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**Ethiopian Airlines Role in Tourism Destination Competitiveness: Implications
For Travel and Tourism Development in Ethiopia**

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Abstract

The relevance of air- transport goes far beyond the tourism sector. First, it is a catalyst for socio-economic development. Second, it serves for the integration of host communities within the world community. Thirdly, it enhances the development of a strong Travel and Tourism sector in supporting the hospitality job creation, and also it raises national income. All in, it benefits the general competitiveness of economies through improvements in hard and soft infrastructure investment. And yet, tourism is increasingly promoted as an important source of economic growth, especially in Ethiopia, where its contribution has become crucially important to the country's GDP growth ---this in turn, is believed in bringing about a positive impact on the travel and tourism industry GDP in general and hospitality industry employment in particular. However, without an efficient air transport system, it is almost impossible to ensure sustainable Travel and Tourism development, for the landlocked developing nations, like Ethiopia. Indeed, almost 100 percent of the international tourists arrival to Ethiopia have been ensured through Air-Transport in Ethiopia .To achieve the objective of the study, mixed research approach was employed. Primary data was collected through random sampling and purposive sampling techniques; concurrently from 360 international tourists who used to arrive in Ethiopia, in March and April 2019,from tourist generating regions, for leisure as well as business travel. And 40 participants were selected from the major stakeholders in the industry and subsequently, triangulation convergence design was applied. An important finding emerged in this study was that, despite EAL has been operating route network expansion in more than 107 bilateral destination-countries, and 126 destinations throughout the world, as a key role in attracting and onboarding inbound tourists through conventional and digital media aggressively; yet travel and tourism destination competitiveness Index (WTTC, 2007-2017) rank of Ethiopia since 2007- 2017/18, was averaged only 118.33/140). Hence, it hasn't been significantly improved; nor Ethiopia's world heritages hadn't been well promoted by international tourists in the globe. Furthermore, the core finding of the study has shown that there was a loosely created synergy between the EAL's key roles and its major stakeholders' strategic plan. Ultimately; their plans were merely linked within the EAL's vision 2020. However, a number of limitations need to be considered, due to tourist service infrastructure and a loosely created synergy among the major stakeholders in the industry; yet Ethiopia is not significantly benefited from the existing tourism potential--UNESCO's world heritage sites in Ethiopia. Although the study has framed the preliminary findings, and yet further research should be done to better understanding of EAL's key roles, in line with vision 2035, in tourism destination competitiveness perspective.

Keywords; Destination competitiveness factors; Destination competitiveness indicators; Ethiopian Airlines; Travel and Tourism development; World Travel and Tourism Council (WTTC)

INTRODUCTION

1.1 Background

The theoretical framework of tourism destination concept has laid its foundation on the Leiper's system (1995) theory---a tourism system which is composed of five elements (e.g., the traveler-generating region; a tourist region that connects the region to the destinations, the tourism destination region; the tourist; and the tourism and travel industry). Indeed, the primary benefit of this system theory is that, it clarifies something that would otherwise be complex. According to Leiper (1990), each element in the system interacts with each other and is being impacted by the system that contributes to the existence of the touristic products.

Likewise, Leslie (2000) elaborates this system to its holistic view, which is in turn; important because it includes all tourism key components like the movement of tourists, mode of transport which they use, accommodation, and tourism infrastructure and activities at the destination.

On one hand, the conceptual framework of tourism destination competitiveness describes that tourism destination competitiveness is a multi-dimensional concept in the system which requires superiority in several aspects that arises from the unit of analysis and perspective of analysis (Crouch and Ritchie, 1999): And hence, competitiveness is both a relative concept (i.e. compared to what?); and its concept is multi-dimensional----what are the salient attributes, determinant factors, and indices which qualify tourism competitiveness? Or how do the system's attributes influence its operation? And how the inputs and outputs of the systems performance can be quantified? Of course, it is important to be aware of which factors are determining the competitiveness in the system where a country's competitive position is weakest or strongest, how competitiveness is changing and why these changes are occurring. To this effect, Dwyer et al (2000) argues that patterns of change in demand therefore need to be examined in the light of changes in supplying countries of origin, tourist's personal motivation, destination attributes and pushing factors influence tourists to visit a particular destination and how likely it is to be different from those of other destination countries in tourism destination competitiveness rank

On the other hand, tourism has increasingly been promoted as an important source of economic growth, especially in developing countries and there are many elements that contribute to tourism growth,

Table 1. Travel & Tourism Industry GDP%; and its Contribution to destination competitiveness' rank, compared to some African destination - countries

Key indicators	Ethiopia's Rank 2017(116/136)	Kenya 2017(80/136)	South Africa 2017(53/136)
International tourist arrivals	864000 T&T industry GDP% us\$25042.2 million ,4.1%	1114100 T&T industry GDP% us\$2296.0 million ,3.9%	8903773 T&T industry GDP% us\$9339.9million, 3.0%
International tourism inbound receipts	Us\$394.9 million T&T industry employment 1013860 jobs 3.6%	Us\$723.0 million T&T industry employment 592300 jobs 3.5%	Us\$8234.7 million T&T industry employment 702824 jobs 4.5%
Average receipts per arrival	Us\$ 457.1	Us\$649.0	Us\$ 924.9

Source: Researcher's computational representation, and it is adopted from WTTC, 2017, for illustration

but yet, without an efficient air transport system, it is almost impossible for landlocked developing nations, like Ethiopia where almost 100 percent of the international tourism arrivals make possible through the air transport(this means, with extreme cases, 100 percent of all international arrivals account for this form of transportation is done by air-transport) as sited in (Eric2013; Bieger 2002). To this end, the most important question is whether the air-transport's contribution is viable in promoting and attracting international tourist arrivals to its destination country. And whether it determines the destination country is attractive and competitive or not? And subsequently, this implies that travel and tourism and hospitality industries both

simultaneously work more closely for mutual benefit in the system. Dwyer et al (2010) highlighted that international aviation agreements were negotiated between countries with no reference to any negative impacts that they might have on other industries, especially on tourism. Consequently, until recently, the economic impact of air transport has often been investigated that with no explicit reference to the negative effects on travel and tourism industry. This can partly be explained by the discrepancies between tourism and aviation industries synergy which help to measure tourism supply and demand sides.

More importantly, the relevance of air transport goes far beyond the tourism sector. First, it is a catalyst for socioeconomic development. Second, it serves for the integration of host communities within the world community. Thirdly, Thirdly, it enhances the development of a strong Travel and Tourism sector in supporting the hospitality job creation, it raises national income, and also benefits the general competitiveness of economies through improvements in hard and soft infrastructure investments (as highlighted by Global Agenda Issue Survey; Box 1).

Despite this relevance, air connectivity is one of the major constraints for tourism growth in Africa. As revealed by ICAO- UNWTO (2013) joint research, separate sector policies on air transport and tourism result in, inbound tourism- in Africa is fundamentally or too often even conflicting, disconnected from tourism policy, which constitutes a severe constraint on the development of travel and tourism.. the African Union (African Union, 2016; 42), also pointed out that air connectivity and travel costs remain challenging where air transport in particular and tourism service infrastructure generally, remain, to date, the biggest challenges for travel and tourism development in Africa. And yet, African States have been still non-compliant with Abuja aviation safety targets for Africa. Unlike countries that have been more active in signing bilateral agreements—Ethiopia, Kenya and South Africa, except countries in West Africa rely on privately owned companies, all other African countries still maintaining *unprofitable, inefficient and insecure publicly-owned national aviation companies*

Notably, air-transport service to and within Africa is limited, with relatively few airlines dominating the market. Apart from this, many airline industries in developing countries, even Ethiopian Airlines, which they have been facing sever challenges are *fuel prices, air craft costs, and air fare increases, less quality in tourism service infrastructure, maintenance cost and global mind set of human resource to operate the airlines business*. All in, although the continent

comprises 15 per cent of the world's population, it is served by only 4 per cent of the world's scheduled air service seats (SH and E., 2010). The gaps in air service coverage are particularly acute for intra-African connectivity ((Christie et al., 2014).

Consequently, WTTC (2017) index report shows that Sub-Saharan Africa remains on aggregate, where Travel and Tourism competitiveness was the least developed. Although regional performance has been increased (i.e. data from Africa points to a 7% increase in 2018: North Africa +10%, Sub-Saharan +6%, reaching an estimated 67 million arrivals). And yet, it was improved less compared to other parts of the world. Southern Africa remains the strongest sub-region, followed by Eastern Africa and then Western Africa. On average, Eastern Africa is the most improved region, thus, its showcases are South Africa (53rd), Mauritius (55th), Kenya (80th), Namibia (82nd) and Ethiopia (116th), as its six most Travel and Tourism competitive economies show despite sustained economic growth in Travel and Tourism remains mostly untapped.

Contrast to this, Gloria¹ (2019) witnessed that, “Ethiopia’s Travel and Tourism boom is one of the great success stories of 2018”. In her official visit to Ethiopia, she has also remarked that “Ethiopia’s Travel and Tourism has exceeded its sector’s global and regional comparisons to record the highest level of growth of any other country in 2018, which was driven by the very strong performance of aviation industry in the country and the development of Addis Ababa as a dynamic and growing regional hub.” This indicates that the effort of Ethiopian Airlines has to owe the credit to which it has performed, that is, the performance effectiveness of Ethiopian Airlines is significantly relevant than the major stakeholders in the industry (i.e.it was not by the Ministry of Culture and Tourism; nor the Ethiopian Tourism Organization (ETO)², Hoteliers, nor the hard working effort of Ethiopian tour operators). But it was the strongest coordination between Ethiopian Aviation Authority and Ethiopian Airlines

Therefore, the purpose of this study is to bridge the conceptual as well as empirical knowledge gaps, which were left out by prior studies, while the scholars were under taking studies on

¹Gloria Guevara, WTTC President & CEO - WTTC is the body which represents the Travel & Tourism private sector globally. Members consist of CEOs of the world's Travel & Tourism companies, destinations, and industry organizations engaging with Travel & Tourism.

² ETO- recently its name has been changed into Tourism Ethiopia

Ethiopian Airlines contribution towards tourism destination competitiveness. Indeed, the researcher claims that no such comprehensive studies were undertaken with this title. So, the study was intended to explore *the trajectory between Ethiopian Airlines role in Tourism Destination competitiveness against Travel and Tourism development plan of Ethiopia; or where is their interface?*

2. Research Questions

- To what extent Ethiopian Airlines role is relevant, in maintaining tourism destination competitiveness, in Ethiopia?
- What are the salient factors and determinant indices which qualify tourism destination competitiveness, in Ethiopia?

1.3 Objective

1.3.1 General Objective

The general objective of the study is to explore Ethiopian Airline's key roles in tourism destination competitiveness-----*the trajectory between Ethiopian Airlines role in Tourism Destination Competitiveness against Travel and Tourism development plan of Ethiopia), Where is their interface?*

1.3.2 Specific objectives are to;

1.3.2.1 Assess Ethiopian Airline's key roles in terms of maintaining Ethiopia's *rank in Tourism destination competitiveness* within the global-destinations;

1.3.2.2 Examine the performance effectiveness of tourism destination determinant factors and indicators of Ethiopia; and

1.3.2.3 Identify the challenges which Ethiopian Airlines encountered while it has been performing the tourism destination competitiveness role

3. Literature Review

Tourism Destination Competitiveness models could be divided into *three as* Crouch (2011) discussed. These models have been taken as the research areas in many scholars because there are tended to be aiming at diagnosing competitive positions of specific destinations; the second group of models focus on particular aspects of a destination's competitiveness, as the destination's positioning or management systems. The third and last group aggregates general models and theories that are not centered in specific attributes or destinations. Probably as a result of a demand for wide range application models, the most broadly used type is concentrated in the third group, with emphasis in the major works developed by Crouch and Ritchie (1999), Dwyer and Kim (2003), World Economic Forum (2007) and, recently, Sánchez and Lopéz (2015), whose factors are summarized in Figure 3. More recently there are a number of studies that focus on the causal relationship to the dependent variable, factor interaction and relative weights of the different indicators in the overall competitiveness index (Croes, 2011, Zhang et al., 2011 and Huang & Peng, 2012).

According to Mazanec and Ring (2011), for an index to achieve its objectives it has to use competitiveness variables that exhibit significant relationships with tourism performance criteria. Although most destination competitiveness models used in the tourism literature rest on Porter's (1980) five forces of competitiveness and Porter's (1990) diamond of national competitiveness, there is an extensive research involved both in understanding and explaining destination competitiveness and in the development and application of destination competitiveness models. Within this context, some models are strongly concentrated in the conceptual consistence of the approach such as Crouch and Ritchie (1999) and Dwyer and Kim (2003), who aim to support worldwide developments and applications, while others, more rigid in the guidelines, point to the delivery of an annual national competitive index such as WEF (2007).

Accordingly Tourism destination competitiveness paradigm (Ritchie and Crouch 1993) is now widely accepted as the most important factor determining the long term success of Destination Management organizations, industries, regions and countries (Kozak and Rimmington 1999).

Hence, there is a need to explore the different types of indicators relevant to the different contexts (levels) in which destination competitiveness specific or integrated model can be applied. The model developed herein is intended to be able to serve as a framework for determining the competitiveness of an entire country as a tourism destination as well as its sub regions. It would be interesting to explore, for example, the relevance, advantages and limitations of the model for determining the competitiveness of a city or geographically small destination or country as a destination, while the model developed herein is intended to have generic import, and expectations to which specific problems may arise in particular applications.

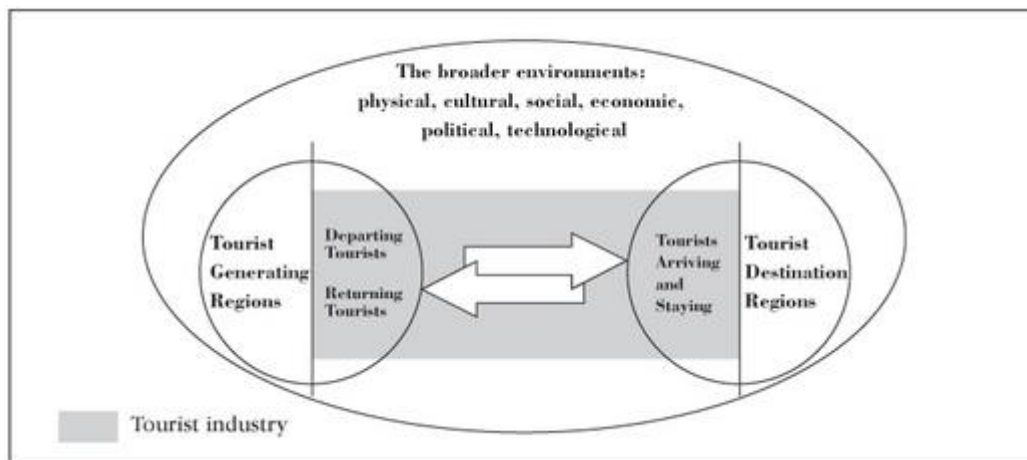
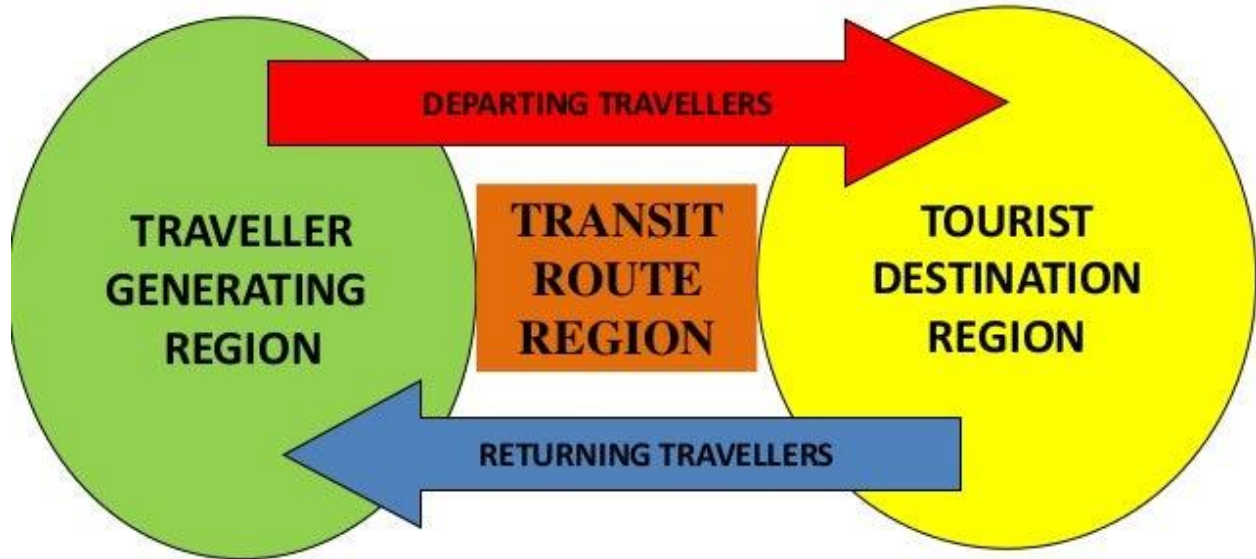
In this way, the first Theoretical Model is developed by Neil Leiper

3.1 Neil Leiper's Whole Tourism System Model

Neil Leiper devised a Whole Tourism System Model in the year 1979 and the same was restructured in the year 1990. It is completely based on the Systems Approach consisting of three major components or elements. The following are the four components embedded in the Leiper's model.

THE TOURISM SYSTEM

“One of the leading models of tourism Attraction systems was created by Leiper in 1990”



Source: Adapted from (Neil Leiper, 1990)

3.2. The Ritchie and Crouch's model of TDC

According to Ritchie and Crouch model (2003), this conceptual model of TDC has about 36 attributes classified into six key factors: core resources and attractors, Supporting factors and resources, Destination policy, planning and development, Destination management and Qualifiers and amplifiers. The variables in the model explain and measure more direct and immediate impact than the macro environment elements.

3.3 The WEF Travel and Tourism competitiveness index (TTCI)

This is the major well organized undertaking of developing tourism destination competitiveness at international level. This has fourteen pillars that measures countries TDC under three sub-indexes. Sub-index A: The travel and tourism regulatory framework; Sub-index B: The travel and tourism business environment and infrastructure; and Sub-index C: The travel and tourism human, cultural and natural resources .The WEF has magnificently devoted into going beyond the listing of indicators to methodological development for analysis and policy purpose. It has also a data base for the indicators setout beginning from 2007.

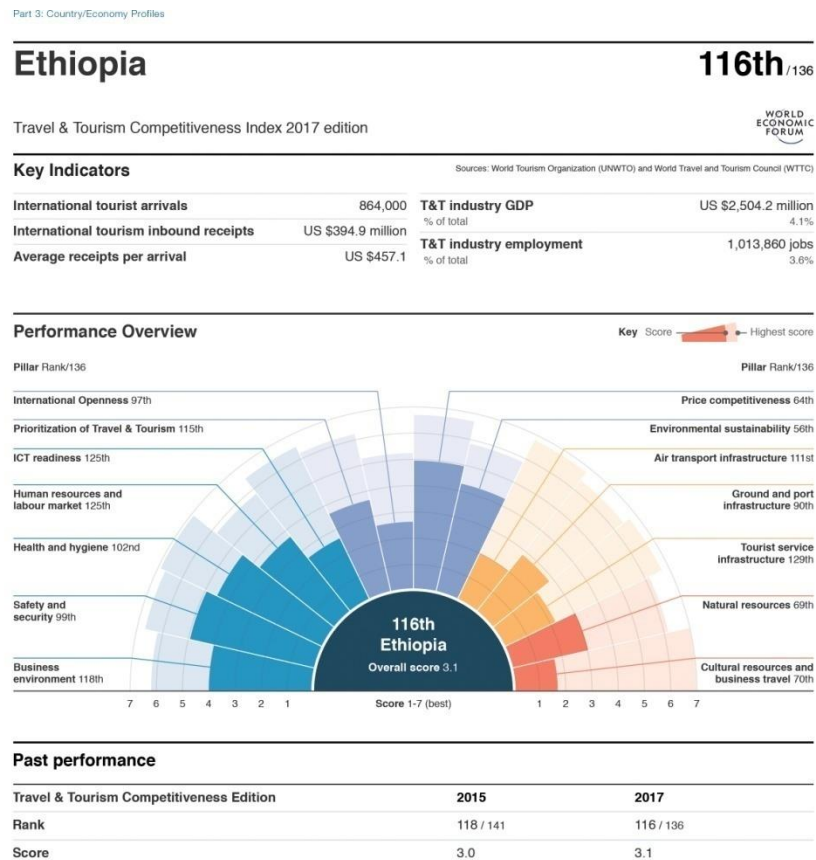
Fig.2...Travel and Tourism Competitiveness Index (TTCI) Model adapted from World Economic Forum (2017)

The T&T Competitiveness Index 2017 framework



Source: Travel and Tourism Index 2017 – adopted from WEF for the study

Fig 4: Travel and Tourism Destination Competitiveness Rank given to Ethiopia in 2017

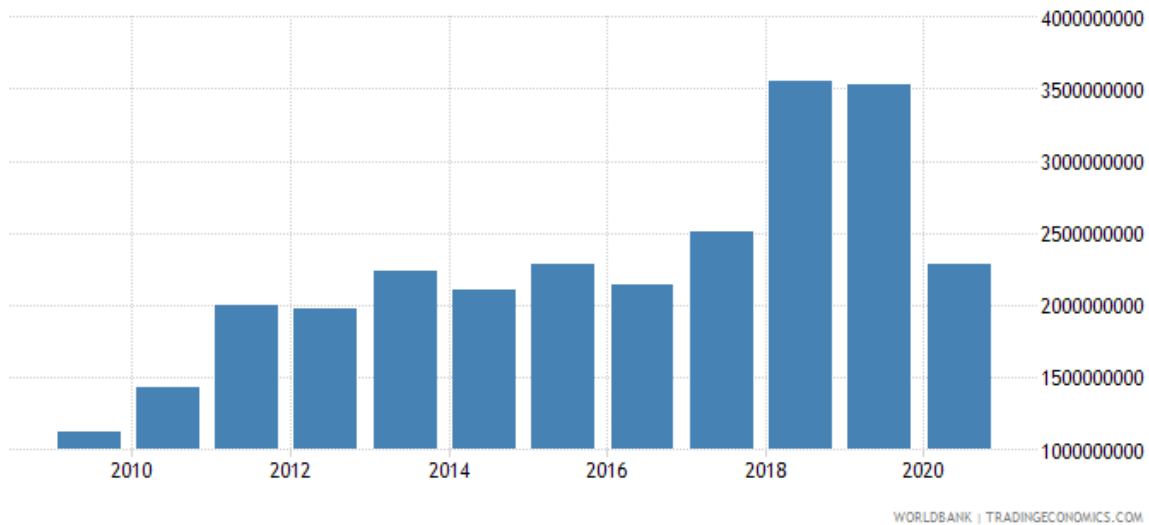


Source: Travel and Tourism Index 2017 – adopted from WEF for the study

According to the World Bank collection of development indicators, compiled from officially recognized sources. Ethiopia - International tourism, receipts - actual values, historical data, forecasts and projections were sourced from the Ethiopia Competitiveness Index

The most recent 2018 edition of Global Competitiveness Report assesses 140 economies. The report is made up of 98 variables, from a combination of data from international organizations as well as from the World Economic Forum's Executive Opinion Survey. The variables were organized into twelve pillars with the most important including: institutions; infrastructure; ICT adoption; macroeconomic stability; health; skills; product market; labor market; financial system; market size; business dynamism; and innovation capability. The GCI varies between 1 and 100; higher average score means higher degree of competitiveness. With the 2018 edition, the World Economic Forum introduced a new methodology, aiming to integrate the notion of the 4th Industrial Revolution into the definition of competitiveness. It emphasizes the role of human

capital, innovation, resilience and agility, as not only drivers but also defining features of economic success in the 4th Industrial Revolution.



Source: Researcher's Computational Representation; and Adopted from WTTC, 2012-2017, WEF, GCI and UNWTO: World Bank, 1st April 2022.

Travel and tourism destination competitiveness Index (WTTC, 2007-2017/ 18) rank of Ethiopia, was averaged only 118.33/140) destination –countries. Likewise, World Bank (2019), in its ease of doing business ranking 2020 report, Ethiopia was ranked as 159/190 countries

In fact the competitiveness measured the economic performance of Ethiopia has a linkage with travel and tourism industry. As the result, the rank of Ethiopia averaged 118.33/140 from 2007 until 2017/18, reaching an all-time high of 127 in 2014 and a record low of 106 in 2012.

4. Methodology

4.1 .During Related Literature Review Process, the following Documentary Sources were

- Secondary data from (WTTC, WEF, UNWTO, WTTCI, 2012- 2018) indicators result report on Ethiopia
- Desk review/ Snap shots of ECAA, MoCT, ET and Travel Ethiopia's (i.e. policy documents, strategic plans, reports, magazines, websites, archives, etc.
- Descriptive statistics analysis (i.e. like frequency distribution; mean, median, mode, SQ, etc).
- Time Series analysis for trend analysis for International tourist arrivals, Tourism contribution to GDP, to Job creation, Foreign exchanges and Investment, revenue generating for Hospitality Industry, etc. using charts, bar graph, pie chart , histogram , and line graph

Then, Empirical (Primary) data was administered from firsthand .For example, survey questions, semi-structured interviews, in-depth interviews, interviews with Key Informants (KII), informed observations and field visits were held within the selected stakeholders (i.e. Ethiopian Airlines, Ethiopian Civil Aviation Authority, Ethiopian Airports; Ministry of Culture and Tourism and Tourism Ethiopia; and from International tourists) in Addis Ababa. Whereas, documentary reviews were employed as a secondary data source during the data collection was held. In addition, archives, journals articles, websites and reports were also used as a secondary data source.

4.2 Data Collection Techniques and Tools

To administer the data collection, various data collection techniques and tools were applied. Filled out survey questions were collected back from the respondents through electronic mails and personal contact on the spots (i.e., from offices; from two targeted International Hotels- Radisson Blu and Sky light Hotels; from national museum and Institute for Ethiopian Studies,(IES) inside Addis Ababa University; and from Bole International Air- port in Addis Ababa These places were ideally selected to meet international tourists during the questionnaires were distributed, and to getting collected the filled out survey questions.

On one hand, policy documents and strategic plans were reviewed into tourism related interlinks and their importance of interdependencies. Field observations took a number of forms. For instance, the researcher has observed the operational environments of the selected sectors and industries during data administering was held (in March and April, 2019); the researcher contacted international tourists face-to-face on the spots whilst collecting the filled out survey questions. It was observed that the tourists have had extensive traveling experiences in Ethiopia and elsewhere in Africa, and they have provided information about their experiences towards the cost of the travel, air-transport facility, air-ports ground handling ,safety and security; and also they have shared their live experiences in service satisfaction, visa issuing, and tourism service infrastructure quality, etc. through the distributed survey questionnaires in tracking the respondents' (International tourists, Key informants from each industry) level of agreements by rating for the provided each survey question, which was intended to determine tourism destination competitiveness ranks of Ethiopia in Africa and beyond. The survey questions which determine Ethiopian TDC position were designed to measure tourism enabling factors and attributes in a 5 point (likert, 1932; 7) scale survey with endpoints of (1) strongly disagree and (5) strongly agree .

On the other hand, the quantitative data collection was held on the basis of the KII and FGDs guides and checklists, in -depth and open and closed-ended questionnaires. To this end, the participants responded in terms of extent on which they agreed or disagreed and this enabled the researcher to dig into the cognitive as well as the affective aspects of the respondent's attitude in the embedded matter attitude in the embedded matter.

Then, the key indicators which were developed into homogeneous group (.i.e. enabling factors and attributes in a 5 point scale to address the research objectives) were organized around those **four** categories are:

- ❖ The key indicators which are measuring the tourism performance and impacts (i.e. Air- transport services, Air transport infrastructure, Prioritization of Travel& tourism and Travel & tourism operational environment)in addition to a number of international tourist arrivals to Ethiopia;
- ❖ Indicators which are identified to determine the ability of a destination to deliver quality and competitive tourism services (i.e. Tourism service

infrastructure, Human resource skills, Health and hygiene of hotel rooms & restaurants, and ICT readiness);

- ❖ Indicators which are monitoring the attractiveness of the TDC of Ethiopia (i.e. Core resources, Cultural resources and business travel, and Environmental sustainability); and
- ❖ Indicators which are describing policy responses and economic opportunities of the destination (i.e. Price competitiveness, International openness, Safety and security, Destination management and Business environment).

4.3 Sampling Techniques

4.3.1 Sample Size Determining Technique

For empirical data, survey questionnaires were developed, on the basis of the purpose, for the study, and they were administered from **360** international tourists who were arrived in Ethiopia in the months of *March and April, 2019*; along with **40** participants who have been working for Ethiopian Airlines and Airports, Ethiopian Civil Aviation Authority, Ministry of Culture and Tourism, and Tourism Ethiopia. *Through the random sampling technique*, the sample size was determined (360 international tourists). And (40) participants were selected purposively, for the investigation of valid information from the target population. Furthermore, for appropriate sample size determination, from the target population, statistical formula which was developed by Yamane (1967) was used for sample size determination. It was computed as follows:

Assumptions

A 95% confidence level, and $e = \pm 5\%$

$n = \frac{N}{1 + Ne^2}$ was used to select appropriate size of participants in the sample.

Where, n = required sample size,

N = The population from which the sample was taken (International Tourists, who were expected to arriving in Ethiopia in the year 2019, existing data base for international tourist arrivals in 2015, 2016, 2017 and 2018; plus 22 staff members from ET Holidays and Ethiopian Air ports to represented Ethiopian Airlines; 11 participants from ECAA who

represented Ethiopian Civil Aviation Authority (specifically regulation directorate³) ;3 participants who represented research directorate of MoCT, and 4 participants who were from Tourism Ethiopia - representing markets research and public relations of the organization.

International tourists who were registered for their visit in Ethiopia in 2017, were **933,000*** (6%) = **988,980**) source: world Tourism Organization data base (UNWTO, 31 January 2019)

2018. **988,980* 0.06**

2019. 1,048,318.8

Thus, $1,048,318.8 + 22 + 6 + 5 + 3 + 4 = 1,048,358.8$

e^2 = the level of precision (Sampling error)

Hence, the required sample size was calculated as: $\frac{1,048,358.8}{1 + 1,048,358.8 * 0.0025} = 399.8$

From the total population of **1,048,358.8** using the above formula **400** samples of respondents were selected (i.e., out of 400 samples, 360 or about 90% of the respondents were international tourists; and only 10% of them were target group- participants who were from the major stakeholders in the Travel and Tourism industry).

4.3.2 The Concept how Sample Penalty was applied

The concept of sample penalty was duly applied here as some rigidity is required that data from **399.8** would be collected excluding incomplete answers and unfilled survey questions. According to James et al. (2001), it could be assumed that about 75 percent of the distributed questionnaire would be collected back. About 25% might be missing for some reasons, therefore, it was decided that 25% of 399.8 additional survey questions were distributed. Then, 25% 399.8 is 99.95 and 25% of 99.95 is 25, 25% of 25 is 6 and 25% of 6 is approximately 2. Then the total number of questionnaires ($400 + 100 + 25 + 6 + 2 = 533$) were **533**, raised from 400 by **133** and

³ Aviation Regulation Directorate is one of the core areas of Ethiopian Civil Aviation Authority, which is responsible for Safety/ Security oversight functions and for economic regulations. It is headed by the Aviation Regulatory Deputy director general and it comprises:

1. Air Transport and Planning Directorate;
2. Air Navigation Regulation Directorate;
3. Air craft Registration and Air worthiness Certification Directorate;
5. Aerodrome Safety and Standards Directorate ; and
6. Aviation Personnel and Training Organization Certification Directorate

collection was conducted up to the needed correct amount was gained. When the response rate reached 100%, collection was stopped after complete **400** were collected.

Table 3.1 the number of International Tourist Arrivals since 2012

No.	Number of International Tourist Arrivals to Ethiopia since 2012	Year of Tourist Arrivals
1.	596,341	2012
2.	681, 000	2013
3.	770,000	2014
4.	864,000	2015
5.	868,780	2016
6.	933,000	2017
7.	988,980*	2018
8.	1,048,318. 8** +40 = 1,048,358.8	2019

* 933, 000* 6% of 2017 data=988,980 in 2018

**988,980 *6% of 2018 data=1,048,318 in 2019

Source: WEF, 2012- 2017; Travel and Tourism Competitiveness Index 2017 framework; and world Tourism Organization data base (UNWTO, 31 January 2019).

Table 3.1 illustrates the number of international tourist arrivals to Ethiopia since 2012 by which the researcher uses data analysis and interpretation later on

4.4 Data Analysis Techniques

4.4.1 During data analysis, the following phases and steps were undergone. In phase one, secondary data was analyzed on the basis of methodological and research questions design; Such as, Federal Democratic Republic of Ethiopian (FDRE) Constitution; Growth and Transformation Program (GTP I and II); Ministry of Culture and Tourism (MoCT) policy and strategic plan and Ethiopian Transport Policy; and Ethiopian Civil Aviation Authority's (ACAA) regulatory framework were reviewed. Subsequently, strategic plan of major stakeholders in the industries and their accomplishments, achievements and gaps were identified; and documentary analysis

(Reports, Archives, etc.) was incorporated and analyzed: interpretations had been conducted. For example, one of the objectives on which analytical review was held about Ministry of Culture and Tourism of Ethiopia's (MoCT) strategic plan's (2016-2020) objective was that?

1. To turn Ethiopia into a particular preferred top five destination in Africa in 2020
2. To increase tourist receipt from the current USD 250 million to 3 billion in 2020; and
3. To endowed Ethiopia with Tourism attraction potentials; however, the result shows that MoCT did not meet even a single objective nor it has revised its national tourism promotional strategy (For instance, there was no any effort that MoCT has exerted to establish offices where Ethiopian Embassies exist in the world unlike Ethiopian Airlines did.)

Finally, Conclusion was drowning on how *EAL has been playing its key roles in Tourism destination competitiveness positioning against some other complete countries in Africa and in the globe as well. Then, the research questions which were developed on that gap were- How the Ministry of Culture and Tourism (MoCT) has been implementing the national tourism policy in a synchronized way with its major stakeholders (i.e. Ethiopian Airlines and Ethiopian Civil Aviation Authority, Ethiopian Tourism Organization, and hospitality industry), in order to achieve Ethiopian tourism destination competitiveness positioning through EAL? And, to what extent the EAL's role is truly competitive to increasingly attract tourists from the globe and to what extent Ethiopian Airlines is promoting Ethiopia's national and historical tourism potentials and attracting them to visit?*

4.4.2 Phase two: On one hand, the qualitative methodology was applied (Bernard, 2000: 50-51) construct validity in the content and descriptive analysis part. And primary data-- including field observations and key informant interviews were augmented with close ended and open ended survey questions, for each industry study purpose (For instance, interview and field notes) to be interpreted as a qualitative data. In addition, semi –structured interviews were transcribed and coded to obtain the result.

5. Results

5.1 Data Presentation of International Tourist Arrivals

Country Origins of the Tourists	Frequency	Percent
United States of America	63	17.5
Germany	40	11.1
Spain	33	9.2
France	27	7.5
Australia	22	6.1
Denmark	20	5.6
United Kingdom	18	5.0
China	14	3.9
Kenya	12	3.3
Canada	12	3.3
Ireland	11	3.1
Japan	11	3.1
Norway	10	2.8
Egypt	9	2.5
Italy	8	2.2
India	8	2.2
Holland/The Netherlands	7	1.9
Malaysia	7	1.9
North Sudan	7	1.9
New Zealand	7	1.9
Belgium	4	1.1
Mexico	4	1.1
Zambia	3	.8
Hungary	1	.3
Romania	1	.3
Comoros Island	1	.3
Total	360	100.0

Source: own survey, 2019

Table 5.1.1 illustrates country origins of the international tourists, frequency, and the percent that the respondents represent.

Through this data presenting tool, the researched was intended to explore to what extents EAL has been playing its key roles in onboarding and attracting international tourist inflows to Ethiopia. It was observed that, while in the field checklist during administering the data (*from March-- April, 2019*). The table describes lists of countries and their corresponding percent of tourist arrivals, which has been indicated according to their descending order (*i.e. United States of America 63(17.5%), on the top; and German follows with, 40(11.1%) whereas, Comoros*

Islands from Africa; Hungary and Romania from Europe were the least **1(0.3%)** in tourist arrivals to Ethiopia during the observation was held. In fact 99% of the respondents (international Tourists) said that they were arrived in Ethiopian by Air- transport from different parts of the world, while each of them were asked to respond their travel experience, level of tourism service satisfaction, their observations over their expectation to the visiting destinations within the country, however, each of the tourists has responded differently one from the other. For instance, a tourist from Norway, he explained his expectation, shortly after he got landed at Addis Ababa International Air-port said that, *“I have not visited the tourist sites yet, but I could say, unless EAL put sufficient amount of budget in the tourist service infrastructure (i.e. air-port handling system), it doesn't attract many more tourists to Ethiopia, the way Ethiopian air- port today, it won't be able to attract many tourists.”*

The researcher also attempted to investigate whether the international tourist arrivals, is meant that how they were treated, or being hosted according to their demand conditions; being treated according to the purpose of their visits; and being served according to the standard level of tourism services delivery and destination offerings over their length of stay. Contrast to this, a tourist from Africa (Comoros Islands) responded that,

This is my first flight to Ethiopia. I haven't seen the tourist sites of Ethiopia yet; and other countries as well, and yet, I do not have different flight experiences and different Airlines services get offered to compare and contrast with EAL. Even so, I couldn't notice the service that ET has on boarded, but I can recommend that I am fully satisfied with the service offering and proud of the Ethiopian Airlines – as an African pride

In fact, each tourist's purpose of the visit to Ethiopia and length of stay is different one from the other. For instance, the researcher has observed that the tourist's behavior whose arrivals were from United States of America, Europe, Asia, Africa; or Australia was that, they wanted to be treated according to their tour and travel experiences and geographical origins

Table 5.1.2 Geographical origins from which Inbound Tourists were arrived to Ethiopia, and their Sex categories

No.	Contents/Country	Sex		Total
		Male	Female	
1.	Europe	82	97	179
2.	Asia	17	23	40
3.	USA	34	30	64
4.	Africa	24	8	32
5.	Australia	9	13	22
6.	Canada	5	7	12
7.	New Zealand	2	5	7
8.	Latin America	1	3	4
	Total	174	186	360

Source: Own survey, 2019

Table 5.1.2. illustrates visitors' geographical origins and their sex categories

6 Discussion

This section discuss what the results mean, on which findings were emerged from the data presentation from the survey, *based on the specific objectives of the study*. Specifically, important constructs of TDC determinant factors and indicators' performance effectiveness of Ethiopia, as a destination, is presented for discussion, compared to African destinations or the global ones as the source markets. In this connection, findings for Ethiopian Airlines key roles, in tourism destination competitiveness, could be explored from the discussion

First and foremost, the researcher has employed ordinary indicator measures or nonmetric data analysis methodologies (i.e. nominal scales, ordinal scales and frequency description), instead of employing multiple discriminatory analysis and logistic regression to be used to indicate mean value for each indicator. However, the implication for which the study has employed was substantial because (Hair et al., 2006) underlined that multivariate are devised solely to deal with nonmetric data analysis (i.e. *Exploratory Factor Analysis, Nonmetric correspondence analysis, factor analysis or confirmatory factor analysis*), technique has been applied .And hence, the factors were taken as homogeneous groups framed with variables solidly correlated to each other and independent from the rest.

Thus, it is an appropriate technique the researcher has applied to examine that they are used appropriately to indicate their relationships to which they have been developed through multi-item scales for each construct (factor), by assessing each of the relationships simultaneously rather than in a separate analysis. To this end, the average percentage of the variance which was extracted from the TDC determinant factor was a specific confirmatory testing for the convergent validity. Then, the factor analysis provided thereby has been the transition for the applications of interdependence (e.g., classification of statistical techniques in which the variables were not divided into dependent and independent sets; rather, all variables were analyzed as a homogeneous set within the factor) techniques to the formulation, estimation, and interpretation of multivariate results.

As a result, emerging findings suggests that key indicators which were developed into homogeneous group, to address the research objectives in the study; and which were being organized for the analysis purpose around those **four** categories , meant that,

- The key indicators which are intended to measure the tourism performance and impacts were(i.e. Air- transport services, Air transport infrastructure, Prioritization of Travel& tourism and Travel & tourism operational environment)in addition to a number of international tourist arrivals to Ethiopia;
- Indicators which are identified to determine the ability of a destination to deliver quality and competitive tourism services were (i.e. Tourism service infrastructure, Human resource skills, Health and hygiene of hotel rooms & restaurants and ICT readiness);

- Indicators which are monitoring the attractiveness of the TDC of Ethiopia were (i.e. Core resources, Cultural resources and business travel, and Environmental sustainability); and
- Indicators which are describing policy responses and economic opportunities of the destination were (i.e. Price competitiveness, International openness, Safety and security, Destination management and Business environment).

However, the actual constructs (Factors) which were taken into accounts in this study, for the analysis were: *Core resources and attraction, Tourism enabling service infrastructure, Tourist demand conditions, Destination management, and Travel and Tourism operational environment rather than these four factors- which were identified as the emerging findings in this study.*

In the study, the empirical data analysis result depicts that in the factor analysis of *core resources*, on average, **206(57.2%)** international tourists have rated that cultural world heritage sites of Ethiopia has been competitively attracting the international tourist arrivals to Ethiopia, and, **36(90%)** respondents from major stakeholders also agreed too. Despite its significant disparity that it satisfies individual difference among visitors from different source markets. However, the study's result shows that business travelers tended to visit cultural activities in the city than country because of their purpose of visit and the time that limits their length of stay.

In contrast, Tourists from Europe and Australia have rated that Ethiopia has been slightly performing in core resources over travel and tourism destination competitiveness than Africa and United States of American tourists' who have rated either. This shows, it is under performing despite its full of tourism potentials: underutilized core resources. In the *Tourism service infrastructure factor analysis*, the tourists from all regions of the globe and respondents from major stakeholders as well have rated the construct as the least performing factor of Travel and tourism destination competitiveness similarly as *tourism enabling service infrastructure and Amenities do*. The case of *Tourist demand conditions –to getting visited Ethiopia, the factor analysis shows*, it was found that, the highly performing in travel and tourism destination competitiveness for both international tourists and respondents from major stakeholders was the endowed resource of the country despite the fact that international tourists had evaluated the

construct (factor) against each indicator differently the respondents from major stakeholders counter parts did.

On average, international tourists have rated neutral on their evaluation, about the *country's Travel and Tourism operational environment* except for ICT readiness. Likewise, they have rated slightly similar for the *destination management latent variables, except for Air transport (EAL's services; and yet* tourists from all regions of the globe have observed the least judgment over travel and tourism competitiveness performance effectiveness of Ethiopia's effort for the constructs, but most of them (the inbound tourists) commented on the construct (i.e., the key indicator was), or which has been underutilized was: country branding and promotion

All in, travel and tourism destination competitiveness ranks and scores of Ethiopia which has been determined by the Key indicators, or through which the tourism performance and impacts on (e.g., *international tourist arrivals* and *international tourism inbound receipts*) the travel and tourism industry of the country has been determined, is the Ethiopian Airlines .Indeed, this made possible the country's travel and tourism destination competitiveness by its remarkable effort (e.g., its key roles in playing tourism market segments diversification, on boarding inflow of tourists and in promoting Ethiopia's endowed resources in its global destinations). In fact, within the constructs (the five factor analyses complementary pillars), a tourist from **Sudan** has witnessed about EAL's contribution was that, "by which significantly visible travel and tourism industry development of the country has been observed", and he said,

It is the main gate of the globe to show that Ethiopia is a very rich in historical, natural and culturally potential for its world heritage sites in tourism, for international tourists through Ethiopian airlines

6.1 Based on FGDs and KI guide and Field observation checklist analysis and data interpretation the following challenges and gaps were identified from the respondents over Ethiopian Airlines encountered while it has been playing its key Roles in TDC maintaining:

Their reactions to the close-ended and open ended interviews based on the content analysis -- was that, "what are the gaps / challenges there do you think, in relation to Ethiopian Airline's role in attracting international tourists to Ethiopia, compared to tourist destinations of Africa or beyond? "

One of the participants in the study from MoCT responded as, “The Ethiopian Airlines has been and is being promoting and attracting tourists to Ethiopia for so long. However, the challenges are mainly related to the Accommodation capacity problems, especially in local tourist destination sites. In addition, formerly, the distribution of domestic air network is not as it has to be.” Similarly, a respondent from Tourism Ethiopia said that, “The problem is not about the Ethiopian airlines, the destination by itself has no enough tourism service infrastructures to increasingly attract international tourists, and even it has no air station to make direct flights to many tourist destinations. Before promoting and making tourism markets, destination development should be the first requirement.” However, an international tourist from United States of America replied differently that, “I do not think there are many gaps apart from advertising: it needs more promotional videos on AV services.” contrast to this, a tourist from Spain has reflected on the challenge was, “Slow processing at Bole international *Airport*;

Ethiopia needs to market itself better to the world; its destinations are not so well known as other tourist attractions. Such as, South Africa and Kenyans do.”

Subsequently, **Zewdu H. Mariam**, a key informant from Ethiopian Airlines, provided crucially important information while the researcher was conducting Key informant interview guide, and he pointed out major challenges which Ethiopian Airlines has been facing are classified into Economic, political and social despite the fact that EAL is globally recognized and the fastest growing airlines on the continent.” Among the major challenges from which Zewdu(KII) has focused on were *global business strategy, fuel prices, Aviation industries international competition* (i.e., EAL competes its service with *Emirates ,Lufthansa, KLM Airlines, or British Airway of world class Airlines*), leadership, passengers aircraft cost, human resource skills, maintenance costs, bilateral or multilateral agreements, restrictive regulatory frameworks, and political stability and peace.

In addition, he recalled the economic recession which was happened in 2008-2012 as exemplary lesson learnt from it. “During that period, Ethiopian Airlines was safe, even the famous American Airlines were affected on that economic crises, indeed, Ethiopian Airlines is fortunate because its leaders (group CEO’s) are always supported by governments and the business strategy which they are implementing have been fit globally competitive advantages.” Likewise, Zewdu witnessed for EAL’s strength is that, although EAL faces major challenges, but the

opportunities are huge. First, its ownership of modern fleets and being operated by young professionals; Second, the Airlines international and domestic network expansion and its carrier business strategy has been well established; Thirdly, for its reputation and brand awareness in all over the world; and one of the best leading Airline in customer service excellence.

Furthermore, *Anmut (KII)*, a Key informant from Ethiopian Civil Aviation Authority, pointed out some challenges, strength, and opportunities which he stated were,

Ethiopian Airlines as an airline operator, it is significantly developed, but as a general aviation, it is not developed yet; because there are only few chartered domestic airlines (i.e., Abyssinia and National Airways, and the like) are operating the domestic routes in Ethiopia. But, generally speaking, the backbone for Ethiopian Airlines strength is the aviation's effort in keeping safety and security of the travelers, in deploying well-trained human resource skills and implementing advanced technologies because, safety in aviation industry, it can't be compromised for inbound and outbound tourists as well. In other words, tourists book their flight if and only if they are ensured about the safety and security of the Aircraft's safety record or history as well as the travel and tourism operational environment. Thus, the Aviation's role in travel and tourism industry is safety assurance and facilitation. In like manner, the role of Airlines is, tourism market segments diversifying like Ethiopian Airlines does, tourism service infrastructure developing, and promoting tourist products in its world destinations.

6.2 Conclusion and Recommendations

The following conclusions were drawn from the study. **First**, there are very close links with the air transport role and tourism where two-way relationships exist between them: to promote tourism resources, to contribute to travel and tourism industry GDP increments, and to contribute for employment opportunities in a nationwide. **Second**, linkages between tourism and air transport sector is an increasingly important to play a fundamental role in maintaining travel and tourism destination competitiveness position, and to enhance travel and tourism performance effectiveness of the country. **Third**, to unlock the tourism potential of intersectional linkages, Ethiopia as a destination, all major stakeholders must get connected to a clear airline policy and business strategy ; hence, they ought to create synergy in *travel and tourism industry*, with their importance of interdependencies to Ethiopian Airlines business strategy because travel and tourism destination competitiveness ranks and scores of Ethiopia have significantly been determined by the Key indicators(i.e. *international tourist arrivals* and *international tourism*

inbound receipt) of , exclusively, Ethiopian Airlines key roles, which determine travel and tourism industry's performance effectiveness and impacts, thus substantially, this has to be measured. Hence, it is the EAL key role which made possible the Ethiopian travel and tourism industry to be competent by operating route network expansion within its more than **107 bilateral destination- and 126 countries** throughout the world, in promoting Ethiopia's endowed resources through conventional and digital Medias. It is also the Ethiopian airlines key role which is being played, for facilitating and on boarding tourist inflows to Ethiopia from the globe by its remarkable performance effectiveness and by its huge impacts on the Travel and tourism destination competitiveness activities, apart from other factors and destination determining indicators' efforts where they are performing their own parts.

Conversely, key indicators such as tourism service infrastructure over performance effectiveness of travel and tourism, ICT readiness, human resources skills, health and hygiene of hotel rooms and restaurants, air transport infrastructure and business environment were found critically low in travel and tourism destination competitiveness performance effectiveness in Ethiopia, but relatively prioritization of travel and tourism, apart from this construct, is quite good in performance. Therefore, during resources allocation, these areas require greater attention and investment to enhancing performance of the attributes that fall declining, and can be better if they are diverted elsewhere. In addition, attentions should be given to relatively to the low performing indicators of the Tourism destinations in those constructs. More importantly, inbound tourists have also suggested that these constructs should be improved

Indeed, indicators such as Ethiopian Airlines ticket prices- competitiveness, purchasing power parity (PPP), visa issuance, openness of bilateral air service agreements, people's hospitality; aircraft quality and service satisfaction as well were relatively high performing constructs in Ethiopia. However, those UNESCO's *world heritage sites in Ethiopia* haven't' been significantly computing and known by international tourists. Yet EAL contributions have been marked huge for promoting those world heritage sites in its worldwide destinations and in attracting and onboarding international tourists to Ethiopia. Hence, Ethiopian tourism destination competitiveness is significantly impacted by those factors and indicators (i.e., because of the EAL's key role playing in travel and tourism market making- activities , and availing the tourist products and services to be consumed by international tourists in Ethiopia).So the tourism destination performance effectiveness of travel and tourism in Ethiopia has to be focused on

EAL's key role because tourists have had the experience of highly expensive cities and air-transport ticket-prices which demand them high pricing to consume tourist products and services . But while the Ethiopia context is observed, the result shows that the pricing strategy of travel and tourism's industry is a great competitive advantage for tourists who want to consume products and services comparatively cheaper. For instance the prices of accommodation, transportation, food and beverages were markedly low in cost carriers.

Similarly, it is also a comparative advantage for suppliers to expand their margin of profit by increasing the price on their products by providing quality services. Taking into account and considering tourist service satisfaction, therefore, these areas should be a point of opportunity, of travel and tourism industry in Ethiopia, for maintaining competitive balance at marginally marking better prices. However, price has a dissuasive influence on the choice of tourist activities, and yet if tourists are looking for service satisfaction, they could be less sensitive over price, and price sensitivity can be moderated by this interest in such a way that the negative effect of price sensitivity, which would be diminished; because tourists are rational over their expenditure and in the sense of utility maximizing(Moro, 2018).Hence, this can be enhanced in terms of tourism supply chain systems and institutional capacity buildings through: service philosophy; human resource skills development; destination management; service diversification; tourist activity differentiation and uniqueness; and through accommodation facilities and awareness /image/brand positioning. Despite these efforts that travel and tourism industry has been exerting in Ethiopia, but noticeably, international tourists suggested that country branding should be improved from suffering long existing famine and war image, for its better travel and tourism destination competitiveness positioning.

With regards length of stay, in fact the length of stay for international tourists on average is 10-15 days, but this study finds out that majority of business travelers' length of stay has been identified as *less than five days; or in the range of 5-10 days* in Ethiopia. In connection to this, As a rule of thumb, while tourists planned to spend money, over their length of stay and purpose of visit, they expect value for money or spend fair amounts of money for fair prices of tourist services in use: For instance, for hotel rooms and restaurants, lodging, food and beverages, for land transportation and for domestic flights, they expect to consume standardized tourism infrastructure services. Comfort is also every tourist need at the tourist destinations. Tourists might buy goods and services according to their demand from the availabilities at their

destinations. In the process, financial transactions become the major practices and trends in each tourist spot, to be provided via user friendly automated machines, indeed this should be improved. As people move, they might not move with their physical currency these days, and then they require financial transactions to purchase properties which they want to have. Despite the people's hospitality and friendly hosting manner that the visitors enjoy the most in Ethiopia, and yet tourists require self-services where they move, so that they require user-friendly automated machines for financial transactions. But availing automated machines around tourist - areas was highly recommendable by inbound tourists; and considerably, EAL should charge low price in domestic flights or should avail LCCs chartered air crafts, for price options, for leisure travelers in Ethiopia.

Although Ethiopian Airlines faces major challenges, yet it has been enjoying priceless opportunities to promote Ethiopia as a destination and its tourism resources within its more than 107 bilaterally agreed destinations in the globe. It is also a good opportunity to selling tourist packages because at its *extreme case*, **100** percent inbound total tourist arrivals were ensured via EAL. with its ownership of modern fleets and being operated by young professionals; the Airline's international and domestic monopoly, EA is airlines network carrier hub to make business; it could be also another opportunity for its fast growing option ---- for its brand positioning in all over the world; and this made, it is one of the best leading Airlines in customer service excellence on the continent. Hence, its contribution could be concluded as,

Ethiopian Airlines is doing its best in tourism market segments diversifying---- in inbound tourist receipts, and promoting Ethiopia's tourism resources within its destinations throughout the globe: This in turn, is contributing for, creating employments in the hospitality industry; enhancing national economic growth (GDP); foreign currency earning & investments; and for supporting MICE tourism

Contrast to this, and as it is examined from data analysis, although number of international tourist arrivals have been increased to Ethiopia since 2012, yet Ethiopia's Travel and Tourism destination competitiveness ranks and scores hadn't been significantly improved in the travel and tourism competitiveness index(**118.33/140**) result ranks, unlike some African counterparts did(i.e., South Africa, etc.). Therefore, Travel and tourism destination competitive Effectiveness is more of homework for all stakeholders in the industry, to catch up and maintain its global competitive balance, rather than simply telling us its success story; despite Ethiopian Airlines

immense key roles in contributing for Travel and Tourism industry's development in nationwide, and its highly devoted national growth efforts in connecting tourist markets should be maintained by all stakeholders' collaboration in the industry.

6.2.2 Recommendations

On the basis of the findings, in this study, the researcher has recommended the following:

- The facts that the research design inhabits some characters of exploratory nature, meaning there weren't prior comprehensive studies were conducted in Ethiopia until the researcher undertook this title for the study. So there is no enough reason to prescribe anything before further confirmatory research is conducted, except Hiyab's study (Hiyab,2017) touched few concepts on the study area, to be considered in researcher's confirmatory analysis to test the existing models. And yet, it is assumed that this study should not be the beginning and the end of the research undertakings. However, the study has to come up with certain level of implications which should be forwarded, within its framed preliminary findings, for further research work and to better understanding of EAL's key roles which have been contributing for tourism destination competitiveness perspective. At the same time, the researcher was limited in providing the implications for not to lead to a fast and hard prescription, for the scientific community and the public at large. Hence, extended (with longer spanning period of time) and extensive (with broader scope of the study by applying advanced statistical package-regression mean value to measure each indicator) for the study should be considered, for comprehensive understanding and interpretation. This is, therefore, the study should be augmented with comprehensive, exhaustive, extensive and extended works of enquiry to get refined sets of identified TDC determinant factors and key indicators, for immediate application to Ethiopian airlines role in travel and tourism competitiveness.
- Nevertheless, important findings which were emerged in this study are-- EAL has been operating route network expansion *in 107 destination- countries* throughout the world, in promoting Ethiopia's endowed resources through conventional and digital media aggressively, and subsequently, the numbers of international tourist arrivals to Ethiopia have been increased each year in year out since 2007 . However, travel and tourism destination competitiveness Index (WTTC, 2012-2017) rank of Ethiopia hasn't been significantly

improved, nor Ethiopia's UNESCO world heritages sites hadn't been well known by international tourists in the globe. Therefore, Ethiopian Airlines, specifically, ET- holidays should give special attention to its promotional tools effectiveness (**i.e., Pillar one**). In other words, let Ethiopian tourism resources be well known in the globe through EAL; or ET-Holiday should evaluate its track record that, whether the Ethiopia's world heritages have been promoted effectively with in its global destinations or not? And it should also reevaluate its determination, to promoting them to increasingly attract many more inbound tourists arrival to Ethiopia, in line with vision **2035**.

- The other core finding which was emerged in the study was that, there is a loosely created synergy - the EAL's key roles haven't been considerably interlinked within its major stakeholders' strategic plan; or major stakeholder's in the industry plans were merely linked with the EAL's vision **2020**. To this effect, Ethiopia is not harnessing the existing tourism potential from its natural and cultural UNESCO's world heritage sites. Thus, since EAL has a national growth obligation, it should create a synergy with its major stakeholders because it is a "**Flag carrier Airline**." Therefore, major stakeholders in the industry's strategic plans should be considerably interlinked within EAL vision **2035** (i. e., **Pillar four**).
- Findings on Tourism service infrastructure show that, tourists from all geographical regions, and respondents from major stakeholders in the industry as well have rated fort this construct was poorly performing factor in the Travel and Tourism destination competitiveness similarly as some amenities do. Hence, it was negatively impacting on the performance effectiveness of TDC, or on the Tourist demand conditions which motivate tourist's interest in traveling to Ethiopia. Therefore, it should be improved.
- MoCT should properly manage the numbers of international tourist arrivals to Ethiopia, of each year, for appropriate data retrieval and research validity purpose, by using tools like Tourism barometer, Tourism Satellite Accounts (TSA), etc. In connection to this, although my research scope was limited to Ethiopian Airlines key roles in tourism destination competitiveness, and yet other Air- transport's(i.e., Lufthansa, Turkish Airlines, Emirates, Gulf Air , Qatar Air ways and Air China's) role in onboarding international tourist –arrivals to Ethiopia should be taken into account in further research up takings.

- Tourism destination competitiveness can be achieved if and only if the stakeholders in the industry should be interdependent one another, and should be interconnected and interrelated in a tourism system.
- It is observed that separate sector policies on air transport and tourism result in, inbound tourism- in African in general, and in Ethiopia specifically, is fundamentally or too often even conflicting, disconnected from tourism policy which constitutes a severe constraint on the development of travel and tourism. So, major stakeholders should create a synergy within Ethiopian Airlines strategic vision **2035** for better coordination and to tap untapped tourism potentials in Ethiopia

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