, but it features in the evengo.com website (Revitalize at Burqito Hot Springs) and it is currently visited by both domestic and international tourists.

Accessibility

The site is accessible via an unsurfaced road, which is in good condition.

Location

Hawassa City Administration.

G30 - Gidawo Hot Spring

Type

Hot spring

Description

Gidawo hot spring is a geothermal site located near Yirgalem town, adjacent to Yirgalem Hospital. Administered by the SDA, it serves both foreign tourists and local visitors. The surrounding lush green forest, featuring old-aged trees, enhances the site's natural appeal. The area is also home to various wildlife species, including primates such as guereza colobus and other common birds. The site is included in the SCTSB website and it is regularly visited by domestic and international tourists.

Accessibility

The site is directly accessible via a surfaced secondary road in good condition.

Location

Yirgalem City Administration, Central Sidama Zone.

G31 - Loka Abaya Hot Springs

Type

Hot spring

Description

Loka Abaya Woreda hosts more than 10 thermal springs along the shores of Lake Abaya. The mineral composition of these hot springs is believed to have therapeutic properties, attracting visitors for wellness tourism. The surrounding volcanic terrain, coupled with the lake's vast expanse, creates a visually striking destination, blending geological, ecological, and recreational attractions. It is not directly included in the SCTSB website, but is is part of the National Park.

Accessibility

The site is accessible via an unsurfaced road, which is in good condition.

Location

Loka Abaya Woreda, Central Sidama Zone.

G32 - Genale River Gorge

Type

River gorge and ravine

Description

The Genale River Gorge, located in the southeastern part of Sidama, forms a deep valley cutting through the eastern highlands. It serves as a natural boundary between the Sidama Highlands and the Bale Highlands. The gorge features dramatic cliffs, deep valleys, and striking geological formations, offering breathtaking views. The rugged terrain and picturesque surroundings provide excellent opportunities for hiking and trekking adventures.

Accessibility

The site is directly accessible via a primary road in good condition, with additional access through an unsurfaced road in good condition.

Location

Chabe Gambelto, Aroresa and Hoko Woredas, Eastern Sidama Zone.

G33 - Garamba Mineral Water

Type

Mineral water

Description

Garamba Mineral Water originates from Chanche Spring, located on the northeastern slopes of Garamba Mountain in Arbegona Woreda. The water is naturally rich in minerals and nutrients, making it highly valued by locals. The site is known for its fresh, high-quality spring water and its potential as a sustainable tourism attraction.

Accessibility

The site is accessible via an unsurfaced secondary road in good condition.

Location

Arbegona Woreda, Central Sidama Zone.

G34 - Green Rural Landscapes

Type

Scenic view and viewpoint

Description

Sidama is characterized by a dense rural settlement pattern, where villages are interwoven with ensete, coffee, khat, fruit plantations, and agroforestry crops. From elevated vantage points such as Garamba Mountain and Agana Mountain, visitors can witness the ecological landscape of the region. The traditional villages consist of closely built bamboo houses, creating a distinct architectural aesthetic that reflects Sidama's cultural and environmental adaptation. These settlements highlight the sustainable use of land, communal living, and indigenous farming techniques that have supported local livelihoods for generations.

Accessibility

The site is accessible via a tarred road in good condition. A 4×4 vehicle is recommended for deeper exploration. Footpaths are also available for those who prefer hiking.

Location

Arbegona Woreda Central Sidama Zone and Bura Woreda Eastern Sidama Zone.

G35 - Shafamo Land

Type

Unique landscape

Description

Shafamo Land, located in Shafamo Woreda in the eastern Sidama highlands, features a distinctive cultural and natural landscape. The area is characterized by traditional bamboo and grass houses, dense ensete plantations, and terraced farmland with scenic views of the surrounding countryside. The site represents the daily life of rural communities but is not a designated protected area. The Shafamo Tracing Land is part of the Green Legacy Initiative, which aims to protect and manage the land to ensure a sustainable ecological balance. Efforts are focused on preventing soil erosion and managing water resources

Accessibility

The site is accessible via a tarred road in good condition, with easy access by footpath.

Location

Shafamo Woreda, Eastern Sidama Zone.

G36 - Bubissa Degraded Land

Type

Scenic view and viewpoint

Description

Bubissa Degraded Land is situated along the Genale Geological Gorge. Historically affected by unsustainable agricultural practices, the land has undergone a gradual process of degradation. However, local government-led reforestation programs are working toward restoring its natural landscape. The site offers a unique opportunity for visitors to observe the impact of environmental degradation and conservation efforts while enjoying panoramic views of the surrounding area.

Accessibility

The site is accessible via a secondary road in good condition, with additional access via a tarred road and an easy footpath.

Location

Chabe Ganbelto Woreda,Eastern Sidama.

G37 - Bubissa Gold Mining Site

Type

Mining site

Description

Bubissa Gold Mining Site is located on the banks of the Genale River in Chabe Ganbelto Woreda. The site holds significant tourism potential due to its rich gold deposits, geological formations, and scenic landscapes. Visitors can explore insights into gold mineralization, traditional and modern mining methods, and the environmental impact of resource extraction.

Accessibility

The site is accessible via an unsurfaced road in good condition.

Location

Chabe Ganbelto Woreda, Eastern Sidama Zone.

Figure 12: Bo'nora Waterfall



5.2 Wildlife and biodiversity

Sidama's diverse landscapes range from highland forests and escarpments to wetland ecosystems, providing habitats for a wide range of wildlife. According to the Environmental Protection Authority (EPA)[42], the natural forest coverage in Sidama is 25,427 ha, while plantation forests cover 432,912 ha. These forests serve as crucial habitats for numerous plant and animal species, playing a vital role in conservation and eco-tourism.

The region is home to an impressive variety of **flora and fauna**, including several endemic species. Large mammals such as the Menelik's bushbuck, Bale monkey, and Swayne's hartebeest are found in different protected areas, along with predators like leopards, hyenas, and golden jackals[43]. Primates, including colobus monkeys, olive baboons, and grivet monkeys, are commonly observed in the region's forests. The wetlands, rivers, and lakes sustain aquatic species such as fish, crocodiles, and hippopotamuses, while the high-altitude and forested regions provide ideal habitats for diverse bird species, including migratory and endangered birds.

Sidama's importance as a **bird conservation** area is highlighted by its status as part of the Rift Valley flyway, one of the most significant migratory bird routes in Africa. Lake Hawassa and Lake Abaya are recognized globally for supporting migratory birds, hosting species such as the wattled ibis, thick-billed raven, black-winged lovebird, and Ethiopian oriole. In addition to endemic and resident bird species, these lakes and surrounding wetlands provide crucial stopover sites for Palearctic and intra-African migrants[44][45][46].

Protected areas play a key role in conserving Sidama's biodiversity. The region hosts five major wildlife and biodiversity sites: Loka Abaya National Park, Senkelle Swayne's Hartebeest Sanctuary, Lake Hawassa, Wondo Genet Natural Reserved Forest, and Garamba Mountain Conservation Area.

Several other areas contribute to conservation efforts, including Natural Sacred Forests and Forest Conservation Areas.

Sacred forests are remnants of natural forests preserved and managed by local communities through social and spiritual laws for traditional and religious purposes. These forests have been protected for generations due to their cultural significance, and activities such as tree cutting or resource extraction are often restricted or prohibited entirely based on community beliefs.

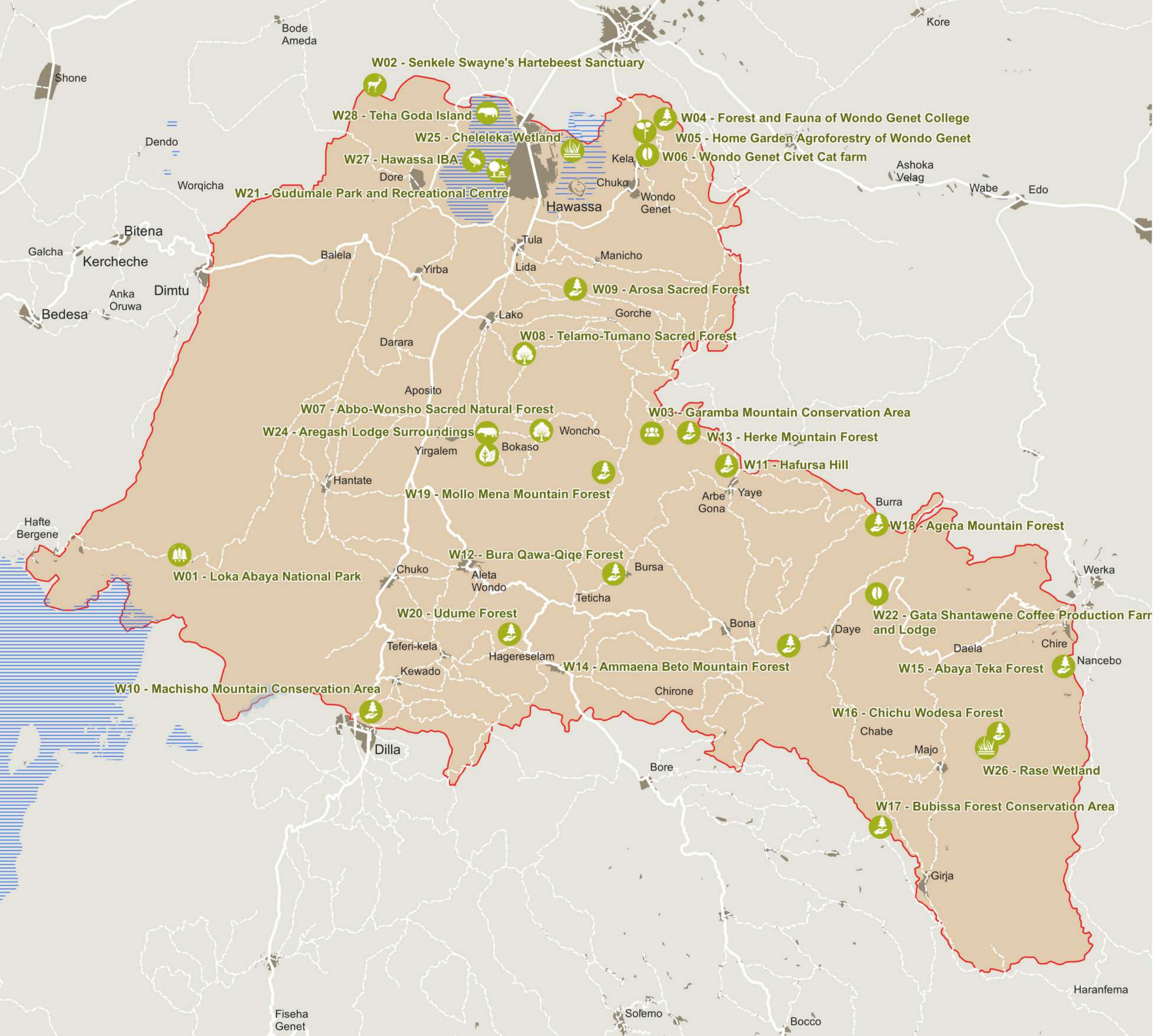
Forest Conservation Areas are designated patches of remnant forests recognized for their biodiversity conservation value and ecosystem regulation. These forests are protected due to their ecological importance, even though they may be small in size. As highlighted in section 6.2, habitat fragmentation is a major driver of biodiversity loss and researches suggest that sets of small habitat patches can support more species than a single large patch of the same total area, making the conservation of fragmented forest patches particularly valuable. In Sidama, the preservation of these Forest Conservation Areas helps maintain species diversity and strengthens the region's overall ecological stability.

Government efforts to manage and protect these areas reflect the growing recognition of their ecological value and potential for sustainable tourism[47] [48].

The region's biodiversity faces several challenges, including habitat loss due to deforestation, agricultural expansion, and settlement growth. Climate change and human-wildlife conflicts further threaten the sustainability of wildlife populations (see section 6.2). Despite these challenges, conservation initiatives and ecotourism development are seen as key strategies to ensure the long-term preservation of Sidama's natural wealth.

Sidama's unique combination of forests, wetlands, lakes, and mountainous terrains makes it an exceptional destination for wildlife observation, birdwatching, and eco-friendly tourism. Strengthening conservation measures and promoting sustainable land-use practices will be essential in preserving the region's rich biodiversity for future generations.

Wildlife and biodiversity



Legend

- Agroforestry
- Avian/Bird
- Coffee production
- Community conservation area
- Fauna
- Flora
- Forest conservation area
- National Park
- Sacred forest
- Wildlife sanctuary
- Wetland
- Zoological garden

- Main paved road
- Unpaved road
- Water body
- Built-up area
- Regional boundary

N

0 10 20 km

Source: expert analyses and research

W01 - Loka Abaya National Park

Type

National Park

Description

Loka Abaya National Park is the only national park in the region. It covers approximately 500 km² of land and water, with altitudes ranging from 1178 to 1650 meters asl. The park shares part of Lake Abaya to the south-west, from which it derives its name. It is home to 198 recorded vascular plant species, including three red-listed plants, four endemic species, and several medicinal and economically important tree species. Wildlife includes 28 species of large and medium-sized mammals, notably the greater kudu, which serves as the park's flagship species. The park also hosts endangered species such as the African wild dog, lion, leopard and hippopotamus. Also, the park includes 134 bird species, including near-endemic, critically endangered, near-threatened and migratory species. It is included on the SCTSB website.

Accessibility

The site is accessible via an unsurfaced road in poor condition, with potholes, cracks, and susceptibility to flooding.

Location

Loka Abaya Woreda, Central Sidama Zone.

W02 - Senkelle Swayne's Hartebeest Sanctuary

Type

Sanctuary

Description

Located near Hawassa, this sanctuary spans the inter-boundary region between Oromia and Sidama. The sanctuary covers an area of 54 km^2. Its elevation ranges from 1,904 to 2,211 meters asl. It is home to over 36 mammal species, including a population of more than 500 of the endemic and endangered Swayne's hartebeest. The area also hosts 350 bird species, including one endemic and several migratory species. The sanctuary is the best place to observe the sub-species Swayne's hartebeest and a variety of birdlife. Natural viewpoints in the sanctuary offer scenic vistas of the surrounding landscape, including Lake Hawassa and associated wildlife. The site is currently visited by tourists.

Accessibility

The site is directly accessible via a secondary road.

Location

Between Hawassa Zuria Woreda, Northen Sidama Zone, Sidama Region and Siraro Woreda, West Arsi Zone, Oromia Region.

W03 - Garamba Mountain Conservation Area

Type

Community conservation area

Description

Garamba Mountain is covered by remnant dry-evergreen Afromontane. It was once part of the continuous Arsi-Bale Mountain Chain but has been fragmented due to agricultural expansion and human settlement. The mountain covers 12.5 km^2, altitude ranges from 2000 to 3368 meters asl. The area hosts 76 floristic plant species, with dominant tree species including alpine bamboo and *Hypericum revolutum*. It includes 10 species of large mammals, such as the endemic Bale monkey, Menelik's bushbuck and the vulnerable leopard, as well as 74 bird species, including Ethiopian and Eritrean endemics such as the wattled ibis, thick-billed raven and black-winged lovebird, but also critically endangered like the hooded vulture, palearctic migrants such as the yellow wagtail and alpine swift. It is included on the SCTSB website and it is currently visited by tourists.

Accessibility

The site is accessible via a secondary road in good condition. Additional access is available via an unsurfaced road and a difficult footpath.

Location

Arbegona Woreda, Eastern Sidama Zone.

W04 - Forest and Fauna of Wondo Genet College

Type

Fauna and forest conservation area

Description

The forests of Wondo Genet College consist of both natural and plantation forests, with a total of 240 recorded vascular plant species. It covers an area of 9.58 km^2. The altitudinal range of the study area is from 1770 to 2584 m asl. The area is home to 27 large mammal species, including the endemic Menelik's bushbuck. The forests also support 137 bird species, of which 33 are migratory and seven are endemic to Ethiopia and Eritrea. Commonly observed birds include the thick-billed raven, black-winged lovebird, Ethiopian oriole, wattled ibis, banded barbet, and the endemic yellow-fronted parrot. Additionally, the area hosts 137 recorded butterfly species. The presence of diverse wildlife, including small mammals and insects, further enhances the site's appeal for nature enthusiasts. It is included on the SCTSB website.

Accessibility

The site is directly accessible via a primary tarred road in good condition.

Location

Wondo Genet Woreda, Northen Sidama Zone.

W05 - Home Garden Agroforestry of Wondo Genet

Type

Agroforestry system

Description

Agroforestry has been the predominant agricultural practice in Wondo Genet for centuries occupying roughly 5760 km^2 of the area. The altitude range is generally between 1700 and 2300 meters asl. The region's home gardens are composed of a mix of trees, shrubs, and crops, integrating ensete (*enset ventricosum*), maize (*Zea mays*), coffee (*Coffea arabica*), sugar cane (*Saccharum spp*). Tree components include *Cordia Africana, Ficus Vasta, Celtis Africana* and fruit trees such ad avocado (*Persea americana*), Cordia africana, and Mangifera indica, along with other indigenous species. This farming system plays a crucial role in food security while contributing to environmental conservation and sustainable rural development.

Accessibility

The site is directly accessible via a primary tarred road in good condition.

Location

Wondo Genet Woreda, Northen Sidama Zone.

W06 - Wondo Genet Civet Cat Farm

Type

Coffee production

Description

Wondo Genet hosts a civet cat farm where civets are kept for the production of civet musk and civet coffee. This farm sits on area of roughly 0.001 km^2 with plans to expand the site into a modern farm allowing civets to freely room in to their natural habitat. Civet musk is a highly valued export commodity, traditionally used as a fixative in high-end perfumes. Historical records suggest that the Queen of Sheba presented civet musk as a gift to King Solomon. A single civet cat can produce up to 32 grams of musk per month, with a minimum market price of USD 5 per gram, generating an estimated revenue of USD 160 per month per civet. Civet coffee, known for its distinctive taste, is another valuable product, with prices reaching up to USD 100 per cup in international markets, particularly in the USA and Europe.

Accessibility

The site is accessible via a secondary unsurfaced road in good condition.

Location

Wondo Genet Woreda, Northen Sidama Zone.

W07 - Abbo-Wonsho Sacred Natural Forest

Type

Sacred forest

Description

Abbo-Wonsho Sacred Natural Forest serves as a spiritual and cultural center for the Sidama people, playing an important role in indigenous beliefs and conflict resolution. Located in Wonsho Woreda, 12 km north of Yirgalem, the forest covers 0.964 km^2. It has an altitude range of 1,978 meters (west end) to 2,149 meters (east end) asl. It is dominated by giant trees such as *Afrocarpus falcatus*, *Croton macrostachyus*, *Prunus africana*, and *Pouteria adolfi-friedericii*. The site is also home to various mammal species such as colobus gureza, common duiker, grivet monkey, common warthog and bird species, including the silvery-cheeked hornbill and African forest oriole.

Accessibility

The site is directly accessible via a primary tarred road in good condition, with additional access via an unsurfaced secondary road in good condition and an easy footpath.

Location

Wonsho Woreda, Central Sidama Zone.

W08 - Telamo-Tumano Sacred Forest

Type

Sacred forest

Description

Telamo-Tumano Sacred Forest is a culturally significant forest endowed with rich biodiversity. Located at about 1900 meter asl, it occupies a small area of about 0.001 km^2. The site is particularly significant for the Tumano clan, as the burial place of the clan's founder. It is considered holy, and traditional beliefs prohibit the collection of even dried leaves from the area. Due to these cultural protections, the forest has been well-preserved, with good regeneration of seedlings and saplings. The dominant tree species include *Adolfedric poluteria*, *Afrocarpus falcatus*, *Prunus africans*, *Cletis africana* and *Croton macrostachyus*. Reported wildlife includes colobus monkeys, grivet monkeys, and spotted hyenas, while notable bird species include the silvery-cheeked hornbill.

Accessibility

The site is accessible via a secondary unsurfaced road in good condition.

Location

Shebadino Woreda, Northen Sidama Zone.

W09 - Arosa Sacred Forest

Type

Sacred forest

Description

Arosa Sacred Forest is the burial site of Arosa, the great-grandfather of the Gara clan. Located in Hawela Woreda, Gera Galo Kebele, it serves as a holy ritual site and a place for traditional conflict resolution. It has an area of 0.021 km^2. The main ritual celebration takes place annually in February. The core of the forest is dominated by indigenous trees such as *Afrocarpus falcatus* and *Croton macrostachyus*, while the buffer zone is covered with exotic trees like *Eucalyptus spp*. The forest is home to primates such as the grivet monkey and Colobus guereza, as well as bird species like the wattled ibis, African forest oriole, and Rüppell's robin-chat. Due to its cultural significance, the area is strictly protected, and any form of tree cutting, including collecting deadwood, is considered taboo.

Accessibility

The site is directly accessible via a secondary road in good condition.

Location

Hawela Woreda, Northen Sidama Zone.

W10 - Machisho Mountain Conservation Area

Type

Forest conservation area

Description

Machisho Mountain Conservation Area is situated in Dara Woreda, southern Sidama Zone. The forest has an altitude ranges from 1500 to 1900 meter asl. The forested area covers 0.46 km^2 and is dominated by tree species such as *Acacia spp.*, *Croton macrostachyus*, *Celtis africana*, *Cordia africana*, *Ficus vasta*. It is home to diverse wildlife, including bushbuck, bush pig, klipspringer, spotted hyena, olive baboon, and Colobus guereza. The area is in close proximity to Dilla town and offers a scenic view of Lake Abaya. The vegetation consists of dry *Combretum-Terminalia* forest, with dominant species including *Syzygium guineense*. Reports indicate the presence of leopards, warthogs, common jackals, and various bird species such as red-eyed dove, African citril, pied crow.

Accessibility

The site is directly accessible via a tarred primary road in good condition.

Location

Dara Woreda, Southern Sidama Zone.

W11 - Hafursa Hill

Type

Forest conservation area

Description

Hafursa Reserve Area is a forested hill in Arbegona Woreda, near Yaye town. The area is densely covered with bamboo and highland forests, supporting diverse wildlife. Species such as golden jackal, spotted hyena, and birds such as Abyssinian salty flycatcher, speckled sunbird, and common bulbul inhabit the reserve. Various species of insects including butterflies are also found in the study area. The forest plays a vital role in biodiversity conservation and offers potential for ecotourism. It is indeed included on the SCTSB website.

Accessibility

The site is directly accessible via a primary road and a secondary road.

Location

Arbegona Woreda, Central Sidama Zone.

W12 - Bura Qawa-Qiqe Forest

Type

Forest conservation area

Description

Qawa-Qiqe Forest, is a highland forest composed mainly of indigenous tree species with high medicinal value. It occupies about 0.17 km^2. The altitude of the area ranges from 2420 to 2540 meter asl. The forest is home to a variety of wildlife, including golden jackal, spotted hyena, rabbit, and numerous bird species such as silvery cheeked horn bill, mountain thrush, white backed vulture, and white cheeked turaco. Its ecological importance is underscored by the diversity of plant and animal life it sustains.

Accessibility

The site is directly accessible via a secondary road. The access road is unsurfaced and in poor condition, with potholes and susceptibility to flooding. Some areas require trekking along difficult footpaths.

Location

Burra Woreda, Eastern Sidama Zone.

W13 - Herke Mountain Forest

Type

Forest conservation area

Description

Herke Mountain Forest is located in Arbegona Woreda, eastern Sidama, near Geramba Mountain. The forested slopes are dominated by indigenous tree species such as *Hypericum revolutum, Hagenia abyssinica*, *Juniperus procera* at higher elevations, while alpine bamboo and exotic trees like *Cupressus lusitanica* dominate the lower slopes. The forest supports primates, including anubis baboons and grivet monkeys, and various bird species such as mountain thrush, pied crow, and common bulbul. The lower areas are increasingly affected by human settlement and agriculture.

Accessibility

The site is accessible via an unsurfaced road in good condition, though some sections may require trekking on difficult footpaths.

Location

Arbegona Woreda, Eastern Sidama Zone.

W14 - Ammaena Beto Mountain Forest

Type

Forest conservation area

Description

Located in Bensa Woreda, Ammaena Beto Mountain Forest consists of two peaks, Amma (mother) and Beto (child), split by the road connecting Aleta Wondo and Daye towns. The mid and higher elevations are covered by natural bushy forest, while the lower slopes are increasingly occupied by agroforestry systems, including coffee and ensete cultivation. The area is home to olive baboons, grivet monkeys, Colobus guereza, leopards, and common duikers. Bird species include common bulbul, white backed vulture, and mountain thrush. Encroachment and deforestation pose challenges to its conservation.

Accessibility

The site is directly accessible via a primary road in good condition, though climbing to higher elevations requires trekking on steep footpaths.

Location

Bensa Woreda, Eastern Sidama Zone.

W15 - Abaya Teka Forest

Type

Forest conservation area

Description

Located at an altitude of 1684 meter asl, this forest is characterised by remnant patch of moist afro-monatne forest with characteristic species such as *Croton macrostachyus*, *Millettia fergunia*, *Ficus vasta*, *Ficus sur*. Mammal species such as Colobus gureza, grivet monkey, spotted hyena and common duiker are also commonly cited. Bird species that inhabit the forest include mountain thrush, hooded vulture, African dusky fly catcher, scarlet chested sun bird.

Accessibility

There is no road access: the site is reached via a difficult footpath, requiring about one and half hours of hiking from secondary road.

Location

Chiree Woreda, Eastern Sidama Zone.

W16 – Chichu Wodesa Forest

Type

Forest conservation area

Description

This forest is characterised by remnant patch of moist afro-monatne forest with characteristic species such as *Croton macrostachyus*, *Millettia fergunia*, *Celtis africana*. Mammal species such as Colobus gureza, grivet monkey, spotted hyena, common duiker are also commonly cited. Bird species that inhabit the forest include mountain thrush, common bulbul, African dusky fly catcher, variable sun bird.

Accessibility

There is no road access: the site is reached via a difficult footpath, requiring about one and half hours of hiking from secondary road.

Location

Aroresa Woreda, Eastern Sidama Zone.

W17 - Bubissa Forest Conservation Area

Type

Forest conservation area

Description

Bubissa Forest Conservation Area is located in Chambee-Gambelto Woreda, eastern Sidama. The area is rich in mineral resources such as marble and gold, with mining activities present along the Genale River. The vegetation consists of *Acacia-Commiphora* woodlands, wooded grasslands, and bushlands. *Acacia spp, Commiphora spp, Croton macrostachyus* are the characteristic species. Wildlife includes warthogs, bush pigs, olive baboons, grivet monkeys, common duikers, pythons, and spotted hyenas. The forest is also home to a variety of bird species such as red-eyed dove, African citril, yellow-billed kite.

Accessibility

The site is directly accessible via a primary road, with a tarred road in good condition. Reaching the hilltop requires trekking on footpaths.

Location

Chambee-Gambelto Woreda, Eastern Sidama Zone.

W18 - Agena Mountain Forest

Type

Forest conservation area

Description

Located in Burra Woreda, eastern Sidama, Agena Mountain Forest lies east of Burra town. The lower and middle elevations are primarily occupied by settlements and agricultural activities, including ensete and cereal farming. The upper slopes are covered by dry-evergreen forest, featuring characteristic tree species such as *Hypericum revoltum, Hygenia abyssnica* and *Juniperious procera*. The area supports wildlife including leopards, common jackals, olive baboons, grivet monkeys, common duikers, and spotted hyenas bird species such as African mourning dove, mountain thrush, fan-tailed raven. However, due to agricultural expansion, the forest is highly degraded.

Accessibility

There is no road access: the site is reached via a difficult footpath, requiring 40 to 50 minutes of hiking from Burra town.

Location

Burra Woreda, Eastern Sidama Zone.

W19 - Mollo Mena Mountain Forest

Type

Forest conservation area

Description

Located in Bursa Woreda, Mollo Mena Mountain features rugged landscapes and scenic viewpoints. However, extensive agricultural expansion has encroached upon much of the mountain, including its peaks. While bamboo woodlots and scattered dry-evergreen Afromontane tree species remain, the forest is nearly lost. Despite this, the area retains its potential for geotourism due to its striking topography and panoramic views.

Accessibility

The site is accessible via an unsurfaced road in poor condition, followed by a 30-minute hike along a difficult footpath.

Location

Bursa Woreda, Southern Sidama Zone.

W20 - Udume Forest

Type

Forest conservation area

Description

Located in Hula Woreda, west of the Genale River, Udume Forest spans over 0.48 km^2 area. It is a community-managed forest, formerly supported by the government's Safety Net Program. The dry-evergreen Afromontane forest is composed of *Afrocarpus falcatus, Masea lanceolata, Hygenia abyssnica,* and *Croton macrostachyus*. The forest is home to leopards, common jackals, olive baboons, grivet monkeys, common duikers, and spotted hyenas, as well as a variety of bird species such as silvery cheeked horn bill, Tambourine dove, and white cheeked turaco.

Accessibility

The site is directly accessible via an unsurfaced secondary road in good condition, located 2 km from the nearest asphalt road.

Location

Hula Woreda, Southern Sidama Zone.

W21 - Gudumale Park and Recreational Center

Type

Zoological garden

Description of the site

Gudumale Park and Recreational Center is primarily protected for its cultural significance, particularly as the central site for the Fichee Chambalaalla festival. However, the park is also home to primates, including the colobus guereza and grivet monkey, which are commonly seen and known for their friendly interactions with tourists. The park also hosts a variety of fish-eating birds, such as the marabou stork, great white pelican, and hamerkop, as well as forest and woodland birds, including the wattled ibis, sacred ibis, thick-billed raven, and woodland kingfisher. These avian species, combined with the park's scenic lakeside setting, contribute to its ecological and cultural appeal, making it an important site for both biodiversity and heritage conservation.

Accessibility

The site is directly accessible from a primary road.

Location

Hawassa City Administration.

W22 - Gata Shantawene Coffee Production Farm and Lodge

Type

Coffee production

Description

This coffee farm is surrounded by 1 km^2 of coffee-based agroforestry and it is situated at an altitude ranging from 2120 to 2210 meters asl. The area is characterized by indigenous shade trees such as *Mellettia ferruginea* (endemic) and *Croton macrostachyus*, which contribute to a dense forest canopy and a cool microclimate. The lodge provides accommodations, meeting halls, and traditional coffee ceremony spaces. Wildlife such as olive baboons, Colobus guereza, grivet monkeys, and common duikers are commonly spotted. The site is also a prime location for bird watching, with species like the wattled ibis and silvery-cheeked hornbill frequently observed.

Accessibility

The site is directly accessible from a secondary road, mostly surfaced and in good condition. The site is located near the surfaced road connecting Bensa to Chiree, a road which is under construction that will eventually connect to the Bale Mountains.

Location

Bensa Woreda, Eastern Sidama Zone.

W23 - Banko Marikos Mountain Forest

Type

Flora

Description

Located in Dara Woreda, southern Sidama, locally called Gudumo Gericho, is a high-altitude mountain forest. The peak retains a small patch of native forest with characteristic tree species such as *Masea lanceolata*, *Hygenia abyssnica* and *Croton macrostachyus*. Middle elevations contain eucalyptus plantations, while lower areas are dominated by bamboo wood lots, ensete cultivation, and settlements. Grivet monkeys are rarely spotted in the area. Few bird species such as red-eyed dove, white-backed vulture, yellow-billed kite are also rarely spotted from the area. The mountain provides good roosting ground for birds such as white-backed vulture.

Accessibility

The site is accessible via an unsurfaced secondary road in poor condition, followed by a steep and challenging footpath leading to the mountain's forested summit.

Location

Dara Woreda, Southern Sidama Zone.

W24 - Aregash Lodge Surroundings

Type

Flora and fauna

Description

Situated in Wonsho Woreda, near Yirgalem, Aregash Lodge spans over 0.12 km^2. It is bordered by the Ge'o River, a tributary of the Gidabo River. It is located in altitude range of 1776 meter asl. The area features indigenous trees such as *Croton macrostachyus*, *Prunus africana* and bamboo species. Coffee plants thrive within the forest, creating a rich agroforestry landscape. The lodge provides a unique wildlife experience, including a nightly spotted hyena feeding area for visitors. Other wildlife includes serval cats, Colobus guereza, grivet monkeys, and diverse bird species such as the silvery-cheeked hornbill, African forest oriole, and hooded vulture. It is included on the SCTSB website and it is currently visited by tourists.

Accessibility

The site is direct accessible via an unsurfaced secondary road in good condition.

Location

Wonsho Woreda, Central Sidama Zone.

W25 - Cheleleka Wetland

Type

Wetland

Description

Cheleleka Wetland is a seasonally flooded area that dries up significantly during the dry season. The Wetland is approximately 34 km^2. It is located at attitude of 1600 meter asl. Despite this, it supports wetland vegetation year-round, though extensive livestock grazing occurs along its borders. The wetland is an important habitat for a variety of aquatic birds. Observed species include the sacred ibis, wattled ibis, cattle egret, little egret, greater egret, and hooded vulture. The area faces several threats, including temporary settlements, extensive livestock grazing, water diversion, and drainage, particularly in the northern section of the wetland.

Accessibility

The site is accessible via an unsurfaced road in good condition.

Location

Tula Woreda, Northen Sidama Zone.

W26 - Rase Wetland

Type

Wetland

Description

This wetland is seasonally flooded and mostly used as grazing grounds. It a suitable site for watching different bird species such as Sacred ibis, Egyptian goose, Hooded vulture and Cattle egret and butterflies.

Accessibility

There is no access road, the site can be reached via a footpath (30 to 40 minutes walk), from a secondary road.

Location

Aroresa Woreda, Eastern Sidama Zone.

W27 - Hawassa IBA

Type

Avian – Bird

Description

Lake Hawassa is an Important Bird Area (IBA) that supports a rich diversity of avian species. The lake has an area of about 129 km^2. It is located at about 1680 meter asl. Approximately 60 bird species have been recorded along the lake's shoreline and surrounding woodlands. The lake serves as a vital feeding and breeding ground for migratory birds throughout different seasons. In addition to birdlife, Lake Hawassa hosts several mammal species, including colobus monkeys, olive baboons, grivet monkeys, and hippopotamuses. It is regarded as one of the best locations in Ethiopia for observing hippos in their natural habitat. It is partly included on the SCTSB website and is currently visited by domestic and international tourists.

Accessibility

The site is directly accessible from a primary road.

Location

Hawassa City Administration.

W28 - Teha Goda Island

Type

Fauna

Description

Teha Goda Island is a small island situated in the northern part of Lake Hawassa. It serves as an important habitat for a variety of aquatic bird species, making it a prime destination for birdwatching enthusiasts. Birds such as Great white pelicans, grey-backed heron, and cormorants can be easily spotted from the island. Visitors can also observe hippopotamuses in their natural environment, adding to the island's ecological appeal. The island's unspoiled landscape and tranquil setting make it an ideal retreat for nature lovers seeking a peaceful escape amidst the beauty of the lake.

Accessibility

The site is accessible by boat.

Location

Hawassa City Administration.

Figure 13: (right page) African sacred ibis and other birds, at Loka Abaya



5.3 Tangible cultural and historical heritage

Sidama possesses a rich array of tangible cultural and historical heritage, encompassing archaeological sites, megalithic monuments, traditional architecture, and historically significant structures. These heritage assets contribute to the cultural identity of the region and offer potential for tourism development. However, it should be mentioned that some of these assets are at risk of loss, due to the lack of proper conservation measures due, among others, to low budget allocation for the cultural sector[49].

Sidama's **archaeological landscape** includes rock art sites[50], megalithic fields, and other prehistoric remains. These sites provide insights into the early societies that inhabited the region and their cultural expressions. The Aroresa rock art site[51], located in the Aroresa woreda near the Gambelto River, features petroglyphs engraved on a 1.5-metre-high and 4.5-metre-long rock panel. The engravings primarily consist of geometric patterns and anthropomorphic figures, with some zoomorphic representations such as snakes. The absence of cattle imagery, which is common in other rock art sites in Ethiopia, suggests that the site had a ritualistic function associated with fertility practices. Alongside the rock art panel, fossilised animal remains and stone tools made of basalt cobbles that were likely used for carving were discovered in the cave.[52]

Sidama is home to numerous **megalithic sites**, many of which are believed to mark burial locations of past elites. The Banko Marikos stele field in Dara woreda features large phallic stelae, attributed to Dingama Koya, a legendary left-handed man associated with megalithic traditions. The megaliths at Shabe Dela and Chuko Futahe in Aleta Chuko woreda, situated 78 km from Hawassa, share stylistic similarities with those in neighbouring regions. An urban megalithic site with symbolic and ritual significance is found at Haramafama stele field in Hawassa City. Although lesser-known than Ethiopia's more prominent megalithic landscapes, these sites hold significant cultural and historical value and present opportunities for further research and heritage tourism development[53].

Historical built heritage

Sidama's built heritage includes structures that reflect the region's historical and cultural evolution, from sacred sites to urban monuments. The **Abo Cultural Place**, situated in Yirgalem, serves as a centre for Sidama spiritual and conflict resolution traditions. It hosts religious ceremonies, including Daasho (sacrificial offerings), and is surrounded by indigenous sacred forests.

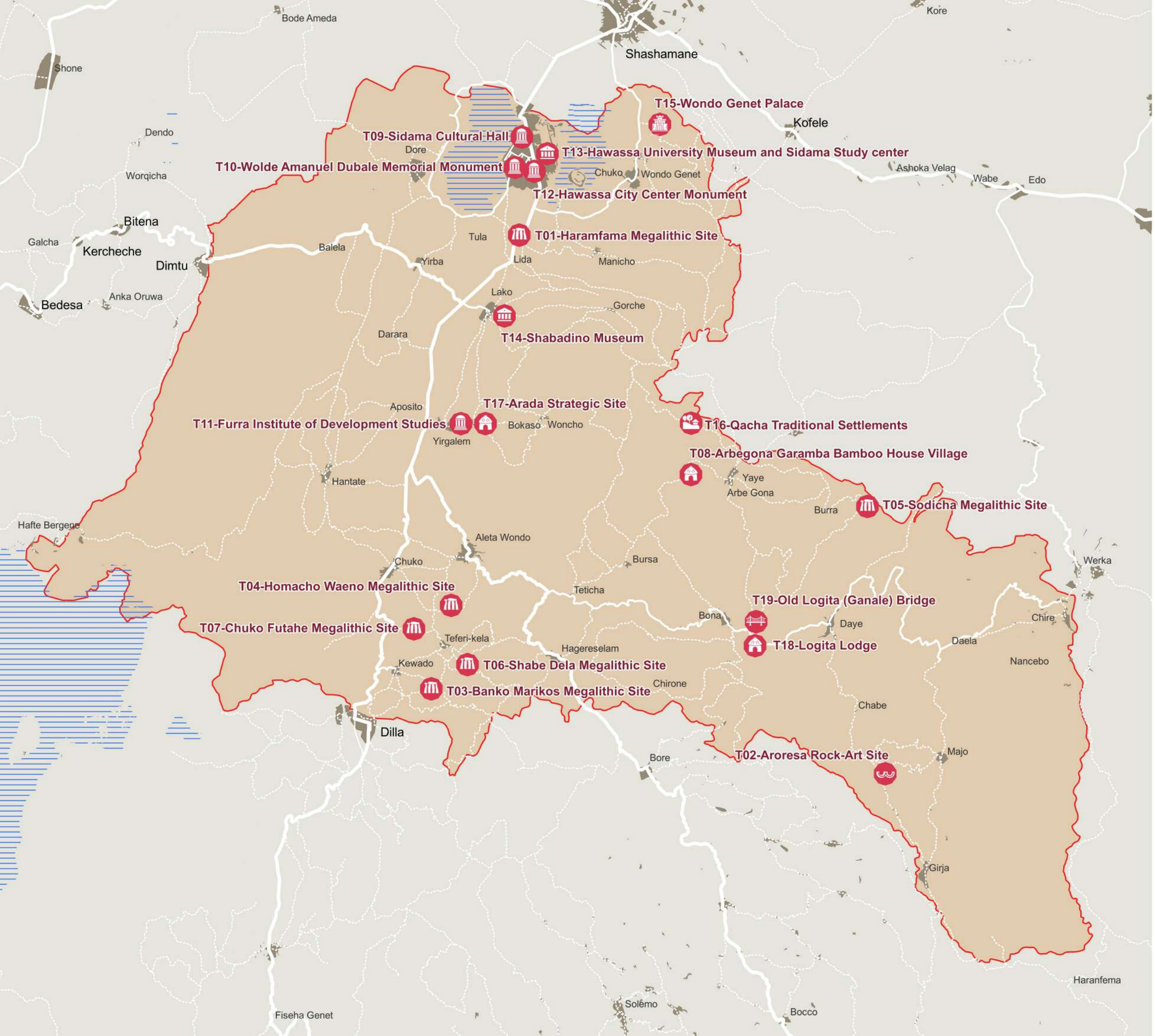
Traditional **Sidama houses**, particularly the bamboo and thatched tukuls, remain an important aspect of cultural identity. Villages such as Garamba, Burra, and Menno maintain these structures.

Another notable landmark is the **Hawassa Monument**, a cylindrical structure featuring mosaics that symbolise the false banana tree (ensete), a staple of Sidama culture.

St. Gabriel's Church in Hawassa is another significant cultural landmark. It serves as an important place of worship and pilgrimage, drawing thousands of visitors during annual religious celebrations. The church's architectural style, combined with its spiritual importance, makes it a key attraction for both domestic and international visitors.

Sidama's tangible cultural heritage represents a valuable resource for cultural identity and tourism. Prehistoric rock art, megalithic monuments, sacred sites, and traditional architecture provide a unique opportunity for both academic research and tourism development.

Tangible cultural and historical heritage



Legend

- Archaeological/Megalithic site
- Archaeological/Rock art
- Architecture/Bridge
- Architecture/Other historical
- Museum
- Orthodox Church
- Vernacular architecture
- Architecture/ Old town and village
- Architecture/Palace

- Main paved road
- Unpaved road
- Water body
- Regional boundary
- Built-up area

N

0 10 20 km

Source: expert analyses and research

T01 - Haramfama Megalithic Site

Type

Archaeological/Megalithic site

Description

Haramfama Megalithic Site is one of Sidama's ancient burial grounds, featuring anthropomorphic steles carved from single stone blocks of varying sizes. Though many are broken or displaced, a notable fallen stele, around 5 meters tall, is among the largest in Southern Ethiopia. Its original phallic feature may have eroded over time due to natural and human factors. The stelae are located within farmland and village compounds, belonging to the local farming community. Traditionally, such monuments are linked to Dingama Koyo, a legendary Sidama warrior, and may be contemporaneous with the Gedeo megaliths, dated to around 1000 BC. Despite relatively good accessibility, the site remains largely unvisited and in need of conservation.

Accessibility

The site is directly accessible from a primary road.

Location

Hawassa City Administration.

T02 - Aroresa Rock-Art

Type

Archaeological/Rock art

Description

Aroresa Rock-Art Site consists of a rock panel measuring 4.5 meters in length and 1.5 meters in height featuring zoomorphic (notably a snake) and geometric petroglyphs, indicating ritualistic representation and possible links to fertility rites. Engravings of reproductive organs echo the phallic symbolism of regional megalithic sites. Fossilised animal remains and carved stone tools found nearby suggest prehistoric occupation. Unlike other regional sites focused on pastoral life, Aroresa stands out for its ritual and symbolic emphasis. The site has no visitor facilities and is mainly visited by researchers.

Accessibility

The site is accessible via a poorly maintained unsurfaced road and is the least accessible among the region's archaeological sites.

Location

Hoko Woreda, Eastern Sidama Zone.

T03 - Banko Marikos Megalithic Site

Type

Archaeological/Megalithic site

Description

Banko Marikos Megalithic Site is an ancient burial ground with over 30 phallic and cylindrical steles, some reaching up to 3.5 meters in height. Scattered across farmland and village compounds, the site is believed to have been a large cemetery, now partially affected by settlement and agricultural expansion. Traditionally, the steles are linked to the legendary Sidama figure Dingama Koyyo. While many have fallen or eroded, a few remain standing thanks to community care. The site lacks facilities, receives no tourism, and requires conservation.

Accessibility

The site is accessible via a secondary road in good condition, with a mix of tarred and unsurfaced sections.

Location

Dara Woreda, Southern Sidama Zone.

T04 - Homacho Waeno Megalithic Site

Type

Archaeological site/Megalithic site

Description

Homacho Waeno is one of the largest megalithic sites in the region, featuring over 30 standing and fallen steles, many with phallic features symbolising social status and fertility. Carved from single stone blocks, some steles reach up to 4 meters in height. The site likely served as a burial ground for a prominent community. Today, it is unprotected and used for livestock grazing, with several steles broken, displaced, or repurposed. Most are located in open grazing land, with a few in farmers' compounds. The site lacks visitor facilities, is not currently frequented by tourists, and requires urgent conservation.

Accessibility

The site is accessible via a secondary road in good condition, with some unsurfaced sections.

Location

Aleta Wondo Woreda, Southern Sidama Zone.

T05 - Sodicha Megalithic Site

Type

Archaeological/Meghalithic site

Description

This megalithic site features a few scattered megaliths across at least two main locations. The first location contains two steles under a tree, one of which remains standing at over 2 meters in height. Unlike other megalithic sites in the region, these steles have a relatively flat shape, resembling those at the Tiya site. Other steles, located within farmlands, are fragmented and difficult to analyze. Given the scattered distribution and current state of preservation, archaeological investigation is needed to better understand their historical significance. These scattered steles are found in farming and grazing lands owned by the local farmers. It is currently not visited by tourists and has low facilities.

Accessibility

The site is accessible via an unsurfaced road in good condition, with an easy footpath.

Location

Burra Woreda, Eastern Sidama Zone.

T06 - Shabe Dela Megalithic site

Type

Archaeological/Megalithic site

Description

Shabe Dela Megalithic contains more than 30 megaliths, likely marking a collective cemetery. However, the site has been significantly impacted by development—one section now lies within a recently constructed mosque compound, while the other remains a communal grazing area. The steles exhibit both phallic and elongated round shapes, similar to those found at other regional megalithic sites. Most of the steles are now broken or missing due to construction activities and unauthorized removal. Reports indicate that some were repurposed as building materials for the mosque. Immediate intervention is required to prevent further destruction of this heritage site. It is currently not visited by tourists and has low facilities.

Accessibility

The site is accessible via a secondary road, though the access road is in poor condition.

Location

Dara Olticho Woreda, Southern Sidama Zone.

T07 - Chuko Futahe Megalithic Site

Type

Archaeological/Megalithic site

Description

This stelae site contains over 26 megaliths distributed across two areas within a 100-meter radius. The steles, found in coffee plantations and farmland, exhibit phallic shapes, though less distinct than those at Banko Marikos or Homacho Waeno. Many of the megaliths have fallen, some broken and others covered by soil mainly due to ongoing agricultural activities, hence, immediate protection activity is needed. The site lacks visitor facilities and is not currently frequented by tourists.

Accessibility

The site is directly accessible from a primary road.

Location

Aleta Chuko Woreda, Southern Sidama Zone.

T08 - Arbegona Garamba Bamboo House Village

Type

Architecture/Vernacular, traditional

Description

Located near Garamba Mountain, this village showcases traditional Sidama bamboo houses, known as *sheeka*, which are constructed entirely from bamboo. The village itself is surrounded by dense bamboo forests and the structure of bamboo houses is typically circular or oval, with a conical roof. The round shape of the house reflects the Sidama's cultural values, such as indigenous wisdom in architecture, unity, harmony, and solidarity. The space is typically divided into three areas: the kitchen, the family sleeping room, and the cattle resting area. This site has limited facilities, but is currently visited by tourists.

Accessibility

The site is accessible via a secondary road in good condition, with an easy footpath.

Location

Arbegona Woreda, Central Sidama Zone.

T09 - Sidama Cultural Hall

Type

Architecture/Other historical

Description

The Sidama Cultural Hall was built in 1970s through financial contributions from the local community. It plays a key role in preserving, promoting, and showcasing Sidama traditions, artistic expressions, and historical narratives. The hall features a large ballroom that hosts a variety of events, including traditional music and dance performances, art exhibitions, concerts, cultural festivals, and workshops. It is also home to the Sidama Museum, which houses a small collection of artifacts that highlight the history, social customs and political struggles of the Sidama people. The museum's exhibits include traditional clothing, crafts, war tools, agricultural implements, jewelry and pottery, all of which provide insights into the daily life and artistic heritage of the region. However, the museum lacks proper interpretation and facilities need improvement.

Accessibility

The site is directly accessible from a primary road.

Location

Hawassa City Administration.

T10 - Wolde Amanuel Dubale Memorial Monument

Type

Architecture/Other historical

Description

The Wolde Amanuel Dubale Memorial Monument stands as a significant historical landmark, commemorating the life and contributions of Wolde Amanuel Dubale, a key figure in the Sidama people's fight against socio-political injustices. As a leader of the Sidama Liberation Front in the 1960s, Dubale played an instrumental role in mobilizing resistance against the feudal system and later the oppressive Derg regime, culminating in the regional state autonomy through a referendum. The monument serves as a lasting tribute to the resilience and perseverance of the Sidama people in their quest for justice, equality, and self-governance. Engraved with inscriptions and symbolic representations of Sidama's historical movements, the site is visited by locals, historians and tourists, as well as from younger generation for educational purposes.

AccessibilityThe site is directly accessible from a primary road.

Location

Hawassa City Administration.

T11 - Furra Institute of Development Studies

Type

Architecture/Other historical

Description

The Furra Institute of Development Studies is a historically and culturally significant institution, named after Queen Furra, a legendary figure of the Sidama people. It is located on the former administrative office of General Bazalrw, who governed Sidama during the Italian occupation (1936–1941). During this period, Italy recognized Sidama's language, culture, and governance structures, leading to a temporary era of cooperation between Sidama leaders and the colonial administration. The Furra Institute is now a vital academic and cultural hub, serving as a centre for promoting Sidama heritage, culinary traditions, sustainable development and cultural preservation. It also play a crucial role in cultural tourism by providing accommodation, educational programs and research opportunities related to Sidama's social and economic development.

Accessibility

The site is directly accessible from a primary road.

Location

Yirgalem City Administration, Central Sidama Zone.

T12 - Hawassa City Center Monument

Type

Architecture/Other historical

Description

The Hawassa City Center Monument, also known as Sidamu Sumuda, is an iconic structure symbolizing the unity and cultural identity of the Sidama people. Designed in the shape of a cylindrical tower, the monument's top section represents the inflorescence of the ensete (false banana tree). The monument was erected to celebrate the deep-rooted connection between the Sidama people and their ensete-based agricultural traditions. Strategically located at a major intersection in Hawassa, the monument serves as both a landmark and a gathering place for public events and cultural celebrations. The monument gets visited by many local tourists.

Accessibility

The site is directly accessible from a primary road.

Location

Hawassa City Administration.

T13 - Hawassa University Museum and Sidama Study Center

Type

Museum

Description

The Hawassa University Museum and Sidama Study Center is a prestigious institution established to collect, document and promote cultural heritage, making it a valuable resource for scholars and students The museum houses a diverse collection of artifacts, including: traditional clothing and jewelry; historical agricultural tools used in ensete and coffee farming; war artifacts from significant battles; pottery, blacksmithing tools, and household items reflecting traditional craftsmanship; Sidama currency and trade materials that showcase the region's economic history. The centre is actively involved in eco-tourism research, providing insights into sustainable tourism models and environmental conservation in the region. The site receives daily visits from both tourists and researchers.

Accessibility

The site is directly accessible from a primary road.

Location

Hawassa city Administration.

T14 - Shabadino Musuem

Type

Museum

Description

Located in Leke town, about 24 km from Hawassa city, the Shabadino Museum serves as a guardian of Sidama's rich history, traditions, and identity, preserving artifacts that provide valuable insights into the community's way of life. Exhibits include: traditional Sidama dress such as *Seema*, *Gonfa*, *Qolo*, *Qonxolo*, *Hiito*, and other textiles; jewelry, war tools, and agricultural implements showcasing historical craftsmanship; handcrafted wooden artifacts and pottery; household tools and cooking implements used in traditional Sidama homes. The museum offers a well-protected and curated space, ensuring the conservation of historical assets. It is designed to educate visitors, researchers, and students about Sidama's deep-rooted cultural traditions, it has good facilities for tourists. The site is currently visited by many local tourists.

Accessibility

The site is directly accessible from a primary road and includes an easy footpath for visitors.

Location

Shabadino Woreda, Northern Sidama Zone.

T15 - Wondo Genet Palace

Type

Architecture/Palace

Description

The Wondo Genet Palace was built in 1964 under Emperor Haile Selassie I. It is under the administration of the National Palace Authority and showcases political and cultural artifacts from the imperial era. Notable collections inside the palace include: gifts from international leaders, including those from Turkey, Japan, Austria, and the African Union; personal belongings of Princess Tenagne, including gold caps, traditional clothing, and household items; official documents, manuscripts, and historical letters related to Sidama's governance; church artifacts and royal memorabilia. The palace's architectural elegance, surrounding forests, and breathtaking biodiversity make it a unique tourist attraction. The site is well-maintained, with conserved walls and protected structures. It includes tourism facilities and it is currently visited.

Accessibility

The site is directly accessible from a secondary road with an easy footpath leading to the entrance.

Location

Wondo Genet Woreda, Northern Sidama Zone

T16 - Qacha Traditional Settlements

Type

Architecture/ Old town and village

Description

The Qacha Traditional Settlements are a living representation of Sidama's rural lifestyle, located 15 km from Yaye town with a panoramic view from Garamba Mountain. The settlements reflect ancestral land traditions, where extended families live together, maintaining strong social bonds and practising sustainable farming. Visitors can experience: clusters of ensete- and bamboo-covered homes; Sidama's traditional community living and social structures; a scenic green landscape and unique architectural patterns. The settlements remain well-preserved, providing insight into Sidama's indigenous knowledge systems and ecological harmony. The site has relatively good facilities and it gets visited by people visiting Garamba.

Accessibility

The village is easily accessible once visitors reach Garamba Mountain, with a direct secondary road and an easy footpath.

Location

Arbegona Woreda, Central Sidama Zone.

T17 – Arada Strategic Site

Type

Architecture/Vernacular, traditional

Description

The Arada Strategic Site is a historical landmark in Sidama, known for its role during the Italian occupation in 1935 when Ras Desta Damtew, governor of Sidama province, used the area's dense forests and caves as a strategic hiding place for nearly a year. Since 2003, the site has become a prominent tourist destination following the construction of Aregash Lodge by Gregorg Missalides. Built in traditional Sidama bamboo house style, the lodge offers quality accommodation, authentic food services, and a peaceful setting across 11 acres of well-maintained gardens and indigenous forest. The area's natural beauty, biodiversity, and cultural authenticity make it one of the most attractive tourism destinations in Yirgalem Town. The site is included on the SCTSB website and it is currently visited by both domestic and international tourists.

Accessibility

The site is directly accessible from a secondary road.

Location

Yirgalem City Administration, Central Sidama Zone.

T18 - Logita Lodge

Type

Architecture/Vernaculuar, traditional

Description

Logita Lodge is situated near the Logita falls, an area renowned for its rich green ecology, dense forests, and the dramatic convergence of two rivers. The name "Logita" corresponds to different regional names for the same river system, known as Ganale in Ethiopia and Jubba in Somalia, which is one of the largest and longest river systems in the Horn of Africa. Surrounded by traditional farmlands where coffee, ensete and khat are cultivated, the lodge offers visitors a unique opportunity to engage with local farming communities and witness traditional agricultural practices. It is designed to reflect Sidama's vernacular architecture, incorporating bamboo cultural houses that blend seamlessly with the natural landscape. Nearby, the Worancha village, home to Philadelphia Protestant Missionaries since the 1920s, provides an additional cultural point of interest. It is included on the SCTSB website as part of the water falls route.

Accessibility

The site is directly accessible from a primary road.

Location

Bona Zuria Woreda, Eastern Sidama Zone.

T19 - Old Logita (Ganale) Bridge

Type

Architecture/Bridge

Description

The Old Logita Bridge, also known as the Ganale Bridge, is a historical infrastructure project built in 1937 by the Italian colonial administration. It was constructed as part of an effort to strengthen control over Sidama by connecting the eastern highlands with strategic roads. The bridge was built using heavy metals but lacks modern concrete reinforcements. Despite its historical and engineering significance, the bridge has not received sufficient attention from local tourism authorities. However, it remains a notable landmark, frequently visited by locals who recognize its historical importance. The site is commonly visited by local tourists.

Accessibility

The site is directly accessible from a primary road.

Location

Bona Zuria Woreda, Eastern Sidama Zone.

Figure 14 : Chuko Futahe Megalithic Site

5.4 Intangible cultural heritage

The **Sidama people** belong to the Eastern Highland Cushitic linguistic group and have historically maintained a distinct cultural and political identity. The origins of Sidama are traced to two ancestral lineages: *Bushee* and *Maldea*, which formed the basis of clan structures. These clans, while distinct, share common linguistic and cultural practices, fostering a strong communal identity. The Sidama political system was historically governed by the *Moote*, an egalitarian democratic institution based on customary laws, ethical codes, and decision-making through councils of elders[54]. This governance system played a crucial role in maintaining social harmony and conflict resolution. The Sidama struggled for self-determination throughout the 20th century[55], and the establishment of the Sidama Regional State marked the culmination of a long political journey and reinforced the preservation of its cultural heritage.

The **oral traditions** of the Sidama people serve as a primary means of transmitting cultural knowledge, values, and historical narratives. Elders play a pivotal role in preserving these traditions, passing down myths, legends, genealogies, and ethical teachings through storytelling and communal gatherings[56]. Folktales and proverbs reflect the community's world view and provide moral instruction.

Music and dance feature prominently in communal celebrations and rituals. The Sidama cultural dance, *Ketala*, is performed during major festivities, including the Fichee Chambalaalla, the Sidama New Year festival. Accompanied by traditional instruments such as the Kirar (lyre) and drums, the dance expresses communal unity, social hierarchy, and historical memory. **Fichee Chambalaalla** is indeed one of the most significant intangible cultural assets of Sidama and recognised by UNESCO as an Intangible Cultural Heritage of Humanity. This New Year festival is rooted in Sidama's indigenous calendar system, determined by traditional astrologers known as **Ayanto**. The festival is a time of renewal, community bonding, and the transmission of cultural values. It features ritual gatherings, feasting, and performances, with elders playing a key role in officiating ceremonies. Unlike the Gregorian calendar, the festival date is not fixed but determined by lunar observations[57].

Another key cultural institution is the *Songo*, a council of elders responsible for social governance and conflict resolution. The Songo plays an essential role in upholding customary laws, mediating disputes, and making collective decisions on behalf of the community. The principles of *Seera* (customary law) and *Affini* (communal reconciliation) remain central to maintaining harmony and social cohesion[58].

Agricultural traditions form an essential part of Sidama's intangible cultural heritage. The ensete is at the core of Sidama's food system, providing a staple known as Kocho. The knowledge of cultivating, processing, and storing ensete has been passed down for generations. Additionally, Sidama coffee cultivation is renowned for its high-quality production, with traditional methods of harvesting and processing playing a crucial role in preserving its authenticity. Sidama communities also possess extensive indigenous knowledge in medicine, environmental conservation, and astrology. Traditional healers utilize herbal medicine derived from local plants, while spiritual leaders provide guidance based on celestial interpretations. The integration of traditional ecological knowledge ensures the sustainable use of natural resources and reinforces the region's resilience to environmental changes.

Handcraft production is an important element of Sidama's intangible cultural heritage, showcasing the creativity and craftsmanship of local artisans. Traditional weaving, pottery, and basketry are deeply embedded in the region's cultural identity. The production of Sidama's distinctive woven textiles, often adorned with vibrant geometric patterns, is primarily undertaken by women, using locally sourced cotton. Basketry, crafted from natural fibres, serves both utilitarian and decorative purposes, with intricately designed baskets used in daily household activities and ceremonial occasions. Pottery, another significant craft, is traditionally shaped by hand and fired using indigenous techniques, resulting in unique clay vessels for cooking and storage.

Intangible cultural heritage

Legend

- Astronomy
- Creative industries
- Cultural festival and event
- Handcraft community
- Social organisation and value
- Food and drink
- Christian pilgrimage and festivity
- Farming

- Main paved road
- Unpaved road
- Built up area
- Water body
- Regional boundary

N

0 10 20 km

Source: expert analyses and research

I01 - Fichee Chambalaalla Celebration
I02 - Saint Gabriel Annual Festival
I03 - Hawassa Fish Market
I04 - Wolima Budu Gaamo
I09 - Dila Afrara Handcraft Village
I16 - Teelamo Indigenous Leadership and Astrolog's Site
I12 - Sidama Mootete Songo
I12 - Sidama Mootete Songo
I08 - Aposito Handcrafts Village
I07 - Garamba Ensete Culture Village
I06 - Hanaafa Ensete Culture Village
I05 - Aabbo Wonsho Cultural Place
I14 - Sidama Ayanto (Local Astrologists)
I15 - Gole Traditional Leadership, Songo, and Astrology
I01 - Fichee Chambalaalla Celebration
I13 - Qawa-Qiqe Songo Tradition
I10 - Fachena village
I11 - Shisho Songo Place

Shashamane
Hawassa
Kofele
Kore
Bodeo
Ameda
Shone
Dendo
Worqicha
Dore
Kela
Wondo
Genet
Chuko
Ashoka
Velag
Wabe
Edo
Bitena
Galcha
Kercheche
Anka
Oruwa
Dimtu
Bedesa
Balela
Yirba
Tula
Lida
Manicho
Lako
Gorche
Darara
Aposito
Yirgalem
Bokaso
Woncho
Hantate
Arbe
Gona
Yaye
Burra
Werka
Hafte
Bergene
Aleta
Wondo
Chuko
Bursa
Teticha
Bona
Daye
Daela
Chire
Nancebo
Kewado
Teferi-kela
Hageresela
Chirone
Chabe
Majo
Girja
Dilla
Bore
Haranfema
Fiseha
Genet
Solemo
Bocco

I01 - Fichee Chambalaalla Festival

Type

Cultural festival and event

Description

Fichee Chambalaalla is the Sidama New Year festival, celebrated for centuries and officially recognized by UNESCO as Intangible Cultural Heritage in 2014. The festival is deeply rooted in Sidama cultural identity and features the *ketala* dances performed by elders, youths, and women in traditional attire, making it a major attraction for both local and international visitors. The festival's date is determined by the *Ayanto* (local astrologers) based on their observations of *Bakkalcho* (the largest star nearest to the Moon) and other celestial bodies at specific times of the night. The festival also serves as a time for families, friends and communities to come together, reinforcing social ties and cultural values. The most known locations for celebrating are the Great Gudumale, the Malga Wotara Gudumale and the Arbegona Yaye Gudumale. It is included on the SCTSB website and visited by many international tourists every year.

Accessibility

The Great Gudumale is directly accessible from secondary road, with a tarred access road in good condition.

Location

Hawassa city administration; Malga Woreda, Northern Sidama Zone; Arbegona Woreda, Central Sidama Zone.

I02 - Saint Gabriel Annual Festival

Type

Christian pilgrimage and festivity

Description

Saint Gabriel Church hosts its annual festival twice a year, in December and July, attracting thousands of believers, pilgrims, and visitors from Ethiopia and beyond. The festival is a major religious event for Ethiopian Orthodox Tewahedo Christians, characterized by Yaredaw-style worship, traditional chants, and colorful cultural attire. The spiritual activities, combined with the grandeur of the church and its peaceful surroundings, make the event a significant cultural and religious experience. The festival provides a unique opportunity for visitors to witness Ethiopia's rich Orthodox Christian traditions and vibrant religious expressions. The site has adequate facilities for visitors.

Accessibility

The site is directly accessible from a primary road.

Location

Hawassa City Administration.

I03 - Hawassa Fish Market

Type

Food and drink

Description

The Hawassa Fish Market is a prominent cultural landmark that attracts numerous visitors each year. Established in the 1970s, following the founding of Hawassa in the 1960s as the economic and political capital of the Sidama Province, the market plays a crucial role in the local economy and food supply. It t is a lively hub where fishermen and traders engage in daily commerce, offering visitors a glimpse into traditional fishing practices and the bustling trade of fresh fish. Visitors are drawn to the site to observe local fishing boats, experience the preparation of traditional fish dishes such as Asa Filito (raw fish dish), observe the symbiotic relationship between fishermen and marabou stork. The site is included on the SCTSB website and it includes facilities for visitors that could be improved.

Accessibility

The site is directly accessible from a primary road.

Location

Hawassa City Administration.

I04 - Wolima Budu Gaamo

Type

Creative industries

Description

Wolima Budu Gaamo was a renowned group of Sidama heroes in the 1960s, who used music to mobilise the community in the armed struggle against the feudal system and the Derg regime. After 1995, the group was restructured under the SCTSB. Today, it plays a key role in the development of both traditional and modern Sidama music, uniting talented artists and performers. Wolima continues to preserve and promote Sidama music, dance, and artistic expression. The term "Wolima" is rooted in traditional performance and aesthetics, and the group's vibrant shows remain central to major festivals and public events, with their legacy also showcased in the Sidama Cultural Hall (see section 5.3 for Sidama Cultual Hall description).

Accessibility

--

Location

Hawassa City Administration.

I05 - Aabbo Wonsho Cultural Place

Type

Social organisation and value

Description

Aabbo Wonsho is a sacred cultural and spiritual centre that embodies the indigenous leadership institution of the Sidama people. The site dates back to the 16th century and was established on the tomb of the ancestral father of the *Holoo* clan during a period of Sidama political and social unification. Historically, it served as a major site for religious rituals, traditional governance, and conflict resolution. It remains a key place for *Daasho* (sacrificial rituals) and *Songo* (traditional elder councils), which continue to hold social, political, and spiritual significance for the Sidama people. As a preserved indigenous cultural site, Aabbo Wonsho provides insights into the moral philosophy and traditional justice system that have guided the Sidama community for generations. The site is included on the SCTSB website and it is frequently visited by researches, local and international tourists.

Accessibility

The site is accessible via an unsurfaced secondary road in good condition.

Location

Wonsho Woreda, Central Sidama Zone.

I06 - Hanaafa Ensete Culture Village

Type

Farming

Description

The Hanaafa Ensete Culture Village is a community-based tourism site established in collaboration with the SCTSB, along with key stakeholders. It serves as a centre for promoting the ensete culture, which is the staple food source for the Sidama people. Approximately 90% of the Sidama population relies on ensete for food security. Visitors to the village can observe traditional ensete processing methods, particularly the preparation of kocho, a fermented food derived from the plant. The village also offers additional activities such as traditional coffee ceremonies, birdwatching and trekking programs ranging from one to four hours. The surrounding landscape includes dense forests and natural hot and cold springs. The site is included on the SCTSB website and it is visited mostly by international visitors.

Accessibility

The site is accessible via an easy footpath. It is located near Aregash Lodge, approximately a 13-minute walk from the main access road.

Location

Yirgalem Town, Central Sidama Zone.

I07 - Garamba Ensete Culture Village

Type

Farming

Description

The Garamba Ensete Culture Village is located approximately 15 km from Yaye town, near Garamba Mountain, an area characterized by traditional bamboo houses and Qacha settlement villages. In this village, the ensete cultivation and processing practices illustrate the deep-rooted agricultural traditions of the Sidama people. Traditional food products derived from ensete include *kocho* (fermented flatbread), *bu'lla* (starch-based food), and *omolcho* (a porridge-like dish), all of which are integral to the community's diet and cultural identity. Beyond its role in nutrition, ensete is a symbol of resilience and sustainability, deeply intertwined with the ecological preservation and social customs of the Sidama people.

Accessibility

The site is accessible via a secondary road in good condition, with an easy footpath leading to the village.

Location

Arbegona Woreda, Central Sidama Zone.

I08 - Aposito Handcrafts Village

Type

Craft/handcraft and traditional practice

Description

Aposito Handcrafts Village is one of the most renowned centres for Sidama artisans, preserving traditional craftsmanship that has been passed down for generations. Historically, blacksmiths and potters were marginalized groups within Sidama society, but their contributions have played a crucial role in the region's socio-economic development and cultural identity. The village serves as a hub where various artisans create and display their work, including *mesobs* (woven baskets), *dantiles* (ceremonial items), handcrafted caps, bamboo products, and other traditional artifacts. The sale of these products supports local livelihoods and contributes to the preservation of traditional skills, making Aposito Handcrafts Village an important cultural tourism site, mostly visited by local tourists.

Accessibility

The site is direct accessible from a primary road.

Location

Dale Woreda, Central Sidama Zone.

I09 - Dila Afrara Handcraft Village

Type

Craft/handcraft and traditional practice

Description

Dila Afrara Handcraft Village, located 20 km from Hawassa city, represents one of the most important craft production centres of the region, particularly known for its traditional pottery. Pottery production in Sidama is a hereditary skill, passed down through generations, with the *Hadicho* clan historically playing a dominant role in its preservation. The artisans, mostly women, create a diverse range of ceramic products, including cooking pots, water storage containers, drinking vessels, and decorative pieces. These items are made from locally sourced clay, carefully shaped by hand, fired in traditional kilns and adorned with intricate designs that reflect the artistic heritage of the Sidama people. The village offers visitors an immersive experience, allowing them to witness the entire pottery-making process, from clay collection to the finished product.

Accessibility

The site is directly accessible from a primary road and is in good condition.

Location

Shabadino Woreda, Northern Sidama Zone.

I10 – Fachena Village

Type

Craft/handcraft and traditional practice

Description

The Fachena Village is a village where traditional instruments and tools are produced by the indigenous community.

Accessibility

Accessible from unsurfaced secondary road, the secondary road is being upgraded to a surfaced road that connects the area to Bale mountains.

Location

Chiree Woreda, Eastern Sidama Zone.

I11 - Shisho Songo Place

Type

Social Organisation and Value

Description

Shisho Songo is a significant cultural and leadership institution, serving as the judicial and decision-making centre for the Haadicho clans, where disputes are resolved through traditional *Songo* assemblies. The Geelo, or chief judge, presides over cases, supported by other clan leaders known as *Cimmeyye*. The Songo discussions strictly adhere to the democratic principles of fairness, freedom, and justice, fostering social cohesion within the community. Historically, the Shisho Songo has played a central role in Sidama governance since the 16th century, ensuring that indigenous laws and customs continue to guide societal norms. Visitors and researchers interested in traditional justice systems find this site an excellent resource for understanding the Sidama people's approach to legal and political affairs.

Accessibility

The site is accessible via a primary road in good condition, with an easy footpath leading to the centre.

Location

Darra Woreda, Qawado town, Southern Sidama Zone.

I12 - Sidama Mootete Songo

Type

Social organisation and value

Description

Since the 9th century, the Sidama indigenous leadership was based on the *Moote* and *Songo* systems. The *Moote* serves as the head of the community, playing a role similar to that of a king or a respected chief. Governance is carried out through the *Songo*, a general assembly of elders, which serves as the decision-making body and deliberates on social, economic, and political matters. The General Assembly of the Council of Elders holds its meetings at the Great Gudumale. An additional component of Sidama leadership is the *Affini* system, a traditional mechanism for conflict resolution and consensus-building. Even today, elements of the *Moote*, *Songo*, and *Affini* traditions remain relevant, highlighting the resilience and continuity of Sidama's indigenous governance system.

Accessibility

The site is directly accessible from a primary road.

Location

Hawassa City Administration.

I13 - Qawa-Qiqe Songo Tradition

Type

Social Organisation and Value

Description

Qawa-Qiqe is a sacred *Songo* site that serves as the social, cultural, and spiritual centre for the *Kebena* clans in Eastern Sidama. The site dates back to the 13th century when the ancestors of the *Kebena* clans, *Mahe* and *Adanye*, settled near the Logita River. The *Songo* assemblies held at Qawa-Qiqe play a vital role in preserving traditional leadership structures, resolving conflicts, administering justice, and conducting significant communal rituals such as honey blessings and ancestral veneration. The site is also deeply connected to Sidama astronomy, as elders use celestial observations to determine the timing of festivals, including the Fichee Chambalaalla New Year celebration. The conservation of this site ensures the continued practice of these age-old traditions. The site is visited by many local tourists.

Accessibility

The site is accessible via a secondary road in good condition, with an easy footpath leading to the site.

Location

Bura Woreda, Eastern Sidama Zone.

I14 - Sidama Ayanto (Local Astrologists)

Type

Astronomy

Description

The *Ayanto* are highly respected elders in Sidama society who possess deep knowledge of celestial movements and traditional astronomy. They play a significant role in observing and interpreting the positions of stars and the moon, using this wisdom to determine important events such as the Fichee Chambalaalla festival and agricultural cycles. Unlike formal education, their expertise is derived from generations of accumulated experience and an intrinsic connection with nature. Their astrological insights continue to guide Sidama cultural and spiritual practices, preserving an ancient tradition that remains relevant to the community. Telamo, Garamba and Qawa Qiqe are considered to be the most suitable sites for stargazing and have been visited by tourists.

Accessibility

The site is accessible via a tarred road in good condition, with an easy footpath leading to the sites.

Location

Shabadino, Arbegona and Burra Woredas; Northern, Central and Eastern Sidama Zones.

I15 - Gole Traditional Leadership, Songo, and Astrology site

Type

Astronomy /Social Organisation and Value

Description

The Gole site serves as a centre for traditional Sidama leadership, *Songo* (assembly of elders), and indigenous astronomy. This place is associated with the *Yemerero* clans and has been a focal point for leadership decisions, conflict resolution, and religious rituals since the early 16th century. The *Moote* (leader) holds authority in managing community affairs, ensuring justice, and maintaining cultural values. Elders at the site are also known for their deep understanding of astronomy, using celestial observations to determine significant cultural events, such as the Fichee Chambalaalla festival. Weekly rituals and ancestral worship further solidify the Gole site's importance as a spiritual and governance hub. The site is visited by local tourists.

Accessibility

The site is accessible via a secondary road in good condition.

Location

Arbegona Woreda, Central Sidama Zone.

I16 - Teelamo Indigenous Leadership and Astrology Site

Type

Astronomy /Social Organisation and Value

Description

Teelamo is one of the most respected sacred sites in northern Sidama. This site dates back to the 10th century and is linked to the tomb of Fakisa-Tumano, an ancestral leader of major Sidama clans. The site serves as a gathering place for clan representatives to resolve disputes, enforce customary laws, and conduct indigenous justice processes. The area is surrounded by large, dense indigenous trees, adding to its spiritual and ecological significance. Teelamo is also an important centre for astrology, where elders use star observations to determine significant cultural and spiritual events, including auspicious days for marriage and religious practices. The site is well-maintained, making it both a cultural heritage and eco-tourism attraction. The site is currently visited by tourists.

Accessibility

The site is accessible via a secondary road in good condition, with an easy footpath leading to the centre.

Location

Shabadino Woreda, Northern Sidama Zone.

6. Environmental and social context

6.1 Nature conservation in Sidama

Regional Environmental Authorities are tasked with implementing conservation strategies, monitoring environmental standards, and ensuring alignment with federal policies within their respective regions[59]. The Ethiopian Environmental Protection Authority (EPA) is the current federal institution responsible for environmental management. The EPA collaborates with sectoral bodies and regional environmental authorities to ensure coordination and effective management.

Ethiopia's protected area system encompasses National Parks, Wildlife Reserves, Sanctuaries, Forest Priority Areas, and Controlled Hunting Areas. Additionally, Community Conservation Areas, which are regionally managed, fall under the International Union for the Conservation of Nature definition of protected areas with legal status. Unlike traditional protected areas, Community Conservation Areas exist on community-owned land, where local communities engage in sustainable farming and resource use while maintaining conservation objectives.

The **Ethiopian Wildlife Conservation Authority (EWCA),** a federal branch of the Ministry of Tourism established in 2008, is primarily responsible for managing protected areas across Ethiopia. The country has also designated Forest Priority Areas, which may be administered by regional governments or private enterprises.

Protected area management in Sidama operates under two distinct systems: one managed by the EWCA and the other under the SCTSB, in collaboration with the Sidama Bureau of Environment Protection, Forest, and Climate Change. This dual management approach ensures the conservation of Sidama's natural heritage while balancing community involvement and ecological sustainability.

The region is also home to two Important Bird Areas (IBAs), which are sites identified by BirdLife International[60] as critical for the conservation of bird populations globally.

Loka Abaya National Park. Managed by the SCTSB, this is the only National Park of the region, extending north of the Lake Abaya and covering about 50,000 ha. The main attraction of the park is the view of the lake and the riverine forests. By the park headquarters there is an area where visitors can camp at temporary campsites. The park is characterised by a heterogeneous and hilly soil, including flat lands and rolling plains, rivers, valleys and gorges[61]. The majority of the park is covered with grassland, while the lake takes only about 8% of the area and forest 29%. The elevation range goes from 1175 to 1700 m asl. The park faces challenges such as illegal settlements, poaching and drought.



Senkelle Swayne's Hartebeest Sanctuary and IBA. Managed by EWCA, (located in the inter-boundary regions of Sidama and Oromia), it covers approximately 5400 ha. This sanctuary has been established to conserve the threatened Swayne's hartebeest antelope endemic subspecies[62]. However, conservation efforts in Senkelle face challenges such as human-wildlife conflict, where local communities experience crop raiding by wildlife and livestock predation by carnivores like hyenas and African wolves. Despite these challenges, the sanctuary remains a critical site for the protection of this unique antelope species and is recognized as an IBA due to its diverse avian population, with 191 bird species[63]. The sanctuary supports local communities by allowing grass cutting for livestock. It operates under a structured management plan with an allocated budget, personnel, and rangers dedicated to wildlife conservation. However, tourism facilities have yet to be developed within the sanctuary[64].

Garamba Mountain Community Conservation Area. Managed by the SCTSB, it is located in Arbegona Woreda, approximately 67 km from Hawassa, with a travel time of about 2 hours and 10 minutes. Mount Garamba, the highest peak in Sidama at 3232 meters asl, is a significant natural landmark. The area attracts a growing number of visitors each year but still lacks proper tourism infrastructure and faces challenges with low community engagement. Local communities have historically not benefited from conservation efforts, leading to illegal activities such as unauthorized settlements, agricultural expansion, tree cutting for firewood, livestock overgrazing, hunting, and encroachment. Additionally, the lack of a reliable mobile network further limits accessibility and communication within the area. To address these challenges, a new conservation plan is being developed, aiming to enhance community involvement by creating opportunities for local tour guides, traditional food services, horse rentals, cultural dressmaking, and bamboo handcraft sales. The plan also includes the development of tourist lodges, camping sites, and visitor information centers to support sustainable tourism. Furthermore, Garamba Mountain has been identified as one of the best locations in the region for stargazing, adding to its tourism potential[65][66].

Hawassa IBA. Lake Hawassa is an IBA supporting a diverse range of avian species. It is the smallest of the seven natural lakes in the Rift Valley and is located at 1680 m asl, bordering the eastern side of Hawassa city. Approximately 60 bird species have been recorded along the lake's shoreline and surrounding woodlands[67]. The lake also serves as a crucial feeding and breeding ground for migratory birds, highlighting its ecological significance throughout different seasons. In addition to its birdlife, Lake Hawassa is home to several mammal species, including colobus monkeys, olive baboons, grivet monkeys, and hippopotamuses. It is considered one of the best places in Ethiopia to observe hippos in their natural habitat.

Sidama is also partly touched by three proposed protected areas namely the Munesa-Shashemene National Forest Priority Area to the north-east; the Harena-Kokosa National Forest Priority Area to the east, and the Bore-Anferara National Forest Priority Area to the south.

Figure 15 (previous page – left): Loke Abaya

Figure 16 (previous page – right): Marabou stork family at Hawassa Fish market

Durame
Bode Ameda
Shashamane
Qoree
Senkelle Swayne's Hartebeest Sanctuary and IBA
Shone
Dendo
Lake Hawassa and IBA
Cheleleka Wetlands
Hawassa
Kela
Wondo Genet
Chuko
Kefole
Arsi Mountains National Park
Ashoka Velag
Wabe
Edo
Asassa
Dore
Edo
Worqicha
Bitana
Galcha
Kercheche
Munesa-Shashemene National Forest Priority Area
Tula
Manicho
Yirba
Dimtu
Badeessa
Anka Oruwa
Lako
Gorche
Darara
Aposito
Yirgalem
Bokaso
Garamba Mountain Community Based Conservation Area
Kokosa
Hantate
Yaye
Boroda Lake
Hafte Bergene
Loka Abaya National Park
Aleta Wondo
Chuko
Bursa
Harena-Kokosa National Forest Priority Area
Werka
Teticha
Bona
Daye
Chire
Lake Abaya
Teferi-kela
Hagereselam
Nancebo
Kewado
Bore-Anferara National Forest Priority Area
Chabe
Dilla
Majo
Bore
Girja
Yiriga Cheffe

Nature conservation

Legend

- Designated protected areas
- Proposed protected areas
- Important Bird Area
- Main road
- Water body
- Built-up area
- Regional boundary

N

0 10 20 km

Source: World Database on Protected Areas
Birdlife Data Zone

6.2 Environmental issues

Deforestation and land degradation

Sidama's forests, covering approximately 25,427 ha of natural forest and 432,912 ha of plantation forest (see section 3.2), play a crucial role in regulating water flow, mitigating soil erosion and providing habitat for biodiversity. However, deforestation, primarily driven by agricultural expansion, fuelwood collection and population growth, continues at an alarming rate. Between 2000 and 2013, Ethiopia experienced a net deforestation rate of 72,000 hectares annually, and within Sidama alone, 12,961 hectares of forest have been degraded[68].

One of the most affected areas is Garamba Mountain Community Conservation Area, which faces significant environmental pressures. Illegal activities, including settlement expansion, agricultural activities, tree cutting, and hunting, are widespread, largely driven by poverty and a lack of awareness. Encroachment into the conservation area is a major issue, with land being cleared for cultivation and settlements, sometimes accompanied by the removal of conservation markers and signs. These activities, which intensify during the rainy and farming seasons, contribute to biodiversity loss and ecosystem destabilization[69].

Habitat loss and degradation

The conversion of forests and grasslands into farmlands, coupled with overgrazing and unregulated hunting, has led to significant biodiversity loss. The proliferation of invasive species further threatens native flora and fauna. Poor land management practices, such as farming on steep slopes without adequate soil conservation measures, exacerbate erosion and land degradation, affecting both agricultural productivity and ecosystem stability[70].

Climate change and variability

The Sidama Region's diverse climate is shaped by its topography and geography. Rainfall is bimodal, with the short *Badhessa* (March-May) and the long Hawado (June-October) as the main rainy seasons, providing most of the annual rainfall, which averages 1,244 mm but ranges from 800 mm in lowlands like Loka Abaya to 1,800 mm in highlands. The *Arro* season (November-February) is the driest period. Temperatures vary significantly, from 8°C in the highlands to 28°C in lowlands. Over the past three decades, maximum and minimum temperatures have risen by 0.4°C and 0.25°C per decade, respectively, driven by deforestation and land-use changes, especially in the south-east.

The long-term impacts of climate change present a significant challenge to the region. Shifting growing seasons, changes in rainfall patterns, and increased temperature variability are affecting Sidama's predominantly rain-fed agricultural system. Rainfall variability is a pressing concern, with extreme weather events such as droughts (notably in 1999, 2002, and 2012) and heavy rainfall leading to localized flooding (2016 and 2020). These changes threaten food security, biodiversity, and water availability, particularly in the lowland areas, which are more vulnerable to water scarcity and heat stress[71].

Water resource challenges

As of 2020, urban water access in Sidama was 58.5%, rural access 46%, and the regional average 52.25%. The main potable water sources include tap water, springs, boreholes, and wells, with government and NGOs working to improve infrastructure. Water quality is deteriorating due to land use changes, agricultural expansion and increased irrigation, reducing river base flow and raising mineral content. Despite many perennial rivers, water distribution is uneven, with highland areas having more surface water, while lowland regions face scarcity. Groundwater development in lowlands is limited by financial and technological constraints. Land-use changes accelerate erosion and reduce groundwater recharge, worsening dry-season shortages. Nutrient buildup in lakes, particularly near intensive farming areas, has led to eutrophication. Several woredas, including Boricha, Hawassa Zuriya, Bilate Zuriya, Darara, Loka Abaya, and Shebedino, experience severe water shortages. Water scarcity in Sidama is both physical due to natural shortages, and economic due to lack of infrastructure. Dependence on rainfall exacerbates food insecurity, health issues and vulnerability to drought. Insufficient clean water access also increases the risk of waterborne diseases, including food poisoning and cholera. Coffee processing is a major water pollutant, with wet processing plants often discharging wastewater into rivers due to inadequate disposal systems. Industrial pollution from manufacturing plants in Hawassa, along with mining and deforestation, has further degraded water quality, particularly in the lake, where high fluoride and sediment levels have been recorded[72].

Human-wildlife conflict

The coexistence of human settlements with protected areas has led to frequent human-wildlife conflicts, particularly in Senkelle Swayne's Hartebeest Sanctuary. Local communities experience significant losses from livestock predation by hyenas and African wolves, as well as crop raiding by Swayne's hartebeest, warthogs, and porcupines. Without sustainable solutions that address both conservation needs and local economic concerns, the survival of protected wildlife species remains at risk.

Governance and institutional challenges

Lack of coordination between federal and regional environmental authorities remains a barrier to effective environmental governance in Sidama. While the EPA oversees environmental policies at the national level, implementation gaps persist at the regional level. Protected areas are often not physically secured, and indigenous communities residing in or near these areas do not always benefit from conservation initiatives. A lack of financial resources, weak enforcement of environmental laws and limited public awareness further hinder conservation efforts. Protected areas, such as Loka Abaya National Park and Senkelle Swayne's Hartebeest Sanctuary, face ongoing threats from illegal resource extraction, encroachment, and limited management capacity. Many local communities depend on these areas for their livelihoods, leading to conflicts over land use and conservation goals. Invasive species and habitat degradation further threaten the ecological integrity of these areas.

Environmental sustainability of tourism facilities

The current national hotel grading[73] requirements include a sustainability assessment, but the criteria remain limited in scope and lack comprehensive environmental standards. While some measures address waste management, water conservation, and energy efficiency, key areas such as carbon footprint reduction and sustainable sourcing of materials are missing. Strengthening these standards by incorporating stricter sustainability benchmarks, monitoring mechanisms, and incentives for eco-friendly practices would enhance the hospitality sector's role in environmental conservation and sustainable tourism.

Figure 17: Land degradation in Udume Forest



6.3 Social issues

Poverty

Ethiopia is witnessing a rapid transformation of its urban landscape as a result of high levels of economic growth estimated at 7.2% in 2022/23, yet it also remains one of the poorest as a predominantly rural country. It's Human Development Index value in 2022 was 0.492 positioning it at 176 out of 193 countries.[74]

Similarly, Hawassa is one of the country's fastest growing cities and acts as an urban growth pole of the South-Eastern Rift urban cluster following internal migration and the growth of educational and other facilities.[75] However, approximately 90% of Sidama's population live in rural areas as subsistence farmers who experience higher levels of poverty than in the urban areas as illustrated here using proxy data for SNNPR.[76] In these rural areas cattle and land ownership are the main indicators of wealth, and livelihoods and food security are greatly affected by fluctuations in productivity, livestock disease and prices of export crops such as coffee.

Historically, Sidama people had not faced the same level of major hunger and famine experienced in other Ethiopian regions due to reliable rainfall and evergreen land providing them with relatively better food security. However, the growth in population, erratic rainfall, and reliance on traditional farming technologies is resulting in the region becoming increasingly vulnerable to experiencing drought, hunger, malnutrition and child deprivation[77].

Approximately 49.3% of SNNPR households surveyed in 2021/22 experienced moderate food insecurity and 9.1% households experienced severe food insecurity (an increase from 2019). Major shocks that negatively impacted households were, in order of impact, unusual rises in food prices, prices of inputs and draught. To cope with these major shocks, households mainly depleted savings or sold livestock. Tourism development can contribute positively here by offering additional rural livelihoods to reduce this level of dependency on agriculture.

Other indicators of poverty or quality of life for SNNPR are showing improvements such as access to electricity due to increasing solar penetration (particularly in rural areas) and slightly improved sanitation facilities although this remains an important issue to address.[78]

Human capital and resources

Sidama shares the national challenge of having significant gaps in the skills and training required for developing a professional tourism workforce, as highlighted in strategic policy documents.

This is the result of a combination of factors, in particular due to levels of basic education which, whilst improving, still face a number of issues affecting the capacity of the country's workforce. Literacy rates for SNNPR are 62% overall but this masks variations according to age, gender and rural versus urban populations. For example, in terms of the national average, literacy rates for rural areas are 54.5% versus 83.1% for urban areas.[79]

There is also limited provision of market-led, tourism-related training programmes at Technical and Vocational Educational Training and university levels. Furthermore, there is inadequate investment from employers in Continuous Professional Development; and limited access to the Internet in rural areas.

Building capacity in human capital and resources within the tourism sector is essential for the success of Sidama's industry. Attention will need to be paid not just to the number of jobs created but also to the quality of jobs and terms and conditions of employment as part of a sustainable approach.

Women and Youth Empowerment

In Sidama, as with the rest of Ethiopia, current gender gaps[80] show that challenges remain to realizing gender equality and inclusive growth, and addressing biased gender social norms which are a major contributing factor.[81] Data from SNNPR (2021/2022) survey helps identify some of these gender gaps for the region.

In terms of an education gap, the literacy rate for men aged 30+ is 61% versus 22.6% for women, compared to those aged 15-19 where the gap closes with 85.9% males and 80.5% females being literate.

Gaps exist in waged employment as 5.3% men are working for salary or wages versus 2.7% females (with an increasing number of females dropping out of wage employment at around age 30). However, it is important to interpret these figures in the wider context of Sidama where the major majority of employment is self-employment in the agricultural sector.

Women and girls also face an inequitable burden for collecting water and firewood with 59.2 minutes per day females participating in this activity compared to 26.4 for males; although it decreases for males aged 15-64. They are also adversely affected by poor access to neonatal and maternal healthcare in rural areas.

In terms of other aspects of inequality, they are also adversely affected by poor access to neonatal and maternal healthcare in rural areas, gender-based violence, female genital mutilation (62% of women aged 15-49 in SNNPR)[82] and child marriage, although the region has a comparatively (versus other regions) low rate among women aged 20 to 24 years with a median age at first marriage of 18.2 years.[83]

Action to support both gender and youth empowerment is happening at different levels in Sidama to address concerns such as early child marriage, child protection issues, gender-based violence and youth unemployment[84]. Projects focus on promoting educational, entrepreneurship and leadership opportunities, addressing time constraints for women and tackling gender norms. Key organisations on the ground include: Sidama Regional State Women's, Youth and Social Affairs Bureau; International NGOs such as UNICEF Ethiopia; Ethiopian Human Rights Commission; national youth and women associations; and regional local non-profits such as the SDA and the Sidama Community Association.

Gender mainstreaming and meaningful youth participation in tourism development in Sidama can be used to create opportunities for gender equality, youth empowerment and poverty reduction, as well as identify any potential social risks resulting from their involvement in the industry that need to be managed.

7. Strengths, weaknesses, opportunities and threats

Strengths, weaknesses, opportunities, and threats

The following SWOT analysis examines the strengths, weaknesses, opportunities, and threats related to Sidama's tourism sector. It considers both existing attractions and facilities, as well as assets with development potential. The analysis provides insights into the current status of tourism in the region, highlighting key factors that influence its growth and sustainability. The structured approach categorises elements into general marketing and institutional aspects, attractions, infrastructure and facilities, and other relevant considerations.

The SWOT analysis lays the foundation for the forthcoming Product Development Plan that will further build on the knowledge derived from the inventory and outline specific projects and actions aimed at transforming Sidama into a premier tourist destination, ensuring that tourism growth aligns with cultural preservation and environmental sustainability.

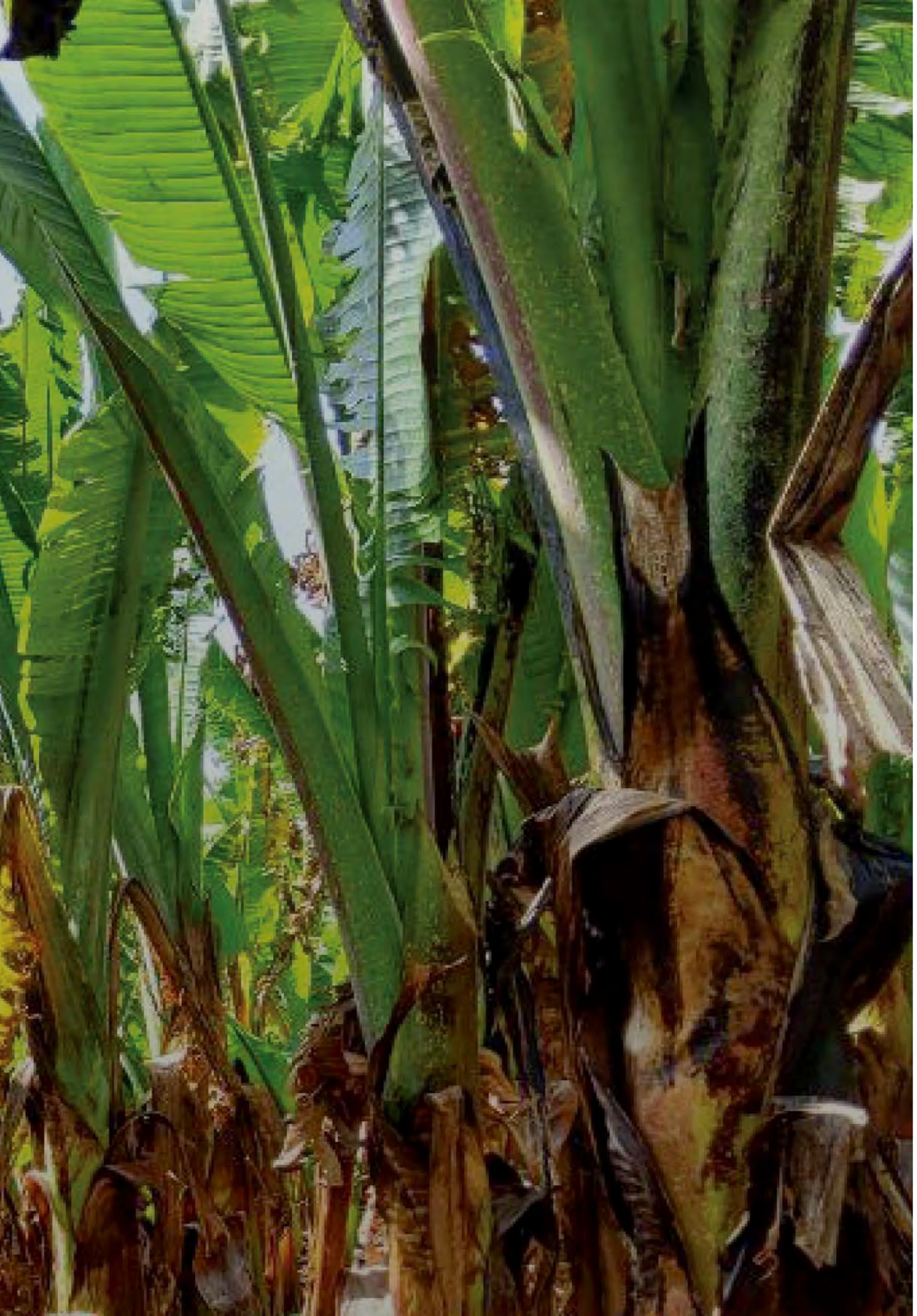


Figure 18: Garamba area ensete culture

Strengths

- Unique cultural experiences related to Sidama People, including coffee culture, Fichee-Chambalaalla festival (UNESCO Intangible Cultural Heritage), traditional food and Ayanto culture
- Rich natural attractions like Lake Hawassa, Garamba Mountain, and wildlife, ideal for eco-tourism, birdwatching and adventure tourism
- Easy access due to proximity to transportation networks like the Addis Ababa-Nairobi highway and Hawassa Airport
- Presence of the SCTSB, which is highly motivated to promote and support tourism initiatives
- Authentic Sidama tradition of welcoming visitors
- Level of safety and security for visitors in Sidama is very high
- Existing leisure and well-being experiences, including Hawassa Lake, thermal baths and hot springs
- Vibrant local markets, farming practices and handcrafts that can be integrated into tourism products
- Existing community-based tourism initiatives such as Sidama-Hanafa Cultural Village
- Existing accommodation options in Hawassa providing a baseline for further development
- Growing capacity and infrastructure for MICE tourism, such as Haile Resort and start of construction for the new Four Points by Sheraton
- E-visa system for all international visitors with minor exclusions[85]

Weaknesses

- Insufficient branding, marketing and promotion of Sidama attractions and MICE facilities
- Over-concentration of tourism in Hawassa with limited spread in the rest of the region
- Lack of a regional tourism strategy, master plan and action plans
- Dominance of traditional tourism products versus diverse, innovative and creative experiences
- Limited development of assets into viable tourist attractions.
- Lack of development of unique experiences such as birdwatching, star gazing or cultural tours
- Limited infrastructure to support access and mobility to remote attractions
- Limited infrastructure to increase recreational use of lakes and rivers
- Inadequate visitor facilities, including signage, interpretation, and digital services e.g. supplier information and booking/payment platforms
- Underdeveloped accommodation options outside Hawassa
- Universal access not always ensured at tourism sites and facilities, limiting inclusivity
- Limited infrastructure, systems and investment in sustainability practices
- Community tourism projects in early stages of development with limited capacity
- Limited capacity in immersive experiences design, storytelling, interpretation & understanding new markets
- Limited formalised and practical mechanisms to support the empowerment of communities, women and youth through tourism
- Wildlife hard to view in many places due to limited infrastructure and depleting animal populations
- Capacity issues with skilled tourism personnel and limited training opportunities
- Average short length of stay at different sites due to limited time available during standard routes
- Limited environmental sustainability of tourism facilities
- Internet access outside major centres

Opportunities

- Growing global and tour operator interest in sustainable and experiential tourism
- Positioning Sidama Region as a sustainable destination
- Development of unique experiences, based on Sidama people's culture, such as agritourism, coffee tours, community tourism, Ayanto star gazing and handcrafts
- Development of unique experiences, based on Sidama people's culture, such as agritourism, coffee tours, community tourism, Ayanto star gazing and handicrafts
- Development of Hawassa as a destination for MICE, contemporary culture, leisure, culinary and nightlife
- Improvement of the existing health and wellness product linked to hot springs and thermal baths
- Capture of the flows of visitors through Sidama who travel to Ethiopia's renowned attractions in the 'Southern Route'
- Collaboration with local universities and international organisations for conservation, research and volunteering
- Investment in digital marketing and global partnerships to boost Sidama's visibility
- Opportunities for empowerment of women, youth and marginalised groups through tourism
- Expansion of accommodation offerings outside Hawassa to enhance visitor experience and length of stay
- Expansion of MICE facilities to cater to the domestic market, including hosting regional conferences and exhibitions
- Expansion of products for domestic market to increase resilience of tourism industry

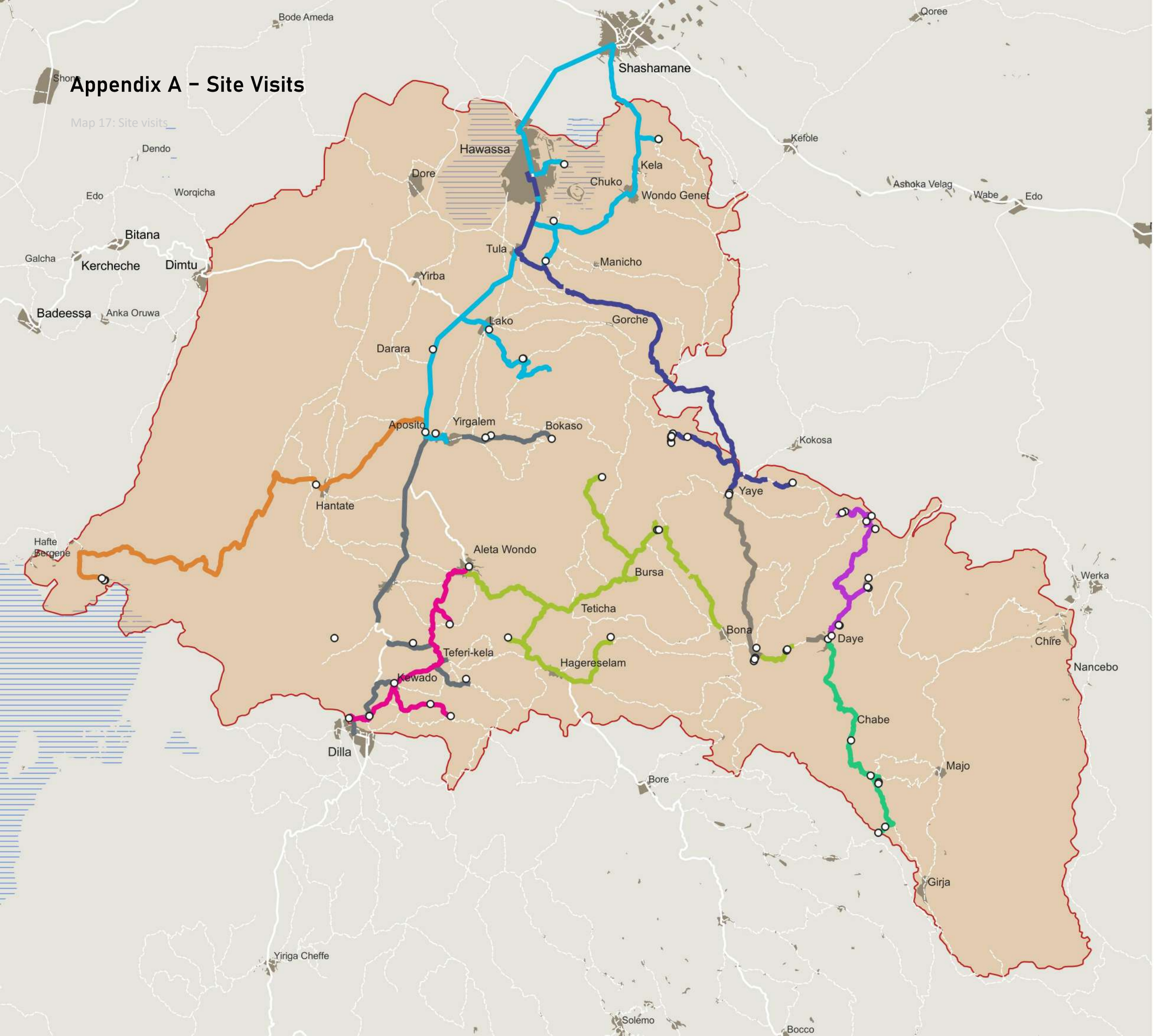
Threats

- Notwithstanding the high level of safety and security for visitors in Sidama, Ethiopia may be perceived from visitors as unsafe
- Sidama tourism product not clearly differentiated from more established destinations in Ethiopia
- Climate change impacts on natural attractions and biodiversity
- Economic instability limiting investment in tourism infrastructure
- Loss of potential tourism assets such as wildlife habitat and wildlife due to hunting, deforestation and encroachment by farming/settlements
- Construction of new tourism facilities with incongruous architectural themes and using inappropriate materials (such as reinforced concrete) and, which do not reflect the cultural traditions of the area.
- Risk of negative socio-cultural and environmental impacts of tourism if not managed sustainably
- Resource use conflict in protected areas threatens natural resources and tourism development if not managed responsibly using participatory approaches
- Challenges in business enabling environment and investment climate for foreign and domestic investors

Appendixes

Appendix A – Site Visits

Map 17: Site visits



Site visits

Legend

- 2025-02-04
- 2025-02-05
- 2025-02-06
- 2025-02-07
- 2025-02-08
- 2025-02-09
- 2025-02-10
- 2025-02-11
- 2025-02-12
- Site visited

- Main paved road
- Unpaved road
- Built-up area
- Water body
- Regional boundary

N

0 10 20 km

Source: data collected via positional tracking

Appendix B – Geo database structure

ABBREVIATIONS:

OSM = Open Street Map
GE = Google Earth
FAO = Food and Agriculture Organization

ESA = European Space Agency
GADM = Global Administrative Areas
GHSL = Global Human Settlement Layer

RTB = Regional Tourism Bureau
WDPA = World Database Protected Areas
WB = World Bank

NASA = National Aeronautics and Space Administration
EXR = EXpert's Research
ODK = Open Data Kit (direct field survey)

LAYER								ATTRIBUTE TABLE				
Thematic Area	Dataset Name	GIS layer content	GIS Layer name	Data Type	Source	Date of data	Data reliability	Name of fields (column)	Types of field	Contents (values)	Source	Notes
10 General Context	Geomorphology Hydrography from 001 to 099	Contour lines	10.001_GeoHydro_ Contour_lin [OSM].shp	Line	OSM	2003	Medium	type	text (80.0)	Contour lines (major, ordinary)	OSM	
								elevation	dec num (0,0)	nn		
		Coastline	10.002_GeoHydro_ Coasts_lin [GE].shp	line	GE	2021	Medium	type	text (80.0)	Coastline	GE	
		Topographic points	10.003_GeoHydro_ Topograph_pnt [OSM].shp	Point	OSM	2024	High	osm_id	text (254.0)	nn	OSM	
								elevation	dec num (0,0)	nn		
								name	text (254.0)	toponym		
			10.004_GeoHydro_ Topograph_4000 m_pnt [OSM].shp	Point	OSM	2024	High	osm_id	text (254.0)	nn	OSM	
								elevation	dec num (0,0)	nn		
								name	text (254.0)	toponym		
		Waterways	10.005_GeoHydro_ WatWay_lin [OSM-FAO].shp	Line	OSM FAO	2024	High	osm_id	text (254.0)	nn	OSM FAO	
								fclass	text (28.0)	river canal		
								width	dec num (0,0)	nn		
								name	text (80.0)	toponym		
			10.006_GeoHydro_ WatWay_poly [OSM].shp	Polygon	OSM FAO	2024	Low Medium High	type	text (80.0)	river canal	OSM	
								name	text (80.0)	toponym		

LAYER								ATTRIBUTE TABLE				
Thematic Area	Dataset Name	GIS layer content	GIS Layer name	Data Type	Source	Date of data	Data reliability	Name of fields (column)	Types of field	Contents (values)	Source	Notes
		Water bodies (lake, wetland,...)	10.007_GeoHydro_ WatBody_poly [OSM].shp	Polygon	OSM	2024	High	osm_id	text (254.0)	nn	OSM	
								fclass	text (28.0)	river canal		
								name	text (80.0)	toponym		
		Hillshade	10.008_GeoHydro_ Hillshade_tif [NASA].tif	tif	NASA	2003	High				NASA	
	Land Cover from 100 to 199	Built-up areas Croplands and grazing Farms Forest Scrub-land Sparse or barren vegetation Water bodies	10.100_LandCov_p oly [OSM].shp	Polygon	OSM	2024	High	fid	dec num (0,0)	nn	OSM	
								osm_id	dec num (0,0)	nn		
								code	dec num (0,0)	nn		
								fclass	text	built-up areas croplands and grazing farms		
								name	text (80.0)	toponym		
			10.101_LandCov [ESA].geotiff	tiff	ESA	2021	High	not applicable	not applicable	not applicable	ESA	
	Administrative Boundaries from 200 to 299	International borders National border Regions and autonomous. cities Woredas Kebeles	10.200_AdmBound _poly [SCTSB].shp	Polygon	SCTSB	no data	High	osm_id	dec num (0,0)	nn	SCTSB	
								type	text (80.0)	national regional woredas		
								name	text (80.0)	toponym		
			10.201_AdmBound _OutLim_poly [OSM].shp	Polygon	OSM	2024	High	osm_id	dec num (0,0)	nn	OSM	
								name	text (80.0)	toponym		
	Settlement and Population from 300	Regional capital Town Village	10.300_SettlPop_S ettlm_pnt [OCHA].shp	pnt	OCHA	2022	High	fid	dec num (0,0)	nn	OCHA	
								region	text (80.0)	toponym		
								name	text (80.0)	toponym		

LAYER								ATTRIBUTE TABLE				
Thematic Area	Dataset Name	GIS layer content	GIS Layer name	Data Type	Source	Date of data	Data reliability	Name of fields (column)	Types of field	Contents (values)	Source	Notes
	to 399		10.301_SettlPop_OutLim_pnt [OSM].shp	pnt	OSM	2024	High	fid	dec num (0,0)	nn	OSM	
								name	text (80.0)	toponym		
								type	text (80.0)	city town		
		Population density	10.302_SettlPop_Dens_poly [Kontur].shp	poly	Kontur dataset	2023	High	fid	dec num (0,0)	nn	Kontur dataset	
								density	dec num (0,0)	nn		
	Projects in the Pipeline from 400 to 499	Infrastructure	10.400_ProjPip_Infr_lin [EXR].shp	lin	EXR	2025	High	type	text (80.0)	airport port road railway electricity	EXR	
								name	text (80.0)	toponym		
								state	text (80.0)	ongoing planned		
20 Cultural/ Historic Assets	Tangible Cultural and Historical Heritage from 001 to 099	Vernacular architecture Palaeontological site Megalithic site Rock Art site Historical buildings Museum Cultural centre	20.003_TanCultHe_pnt [EXR;GE].shp	poly	EXR GE	2025	High	type	text (80.0)	archeological site historical building museum	EXR GE	
								name	text (80.0)	toponym eponym		
								source	text (80.0)	EXR name GE		
	Intangible Cultural Heritage from 100 to 199	Pilgrimages and Festivities Customs and traditions Astronomy Handcraft community Social	20.100_IntCultHe_pnt [EXR].shp	pnt	EXR	2025	High	type	text (80.0)	pilgrimages and festivities customs and traditions cultural events	EXR	
								name	text (80.0)	toponym eponym proper name		

LAYER								ATTRIBUTE TABLE				
Thematic Area	Dataset Name	GIS layer content	GIS Layer name	Data Type	Source	Date of data	Data reliability	Name of fields (column)	Types of field	Contents (values)	Source	Notes
		organisation and value						source	text (80.0)	EXR name		
30 Natural assets	Geology and landscape from 001 to 099	Landscapes of scenic beauty Geological attractions Water attractions Hot spring, mineral water Mountain	30.001_GeoLand_pnt [EXR].shp	pnt	EXR	2025	High	type	text (80.0)	waterfalls hot spring lake	EXR	
								name	text (80.0)	toponym		
								source	text (80.0)	EXR name		
	Wildlife and biodiversity from 100 to 199	Wetland Conservation area Flora Fauna National Park	30.100_Nat_pnt [EXR].shp	pnt	EXR	2025	High	place	text (80.0)	toponym	EXR	
								name	text (80.0)	toponym		
								source	text (80.0)	EXR name		
40 Infrastructure	Existing Tourism Gateways from 001 to 099	Border posts Airports	40.001_TourGate_pnt [OSM].shp	pnt	OSM	2024	High	type	text (80.0)	boder posts railway stations	OSM	
								name	text (80.0)	proper name		
	Transportation Infrastructure from 200 to 299	Road network Railways Air transport Water transport	40.200_TransInfra_lin [OSM].shp	lin	OSM	2024	High	osm-id	dec num (0,0)	nn	OSM	
								type	text (80.0)	road railway waterway		
								fclass	Text (80.0)	trunk primary secondary tertiary		
								network class	Text (80.0)	major paved road minor paved road unpaved road		
								name	text (80.0)	proper name		

LAYER								ATTRIBUTE TABLE				
Thematic Area	Dataset Name	GIS layer content	GIS Layer name	Data Type	Source	Date of data	Data reliability	Name of fields (column)	Types of field	Contents (values)	Source	Notes
			40.201_TransInfra_pnt [OSM].shp	pnt	OSM	2024	High	type	text (80.0)	airport train stations port	OSM	
								name	text (80.0)	proper name		
50 Tourism Facilities	Primary (hotels, restaurants) from 001 to 099	Hotels B&Bs Camping sites lodge restaurants	50.002_Primary_tourfacil_pnt [OSM ;EXR.shp	pnt	OSM EXR	2024 2025	High	type	text (80.0)	hotels B&Bs camping sites lodge	OSM EXR	
								name	text (80.0)	proper name		
								place	text (80.0)	toponym		
								source	text (80.0)	OSM EXR		
	Secondary (shopping, recreation) from 100 to 199	Nightlife Shopping Markets Cinema Health wellness	50.101_Secondary_tourfacil_pnt [RTB].shp	pnt	OSM	2024	High	type	text (80.0)	healthcare banking shopping	OSM	
								name	text (80.0)	proper name		
								place	text (80.0)	toponym		
	Tertiary (health, emergency) from 200 to 299	Banking Restrooms Healthcare Police stations Firefighter	50.201_Tertiary_tourfacil_pnt [Apify;GE].shp	pnt	Apify GE	2025	High	type	text (80.0)	healthcare banking shopping	Apify GE	
								name	text (80.0)	proper name		
								source	text (80.0)	Apify GE		
60 Environment and Climate	Protected Areas from 001 to 099	National parks Regional parks Biosphere Reserves Wildlife Reserves	60.001_ProtArea_poly [WDPA;SCTSB].shp	Poly	WDPA SCTSB	2021 2018	High	type	text (80.0)	national Forest controlled hunting area sanctuary	WDPA SCTSB	
								name	text (80.0)	proper name		

LAYER								ATTRIBUTE TABLE				
Thematic Area	Dataset Name	GIS layer content	GIS Layer name	Data Type	Source	Date of data	Data reliability	Name of fields (column)	Types of field	Contents (values)	Source	Notes
Change		Sanctuaries Community conservation areas						status	text (80.0)	designated proposed		
								source	text (80.0)	WDPA SCTSB		
70 Other	Field surveys from 001 to 099	Site visited Tracks	70,010_SiteVisit_pnt[EXR].shp	pnt	EXR	2025	High	name of the site	text (254.0)	toponym	EXR	
								time of submission	text (24.0)	date		
								layer source	text (80.0)	ODK		
			70.050_SiteVisitTrack_lin[EXR].shp	lin	EXR	2025	High	time data (hours)	text (80.0)	tracking time hours	EXR	
								time data (days)	text (80.0)	date of tracking		
								layer source	text (80.0)	.gpx		
	Processed data from 100 to 199	Clusters	70.100_Clusters_poly[EXR].shp	poly	EXR	2025	High	cluster	text (80.0)	name of the cluster	EXR	

Footnotes

[1] *Ease of Doing Business rankings. Retrieved January 29, 2025, from https://archive.doingbusiness.org/en/rankings*

[2] *MoT (2024) Ethiopia Satellite Account*

[3] *Data provided by MoT in 2025.*

[4] *MoCT (2015) Tourism Branding Strategy for Ethiopia*

[5] *Ge'ez is an ancient script used in Ethiopia in ancient times.*

[6] *Ethiopian Central Statistical Agency, Census 2007*

[7] *Ethiopian Central Statistical Agency*

[8] *Sidama Culture, Tourism and Sport Bureau*

[9] *Consultant's estimates based on information provide d by the SCTSB*

[10] *Budusa et al (2023) - Spatiotemporal variability and trend of rainfall and temperature in Sidama Regional State, Ethiopia.pdf*

[11] *EPA (2024) - Report on Status, Challenges and counter measures in Natural Resources in Sidama Region*

[12] *Meshesha, T. (2014) Local Government in Ethiopia: Practices and Challenges. Wubneh, M. (2007) Ethnic Identity Politics and the Restructuring of Administrative Units in Ethiopia. International Journal of Ethiopian Studies.*

[13] *The 2007 Population and Housing Census of Ethiopia, conducted by the Central Statistical Agency (CSA), provides comprehensive demographic data at national, regional, and local levels.*

[14] *Environmental Protection Agency (2024) Report on Status, Challenges and counter measures In Natural Resource in Sidama Region*

[15] *Flights are operated by Ethiopian Airlines and as of this writing there are are four scheduled flights per day with a fare of around 40 USD (https://www.ethiopianairlines.com/en-et/flights-from-addis-ababa-to-hHawassa) .*

[16] *Ethiopian Roads Administration*

[17] *Ethiopian Roads Administration. The project commenced on 27 September 2017, with an original planned duration of three years. As of March 2023, the project has achieved 66.12% completion, with a performance rating of 76.13%.*

[18] *The rainy season in Sidama typically occurs during the kiremt, which spans from June to September, with peak rainfall usually observed in July and August. This period is characterised by heavy rains, making some roads, particularly unpaved or dry-weather roads, challenging to navigate due to mud and waterlogging. Additionally, the belg season, a shorter rainy period, occurs from March to May, though rainfall is less intense compared to the kiremt.*

[19] *Dara Kafala Kambata (2023) Human Death Due to Road Traffic Accidents in Sidama Regional State, Ethiopia: A Finite Mixture Count Regression Analysis*

[20] *The classification of tourism facilities in primary, secondary and tertiary is taken from the Ethiopia sustainable Tourism Master Plan 2015-2025, section 2.7.*

[21] *Ethiopia: Ministry Says New Hotel Star Rating System Will be in Place. Retrieved January 13, 2025, from https://www.2merkato.com/news/alerts/7926-ethiopia-ministry-saya-new-hotel-star-rating-system-to-be-in-place*

[22] *https://hailehotelsandresorts.com/hawassa-resort/*

[23] *https://www.lewihotelsandresort.com/hawassa.php*

[24] *https://www.tripadvisor.com/Hotel_Review-g1071626-d5230903-Reviews-South_Star_International_Hotel-Awasa_Southern_Nations_Nationalities_and_People_s_Regi.html*

[25] *https://www.aregashlodge.com/index.htm*

[26] *https://www.marefiale.com/en/detail/2262-furra-hotel*

[27] *https://www.tripadvisor.com/Hotel_Review-g1924869-d1900601-Reviews-Wondo_Genet_Resort_Hotel-Wondo_Genet_Southern_Nations_Nationalities_and_People_s_Regi.html*

[28] *Tourism Ethiopia (2021) Ethiopia Tourism Investment Profile, p38*

[29] *https://visitsidama.travel/*

[30] *https://sida.org.et/*

[31] *https://commonriver.wordpress.com/our-work/education-and-literacy-programs/visiting-and-volunteering/voluntourism-in-ethiopia*

[32] *http://www.hu.edu.et/*

[33] *https://www.adaremedicalcentre.ie/*

[34] *https://yanetmedicalcenter.com/*

[35] *https://www.uzh-foundation.org/en/projects/bushulo-mother-and-child-speciality-center?utm_source=chatgpt.com*

[36] *https://arm.moh.gov.et/index.php/site-to-visit/*

[37] *Ethiotelecom Launches 5G Services in Hawassa - Capital Newspaper. Retrieved January 24, 2025, from https://capitalethiopia.com/2024/11/04/ethiotelecom-launches-5g-services-in-hawassa/*

[38] *Verner et al. (2018) Geological map at a scale of 1:50,000, Geological and thematic maps at a scale of 1:50,000 for Mejo, Leku, Arba Minch and Dila areas, SNNPR, Ethiopia. Czech Geological Survey, Prague, Map Sheet 0638-D2 Mejo*

[39] *https://visitsidama.travel/sidama-region/*

[40] *EPA (2024) - Report on Status, Challenges and counter measures in Natural Resource in Sidama Region*

[41] *Zacek et al. (2014) - Kogarkoite, Na3(SO4)F, from the shalo hot spring, Main Ethiopian Rift: Implications for F-enrichment of thermal groundwater related to alkaline silicic volcanic rocks.*

[42] *EPA (2024) - State of Environment and Natural resource data preparation desk. Report on Status, Challenges and counter measures In Natural Resource in Sidama Region. EPA, Addis Ababa.*

[43] *Worku Z and Girma Z. (2020) - Large Mammal Diversity in Nensebo Forest, Southern Ethiopia. International Journal of Zoology Volume 2020, Article ID 8819019, 11 pages https://doi.org/10.1155/2020/8819019.*

[44] *Demeke A, Tamene S, Kifle E, Mengesha G. (2019) - Diversity and relative abundance of birds in Loka Abaya National Park, Sidama Zone,*

Footnotes

Southern Ethiopia. International Journal of Biodiversity andConservation 11: 230-240.

[45] *Jemal Z and Sultan M. (2019) - Species Composition and Relative Abundance of Birds at Arbegona, Geremba Mountain Fragment Forest, Southern Ethiopia. Advances in Life Science and Technology, 71.*

[46] *Takle S and Endale G. (2019) - Species' composition and relative abundance of Lakeshore bird species around Lake Hawassa, Ethiopia. International Journal of Biodiversity and Conservation, 11(6): 175-182.*

[47] *Girma Z, Mamo Y, Ersado M. (2012) - Species Composition, Distribution and Relative Abundance of Large Mammals in Wondo Genet Forest Patch, Southern Ethiopia. Asian Journal of applied Sciences, ISSN 1996-3343 / DOI: 10.3923/ajaps, 2012.*

[48] *EPA (2024) - Fact Sheet of Machisho Forest Ecosystem In Sidama Region. EPA, Addis Ababa.*

[49] *Ethiopia urged to increase budget allocation for cultural sector. Retrieved February 12, 2025, from https://capitalethiopia.com/2024/11/29/ethiopia-urged-to-increase-budget-allocation-for-cultural-sector/*

[50] *Tekle Hagos (2011). The Ethiopian Rock Arts: The Fragile Resources. ARCCEH, Addis Ababa; Yonas Beyene, Metassebia Bekele & Alemseged Beldados (2015). Recent Archaeological Findings from South Ethiopia. Association for Research and Conservation of Culture, ARCC, Hawassa, Ethiopia.*

[51] *Yonas, Metassebia and Alemseged, (2015) - Recent Archaeological Findings from South Ethiopia*

[52] *Yonas, Metassebia and Alemseged, (2015) - Recent Archaeological Findings from South Ethiopia*

[53] *Francis Anfray (1982). Des milliers de stèles au coeur du Sidamo. Annales d'Ethiopie, 12. pp. 121-129.*

[54] ማርቆሰ ተክሌ እና አበሮቹ፣ የሲዳማ ብሔር ታርክና ባህል (ሀዋሳ *2003* ዓ.ም)። *English Version: Markos Tekile, et al, (2011). The History and Culture of Sidama Nation. (Sidama Zone Culture, Tourism, and Affairs, Hawaasa.*

[55] *Shiferaw Muleta (2019) - "A Brief Political History of Sidama Nation for Self-rule" Addis Standard, May, 30.*

[56] ቤታና ሆጤሶ፣ ሲዳማ…ሕዝብና ባህሉ (አዲሰ አበባ *1983* ዓ.ም)። *English Version:Betana Hotesso (1991) The Sidama People and their Culture. Bole Printing Press, Addis Ababa.*

[57] *UNESCO (2014) - Format for National Register of the Intangible Cultural Heritage of Ethiopia Register no. 0003.*

[58] *Eyasu Erbo, (2016), Customary Governance system of the Sidama, Case of Arbegona Worada.M.A. Thesis, Hawassa University, Governance.*

[59] *EFCC (2020) - Ethiopian National Environmental Law Development and Enforcement Programme*

[60] *BirdLife International is a global partnership of non-governmental organizations dedicated to the conservation of birds and their habitats. Established in 1922, it collaborates with over 120 national partners worldwide https://www.birdlife.org/.*

[61] *SCTSB (2018) - Loka Abaya National Park Boundary Demarcation & Survey Report*

[62] *https://www.iucnredlist.org/species/pdf/3145291*

[63] *https://datazone.birdlife.org/site/factsheet/Senkelle-sanctuary-iba-ethiopia*

[64] *Mamo Y, Mengesha G, Fetene A, Sahle K and Girma M. 2012. Status of the Swayne's Hartebeest, (Alcelaphus buselaphus swaynei) metapopulation under land cover changes in Ethiopian Protected Areas. International Journal of Biodiversity and Conservation, 4(12): 416-426.*

[65] *SCTSB (2023) - Garamba Mountain Community Based Conservation Area (GCBCA) Demarcation & Survey Report*

[66] *Bekele (2015) - Eco tourism potential of Garamba and the surrounding*

[67] *Takle S and Endale G. (2019) - Species' composition and relative abundance of Lakeshore bird species around Lake Hawassa, Ethiopia. International Journal of Biodiversity and Conservation, 11(6): 175-182.*

[68] *Environmental Protection Agency (2024) - Report on Status, Challenges and counter measures in Natural Resources in Sidama Region*

[69] *Bekele (2015) - Eco tourism potential of Garamba and the surrounding*

[70] *Environmental Protection Agency(2024) - Report on Status, Challenges and counter measures in Natural Resources in Sidama Region*

[71] *EPA (2024) - Report on Status, Challenges and counter measures in Natural Resources in Sidama Region*

[72] *Ibidem*

[73] *ESA (2022) - Hotels grading requirements and classification*

[74] *The WB in Ethiopia Overview, https://www.worldbank.org/en/country/ethiopia/overview*

[75] *Central Statistics Authority of Ethiopia*

[76] *WB & LSMS (2023) Ethiopia Socioeconomic Panel Survey 2021/22 Survey Report (sample of 4,999 households implemented after COVID-19) https://microdata.worldbank.org/index.php/catalog/6161/related-materials*

[77] *UNICEF & Central Statistical Agency (2019) Multidimensional Child Deprivation in Ethiopia: Policy Brief https://www.unicef.org/esa/media/3126/file/UNICEF-Ethiopia-2018-Multidimensional-Child-Deprivation-Brief.pdf.pdf*

[78] *Federal Democratic Republic of Ethiopia (2019) Ethiopia Mini Demographic & Health Survey 2019*

[79] *WB & LSMS (2023) Ethiopia Socioeconomic Panel Survey 2021/22 Survey Report*

[80] *These gaps are substantiated by a growing number of monitoring systems in place for Ethiopia by the Women, Business and Law (WBL) Index Score, WB Gender Landscape Profile and the Gender Inequality*

Footnotes

Index1 in which Ethiopia ranked 125 out of 166 countries in 2022.

[81] *Biased gender social norms is used to refer to the undervaluation of women's capabilities and rights in society that constrain women's choices and opportunities by regulating behaviour and setting the boundaries of what women are expected to do and be. Source: UNDP (2023) Gender Social Norms Index: Breaking Down Gender Biases. https://hdr.undp.org/content/2023-gender-social-norms-index-gsni#/indicies/GSNI*

[82] *FDRoE (2019) - Ethiopia Mini Demographic & Health Survey 2019*

[83] *UNICEF Ethiopia (2022) SNNPR Regional Brief. https://www.unicef.org/ethiopia/media/6516/file/SNNPR%20regional%20brief.pdf*

[84] *National youth unemployment rate (% total workforce aged 15-24) in Ethiopia stands at 6.4% (2021) ILO Estimate*

[85] *Ethiopia eVISA | www.ethiopia-evisa.com. Retrieved February 11, 2025, from https://www.ethiopia-evisa.com/*

ቱሪዝም ሚኒስቴር
MINISTRY of TOURISM

Ethiopia
LAND OF ORIGINS

INTERNATIONAL TOURISM SURVEY

2024



with financial Support:

JICA



INTERNATIONAL TOURISM SURVEY

2024

ቱሪዝም ሚኒስቴር
MINISTRY of TOURISM

with financial Support:

JICA

© Ministry of Tourism 2024
Published by:
FDRE Ministry of Tourism,
Addis Ababa, Ethiopia
www.mot.gov.et

Prepared by:
FDRE Ministry of Tourism,
Tourism Statistics and Information Team

Data from this publication may be reproduced, applied or processed, provided MoT is acknowledged as the original source of the data.

ቱሪዝም ሚኒስቴር
MINISTRY of TOURISM

Ethiopia
LAND OF ORIGINS

- TABLE OF CONTENTS -

LIST OF TABLES 7
LIST OF FIGURES 8
ACRONYMS AND ABBREVIATION 9
GLOSSARY 14
- PREFACE (MOT) - 11
- MESSAGE - 12
- ACKNOWLEDGMENT - 13
1.1 GLOBAL PERSPECTIVE 19
1.2 TOURISM DEVELOPMENTS IN ETHIOPIA 20
1.2.1 Inbound Tourism 20
1.2.2 Outbound Tourism 23
- CHAPTER 2 -METHODOLOGY 25
2.1 INTRODUCTION 26
2.2 SCOPE OF THE SURVEY 26
2.3 SAMPLE SIZE 26
2.4 THE SAMPLE FRAME 26
2.5 DATA COLLECTION 27
2.6 QUESTIONNAIRES 27
3.1 INTRODUCTION 29
3.2 EXIT SURVEY RESULTS AND FINDINGS 30
3.2.1 Sex of Respondents 30
3.2.2 Age of Respondents 30
3.2.3 Country of Residence of Respondents 31
3.2.4 Occupation and Education of Respondents 32
3.2.5 Main Purpose of Visit of Respondents 32
3.2.6 Travel Party 33
3.2.7 History of Visit 33
3.2.8 Source of Information 34
3.2.9 Main Attraction 34
3.2.10 Travel Arrangement 35
3.2.11 Package Items/ Service Provided 36
3.2.12 Length of Stay/ Nights 36
3.2.12.1 Regional Distribution by Length of Stay/nights 37
3.2.12.2 Length of Stay/nights by Trip Arrangement 37
3.2.12.3 Length Of Stay/Nights by Region 38
3.2.12.4 Length of Stay/Nights by Purpose of Visit 39
3.2.13 Visitors' Expenditure 40
3.2.13.2 Distribution Expenditure by Items 40
3.2.13.1 Average Length of Stay/ Nights by Trip Arrangement 40
3.2.13.5 Expenditure by Purpose of Visit 43

3.2.13.6 Expenditure by Country of Residence 44
3.2.14 Evaluation of Tourist Related Services 45
3.2.15 Rating Experience 46
3.2.16 Visit Ethiopia Again 46
3.2.17 Write on Social Media About Ethiopia 47
3.2.18 Recommend Ethiopia to Others 47
3.3 ENTRY SURVEY FINDINGS AND RESULTS (OUTBOUND) 48
3.3.1 Sex of respondents 48
3.3.2 Age of Respondents 48
3.3.3 Occupation and Education of Respondents 49
3.3.4 Main Purpose of Visit of Respondents 49
3.3.5 Travel Party 50
3.3.6 Destinations 50
3.3.7 Main Activities 51
3.3.8 Type of Accommodation 52
3.3.9 Travel Arrangement 53
3.3.10 Length of Stay/ Nights 54
3.3.10.2 Length of Stay by Purpose of Visit 56
3.3.10.3 Length of Stay by Travel Arrangement 56
3.3.11 Expenditure 57
3.3.11.1 Average Daily Expenditure 58
3.3.11.2 Distribution of Expenditure by Items 59
3.3.11.3 Distribution of Average Expenditure Purpose of Visit 60
3.3.11.4 Top 20 Destination Countries by Expenditure 61
3.3.11.5 Expenditure by Travel Arrangement 61
3.3.12 Modes of Payment 62
- APPENDIX - 63
Appendix -A1: Inbound- Visitor Exit Survey Questionnaire (2024) 65
Appendix -A - Survey Questionnaire (2024) 65
Appendix -A2: Outbound - Visitor Entry Survey Questionnaire (2024) 68
Appendix -B - Inbound Tourism - 2023 71
Appendix -B1 - International Visitors Arrival By Country of Residence - 2023 71
Appendix -B2 - International Visitors Arrival by Sex - 2023 74
Appendix -C1 - International Departures by Ethiopians by Country of Destination- 2023 75
Appendix -C2 - Monthly International Departures by Ethiopians - 2023 77
Appendix -D - International Visitors Exit Survey (2019) 78
Appendix- D1- International Visitors Exit Survey (2019) - Questionnaire 78
Appendix -D2- International Visitors Arrival By Country of Residence - 2019 80
Appendix -D3- International Visitors Arrival By Purpose of Visit - 2019 81
Appendix -D4- International Visitors Exit Survey Results Highlight - 2029 82

LIST OF TABLES

Table 1.1: Global International Tourist Arrivals by Regions, 2019-2023 20

Table 1.2: International Tourist Arrivals by Regions, 2021-2023 21

Table 1.3: Top 10 Source Markets, 2021-2023 22

Table 1.4: Top 10 Destinations, 2023 23

Table 1.5: Top 10 Destinations, 2023 24

Table 3.1 Occupation and Education of Respondents 32

Table 3.2 Travel Party 33

Table 3.3 Source of Information 34

Table 3.4 Main Attraction 35

Table 3.6 Length of Stay/Nights: Overall Average 36

Table 3.7 Regional Distribution By Length of Stay/nights 37

Table 3.8 Average Length of Stay/nights by Trip Arrangement 37

Table 3.9 Average Length of Stay/Nights By Country of Residence Categorized by Regions (weighted) 38

Table 3.10 Average Length of Stay by Purpose of Visit (weighted) 39

Table 3.11 Visitors' Expenditure: Total Average 40

Table 3.12 Average Expenditure by Trip Arrangement 40

Table 3.13 Distribution Expenditure by Items 41

Table 3.14 Distribution Expenditure by Items 42

Table 3.16 Expenditure by Purpose of Visit 43

Table 3.17 Expenditure by Country of Residence (Weighted) 44

Table 3.18 Evaluation of Tourist Related Services 45

Table 3.19 Rating Experience 46

Table 3.20 Visit Ethiopia Again 46

Table 3.21 Write on Social Media About Ethiopia 47

Table 3.22 Recommend Ethiopia to Others 47

Table 3.23 Occupation And Education of Respondents 49

Table 3.24 All Destinations 51

Table 3.25 travel arrangements Assistance 53

Table 3.26 Length of Stay 54

Table 3.27 Distribution of Length of Stay by Destination Country 55

Table 3.28 Length of Stay by Purpose of Visit 56

Table 3.29 Length of Stay by Travel Arrangement 57

Table 3.30 Overall Average Expenditure 57

Table 3.31 Average Daily Expenditure USD (Weighted) 58

Table 3.32 Distribution of Expenditure by Items 59

Table 3.33 Distribution of Average Expenditure Purpose of Visit 60

Table 3.35 Expenditure by Travel Arrangement 62

LIST OF FIGURES

Figure 1.1: global international tourist arrivals, 2012-2023 19
Figure 1.2: international tourist arrivals, 2012-2023 20
Figure 1.3: monthly international tourist arrivals, 2023 21
Figure 1.4: international tourist arrivals by purpose of visit, 2021-2023 22
Figure 1.5: monthly international departure for Ethiopians, 2023 23
Figure 3.1 sex of respondents 30
Figure 3.2 age of respondents 31
Figure 3.3 distribution by region of residence 31
Figure 3.4 main purpose of visit of respondents 32
Figure 3.5 history of visit 34
Figure 3.6 travel arrangement 35
Figure 3.7 package items or tourist services provided 36
Figure 3.8 top 20 countries by expenditure 42
Figure 3.9 sex of respondents 48
Figure 3.10 age of respondents 48
Figure 3.11 main purpose of visit of respondents 50
Figure 3.12 travel party 50
Figure 3.13 destinations 51
Figure 3.14 travel party 52
Figure 3.15 type of accommodation 52
Figure 3.16 travel arrangement 53
Figure 3.17 distribution of length of stay by region of residence 54
Figure 3.18 top 20 destination countries by expenditure 61
Figure 3.19 distribution of modes of payment 62

ACRONYMS AND ABBREVIATION

ESS	Ethiopian Statistics Services
ICS	Immigration and Citizenship Services
JiCA	Japan International Cooperation Agency
MoPD	Ministry of Planning and Development
MoT	Ministry of Tourism
UNWTO	United Nation Tourism Organization



- PREFACE -



It is with great pleasure that I present the Fourth International Tourism Survey report— a critical component of ongoing efforts to strengthen Ethiopia's tourism sector through reliable, data-driven insights.

Tourism is one of the five priority sectors under Ethiopia's Homegrown Economic Reform, recognized for its potential to drive economic growth, create jobs, and elevate our country's global standing. To fully leverage this potential, we must ground our strategies in solid empirical evidence. By embedding data-driven approaches into our sector's operations, we can ensure that Ethiopia's tourism development is responsive and sustainably competitive aligning with our national economic goals.

Fully cognizant of the need to pursue evidence based policy directions, the Ministry of Tourism remains committed to enhancing the quality of tourism statistics and improving the measurement of the sector's economic impact by institutionalizing data-driven tourism planning and development. This report is a testament to this commitment. It provides an up-to-date assessment of Ethiopia's tourism on the basis of key international tourism indicators, highlighting the sector's rebound and recent gains, while offering valuable data to inform policy, investment, and strategic planning to ensure Ethiopia continues to build on this positive momentum.

It is to be recalled that Ethiopia has recently published the first Tourism Satellite Account (ET-TSA) which unveiled the economic contribution of Tourism. In light of this, the International Tourism Survey report we are presenting now is very instrumental to building a robust system of tourism statistics and cement efforts to measure the overall economic impacts of tourism development in Ethiopia.

I encourage all stakeholders—government agencies, private sector actors, development partners, and researchers—to engage with the findings presented in this report. More than just a resource, this report is a call to action—reinforcing the need for a culture where decisions are guided by facts, not assumptions.

H.E. Mrs. Selamawit Kassa

Minister of Ministry of Tourism

- MESSAGE -



I would like to congratulate Ministry of Tourism for the successful completion of the survey as well as the publication of "2024 International Tourism Survey: A Comprehensive Report". The importance of the survey cannot be underestimated for the effective policy making that reflects the actual situation and for the marketing that bases on the objective data to attract tourists from different corners of the world.

Ethiopia is blessed with rich natural resources, as well as profound historical and cultural assets. As the global tourism industry continues to develop and is increasingly recognized as essential, Ethiopia can seize these opportunities for growth.

This survey is vital for all tourism stakeholders to invest in, improve services, and enhance the experience and satisfaction of travelers, by recognizing the country's potential and also by understanding what tourists are looking for in Ethiopia. I would be glad that if this survey could provide the insights to the policy makers, travel agencies and academicians to attract more tourists in Ethiopia and assist to develop sustainable tourism in this country.

Furthermore, Ethiopia launched its Tourism Satellite Accounts (TSA) for the first time in 2024. TSAs are essential tools for measuring and understanding the multifaceted economic contributions of tourism. They guide effective policymaking and investment strategies that can enhance both national and regional economies. The outcomes of this survey will further contribute to the future development of TSAs.

JICA has dispatched a team of tourism experts to the Ministry of Tourism since the summer of 2023, focusing on policy, marketing, and promotion. Also, JICA financially and technically supported this survey by assisting the trainings for the enumerators and the survey itself at the Bole International Airport.

Finally, I would like to appreciate the Ministry of Tourism officials, trainers from the Ministry of Planning and Development, Ethiopian Statistical Services and enumerators who enthusiastically contributed to this survey.

Mr. Kensuke Oshima

Chief Representative of Japan International Cooperation Agency (JICA) Ethiopia Office

- ACKNOWLEDGMENT -

The Ministry of Tourism is pleased to announce the successful completion of the 2024 International Tourism Survey, made possible through the generous financial support of the Japan International Cooperation Agency (JICA) Ethiopia Office and the technical assistance provided by the Ministry of Planning and Development and the Ethiopian Statistics Service.

This achievement would not have been possible without the invaluable contributions and collaboration of our esteemed stakeholders. The Ministry extends its deepest gratitude to the management and staff of Bole International Airport, particularly the Aviation Security Office, for greatly facilitating the data collection process.

We would like to express our sincere gratitude to Mr. Feleke Demsis, CEO of the Ministry of Planning and Development National Account and Statistics, as well as to Senior Experts Mrs. Sabita Tofik and Mrs. Lewam Teshome. Our appreciation also extends to Mr. Damtew Berhanu, CEO of the Ethiopian Statistics Service Methodology, and Senior Experts Mr. Derejaw Amare and Mr. Tewodros Negussie, for their exceptional technical expertise and unwavering commitment to maintaining high standards of quality throughout the design and implementation of the survey. We also wish to extend our deepest thanks to the field researchers and data entry personnel, whose unwavering dedication and professionalism were instrumental to the success of the survey.

Finally, we express our profound gratitude to Ms. Satoko Hara and Ms. Yoshiko Maruyama for their exemplary coordination and liaison efforts with JICA throughout the implementation of this survey.

Ms. Demitu Kelbessa

Leader, Statistics and Information Team of Ministry of Tourism

- GLOSSARY -

Excursionist: A (same-day visitor) who is a non-resident visitor arriving and departing from a country within the span of a single day.

Inbound Tourism: The activities of a non-resident visitor within the country of reference. In the context of Ethiopia, this refers to international visitors coming to Ethiopia for various purposes such as leisure, business, conference, or other personal reasons.

Inbound Tourists and Visitors (Ethiopia): These are international visitors and tourists who travel to Ethiopia.

Independent/Non-package Tour: Self travel arrangement where travelers plan their trip independently without using pre-arranged packages. All items and services are purchased separately at the host destination.

Length of Stay: Refers to the total number of nights a visitor spends in a destination during their trip. It's a key metric in tourism that helps to understand traveler behavior, the demand for accommodation, and the economic impact on the destination.

Outbound Tourism: Residents of one country traveling to another country for various purposes such as leisure, business, conference, or other personal reasons. In the context of Ethiopia, this refers to Ethiopian residents traveling abroad for various purposes.

Outbound Tourists and Visitors (Ethiopians): These are Ethiopian residents who travel abroad.

Package Tour: A pre-arranged trip (normally by travel agents) done outside the country with a combination of elements such as air, hotel, sightseeing, and social events put together and sold at an all-inclusive price in a single transaction.

Purpose of Visit: The reason that necessitates the trip, in the absence of which the trip would not have taken place. According to the UNWTO, this includes:

- Leisure, Recreation and Holidays: Travel for enjoyment, relaxation, or entertainment, such as vacations or sightseeing.
- Visiting Friends and Relatives: Trips taken to spend time with family members or friends who live in different places.
- Business and Professional: Travel related to one's job or career, such as attending meetings, conferences, or business trips.
- Health and Medical Care: Journeys made for the purpose of receiving medical treatment or health-related services.

- Religion and Pilgrimage: Travel undertaken for religious reasons or to visit sacred sites.
- Other Purposes: Any other reasons for travel that don't fit into the main categories, like education or training.
- MICE (Meetings, Incentives, Conferences, and Exhibitions): Travel for organizing or participating in meetings, incentive trips, conferences, and exhibitions, typically related to business or professional activities

.

Tourist: A person who travels to a country or place outside their usual environment for personal or business purposes for a period less than one year, and during which the stay includes at least one overnight stay.

Foreign Currency Expenditure: This refers to the money spent by residents of a country when they travel abroad. Such expenditure contributes to tourism leakage, as it represents an outflow of foreign currency from the home country to the destination country. Consequently, it reduces the foreign currency reserves of the home country and can impact its balance of payments.

Tourism Expenditure (Tourism Revenue): Refers to the total amount of money spent by visitors during their travel to and stay at a destination. This includes spending on various goods and services such as accommodation, food and beverages, entertainment, transport, shopping, and other travel-related expenses. It is a crucial metric for understanding the economic impact of tourism on a destination, as it helps to gauge the revenue generated from inbound.

Visitor: A broader term that includes tourists as well as excursionists. Excursionists are those who travel to a main destination outside their usual environment for less than 24 hours.



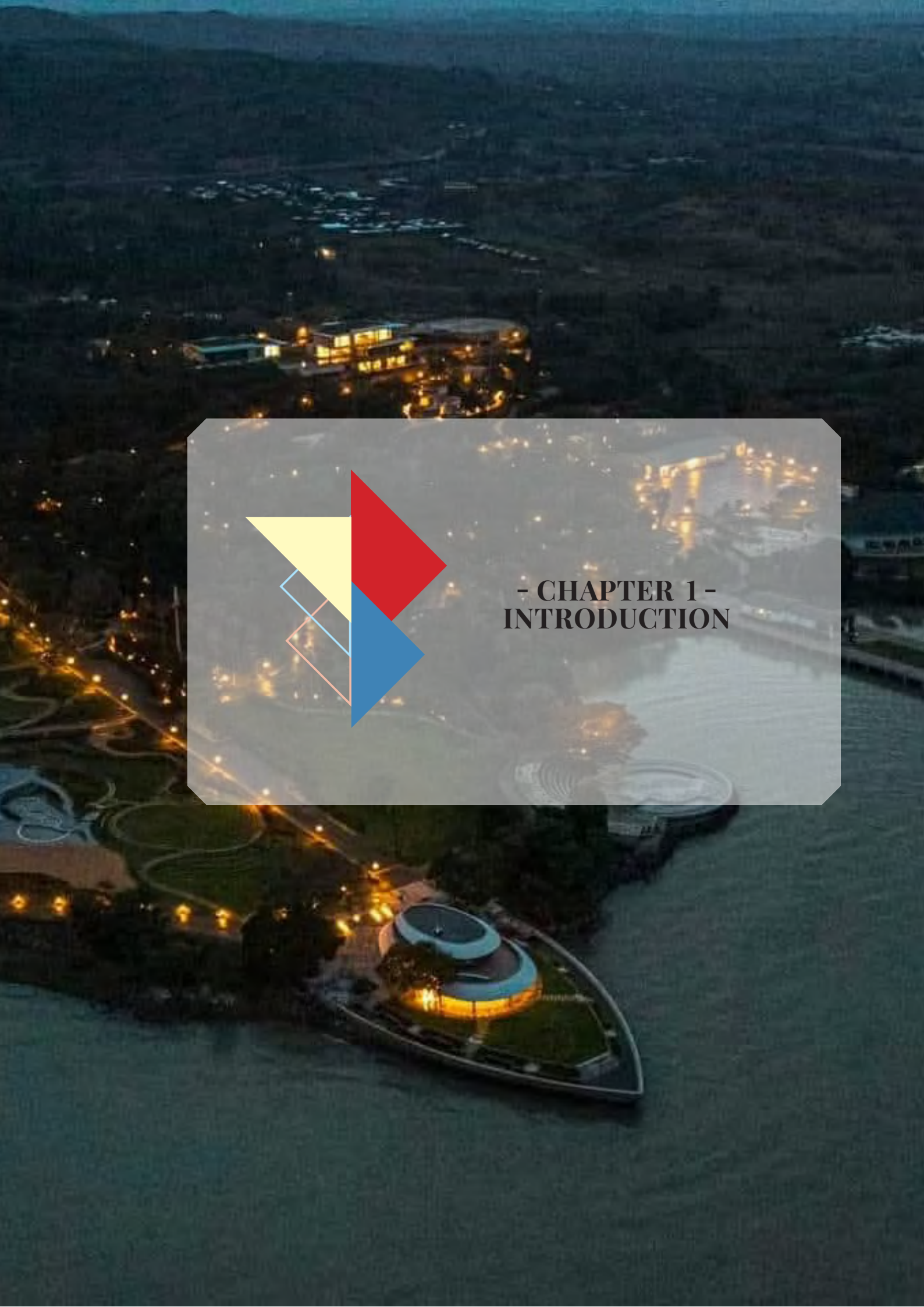
- EXECUTIVE SUMMARY -

International tourism has demonstrated a remarkable recovery, with global arrivals rebounding to 88 percent of pre-pandemic levels in 2023. Projections for 2024 indicate a full recovery to pre-pandemic figures, with early estimates forecasting a 2 percent growth beyond 2019 levels. Reflecting this global trend, Ethiopia achieved a significant recovery, experiencing a 32.82 percent increase in international visitors, rising from 811,604 in 2019 to an all-time high of 1,077,900 in 2023.

To effectively capitalize on the reopening of global tourism, it is essential to understand post-pandemic tourist behaviors, preferences, and expenditure patterns. These insights are crucial for optimizing tourism offerings, informing policy decisions, and enhancing the sector's competitiveness. The 4th International Tourism Survey offers valuable data to address existing gaps in immigration statistics, providing a comprehensive view of tourism dynamics. This data empowers stakeholders to develop evidence-based policies, craft strategies that respond to evolving market trends, and further elevate the sector's economic contributions.

Key findings from the inbound tourism survey reveal a diverse visitor demographic, with the largest age groups being 30-39 and 40-49 years. The majority of visitors originated from Europe (47.64 percent) and the Americas (26.51 percent), with a notable proportion of repeat visitors, reflecting Ethiopia's strong capacity to retain tourists. The primary motivations for visiting Ethiopia included cultural attractions, visiting friends and relatives, and experiencing local cuisine. A noteworthy 89.17 percent of visitors organized their trips independently, signaling a preference for non-package travel. On average, visitors spent 16.71 days in Ethiopia, with average daily expenditure of USD 166.66. The primary expenditure categories were accommodation, air transport, and food and beverage services. Visitor satisfaction was notably high, with 84.9 percent expressing overall satisfaction with their experience, and 89.8 percent indicating an intention to return for future visits.

The findings of the outbound tourism survey, derived from respondent data, indicate that Ethiopian travelers primarily traveled for business, leisure, or to visit friends and relatives. A significant proportion of respondents reported a preference for hotel accommodations and independently planned itineraries. Key expenditure categories included air transport, shopping, and accommodation services. Furthermore, the survey revealed that the average daily expenditure of outbound travelers was USD 112.41 with an average trip duration of 25.29 days. Holiday and leisure travelers emerged as the highest spenders. Respondents identified the USA, Europe, UAE, and India as the most frequented destinations. Additionally, the survey highlighted a strong preference for debit and credit card transactions among outbound tourists, reflecting evolving payment trends.



- CHAPTER 1 -
INTRODUCTION

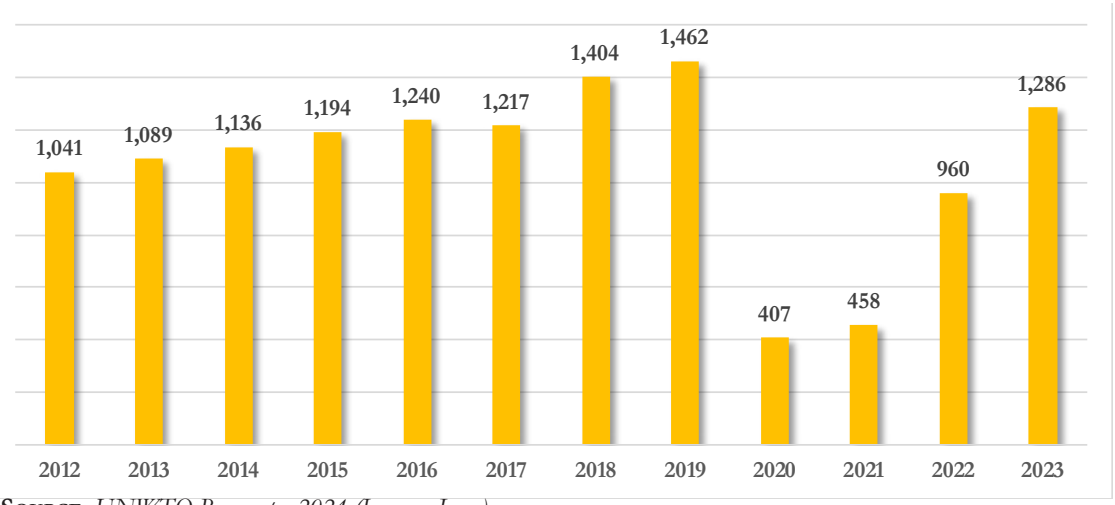
1.1 GLOBAL PERSPECTIVE

The tourism sector has shown a remarkable global resurgence, with numerous destinations achieving or exceeding pre-pandemic levels of international arrivals and revenue. According to the January 2024 UNWTO World Tourism Barometer, international tourism rebounded to 88 percent of pre-pandemic levels in 2023, reaching an impressive 1.3 billion arrivals.

The Middle East spearheaded this recovery, surpassing pre-pandemic levels by 22 percent. Meanwhile, Europe, Africa, and the Americas achieved 94 percent, 96 percent, and 90 percent of their respective pre-pandemic benchmarks.

Projections for 2024 indicate a full recovery of international tourism to pre-pandemic levels, with early estimates forecasting a 2 percent growth beyond 2019 figures. (Figure 1.1)

Figure 1.1: Global International Tourist Arrivals, 2012-2023 (in Million)



Source: *UNWTO Barometer 2024 (January Issue)*

Regional analysis reveals that the Middle East led the strong global tourism recovery, surpassing pre-pandemic levels by an impressive 22 percent. Europe, the world's most visited region, recovered 94 percent of its pre-pandemic activity. Africa achieved a remarkable 96 percent recovery, reflecting increased interest in its diverse destinations. The Americas reached 90 percent of pre-pandemic levels, while the Asia-Pacific region displayed mixed outcomes. South Asia experienced a significant rebound due to the reopening of several destinations, whereas North-East Asia saw a more gradual recovery. (Table 1.1)

Table 1.1: Global International Tourist Arrivals by Regions, 2019-2023

Region	International Arrivals (Millions)					Recovery from 2019 (%)
	2019	2020	2021	2022	2023	
World	1,462	407	458	960	1,286	88.0
Europe	742	240	301	597	700	94.3
East Asia and the Pacific	360	59	25	92	233	64.8
Americas	219	70	82	157	198	90.5
Africa	69	19	20	48	66	96.2
Middle East	71	19	30	68	87	122.2

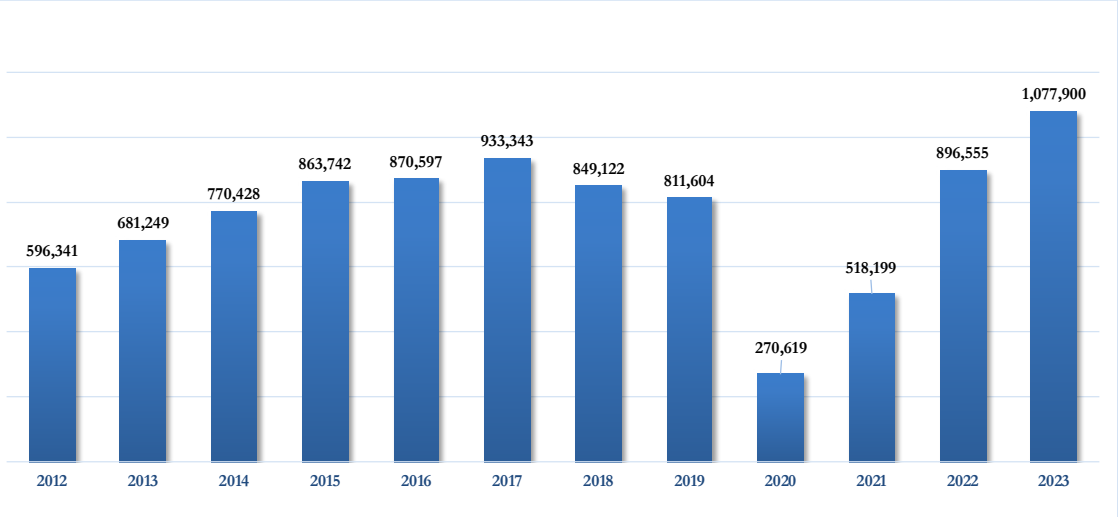
Source: *UNWTO Barometer 2024 (January Issue)*

1.2 TOURISM DEVELOPMENTS IN ETHIOPIA

1.2.1 Inbound Tourism

Ethiopia has also demonstrated impressive performance, with its tourism sector experiencing a significant rebound, reflected in a notable 32.82 percent increase in international visitor arrivals—from 811,604 in 2019 to a record high of 1,077,900 in 2023. The outlook for 2024 is promising, with continued growth anticipated, driven by ongoing government initiatives to position Ethiopia as a premier tourism destination. These efforts encompass destination development, rehabilitation, and strategic promotional activities (Figure 1.2).

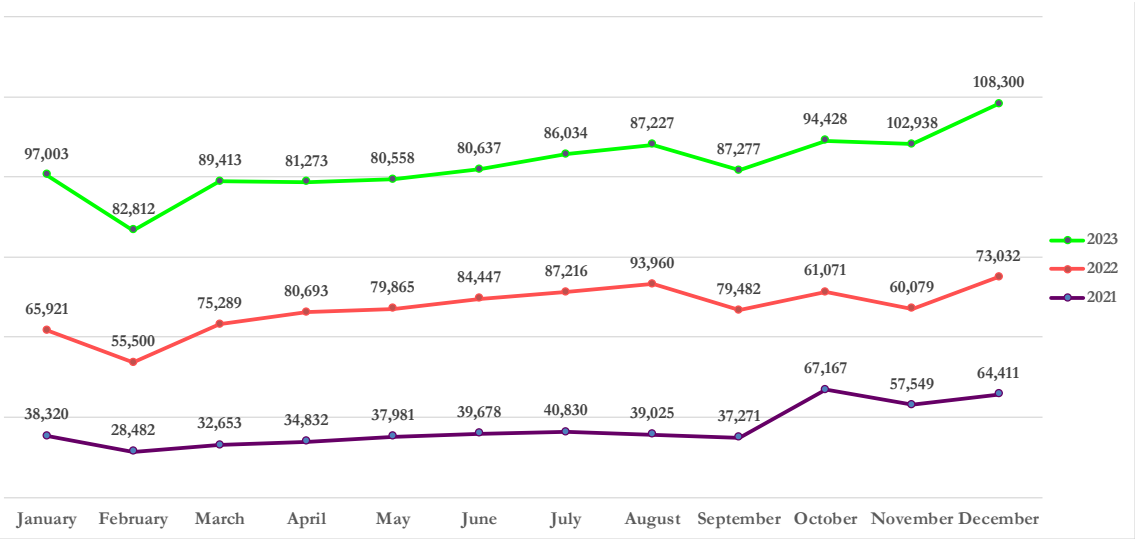
Figure 1.2: International Tourist Arrivals, 2012-2023



Source: *ICS, MoT, 2024*

Tourist arrivals in Ethiopia in 2023 followed a generally even distribution throughout the year, indicating a balanced seasonal pattern. The fourth quarter, particularly November and December, saw the highest influx of visitors. The first and third quarters represented the shoulder seasons, with steady yet moderate tourist numbers observed in January, February, March, July, and August. In contrast, the second quarter, particularly April, May, and June, marked the low season, with the fewest arrivals compared to the rest of the year (Figure 1.3).

Figure 1.3: Monthly International Tourist Arrivals, 2023



Source: *MoT, 2024*

Overall, international tourist arrivals to Ethiopia between 2021 and 2023 were stable across most regions. However, there were significant exceptions: arrivals from the Americas saw a decline, while those from Africa showed a steady increase (Table 1.2).

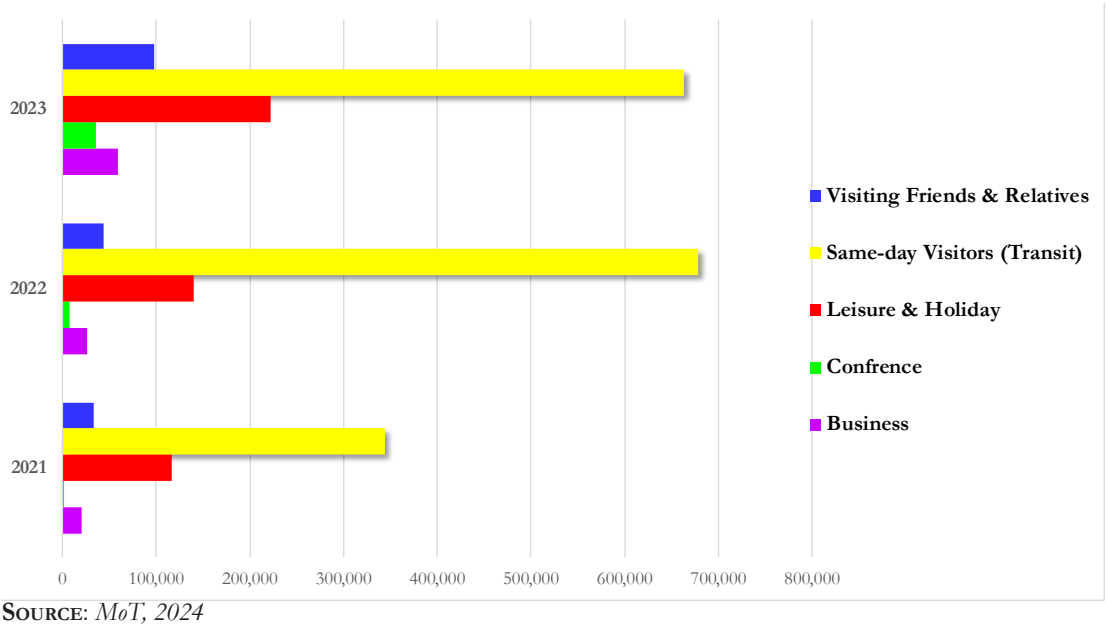
Table 1.2: International Tourist Arrivals by Regions, 2021-2023

Country of Residence	2021		2022		2023	
	Count	%	Count	%	Count	%
Africa	341,708	65.94	644,861	71.93	827,337	76.87
Americas	68,113	13.14	73,471	8.19	60,836	5.65
East Asia and The Pacific	27,071	5.22	44,995	5.02	35,431	3.29
Europe	56,431	10.89	91,758	10.23	80,646	7.49
Middle East	10,324	1.99	10,513	1.17	11,519	1.07
South Asia	14,552	2.81	30,957	3.45	60,528	5.62

Source: *ICS, MoT, 2024*

Between 2021 and 2023, international tourist arrivals to Ethiopia followed a stable trend across most purposes of visit, with same-day visitors consistently accounting for the largest proportion of total arrivals, as illustrated in Figure 1.4.

FIGURE 1.4: INTERNATIONAL TOURIST ARRIVALS BY PURPOSE OF VISIT, 2021-2023



SOURCE: *MoT, 2024*

Between 2021 and 2023, international arrivals to Ethiopia showed variability, with notable fluctuations in the top source markets each year, as reflected in the changing rankings of the top ten markets (Table 1.3).

TABLE 1.3: TOP 10 SOURCE MARKETS, 2021-2023

2021		2022		2023	
COUNTRY	**%**	**COUNTRY**	**%**	**COUNTRY**	**%**
Djibouti	17.56	Sudan	15.69	Sudan	12.39
Ghana	14.62	Nigeria	10.05	Nigeria	10.12
Canada	10.85	USA	5.54	Kenya	6.00
Sudan	9.20	Kenya	4.03	India	5.15
Austria	3.90	India	3.28	Canada	3.57
Malawi	3.54	Zimbabwe	2.94	Congo, DRC	3.46
China	3.48	South Africa	2.39	Cameroon	3.23
Denmark	3.46	United Kingdom	2.35	Djibouti	2.68
Tanzania	3.39	Ghana	2.27	Burundi	2.55
Japan	3.20	China	2.08	Tanzania	2.40

SOURCE: *ICS, MoT, 2024*

1.2.2 Outbound Tourism

In 2023, 649,888 Ethiopians traveled abroad, with 59.82 percent being female and 40.18 percent male. Most travelers departed by air through Bole and Dire Dawa airports, while only 1.28 percent used land borders such as Dawale, Metema, Moyale, and the Ethio-Djibouti railway (Table 1.4).

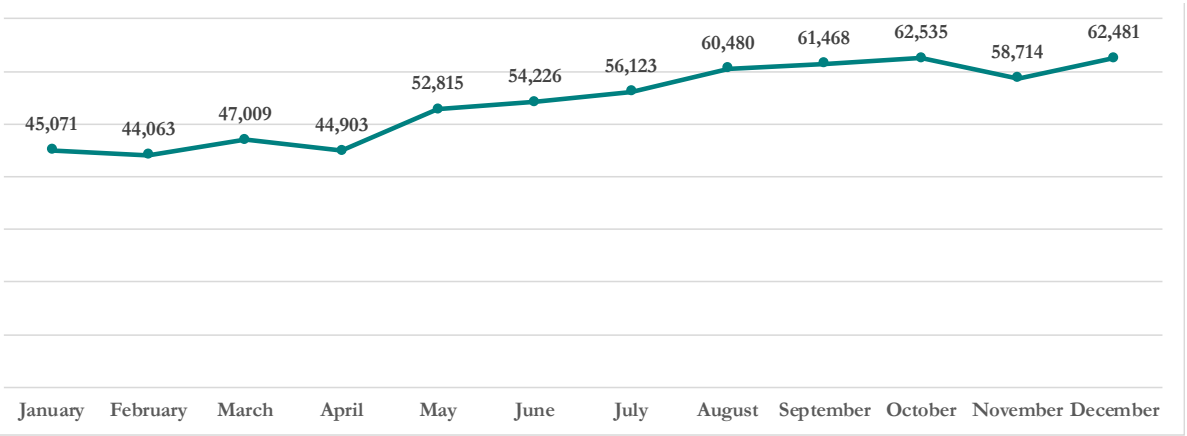
Table 1.4: Top 10 Destinations, 2023

Departure Point	Count	%
Bole Int'l Airport	635,892	97.85
Dawale	1,629	0.25
Dire Dawa Airport	5,664	0.87
Ethio-Djibouti Railway	629	0.10
Metema	67	0.01
Moyale	6,007	0.92
Total	**649,888**	**100.00**

Source: *ICS, MoT, 2024*

Monthly departure trends for Ethiopians in 2023 showed travel peaks in the latter half of the year. October recorded the highest number of departures, accounting for 9.62 percent of the total, followed closely by December at 9.61 percent and September at 9.46 percent. August also saw a significant volume, with 9.31 percent of total departures. In the earlier months, January and February recorded 6.94 percent and 6.78 percent of departures, respectively. Mid-year months, such as June and July, also showed strong figures, with 8.34 percent and 8.64 percent of departures, respectively (Figure 1.5).

Figure 1.5: Monthly International Departure for Ethiopians, 2023



Source: *ICS, MoT, 2024*

The top destinations for Ethiopians in 2023 were predominantly in the Middle East and Asia, with the United Arab Emirates and Saudi Arabia leading at 31.67 percent and 20.36 percent of total departures, respectively. Other significant destinations included Ireland (6.59 percent), Qatar (4.76 percent), and Kenya (4.32 percent). Collectively, these top ten destinations represented 81.18 percent of total departures (Table 1.5).

Table 1.5: Top 10 Destinations, 2023

Top 10 Destination	Count	%
UAE	199,409	31.67
Saudi Arabia	128,200	20.36
Ireland	41,501	6.59
Qatar	29,951	4.76
Kenya	27,213	4.32
Egypt	20,739	3.29
Turkey	18,452	2.93
China	14,883	2.36
South Africa	10,458	1.66
Thailand	10,372	1.65
India	10,018	1.59
Total	**511,196**	**81.18**

Source: *ICS, MoT, 2024*





- CHAPTER 2 -
METHODOLOGY

2.1 INTRODUCTION

The methodology for the 2024 International Tourism Survey was developed through a collaborative effort involving the Ministry of Tourism (MoT) Statistics Team, the Ministry of Planning and Development (MoPD) National Account Team, and the Ethiopian Statistics Service (ESS) Methodology Department. Key components of the methodology included the design of the sampling strategy, the development of survey instruments, the delineation of scope and coverage, the establishment of training programs, as well as detailed protocols for data collection and processing.

2.2 SCOPE OF THE SURVEY

The 2024 International Tourism Survey targeted two distinct respondent groups: departing international visitors (inbound tourists) and returning Ethiopians (outbound tourists) at Bole International Airport. An international visitor is defined as an individual who travels to a country other than their usual place of residence for a period not exceeding twelve months, with the primary purpose of their visit being non-remunerative within the destination country. This definition applies uniformly to both inbound and outbound tourists.

2.3 SAMPLE SIZE

The sample frame for the survey was constructed using the 2023 data on inbound and outbound tourism. For the inbound survey, a random sample of 1,671 respondents was interviewed, representing 82,812 international visitors departing from Ethiopia. Meanwhile, the outbound survey focused on 882 Ethiopian tourists returning from their travels abroad, representing a population of 44,063 returning citizens. Both samples were considered adequate to fulfill the survey's objectives, as confirmed by the technical team.

2.4 THE SAMPLE FRAME

The 2024 International Tourism Survey was constructed using data on inbound and outbound tourism for the year 2023. For the inbound survey, a random sample of 1,671 international visitors was selected, representing a broader population of 82,812 visitors departing from Ethiopia. In parallel, the outbound survey targeted 882 Ethiopian tourists returning from abroad, corresponding to a population of 44,063 returning citizens. The sample sizes for both inbound and outbound surveys were deemed statistically sufficient to meet the survey's objectives and ensure representativeness, as verified by the technical team.

2.5 DATA COLLECTION

Following the interviewer training, the data collection exercise was conducted throughout February 2024 at the exit and entry points of Bole International Airport. The data collection shifts were scheduled in accordance with the arrivals and departures of flight schedules. The MoT coordinated the fieldwork supervision in collaboration with the ESS and the MoPD. Supervisors played a crucial role in ensuring the quality and reliability of the data collected during the survey. They made regular visits to the data collection sites, conducting consistency checks to verify the accuracy and completeness of the questionnaires. Additionally, they provided on-the-spot feedback and support to interviewers, promptly addressing any issues or discrepancies. By checking compliance with established protocols and standards, supervisors helped maintain the integrity of the survey data and ensured the successful progress of the fieldwork.

2.6 QUESTIONNAIRES

The questionnaires for the 2024 International Tourism Survey were collaboratively developed by the Ministry of Tourism Statistics Team, the Ethiopian Statistics Services Methodology Department, and the Ministry of Planning and Development National Account Department, ensuring alignment with the Tourism Satellite Account and the data needs of key stakeholders. The final drafts were approved by the Ethiopian Tourism Satellite Account Committee.

To accommodate diverse international visitors, the Exit survey questionnaire was initially drafted in English and then translated into French, Italian, German, and Chinese. The Entry survey questionnaire was similarly prepared in English and translated into Amharic. Both questionnaires consisted of four main sections: visitor profiles, travel behavior, expenditure patterns, and visitor comments (Appendix A).



3.1 INTRODUCTION

This chapter, divided into two sections, presents a comprehensive summary of the key findings from both the Entry and Exit International Visitors Surveys conducted at Bole International Airport in February 2024.

The Entry Survey gathered detailed information from inbound visitors, representing a diverse group of travelers from all continents. This extensive data collection facilitates a thorough analysis of the characteristics and behaviors of tourists visiting Ethiopia. In contrast, the Exit Survey focused on collecting detailed information from Ethiopian tourists returning from their trips abroad.

Together, these surveys provide valuable insights into various aspects of international tourism in Ethiopia, covering the demographic profiles, travel behavior, and overall experiences of both inbound and outbound tourists. Alongside demographic and behavioral data, the surveys also examined length of stay and expenditure patterns, offering a comprehensive look at how tourists allocate their spending across categories such as accommodation, food and beverages, transportation, and entertainment.

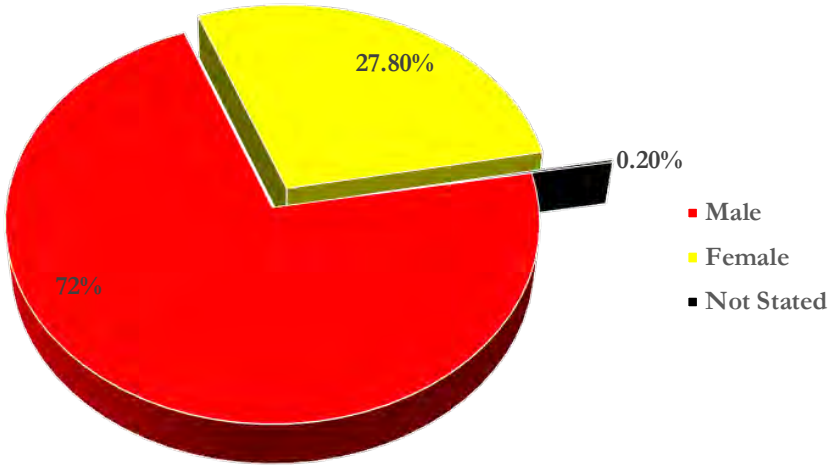
For inbound tourism, understanding these expenditure patterns is crucial for assessing the economic impact of tourism on the local economy and identifying opportunities to enhance the tourism experience while increasing visitor spending. Regarding outbound tourism, understanding the purpose of travel, length of stay, and expenditure patterns is essential for evaluating the economic impact of foreign exchange spending. By analyzing the motivations of Ethiopian tourists, this information becomes critical for developing strategies that can mitigate the effects of foreign exchange outflows and optimize the economic benefits of tourism.

3.2 EXIT SURVEY RESULTS AND FINDINGS

3.2.1 Sex of Respondents

The sex distribution of survey respondents showed that 72 percent of the total visitors interviewed were male, while 28 percent were female. The remaining percentage of respondents did not provide a response (Figure 3.1).

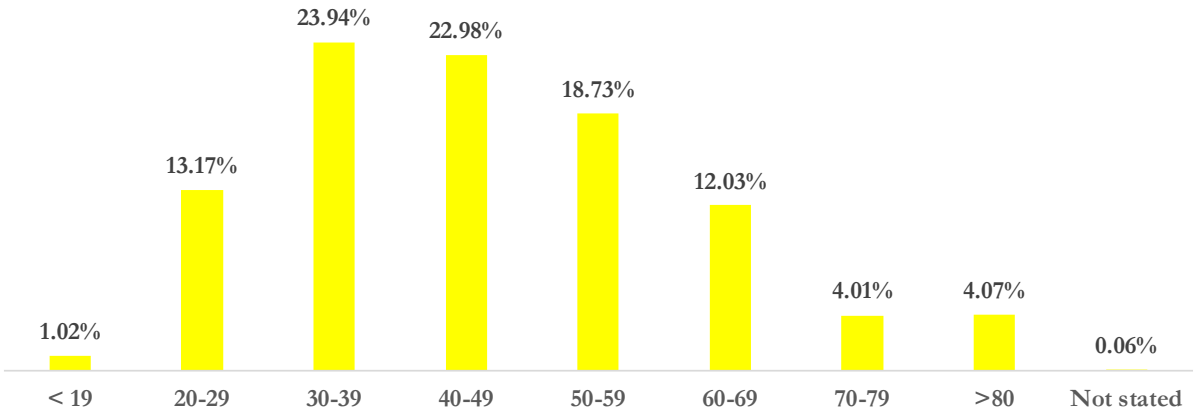
Figure 3.1 Sex of Respondents



3.2.2 Age of Respondents

The age distribution of visitors demonstrated a wide range, with the largest proportion (23.94 percent) in the 30-39 age group, followed closely by 22.98 percent in the 40-49 group. Visitors aged 50-59 accounted for 18.73 percent, while 13.17 percent were in the 20-29 group, highlighting a significant presence of both younger and middle-aged tourists. The 60-69 age group represented 12.03 percent, and older visitors made up smaller portions, with 4.01 percent in the 70-79 group and 4.07 percent aged 80 or above. Visitors under 19 years were a minority at 1.02 percent (Figure 3.2).

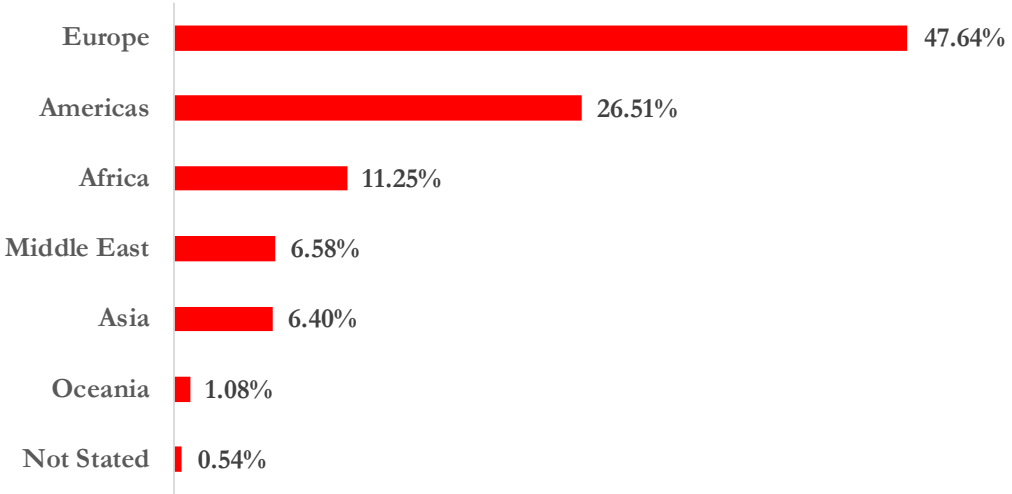
FIGURE 3.2 AGE OF RESPONDENTS



3.2.3 COUNTRY OF RESIDENCE OF RESPONDENTS

Considering the country of residence of respondents, the data reveals a broad geographic diversity among visitors. The majority, 47.64 percent, came from Europe, followed by 26.51 percent from the Americas. African visitors made up 11.25 percent, while those from the Middle East represented 6.58 percent. Visitors from Asia accounted for 6.40 percent, and those from Oceania were 1.08 percent. (Figure 3.3)

FIGURE 3.3 DISTRIBUTION BY REGION OF RESIDENCE



3.2.4 Occupation and Education of Respondents

In terms of occupation level, a substantial majority of the respondents, 63.3 percent, were professionals. The next largest group, comprising 22.1 percent of respondents, were businessmen and businesswomen. Other mentioned occupations included retirees, farmers, self-employed individuals, housewives, and the unemployed. When examining the education level of the respondents, a significant majority, 69.8 percent, held a university degree or higher. The next largest group, making up 17.4 percent of respondents, had attained a college diploma. (Table 3.1).

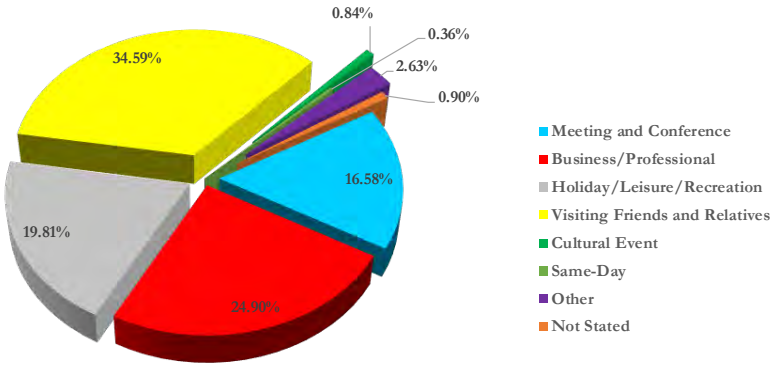
Table 3.1 Occupation and Education of Respondents

		Frequency	Percent
Occupation	Professional	1,057	63.3
	Business	370	22.1
	Students	90	5.4
	Other	124	7.4
	Not Stated	30	1.8
	Total	**1,671**	**100.0**
Education	Primary	22	1.3
	Secondary	158	9.5
	College Diploma	291	17.4
	University Degree & Above	1,166	69.8
	Other	14	0.8
	Not Stated	20	1.2
	Total	**1,671**	**100.0**

3.2.5 Main Purpose of Visit of Respondents

The primary purposes of visits to Ethiopia reflected a diverse range of motivations: 34.59 percent of respondents traveled to visit friends and relatives, 24.9 percent for business, 19.81 percent for holiday and leisure, and 16.59 percent for meetings and conferences. The remaining respondents were categorized under same-day visits, other purposes, or did not specify their reason for travel (Figure 3.4).

Figure 3.4 Main Purpose of Visit of Respondents



3.2.6 Travel Party

The survey indicated that solo travelers constituted the majority, representing 68.1 percent of respondents. Travelers accompanied by friends accounted for 13.2 percent, while couples made up 10.1 percent. Families with children represented a smaller segment, comprising only 4.4 percent of visitors, as outlined in Table 3.2.

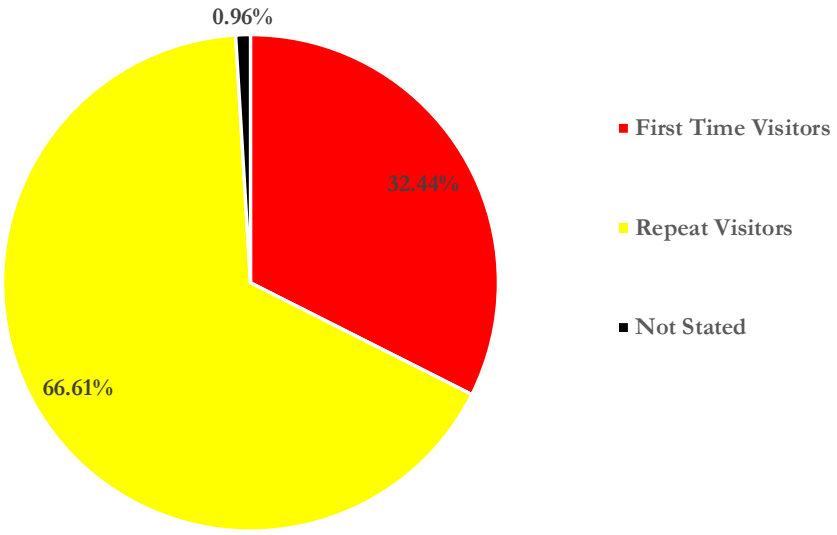
Table 3.2 Travel Party

	Frequency	Percent
Traveling Alone	1138	68.10
Traveling with Spouse/partner	168	10.1
Traveling with Children	51	3.1
Traveling with Spouse and Children	22	1.3
Traveling with Friends and Relatives	220	13.2
Traveling with Parents	28	1.7
Not Stated	44	2.6
Total	**1,671**	**100.0**

3.2.7 History of Visit

The majority of visitors surveyed were repeat visitors, with more than half having been to the country before. This trend aligns with findings from the 2019 survey, indicating a consistent pattern of returning tourists over the years. The data underscores Ethiopia's strong ability to retain visitors. (Figure. 3.5).

Figure 3.5 History of Visit



3.2.8 Source of Information

The survey revealed that 34 percent of visitors learned about Ethiopia through friends and relatives, making it the primary source of information. In contrast, only 6.4 percent relied on travel agents and tour operators, while 6.6 percent discovered Ethiopia via social media. Other cited sources included the Ethiopian Diaspora community, Ethiopian work colleagues abroad, educational institutions, neighbors of Ethiopian origin, as well as advertising, books, airlines, and churches. (Table 3.3).

Table 3.3 Source of Information

Source of Information	Frequency	Percent
Travel Agents	106	6.4
Tour Operators	48	2.9
Friends/Relatives	562	33.9
Trade Fair/Expo	42	2.5
Social-Media	109	6.6
In-flight Magazines	15	0.9
Ethiopian Foreign Missions	105	6.3
TV/ Radio Station	45	2.7
Newspapers/ magazines	65	3.9
Other Sources	561	33.8
Total	**1,658**	**100.0**

3.2.9 Main Attraction

Respondents across various purpose categories identified a range of motivations for visiting Ethiopia. Cultural attractions were the most prominent, cited by 20.4 percent. Visiting friends and relatives motivated 12.5 percent, while 12 percent were drawn by the opportunity to experience local cuisine. Additional motivations grouped under "Other" included coffee tourism, biodiversity, music, Pan-Africanism, work and investment opportunities, charity, adoption, and fishing and hunting (Table 3.4).

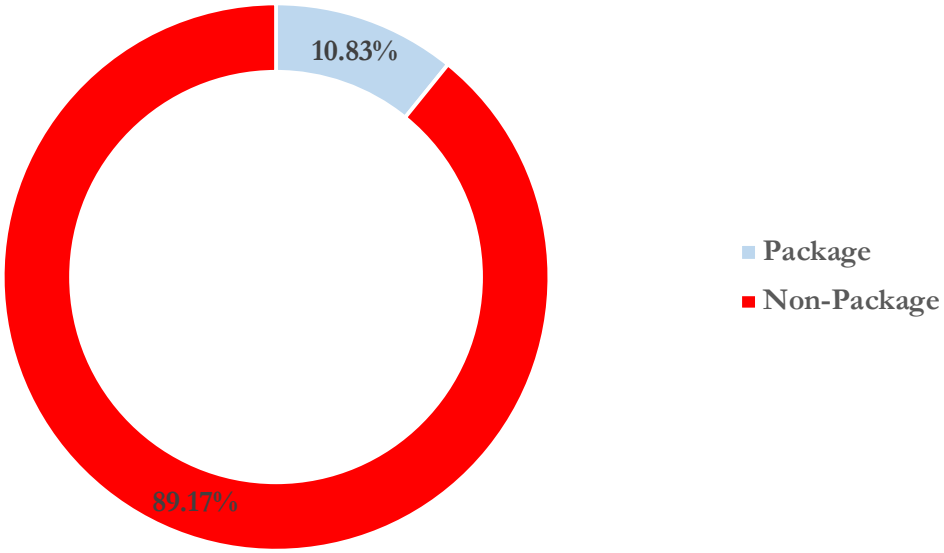
Table 3.4 Main Attraction

Main Point of Attraction	Frequency	Percent
Ethiopian Culture	950	20.4
Ethiopian Cuisine	556	12.0
Religious Event	255	5.5
To Visit Friends/Relatives	581	12.5
Historical Attractions	458	9.9
Museum	216	4.6
Educational Trip	92	2.0
Diversity of Attraction	125	2.7
Climate	385	8.3
Wildlife	177	3.8
Landscape	334	7.2
Curiosity	131	2.8
Value for Money	63	1.4
Safety and Security	43	0.9
Other Attraction	280	6.0
Total	**4,646**	**100.0**

3.2.10 Travel Arrangement

The survey findings highlight a clear preference for non-package travel among visitors to Ethiopia. A substantial majority, 89.17 percent, arranged their trips independently, while only 10.83 percent chose package tour arrangements (Figure 3.6).

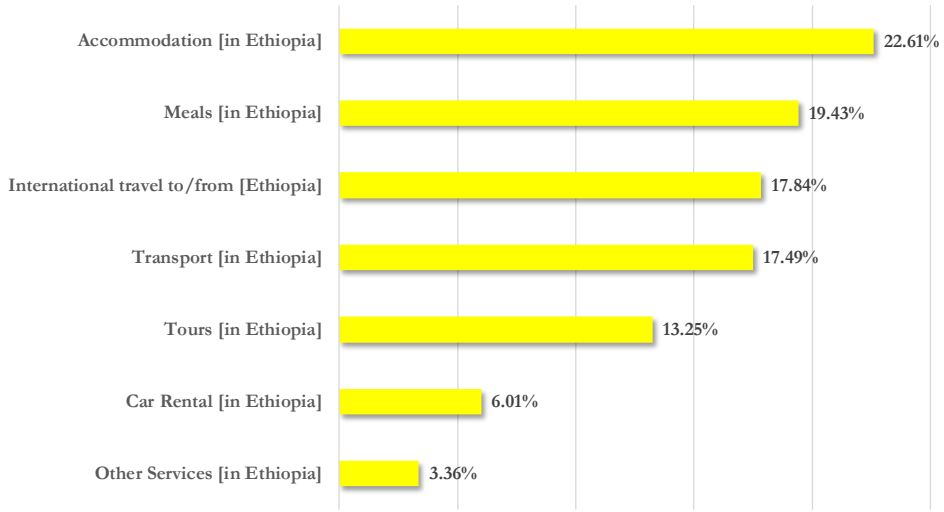
Figure 3.6 Travel Arrangement



3.2.11 Package Items/ Service Provided

Among the items included in package tours, accommodation services were the most popular, chosen by 22.6 percent of respondents, followed by meal services at 19.4 percent and international travel to and from Ethiopia at 17.8 percent. Other significant items mentioned were park entrance, guide fees, and domestic flights (Figure. 3.7)

Figure 3.7 Package Items or Tourist Services Provided



3.2.12 Length of Stay/ Nights

This section analyzes visitors' length of stay, which varied according to factors such as country of origin, purpose of visit, travel arrangements, and destinations within Ethiopia. The 1,671 respondents collectively spent a total of 28,876 days in the country. Tables 3.6 to 3.10 offer detailed breakdowns, providing deeper insights into the distribution of stay durations across these categories for a thorough understanding. (Table 3.6)

Table 3.6 Length of Stay/Nights: Overall Average

Length of Stay/Nights (Weighted)	
Mean	16.71
Median	9.69
Std. Deviation	3.87
Mode	20.84
Minimum	0.00
Maximum	290.57

3.2.12.1 Regional Distribution by Length of Stay/nights

The average length of stay, or the number of nights spent at a destination by visitors, is a crucial indicator in the tourism industry. Tourism earnings are directly or indirectly tied to the duration of visitors' stays. Therefore, understanding the distribution of average nights spent across various regions within the country is essential. A detailed breakdown of this data is provided in Table 3.7.

Table 3.7 Regional Distribution By Length of Stay/nights

Region	Nights/ Days	Percent
Addis Ababa	22,334	77.34
Afar	309	1.07
Amhara	1,051	3.64
Benishangul	76	0.26
Dire-Dawa	332	1.15
Gambella	160	0.55
Harar	116	0.40
Oromia	1,508	5.22
Sidama	868	3.01
SNNPR	977	3.38
Somalia	216	0.75
Tigray	929	3.22
Total	**28,876**	**100.0**

3.2.12.2 Length of Stay/nights by Trip Arrangement

The analysis of the length of stay by trip arrangement reveals that visitors who came on package trips had an average stay of 15.91 days. On the other hand, travelers who chose non-package trips enjoyed a slightly longer average stay of 16.81 days. (Table 3.8)

Table 3.8 Average Length of Stay/nights by Trip Arrangement

Trip Arrangement	Length of Stay/Nights (weighted)	
Package	Mean	15.91
	Median	7.75
	Minimum	0.00
	Maximum	174.34
Non-Package	Mean	16.81
	Median	9.69
	Minimum	0.00
	Maximum	290.57

3.2.12.3 Length Of Stay/Nights by Region

The average length of stay varied significantly by region. Visitors from Oceania had the longest average stay, at 23.30 nights, followed by those from the Americas, with an average of 21.41 nights. Visitors from the Middle East stayed for an average of 17.13 nights, while Europeans averaged 16.05 nights. Tourists from unspecified regions stayed for an average of 15.66 nights. Visitors from Asia stayed for 11.83 nights, and those from Africa had the shortest average stay, at 10.55 nights (Table 3.9).

Table 3.9 Average Length of Stay/Nights By Country of Residence Categorized by Regions (weighted)

Region	Length Of Stay/ Nights (Weighted)	
Africa	Mean	10.55
	Median	4.84
	Minimum	0.00
	Maximum	87.17
Americas	Mean	21.41
	Median	13.56
	Minimum	0.00
	Maximum	175.31
Europe	Mean	16.05
	Median	9.69
	Minimum	0.00
	Maximum	290.57
Middle East	Mean	17.13
	Median	6.78
	Minimum	0.97
	Maximum	116.23
Asia	Mean	11.83
	Median	5.81
	Minimum	0.00
	Maximum	87.17
Oceania	Mean	23.30
	Median	16.47
	Minimum	0.97
	Maximum	123.01
Not Stated	Mean	15.66
	Median	4.84
	Minimum	2.91
	Maximum	58.11

3.2.12.4 Length of Stay/Nights by Purpose of Visit

Analyzing the average length of stay based on the purpose of visit, visitors attending meetings and conferences stayed for an average of 7.35 nights, while business travelers stayed longer at 14.23 nights. Holiday and leisure tourists had an average stay of 15.71 nights, and those visiting friends and relatives stayed the longest, with an average of 19.37 nights. Cultural event attendees stayed for an average of 11.90 nights, while visitors with other purposes had the shortest stays, averaging 5.57 nights (Table 3.10)

Table 3.10 Average Length of Stay by Purpose of Visit (weighted)

Region	Length of Stay/ Nights	
Meeting and Conference	Mean	7.35
	Median	4.84
	Minimum	0.00
	Maximum	109.45
Business/Professional	Mean	14.23
	Median	6.78
	Minimum	0.00
	Maximum	290.57
Holiday/Leisure/Recreation	Mean	15.71
	Median	10.65
	Minimum	0.00
	Maximum	175.31
Visiting Friends and Relatives	Mean	25.13
	Median	19.37
	Minimum	0.00
	Maximum	174.34
Cultural Event	Mean	11.90
	Median	9.20
	Minimum	0.97
	Maximum	29.06
Other	Mean	5.57
	Median	3.39
	Minimum	0.00
	Maximum	29.06
Not Stated	Mean	30.03
	Median	30.03
	Minimum	1.94
	Maximum	58.11

3.2.13 Visitors' Expenditure

The total expenditure per trip was calculated to be USD 2,783.65, representing the average amount spent by international visitors during their stay in Ethiopia. (Table 3.11)

Table 3.11 Visitors' Expenditure: Total Average

Total Expenditure (weighted)	USD
Mean	2,783.65
Median	1,545.52
Minimum	0.00
Maximum	49,927.30

3.2.13.1 Average Length of Stay/ Nights by Trip Arrangement

When analyzing expenditure by travel arrangement, it was found that visitors who organized their trips independently had the highest average spending. On average, these self-arranged travelers spent approximately USD 4,642.42 during their trip. (Table 3.12)

Table 3.12 Average Expenditure by Trip Arrangement

Trip Arrangement	Average Expenditure (weighted)	USD
Package	Mean	3,018.06
	Median	1,898.56
	Minimum	0.00
	Maximum	22,641.82
Non-Package	Mean	2,755.17
	Median	1,500.51
	Minimum	0.00
	Maximum	49,927.30

3.2.13.2 Distribution Expenditure by Items

The breakdown of total expenditure across various standard categories reveals that accommodation services accounted for the largest share at 23.43 percent. Air transport services followed at 17.93 percent, while food and drink services contributed 15.10 percent. Cultural clothing and footwear represented 11.55 percent of the total expenditure, with road transport services accounting for 5.92 percent. Souvenirs and cultural food and restaurant services comprised 3.96 percent and 2.43 percent, respectively. (Table 3.13)

Table 3.13 Distribution Expenditure by Items

Expenditure Items	USD	Percent
Accommodation Services	1,124,927.27	23.43
Accommodation For Vacation Homes	89,827.68	1.87
Food And Drinks Services	725,024.47	15.10
Air Transport Services	860,508.72	17.93
Road Transport Services	284,202.17	5.92
Train and Railway Services	829.00	0.02
Water Transport/Canoe Services	1,822.96	0.04
Transport Equipment Rentals Services	35,953.44	0.75
Sport, Recreational and Entertainment Services	59,364.60	1.24
Travel Agency Reservation Services	57,032.63	1.19
Cultural Services	34,780.83	0.72
Event Services	35,337.27	0.74
Capital Purchase	56,569.99	1.18
Valuables	7,132.41	0.15
Other	223,674.51	4.66
Expenditure for Leisure Related Activities		
Cultural Cloths And Shoes	554,631.90	11.55
Souvenirs	189,885.41	3.96
Handicrafts	42,255.20	0.88
Leather Products	41,584.79	0.87
Paintings	12,970.54	0.27
Cultural Tours	15,927.81	0.33
Cultural Shows And Festivals	11,168.03	0.23
Cultural Food And Restaurants	116,841.17	2.43
Traditional Medicine	26,922.33	0.56
Archaeological Historical	26,670.44	0.56
Bird Watching	1,000.00	0.02
Hot Air Ballooning	0.00	0.00
Hiking Trekking	6,030.67	0.13
Hunting	200.00	0.00
Gifts For Hosts	94,288.92	1.96
Other	63,176.41	1.32
Total	**4,800,541.56**	**100.0**

3.2.13.3 Average Daily Expenditure

On average, visitors to Ethiopia spent 16.71 days in the country, with a daily expenditure of USD 166.66. However, significant variations in daily expenditure were observed based on factors such as region of origin, purpose of visit, and trip arrangements, reflecting the diverse spending behaviors of respondents. (Table 3.14)

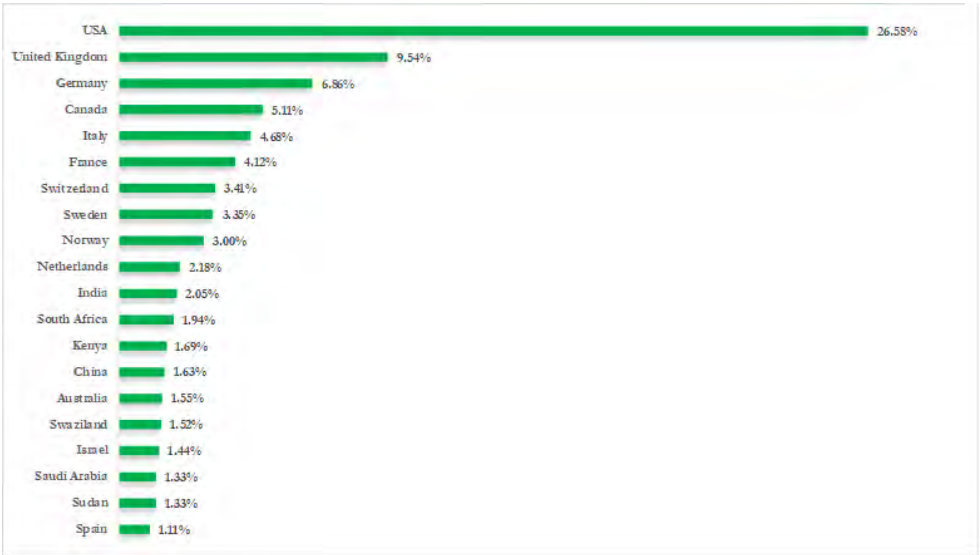
Table 3.14 Distribution Expenditure by Items

	Average Daily Expenditure USD (Weighted)
Region	
Africa	233.34
Americas	158.69
Europe	157.80
Middle East	153.74
Asia	237.91
Oceania	172.15
Not Stated	67.96
Purpose of Visit	
Meeting and Conference	294.99
Business/Professional	191.54
Holiday/Leisure/Recreation	173.21
Visiting Friends and Relatives	133.75
Cultural Event	90.90
Other	319.32
Not Stated	44.52
Trip Arrangement	
Package	190.80
Independently	163.90

3.2.13.4 Top 20 Countries by Expenditure

The graph below illustrates the top 20 countries by expenditure, which collectively account for 84.82 percent of the total global expenditure. Leading this group is the United States, with an impressive 26 percent share of the total expenditure, amounting to USD1,236,140.26. Following the USA, the United Kingdom holds a 9.54 percent share, Germany ranks third with 6.86 percent, while Canada stands at fourth with 5.11 percent. Italy rounds out the top five with a 4.68 percent share. (Figure 3.8)

Figure 3.8 Top 20 Countries by Expenditure



3.2.13.5 Expenditure by Purpose of Visit

When examining average expenditure by travel party, visitors who traveled with friends and relatives emerged as the highest spenders. Their overall weighted average expenditure was an impressive USD 1,358.05. This data highlights the economic significance of this visitor segment and suggests potential areas for targeted tourism marketing (Table 3.16).

Table 3.16 Expenditure by Purpose of Visit

Purpose of Visit		USD
Meeting and Conference	Mean	2,169.37
	Median	1,259.12
	Minimum	0.00
	Maximum	20,625.70
Business/Professional	Mean	2,725.22
	Median	1,552.81
	Minimum	0.00
	Maximum	36,206.13
Holiday/Leisure/Recreation	Mean	2,721.38
	Median	1,362.60
	Minimum	0.00
	Maximum	33,492.25
Visiting Friends and Relatives	Mean	3,361.23
	Median	1,937.11
	Minimum	0.00
	Maximum	49,927.30
Cultural Event	Mean	1,081.68
	Median	492.83
	Minimum	0.00
	Maximum	4,358.50
Other	Mean	1,778.36
	Median	992.77
	Minimum	0.00
	Maximum	9,409.13
Excursionist	Mean	932.67
	Median	313.62
	Minimum	0.00
	Maximum	6,965.85
Not Stated	Mean	1,336.61
	Median	1,336.61
	Minimum	803.90
	Maximum	1,869.31

3.2.13.6 Expenditure by Country of Residence

Examining total expenditure by region of residence reveals that visitors from Oceania were the highest spenders, with a substantial overall weighted average expenditure of USD 4,010.93. Following them were visitors from the Americas and Asia, who spent USD 3,397.11 and USD 2,788.85, respectively, while European visitors averaged USD 2,532.70. Tourists from Africa spent an average of USD 2,462.01. In terms of maximum total expenditure by region, the Americas and Europe led with total expenditures of USD 49,927.30 and USD 36,206.13, respectively (Table 3.17).

Table 3.17 Expenditure by Country of Residence (Weighted)

Region		USD
Africa	Mean	2,462.01
	Median	1,164.84
	Minimum	0.00
	Maximum	32,384.94
Americas	Mean	3,397.11
	Median	1,966.17
	Minimum	0.00
	Maximum	49,927.30
Europe	Mean	2,532.70
	Median	1,528.16
	Minimum	0.00
	Maximum	36,206.13
Middle East	Mean	2,632.95
	Median	1,308.93
	Minimum	0.00
	Maximum	23,920.33
Asia	Mean	2,788.85
	Median	1,260.63
	Minimum	0.00
	Maximum	38,742.21
Oceania	Mean	4,010.93
	Median	2,384.12
	Minimum	51.31
	Maximum	11,360.67
Not Stated	Mean	826.49
	Median	774.84
	Minimum	19.37
	Maximum	1,869.31

3.2.14 Evaluation of Tourist Related Services

The following is an evaluation of tourist-related services, rated from excellent to poor. This assessment highlights key areas of strength while identifying opportunities for improvement to enhance the overall visitor experience. (Table 3.18)

Table 3.18 Evaluation of Tourist Related Services

Item	Excellent	Very Good	Good	Satisfactory	Poor	Not Evaluated	Total
Safety and Security	15.4%	26.9%	28.4%	12.9%	10.9%	94.5%	100%
Accommodation Services	25.4%	31.4%	29.0%	5.4%	1.5%	92.7%	100%
Food and Beverages Services	27.5%	33.8%	28.2%	5.4%	1.1%	3.9%	100%
Transportation Services	15	26.4%	33.2%	11.1%	5.5%	8.7%	100%
Internet and Telephone Services	12.8%	23.0%	27.5%	16.9%	12.1%	7.7%	100%
Foreign Exchange Services	11.3%	18.6%	29.4%	8.0%	5.3%	27.4%	100%
Conference and Exhibition Services	9.8%	13.5%	11.5%	2.7%	0.4%	62.2%	100%
Shopping Centers: Souvenirs, Handicrafts	12.3%	21.4%	21.0%	4.6%	1.4%	39.3%	100%
Historical Attractions	18.2%	18.1%	12.3%	2.2%	0.3%	49.0%	100%
Nature and Wildlife Attractions	16.4%	14.0%	8.2%	2.0%	0.5%	58.8%	100%
Cultural Attractions	19.9%	19.2%	10.2%	1.4%	0.4%	49.0%	100%
Language Capabilities	14.6%	26.7%	27.6%	10.7%	3.5%	16.9%	100%
Tour Operators Services	7.8%	8.0%	6.7%	1.7%	0.4%	75.5%	100%
Hygiene and Sanitation	9.4%	19.7%	33.7%	19.4%	9.4%	8.3%	100%

3.2.15 Rating Experience

The majority of respondents rated their experience in Ethiopia positively. Specifically, 39.0 percent rated their experience as very satisfied, and 45.9 percent were satisfied. A smaller group, 12.5 percent, rated their experience as fair. Only a few visitors were dissatisfied, with 1.9 percent indicating dissatisfaction and 0.2 percent very dissatisfied. Additionally, 0.5 percent of respondents did not provide a rating of their satisfaction. (Table 3.19)

Table 3.19 Rating Experience

Item	Frequency	Percent
Very Satisfied	651	39.0
Satisfied	767	45.9
Fair	209	12.5
Dissatisfied	31	1.9
Very Dissatisfied	4	0.2
Not Stated	9	0.5
Total	**1,671**	**100.0**

3.2.16 Visit Ethiopia Again

The table below reveals that a significant majority of respondents (89.8 percent) expressed a strong interest in visiting Ethiopia again, aligning with the overall sentiment regarding their satisfaction with the experience. Only 1.5 percent indicated they would not return, while 8.1 percent were uncertain, responding with 'maybe.' Additionally, 0.5 percent of respondents did not provide a clear preference. This high level of potential return visitation underscores the positive reception of the destination. (Table 3.20)

Table 3.20 Visit Ethiopia Again

Item	Frequency	Percent
Yes	1,501	89.8
No	25	1.5
Maybe	136	8.1
Not Stated	9	0.5
Total	**1,671**	**100.0**

3.2.17 Write on Social Media About Ethiopia

In terms of sharing their experiences on social media, visitors had mixed responses. About 36.8 percent of respondents indicated they would write about Ethiopia on social media, while 40.8 percent said they would not. Another 20.6 percent were unsure, responding with "maybe," and 1.8 percent did not state their preference. This data reflects the varying levels of social media engagement among visitors.(Table 3.21)

Table 3.21 Write on Social Media About Ethiopia

Item	Frequency	Percent
Yes	615	36.8
No	682	40.8
Maybe	344	20.6
Not Stated	30	1.8
Total	**1,671**	**100.0**

3.2.18 Recommend Ethiopia to Others

A significant majority of respondents (89.3 percent) indicated they would recommend Ethiopia to others. A small percentage, 2.8 percent, said they would not, while 7.1 percent were uncertain, responding with "maybe." Additionally, 0.9 percent did not state their preference. This suggests that most visitors had a positive experience and would encourage others to visit Ethiopia. (Table 3.22)

Table 3.22 Recommend Ethiopia to Others

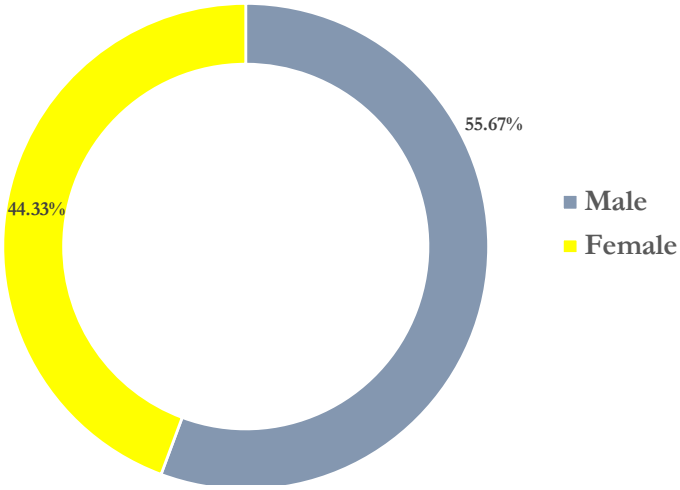
Item	Frequency	Percent
Yes	1,492	89.3
No	46	2.8
Maybe	118	7.1
Not Stated	15	0.9
Total	**1,671**	**100.0**

3.3 ENTRY SURVEY FINDINGS AND RESULTS (OUTBOUND)

3.3.1 Sex of respondents

When examining the demographics of the interviewed Ethiopian tourists, a significant proportion, 55.67 percent were male. In comparison, 44.33 percent were female. (Figure 3.9)

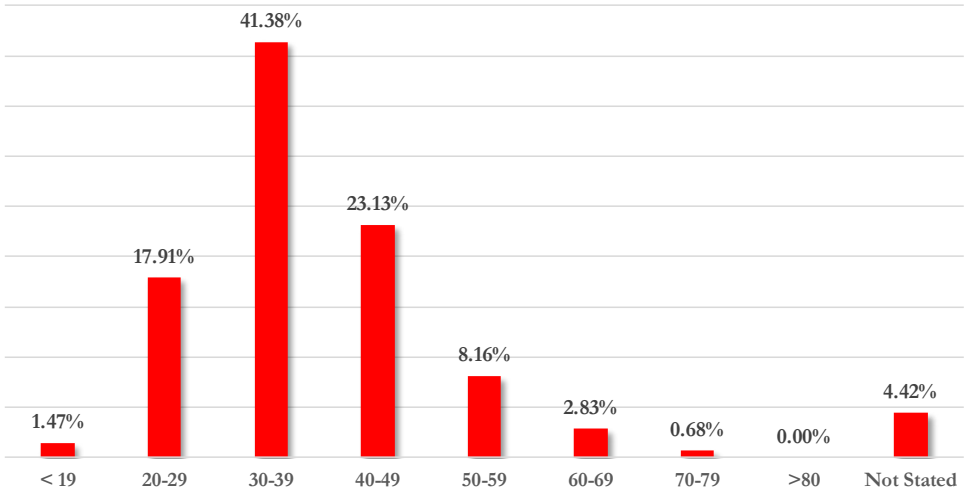
Figure 3.9 Sex of Respondents



3.3.2 Age of Respondents

According to the survey findings, the largest segment of outbound visitors were aged between 30 and 39 years old, followed by those aged 40-49 and 20-29. Collectively, these age groups represented nearly 83 percent of the Ethiopian visitors interviewed. In contrast, the percentage of visitors below 18 years old and those aged 69 years and above accounted for less than 2 percent of the total outbound visitors interviewed. (Figure 3.10).

Figure 3.10 Age of Respondents



3.3.3 Occupation and Education of Respondents

In terms of occupational levels, a significant portion of the respondents, 46.15 percent, were professionals. This indicates a strong representation of skilled workers within the surveyed group. The next largest group, accounting for 29.48 percent of respondents, consisted of businessmen and businesswomen. Additionally, those who chose the "Others" category comprised a diverse set of occupations, including homemakers retirees, religious leaders, athletes, self-employed individuals, farmers, artists, and the unemployed. (Table 3.23)

Table 3.23 Occupation And Education of Respondents

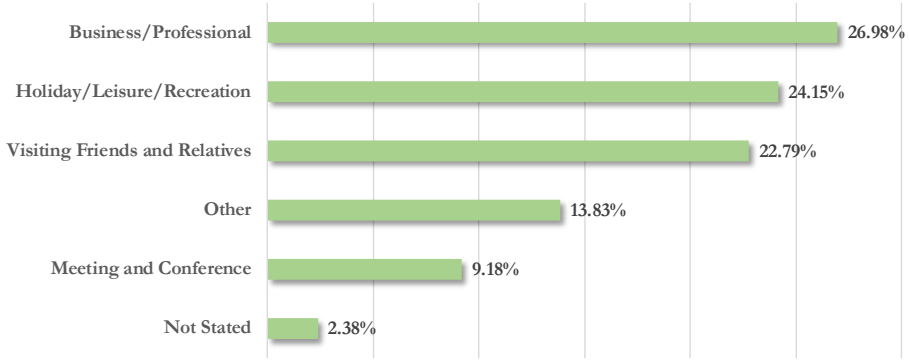
		Frequency	Percent
Occupation	Professional	407	46.15
	Business	260	29.48
	Students	42	4.76
	Other	142	16.10
	Not Stated	31	3.51
	Total	**882**	**100.00**
Education	Primary	44	4.99%
	Secondary	96	10.88%
	College Diploma	146	16.55%
	University Degree & Above	577	65.42%
	Other	19	2.15%
	Total	**882**	**100.00**

When examining the education levels of the respondents, a significant majority, 65.42 percent, held a university degree or higher, suggesting a highly educated group of tourists. The next largest group, comprising 16.55 percent of respondents, had attained a college diploma, further indicating a substantial level of education among Ethiopian tourists.

3.3.4 Main Purpose of Visit of Respondents

The survey findings reveal that the primary purposes for traveling outside Ethiopia were concentrated in three closely ranked categories. Business or professional purposes accounted for 26.98 percent of trips, making it the leading reason. Holiday, leisure, and recreation followed closely, comprising 24.15 percent of visits, while traveling to visit friends and relatives represented 22.79 percent. Additionally, 13.83 percent of respondents cited other reasons, including medical purposes, education, religious pilgrimages, training and workshops, exhibitions, and sports events. Notably, meetings and conferences accounted for a smaller share of outbound travel compared to these major categories. (Figure 3.11)

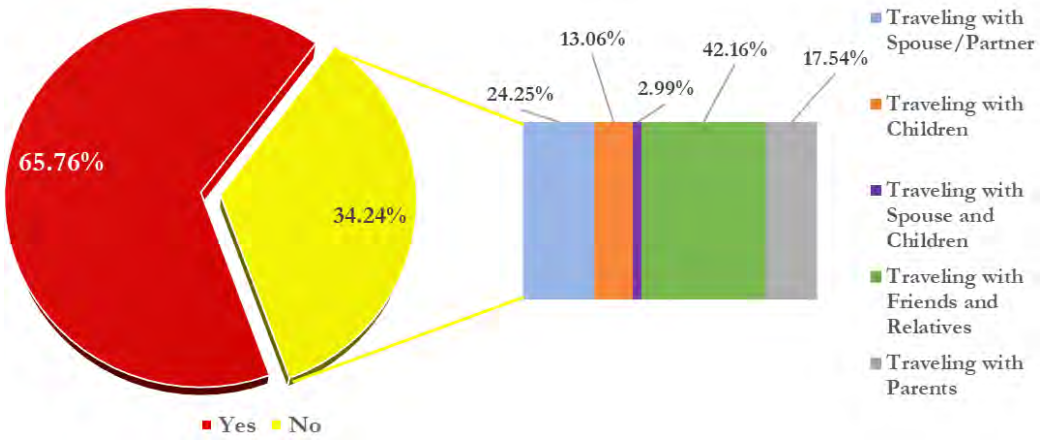
FIGURE 3.11 MAIN PURPOSE OF VISIT OF RESPONDENTS



3.3.5 TRAVEL PARTY

The survey revealed that the majority of respondents traveling abroad, 65.76%, traveled independently. Among those who traveled with companions, 42.16% reported traveling with friends and family, while couples accounted for 24.25%. A small proportion, 2.99%, traveled with both their spouse and children. This distribution underscores the diversity in travel companionship among Ethiopian tourists, highlighting a strong preference for independent travel, followed by group travel with friends and family, and a smaller segment of family-oriented travel. (Fig. 3.12).

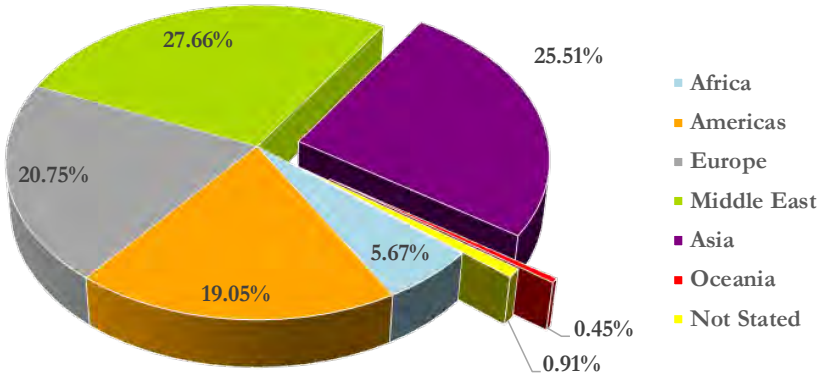
FIGURE 3.12 TRAVEL PARTY



3.3.6 DESTINATIONS

Ethiopian respondents exhibited distinct travel patterns across various global destinations, with a clear focus on Asia, the Middle East, and the Americas. Asia and the Middle East emerged as the leading regions, comprising 25.56 percent and 24.52 percent of trips, respectively. The Americas followed closely at 23.89 percent, reflecting strong interest in this region. Europe also attracted a significant portion of travelers, accounting for 18.41 percent of trips. Conversely, Africa (5.32 percent) and Oceania (1.74 percent) were less frequently visited by Ethiopian tourists. (Figure 3.13)

Figure 3.13 Destinations



The survey asked respondents to list all the destinations they visited during their trip, from start to finish. The table below illustrates the regional distribution of these destinations, providing a detailed view of the destination preferences among Ethiopian travelers. (Table 3.24)

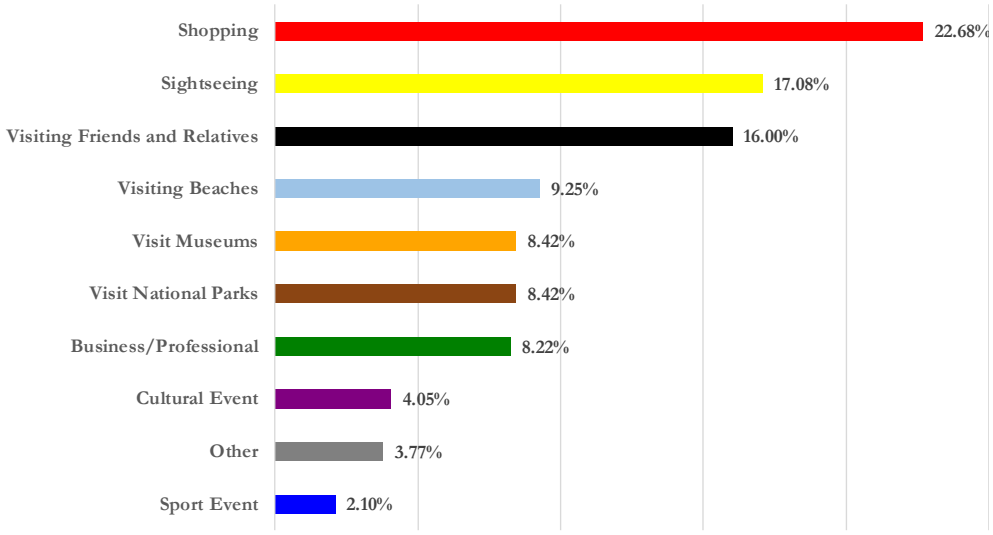
Table 3.24 All Destinations

	First Destination	Second Destination	Third Destination	Fourth Destination	Fifth Destination	Sixth Destination
Africa	5.32%	7.61%	0.00%	33.33%	0.00%	7.04%
Americas	23.89%	34.72%	7.35%	56.41%	0.00%	0.00%
Europe	18.41%	26.63%	75.74%	1.28%	22.73%	83.10%
Middle East	24.52%	4.79%	0.74%	8.97%	77.27%	0.00%
Asia	25.56%	25.03%	16.18%	0.00%	0.00%	9.86%
Oceania	1.74%	1.23%	0.00%	0.00%	0.00%	0.00%
Not Stated	0.56%	0.00%	0.00%	0.00%	0.00%	0.00%

3.3.7 Main Activities

Ethiopian tourists engage in a variety of activities during their travels. Shopping is the most popular activity, accounting for 22.68 percent. This is followed by sightseeing at 17.08 percent, and visiting friends and relatives at 16 percent. Other notable activities include visiting beaches (9.25 percent), museums (8.42 percent), national parks (8.42 percent), and business/professional travel (8.22 percent). The "Other" category includes activities such as hiking, historical excursions, exhibitions, religious pilgrimages, study, medical treatments, city tours, and attending training and workshops. (Figure 3.14)

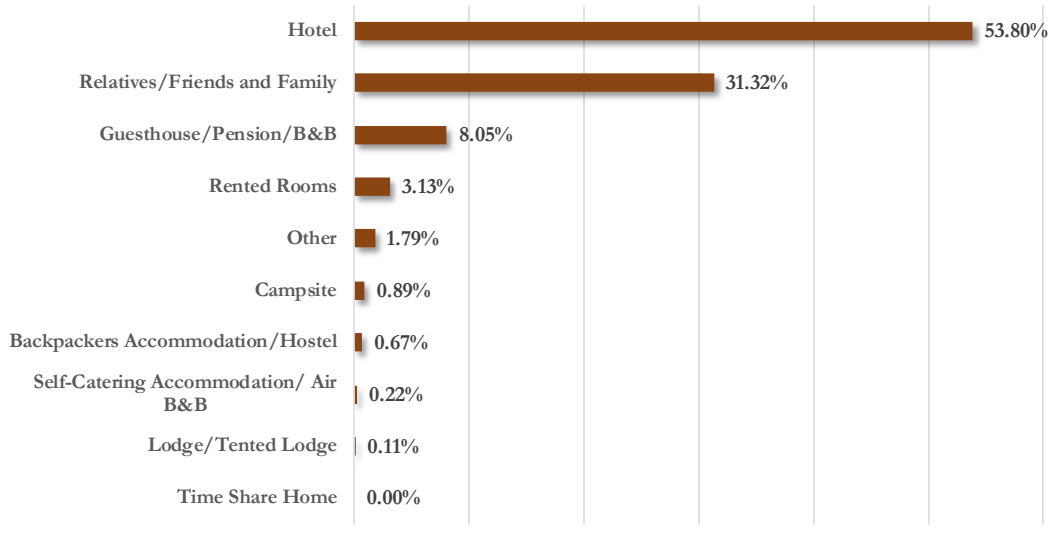
FIGURE 3.14 TRAVEL PARTY



3.3.8 TYPE OF ACCOMMODATION

The survey findings offer valuable insight into the accommodation preferences of Ethiopian tourists, revealing that hotels were the most popular choice, with 53.80 percent of respondents opting to stay in hotels. The second most common accommodation type was staying in the homes of relatives and friends, accounting for 31.32 percent. Other accommodations, such as guesthouses, rented rooms, and campsites, were used less frequently, while categories like conservancy campsites and time-share homes were not utilized by respondents. (Figure 3.15)

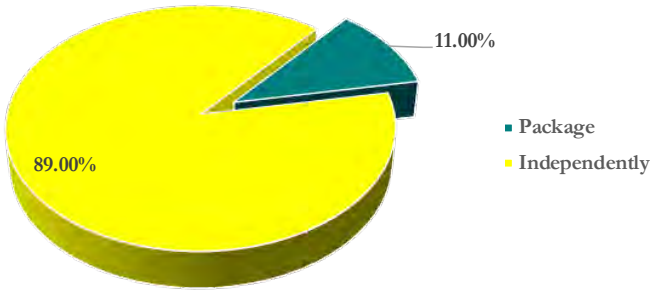
FIGURE 3.15 TYPE OF ACCOMMODATION



3.3.9 Travel Arrangement

A significant majority of respondents, 89.00 percent, preferred to organize their travel independently. In contrast, only 11.00 percent opted for package travel arrangements. This indicates a clear preference for independent travel planning among Ethiopian tourists. (Figure 3.16)

Figure 3.16 Travel arrangement



When asked about assistance with arranging their travel, even for those who planned independently, the majority of respondents (71.09 percent) indicated they arranged most or all of their travel themselves. In comparison, other methods, such as using travel agents (9.41 percent), sponsored travel (9.98 percent), and assistance from friends or family outside Ethiopia (2.72 percent), were less common. (Table 3.25)

Table 3.25 travel arrangements Assistance

	Frequency	Percent
Tour Operator	2	0.23
Student loan/ bursary provider	2	0.23
Not Stated	4	0.45
Work staff	19	2.15
Friends or family outside Ethiopia	24	2.72
Partially Sponsored	33	3.74
Travel Agent	83	9.41
Sponsored Travel	88	9.98
I arranged most/all it myself	627	71.09
Total	**882**	**100.00**

3.3.10 Length of Stay/ Nights

In total, the survey respondents spent 22,387 nights abroad, with an average length of stay of 25.29 days/ nights. (Table 3.26)

Table 3.26 Length of Stay

Length of Stay/Nights (Weighted)	
Mean	25.29
Median	12.00
Std. Deviation	43.99
Minimum	1.00
Maximum	363.00

3.3.10.1 Distribution of Length of Stay/Nights by Destination Region

As summarized in Figure 3.16 or detailed in Table 3.27, the findings show that the majority of the days and nights for Ethiopian respondents were spent in Asia, followed by the Americas and the Middle East. Europe, Africa, and Oceania had fewer total days/nights, with some destinations not being stated. This provides a clear picture of the travel distribution among Ethiopian tourists across different destinations.

Figure 3.17 Distribution of Length of Stay by Region of Residence

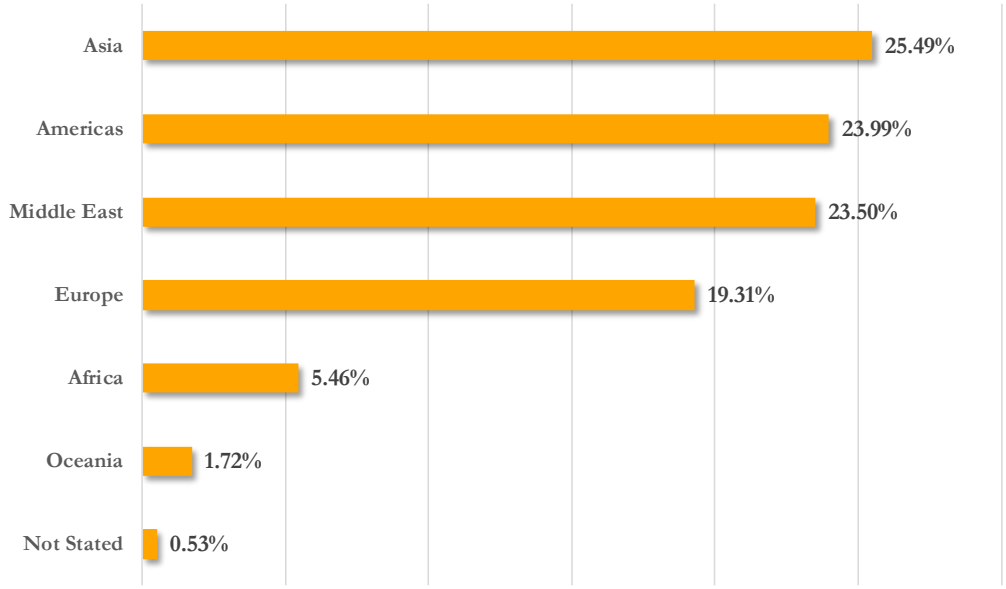


Table 3.27 Distribution of Length of Stay by Destination Country

Country	Nights/ Days	%
Africa	**1,223**	**5.46%**
Djibouti	2	0.01%
Egypt	130	0.58%
Ghana	37	0.17%
Kenya	524	2.34%
Madagascar	90	0.40%
Mauritius	16	0.07%
Morocco	17	0.08%
Rwanda	28	0.13%
Somalia	60	0.27%
South Africa	208	0.93%
Sudan	35	0.16%
Togo	1	0.00%
Uganda	70	0.31%
Angola	5	0.02%
Americas	**5,370**	**23.99%**
Canada	601	2.68%
Colombia	360	1.61%
USA	4,379	19.56%
Venezuela	30	0.13%
Europe	**4,322**	**19.31%**
Armenia	4	0.02%
Austria	57	0.25%
Belgium	267	1.19%
Cyprus	50	0.22%
Denmark	15	0.07%
France	396	1.77%
Germany	996	4.45%
Greece	13	0.06%
Italy	633	2.83%
Netherlands	213	0.95%
Norway	163	0.73%
Poland	72	0.32%
Romania	3	0.01%
Russia	92	0.41%
Spain	486	2.17%
Sweden	321	1.43%
Switzerland	110	0.49%
United Kingdom	372	1.66%
Bulgaria	10	0.04%
Czech	4	0.02%
Croatia	45	0.20%
Middle East	**5,261**	**23.50%**
Israel	320	1.43%
Jordan	13	0.06%
Kuwait	251	1.12%
Lebanon	58	0.26%
Oman	27	0.12%
Qatar	358	1.60%
Saudi Arabia	888	3.97%
Turkey	337	1.51%
United Arab Emirates	3,009	13.44%
Asia	**5,706**	**25.49%**
China	1,593	7.12%
Hong Kong	257	1.15%
India	1,669	7.46%
Indonesia	14	0.06%
Japan	597	2.67%
Korea, South	49	0.22%
Malaysia	24	0.11%
Pakistan	68	0.30%
Philippines	8	0.04%
Singapore	78	0.35%
South Korea	3	0.01%
Sri Lanka	5	0.02%
Taiwan	180	0.80%
Thailand	1,139	5.09%
Vietnam	20	0.09%
Bangladesh	**2**	0.01%
Oceania	**386**	**1.72%**
Australia	373	1.67%
Solomon Islands	6	0.03%
Vietnam	7	0.03%
Not Stated	**119**	**0.53%**
Not Stated	119	0.53%
Total	**22,387**	**100.00%**

3.3.10.2 Length of Stay by Purpose of Visit

Ethiopian travelers display diverse patterns in trip duration, with business and professional trips accounting for the largest share at 30.29 percent of total nights, followed by visits to friends and relatives at 27.67 percent. Holiday and leisure trips comprised 15.14 percent, while meetings and conferences accounted for 6.63 percent. Other activities made up 14.74 percent. As shown in Table 3.28, business and personal visits dominate extended stays among Ethiopian tourists.

Table 3.28 Length of Stay by Purpose of Visit

Purpose of Visit		Nights/ Days
Meeting and Conference	Mean	18.32
	Median	10.00
	Minimum	1.00
	Maximum	184.00
Business/Professional	Mean	28.45
	Median	13.50
	Minimum	1.00
	Maximum	360.00
Holiday/ Leisure/Recreation	Mean	15.76
	Median	10.00
	Minimum	1.00
	Maximum	122.00
Visiting Friends and Relatives	Mean	30.62
	Median	14.00
	Minimum	1.00
	Maximum	348.00
Cultural Event	Mean	18.33
	Median	17.50
	Minimum	5.00
	Maximum	30.00
Other	Mean	27.05
	Median	12.00
	Minimum	2.00
	Maximum	284.00
Not- Stated	Mean	53.71
	Median	19.00
	Minimum	4.00
	Maximum	363.00

3.3.10.3 Length of Stay by Travel Arrangement

Of the total nights spent abroad, package travelers accounted for 9.35 percent, while independent travelers dominated with 90.65 percent. This highlights a strong preference for independent travel arrangements among Ethiopian tourists. (Table 3.29)

Table 3.29 Length of Stay by Travel Arrangement

Travel Arrangement		Nights/ Days
Package	Mean	21.25
	Median	11.00
	Minimum	1.00
	Maximum	209.00
Non Package	Mean	25.79
	Median	12.00
	Minimum	1.00
	Maximum	363.00

3.3.11 Expenditure

This section analyzes the expenditure patterns of Ethiopian tourists during their travels abroad, categorized by purpose of visit, region of destination, and travel arrangement. It offers insights into how different groups of travelers allocate their spending across various categories, helping to assess the economic impact of foreign exchange spending on the local economy.

The total expenditure per trip was calculated to be USD 2,845.90, representing the average amount spent by international visitors during their stay in Ethiopia. (Table 3.30)

Table 3.30 Overall Average Expenditure

Expenditure (Weighted) USD	
Mean	2,845.90
Median	2,338.34
Std. Deviation	1,911.18
Minimum	110.00
Maximum	22,747.00

3.3.11.1 Average Daily Expenditure

On average, Ethiopian tourists spent 25.29 days/nights abroad, with a daily expenditure of USD 112.41. However, daily spending varied significantly based on factors such as destination, purpose of travel, and trip arrangements. The highest expenditures were observed in regions categorized as "non-stated," with holidaymakers recording the highest daily spending at an average of USD 182.06. Additionally, tourists who opted for package arrangements had higher daily expenditures, averaging USD 140.30, compared to independent travelers. Further details are available in the Table 3.31 below.

Table 3.31 Average Daily Expenditure USD (Weighted)

Region	
Africa	144.90
Americas	109.77
Europe	161.62
Middle East	120.55
Asia	116.37
Oceania	17.55
Not Stated	167.44
Purpose of Visit	
Meeting and Conference	152.69
Business/Professional	104.80
Holiday/Leisure/Recreation	182.06
Visiting Friends and Relatives	77.53
Cultural Event	91.73
Other	127.20
Not Stated	46.91
Trip Arrangement	
Package	140.30
Independently	109.57

3.3.11.2 Distribution of Expenditure by Items

Ethiopian tourists abroad allocate their spending across various standard categories. For the Survey respondents, Air transport services represented the largest share at 28.61 percent followed by shopping at 23.06 percent emphasizing the importance of retail activities during travel. Other expenses make up 16.0 percent, covering miscellaneous costs, while accommodation accounts for 14.57 percent of the total expenditure, reflecting the substantial cost of lodging. (Table 3.32)

Table 3.32 Distribution of Expenditure by Items

Expenditure Items	USD	%
Accommodation Services	375,597.90	14.57
Accommodation for Vacation Home Ownership	2,800.00	0.11
Food and Beverages Services	168,806.28	6.55
Air transport Services	737,788.82	28.61
Road Transport Services	48,420.27	1.88
Railway transport Services	16,655.71	0.65
Water transport Services	7,459.82	0.29
Transport Equipment Rental Services	10,101.36	0.39
Travel Agency and Other Reservation Services	3,355.65	0.13
Cultural Services	6,060.10	0.24
Sport and Recreational Services	11,220.22	0.44
Shopping	608,445.41	23.60
Capital Purchase	4,045.81	0.16
Handicrafts	5,160.59	0.20
Sightseeing	25,987.70	1.01
Medical Services	98,213.81	3.81
Valuables	13,958.59	0.54
Travel Insurance	13,752.78	0.53
Tourism Goods	5,564.63	0.22
Tourism Services	832.58	0.03
Other	414,390.88	16.0
Total	**2,578,618.91**	**100.00**

3.3.11.3 Distribution of Average Expenditure Purpose of Visit

An analysis of average expenditure by purpose of visit for Ethiopian respondents traveling abroad reveals significant variations. Respondents traveling for purposes other than those specified reported the highest average expenditure, totaling USD 3,440.77. In contrast, those attending cultural events recorded the lowest average expenditure, with a spend of USD 1,681.63. Expenditures for other purposes generally ranged between USD 2,000.00 and USD 2,981.04. (Table 3.33)

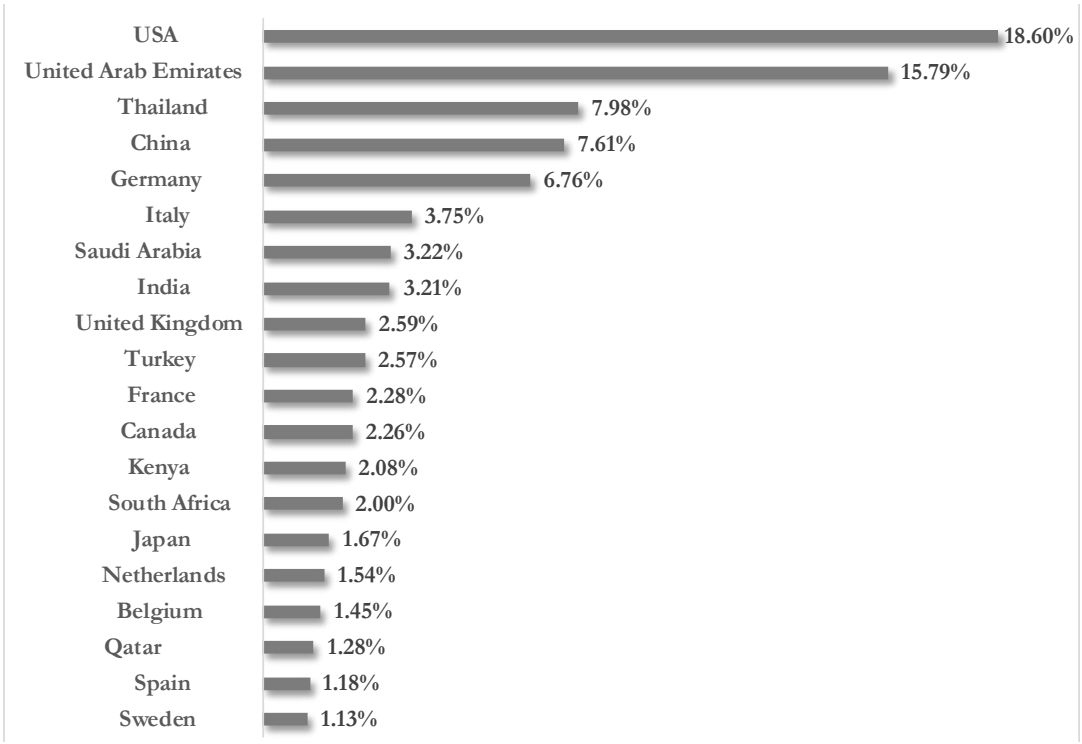
Table 3.33 Distribution of Average Expenditure Purpose of Visit

Purpose of Visit		Weighted Expenditure
Meeting and Conference	Mean	2,832.46
	Median	2,265.05
	Minimum	393.00
	Maximum	8,745.39
Business/Professional	Mean	2,981.04
	Median	2,550.22
	Minimum	119.47
	Maximum	22,747.00
Holiday/ Leisure/ Recreation	Mean	2,869.38
	Median	2,479.34
	Minimum	203.00
	Maximum	12,090.00
Visiting Friends and Relatives	Mean	2,374.15
	Median	2,000.00
	Minimum	110.00
	Maximum	11,358.62
Cultural Event	Mean	1,681.63
	Median	1,615.21
	Minimum	498.47
	Maximum	3,267.37
Other	Mean	3,440.77
	Median	2,946.88
	Minimum	358.17
	Maximum	13,363.96
Not Stated	Mean	2,519.60
	Median	2,241.72
	Minimum	635.38
	Maximum	6,823.23

3.3.11.4 Top 20 Destination Countries by Expenditure

The graph below illustrates the distribution of expenditure across the top 20 destinations by Ethiopian respondents. The United States and the United Arab Emirates lead the list, with Ethiopian travelers allocating the largest share of their total foreign expenditure to these countries—18.60 percent and 15.79 percent, respectively. Thailand follows at 7.98 percent, closely followed by China at 7.61 percent. Germany and Italy are listed with 6.76 percent and 3.75 percent, respectively. (Figure 3.18)

Figure 3.18 Top 20 Destination Countries by Expenditure



3.3.11.5 Expenditure by Travel Arrangement

The findings reveal a clear distinction in expenditure patterns based on travel arrangements. Ethiopian respondents who opted for package tours reported an average expenditure of USD 3,012.04, surpassing the average spending of independent travelers, who spent USD 2,825.59. This suggests that travelers utilizing package arrangements tend to allocate a higher overall budget for their trips. (Table 3.34)

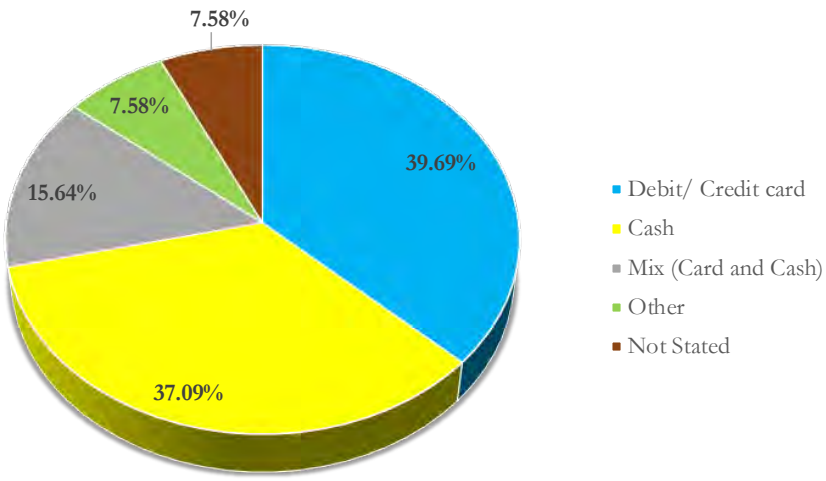
Table 3.35 Expenditure by Travel Arrangement

Travel Arrangement		Weighted Expenditure(USD)
Package	Mean	3,012.04
	Median	2,770.43
	Minimum	119.47
	Maximum	7,465.00
Non -Package	Mean	2,825.59
	Median	2,281.36
	Minimum	110.00
	Maximum	22,747.00

3.3.12 Modes of Payment

An analysis of payment preferences among Ethiopian respondents indicates that the predominant method of payment was debit or credit cards, utilized by 39.69 percent of travelers. Cash payments closely followed at 37.09 percent. Additionally, 15.64 percent of respondents reported using a combination of both card and cash. Alternative payment methods, including mobile banking, company cards, bank transfers, and WeChat Pay, accounted for 7.58 percent each, while an unspecified category also represented 7.58 percent. (Figure 3.19)

Figure 3.19 Distribution of Modes of Payment





- APPENDIX -



APPENDIX - A - SURVEY QUESTIONNAIRE (2024)

Appendix A1: Inbound- Visitor Exit Survey Questionnaire (2024)

MINISTRY OF TOURISM

Ethiopia

ETHIOPIA'S INBOUND/EXIT TOURISM SURVEY 2024
(Bole International Airport)

Dear Passenger,
The FDRE Ministry of Tourism is conducting a survey among a sample of passengers leaving from Ethiopia; the survey is designed to provide basic data on tourism to the government and other users, the survey result will be an important tool to improve tourism services. Would you please take a few moments to answer this questionnaire?

PRELIMINARY QUESTIONS
NB: Tick in the appropriate box

	Yes	No
Is ETHIOPIA your usual place of residence?		
Do you at least cross this border/ port once a week?		
Were you remunerated for the purpose of your stay in ETHIOPIA?		

(If the answer is yes to any of the above questions, terminate the interview)

PROFILE

Q1. Country of residence? ..... Nationality of respondent? .....
Q2. Sex of respondent? Male ☐ Female ☐
Q3. What is your age? .....
Q4. What is your occupation?
Professional ☐ Business ☐ Students ☐ Other (specify).....
Q5. Highest educational level?
Primary ☐ Secondary ☐ College Diploma ☐
University Degree & Above ☐ Others(specify) .....

TRAVEL DETAILS

Q6. Date of arrival & departure (dd/mm/yyyy)
Arrival date: ...../...../..... Departure date: ...../...../.....
Q7. Main purpose of visit? (Single answer only)
Meeting and conference ☐ Business/professional ☐ Study/student ☐
Visiting friends and relatives ☐ Holiday/Leisure/Recreation ☐ Cultural event ☐
Religion/pilgrimage ☐ Others (Specify) .....
Q8. Whom are you travelling with? (multiple answer possible)
Alone (if the answer is 1 go to Q9) ☐ With spouse/partner ☐ With children ☐
With spouse and children ☐ With friends and relatives ☐ With parents ☐
Please specify, #Female ..... #Male.....
Q9. Is this your first visit to ETHIOPIA? (If yes, go to Q10)
Yes ☐ No ☐
If no how many times have you visited ETHIOPIA in the last six months?
Q10. Is this your first visit to ETHIOPIA? (If yes, go to Q10)
Yes ☐ No ☐
If no how many times have you visited ETHIOPIA in the last six months?

DRAFT

Q11. How did you come to know about ETHIOPIA? (Multiple answer possible)

Travel Agents ☐ Tour Operators ☐ Friends/Relatives ☐
Trade Fair/Expo ☐ Newspapers/ magazines ☐ Social media ☐
In-flight Magazines ☐ Television/ Radio Station ☐ Ehtiopian Foreign missions ☐
10 Others (please specify).....

Q12. What attracted you to visit ETHIOPIA? (Multiple answer possible)

Ethiopian Culture ☐ Ethiopian cuisine ☐ Religious event ☐
Climate ☐ Scenery ☐ Value of money ☐
Wildlife ☐ Diversity of attractions ☐ Safety and Security ☐
Sense of Space ☐ To see friends/relatives ☐ Educational trip ☐
Curiosity ☐ Historical attractions ☐ Museum ☐
Others (Please Specify) .....

Q13. Which attraction/destinations did you visit during your stay? Specify all

Attraction/ Destination ..... # of Nights/Days.....
Attraction/ Destination ..... # of Nights/Days.....
Attraction/ Destination ..... # of Nights/Days.....
Attraction/ Destination ..... # of Nights/Days.....
Attraction/ Destination ..... # of Nights/Days.....
Attraction/ Destination ..... # of Nights/Days .....

EXPENDITURE

Q14. What is the total amount you have spent on your whole trip (including your expenditure in your place of origin)?

Total Amount Spent ..... Currency.....

Q13.1. How much was spent in ETHIOPIA?

Total Amount Spent..... .....Currency.....

Q15. Are you travelling on a package tour? (It applies to individual, couple, family, and group) If no go to

Yes ☐ No ☐

Q16. What was included in the package:

International travel to/from [Ethiopia] ☐ Accommodation in [Ethiopia] ☐
Meals in [Ethiopia] Transport within [Ethiopia] Tours within [Ethiopia] ☐
Car rental within [Ethiopia] ☐ Other services within [Ethiopia] .....

Q17. Specify your total expenditure on the following services in ETHIOPIA:

Type of service	Amount Spent	Currency		Type of service	Amount Spent	Currency
Accommodation service				Sport, Recreation and Entertainment		
Accommodation for vacation home ownership				Capital purchase e.g. house		
Food and Drinks				Cultural service		
Air transport				Travel agency/ Reservation		
Road Transport				Valuables		
Train/rail way				Others (please specify)		
Water transport/ Canoe						
Transport equipment rentals						

DRAFT

Q18. How much did you spend on the following leisure activities while in ETHIOPIA? (Indicate amount in the appropriate box)

Activity/ Goods	**Amount Spent**	**Currency**		**Type of service**	**Amount Spent**	**Currency**
Cultural clothes and shoes				Archeological/ Historical Visits		
Souvenirs				Bird Watching		
Handicrafts				Hot Air Ballooning		
Ethiopian Leather products				Hiking/Trekking		
Paintings				Hunting		
Cultural Tours				Gifts (for Hosts)		
Cultural shows and festivals				Others (Please Specify)		
Cultural food and restaurants						
Traditional Medicine						

EVALUATIONS

Q19. Rating of your experience of the following items

Item	Excellent	Very Good	Good	Satisfactory	Poor
Safety & Security					
Accommodation Services					
Food and Beverages					
Transportation Services					
Internet and Telephone Services					
Foreign Exchange Services					
Shopping Centers: Souvenirs, Handicrafts					
Historical Attractions					
Nature & Wildlife Attractions					
Cultural Attractions					
Language Capabilities					
Evaluation of Tour Operators					
Hygiene					

DRAFT

Q20. How was your stay compared to your Expectation?

Very Satisfied ☐ Satisfied ☐ Fair ☐ Dissatisfied ☐ Very Dissatisfied ☐

Q21. Would you visit Ethiopia again?

Yes ☐ No ☐ Maybe ☐

Q22. Do you intend to write on a social website about your trip to Ethiopia?

Yes ☐ No ☐ Maybe ☐

Q23. Would you recommend Ethiopia to others?

Yes ☐ No ☐ Maybe ☐

Q24. What was the highlight of your visit?

.....

.....

Q25 What do you feel Ethiopia needs to do, to improve as a tourist destination?

.....

.....

Appendix A2: Outbound - Visitor Entry Survey Questionnaire (2024)

MINISTRY OF TOURISM

Ethiopia

ETHIOPIA'S OUTBOUND/ENTRY TOURISM SURVEY 2024

(Bole International Airport)

PRELIMINARY QUESTIONS

NB: Tick in the appropriate box

	Yes	No
Is ETHIOPIA your usual Country of residence? (If no, terminate the interview.)		
Do you cross this border once a week or more often? (If yes, terminate the interview.)		

(If the answer is yes to any of the above questions, terminate the interview)

PROFILE

Q1. Country of residence? ..... Nationality of respondent? .....

Q2. Sex of respondent? Male ☐ Female ☐

Q3. What is your age? .....

Q4. What is your occupation?

Professional ☐ Business ☐ Students ☐ Other (specify).....

Q5. Highest educational level?

Primary ☐ Secondary ☐ College Diploma ☐

University Degree & Above ☐ Others(specify).....

TRAVEL DETAILS

Q6. Date of departure (dd/mm/yyyy)

Departure date: ..... /..... /.....

Q7. Main purpose of of travel outside ETHIOPIA? (Single answer only)

Meeting and conference ☐ Business/professional ☐ Study/student ☐

Visiting friends and relatives ☐ Holiday/Leisure/Recreation ☐ Cultural event ☐

Religion/pilgrimage ☐ Others (Specify) .....

Q8. Whom are you travelling with? (multiple answer possible)

Alone (if the answer is 1 go to Q9) ☐ With spouse/partner ☐ With children ☐

With spouse and children ☐ With friends and relatives ☐ With parents ☐

Please specify, #Female ..... #Male.....

Q9. a) What was your final destination?(State country).....

b) Which other countries have you visited on this trip? Yes ☐ No ☐

Country ..... # of Nights/Days.....

Country..... # of Nights/Days.....

Country ..... # of Nights/Days.....

Country ..... # of Nights/Days.....

Country ..... # of Nights/Days.....

Country ..... # of Nights/Days.....

DRAFT

Q7 a) What were your MAIN activities on this trip?(Multiple responses possible)(list in order of preference, 1 being the most preferred,
i.e. 1,2,3..

Business/Professional ☐ Visiting friends and relatives ☐ Sightseeing ☐ Visit National Parks ☐
Visit museums ☐ Health/treatment ☐ Shopping ☐ Cultural event ☐
Visiting beaches ☐ Sport Event ☐ Others, specify.....

Q8. What type of accommodation did you stay in while abroad?(Choose all possible answer)

Hotel ☐ Rented Rooms ☐ Guesthouse/Pension/B&B ☐
Relatives/Friends and family ☐ Lodge/Tented Lodge ☐ Campsite ☐ Guest Farm ☐
Backpackers Accommodation/Hostel Self-catering Accommodation/ Air B&B ☐
Conservancies campsites ☐ Time share home ☐ Others, specify.....

Q9. a) Are you travelling on a Package tour or independently?

Package ☐ Independently ☐

b) Who made most of the travel arrangements for you

Travel Agent ☐ Tour Operator ☐ Friends or family in ETHIOPIA ☐ Work staff ☐
I arranged most/all it myself Student loan/ bursary provider ☐ Sponsored travel ☐
Others (please specify).....

Package tour go to Q9
Non- Package tours go to Q10

Q10 (Please note that this question is only for package tours) i.e., if Q8a= Package):

a) Did the package tour include the following? (Choose all applicable answers)

International Return Transport ☐ Transportation outside ETHIOPIA
Transportation within ETHIOPIA Accommodation ☐ Food and drinks ☐
National Parks/ Reserves/Sanctuaries ☐ Museums/Heritage Sites ☐
Cultural Events ☐ Sightseeing excursion/ ☐ Event/Conference ☐ Guided tours ☐
Travel insurance ☐ Other, specify.....

b) Amount paid for the package tour(indicate the currency) Amount..... Currency.....

c) Is this total cost for the whole trip? (If yes, skip d)

Yes No

d) Additional Expenditure not included in package tour?

(Amount including everything spent in ETHIOPIA in preparation for this trip, as well as package non-inclusive spent outside ETHIOPIA)

Specify additional expenditure incurred	Amount	Currency

Q11 (Please note that question is only for non-package tours i.e., if Q11a = Independently):

a) What is the total amount you have spent on your whole trip (including everything spent in ETHIOPIA in preparation for this trip)? Amount..... Currency.....

DRAFT

b) Of the above amount, please give details of your total expenditure abroad on the following: (please give your best estimate in case you do not remember the exact figures)

	Amount	Currency
Accommodation		
Accommodation for vacation home ownership		
Food and Beverages		
Air transport		
Road Transport		
Railway transport		
Water transport		
Transport equipment rental services		
Travel agency and other reservation services		
Cultural services		
Sport and recreational services		
Shopping		
Capital purchase e.g. house		
Handicrafts		
Sightseeing		
Medical		
Valuables		
Travel Insurance		
Country-specific tourism characteristic good (specify)		
Country-specific tourism characteristic services (specify)		
Others (specify)		
Total		

DRAFT

Q12a) Method of payment for the trip?

Debit/credit card(s), go to Q16b Mix (cash and Card), go to Q12c Cash, go to Q12c

Q12b) which debit/credit card(s) did you use ?

American Express☐ Visa ☐ Master Card☐ Other (Specify)..... Go to Q13

Q12c)

Amount of Cash Payments (Indicate the currency) .....

Q13. To improve tourism in ETHIOPIA, what do you feel ETHIOPIA should learn from the country you visited?

.....

.....

.....

.....

APPENDIX - B - INBOUND TOURISM - 2023

Appendix - B1 - International Visitors Arrival By Country of Residence - 2023

Country of Residence	Count	Percent
Total	**1,076,299**	**100.00%**
Africa	**827,337**	**76.87%**
East Africa	**300,494**	**27.92%**
British Indian Ocean Territory	113	0.01%
Burundi	27,461	2.55%
Comoros	12,197	1.13%
Djibouti	28,887	2.68%
Eritrea	11,371	1.06%
Kenya	64,590	6.00%
Madagascar	21,337	1.98%
Malawi	16,156	1.50%
Mauritius	442	0.04%
Mozambique	11,068	1.03%
Rwanda	3,985	0.37%
Seychelles	3,380	0.31%
Somalia	21,387	1.99%
Tanzania, United Republic of	25,874	2.40%
Uganda	7,612	0.71%
Zambia	19,871	1.85%
Zimbabwe	24,750	2.30%
Other Countries of East Africa	13	0.00%
Central Africa	**115,283**	**10.71%**
Angola	7,439	0.69%
Cameroon	34,791	3.23%
Central African Republic	1,656	0.15%
Chad	11,711	1.09%
Congo	15,223	1.41%
Congo, Democratic Republic of the	37,187	3.46%
Equatorial Guinea	2,850	0.26%
Gabon	4,122	0.38%
Sao Tome and Principe	304	0.03%
Other Countries of Central Africa	0	0.00%
North Africa	**142,057**	**13.20%**
Algeria	342	0.03%
Morocco	551	0.05%
South Sudan	7,181	0.67%
Sudan	133,375	12.39%
Tunisia	608	0.06%
Other Countries of North Africa	0	0.00%
Southern Africa	**34,620**	**3.22%**
Botswana	5,599	0.52%
Eswatini	349	0.03%
Lesotho	423	0.04%
South Africa	6,539	0.61%
Other Countries of Southern Africa	0	0.00%

Country of Residence	Count	Percent
West Africa	**234,883**	**21.82%**
Benin	6,673	0.62%
Burkina Faso	8,798	0.82%
Cabo Verde	748	0.07%
Côte d'Ivoire	13,946	1.30%
Gambia	2,643	0.25%
Ghana	25,371	2.36%
Guinea	11,869	1.10%
Guinea-Bissau	945	0.09%
Liberia	1,994	0.19%
Mali	13,702	1.27%
Mauritania	914	0.08%
Niger	8,762	0.81%
Nigeria	108,933	10.12%
Senegal	20,494	1.90%
Sierra Leone	3,345	0.31%
Togo	5,746	0.53%
Other Countries of Africa	0	0.00%
Americas	**60,838**	**5.65%**
Caribbean	688	0.06%
Antigua and Barbuda	7	0.00%
Barbados	16	0.00%
Cuba	150	0.01%
Dominica	23	0.00%
Dominican Republic	21	0.00%
Grenada	21	0.00%
Haiti	212	0.02%
Jamaica	86	0.01%
Saint Kitts and Nevis	71	0.01%
Saint Lucia	8	0.00%
Saint Vincent and the Grenadines	3	0.00%
Trinidad and Tobago	60	0.01%
Other Countries of the Caribbean	0	0.00%
Central America	**131**	**0.01%**
Belize	7	0.00%
Costa Rica	41	0.00%
El Salvador	9	0.00%
Guatemala	33	0.00%
Honduras	22	0.00%
Nicaragua	11	0.00%
Panama	8	0.00%
Other Countries of Central America	0	0.00%

Country of Residence	Count	Percent
North America	**47,178**	**4.38%**
Canada	8,588	0.80%
Mexico	207	0.02%
Canada, United States	38,383	3.57%
Other Countries of North America	0	0.00%
South America	**12,839**	**1.19%**
Argentina	3,402	0.32%
Bolivia, Plurinational State of	217	0.02%
Brazil	7,688	0.71%
Chile	132	0.01%
Colombia	242	0.02%
Ecuador	34	0.00%
Guyana	42	0.00%
Paraguay	143	0.01%
Peru	284	0.03%
Uruguay	608	0.06%
Venezuela, Bolivarian Republic of	47	0.00%
Other Countries of South America	0	0.00%
East Asia and The Pacific	**35,431**	**3.29%**
North East Asia	**24,385**	**2.27%**
China	17,131	1.59%
Japan	2,976	0.28%
Korea, Democratic People's Republic of	18	0.00%
Korea, Republic of	3,988	0.37%
Mongolia	29	0.00%
Taiwan Province of China	243	0.02%
South East Asia	**8,419**	**0.78%**
Brunei Darussalam	3	0.00%
Cambodia	31	0.00%
Indonesia	2,941	0.27%
Lao People's Democratic Republic	2	0.00%
Malaysia	697	0.06%
Myanmar	57	0.01%
Philippines	3,652	0.34%
Singapore	356	0.03%
Thailand	373	0.03%
Timor-Leste	50	0.00%
Viet Nam	257	0.02%
Australasia	**2,531**	**0.24%**
Australia	2,147	0.20%
New Zealand	384	0.04%

Country of Residence	Count	Percent
Melanesia	**90**	**0.01%**
Fiji	12	0.00%
Norfolk Island	2	0.00%
Papua New Guinea	22	0.00%
Solomon Islands	53	0.00%
Vanuatu	1	0.00%
Polynesia	**6**	**0.00%**
Samoa	3	0.00%
Tonga	3	0.00%
Other Countries East Asia/ Pacific	0	0.00%
Europe	**80,646**	**7.49%**
Central/ Eastern Europe	**6,172**	**0.57%**
Armenia	64	0.01%
Azerbaijan	25	0.00%
Belarus	144	0.01%
Bulgaria	74	0.01%
Czech Republic (Czechia)	484	0.04%
Estonia	67	0.01%
Georgia	63	0.01%
Hungary	128	0.01%
Kazakhstan	46	0.00%
Kyrgyzstan	42	0.00%
Latvia	958	0.09%
Lithuania	98	0.01%
Moldova, Republic of	8	0.00%
Poland	449	0.04%
Romania	317	0.03%
Russian Federation	2,752	0.26%
Slovakia	108	0.01%
Tajikistan	11	0.00%
Turkmenistan	1	0.00%
Ukraine	312	0.03%
Uzbekistan	21	0.00%
Other Countries Central/East Europe	0	0.00%
Northern Europe	**26,438**	**2.46%**
Denmark	1,031	0.10%
Finland	515	0.05%
Iceland	56	0.01%
Ireland	1,246	0.12%
Norway	3,649	0.34%
Sweden	3,110	0.29%
United Kingdom	16,782	1.56%
Other Countries of Northern Europe	49	0.00%

Country of Residence	Count	Percent
Southern Europe	**9,199**	**0.85%**
Albania	22	0.00%
Andorra	1	0.00%
Bosnia and Herzegovina	21	0.00%
Croatia	81	0.01%
Gibraltar	1	0.00%
Greece	423	0.04%
Holy See	3	0.00%
Italy	5,957	0.55%
Malta	53	0.00%
Montenegro	14	0.00%
North Macedonia	6	0.00%
Portugal	824	0.08%
San Marino	1	0.00%
Serbia	110	0.01%
Slovenia	84	0.01%
Spain	1,588	0.15%
Yugoslavia, SFR (former)	1	0.00%
Other Countries of Southern Europe	9	0.00%
Western Europe	**29,783**	**2.77%**
Austria	686	0.06%
Belgium	2,813	0.26%
France	11,227	1.04%
Germany	6,853	0.64%
Liechtenstein	5	0.00%
Luxembourg	30	0.00%
Netherlands	6,546	0.61%
Switzerland	1,623	0.15%
Other Countries of Western Europe	0	0.00%
East Mediterranean Europe	**9,054**	**0.84%**
Cyprus	43	0.00%
Israel	7,245	0.67%
Türkiye	1,766	0.16%
Other Countries of Europe	0	0.00%
Middle East	**11,519**	**1.07%**
Bahrain	84	0.01%
Egypt	496	0.05%
Iraq	31	0.00%
Jordan	509	0.05%
Kuwait	273	0.03%
Lebanon	1,712	0.16%
Libya	141	0.01%
Oman	212	0.02%
Qatar	93	0.01%
Saudi Arabia	5,752	0.53%

Country of Residence	Count	Percent
State of Palestine	52	0.00%
Syrian Arab Republic	149	0.01%
United Arab Emirates	553	0.05%
Yemen	1,445	0.13%
Other Countries of Middle East	17	0.00%
South Asia	**60,528**	**5.62%**
Afghanistan	59	0.01%
Bangladesh	640	0.06%
Bhutan	38	0.00%
India	55,451	5.15%
Iran, Islamic Republic of	124	0.01%
Maldives	7	0.00%
Nepal	364	0.03%
Pakistan	3,426	0.32%
Sri Lanka	419	0.04%
Other countries of South Asia	0	0.00%

Appendix - B2 - International Visitors Arrival by Sex - 2023

MONTHS	SEX		TOTAL	%
	Female	Male		
1st Quarter	**77,062**	**192,166**	**269,228**	**24.98%**
January	29,826	67,177	97,003	9.00%
February	23,704	59,108	82,812	7.68%
March	23,532	65,881	89,413	8.30%
2nd Quarter	**63,657**	**178,811**	**242,468**	**22.49%**
April	20,619	60,654	81,273	7.54%
May	22,257	58,301	80,558	7.47%
June	20,781	59,856	80,637	7.48%
3rd Quarter	**62,374**	**198,164**	**260,538**	**24.17%**
July	21,142	64,892	86,034	7.98%
August	20,793	66,434	87,227	8.09%
September	20,440	66,837	87,277	8.10%
4th Quarter	**105,285**	**200,381**	**305,666**	**28.36%**
October	32,201	62,227	94,428	8.76%
November	34,052	68,886	102,938	9.55%
December	39,032	69,268	108,300	10.05%
Total	**308,378**	**769,522**	**1,077,900**	
%	28.61%	71.39%	100.00%	

APPENDIX - C - OUTBOUND TOURISM - 2023

Appendix - C1 - International Departures by Ethiopians by Country of Destination- 2023

Country of Destination	Count	Percent
Total	**649,888**	**100.00%**
Africa	**95,295**	**14.66%**
East Africa	**65,007**	**10.00%**
Djibouti	9,350	1.44%
Eritrea	3,667	0.56%
South Sudan	4,691	0.72%
Kenya	27,213	4.19%
Tanzania	3,847	0.59%
Somalia	2,401	0.37%
Somaliland	2,123	0.33%
Uganda	9,107	1.40%
Rwanda	2,608	0.40%
Central Africa	**4,330**	**0.67%**
Angola	732	0.11%
Burundi	504	0.08%
Cameroon	572	0.09%
Central African Republic	280	0.04%
Chad	433	0.07%
Democratic Republic of the Congo	1,356	0.21%
Equatorial Guinea	49	0.01%
Gabon	100	0.02%
Republic of Congo	304	0.05%
North Africa	**3,011**	**0.46%**
Sudan	3,005	0.46%
Tunisia	6	0.00%
Southern Africa	14,975	2.30%
Comoros	16	0.00%
Madagascar	381	0.06%
Malawi	119	0.02%
Mozambique	484	0.07%
Namibia	674	0.10%
Seychelles	639	0.10%
South Africa	10,458	1.61%
Zambia	1,230	0.19%
Zimbabwe	974	0.15%
West Africa	**7,972**	**1.23%**
Benin	203	0.03%
Burkina Faso	75	0.01%
Côte d'Ivoire	1,701	0.26%
Ghana	1,765	0.27%
Liberia	110	0.02%
Mali	1,610	0.25%
Niger	290	0.04%
Nigeria	2,206	0.34%
Togo	12	0.00%
Americas	**6,167**	**0.95%**
North America	4,271	0.66%
Canada	1,524	0.23%
USA	2,747	0.42%
South America	1,896	0.29%
Brazil	1,896	0.29%
East Asia and The Pacific	**29,623**	**4.56%**
North Asia	17,190	2.65%
China	14,883	2.29%
Hong Kong	403	0.06%
South Korea	1,904	0.29%
South East Asia	12,433	1.91%
Thailand	10,372	1.60%
Indonesia	1,279	0.20%
Singapore	782	0.12%
Europe	**98,379**	**15.14%**
Northern Europe	49,755	7.66%
Ireland	41,501	6.39%
Sweden	3,652	0.56%
United Kingdom	4,602	0.71%
Southern Europe	7,823	1.20%
Italy	4,412	0.68%
Spain	3,411	0.52%
Western Europe	**14,300**	**2.20%**
Austria	3,952	0.61%
Belgium	2,993	0.46%
France	76	0.01%
Germany	6,948	1.07%
Netherlands	331	0.05%
Eastern Europe	**26,501**	**4.08%**
Russia	2,754	0.42%
Türkiye	18,452	2.84%

Country of Destination	Count	Percent
Israel	5,295	0.81%
MIDDLE EAST	**392,817**	**60.44%**
Bahrain	2,183	0.34%
Egypt	20,739	3.19%
Kuwait	4,237	0.65%
Lebanon	5,543	0.85%
Oman	2,078	0.32%
Qatar	29,951	4.61%
Saudi Arabia	128,200	19.73%
UAE	199,409	30.68%
Yemen	477	0.07%
South Asia	10,018	1.54%
India	10,018	1.54%
Not Stated	**17,589**	**2.71%**
Not Stated	17,589	2.71%



Appendix - C2 - Monthly International Departures by Ethiopians - 2023

Month	Female	Male	Total	%
January	25,263	19,808	**45,071**	6.94%
February	25,725	18,338	**44,063**	6.78%
March	26,660	20,349	**47,009**	7.23%
April	24,971	19,932	**44,903**	6.91%
May	30,986	21,829	**52,815**	8.13%
June	31,372	22,854	**54,226**	8.34%
July	33,461	22,662	**56,123**	8.64%
August	36,589	23,891	**60,480**	9.31%
September	37,128	24,340	**61,468**	9.46%
October	38,400	24,135	**62,535**	9.62%
November	36,888	21,826	**58,714**	9.03%
December	41,297	21,184	**62,481**	9.61%
Total	**388,740**	**261,148**	**649,888**	**100.00%**
%	59.82%	40.18%	**100.00%**	



APPENDIX - D - INTERNATIONAL VISITORS EXIT SURVEY (2019)

APPENDIX D1- INTERNATIONAL VISITORS EXIT SURVEY (2019) - QUESTIONNAIRE

MINISTRY OF CULTURE & TOURISM

INTERVIEW QUESTIONNAIRE FOR TOURISTS AT BOLE INTERNATIONAL AIRPORT (DEPARTURE)

Interview No. .....

PROFILE OF VISITORS

1. Nationality _____ **Country of Origin** _____ **Flight No.**_____

2. Sex: Female [ ] Male [ ] **3. Age** _____

TRAVEL DETAILS

4. Is this your first visit to Ethiopia? Yes [ ] No [ ] **If no, number of previous trips** _____

5. Main purpose of visit to Ethiopia

Conference [ ] Leisure and Holidays [ ] Business [ ]

Visiting Friends and Relatives [ ] [ ] If other, Please specify _____

6. If your answer for question No. 5 is leisure and holiday, which aspect attracted you more

History [ ] Nature and Wild life [ ] Cultural life (Food, Religion, Cultural Festivals) [ ]

7. From where did you get the information about Ethiopia?

Tourism Fair [ ] Internet(social media) [ ] MoCT website [ ] News Paper[ ] Relative& friends [ ]

Travel books/ Magazines [ ] Ethiopian Embassy on your country [ ]

8. Are you travelling in a group or on a package tour or self-arranged trip?

Package Tour [ ] Individual/ self-arranged trip [ ]

9. With whom are you travelling?

Spouse/ Companion [ ] Friends [ ] Family [ ] Alone [ ]

10. The total number of people travelling with : Female_____ Male _____

11. Items Included in your package tour:

International transport activity [ ] Accommodation [ ] Food and Beverages [ ] Guided tour [ ]

Internal transport in Ethiopia [ ] Sightseeing/ Excursion/ Game [ ] Travel insurance [ ]

If other, please specify _____

12. Place or type of accommodation

Starred Hotel [ ] Un-Starred Hotel [ ] Guest House/ Apartments [ ] Resorts/ Lodges [ ]

Friends & Relatives [ ] If other, please specify _____

13. What kind of transportation did you use during this stay?

Domestic Flight [ ] Mini-bus [ ] Bus [ ] 4WD Car [ ]

14. During this trip which of the tourist attractions sites did you visit?

Site _____No. of nights ____, Site _____No. of nights _____, Site _____No. of nights ____

Site _____ No. of nights ____, Site _____ No. of nights ____, Site _____No. of nights ____

Site _____ No. of nights ____, Site _____ No. of nights _____, Site _____ No. of nights _____

Site _____ No. of nights ____, Site _____ No. of nights _____, Site _____ No. of nights _____

15. Total number of nights stay _____

Ministry of Culture & Tourism Page 1

TOUR EXPENDITURE

16. The amount of money you pre-paid if you are on a package tour? Amount _____

17. How many persons does this pre-paid tour covers or includes? No. of persons _____

18. How much did you spend in Ethiopia during this trip ? (Please give your best estimate incase you do not remember the exact figures) Amount _____

19. Please give the breakdown of your expenditure

	Amount	Currency
Accommodation Services		
Food and Beverages		
Transportation Services		
Shopping: Souvenirs , Handicrafts		
Tour operators		
Entrance fee (including Photo & Video Camera Permission fees)		
If other, please specify,		

EVALUATIONS

20. Rating of your experience of the following items

	Excellent	Very Good	Good	Satisfactory	Poor
Safety & Security					
Accommodation Services					
Food and Beverages					
Transportation Services					
Internet and Telephone Services					
Foreign Exchange Services					
Shopping Centres: Souvenirs , Handicrafts					
Historical Attractions					
Nature & Wildlife Attractions					
Cultural Attractions					
Language Capabilities					
Evaluation of Tour Operators					
Hygiene					

21. On overall basis, how satisfied or dissatisfied are you with your visit to Ethiopia?

Very Satisfied [ ] Satisfied [ ] Fair [ ] Dissatisfied [ ] Very Dissatisfied [ ]

22. How was your stay compared to your Expectation?

Very Satisfied [ ] Satisfied [ ] Fair [ ] Dissatisfied [ ] Very Dissatisfied [ ]

23. Would you visit Ethiopia again?

Yes [ ] No [ ] Maybe [ ]

24. Do you intend to write on a social website about your trip to Ethiopia?

Yes [ ] No [ ] Maybe [ ]

25. Would you recommend Ethiopia to others?

Yes [ ] No [ ] Maybe [ ]

22. Please give comments regarding your travel and suggestions for improvement of tourist services:

_____

_____

_____

Thank you very much!

Ministry of Culture & Tourism Page 2

APPENDIX D2- INTERNATIONAL VISITORS ARRIVAL BY COUNTRY OF RESIDENCE - 2019

COUNTRY OF RESIDENCE	COUNT	PERCENT
TOTAL	**811,604**	**100.00**
AFRICA	**243,674**	**30.04**
East Africa	**83,506**	**10.30**
Djibouti	11,989	1.48
Eritrea	1,148	0.14
Kenya	27,258	3.36
Malawi	5,776	0.71
Rwanda	5,565	0.69
Somalia	5,368	0.66
Tanzania, United Republic of	8,986	1.11
Uganda	10,620	1.31
Zimbabwe	6,796	0.84
Central Africa	**6,922**	**0.85**
Chad	6,922	0.85
North Africa	**23,455**	**2.89**
Sudan	23,455	2.89
Southern Africa	**17,171**	**2.12**
South Africa	17,171	2.12
West Africa	**34,312**	**4.23**
Ghana	7,316	0.90
Mali	4,058	0.50
Nigeria	22,938	2.83
Other Africa	**78,308**	**9.65**
Other countries of Africa	78,308	9.65
AMERICAS	**160,524**	**19.78**
North America	**153,162**	**18.87**
Canada	20,278	2.50
United States of America	132,884	16.37
Other Americas	**7,362**	**0.91**
Other countries of the Americas	7,362	0.91
EAST ASIA AND THE PACIFIC	**66,093**	**8.13**
North Easr Asia	**49,744**	**6.12**
China	41,837	5.15
Japan	4,800	0.59
Korea, Republic of	3,107	0.38
Sourth East Asia	**2458**	**0.30**
Philippines	2,458	0.30

COUNTRY OF RESIDENCE	COUNT	PERCENT
Australia	**8,140**	**1.00**
Australia	7,073	0.87
New Zealand	1,067	0.13
Other East Asia and The Pacific	**5,751**	**0.71**
Other countries of Asia	4,719	0.58
Other countries of Oceania	1,032	0.13
EUROPE	**242,500**	**29.89**
Central/Eastern Europe	**2504**	**0.31**
Russian Federation	2,504	0.31
Northern Europe	**72,956**	**8.99**
Denmark	3,954	0.49
Finland	3,330	0.41
Norway	7,374	0.91
Sweden	15,003	1.85
United Kingdom	43,295	5.33
Southern Europe	**31,317**	**3.86**
Greece	1,670	0.21
Italy	29,647	3.65
Western Europe	**99,978**	**12.32**
Austria	4,244	0.52
Belgium	8,128	1.00
France	25,623	3.16
Germany	36,858	4.54
Netherlands	14,667	1.81
Switzerland	10,458	1.29
East Mediterranean Europe	**15,861**	**1.96**
Israel	11,571	1.43
Turkey	4,290	0.53
Other Europe	**19,884**	**2.45**
Other countries of Europe	19,884	2.45
MIDDLE EAST	**70,312**	**8.67**
Egypt	5,173	0.64
Kuwait	2,738	0.34
Saudi Arabia	24,221	2.98
United Arab Emirates	14,760	1.82
Yemen	9,820	1.21
Other countries of Middle East	13,600	1.68
SOUTH ASIA	**28,501**	**3.51**
India	26,171	3.22
Pakistan	2,330	0.29

Appendix D3- International Visitors Arrival By Purpose of Visit - 2019

MONTHS	PURPOSE OF VISIT						TOTAL	%
	BUSINESS	CONFERENCE	LEISURE & HOLIDAYS	TRANSIT	VISITING FRIENDS & RELATIVES	NOT STATED		
1st Quarter	30,667	21,356	63,796	28,047	15,685	24,880	184,432	30.11
January	9,499	8,587	21,510	9,372	5,362	8,443	62,773	10.25
February	10,828	8,000	22,337	8,550	4,961	7,945	62,620	10.22
March	10,340	4,769	19,949	10,126	5,362	8,492	59,039	9.64
2nd Quarter	36,165	13,891	75,556	34,539	16,379	28,442	204,973	33.47
April	11,188	4,822	23,428	12,091	5,742	9,712	66,983	10.94
May	12,825	4,887	25,004	10,751	5,649	9,057	68,174	11.13
June	12,152	4,182	27,124	11,697	4,988	9,673	69,816	11.40
3rd Quarter	26,689	9,679	86,357	64,577	12,680	23,071	223,053	36.42
July	10,170	3,630	33,544	18,198	4,514	8,731	78,787	12.86
August	9,122	3,168	30,356	24,971	4,274	7,822	79,713	13.02
September	7,396	2,881	22,458	21,408	3,892	6,518	64,553	10.54
4th Quarter	26,027	12,088	78,238	56,271	9,393	17,130	199,145	36.42
October	9,007	3,588	26,496	19,311	3,042	5,423	66,866	12.86
November	9,484	4,473	26,324	17,254	3,224	5,881	66,640	13.02
December	7,536	4,027	25,418	19,706	3,127	5,826	65,639	10.54
Total	**119,548**	**57,013**	**303,948**	**183,434**	**54,138**	**93,524**	**811,604**	100.00
%	5.88%	1.81%	46.36%	34.91%	5.11%	5.93%	100.00%	

Appendix D4- International Visitors Exit Survey Results Highlight - 2029

Table - 1 Country of Residence of Respondents

Country of Residence	Count	Percent
African	66	6.0
Americas	270	24.6
Europe	564	51.5
Middle East	41	3.7
Asia	139	12.7
Oceania	16	1.5
Total	**1,096**	**100.0**

Table - 2 Sex of Respondents

Sex	Count	Percent
Female	359	32.8
Male	688	62.8
Not Stated	49	95.5
Total	**1,096**	**100.0**

Table - 3 Age Of Respondents

Age	Count	Percent
< 19	5	0.5
20-29	156	14.2
30-39	245	22.4
40-49	190	17.3
50-59	180	16.4
60-69	145	13.2
70-79	59	5.4
>80	11	1.0
Not-Stated	105	9.6
Total	**1,096**	**100.0**

Table - 4 Arrivals by Carriers

Name of the Airline	Count	Percent
British Airways	2	0.18
Emirates Airways	10	0.91
Kenyan Airways	13	1.19
Royal Dutch Airlines	1	0.09
Ethiopian Airlines	815	74.36
Egypt Air	2	0.18
Turkish Airlines	121	11.04
Lufthansa Airlines	111	10.13
United Airline	1	0.09
South African Airways	5	0.46
Qantas	2	0.18
Saudi	7	0.64
Air China	2	0.18
Malaysia Airlines	1	0.09
Austrian Airlines	2	0.18
Not Stated	1	0.09
Total	**1,276**	**100.0**

Table - 5 History of Visit

History of Visit	Count	Percent
Repeat Visitors	562	51.28
First Time Visitors	526	47.99
Not Stated	8	0.73
Total	**1,096**	**100.0**

Table - 6 Purpose of Visit

Purpose of Visit	Count	Percent
Business	359	28.13
Conference	62	4.86
Leisure and Holidays	558	43.73
Visiting Friends and Relatives	221	17.32
Other	76	5.96
Total	**1,276**	**100.0**

Table - 7 Motivation For Travel

Motivation For Travel	Count	Percent
Nature and Wildlife	319	32.35
Cultural Life	310	31.44
History	281	28.50
Other	76	7.71
Total	**986**	**100.0**

Table - 8 Travel Arrangement

Motivation for Travel	Count	Percent
Package Tour	234	21.4
Non-Package (Self-arranged)	862	78.6
Total	**986**	**100.0**

Table - 9 Source of Information

Source of Information	Count	Percent
Tourism Fair	30	2.12
Travel Agency	157	11.08
Internet or Social Media	429	30.28
Ministry Website	48	3.39
Newspaper	15	1.06
Friends and Relatives	453	31.97
Travel Books	243	17.15
Ethiopian Embassy	42	2.96
Total	**1,417**	**100.0**

Table - 10 Package Tours Items

Package Tours Items	Count	Percent
Accommodation	203	17.82
Food and Beverages	152	13.35
Guided Tour	156	13.70
Local Air and Ground Transport	153	13.43
International Transport	123	10.80
Tour Guide for Entire Trip	131	11.50
Attractions	102	8.96
Travel Insurance	63	5.53
Events and Entertainments	51	4.48
Other	5	0.44
Total	**1,139**	**100.0**

Table - 11 Travel Party

Travel Party	Count	Percent
Spouse or companion	155	13.95
Friends	188	16.92
Family	137	12.33
Traveling Alone	487	43.83
Business Associates	144	12.96
Total	**1,111**	**100.0**

Table - 12 Type of Accommodations

Type of Accommodations	Count	Percent
Starred Hotel	623	44.15
Un-Starred Hotel	202	14.32
Guest House	222	15.73
Resort Lodges	130	9.21
Friends and Relatives	171	12.12
Other	63	4.46
Total	**1,411**	**100.0**

Table - 13 Types of Domestic Transportations

Types of Domestic Transportations	Count	Percent
Additional Air Transportation	409	21.84%
Mini-Bus	616	32.89%
Bus	135	7.21%
4WD Car	650	34.70%
Other	63	3.36%
Total	**1,873**	**100.0**

Table - 14 Distribution of Overnight Stays of Visitors in Ethiopia

Regions	Days/ Nights	Percent
Gambela	15	0.11
Benishangul-Gumuz	39	0.29
Somalia	45	0.34
Dire-Dawa	72	0.54
Harari	172	1.30
Afar	389	2.94
Oromia	985	7.44
SNNPR	979	7.40
Tigray	1,017	7.68
Amhara	2,412	18.23
Addis Ababa	7,109	53.72
Total	**13,234**	**100.0**

Table - 15 Length of Stay/nights and Expenditure: National Average

	Average Total No. of Days/Nights Stay	Average Amount Spent in Ethiopia In USD	Package Tour Average Expenditure USD
Mean	12.09	$1,543.86	$549.46
Median	8.00	$800.00	0.00
Mode	2	-	-
Std. Deviation	16.73	$3,556.87	$1,357.37
Minimum	-	-	-
Maximum	240	$68,500.00	$12,000
Sum	**13,234**	**$1,690,527.49**	**$601,107**

Table- 16 Length of Stay/nights and Expenditure: National Average

	Average Total No. of Days/Nights Stay	Average Amount Spent in Ethiopia in USD	Package Tour Average Expenditure USD
Mean	12.09	$1,543.86	$549.46
Median	8.00	$800.00	0.00
Mode	2	-	-
Std. Deviation	16.73	$3,556.87	$1,357.37
Minimum	-	-	-
Maximum	240	$68,500.00	$12,000
Sum	**13,234**	**$1,690,527.49**	**$601,107**

Table-17 Length of Stay/nights and Expenditure: National Average

Average Expenditure		Package Tour			Non-Package Tour	
Average Nights Stay of per Visitor	Average Expenditure spent per Visitor in Ethiopia $	Average Package Expenditure per Visitor $	Additional Average Expenditure spent per Visitor in Ethiopia$	Average Nights Stay of per Visitor	Average Expenditure spent per Visitor in Ethiopia $	Average Nights Stay of per Visitor
12.09	**127.74**	**2,366.75**	**673.78**	**13.29**	**1,779.04**	**11.76**

Table - 18 Length of Stay/nights and Expenditure by Region of Residence : National Average

Region	Average Expenditure		Package Tour			Non-Package Tour	
	Average Nights Stay of per Visitor	Average Expenditure spent per Visitor in Ethiopia $	Average Package Expenditure per Visitor $	Additional Average Expenditure spent per Visitor in Ethiopia$	Average Nights Stay of per Visitor	Average Expenditure spent per Visitor in Ethiopia $	Average Nights Stay of per Visitor
African	6.26	203.99	2,185.62	287.64	7.40	1,453.09	6.05
Americas	11.71	162.29	2,423.64	758.05	10.54	2,189.68	12.00
Europe	13.12	111.05	2,484.23	584.76	15.82	1,750.81	12.22
Middle East	13.27	88.02	1,696.00	956.60	6.10	1,235.98	15.58
Asia	11.28	120.48	1,212.52	481.92	7.00	1,430.60	11.65
Oceania	9.88	227.24	2,802.50	2,592.23	11.50	2,035.00	8.90

Table - 19 Length of Stay/nights and Expenditure by Purpose of Visit : National Average

Region	Average Expenditure		Package Tour			Non-Package Tour	
	Average Nights Stay of per Visitor	Average Expenditure spent per Visitor in Ethiopia $	Average Package Expenditure per Visitor $	Additional Average Expenditure spent per Visitor in Ethiopia$	Average Nights Stay of per Visitor	Average Expenditure spent per Visitor in Ethiopia $	Average Nights Stay of per Visitor
Business	13.37	136.28	2,022.85	683.17	15.63	1,933.58	13.15
Conference	5	176.36	1,033.33	722.33	4.67	908.87	5.06
Leisure and Holidays	11.78	119.78	2585.27	646.09	13.77	1,802.58	10.78
Visiting Friends & Relatives	83.36	17.20	1,004.87	791.88	10.4	1,497.77	12.87
Other	15	115.76	862.5	789.66	27.6	1,879.82	13.09

Table - 20 Total Expenditure Breakdown

Expenditure Breakdown	Percentage	Averages
Accommodation Services	33.54%	518.45
Food & Beverages	23.70%	365.57
Transportation Services	12.62%	194.93
Shopping: Souvenirs, Handicrafts	11.38%	175.70
Tour Operators	5.71%	88.16
Entrance Fee (including photo & Video Camera Permission fees)	2.32%	35.67
Other	10.72%	166.94
TOTAL	**100.00%**	

Table - 21 Evaluations of Tourism Related Services

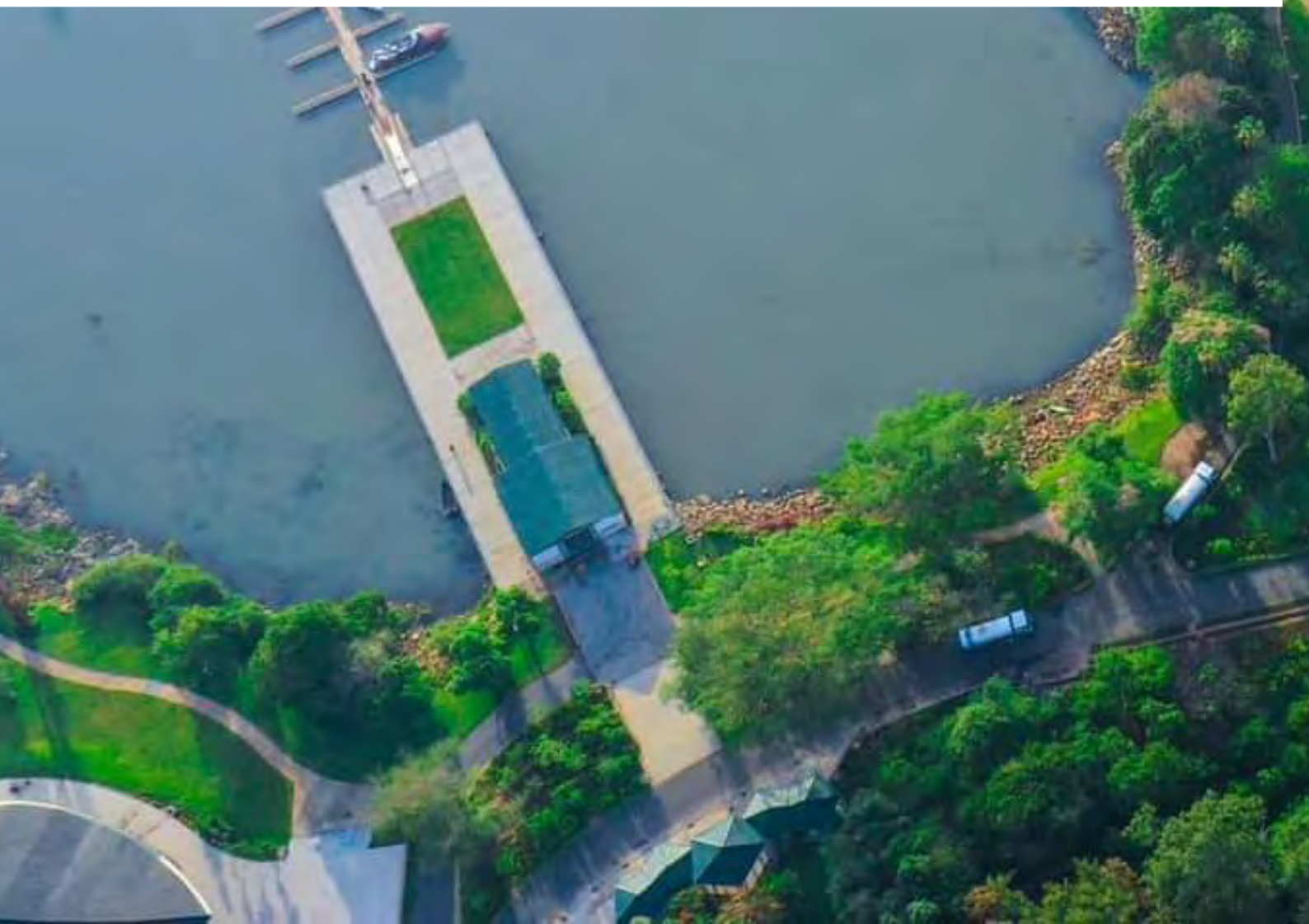
Item	Excellent	Very Good	Good	Satisfactory	Poor	Not Evaluated	Total
Safety and Security	21.26%	34.67%	25.00%	11.04%	4.93%	3.10%	100.00%
Food and Beverages	22.90%	30.57%	30.29%	9.85%	2.65%	3.74%	100.00%
Transportation Services	14.78%	25.82%	32.21%	13.32%	6.75%	7.12%	100.00%
Internet and Telephone Services	5.11%	9.67%	24.73%	26.55%	26.55%	7.39%	100.00%
Foreign Exchange Services	9.49%	19.71%	28.28%	14.05%	8.30%	20.16%	100.00%
Shopping Centers: Souvenirs, Handcrafts	10.31%	20.53%	29.11%	13.14%	3.83%	23.08%	100.00%
Tour Operators and Travel Agencies	13.87%	16.06%	14.60%	7.57%	2.55%	45.35%	100.00%
Guiding Services	16.79%	17.88%	16.15%	7.03%	2.65%	39.51%	100.00%
Language Capabilities	14.32%	26.92%	25.46%	13.05%	4.38%	15.88%	100.00%
Historical Attractions	25.64%	25.64%	13.69%	4.11%	1.82%	29.11%	100.00%
Nature and Wildlife Attractions	27.55%	22.45%	11.86%	4.29%	1.19%	32.66%	100.00%
Cultural Attractions	26.28%	24.64%	12.68%	4.65%	1.55%	30.20%	100.00%
Hygiene and Sanitation Issues	5.11%	4.01%	15.51%	25.91%	40.24%	9.22%	100.00%

Table - 22 Evaluations of Overall Satisfaction

Overall Satisfaction	Percentage
Very Satisfied	38.23
Satisfied	48.08
Fair	11.04
Dissatisfied	2.10
Very Dissatisfied	0.55
Total	**100.00**

Table - 22 Evaluations of Overall Satisfaction

Items	Response			Total
	Yes	No	Maybe	
Would you visit Ethiopia again?	77.55%	4.29%	18.16%	100%
Intent to write on social media about your trip	42.43%	32.03%	25.55%	100%
Would you recommend Ethiopia to others?	84.49%	2.65%	12.86%	100%



INTERNATIONAL TOURISM SURVEY 2024

ቱሪዝም ሚኒስቴር
MINISTRY of TOURISM

Ethiopia
LAND OF ORIGINS

Federal Democratic Republic of Ethiopia
Ministry of Tourism
Kirkos sub-city, Addis Ababa, Ethiopia
www.mot.gov.et www.visitethiopia.travel
(+251) 11 861 9618 (+251) 11 821 2272)

Japan International Cooperation Agency

BASIC STUDY ON TOURISM SECTOR IN ETHIOPIA

Final Report (F/R)

SUBMITTED TO

JICA ETHIOPIA OFFICE

MEK Hive Consulting Group PLC

March 10, 2023

Table of Contents

List of Tables iii

List of Figures iii

List of Acronyms iv

Executive Summary v

1. Introduction 1

1.1 Background of the study 1

1.2 Objectives of the study 6

1.3 Scope of the study 6

1.4 Operational Definitions 7

1.5 Limitations of the Study 7

1.6 Organization of the Study 8

2. Methodology of the Study 9

2.1 Description of the Study Area 9

2.2 Study Design 10

2.3 Data Collection Method 10

2.3.1 Desk review 10

2.3.2 Key Informant Interviews (KII) 10

2.3.3 On-site observation 11

2.4 Sampling Method and Size 11

2.5 Data Analysis 12

3. Result and Discussion 13

3.1 Government Organizations 13

3.1.1 Ministry of Tourism (MoT) 13

3.1.2 Addis Ababa Culture, Arts and Tourism Bureau (AACATB) 17

3.1.3 Ethiopian Convention Bureau (ECB) 20

3.2 Tourism Association and Academic institutions 21

3.2.1 Tourism Associations 21

3.2.2 Tourism Educational Institutions 23

3.3 Tourism Enterprises 27

3.4 Development Partners 33

3.4.1 CBI 34

3.4.2 UNDP 34

3.4.3 European Union (EU) 35
3.4.4 Master Card Foundation 35
3.4.5 World Bank 35
3.5 Tourism sites in Addis Ababa 36
3.6 Tourism Activities in Addis Ababa 47
3.7 Tourism Products in Addis Ababa 51
3.8 Attractiveness of Addis Ababa as Tourist Destination 53
3.8.1 Tourism Potential and Opportunities 54
3.8.2 Model city tour for Addis Ababa 55
4. Conclusions and Recommendations 57
4.1 Conclusions 57
4.2 Recommendations 60
5. References 63
6. Annexes 64
Annex 1: Addis Ababa Culture, Arts and Tourism Bureau Registered Heritages sites 64
Annex 2: Semi Structured Interview Guidelines and Checklists for Tourism Players In Addis Ababa 70
Annex 3: List of Persons and Organizations Contacted for Survey and KII 72
Annex 4: Location Coordinates of Tourist Sites 75

List of Tables

Table 1 Source of data and Sampling size 11
Table 2 Number of Addis Ababa city Visitors and Revenue Generated (2021/22) ... 20
Table 3 Ethiopian Tourism and Hotel Professionals Associations 22
Table 4 Tourism Education Institutions 24
Table 5 List of sample Tour operators 29
Table 6 Souvenirs and Art galleries 30
Table 7 Cultural centers and traditional restaurants 30
Table 8 Development Partners Role in Tourism Development in Ethiopia 33
Table 10 List of Tourism Sites 39
Table 11 List of Tourism Activities in Addis Ababa 47
Table 12 Major Festivals in Addis Ababa 50
Table 13 List of Tourism Products 52

List of Figures

Figure 1 Tourist Arrivals and Revenue 4
Figure 2 MICE Tourist Arrivals by Purpose 5
Figure 3. Geographic Description of the Study Area 9
Figure 4 Organogram of Ministry of Tourism 16
Figure 5 Addis Ababa Culture, Art & Tourism Bureau Organogram 19
Figure 6 Proportion of Tourist Destinations in Addis Ababa 37
Figure 7 Major Tourism Attraction Sites in Addis Ababa (See Annex 4 for Location Coordinates of each Site) 46

List of Acronyms

AACATB	Addis Ababa Culture, Arts and Tourism Bureau
AAU	Addis Ababa University
AU	African Union
CBI	The Centre for the Promotion of Imports from developing countries (CBI) (a department of the Netherlands Enterprise Agency
DPs	Development Partners
UNECA	United Nations Economic Commission for Africa
ECB	Ethiopian Convention Bureau
ETO	Ethiopian Tourism Organization
ECTT	European Council on Tourism and Trade
ETTC	Ethiopian Tourism Transformation Council
ESTDP	Ethiopia Sustainable Tourism Development Project
GIZ	The German Agency for International Cooperation
GoE	Government of Ethiopia
HRF	Haile Mariam Roman Foundation
JICA	Japan International Cooperation Agency
KII	Key Informant Interview
KFW	Kreditanstalt Für Wiederaufbau (German Development Bank).
MICE	Meetings, Incentives, Convention and Exhibitions
MOCT	Ministry of Culture and Tourism
MOT	Ministry of Tourism
PHE	Population Health Environment
STMP	Sustainable Tourism Master Plan
TVET	Technical and Vocational Education and Training
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNDP	United Nations Development Program
UNWTO	United Nation World Tourism Organization
WTO	World Tourism Organization
WTTC	World Tourism and Travel Council

Executive Summary

Tourism has been one of the fastest growing sectors in the world. Similarly it has shown remarkable growth in Ethiopia in general and Addis Ababa in particular. This study, commissioned by Japan International Cooperation Agency (JICA) and conducted in Addis Ababa The study collected basic information on tourism sector in Ethiopia, with a particular focus to Addis Ababa city to grasp current tourism situation and to plan for any possible future interventions.

To realise the objective, the study employed both quantitative and qualitative research method. The study covered a total of 81 sample respondents from key players on tourism sector in the city as well as assessed 32 tourism sites.

The study assessed the key tourism players in Addis Ababa including government institutions, Tourism enterprises (public and private), Development partners, Tourism Associations, Tourist sites, Tourism colleges and Universities (public and Private) and examined key actors' tasks, future plans, issues and challenges; identification of existing and potential tourist sites, activities and products; assessed the hard and soft tourism infrastructure and its challenges; and made analysis on Addis Ababa city tour programs and recommendation for its improvement.

The study find out that Addis Ababa tourism industry is hindered by infrastructure inadequacies, conservation and destination development problems, low budget, lack of development partner, inadequate accommodation and conference halls, weak product development activity, poor marketing and promotional platforms, poor interpretation and inconsistent information provision, and limited supply and quality of training services.

The study highlights the challenges faced by key players on tourism in the city such as Association, and Tourism enterprises, Colleges/Universities: Covid-19 pandemic

and security situations, lack of finance, and lack of market and high overhead cost of operation, and inadequate tourism policy and support.

The observation of the tourist sites identified the lack of conservation work and follow up, limited facilities, inadequate interpretation and signage, and lack of skilled professional as major challenges.

Recommendations

Capacity Building and Training

- *The development partners should work on capacity building and training together with Government tourism Institutions, Associations, Tourism Players and Academic Establishments mainly on Heritage conservation, destination Marketing and promotion, Tourism Product Development, Tourist commodity production, MICE Tourism development, digital marketing, Tourism statistics application and management, Tourism Leadership, Service quality Management, KAIZEN System, Japanese language and tourist behaviour.*
- *The AACATB should engage in tourism awareness creation programs for local communities to encourage visiting habits, participate and contribute in conservation of the sites.*
- *The development partners together with government institutions (both MOT and AACATB) should provide Tourism and Entrepreneurship training for the unemployed host community to create jobs and generate income.*
- *The development partner could support in training and development of tourist commodity production, machinery support and technology transfer so as to enhance the quality production tourist handicrafts, leather, pottery, traditional cloth and wooden items.*
- *The development partners could support the academic establishments in by providing adequate training resources and materials for workshops, practical*

labs and class rooms. And also providing human capacity and skill trainings and scholarships that can enhance quality training delivery.

Policy and Regulation

- *The government institutions should plan and implement a Tourism Recovery strategy. The tourism industry has suffered more than any other sector due to COVID-19 pandemic and the resulting global economic recession; and the continued peace instability in the country. The recovery strategy should be revised that could fully support the tourism enterprise to reignite their operation. This recovery strategy should also include simplify visa, airport and customs procedures to attract many tourists and generate revenue; and offer incentives to help enterprises recover through long-term loans with low interest rates; and financial grants.*
- *The concerned body in the education sector should set clear and consistent accreditation and evaluation standards for tourism academic establishments.*
- *The government tourism institutions both MOT and AACATB should work in collaboration to ensure uniformity of tourism standard services, place skilled professionals for various tourism positions, and improving security situation in the sites.*
- *The AACATB should prepare strategic documents such as Addis Ababa tourism development strategy, Domestic Tourism strategy, MICE tourism strategy, Marketing Strategy with the support of development partners, adequate budget from the government and private sector involvement.*
- *The AACATB should give proper PPP and alliance with development partners by formalizing agreements/memoranda of understanding (MoUs) regarding joint tourism development programs, projects and financing; and developing infrastructure at tourist sites.*
- *Tourism governance and Coordination is one of the most lacking but the most needed tool for the whole tourism development in Addis Ababa. This should*

be ensured by addressing mandate conflicts, overlaps and gaps in implementing the AACATB planned activities.

- *Tourism product pricing is another sticking issue because of irregular and instant changes in prices of services and entrance fees that needs to be tackled to ensure the sustainable business, competitiveness and providing value for money tourists. This should be supported through communication with the tourism enterprises and associations.*

Tourism Destination Development

- *The AACATB should undertake tourism resource mapping, identification and inventory of tourism sites, activities and products to utilize the existing and potential of the city tourism.*
- *The AACATB should implement tourism statistical data collection and management in tourism business to plan hard and soft infrastructure for tourism development in Addis Ababa.*
- *The tourism enterprises should plan well organized city tour programs and include various potential sites, activities and products to promote, diversify and extend the tourist stay in Addis Ababa.*
- *The tourism key players shall intervene in tourism product development to diversify the tourist sites, activities and products and make Addis Ababa more attractive for tourists, create job opportunities and income generation.*
- *The key tourism players should involve in improving tourist facilities and services in tourist sites especially in museums and monuments by placing proper signage, rest stops, watching towers, toilets, displays, visitor information and interpretation.*
- *The development partners and government tourism institutions could support the academic establishments who provide hotel and tourism trainings in fulfilling practical labs, resources and facilities that can enhance quality trainings and well skilled professionals.*

- *The key actors should work in collaboration in infrastructural development in and around the tourist sites in Addis Ababa.*
- *The AACATB should plan financing and fund raising strategies to utilize stake holder contributions.*

Marketing and Promotion

- *The AACATB should use and implement various marketing and promotion platforms in both domestic and international tourism market specially use of technology and digital marketing platforms.*
- *The AACATB should give priority and develop the MICE, Stop over tourism and domestic tourism as competitive advantage for Addis Ababa.*
- *Despite Addis Ababa has a brand name 'The Vibrant Hub of Africa'. all tourism key players should work together to implement and communicate the brand as it really represents the city.*
- *The marketing and promotional documents should be placed at tourist information centre, Bole Airport, African Union, Meskel Square, star hotels, Train stations and other entry points to Addis Ababa.*
- *The AACATB should undertake regular conservation work for tourism sites, monuments and historical houses.*
- *The AACATB should conduct continues tourism research to develop the city's tourism.*

.

1. Introduction

1.1 Background of the study

Tourism has been one of the most important and the second fastest growing sector in the world. The economic and financial benefit of tourism can range from foreign exchange earnings, employment generation, stimulation of infrastructure development, and contribution to local economy. Globally Travel & Tourism contributed $8.8 trillion to the global economy (10.4% of global GDP) and also across the world, more than 319 million jobs were supported by the sector in 2018 which represents 10.0% of all employment, worldwide (Master plan, World Travel & Tourism Council, 2019).

Tourism is one of the swift growing industries in Ethiopia, particularly in Addis Ababa. According to reports, Ethiopia was the fastest growing country (growing by 48.6%) in the world in terms of Travel & Tourism GDP and it contributed $7.4 billion to the Ethiopian economy in 2018. The sector supported 2.2 million jobs, or 8.3% of total employment. The total GDP contribution is forecasted to rise and reach 9% of GDP by 2024 (Ibid).

It is widely acknowledged that Ethiopia possesses remarkable tourism potential in its unique and largely unexplored cultural, historical, and archaeological and natural resources. The major contribution of the tourism sector to Ethiopia's economy is supported by a steady increase in international arrivals which is forecasted to total 815,000 by 2024 (Master plan).

ADDIS ABABA አዲስ አበባ	
CHARTERED IN 1986	
Mayor of Addis Ababa	Adanech Abiebie
Area Capital Land	527 km² (203 sqmi)
Elevation	2,355m (7,726ft)
Population	5,005,524
Time Zone	UTC +3
Coordinate	901'48" N | 38044'24"E
Area Code(s)	+251(11)

Cognizant of this fact the government has put the Tourism sector among the top 5 priority sectors in the country's 10-year development plan as a priority sector, as designated by the government and aided through various policy initiatives and funding mechanisms (MOCT, 2020).

Though there were key endeavours and commitments on tourism development at various degrees by the past Ethiopian regimes, there has never been such higher level of political commitment in the history of tourism development in the country. This can be reflected that current Ethiopian PM Dr. Abiy Ahmed had given due attention to the tourism sector as can be seen from the development of parks in different parts of Addis Ababa. The newly opened Entoto Park, Friend ship square, Unity Park and science museum, adds value and option for visitors experience in Addis Ababa specially it could encourage domestic, MICE and stop over tourism. The construction of other 3 Mega tourism attractions in three regions (Oromiya, Amhara & SPNNRS regions) is under way (Tourism Ethiopia, 2021).

The government of Ethiopia draft tourism policy states objectives and strategies for the sector. It calls for improved infrastructure in tourist sites; better public and private sector human resources, strengthened supply chains, higher quality and standards of goods and services offered to tourists; and more effective marketing and promotion of tourism products. Adequate resources to effectively deploy strategies targeted at these objectives are still insufficient; and external assistance, both financial and technical, is expected to play a critical role in realizing the policy's objectives. Through support to the tourism sector, there is an opportunity to accelerate growth through focused interventions that leverage the government of Ethiopia strategic choices in areas that can generate jobs and incomes while fostering local development (MOT, 2021).

The following main targets have been set to achieve the objectives of the tourism development plan for the coming ten years (2020/21-2029/30): to increase the number of institutions that provides tourist services from 1,348 to 2,696 and the

level of tourists' satisfaction from 50% to 75%; to develop and make accessible 59 new tourist destinations, in addition to adding value to 40 existing ones; to raise the number of domestic tourists from 24 million to 70 million through aggressive promotion and developing a culture of tourism; to increase the proportion of people who received training in hotel and tourism management services from 23% to 59%; to raise the number of job opportunities created through tourism development from 1.6 million to 5.2 million; and to increase the number of international tourists from 850,000 to 7.3 million.

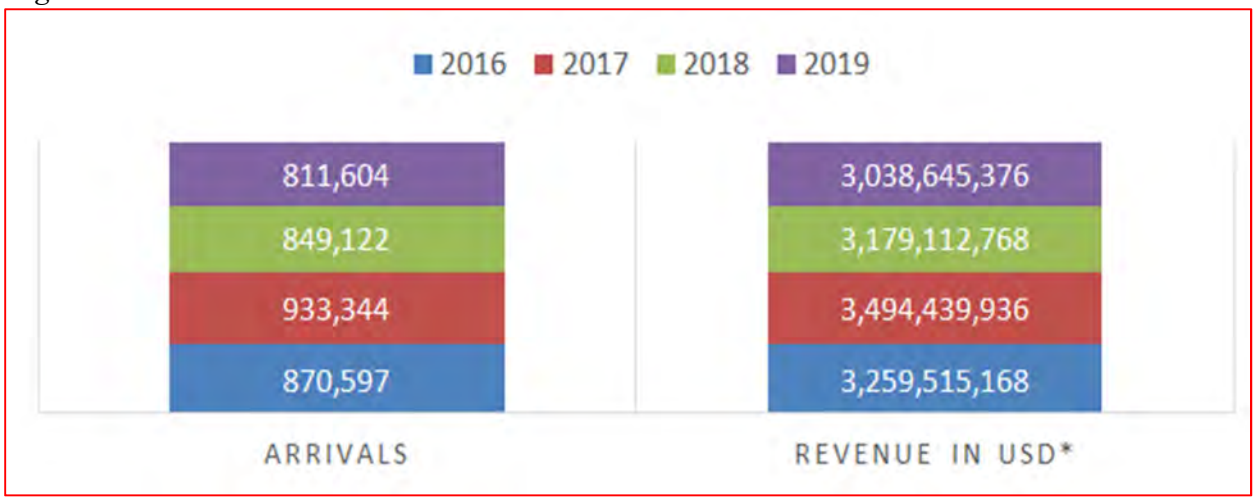
Addis Ababa is a preferable destination, with tourism sites ranging from full heritage sites, including old palaces, churches, mosques, monuments, historical houses, caves, parks and famous markets like Mercato and Shiromeda, to state of the art architecture and museums. The headquarters of African union (AU), many worldwide international organizations, and embassies makes visitors to come for diplomatic and business purposes. In addition, the city has many worthwhile natural and man-made attractions such as cultural-heritage tourism, community-based tourism, sports tourism (marathon), paleontological tourism, bird-watching tourism, agro-tourism, and religious tourism, among others contributes to the huge potential of the sector in the city (Yechale, 2019).



Source: MOCT, 2021

As shown in the above graph international tourist arrivals to Addis Ababa has been increasing until 2017 and started to decline thereafter due to combined effects of internal political developments and COVI 19.

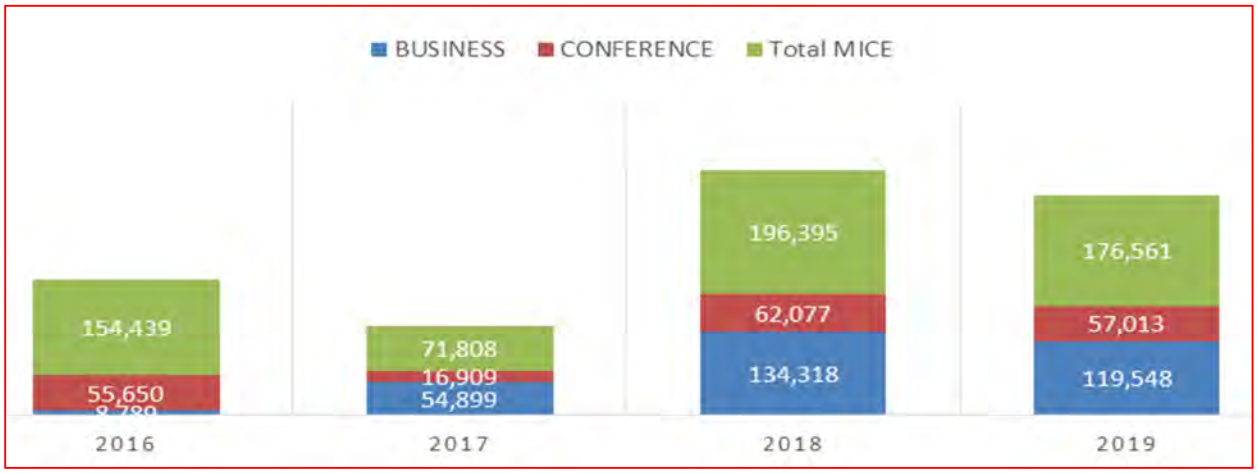
Figure 1 Tourist Arrivals and Revenue



Source: MOCT database, 2021

As shown in the graph above, 2017 had the highest number of arrivals as well as the highest revenue. Both figures declined in the following years, mainly due to the impact of internal political developments and COVID 19. Addis Ababa has a comparative advantage for MICE, stop over and domestic tourism as the seat of the headquarters of the African Union (AU) and the United Nations Economic Commission for Africa (UNECA). It is also the third city with the highest number of diplomatic missions in the world; world class meeting venues of the African Union Congress Centre (AU-convention facilities) and the UNECA, together with international standards hotels like Sheraton, Radisson, Hilton and many others. Bole International Airport is now becoming an increasingly important air hub in Africa. Owing to these conditions, the city has become a leading conference and event tourism destination in Africa.

Figure 2 MICE Tourist Arrivals by Purpose



Source: MOCT, 2020

As can be seen from the above chart, conference arrivals took the largest share in 2016, and in the following years, business arrivals have become the largest source of tourism in the country.

ECTT1 has selected Addis Ababa as world's capital of Culture and Tourism for 2019. By this recognition of Addis Ababa as World Capital of Culture and Tourism, the capital city of Ethiopia is added on the world`s list of cities leading humanity into development and using culture and tourism as fundamentals for a better life (ECTT, 2019).

The tourism industry in Ethiopian and particularity in Addis Ababa is at infant stage due to poor infrastructural development, lack of tourist facilities, security issues, lack promotion, lack of professional man power in hospitality sector particularly, hotel and other service provisions some of factors for the tourism development (Yechale, 2019).

This study assessed current situations in the Addis Ababa tourism sector focused on the key tourism player's such as government institutions, associations, tourism enterprises, academic establishments and development partners and assessed

1. ECTT: is European Council on Tourism and Trade is a global, multi-stakeholder membership and partnership organization that works with organizations, governments and small-scale entrepreneurs to transform tourism as a tool for development

tasks, issues, challenges and obstacles in tourism development; together with identification and observation of existing and potential sites, activities and products.

1.2 Objectives of the study

The general objective of the study was basic study on Addis Ababa tourism development. The specific objectives the study was:

- To identify key tourism players in Addis Ababa
- To identify the on-going activities, issues and challenges of the tourism key players.
- To assess the tourism hard and soft infrastructure and challenges in Addis Ababa.
- To identify and assess existing and potential tourist sites, activities and products available in Addis Ababa

1.3 Scope of the study

The data collection for the basic study for tourism sector was conducted in the month of February 2023 focusing on the agreed geographic scope for the study, which is the capital city of Ethiopia, Addis Ababa.

The study focused on assessing current tourism situation in Addis Ababa by targeting active players in the sector such as government institutions, tourism enterprises (public and private), development partners, tourism associations, tourist sites, tourism colleges and universities (public and Private) in Addis Ababa.

In this manner, the main tasks of study were on the basic information collection regarding the existing and potential tourism sites and activities in Addis Ababa include;

- Identification of tourist sites in Addis Ababa
- Identification of the major tourist activities in Addis Ababa
- Analysis on Addis Ababa city tour and recommendation for improvement

- Outline recommendation for the model city tour in Addis Ababa

1.4 Operational Definitions

For the purpose of this study and to ensure common understanding, the following operational definitions were used;

- **Tourism:** Tourism comprises the activities of persons travelling to and staying in a place outside their usual permanent place of residence for not more than one consecutive year for leisure, business and other purposes (UNWTO 2015).
- **Travel Agent** is an intermediary whose primary business is to book on a commission basis transportation services along with guiding and translation services, and package tours.
- **Tour and Travel Service** is a business that deals with offering both incoming tour operation and travel agency services combined.
- **Ground Operator** is a business based in a particular region that provides handling and transport services and sells tours including destinations in their area directly to independent tourists.
- **Tourist Transport Services provider** is a business that owns vehicles of international standards and offers short-term, non-scheduled transport services with driver country wide complete incoming tour operators or under direct agreements with customer (MOCT, 2015).

1.5 Limitations of the Study

Since the study focuses on basic information collection in Addis Ababa and it may not include detail analysis of the overall tourism situation in the country. In addition, while undertaking the data collection the consultant encountered the following challenges;

- Difficulty to access and collect information during the data collection period from some of development partners due to strict security protocols and bureaucratic structure.
- Difficulty to contact some of tour operators at office as the tourism activity has significantly declined recently due to the impact of post-COVID-19 pandemic as most offices were closed.

- Some organizations are not willing to give their budget and organisational details.

However, the consultant made all necessary efforts to collect the necessary data through utilizing alternative means including telephone interviews and browsing to respective organization, development partner and enterprises websites and related publications.

1.6 Organization of the Study

This study is composed of four chapters. Chapter one deals with introduction, background, objectives, scopes, limitation, and operational definitions of the study.

Chapter two discuss the research methodology, research approach and design, sample respondents and sites, data collection instruments, reliability and methods of data analysis.

Chapter three presents the results of the study, and analysis and interpretation of data.

Finally, the fourth chapter consists of conclusion and recommendations based on the findings of the study.

2. Methodology of the Study

2.1 Description of the Study Area

The study is conducted in Addis Ababa, Ethiopia's sprawling capital in the highlands bordering the Great Rift Valley. The city located at intersection of 8.9806° N, 38.7578° E is the geographical, political and economic centre of the country. The city is characterized by diverse landscape ranging from its lowest point, around Bole International Airport, at 2,326 meters (7,631 ft.) above sea level in the southern to over 3,000 meters (9,800 ft.) in the Entoto Mountains to the north.

The city which has an area of 540 square kilometers is administratively organized in 11 sub cities. Established more than one hundred forty years ago in 1880s Addis Ababa is characterized by remarkable diversity and tourist attractions which include historical tourist attractions, cultural tourist attractions, Museums, religious festivals, events, archaeological collections ethnographic items from a multitude of different ethnic groups, perfect place to learn about much of Ethiopia and its rich history.

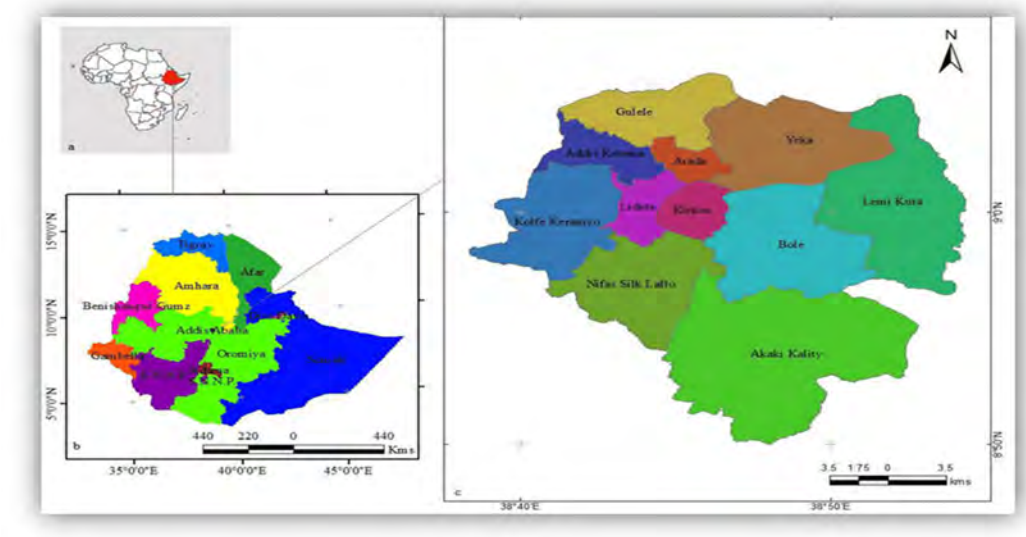


Figure 3. Geographic Description of the Study Area

The city is hub of Bole International Airport. Addis Ababa originally had a railway connection with Djibouti City built more than 100 years ago. But this route has been abandoned and the new Addis Ababa-Djibouti Railway started operation in September 2016, Addis Ababa opened its light rail system to the public on 20 September 2015 which is the first of its kind in sub-Saharan Africa (Dawit, 2018).

2.2 Study Design

To achieve the objectives of the study, the consultant team used both qualitative and quantitative study designs to enrich the result of study. It involves statistical and descriptive design with critical interpretation and analysis of the collected data. In this manner, the study described basic characteristics of tourism in Addis Ababa city, its issues, challenges, practices and strategies and explained the overall conditions of the sector in the city.

2.3 Data Collection Method

The study employed the following data collection methods (desk review, survey, Key Informants Interviews (KIIs) and On-site observation). Their detail description is presented below.

2.3.1 Desk review

The study team made extensive review of available published and unpublished secondary sources from Ministry of Tourism, Addis Ababa Culture, Arts and Tourism Bureau, Proclamation, development partners, associations, colleges/universities, sites, etc. To this end the study team collected secondary data from books, publications, journals magazines, proceedings, pamphlets and articles.

2.3.2 Key Informant Interviews (KII)

KII was used to collect primary data from the key players in the tourism sector in Addis Ababa such as Government organizations, Enterprises, Associations /

Universities, and Development Partners. Semi structured questionnaire was developed and used to conduct the survey.

Key informant interviews were conducted with those who have in-depth knowledge and understanding and current situation of the tourism sector in Addis Ababa. Interview guiding questions were developed and used to facilitate the key informant interviews.

2.3.3 On-site observation

Onsite observation was also used as one of the data collection method to collect primary data from different sites and activities. Observation checklists were used to assess museums, monuments, churches, mosques, palaces, art galleries, historical building, parks, and traditional restaurant.

2.4 Sampling Method and Size

The study applied purposive sampling method for selection of target respondents. In order to get sufficient information and reach at a reasonable conclusion taking enough sample size is crucial. Accordingly, the consultant covered a total of 81 sample respondents from the key tourism players and observed 32 tourism sites and activities described below;

Table 1 Source of data and Sampling size

Date sources	Number	Tools used
Observation of sites	32	Observation checklist
Associations/Universities	11	Questionnaire and KII
Development partners	10	Questionnaire and KII
Government offices	10	Questionnaire and KII
Public /Private enterprises	50	Questionnaire and KII
Total	**113**	

2.5 Data Analysis

The study employed various methods of data analysis to summarize and generate relevant findings that provides the general picture of the existing situation in the tourism sector in Addis Ababa.

Qualitative Data Analysis: *The information collected through the qualitative tools was thoroughly assessed and tabulated to provide the general characteristics of sample target areas with respect to key issues. All the collected qualitative data was analysed by using triangulation, concepts, contents, discourse, opinions, interpretation, compare and contrast methods, and narratives.*

Quantitative Data Analysis: *Quantitative data collected through survey instruments was analysed through the use of descriptive statistics (i.e. percentage and charts) to present the findings. Moreover, the results from these descriptive statistics was presented with summary tables, charts and figures.*

3. Result and Discussion

This section summarises, analyses and discuss the results of the study collected from the key players in the tourism sector in Addis Ababa, which includes: Government Organization, Enterprises, Associations/Universities and Development Partners. It also presents the result from observed tourist sites and activities.

3.1 Government Organizations

Under governmental organizations, the study analysed the data collected from Ministry of Tourism and Addis Ababa Culture, Arts and Tourism Bureau.

3.1.1 Ministry of Tourism (MoT)

The Ministry was established in 2021 as new Ministry separating from the former Ministry of Culture and Tourism as federal tourism organization with Proclamation number 1263/2021. Ministry of Tourism is mandated for policy and legal framework development and implementation, tourism destination development, marketing and promotion, licensing and accreditation, research and training, capacity building, quality control to speed up the tourism development of the country. Besides, proclamation also authorize MoT to develop infrastructure in tourist destination area, which is milestone for infrastructure development that was previously left only to private not to public institutions. To this end, MoT has is undertaking the following core tasks;

- Established Ethiopian Tourism Fund. The Tourism fund is vital to develop tourism in Ethiopia that authorized to levy tax on service provider, to collect tourist tax and to collect endowments and government subsidy.
- Supported regional tourism organizations to brand their respective destination and to develop their website.
- Developing domestic and MICE tourism strategy and is implementing the strategy.
- Allocates partial financial support every year to support tour operators to participate in international travel trade fair.
- MoT with 500 Million ETB capital budget in 2023 expand infrastructure in tourism destination areas by constructing a bridge in Labella, tourist information centre at Bole Air Port departure and arrival area; and erected tourist land mark at Harrar and Dire Dawa.

- Developed domestic tourism strategy intended to bring overall development of tourism sector with more resilient approaches.
- Branded and positioned Ethiopia with a brand and tag line as "The Land of Origin".
- Tourism resource mapping and resource identification to further develop more destinations and diversify attractions with the ultimate objective of ensuring competitiveness.
- MOT built community lodges at Senkele Swaney Hearbeat sanctuary.
- Undertaking conservation work at Rock Hewn churches of Lalibela with the support of France government.
- Developed proposal to get Bale Mountain National Park registered as UNESCO world heritage site.
- Prepared standard documents and protocols for tourism site, community villages and intangible cultural assets for international, registration, recognition and competition. The Ministry recently achieved the Best International Tourism village Award of 2022 for Mulu Eco-lodge which is found in East Gojam.
- The Ministry signed with United Nation Economic Commission for Africa (ECA) to launch Tourism Satellite Account (TSA) for proper measurement of tourism Ethiopia with integrated tourism data.

The Ministry of Tourism is working with development partners to achieve its objectives. These include Master Card Foundations: World Bank, (IFC International Finance Corporation), CBI. (Details about the support of each development partner is described on section 1.4 below under development partners activities)

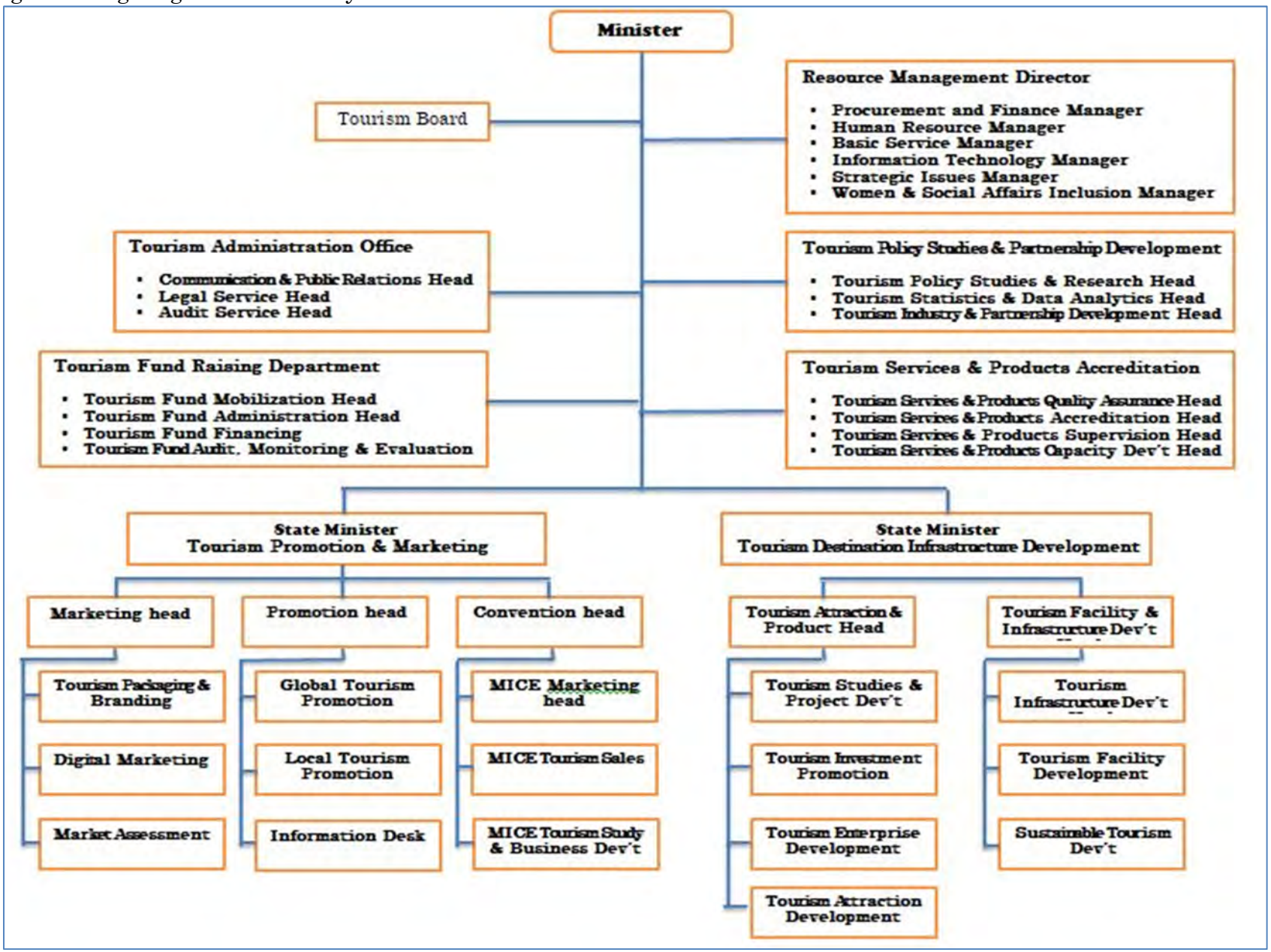
The study respondents from the Ministry of Tourism mentioned the following challenges;

- The available as well as the potential tourism resources in the country are not well studied and mapped.
- Internal conflict and economic global crisis;
- Limited integration among different stakeholders (governmental and non-governmental organizations); very limited integration among national and regional tourism players;
- Limited attentions from key stakeholders for the sustainable development of the tourism in the country as well as limited development partners are engaged in the tourism development.
- Lack of leadership commitment (visionary leader who can transform the sector) even if the sector has got due attention by the government but still it doesn't get the right leaders who really understand the industry;

- Absence of capacity building training for the employees in relation with their job, skill and experience.
- Weak marketing and promotion activities to compete and appeal to the international tourist market.
- Lack of expertise capacity to expand its work in in heritage conservation.

With respect to the financial budgetary situation in the fiscal year 2022/23 annual budget of the Ministry has allocated a total budget of about 140 Million ETB and has 125 employees. The following figure below depicts the Ministry of Tourism organizational structure.

Figure 4 Organogram of Ministry of Tourism



3.1.2 Addis Ababa Culture, Arts and Tourism Bureau (AACATB)

Addis Ababa Culture, Arts and Tourism Bureau is one the government institution established with a goal is to make Addis Ababa one of the top 5 favourite tourist destination and cultural cities in Africa by creating a society that is supportive, beneficiary and responsible for its culture, nature and historical treasures (Source: AACATB).

- ***Mission*** *is creating a generation who loves, protects and develops the city's cultural, natural and historical heritages and using culture and art as a major development tool to promote tourist destination & benefiting the society from it.*

- ***Vision*** *is to study, to preserve and develop culture, historical heritages; natural attractions and arts of the city inhabitants through stakeholder participation to build better image.*

According to their annual report, the Bureau is currently actively engaged in the following core tasks and specific operations:

- **Studying, documentation and audits the tourism resources.**
  - ✓ Identifies and registers tourist sites of the city.
  - ✓ Creates awareness to the public by sponsoring domestic travellers
  - ✓ Audits tourist sites of city in order to identify the strength and weakness.

- **Developing new tourism products and tourism sites.**
  - ✓ Developed Addis Ababa tourism brand named "The Vibrant Hub of Africa" and is promoting this brand with different media outlets.
  - ✓ Identify and develop a new tourist site which was once the military camp where ex-freedom fighter and president of South Africa (Nelson Mandella) trained (On-going).

- **Promotion of MICE and domestic tourism.**
  - ✓ Promoting domestic tourism with awareness creation campaign
  - ✓ Formulating marketing and MICE Tourism strategy (at the planning stage)

- **Undertaking marketing and promotion of the city's tourism product to tourists;**
  - ✓ Developing Smart Tourism Mob App together with Was Branding Company (On-going).
  - ✓ Distributes different promotional materials at big events, Ethiopian Great Run and African Union Summit.

- **Conducting capacity building of the tourism sector in Addis Ababa;**
- **Provide Licensing and Accreditation for newly opening tourism business companies**
  - ✓ Licensing and regulation of hotels; and star rating tourist service providers; establish and supports and follow-up local associations in the tourism sector;
- **Standardizing the service level of existing tourism enterprises, follow up and controlling the quality of their services.**
  - ✓ Organizing domestic clubs, associations, Local hiking tours and support with finance, logistics and professional support.
- **Maintaining safety and security of tourists by collaborating with other sector offices (such as Addis Ababa Police).**
- **Sourcing, accumulating and availing tourism information for tourists and other stakeholders.**
  - ✓ Developed Addis Ababa city tourist map which indicates tourist sites and placed in different part of Addis Ababa
  - ✓ Established tourist information centre at Bole International Airport and Yeka sub city.

With respect to its organizational structure, AACATB is organized under a Director with 3 Vice Directorates (i.e. Culture, Arts and Tourism). Under the Tourism vice Director, two directorates are the Tourism destination development and Accreditation Directorate; and Tourism Marketing and promotion directorate. These are responsible to develop tourism in the city.

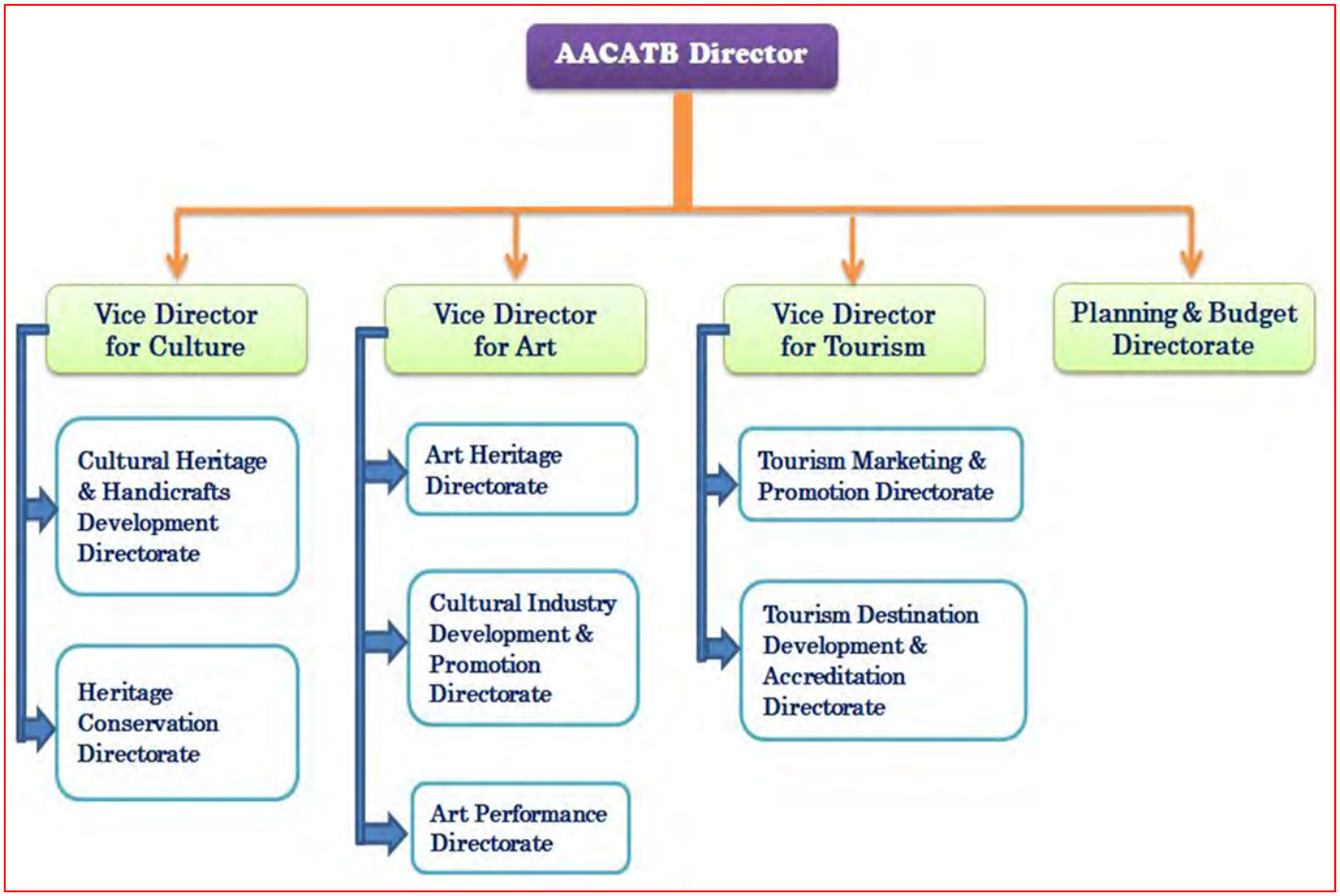


Figure 5 Addis Ababa Culture, Art & Tourism Bureau Organogram

In terms of the financial status in order to materialize the mission and vision of the bureau 100 million ETB is allocated in 2022/2023. Out of this budget 38 million is allocated for Destination development and marketing and promotion activity.

Besides, key informant from AACATB mentioned that last fiscal year 2021/22 Addis Ababa city has generated about 34.8 billion ETB as revenue from city visitors both from domestic and international visitors. This is generated through different services provided by different key players such as: entrance fees, taxes, accommodation, transport and conferences.

Table 2 Number of Addis Ababa city Visitors and Revenue Generated (2021/22)

Type of Visitors	Number	Revenue in ETB
Domestic Tourists	7,326,657	34.8 Billion ETB
International Visitors	570,000,556	

Source: AACATB

Currently, in terms of partnership, it is noted that there is no project for the bureau supported by donors or development partners. However, the bureau engages the private sector actors such as software developers e.g. WAS Branding who are supporting their work with limited budget.

Besides, respondents from the bureau has mentioned the following two cases as the key constraining that the organization is facing due to budget constraints to carry out its planned activities;

- *AACATB designed a project entitled "Project for Smart Tourism Mobile platform".[2]However, the Bureau faced a challenge of getting adequate financial support for this project.*

- *AACATB has been also implementing a project "Project for Building Museum for Nelson Mandela"[3] here in Addis Ababa. The aim of the project was to commemorate the former freedom fighter and the then president of the Republic of South Africa, who had been in Ethiopia for military training in the early days of his struggle against Apartheid regime basing a military camp in Addis Ababa. In this regards, the project landscape design and renovation work on the camp were completed through the support of Addis Ababa University. However, the main construction works to implement the project has been pending because of lack of financial support.*

3.1.3 Ethiopian Convention Bureau (ECB)

ECB is another major tourism player operating in Addis Ababa city at a federal level, which is specifically established to promote the new tourism segment that targets providing facilitation service for Meetings, Incentives, Conferences and

[2] This platform is designed by MOT to transform MICE and stop over tourism.
[3] Goal of the project is to transform the military training camp and its building into a museum for Nelson Mandela

Exhibitions (MICE)[4] tourism business in Ethiopia. This bureau is organized in three operational desks which include: MICE research and Business development desk, MICE Marketing desk and MICE Sales desk. Major activities of this Bureau are:

- Sourcing sales lead and branding Ethiopia especially Addis Ababa as best MICE destination in Africa through international MICE Tourism platforms.
- Supported through capacity building program to enhance Business tourism competitiveness in the global market.

The respondents from Ethiopia Convention Bureau have mentioned similar challenges to that of Addis Ababa Tourism Bureau and Ministry of Tourism in terms of lack of support from development partners. In addition, the global issues like the COVID-19, internal security problems including the war in the northern Ethiopia have posed the biggest challenges for tourism sector. This in turn affected the activities of convention bureau because of cancelations of many international meetings, conferences and exhibitions planned to be held in Addis Ababa.

3.2 Tourism Association and Academic institutions

The following section briefly outlines the main findings from selected association, enterprises and academic educational institutions operating in tourism sector in Addis Ababa city.

3.2.1 Tourism Associations

In Addis Ababa city there are only six tourism and hotel service related professional associations. Names of these associations include Ethiopian Tourism Professionals Association, Ethiopian Tourist Guides Professional Association, Ethiopian tour operators association, Hotel owners association, Talak Ethiopia Tour operator Association, Hotel Professionals Association. The table below outline name of the associations as well as their contacts.

[4] MICE: is an acronym that stands for meetings, incentives, conferences, and exhibitions. Recently the term has been used widely as alternative for the terms "meetings industry" and "events industry".

Table 3 Ethiopian Tourism and Hotel Professionals Associations

Name of the Associations	Name of Person in charge	Designation Position	Contact address (Mobile)
Ethiopian Tourism professional Association	Mr. Minyamir Asrat	Manager	(+251) 903296629
Ethiopian Hotel Professional Association	Mr. Kiflu G/giorgis	Manager	(+251) 91 261 0001
Ethiopian Tour Guide Professional Association	Mr. Ashenafit Kassa	Manager	(+251) 944363356
Ethiopian Tour Operation Association	Mr. Tewodros	Manager	(+251) 913335696
Talak Ethiopian Tour Operators Association	Mr. Nahom Asmasu	Manager	(+251) 911431895

In general, according to the key informants from respective associations the major services offered by the association can be summarized as follows;

- Enhancing profession and professionalism; representation and promotion of all members,
- Negotiation with Ministry of Finance on resolving issues such as importing duty free tour vehicles and others for tourism service
- Advocacy both on international and national on trending issues;
- Delivery and facilitation of training and education to improve skills of members and industry personnel;
- Provision of information about policy; support the industry on voluntary basis by making professional contributions to government and private stakeholders and medias through engagement of different workshops, meetings, etc.

Among others, respondents from the selected target associations have mentioned the following two issues as major challenges during the study;

- Shortage of finance: Due to high running cost and limited membership fee makes it difficult to execute all planned tasks and be competent with the international market.
- The new draft VAT regulation significantly affected tour operators.

Towards their future plans of the associations, participants highlighted the following core activities to perform;

- Capacity building training for service providers; involve in tourism infrastructure development; undertake lots of promotional and marketing effort to re-start the tourism business; strategic document preparation for tourism, to be strong voice of Ethiopian tourism industry; finding sources for financial strength of the associations, conducting range of research on tourism and resolving Taxation issues on tour related business etc.

3.2.2 Tourism Educational Institutions

The need for skilled labour in the hospitality and tourism industries is increasing over time and to meet this demand, there are a number of educational institutions established at different levels and capacity operating in Addis Ababa. In this regards, it is found out that there are about 3 government higher level educational institute and 6 poly technic colleges that are providing hotel and tourism training. In addition, there are about 8 higher levels privately owned educational institutions including universities and Collages/Institutes providing different level training programs and courses in degree and diploma levels for tourism and hospitability industry. The following table provides list of names all Universities, colleges, institute that offer Tourism and Hotel programs in Addis Ababa.

Name of University Collages/ Institute	
Government	**Private**
1. Addis Ababa University (AAU)	1. Admas University
1. Tourism Training Institute	2. St. Mary's University
2. Nefas Silk poly technic college	3. Damat Hotel and Business College
3. Entoto poly technic college	4. Ibex Hotel and Tourism College
4. Misrak poly technic college	5. Lion Ethiopia Tourism, Hotel & Business College
5. Lideta industrial college	6. National Aviation College
6. Tegbared poly technic college	7. L.M International Hotel and Tourism Institute
7. Winget poly technic college	

The following table presents a detail description 6 sample selected educational institutions including their location, years of establishment, number of graduate and training programs.

Table 4 Tourism Education Institutions

Name of Education Institution	Office location/addre	Year of Establishm	Number of Graduates	Training Programs		
				TVET (Leve 1- 5)	Degree	Masters
Tourism Training Institute	Mexico, Guenet Hotel,	1970	15,052	▪ Front office operation ▪ Food & Beverage Service ▪ Food & Beverage Control ▪ House keeping ▪ Food preparation ▪ Bakery and Pastry ▪ Tour Guiding ▪ Tour operation ▪ Hotel Management ▪ Tourism Management ▪ Tourism Marketing	Hotel Management	

Name of Education Institution	Office location/addre	Year of Establishm	Number of Graduates	Training Programs		
				TVET (Leve 1- 5)	Degree	Masters
Lion Ethiopia Tourism, Hotel and Business College	Arada Sub city,	2000	11,000	▪ Front office Operation ▪ Food & Beverage Service ▪ House keeping ▪ Food preparation ▪ Tour Guiding ▪ Tour operation ▪ Hotel Management		
National Aviation College	Kirkos Sub-City	2008	168	▪	Hotel Management	
Addis Ababa University (AAU)	Arada Sub-city	1920	278	▪		Tourism Dev't & Engagement
Nefas Silk Poly technic college	Lafto Sub-city		1,250	▪ Food Preparation ▪ Front Desk Supervision ▪ Housekeeping ▪ Food & Beverage Service ▪ Foreign dish cooking ▪ Bakery and Pastry ▪ Tour guide ▪ Tour Operation		
Entoto Poly technic college	Entoto		3,232	▪ Food Preparation ▪ Front Desk Supervision ▪ Housekeeping ▪ Food & Beverage Service ▪ Foreign dish cooking ▪ Bakery and Pastry ▪ Tour guide ▪ Tour Operation		

Source: Basic Study (Feb 2023)

The key informants in the private colleges and universities mentioned that various training programs offered in TVET level and degree programs in hotel and tourism fields. TVET programs offer the following courses: Hotel operation, House Keeping, Hotel Management, Food and Beverage Service Supervision, Food and Beverage Control, Pastry Bakery, Confectionary, Front Office Supervision, Tour Operation Supervision, Tour Guide and Tourism Management.

On the other hand, AAU offers both first degree and post-graduate higher level education programs (i.e. Hotel Management and Tourism Management degree program and Master's program in Tourism Development and Management).

Regarding their on-going activities, majority of the respondents replied that trainings are offered by conducting need assessments from trainees and the tourism industry. Further higher training institutions are contributing to the human resource development requirements of the tourism and hotel industry.

Specifically the key informant from Tourism Training Institute indicated that apart from the training programs the institutions is providing research and consultancy services to support the industry. Moreover, the institute is delivering capacity building trainings on short term and on job trainings.

Major Challenges: Respondents mentioned the following issues as major challenges;

- Poor attitude and concerns towards the private educational colleges and institutions by having double standards perceiving private and government institutions although the education strategy and policy set similar standards.
- Employment organizations have the attitude problems for graduates from private institutions in the hiring process.
- Lack of flexibility, up to date on the educational system documents, manuals and directives towards dynamic education requirements.
- Gap between industry demand and education system mainly the curriculum lacks revision and modification to meet the qualifications requirements of the industry.

- Lack of capacity building among experts in government office who supervise and coordinate the education institutions have lack of qualification on pedagogy and the current school practices.
- Lack of consistence training on current tourism and hotel practices; no clear standards and ambiguity of standards to assure its implementation at school level, the evaluation and licensing standards are not clearly defined in terms of quantifiable criteria;
- No sectorial research findings related to academic programs that helps to check the status of the implementation of the educational sector;
- Lack of enough support and incentives from the government for private educational investment and there is no clear map, vision, goal and share of private sector contribution in alleviating the education access and requirements of the hotel and tourism industry.

Key informants from selected target training institutions mentioned their future plan as following:

- Provide community service through awareness and training;
- Skill training for unemployment youth on food preparation, baking, pastry and related capacity trainings to help them build their entrepreneurial skills and create micro and small businesses.
- Provision of tourism trainings for local community around attraction sites in Addis Ababa; conducting need assessment and expanding the training program by specializing on hotel and tourism.

3.3 Tourism Enterprises

Available tourism enterprises operating in Addis Ababa city are established for various functions to cover in the tourism industry. In this respect, key informants in the enterprise category comprises tour operators, travel agents, car rent, domestic trip and hiking tour organizers, event organizers, souvenir shops, cultural centres and art galleries. In Addis Ababa city there are about 1,150 tour operators, which are licensed and registered by Ministry of Tourism (MOT, 2023).

The main tourism enterprises services providers such as Tour operators are responsible for;

- Organizing and arranging different tour services and packages (group and tailor made)
- Car Rental service
- Hotel reservations, airline seat bookings and ticket sales
- Coordinate trips to Ethiopia with outbound tour operators
- Arranging special tours like adventure tourism and sport tourism (i.e. running, hiking, , bicycling, mountain hiking, etc.)
- Organize authentic trips for genuine cultural and natural experience focus on upscale clients.
- Organize charter tour with helicopter trip in Ethiopia.
- Arranging domestic tourism
- Arranging out bound tours to Jerusalem, Egypt, Turkey, Dubai, China, etc.
- Translation and helping to meet birth family, and adoptive family

For the purpose of this study, based on their office location convenience, about 30 major tour operators were used as sample respondent. The table below depicts the details of each sample service providers including their office location, name of focal persons and contacts.

Table 5 List of sample Tour operators

Organization Name	Office Location (Sub city, kebele..,)	Person in charge	Designation/Title	Contact address	Staff No
Nile Ethiopia tours	Nefas silk lagto k/ ketema lubu werda 01	Seife ayalew	Markating manger	+251947232474	4
Yonas Tiku Tours	Addis Ababa, Yeka Sub City	Yonas Tiku	Owner and Manager	Addis Ababa, Yeka Sub City	4
Pleasure Ethiopia Tour and Travel	Bole Subcity, Wereda 05, (ex 24 kebele), 24 Building (near Kokeb building), 2nd floor, Office No. 14	Nahome Admassu	Manager	nahomkun@yahoo.com, info@pleasureethiopia.com, +251930014600, 251911431895	3
Zelalem Ethiopia Tours	Bole Subcity	Zelalem Tadele	Operation Manager	Zelalemtadele@gmail.com	5
AY REISEN – Tour	Addis Ababa, Kirkos, Woreda 01	Aynalem Hindeya	General Manager	Aberus Business Complex, 4th Floor, #403, Tel. +251940123758	5
Source Ethiopia Tours		Daniel Ademe	General Manager	+251 911 89 89 18	3
One Love Ethiopia Tour & Car Rent	Ghana street, Bole Atlas Abay Insurance Building 3rd floor #306 Addis Ababa Eth	Abreham yohannes	CEO	+251 91 122 3399	4
Seya Ethiopia tours	Arada sub City	Seid	G/manager	www.seyaethiopiatours.com	2
Daniel & Freye tours PLc	Bole sub City kebele 5	Daniel Tesfaye	Managing Director	+ 251 930012508	
Yama Ethiopia Tours and Travel	Kirkos Sub city, 08	Tariku Weldaregay	General Manager	tarik@yamatoursethiopia.com	10
Quest Ethiopia Tours	Yeka sub city, woreda 13	Dagimawi Mengistie	Managing Director	+251911017506	2
Jonah Ethiopia Tour and car rent	Kirkos Sub city	Yonas Ketema	Owner and Manager	+251 91 114 3223	
Stunning Ethiopia Tours PLC	Kirkos Sub City	Ermias Ketema	Owner and General Manager	Ketema_ermias@yhaoo.com	
13 Suns Tours Plc	Cameroon St. Bole Medhanialem New Bright Tower Office No. 602	Ermias Segen	General Manager	+25111 662 6071 +25191 152 8878, Fax:+25111 662 606 Addis Ababa	
Timeless Ethiopia tours	Nifas Silk Lafto Sub city, Wereda 09 Saris Addisu Seffer, HEYDAY HOTEL	Habtamu	General Manager	+251 118 889 695 +251 114 70 9089, +251 911 510 881 http://www.timelessethiopia.com/	
Simba Tours	Haile G/Selassie street, Debre Damo Hotel, Ground Floor,	Wubshet Alemayehu	General Manager	+251 11 662 29 22 +251 911 52 31 36	6
Visit Ethiopia Travel	Taos Tower, Mozambique St, Addis Ababa, P.O. Box: 140 code 1251 Addis Ababa, Eth	Bekelle Uma	Owner and Manager	+251 987 96 96 96 info@visitethiopiatravel.com	4
Pagumen Tour and Travel S.C	Haile G/ Selassie street, Comet bld., 1st floor	Eyob Mekonen	Tour operation partnership and outbound Head	+251903131313, +251116686063 info@pagumen.com	27
Image Ethiopia Tour and Travel	Namibia Street, Harmony Hotel, Bole Area.	Asrat Kahsay	General Manager	+251 911 259 300, +251 116 672 582 info@imageethiopia.com	1

Source: Basic Study (Feb, 2023)

Moreover, there are many art galleries and souvenir shops available in Addis Ababa. Among these the basic study contacted four prominent art galleries and souvenir shops (with the consultation with AACATB) including; Makush Art gallery, St George Art gallery, Ekram cultural craft centre and Watew souvenir shop. The detail contacts of each art galleries and souvenir shops are listed below.

Table 6 Souvenirs and Art galleries

Name of the organization	Office location Sub city	Person in charge	Designation Title	Contact address	Number of staff
Makush Art gallery	Kirkos sub city	Natnael yohaness	Manager	0911418602	10
St George art	Kirkos Sub city Sherato Area	Saba Alem	Manager	0941568555	7
Watew Art gallery	Kirkos, Sub city Hilton area	Komelel madegaga	Manager	0911603362	8
Ekram Traditional Cloth and Hand crafts	Lideta sub city Post office area	Ekram Tadess	Manager	0911133814	4

Source: Basic Study (Feb, 2023)

Their main tourism products includes participation in exhibition events for sales of cultural cloths, paintings, artefacts, antiquities, leather products, religious icons, wood works, and sculptures.

In addition, the study included selected sample restaurants that provide unique services for tourists in Addis Ababa. Hence for this study 3 restaurants are approached during the data collection, which include Yod Abyssinia, 2000 Habesha, Fendika cultural center. The details about the contacts of each restaurant are depicted below.

Table 7 Cultural centers and traditional restaurants

Name of the cultural restaurants	Location / Sub city	Contact address
Yod Abyssinia Cultural restaurant	Bole sub city	+251 116 61 2985 info@yodethiopia.com
2000 Habesha cultural restaurant	Bole Sub city	
Fendika cultural center	Kirkos Sub city Hilton area	+251 91 154 7577
Chechiho cultural center	Bole sub city	+251 11 66 79383

Source: Basic Study (Feb 2023)

The aforementioned cultural restaurants provides the following services; serve cultural foods and drinks, live cultural music and dance, hosting weddings and special events. Moreover, the public enterprises that were included as sample respondent were Ethiopian airlines, Ethiopian tourist trading enterprise, and Fileweha Spa service.

- The main services of Ethiopian airlines provide are domestic and international air transportation, promotion and handling holiday package.
- Ethiopian Tourist trading enterprise provides duty free shops, sale of handcrafts, traditional cloths, fine wood works, tourist guide books, paintings, post cards and participation in trade fairs in different foreign countries.

The enterprises pointed out the following challenges to carry out their planned activities;

- Issues and limits relating to tourist visas on arrival (inconsistent visa on arrival permit rights, even while the Ethiopian government permitted visa on arrival at air ports for 38 countries, travellers may not be able to use this right up on their arrival
- Unpredictable and unexpected price increases for entrance fees at various locations, which have a negative impact on tour operations and tour package costs.
- Importing duty-free tour-wheel-drive vehicles is restricted. The majority of Ethiopia's destinations can only be reached by four-wheel drive vehicles, which has an impact on how competitively the nation can market itself internationally.
- The limitations placed by Ethiopian Airlines on the ability of travel agencies to receive clients inside the terminal. This fosters inconvenience and top-notch customer service.
- Shortage of Foreign exchange hinders tour operators to participate and promote Ethiopian in international trade fairs and exhibitions.
- COVID-19 pandemic,
- Lack of skilled manpower, limited road and hotel infrastructure.
- Lack of finance, inappropriate policies and requirements by the government hinders the growth of the industry in general and the organization in particular.

- Further the security related challenges which includes recent instability in the country because of the civil war that happened for almost two years and also the unpredictable security situation in different parts of the country although it is improving step by step, but that was the challenge faced so far,

Due to the aforementioned challenges, many companies lost their major income and are now facing unprecedented financial crisis even forced to downsize their employees. AACATB reported an estimated loss of 1,124,508,400 ETB, for the month of April 2020, in tourism-related businesses in the city (AACGCATB, 2020).

If this figure is extrapolated up to the re-opening of the tourism sector on 1 October 2020, tourism-related businesses in the city might have lost around 6.6 billion ETB (Addis Ababa Arts, Culture and Tourism Bureau, 14 May 2020).

With respect to future plan of their organization interviewed enterprises mentioned the following;

- Digitalizing their marketing and promotion activities.
- Diversifying services; promoting Ethiopia and expanding business all over the world; through arranging as many travels and packages as possible;
- To be among the top sustainable tour operation companies that play its CSR in all aspects;

3.4 Development Partners

This section discussed the result from Development partners supporting the Tourism sector in Ethiopia/Addis Ababa. Information is collected from CBI Ethiopia, World Bank, European Union, GIZ, and KFW. The table below presents the detail description of each DPs project activities including the budget and project objectives both for completed and on-going projects.

Table 8 Development Partners Role in Tourism Development in Ethiopia

Development Partner	Major Activities	Project Objective	Project Budget	Project status
IFC	- Convention Bureau Established as department - Ethiopian Tourism Fund established - 15 staffs including staffs from Immigration and Ethiopian Airline visited Iceland for experience sharing in MICE tourism	Technical support for Ministry of Tourism	1.5 Million USD	On-going
Master Card Foundation	- Tourism Investment Profile (Document produced) - Digital promotion platform for Mot created Formulated - 15 staffs employed	Technical support for MOT	2 Million USD	1st Phase has been Completed and there is extension
UNDP	- Office 365 introduced in Mot	Capacity Building (technology Transfer)	2 Million Euro	Completed
ESTDP	- Lalibela, Addis Ababa, Axum as tourist destinations benefited from the matching grant	Tourism Destination Development	300 Million ETB	Completed
CBI	- Tourism Marketing Strategy document Produced by MOT - 25 Tour operators participated in tour operation marketing plan and Digital promotion trainings and awarded with International Certificate - 1st round training delivered for regional tourism staff in destination development	Technical Support for destination development and Marketing	1.5 Million Euro	It is 3 year project – it has 1 more year for Completion
PHE(Population Health Environment) and **HRF** (Hailemariam and Roman Foundation)	- 13 Rooms Community Lodge & with its facility constructed at Senkelle Sanctuary at Arsi - HRF donated 1Million ETB to furnish the lodge	Infrastructure Development	10 Million ETB	Completed
KFW	- Hawasa and Bahirdar TVET colleges Collected 300 Thousands Euro Respectively - KFW working to Make TTI(CTTI) and Bishoftu TVET College Center of excellence	Tourism investment to create excellence in tourism Training Centers	8 Million Euro	On-going

3.4.1 CBI

The Centre for the Promotion of Imports from developing countries (CBI) i.e. a department of the Netherlands Enterprise Agency. CBI's export program aims to support the Ethiopian tourism sector to grasp these opportunities for further growth on European markets. At the same time, the program aims to support building a sound foundation for future sustainable and durable growth. This development partner is working with Ministry of Tourism on the following area of interests:

- Tourism Destination Management Information System (strategic document preparation for Ethiopian tourist destinations).
- Providing specialized training on sustainable tourism development, management for selected tour operators, tourism professionals, potentially tourism players based in Addis Ababa city
- Certifying an Award for those who attending of Travel life International.
- Providing training and coaching on online marketing and export marketing of the best standard for potential European leisure market,
- Facilitating opportunities for tourism enterprises to join for international trade fair and events.

The program pays special attentions for the following area of interests in Ethiopian tourism sector: Sustainability, Product diversification, Destination marketing, Destination management and Community engagement.

3.4.2 UNDP

UNDP as development partner have been working with the ex-Culture Tourism Ministry under the project: Strengthening Institutional Capacity for Sustainable Tourism Development. This project had the following project outcomes:

- Policy regulatory and institutional capacities strengthen.
- Destination and product development enhancements,
- Ethiopian tourism sector effectively branded and promoted,
- inclusive and sustainable private sector tourism strengthened,
- Strong partnership and strong engagement in places were the main activities.

Currently, UNDP is working with Addis Ababa city to maintain sustainability of Addis Ababa tourism project activities;

- Beautifying Sheger river sides which was stretches from Mount Entoto to the downstream of the river which covers 56 Km.
- Hire consultants for the river side projects to maintain its designed standards
- Works on environmental affairs of the city and supports the city projects that run about sustainable tourism development.

3.4.3 European Union (EU)

European Union is playing an important role in supporting the cultural development as main product of tourism sector. EU has newly signed project with Ministry of Tourism to develop cultural tourism resources of Addis Ababa and other Ethiopian regional cities for 5 years with 11 million ETB.

3.4.4 Master Card Foundation

Master card foundation is a development partner working with Ministry of Tourism and carrying out the following activities:

- Providing support for small and medium tourism players for job creations in Addis Ababa and outside Addis Ababa,
- Provided post Covid-19 recovery financial support for small and medium enterprise covered for 4-5 months' salary for their employees and support for their operating expenses and also provided low interest loan 5%.
- Provided financial support for 45 tour guides, with an amount of from 10,000 ETB to 20,000 ETB to sustain their normal life.

3.4.5 World Bank

WB has one on-going project to support Ministry of Tourism. This main goal of this project partnership was to meet;

- To make resource assessment (resource mapping),
- Prepare tourism development and investment plan based on assessed resources.
- To provide capacity building training for tourism industry players.

Upon on-set of Covid-19 pandemic outbreak and the prevailing war situation in the various parts of Ethiopia this project has been pending. Recently it is noted that there is an on-going discussion between higher officials among the MoF, MoT and World Bank team to commence the project. The detailed activities of this grand project were, Asset mapping, tourism strategic document preparation and training for the industry players.

World Bank also is playing its pivotal role in supporting Ethiopian tourism through IFS tourism funds for stop over tourism development and MICE tourism development and marketing.

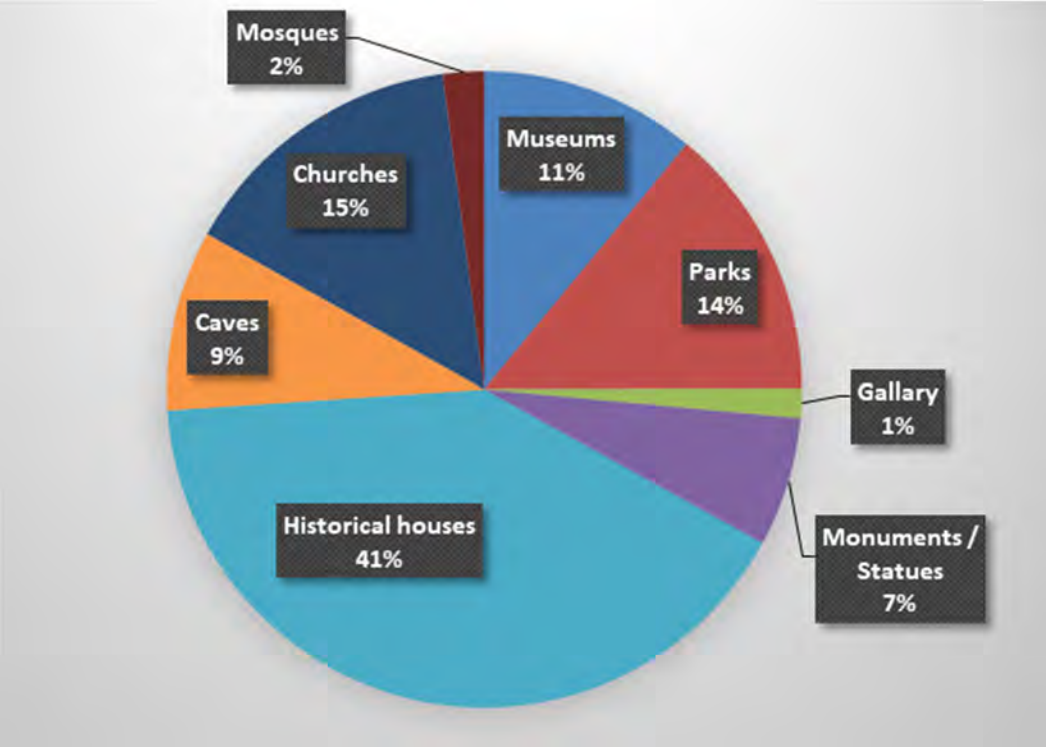
Then after gap has seen to continue its planned actions, due to the restructuring of the ministry, the donors came with a question about who is going to be the project owner in the new structure and abut the structure of the new office. Then it has been hold for the last one and half year without support with the restructuring process.

The new ministry of tourism has established, Convention bureau as the core tourism department at executive hierarchy level and the full structure has been released. So it is supposed to continue its support, as the release of the bureau structure was their final question to continue their support.

3.5 Tourism sites in Addis Ababa

Tourism attractions sites in Addis Ababa are about interesting historical and cultural places in the city. It also includes religious and other important attractions in Addis Ababa. It covers top places of visits, and famous tourist sites in Addis Ababa. The tourist sites described above are found in Addis Ababa, in different direction of the city. With consultation with Addis Ababa city administration culture and tourism bureau the consultant has visited about 33 selected tourism sites in Addis Ababa. In this regards, the consultant has included major tourist that are highly visited in Addis Ababa city by tourists.

Figure 6 Proportion of Tourist Destinations in Addis Ababa



Source: Basic Study (Feb 2023)

The following section briefly outlines the generic and specific description of major tourism sites visited during the study:-

Museums: This category of tourism sites are dominant and are frequently visited by tourists. During the observation for this study the following common problems were observed; poor lighting, display layout problem, in adequate caption for self-guide tourists. Narrow space to display their collection is observed in Entoto, St Marry museum, Addis Ababa Museum and Bilalu Al Habesh museum.

The ethnographic museum is relatively well organized and has proper caption, with multi lingual guiding services and its staff also got training with sign languages for tourists with hearing impairment. In terms of opening hours, most of them work for 7 days in a week from Monday to Sunday from 8:30AM- 5:30 PM and closed on public holidays. Exceptionally National Museum is closed on Tuesday for cleaning and conservation and it is opened on holydays.

Type of activity carry out include sightseeing, photography walking in the compound, viewing around are common for most of the museum, in fact Addis Ababa and Entoto St Marry Museum prohibit taking photos which are parts of memories.

National Museum has students and discussion corners; also Ethnographic museum has corners for researchers. Entrance fees wise, museums owned and operated by Churches and private charges relatively high entrance fees than the public, National museum is the cheapest of all. From conservation perspective, most of the museums need maintenance and renewal both the interior and displaying areas; Holy trinity cathedral is under renovation.

Monuments and Statues: These are also important tourist sites of Addis Ababa with their memorial, scientific and Aesthetic values. Tourists frequently visit these sites to know the historical importance and to make a photo as these are land marks of the city. Some of the monuments have no enough descriptions and caption for walk-in tourists, there is no proper entry and exit points from the main roads. In fact, Tgilachin monument and Emperor Menelik II Statue have relatively beautiful garden, some others are dirty, unpleasant surrounding and lack spaces for group of tourists.

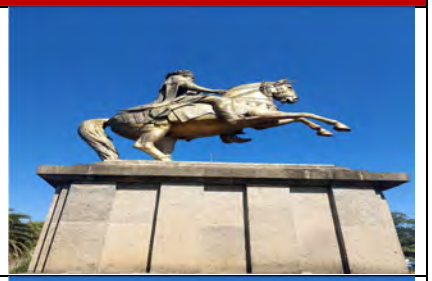
The common issues of these monuments and statues are unattended and lack close supervision for further development evidenced with fallen fences and dirty surroundings.

Table 9 List of Tourism Sites

No	Sites's Name	Locations	Working HRS	Entrance fees	Number of staff Contact	Site descrption	Pictures
1.	St Mary Church Museum	Gullele sub city On top of Mt Entoto	8: 00Am to 5:00 PM	300 ETB for foreigners 50 ETB locals 10 ETB students	7 staff Tebebu D. Museum director 0911637003	It is famous and popular church's Museum with rich iconic collections of historical and religious items depicting Ethiopian history.	
2.	Entoto Park	Gullele sub city On top of Mt Entoto	06:00 AM To 6:00 PM	Entrance fee is free		The park embraces a range recreational facilities for people of all ages with its diverse indoor and outoor facilities, including an art gallery, sporting facilities, resort, restaurants and coffee shops, trails and biking routes, walk ways, horse riding facilities, and camping ground.	
3.	Emperor Menelik II Palace Entoto	Gullele sub city On top of Mt Entoto	8: 00Am to 5:00 PM	300 ETB for foreigners 50 ETB locals 10 ETB students	7 staff Tebebu Dgnew Museum director 0911637003	The palace was constructed by Emperor Menelik II before 1305years, is one of the leading tourist attractions in Addis Ababa. The palace has been housing Emperor Menelik and His wife before the establishment of Addis.	
4.	Ethnographic Museum/IES	Gullele sub city 6 kilo	8: 00Am to 5:00 PM From Monday – Friday 9:00 Am- 5:00 pm Saturday – Sunday	200 ETB for foreigners 20 ETB locals 10 ETB students	73 staff Director: Dr. Takele M. 0911791334	This is a popular heritage attraction housing displays of Ethiopian culture and history. The museum features collections of ethno-musicological items, philatelic and coin collections, traditional medicine and burial customs as well as paintings related to Ethiopia's religious heritage.	

No	Sites's Name	Locations	Working HRS	Entrance fees	Number of staff Contact	Site descrption	Pictures
5.	National Museum	Arada Sub city	9: 00Am to 5:00 PM Tuesday – Sunday except Monday including Holidays	50 ETB for foreigners 10 ETB locals	11 staff Director : Mr Demrew 0913069362	The museum is exhibiting archaeological, collections, ceremonial costumes, and art and Ethnographic objects. Currently, the museum has four permanent exhibition sections.	
6.	St George Cathedral Museum	Arada Sub city Piasa	Monday to Sunday 2:30AM to 5:00 PM	100 ETB for foreigners 10: ETB for locals		The Museum contains ecclesiastical objects. The ceiling has leakage and needs repair. The abundant collection church artifacts need large space.	
7.	Addis Ababa Museum	Mesquel square,Kirkos Sub city	8: 00Am to 5:00 PM	50 for foreigners and 10 locals	17 Seyoum Temesgen Education officers 0911026255	The Museum is a cultural and historical museum... It holds a collection of artifacts and photographs documenting the history, politics, economy and society of Addis Ababa. The museum is home to a range of exhibits including photographs, weapons, flags and other memorabilia relating to Ethiopia's long history	
8.	Holy Trinity Cathedral	Arada sub city Arat Kilo	8:30 AM -5:30 from Monday to Sunday except holidays	300 ETB for foreigners 20 ETB for locals	4 staff Dereje S. The tour operation director 09117623905	It is one of the most magnificent churches in Addis Ababa. Its large dome and slender pinnacles are one of the landmarks of the city. A good-looking crystal chandelier, notable paintings, murals, & beautiful stained-glass windows adorn its interior.	

No	Sites's Name	Locations	Working HRS	Entrance fees	Number of staff Contact	Site descrption	Pictures
9.	**Unity park**	Arada sub city Arat Kilo	8:30 AM -5:30 from Monday to Sunday including holidays	300 ETB for foreigners 20 ETB for locals	Ashenafi T. Tour operation director 0913740338	It is one of the recently inaugurated modern city parks. The park premise is within the Grand palace of Emperor Menelik II (1889-1913). The palace has been serving as the residence of Ethiopia leaders since the last decade of the 19th century. The Unity Park, once a highly secured Palace premise, is now open to the public.	
10.	**Friendship square**	Arada sub city Filwuha	8:30 AM -5:30 from Monday to Sunday including holidays	20 USD ETB for foreigners 300 ETB for locals	Ashenafi T. Tour operation director 0913740338	It is Built in the downtown of Addis Ababa and situated along the eastern bank of the Bantyketu River, a tributary of the Kebena River, on the ridge sloping down on the western side of the Menilek II Palace, forms part of the 58 kilometers long Entoto-Akaki Riverside beautification project.	
11.	**Yekatit 12 Monument**	Gullele Sidist kilo	Open every time.	entrance fees free	Public square	It is a monument to commemorate the mass killings of Ethiopians by Italians in 1937 during Italian occupation. Every year, people of Ethiopia commemorate this day to this day on (February 19).	
12.	**Lion of Judah statue**	Kirkos Lgahar	Open every time.	entrance fees free	Public square	The monument commemorates the victory of the Jews over their enemies and is a key symbol of Ethiopian monarchy. After being looted by Italians in 1935 and taken to Rome, Zerai Deres fought back with a scimitar when confronted by police, shouting "Lion of Judah is avenged.	

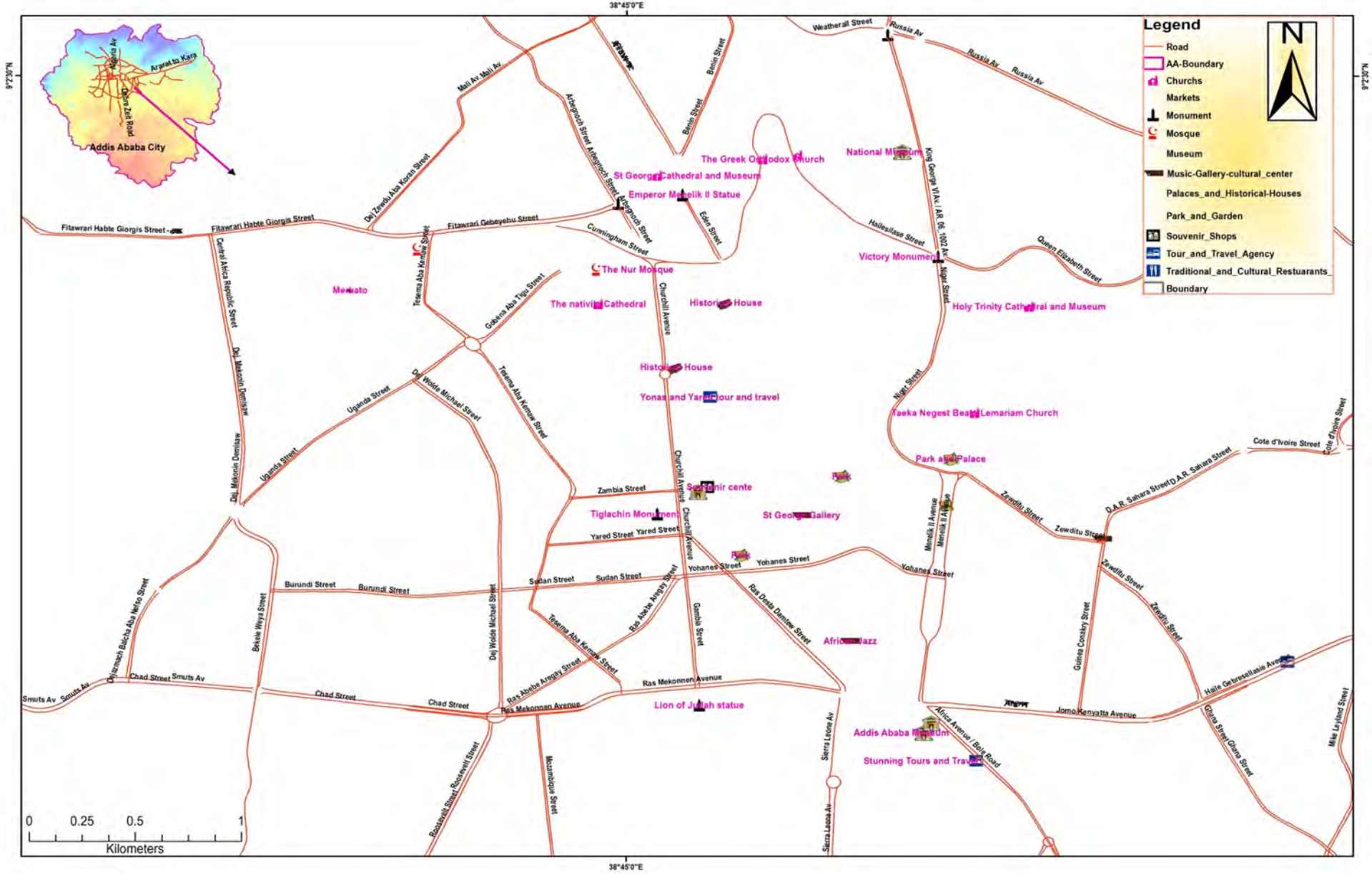
No	Sites's Name	Locations	Working HRS	Entrance fees	Number of staff Contact	Site descrption	Pictures
13.	Emperor Menelik II Statue	Arada Sub city Piassa	Open for everyone, every time	No entrance fees	Public square	The statue is the main land mark of the city and its workmanship is unique. It has beautiful garden, while viewing the inside part. The statue was built to commemorate the great achievement of Emperor Menelik II defeat of Italy at the battle of ADWA.	
14.	Abune Petros statue	Arada Sub city Piassa	Open for every one and every time.	No entrance fees	Public square	It is located in better place with beautiful garden and has Amharic interpretation inscribed at the base of the monument. It is open for sightseeing and photography. This statue communicates the monks struggle against Italian invaders.	
15.	Tiglachin Monument	Lideta Sub city Black lion	Open every time	There is no entrance fees	Public garden	The site communicates the unique historical support of Cuban government to Ethiopia to struggle and defeat against the invading Somali forces. The site has spacious beautiful garden where tourists can enjoy sightseeing, photography and viewpoints.	
16.	Victory Monument	Arada Sub city	Open every time.	There is no entrance fees	Public square	This is a victory monument built to commemorate the victory of Ethiopian against Italian 2nd invention in 1941. The monument has a lot of inscription narrating about the patriots who were struggling fighting against colonizers.	
17.	Red Terror Memorial Museum	Cherkos Mekel square	Open from Monday to Sunday 8:30 AM -5:00 PM	100 ETB for foreigner		This is dedicated to the victims of Mengistu Haile Mariam's Derg regime (tribute to those who lost their lives during the Red Terror purges between 1977-78.	

No	Sites's Name	Locations	Working HRS	Entrance fees	Number of staff Contact	Site descrption	Pictures
18.	**Shiro Meda cultural clothes Market.**	Gullele Shiro meda	The market is open from 8:30 AM to about 8:00 Pm	There are free entrance fees for everyone.	Public market places	Shiro meda cultural clothes market is a place where traditional vestments and items for both foreign tourists and locals. Tourists frequently visit this site either to buy Ethiopian clothes or to visit the market and locals interaction.	
19.	**Bilallu Al Habesha Museum**	Kirkos Sub city Sarbet area	Open from Monday-Sunday from 8:30- 5:30 pm	---- ETB for foreigners and ----for locals	------- staff Museum director	The museum recently opened museum mainly to exhibit the Islamic history of Ethiopians and the holy items which exhibit the religious vestments, icons, books and other treasures for tourists and researchers.	
20.	**Mercato Open Market**	Addis Ketema Sub city Mercato	Open from about 9:00 Am – about 4: Pm except Sunday.	There is no entrance fee	It is a public market place owned by the general public.	Mercato is known being the largest open market in Africa. Where sellers and buyers gathered from different corners of the country with their unique products. This is a special place for tourists to experience the authentic culture of Ethiopian in their real life. The spice, the handicraft, the cultural clothes, the basket and the second hand items sections are more famous for tourists.	
21.	**Ethiopian postal museum**	Lideta Sub city Post office area	Open from Monday-Sunday 8:30-5:30	30 ETB Locals 100 ETB, foreigner	3 staff museum director 0920 484672	The museum is a special type of museum which exhibits items, stamps, photos and ways of communications in ancient Ethiopia. Moreover it depicted the role of message and communication contribution for the developmental history of Ethiopia.	
22.	**Ambassador park**	Kirkos sub city	Open from 7:00 AM -8:30 pm every day	10 ETB		The park is a beautiful garden where many of locals preferred for meeting and wedding. The park has been recently renewed with marinating its natural beauty.	
23	**African park**	Kirkos Sub	Open for every	100 ETB	Public park	The park is located along Emperor Menelik	

No	Sites's Name	Locations	Working HRS	Entrance fees	Number of staff Contact	Site descrption	Pictures
.		city Hilton Area	day from 7:00 Am 6:00 pm		operated under private owner	avenue in front of Hilton Hotel. The park is unique distinguished with old plants were planted by symbolic and prominent African leaders. By now this park is important site for outdoor activity especially for children.	
24.	**Lagahr train station**	Kirkos Sub city Lagahr	Opened with special request	There is no entrance fees	Encircled by the Eagle Hill real estate company	This is the site which has historical and old trains aged from the Emperial time. Some of them were the royal trains, especially Emperor Haile his Majesty used to travel with. The station and its facilities are also historical which lasted more than 120 years.	
25.	**Wahsha Michael church**	Yeka sub city	Open From Monday to Sunday from 9AM-5 PM	There is no entrance fees , it is voluntary support	The church administrators are responsible for its management.	The Washa Mikael Church is an orthodox church located in Ethiopia. It is a famous example of rock-hewn architecture, and is estimated to date back to the 12th century.	
26.	**Lions park**	Gullele Sidist Kilo	Open every day from 8:30-5:30	20 ETB for locals		In this park, graceful caged lions devouring large chunks of meat and where visitors can take pictures standing beside them. This small but captivating park is located a center of sidist kilo.	
27.	**Gulele Botanic Garden**	Gullele Sub city	Open every day from 8:30-5:30	150 ETB foreigner 50 locals	5 staff Museum director 09 20959878 Dereje	It is a natural garden covered with diverse tree species with walking and jogging routes. The garden is a good place for tourists who love adventure, enjoy walking in a calm natural environment & stay away from a busy city life.	
28.	**Be'ata Mariam Museum**	Arat Kilo Sub city Palace area	Open every day from 8:30-5:30	300 ETB for foreigners and 20 for locals		Ta'eka Nagast Be'ata Mariam Church, a church built erected by Queen Zewditu in 1911, is located close to the Grand Palace. It is a gray, four sided & two story building known as Menelik's Mausoleum. The underground crypt consists of the graves of Emperor Menelik, Empress Taytu, Queen Zawditu, Princess Tsehay & Abuna Matewos, the Egyptian Patriarch.	

No	Sites's Name	Locations	Working HRS	Entrance fees	Number of staff Contact	Site descrption	Pictures
29.	Loin of Judah of Emperor Haileslassie	Lideta sub city	Open every time	There is no Entrance fees	Public square No permanently employed staff	The monument commemorates the victory of Jesus over their enemies & is a key symbol of Ethiopian monarchy carrying a cross & a throne. This monument was built by special order of His majesty Emperor H/Silassie to show achievements & the association of Lion of Judah with Power.	
30.	Zoma museum	Lideta Sub city Mekanisa Abo Area	Every day from 8:30 – 5:30	150 ETB Adults 25 kids locals	0941246180	This is the amusement museum, built by private initiative mainly to create additional recreational opportunity for the tourist in natural settings. The museum is unique maintain the natural eco –friendly manner while it is mad made in nature.	
31	Addis Ababa War Cemetery	Arada sub city Arat Kilo	8:30 AM -5:30 from Monday to Sunday except holidays	300 ETB for foreigners 20 ETB for locals	4 staff Dereje S. The tour operation director 09117623905	Addis Ababa War Cemetery is in front of the General Wingate School. Addis Ababa War Cemetery is interesting place to see graves of famous Ethiopians like: • Dr. Kebede Mikael –Ethiopian writer • Dr. Negasso Gidada – Ethiopia's first president • Simeon Adefris - Patriot during the Italian Occupation of Ethiopia Colonel John C. Robinson is also buried at Addis Ababa War Cemetery. Col John helped Ethiopia fighting the Fascist Italians during the occupation. He trained Ethiopian pilots and helped in setting the Ethiopian Air Force up. One can see graves of numerous Italian and British soldiers from the second Italo-Ethiopian War (1936 – 1941).	
32	Science museum in Addis Ababa	Arada sub city Arat Kilo	8:30 AM -5:30 from Monday to Sunday except holidays			The science museum was designed and built entirely by MadaTech's exhibition crew. The new museum is 250 square foot & shows 30 exhibits that demonstrate many diverse scientific subjects.	

Figure 7 Major Tourism Attraction Sites in Addis Ababa (See Annex 4 for Location Coordinates of each Site)



3.6 Tourism Activities in Addis Ababa

There are various potentials of developing nature and culture based activities avail based on tourists' specialized interests. The existing and potential tourists' activities in Addis Ababa are.

Table 10 List of Tourism Activities in Addis Ababa

Tourism Activity	Local Context in Addis Ababa
1. **Sightseeing**	Sightseeing is most frequently practiced activity in Addis Ababa. Palaces, museums, monuments, Churches and memorial statues, are the common sites for this tourists' activity in the city.
2. **Outdoor Camping**	Camping is practiced in Addis Ababa by foreign and domestic tourists at places of Entoto Park, Gullel botanic, Yeka Mountain, Wochecha Mountain.
3. **Folk dancing**	This is the act of travelling to and participating folk dance and cultural performances as pastime event. Tourists participate in the folk dancing to get pleasure and experience excellent culture of Ethiopian. Folk dancing is common at Fendika cultural center, Checheho Cultural restaurant, Totot cultural restaurant, Habesha 2000 cultural restaurants, and Yod Abyssinia restaurants are some to mention.
4. **Tourist Telescope viewing**	Telescope viewing is act of watching scenic lookouts, city, tourist attractions, landmarks, waterfalls and events of tourist's interest with the help of machine. This activity gives tourists to get a comprehensive experience of Addis Ababa, Mount Entoto Natural Park, Yeka Mountain, Wochecha and Erer Mountain.
5. **Photography Tour**	It is an act of travelling to tourist sites mainly to make professional photos of an attraction site, landmarks, Museums, Parks, Monuments, Palaces, Markets, public gathering places, religious & public festivals & to places that periodically celebrate events, historic buildings, monuments for pastime activity or for commercial purposes. Photography tour is common at Shiro Meda and Mercacto markets places,
6. **Traditional food cooking**	This is the activity of participating in the traditional food cooking process and testing. This cooking may include the identification of the ingredients and spices used to cook the traditional foods. The main sites for these activities are located in the traditional restaurant and cooking centers.
7. **Zip lining activity**	It is outdoor recreational soft adventures, full of exciting and challenging activities. Zip lining is the act of moving from tree to tree using a robe, wood plate, or vehicle tire. The zip line adventure has health and psychological benefits in avoiding stress and improving the self-achievement, as a result this is the adventure activity. Currently, zip lining practiced by many tourists in Entoto Natural Park.
8. **Bird watching**	Bird watching is the act of viewing birds in their natural habitats, taking photos. This activity is common in Addis Ababa frequently carried by resident tourists and locals as pastime avifauna. The important Bird areas of the city are: Aba Samuel water reservoir Areas, and Ghion Hotel, Entoto Mariam church, Holy Trinity Cathedral, Kechen Medahanealem church, Entoto Park, Yeka mountain, Wochecha Mountain ,

Tourism Activity	Local Context in Addis Ababa
	Bihertsige Park. Some of the unique birds found in Addis Ababa. ▪ Dusky Turtle-Dove Hadada ▪ Spot breasted lapwing, ▪ Wattled Ibis ▪ Hooded Vulture Love birds ▪ Thick-billed Raven ▪ Abyssinian Thrush ▪ Red-eyed Dove ▪ African paradise fly catcher
9. Horse Riding	The horse riding activity is an outdoor activity of riding horse for enjoyment and adventure sport, this activity has a long year's history in Ethiopia. Foreign residents, foreign and domestic tourists carry out this activity. It is takes place in Entoto Natural Park, Janmeda, Sululta plain area, Summit area.
10. The paint ball Arena	The paintball adventure is an outdoor entertainment soft adventure. It is an act of shooting sport to the target point, so, visitors can entertain playing Paintball., This activity is taken place in Entoto Natural Park.
11. Hiking	The duration of the activity varies between short half-day programs and longer. The important hiking areas are: Entoto Mountain, Yeka Mountain, Wochecha Mountain, Erer Mountain, Entoto Park.
12. Concert and live Music	In Addis Ababa city live concerts and Music festivals are held regularly - Eve of Ethiopian new year in Exhibition Centre, Millennium hall, Sheraton Hotel - Eve of Ethiopian charismas in Exhibition Center, Grove Garden , Ghion Hotel.
13. Film making	This is a tourist activity that takes place in Addis Ababa by tourists, either for professional film production of Ethiopia
14. Cable car riding	This is a single activity takes place in Entoto Park. Most of Ethiopian young are practicing this activity as their outdoor recreation.
15. Pottery making	This activity is common in Addis Ababa in Kechene surroundings.. Tourists go there mainly to take part in the pottery making process, to experience the life style of people who lead their life in these activities.
16. Cycling	These is the activity commonly takes place in Addis Ababa city by domestic tourists and some foreigners, particularly, some of the city parts plot a lane for cycling encouraged this activity to be fostered . This recently upcoming tourism activity of Ethiopia practiced by tourists as part of adventure activity along the mountains part of Addis Ababa, particularly Entoto Mountains chains.
17. Ballooning	One of the interesting things which Ethiopia preferred over other destination is its amazing landscape. Ballooning is therefore, one means of practice to be witness to observe this beauty. This adventure activity is takes place from top of Mountains to the lowland parts. Entoto, Eyer, Kality, Hayat Sululta, Sebta, Menagesha has a great potential to develop activity based ballooning tourists' activity.

Tourism Activity	Local Context in Addis Ababa
18. Pedal cart riding	This is an activity exclusively takes place in Entoto Park, provided by Kuriftu. Most of the time group of young weekenders or vacationers, couples takes this activity to maximize their enjoyment and adventure experience.
19. Archery arrow shutting	This is the activity of tourists to point and shooting the target, mostly practiced by group of tourists to determine their accuracy of targeting goals and practicing again and again until meet the objective. This activity is also common in Entoto Park operated by Kurift.
20. Attending sport activities	There are various types of sport activities that can be taken as tourism attraction.In Addis Ababa there are many foreign and domestic tourists who actively either participate or attend these activities, some of the activities are running including the actual and training Marathon tournaments, traditional sport festivals takes place in Janmeda Annually.
21. Cultural cuisine cooking	Ethiopia has distinctive cuisine and also perhaps the spiciest means it tends to appeal many tourists with a taste for curries and other species dishes. Addis Ababa is the cultural center of the country provides opportunities for cooking activities. Tourists participate in cooking cuisines, to follow all procedures, sharing of cooking culture, to experience the distinctive taste of Ethiopia dishes. Cooking activity is organized by tour operators in collaboration individual cooking centre in Coffee is an important word in Ethiopia with its socialization and economic contribution. Ethiopia being home of Coffee Arabica has a great potential for tourists to experience traditional ceremony, modern coffee processing. Tourist spend their spare time in participating the coffee ceremony held in coffee house of the city, tourist also take part in the modern coffee processing of, Separation, roasting, coffee making & tasting advance arrangements. 
22. Coffee Testing	Attending coffee ceremony is takes place in the cultural restaurants and coffee houses, Coffee roasting, making and tasting is takes place in Robera coffee house, Hadro coffee house TOMOCA coffee and Mamo Cacha are some to mention.
23. Familiarization Trip	This is the activity of visiting tourist sites and attraction by foreign based or domestically based companies to familiarized their staff with tourism activities and sites of Addis Ababa. This activity is mainly carried out by tour companies and tourism related business owners to get acquainted about the on-going tourism activities, products, facilities and services as a base for their future business operation. Addis Ababa is the starting and ending point of familiarization trip carried out in Ethiopia.
24. Thermal and SPA activity	Addis Ababa has a great potential for wellness and spa based activities. Thermal tourism activities are undertaken to maintain their, beauty, health and wellness. Filwuhas and various hot spring areas are great potential for thermal tourism related activities. By now, Sheraton hotel, Filwuha SPA Enterprise, Ghion Hotel and the Jubilee Palace are typical places for these activities.

Tourism Activity	Local Context in Addis Ababa
25. Nightlife	Nightlife starts at around 11:00 p.m. and continues throughout the night being very interesting and vibrant. To rock on to an Ethiopian traditional entertainment, there are several cultural restaurant halls where there is a live show of Ethiopian music, dance and very favoured entertainment. There are also several dynamic high-class nightclubs with great vibes, wider space for sitting, dancing and also separate smoking area. As the city host's variety of people, these nightclubs also offer best service hosting several kinds of alcohol drinks, soda and bottled waters. For the relaxing, these places have a dedicated security, balanced AC and down-to-earth to fulfil any needs from you. The entertainment also varies from live bands, acoustics & DJs playing local and international hits on schedule throughout the week.
26. Festivals	Colorful festivals are takes place in Addis Ababa for religious, ritual, parade and entertainment purposes. Epiphany, Meskel, Irrecha ,Shadey, Ashenda and Ashendye are some to mention. Both foreign and domestic tourists attend these colourful festivals. During these festivals, tourists take part in taking photograph, make a walk with the crowd, run and a pared, singing, dancing and share the feeling of the locals with the festivals.

Table 11 Major Festivals in Addis Ababa

No	Name of the festival	When activities takes place	Where takes place
1	Ethiopian Epiphany	Epiphany is celebrated on every January 18 the eve of the fest and January 19 is the main festival day. 	Celebrated mainly in Janmeda, and other communal churches gathering spaces of the city.
2	Meskel (The True Cross Finding)	Meskel (The True Cross Finding) festival is celebrated on every September 26 the eve and September 27 is the main festival day. 	This festival is held mainly in Meskel Square
3	Irrecha	Irecha is celebrated every Saturday after the celebration of Meskel festival.	It is celebrated in Hora Finfinee
4	Great Run of Ethiopia	Great Run of Ethiopia is celebrated every November 10.	This sport festival is held in the city running track with its beginning & ending at Meskel square.

3.7 Tourism Products in Addis Ababa

Tourism products are a combination of tangible goods and services demanded by a tourist during their spare time to stay at a particular tourist destination. These products include cultural, natural and manmade attractions and facilities such as accommodation, transportation and ancillary services. The term 'product' is something of a misnomer since leisure and tourism are service industries and the bulk of leisure and tourism activity is concerned with the customer's experience. In essence a tourism product can be defined as a visitor service, activity, attraction or an experience (in itself, a collection of services, activities and attractions).

In this process, tourists derive unique experience, from broader perspective, the sum total of experiences derived by the tourists during the entire trip can be considered as the product.

Tourism products are combination of objects, attractions, transportation, accommodation and entertainment where each elements of combined together by tour companies to be sold as a single product (UNWTO, 2015). The tourism product is not a destination, but it is the experience of that place and what happens there.

Hence the tourism products of Addis Ababa city is the composite of, attractions, transportation service, accommodation, entertainment, tour and travel services, facilities that satisfy tourists demand during their stay in the city. The extent, type and quality of tourism development of a city are determined by the types of tourism products available in the destination and the ability of these products to meet the overall experience of tourists in the destination.

To this effect, nature oriented products, which are mainly derived from the natural beauty of the city; the beautiful mountains, endemic and semi endemic birds, the scenic drive from the mountain, warm and sunny weather. Manmade tourism products, which depict the culture of the people, civilization and are related to history, it reflects the activities, beliefs and life of people of any particular region, more over it provides some amusements, thrills or enjoyable feel to the tourists.

Table 12 List of Tourism Products

Tourism products	List of products	Specific Locations of Activities
1. Nature based tourism products	• Beautiful mountains	- Entoto, Wochecha and Yeka, Furi and Yere
	• Endemic & semi endemic birds • Dusky Turtle-Dove Hadada &Wattled Ibis · • Hooded Vulture Love birds • Thick-billed Raven · Abyssinian Thrush • Red-eyed Dove African paradise fly catcher	- .Along the river sides from Entoto –Aba Samuel reservoir - Ghion garden - churches compound of Addis Ababa, palace areas - Mountains of Addis Ababa - Gullele garden - Unity park
	• Sunny and warm weather	All parts of Addis Ababa
	• Hot spring waters	- The filwuha areas
	• Indigenous pants and botanic garden	- Gullele Botanic garden - Ghion garden
2. Man-made tourism products	• Museums in Addis Ababa	- National museum - Ethnographic museum - Addis Ababa Museum - Entoto St Marry Museum - Holy trinity museum - Bilalu Al Habesh musem - Zoma Museum
	• Palaces found in Addis Ababa	- Entoto Emperor Menelik Palace - Genet Lule Palace
	• Monuments and statues found in Addis Ababa	- Victory monument - Tiglachen Monument - Marty monuments - Yekatit 12 memorial monument - Emperor Menelik II statue - Abune Petros Statue - The lion of Judah statue
	• Churches found in Addis Ababa	- Holy trinity cathedral - Wahsa Michael church
	• Parks found in Addis Ababa	- Unity park - Entoto park - Gullele botanic garden
	• Art galleries found in Addis Ababa	- St George Art Gallery - Makush Art Gallery - Watew Art gallery
	• Entertainment, night life and folk dances	- Fendika cultural center - 2000 Habesha cultural center - Yod Abyssinia cultural house

Tourism products	List of products	Specific Locations of Activities
	• Fairs and festivals	- Meskel Religious festivals - Epiphany religious festivals - Great run marathon event - Irecha Ritual - Live music and concerts
	• Market and hand craft centers	- Shiro meda cultural cloths - Mercato open Market - Post office souvenirs & handcrafts shop - Ensira pottery center
3. Activity based tourism products	• Activities	- Outdoor camping Telescope viewing - Cycling Zip lining - Sight seeing Hiking - Photography Mountain biking - Film making Birds watching

3.8 Attractiveness of Addis Ababa as Tourist Destination

Addis Ababa is referred to as the political capital of Africa due to its historical, diplomatic, and political significance for the continent, is opening new tourist destinations such Jubilee Palace, Nelson Mandela Training camp. The tourism players who were interviewed indicated that including the city's newly developed tourism products specially the newly introduced Entoto parks, Unity and Friendship parks are giving the hope and insight for all actors in the industry.

Keeping all these in mind, Addis Ababa is an attractive stopover destination. In addition to the sites and tourism products of the city, the handicrafts, souvenirs, and tourist products centres can make it an ideal stop over city for transit tourists. The city has many attraction sites which attract tourists with different interests.

Alternative activities based products including handicrafts and cultural cuisine preparation, coffee centres (both cultural coffee ceremony and modern coffee processing) can enhance variety of tourist products and attractive the city more various tourists. Availability of attractive tourist sites, entertaining tourist activities, satisfactory tourist products and memorable handicraft items combined with welcoming culture makes Addis Ababa one of the top tourist attractive cities. The appealing nature of the city and availability all components of tourists' supplies

will maximize benefits of tourism for the city in increasing duration of stay and increase expenditures.

Addis Ababa has got a new brand name "The Vibrant Hub of Africa", it's a melting pot for tourists, and the rationality of this brand is that Addis Ababa is the 4th diplomatic city of the world. Majority of respondent pointed out that Addis Ababa is a city from where tourist makes feel at home due to the hospitality of the people. On the contrary, some respondents indicated that the city is not utilizing its potential comparing with global conference centres. Generally, the sum total of the aforementioned discussion stated that Addis Ababa is an attractive city with its unique culture.

3.8.1 Tourism Potential and Opportunities

For the next three or four years in the tourism development of Addis Ababa upright significantly the potential, opportunities will be the following three new projects;

- **New pilot River side project**: "The New pilot River side project initiated by Ethiopian Prime Minister Abiy Ahmed (PhD); "convert river banks of the city into public parks and green spaces. The project is implemented on 50 hectares of land with 2.5 billion birr allocated budget, to be completed by 2024. Succeeding suit will be the grand project covering a distance of 56 kilometers (Embassy of Ethiopia in Brussels, 2019).

- **La Gare real estate development**: The government of Ethiopia, in partnership with Eagle Hills (Project consolidates) building a La Gare real estate complex that will serves as a new commercial hub for the city and dynamic downtown of Addis Ababa (Addis Ababa city municipality, 2019).

- **Adwa Zero Km Museum Projects**: Adwa zero kilometer Museum project is underway in a historic place at the heart of Addis Ababa, pissa. This place where the project is underway is considered as the center of the City as well as the Country. This is also a project where Ethiopians commemorate the victory of Ethiopian forefathers at the battle of Adwa against Mussolini's Italy which waged unjust war on Ethiopia. Besides, the victory of Adwa is the source of pride for Ethiopians and black people around the globe in general. Therefore, Adwa Zero kilometer project is where Ethiopians will celebrate the victory of their forefathers and pass it to posterity as a sign of strength, valor and Independence. The project site is located at Pissa across the Mayor's office of Addis Ababa and right next to the statute of Emperor Menilik the second.

- **Two General Hospital Building Project:** The general Hospital Building project works began on February 18, 2013. The hospitals to be built in Nifas Silk Lafto and Kolfe Keranio sub-cities each costs over 548 million birr. The construction of the general hospitals is expected to be completed in a year and a half time. As the hospitals provide referral services, they would provide services to communities from the western, south western and eastern parts of Oromia. The Deputy Mayor said that the hospitals would play a key role in solving the problem of access to hospital services and providing quality health services. She witnessed the recently built centers have provided the expected services to the locals.

3.8.2 Model city tour for Addis Ababa

The basic study result indicated that, the existing city tour has a various problems, which was practiced for short duration and it didn't incorporated the newly built sites.

- **Comments on the City Tour Programs by Tourism players:** Respondents explained that there are still gap in establishing professional city tour programs. It is also mentioned most of the tour operators plan a city tour in traditional way, repetitive and short duration of visit for one day or half a day tour program. The city tours programs are mainly include the common and well known attractions such as churches, museums and markets. On the other hand, majority of the tour operators include in the city tour programs the newly opened attractions and extend the duration of visit for two day tour.

On the other hand, the preference of tourist is changing from passive attendant to active participatory and deep experience of locals, handicraft production process, household activities and to experiencing the overall life style of local communities.

- **Recommendations to improve the city tours and the model city tour:** The majority of key informants stated that city tour programs can be extended from two to five/seven days as the city has varieties of sites including cultural, natural, historical, festivals and events supported with activity based tourism that include running, walking through the streets, hiking and camping in the mountains and other potential activities that can extend tourist stay.

Considering the aforementioned gaps identified the following model city tour program is developed.

Day 1: Addis Ababa city tour: Entoto St Mariam church, Entoto Park and shiromeda traditional Clothes Market, woven traditional clothes site and Cultural centre.

Day 2: National Museum, Holy Trinity, Mercato Open Market, Art gallery or souvenir shop visit and Cultural Restaurant.

Day 3: Ethnological museum, The Zoological Natural History Museum, Sheger Park and One Cultural handicraft production centre.

Day 4: Addis Ababa museum, Martyr Museum, St George Cathedral and visit Artisan centre and Night African Jazz club.

Day 5: Bilalu Al Habesh Museum, Zoma Museum, and Ghion Area Bird watching and Thermal water and SPA services from Filwuha Area.

A special city tour can be designed that target Turkish, Armenian, Arab, Koreans, Indians Italians and Israel tourists as there are different historical connections and relics in Addis Ababa. Thes potential tourists have the interest to visit religious sites, architectural reflections in buildings, markets, handicrafts, particular settlements that were footprints of their ancestors who lived in Addis Ababa in different historical development of Addis Ababa.

Moreover, the tour organizers identified a special interest city tour programs that can be designed focusing visit of monuments/statues in Addis Ababa that are landmarks and memorial of specific event specially most of them were related with "Freedom" and "Victory". In addition the respondents stated that it is important to promote in the city tours of Addis Ababa focusing its uniqueness as conference and meeting city, transit tourists, visit to high mountains and peaks, various ethnic people culture and lifestyle, markets and historical parts. For example a specific city tour can be designed for View Point and trekking Tour where tourists View Addis Ababa from Yerer, Wechecha, Furi, and Yeka mountains.

A specific city tour can be designed focusing tours of walking in the old parts of the city, experiencing Ethiopian food taste, cooking and folk music, old historical buildings, and coffee processing and tasting tours.

4. Conclusions and Recommendations

4.1 Conclusions

The Addis Ababa Culture, Art and Tourism Bureau and Ministry of Tourism are major government players in the tourism sector, aiming to promote Ethiopia as the greatest MICE destination in Africa. It faces financial challenges, lack of financial resources, limited standards, market competition, less promotion of resources, out-dated policy and proclamation, limited attention to stakeholders, and non-professionalism.

Addis Ababa is a major tourist destination with Museums, natural parks, cultural and modern contemporary Night life houses, and access to UNESCO registered tourist attractions, but lacks infrastructure and urban tourism potential.

The Associations' future plan focuses on capacity building and training, infrastructure development, promotional and marketing, strategic document preparation, financial strength, research, and resolving regulatory and industry issues. However, it faces major issues such as lack of finance, high overhead cost of operation, and the new draft VAT regulation.

The enterprises face a variety of challenges to carry out their planned activities, including the Corona Virus pandemic, global rise in printing inputs, inflation, lack of skilled manpower, limited road and hotel infrastructure, lack of finance, and lack of proper government policies and incentives. To address these issues, enterprises plan to digitalize and diversify services, expand the business and create more employment opportunity, be among the top sustainable tour operation companies, play a role in, undertake various promotion platforms and awareness for re-starting the tourism business, develop new tourism products, aggressively work on domestic tourism and incentive travel, and view Addis Ababa as an attractive destination with a variety of tourism sites, activities and products.

CBI Ethiopia provides specialized training on sustainable tourism development, online marketing and export marketing, and facilitates opportunities for international trade fairs and events. It also focuses on sustainability, product diversification, destination marketing, and community engagement.

UNDP is working to maintain sustainability of Addis Ababa tourism activities by beautifying Sheger river sides and hiring consultants. It also works on environmental affairs and supports city tourism projects.

EU European Union is playing an important role in supporting the cultural development as main product of tourism sector.

Master card provides job creation, post-crisis financial support, and low interest loan for tour operators. The Ethiopian Development Bank is a key partner in the development of Addis Ababa's tourism industry, providing loans to service providers. Word Bank provides support to Ministry of Tourism to make resource assessments, prepare tourism development, and secure investments as a result of the Covid 19 pandemic and war.

KFW has set aside 8 million euros for a three-year project to support Ethiopia's tourism industry, focusing on investments in hospitality, service, and hotel management education.

Museums, parks, palaces, monuments, and statues are the main category of tourism sites in Addis Ababa, with poor lighting, display layout, signage, and adequate caption for self-guide tourists.

Addis Ababa's monuments and statues are popular tourist destinations, but their interpretation is inconsistent and subpar.

Tourists in Addis Ababa engage in a variety of tourism-related activities, such as sightseeing, folk dancing, photography, horseback riding, guided tours, hiking, outdoor camping, telescope viewing, and bird watching. Recently developed tourism activities include zip lining, pedal cart rides, cable car rides, archery arrow

shooting, and paintball arenas. Tourism products are a collection of material goods and services that tourists need to stay at a specific tourist destination. Tourists gain unique experiences during this process, and the total of the experiences gained by the tourists throughout the entire trip can be considered a tourism product. Most of Addis Ababa tourism products are classified as Nature oriented products reflect the natural beauty of the city, while manmade tourism products depict the culture and history of the city.

Addis Ababa is a city with a lot of opportunities for tourism development due to as a seat to the African Union, embassies and consulates, Bole International Airport, diversified mosaic culture, natural beauty, and government attention. It is also the office place for most Ethiopian tour operator companies, luxury and star rated hotels, restaurants and convention centres, and the centre for tourism training and educations. The sunny and warm weather, traditional and cultural centres, art galleries, and relatively educated and service oriented manpower are also valuable assets.

Addis Ababa is facing several challenges, such as conservation and development problems, poor maintenance and management skills, low budget and financial allocation, absence of development partner, soft infrastructure, inadequate hotel rooms and conference halls, weak product development activity, destination development poor marketing and promotional platforms, poor interpretation and inconsistent information provision, poor and unstable leadership, frequent restructuring of government organizations, mismatch between training and education establishments, duty free importation of vehicles, Cameras, logistics, safety problems, security and wars.

4.2 Recommendations

Government tourism organizations need adequate budget and support to ensure destination development, marketing and promotion, heritage conservation, and product development.

The government should carry out tourist resource mapping, develop new tourism products, develop Addis Ababa as a competitive tourism destination, do accreditation and regulation professionally, solve shortage of financial resources, involve in marketing and promotion of the city both domestic and international tourists aggressively, and address out-dated policy and proclamation, limited attention to stakeholders, and non-professionalism practice by the different tourism players. Additionally, conservation work for cultural and natural resources should be given management attention, and poor Hard and soft infrastructure and less emphasis to urban tourism orientation should be addressed.

Addis Ababa should focus on capacity building programs, uniformity in standards and quality serving tourists, appointing educated and merit based professionals, providing awareness and training programs, creating a working, inviting and state-of-the art system, facilitating loans to tourism business owners, promoting tourism, encouraging local community participation, managing visa issues, improving security, creating tourist database and statistics, renovating historical houses, developing new sites, activities, and opening visitor information centres.
The respondents recommended that the government solve visa issues, resolve regulatory difficulties, develop incentives for re-starting tourism, advertise the city for domestic visitors, and regulate prices to encourage and promote tourism.

The support and partnership of the development partner for the proper utilization of Addis Ababa tourism potentials are indispensable. The support of development partners is highly recommended to encourage and enhancement the engagement of tourism players in creative crafts work development projects so as to create jobs for many Addis Ababa dwellers.

New tourism product development is also an important segment which demand the active participation of development partners so as to diversify and make Addis Ababa more attractive city for many tourists, leads income job opportunity and income generation. Destination development, sustainable utilization of tourism resources of the city is unattainable by the city Administration so, the active participation of development partners is indispensable.

Destination marketing and digitalized promotion is the other sector that needs the support of the development partners to divert the bad image and cast the good image that the city as conference centre of the world.

The tourism sites such as museums, palaces, monuments and statues should get timely, maintenance, conservation and proper utilization for their intended objects. Potential tourism sites needs to be developed and new tourism products should be developed utilize the enormous potentials and meet ever emerging tourists demand.

- The Addis Ababa Culture, Arts and Tourism Bureau should carry out tourist resource mapping, develop new tourism products, undertake regular conservation work for the tourism sites and monuments, solve shortage of financial resources, implement marketing and promotion of the city both domestic and international tourists, and revise out-dated policy and proclamation, and give proper attention to stakeholders.

- The MICE and domestic tourism should get priority and developed as competitive advantage for Addis Ababa.

- Addis Ababa tourism players should focus on capacity building, uniformity in standards, appointing professionals, providing awareness and training, facilitating loans and incentives, promoting tourism, encouraging local community participation, improving security, creating tourist database and statistics, renovating historical houses, developing new sites and activities, infrastructural development, and opening visitor information centers.

- The key players should give focus to the tourism sites in fulfilling tourist facilities and services.

- The government should simplify visa and customs procedures for attracting an increased number of tourists and tourists' expenditure.
- The Ministry of Tourism should create conducive operation for tour operators by revising the VAT regulations.
- Tourism key players should offer incentives to help enterprises recover through long-term loans, reduced interest rates, and financial grants.
- The tourism enterprises should plan well organized city tour programs and include various potential sites, activities and products to promote, diversify and extend the tourist stay in Addis Ababa.
- The concerned body in the education sector should set clear and consistent licensing and evaluation standards, provide proper support and consider the contributions of the private colleges and universities.
- The development partners shall intervene in tourism product development to diversify and make Addis Ababa more attractive for tourists, create job opportunities and income generation.

5. References

Addis Ababa City Government, (2017). Addis Ababa city map. (http://www.addisababa.gov.et.Addis Ababa city municipality, 2019).

European Council on Tourism and Trade (ECTT, 2019)

Growth and Transformation Plan II (GTP II) (2015/16-2019/20) Federal Democratic Republic of Ethiopia Volume I: Main Text

Hussen T (2021) An Overview of Current Ethiopian Tourism, Journal of Tourism & Hospitality Review, Vol.10 Iss.5

Kidane-Mariam, T. (2015). Ethiopia: opportunities and challenges of tourism development in the Addis Ababa-upper Rift Valley corridor. Journal of Tourism and Hospitality, 4(4).

Ministry of Culture and Tourism (2009).Ethiopian Tourism Development Policy. Addis Ababa, Ethiopia

Ministry of Culture and Tourism. (2015). http://www.moct.gov.et/index.php/en

Reporter,(February,2019).Addis pilots river side park project. https://www.thereporterethiopia.com/article/addis-pilots-riverside-parkproject

Sustainable Tourism Master Plan (2015-2025) Federal Democratic Republic of Ethiopia

Trip Advisor (2018) Monuments and Statues in Addis Ababa. https://www.tripadvisor.com.

UNWTO. (2017). Sustainable Development of Tourism: http://sdt.unwto.org/ en/content/about-us-5

Walle, Y. M. (2010). Tourist flows and its Determinants in Ethiopia (No. 001).

World Bank (2006) Ethiopia: In Makeda's Footsteps: Towards a Strategy of Pro-Poor Tourism Development.

World Bank, (2012). Ethiopia"s Tourism Sector: Strategic Paths to Competitiveness and Job Creation

World Travel & Tourism Council, (2019).

Yechale Mehiret Practices and Challenges of Domestic Tourism Development in Ethiopian Tourism and Hospitality Industry (2019), Ethiopian journal of business management and economics Volume 2, No. 2

Yabibal, (2010). About Tourism development in Ethiopia

6. Annexes

Annex 1: Addis Ababa Culture, Arts and Tourism Bureau Registered Heritages sites

I. Ancient Monasteries and Churches				
Ancient Monasteries and Churches found in Gullele Sub city				
No.	**Name of the Heritage**	**Location**		
1	Entoto St Marry Church	Entoto		
2	Entoto St Ragueal Church	Entoto		
3	Kidest Kidane Mihret Church	Entoto		
4	St Rafael Church	Paulos area		
5	Kechen Medahnealem Church	Kechene area		
6	St Kusquam Church	Entoto		
7	St Markos church	6 kilo, AAU		
8	Genet Eyesus Church	Genete Eyesus area		
Ancient Monasteries and Churches found in Nifas Silk Lafto Sub City				
9	Mekane Hiwot Abune Gebre Menfes Qedus	Mekanisa Abo area		
10	Debre Nazareth St Yosefe Church	Saris area		
11	St Hana Church	Hana Mariam area		
Ancient Monasteries and Churches found in Kolfe Keraniyo Sub City				
12	Keraniyo Medahnealem	Kolfe Keraniyo area		
Ancient Monasteries and Churches found in Kirkos Sub City				
12	St Estifanos Church	Meskel Square		
13	St Urael Church	Urael area		
14	Mekane Semaetat Kirkos Church	Cherkos area		
Ancient Monasteries and Churches found in Arada Sub City				
15	St George Cathedral	Piassa		
16	Holy Trinity Cathedral	4 kilo area		
17	St Beata LeMariam Church	Near to grand palace		
18	St Gabriel Church	Near to grand palace		
19	St Kidane Mihret Church	Piassa		
20	Menbere Patriaric St Marry Church	5 Kilo		
21	St BaleWold Church	4 kilo		
22	Greek Orthodox Church	Piassa		
23	Armenian Orthodox Church	Seba Dereja area		
24	Kebena Kidane Mihret Catholic Church	Kebena		
25	Debre Negodeguade St Yohannes Church	Ras Desta Hospital area		
Ancient Monasteries and Churches found in Addis Ketema Sub City				
26	Debre Gelila St Amanuel Church	Amanual hospital area		

Ancient Monasteries and Churches found in Lideta Sub City				
27	Mahdre Sibhat Lideta Mariam	Lideta		
28	Catholic Cathedral	Leghar		
29	Debre Amen Tekilehaimanot	Teklehaymanot		

II. Mosques found in Addis Ababa		
No.	Name of Mosque	Location
1	Nur Mosque	Piassa
2	Wole Mohammed Mosque	
3	Anwar Mosque	Merkato
4	Bayush Mosque	Shiromeda

III. Historical Houses

No	Name of Heritage	Address			Location	Current Purpose/service	Administered by
		Sub City	Wereda	House No.			
1	Ras Abebe Aregay House	Gulele	1	-	Kuwesquam	St Peter Specialized Hospital	Government
2	Empress Menen/Etege Menen Foster care Home	--	4	814	Ketchene	Foster Home	Government
3	Asfa Wessen Residence	--	2	-	Sidest Kilo	University(FBE)	Government
4	Amsale Genet	-	2	-	Sidest Kilo	AAU Law Liberary	Government
5	Petros Bejian ጴጥሮስ	Arada	10		Piassa	Commercial	Government
6	Hakim Werkneh	--	10	-	Doro Manekia	Office	Private
7	Nersis Nalbadian	--	7	209/1	Arat Kilo	-	Government
8	British Bible Society	--	10	-	Piassa	Commercial	Government
9	National Museum	---		-	Amist Kilo	Museum	Government
10	Beyadeglene Hotel	-	10	-	Piassa	Restaurant	Government
11	Kuraz Printing House	---	7	-	Arat Kilo	Commercial	Government
12	Mohammed Ali	--	1	-	Arada post office area	Posta office	Government
13	Teshome Berehe	---	6	53	Arat Kilo	Kinder Garten	Government
14	Ras Mulgeta Yigezu	--	6	57	Arat Kilo	Residence and office	Government
15	David Garbedian	--	10	-	Piassa	Commercial	Private
16	Enderias Kavadias	--	9	-	Seba Dereja	---	Government
17	Bitweded W/Tsadik Goshu	Nifas silk	1	-	Lebu	Residence	Government
18	Seyoum Akaleweld	Lideta	7	-	Teklehayman ot area	School	Government
19	Tegebred	---	8	-	Mexico	TVET College	Government
20	Grazmach Sahle Mariam	Kirkos	8	417	Kazanchis	Residence and Commerce	Government/p rivate
21	Sedestegna Police station	---	8	-	Kazanchis	Police Station	Governemnt
22	E.C.A/ Africa Economic Commission	--	8	-	Menelik Square	International Conference Hall	UN
23	National Palace /Gubille/	---	7	-	Filwha	Palace	Government
24	Legaba Tasew	---	7	962/963	Sheraton Hotel	St. George Art Gallery	Private

25	Fitawerari Amede Abera	Yeka	1	239	frensay /kusmeda area	Residence	Government
26	Leul Asrate Kassa	---	1	-	Mikael Betekirstian	Security Bureau	Government
27	Debre /Birhane Meskel	---	1	199	Frensay	Residence	Government
28	Baldras Receration	---	7	-	Baldras	Commerce	Private
29	Ras Mesfin Seleshi	Addis Ketema	5	-	Pasteur	Medicine Fund Supply Agency	Government
30	Dejazmac Betweded W/Gebriel Basha	---	7	-	Autobus Tera	School	Government
31	Mehail Gebeya Hall/Adarash Number 1	---	8	-	Merkato	Commercial	Government
32	Mehail Gebeya Hall/Adarash Number 2	---	8	-	Merkato	Commercial	Government
33	Gojeb Hotel	---	7	77	Gojjam Berenda	Hotel	Government
34	Daniel Hostel	---	7	1	Autobus Tera	Hotel	Government
35	Addis Ketema Preparatory School	---	7	880	Autobus Tera	School	Government
36	Kagenew Shaleka Hotel	---	8	571	Merkato Arategna	Hotel	Government
37	General Wingate TVET College	---	10	991/1	Wingate	school	Government
38	Akaki Court House	Akaki		-	Akaki area	Court House	Government
39	Akaki Post Office	---	3	-	Akaki	Post office	Government
40	Nelson Mandella Military Training	Kolfe	10	-	Fetno Derash Training campus	Police Camp	Government
41	Betweded Endalkachew Mekonen	---	3	-	Repi Medhanalem	No service	Government
42	Alert Hospital	---	2	-	Zenebework	Hospital	Government
43	Leilet/princess Atsede Asfaw	Bole	6		Bole area	Residence	Private
44	Dejazamach Ayele	Kirkos	1	-	Kirkos area	No service	Government
45	Ye Mickel BIru Residence	Gulele	3	-	Gullele area	Residence	Government
46	Ras Abebe Number 1 & Dejazmach Girmachew Tekele Hawariat	Yeka	6	388	Beller area	Residence	Private
47	The First Greek Church	Arada	1	-	Piassa	Kafia restaurant	Government
48	Kegne Azmach Tesfa Gebre Selassie	Arada	7	-	Amist Kilo	Printing House	Private
49	Akaki Yemengist /government School	Akaki	1	551	Akaki area	school	Government
50	Ras Hotel	Kirkos	7	-	National Theatre	Hotel	Government
51	Defense Minister/Mekelakia Minister	Kirkos	7	-	National Theatre	office	Government
52	Commercial Bank(Golden Building)	Lideta	7	-	National Theatre	0ffice	Government
53	Addis Ababa Library	Arada	6	650	Sidest Kilo	library	Government
54	Hakim Werkneh Residence	Arada	1	-	Chirchil Street	Commerce	Government
55	Brgadier/ Markos W/Mariam	Kirkos	7	317	Leghar	Residence and Commerce	Private
56	Addis Ababa Muncipality	Arada	1	-	Piassa	Muncipality	Government

57	Dejazmach Alula Bekele	Kirkos	8	26	Kazanchis	Residence	Government
58	Lij Areya Abebde	---	8	18	---	---	Government
59	Abebe Reta	---	8	15	---	Office(Ministry Of Agriculture)	Government
60	Ras Emiru Haileselasssie	---	8	765/U	---	Residence	Government
61	Leul Asrate Kassa	---	8	768	---	office	Government
62	Abbay yedgo	---	8	11	---	Residence	Government
63	Professor Asrat Weldeyes	---	7	454	Leghar	--	Private
64	Negadras Gizaw Taytu Betul	Arada	1	469	Piassa	Hotel	Church
65	Akeber Ali kemerudin	Arada	1	868/872	Piassa	Commerce and Residence	Government/private
66	Immigration	lideta	7	-	Immigration	Office	Government
67	National Theatre	Lideta	7	-	Beharawi	Theatre House	Government
68	Hager Fiker	Arada	10	-	Piassa	---	Government
69	Agafari Kelele	Arada	6	-	Amist Kilo	Residence	Government/ private
70	Leilt/princess Tenage Work	Lideta	9	-	Tena Tebeka Minister	Office	Government
71	Armenian Residence	Arada	1	168/161 /146 /172/	Mahmud musika	Commercial	Government
72	Genet Hotel	Kirkos	-	-	Genet	Hotel	Government
73	World Laurate Meter Artist Afework Tekele Residence	Kolfe	9	-	Tor Hailoch	Museum	Government
74	Teyet Bet	Arada	8	-	Parlama akababi	Camp	Government
75	Balambaras W/Semayat	Arada	6	-	5 kilo	Commercial	Government
76	Trans Ethiopia 1	Kirkos	7	453	Leghar	Commercial	Government
77	Trans Ethiopia 2	---	7	455	Leghar	Commercial	Government
78	Habesha Restaurant	---	7	456	Leghar	Commercial	Government
79	Yerodolfo valori Residence	--	7	457	Leghar	---	Government
80	Sunrise Restaurant	Kirkos	7	458	Leghar	--	Government
81	Ye Babylon Ginb	Kirkos	8	250-254	Kazanchis	--	Government

IV. Monuments and Statues

No.	Name	Location
1	Emeperor Menelik II Statue	Piassa
2	Sebastopol Monument	Tewodros Square
3	Yekatit 12 Martyr's monument	Sidest kilo
4	Victory Monument	Arat Kilo
5	Abune Petros Monumnet	Piassa
6	Emeror Haile Selassie I Jublee Memomorial Monument	National Theatre
7	Lion of Judah statue	Leghar
8	Ras Mekonen monument	Seba Dereja
9	Ethio- Korea Veterans memorial monument	Afencho ber
10	Tiglachen monument	Near Black lion hospital

V. Public Parks		
No.	Name	Location
1	Lion Zoo park	Sidest Kilo
2	Africa Park	Infront of Hilton hotel
3	Behere Tsege park	Adey Ababa area
4	Peacock Park	Bole – Atlas area
5	Korea veterans memorial park	Afencho ber
6	Ethio- Cuba friendship park	Near balck lion hospital
7	Sheger Park	Addisu Gebeya
8	Gedame eyesus park	Addis Ketema
9	Kentiba Welde Tsadek park	Jemo
10	Gullele botanical garden	Gullele
11	Unity Park	Grand palace
12	Entoto Park	Entoto
13	Friendship park	Fileweha

VI. Caves		
No.	Name	Location
1	Washa Medhanealem	Medhnaealem church
2	Salew Giyorgis	Kaliti
3	Emishaw washa	Near Kara Selassie church
4	Washa Mikael	Yeka mountain
5	Atse Dawit Washa	Entoto Raguel church

VII. Museums		
1	Entoto St. Mary Museum	Entoto mountain
2	Ethnography Museum	AAU, 6 kilo campus
3	National Museum	5 Kilo
4	Addis Ababa Museum	Meskel Square
5	Zoological Natural History Museum	AAU, 4 Kilo campus
6	St. George Cathedral Museum	Piassa, St. George Church
7	Holy Trinity Cathedral Museum	Trinity cathedral compound
8	Bilal Al Habesh Community Museum	Sar Bet, Vatican embassy
9	Postal Museum	Post office
10	Bata Mariam Museum	Grand palace
11	Science Museum	In front of grand palace

VIII. Addis Ababa Public Institution				
No.	Name of Heritabge/Historical House/	Previous Wereda	Old Kebele	New Kebele Administration
Gulele Sub city Public Houses				
1	Etege Menen School	11	17	
2	Genete Leul Palace/ 6 Kilo University Campus	11	17	
3	Teferi Mekonen School	11	17	
4	Medhanealem School	8	10	
5	Health Institute	8	10	
6	Ras desta Hospital			
7	Sheik Hojele plalace	8	10	
8	Azage Terefe w/Gebriel	1	4	
9	Entoto Emperor Menelik II Palace			
Kirkos Sub city Public Institution				
10	Custom	21	1	
11	Finfine Restaurant	14	15	
12	Ethiopian Railway	21	12	
13	Ras Birru W/Gebriel			
14	Eliias Hotel	2	12	
15	Emperor Menelik Prison / Ethiopia Tikdem Campus	1	5	
16	Seitan Bet	2	15	
17	Empress Taytu Hotel	2	12	
18	Abyssinia Bank	2	15	
19	Sanford School	13	9	
20	Mereh Tibeb Printing Press	1	4	
21	Arada Post Office	2	11	
22	Negadras H/Giorgis W/Mikel/ The Old Muncipality House	2	9	
23	Africa Andnet School	2	11	
24	Cinema Ethiopia	2	12	
25	Betesayda Hospital/Yekatit Hospital	13	9	
26	Menelik School	13	9	
27	Parliament Building	14	13	
Yeka Sub City Public Institution				
28	Menelik II Hospital			
Gulele Sub City Public Institution				
29	Ye Nregus Mickel Gebir Bet			

Annex 2: Semi Structured Interview Guidelines and Checklists for Tourism Players In Addis Ababa

Profile of the institution

	Name of Organization	Office Location	Designation	Contact address

1. How the organizational chart is looks like? (apply only for government institution)
2. How much Budget is allocated for the organization(apply only for government institution?
3. What is/are the organization main on-going activities and projects (including the relevant funders or development partners)
4. What is/are the issues the organization face to carry out its planned activities?
5. What is/are the organizations future plan?
6. How do you explain the attractiveness of Addis Ababa in terms of tourism sites, activities and products?
7. What is your evaluation of the city tour programs offered by tour organizers; and do you recommend for its improvements including model city tour for Addis Ababa?
8. What is your evaluation of the hard and soft infrastructure system of the tourism resources and its challenges in Addis Ababa?
9. What is you evaluation of the tourism player's challenges, issues and obstacles in developing and promoting tourism in Addis Ababa?
10. How do you evaluate the weakness and assets of the tourism players?
11. What is your opinion about the needs of tourism development in Addis Ababa?
12. What are your opinions on the current tourism situation and tourism business in Addis Ababa?
13. What is your suggestions to improve the tourism sector in Addis Ababa?

	Name of Organization	Office Location	Designation	Contact address

1. What are the major tourist activities of the site?
2. What is the basic information of the site (site description, opening hour, entrance fee, availability of services, etc.?)
3. Do you have any recommendations for improvement tourism sites in AA?
4. Do you have any recommendation for model city tour program for Addis Ababa?
5. What is your opinion about the needs of tourism development in the site?

6. What are your suggestions to improve the tourism sites in Addis Ababa ?

Tourist Site assessment check list					
Criteria for Overall assessment of the site	**Excellent**	**Very Good**	**Good**	**Bad**	**Very Bad**
Safety and security in and around the site					
Friendliness of the local people					
Availability of food, drinks, snacks, coffee and mobile food units					
Accessibility to the sites					
Interpretation of the sites is easy to find and engage					
Availability of campsites and facilities					
Diversity of activities					
Equipment /materials/resources for activities					
Information centers					
The site is part of existing excursions and city tours					
Availability of multi- lingual guiding service in the site					
Availability facilities for children, disabilities, and special needs)					
Shopping opportunities					
Internet access					
Health services					
Convenience and access to local transport					
Well maintained and orientation signage					
Travel organizers(tour operators, travel agents, tour guides, cooks, and related service providers) are					
Part of tour packages					
Availability of viewpoints, walking paths, trekking routes, toilet, rest stop, parking and related facilities					
Unique feature of the site is well protected, maintained and conserved					
The content of attractions fits with visitor needs and is of high quality					
The core stories of the sites have been identified for interpretation by an expert.					

Annex 3: List of Persons and Organizations Contacted for Survey and KII

	Name	Designation	Organization	Contact Address
I. Government Institution				
1	Ato Sileshi Girma	State Minister	Ministry of Tourism	
2	Ato Musa Kedir	Destination Development Director	Ministry of Tourism	+251 913 854522
3	Ato Buzualem Getu	Acting Director of Ethiopia convention Bureau	Ministry of Tourism	+251935052343
4	Ato Mohammed Habib	International Tourism Marketing Senior Expert	Ministry of Tourism	+251 91 725 279
5	Ato Amedemariam Mamo	Destination development director	Addis Ababa Culture, Arts and Tourism Bureau	+251 91169 3014
6	Ato Teklu Tekelemariam	Tourism Marketing and Promotion Director	Addis Ababa Culture, Arts and Tourism Bureau	+251 911 71 59 13
7	Ato Daniel Worku	Conservation Business Director	Ethiopian Wild life Conservation Authority	+251 911 08 39 40
8	Ato Kebenesa	Customer service sales Agent	Ethiopian Airlines	+251 910 83 45 86
9	Ato Price Assefa	Manager	Fileweha SPA Service Enterprise	+251 911 62 9629
II. Development Partner				
1	Ato Tewodros Derbew	Strategic Unit Coordinator	Master Card Foundation	+251 91 396 5175
2	Ms. Jennie	Coordinator	KFW	+251 944 33 70 17
3	Ato Daniel Ademe	Coordinator	CBI Ethiopia	+251 911 89 89 18
4	Ato Gebeyaw Dilenesa	Program Officer	African Wild Life Foundation	+251 9 27 67 69 20
III. Associations				
1	Ato Tewodros Habtamu	Acting Manager	Ethiopian Tour Operators Association	+251 115 50 84 44
2	Ato Nahom Admassu	President	Talak Ethiopia Tour operators Association	+251 9 11 43 18 95
3	Ato Minyamir Asrat	Secretary	Ethiopian Tourism Professionals Association	+251 903 29 66 29
4	Ato Ashenafi Kassa	President	Ethiopian Tour Guides Professional Association	+251 944 36 33 56
6	Ato Kiflu Gebre Giyorgis	Vice President	Ethiopian Hotel professionals Association	+251 912 61 0001
IV. Academic Establishments				
1	Ato Yitaseb Seyoum	Vice Director	Tourism Training Institute	+251 92 240 4612
2	Ato Abreham	Department Head	Nefas Silk Lafto Poly Technic College	+251 93 370 3749
3	Ato Esmael Kedir	Department Head	Entoto Poly Technic College	+251 93 370 3749

	Name	Designation	Organization	Contact Address
4	Dr. Sintayehu Aynalem	Tourism Lecturer	Addis Ababa University	+251 920 34 27 25
5	Ato Zerihun Mekonen	Dean	Lion Ethiopia Tourism, Hotel and Business College	+251 946 79 74 46
6	Prof. Gebeyehu	Dean	National Aviation College	+251 946 51 16 27
V. Tourist Sites				
1	Ato Demelew Amsalu	Director	National Museum	+251 913069362
2	Kesis seyouman Tibebu	Museum Director	Entoto St Mary Church and Museum	+251 911637003
3	Teka Feyisa	Educational Officer	Institute of Ethiopian studies	+251 98 708 1153
4	Ato Seyoum Temesgen	Educational Officer	Addis Ababa Museum	+251 911791334
5	Ato Ashenafi Tafesse	Tour Operation and Marketing Manager	Unity Park	+251 913 74 03 38

VI. Private Enterprises

No.	Name	Designation	Organization	Contact Address
1	Nahom Admasu	General manager	Pleasure Ethiopia tour	+251 913761645
2	Bekele Uma	CEO	Visit Ethiopia Travel	+251911529096
3	Habtamu Mamamo	General Manager	Timeless Ethiopia Tours	+251 911510881
4	Eyob Mekonen	Tour operation and Partnership Manager	Pagumen Ethiopia Tour and Travel S.C	+251911146050
5	Fasil Abebe	Tour operation Head	Pagumen Ethiopia Tour and Travel S.C	+251912187773
6	Metasebia G/medihn	Tour operation Manager	Simba Tour and Travel	+251 91 339 2098
7	Seife Ayyalew	General Manager	Nile Ethiopia tour	+251947232474
8	Yonas Ketema	General Manager	Johna Ethiopia Tours	+251911143223
9	Ermias Segen	General Manager	13 Suns Ethiopia tour	+25111 662 6071 +25191 152 8878
10	Ermiyas Ketema	General Manager	Stunning Ethiopia Tour	+251911441773
11	Tariku W/Aregay	General manager	Yama Ethiopia tours	tarik@yamatoursethiopia.com
12	Ms. Seble Sirak	Tour operation Manager	Image Ethiopia Tour and Travel	+251910022378
13	Zelalem Tadele	Operation Manager	Zelalem Ethiopia Tours	Zelalemtadele@gmail.com
14	Daniel Ademe	General Manager	Source Ethiopia Tour	+251 911898918
15	Yonas Tiku	General Manager	Yonas Tiku Tour	+251911905748

No.	Name	Designation	Organization	Contact Address
16	Seid Maounie	General Manager	Seya Ethiopia Tour	
17	Ayinalem Hindeya	General Manager	Ay Raisen Ethiopia Tour	+251940123758
18	Rekik Bekele	CEO	Green scenery tour	rekik@greensceneethiopia.com
19	Muligeta Ababa	General manager	Inclusive Ethiopia tour	+251 79 931 1330
20	Abrham Asayae	Owner Manager	One love Ethiopia tour	+251 91 169 3014
21	Dawit Dibaba	General Manager	Vacation Ethiopia Tour	+25119903131
22	Jemal Barega	General Manager	Mimosa tour	+251911540085
23	Genetu Degefu	Tour operation Manager	Balager Tour	+251920491004
24	Birhanu Abera	Tour operator	Kibur Ethiopia Tours	+251913354150
25	Haimanot Yaregal	Tour operator	Admasu Tours	+251945451221
26	Dagimawi Mengiste	Tour operator	Quest Ethiopia Tour	+251911017506
26	Henok Tsegaye	Guide Operator	Diniknesh Ethiopia	+251911877435
27	Ebrahim Kornima	General Manager	Yejoka Tour	+251 911301488
28	Ashenafi Kassa	Tour operator	Kidis Tour	+251 91 1037732
29	Daniel Tesfaye	General manager	Daniel and Firye Tours	+251930012508
30	Yakob Melaku	General manager	Sunrise Ethiopia Tour	+25191223246

Annex 4: Location Coordinates of Tourist Sites

FID	Easting	Northing	Tourist_Si	Place_Arou	Remark
0	474036.17	1004748.4	Enteto St Mary Church Museum	Entoto	Museum
1	473794.84	1004286.84	Entoto Park	Entoto	Park
2	474107.56	1004711.21	Emperor Menelik II Palace at Entoto	Entoto	Palace
3	473373.9	1000037.71	Ethnological Museum	6 Killo	Museum
4	473825.24	999058.06	National Museum	5 Killo	Museum
5	472671.24	998929.9	St George Cathedral and Museum	Piassa	Church and Museum
6	473927.44	995915.31	Addis Ababa Museum	Meskel Square	Museum
7	474424.98	998221.01	Holy Trinity Cathedral and Museum	4 Killo (parla.)	Church and Museum
8	474055.96	997397.08	Unity park	Grand Palace	Park and Palace
9	473541.59	997303.37	Friendship square	Grand Palace	Park
10	473758.39	999691.41	Yekatit 12 Monument	6 Killo (Hospital)	Monument
11	472869.2	996065.18	Lion of Judah statue	Leghar Railway Station	Statue
12	472790.94	998825.96	Emperor Menelik II Statue	Piassa	Statue
13	472487.74	998778.17	Abune Petros Memorial Statue	Atkilit Tera	Statue
14	472670.85	997098.29	Tiglachin Monument	Tikur Anbesa Hospital	Memorial
15	473996.13	998491.69	Victory Monument	4 Killo (MoE)	Monument
16	473962.91	995966.9	Red Terror Memorial Museum	Meskel Square	Museum
17	473726.77	1002048.9	Shiro Meda cultural clothes Market.	Shiro Meda (USA emba)	Market
18	471222.45	998309.1	Merkato	Merkato	Market
19	472862.47	997217.9	Ethiopian postal museum	Filwuha	Museum
20	471539.95	998530.64	The Grand Anwar Mosque	Merkato	Mosque
21	474168.15	997646.16	Taeka Negest Beata Lemariam Church	Grand Palace	Church and Museum
22	473169.5	999018.59	The Greek Orthodox Church	Piassa	Church
23	473332.74	999040.51	The Armenian Orthodox Church	Piassa	Church
24	472384.46	998421.35	The Nur Mosque	Piassa	Mosque
25	472392.82	998234.39	The nativity Cathedral	Piassa	Catholic Church
26	473066.18	996876.65	Ambassador park	Filwuha	Park
27	474033.03	997146.74	African park	Hilton Hotel	Park
28	478773.43	999587.06	Washa Michael	Yeka/Entoto	Cave

FID	Easting	Northing	Tourist_Si	Place_Arou	Remark
			church		
29	469507.44	1003509.29	Gulele Botanic Garden	Gulele	Entoto
30	470435.26	992500.3	Zoma Museum	Mekanisa	Garden
31	472644.86	1004778.03	The Entoto's Raguel Church	Entoto	Church
32	472759.73	997892.78	Seytan Bet	Tewdros Square	Historical House
33	473580.01	996411.24	African Jazz	Ghion Hotel	Music
34	474768.45	996964.47	Fendika cultural centre	Kazanchis Menaherya	Cultural Center
35	477284.62	993880.91	Yod Abyssinia Traditional Restaurant	Karl Square	Traditional Restaurant
36	475987.25	995001.71	2000 Habesha Cultural Restaurant	Bole Atlas	Traditional Restaurant
37	472994.44	998240.59	Itegue Taytu Hotel	Piassa	Historical House
38	474768.1	994781.11	Makush Art Gallery	BoleMega Build	Gallery
39	473351.4	997092.37	St George Gallery	Sheraton Hotel	Gallery
40	472906.27	997244.73	Souvenir cente	Hilton Hotel	Souvenir Shop
41	475641.3	996297.13	Yama Ethiopia Tour PLC	Capital Hotel	Tour Company
42	481907.34	997222.27	Paradise Ethiopia Travel	CMC	Tour and Travel Plc
43	476300.37	995428.13	13 Suns Tour P.l.c	Bole Edna Moll	Tour and Travel Plc
44	474173.85	995762.52	Stunning Tours and Travel	Bole	Tour and Travel Plc
45	471254.45	993923.22	Sunrise Tour and Travel agent	Bisrate Gebiel	Tour and Travel Plc
46	472919.45	997731.11	Yonas and Yared tour and travel	Jomo	Tour and Travel Plc
47	472165.79	995181.51	Visit Ethiopia Travel	Mexico	Tour and Travel Plc