

# An Assessment of Competitiveness of North Gondar Zone, Ethiopia as a Tourism Destination from the Suppliers' Perspective

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## Abstract

**Introduction:** It is important that destinations are able to measure their competitiveness in order to identify their strengths and weaknesses and thereby develop their future strategies. North Gondar's competitiveness as a tourist destination has not been studied and analyzed and so, no study results have been used for an efficient decision making in the sector.

**Purpose:** The aim of this study is to present the results of a survey on the competitiveness of North Gondar as an international tourism destination from a supply-side perspective.

**Methodology:** Both primary and secondary data were used in this research. As methods of collecting primary data, a structured five point Likert scale questionnaire was employed and data was collected from 170 respondents. For secondary data, published; such as books and journals, unpublished statistical materials such as records maintained governmental organizations and researches carried out by individuals, were used. Data was analyzed quantitatively using frequencies, percentages, means, medians, modes and standard deviations in SPSS and results were discussed on importance –performance analysis (IPA) grid.

**Findings:** The study finds that it is only with 33% of the total attributes presented to the respondents that the destination was viewed to be competitive when almost all attributes were seen to be important for the competitiveness of the zone in the international tourism market.

**Keywords:** Tourism; Tourism destination; Tourism destination competitiveness; Factors of competitiveness; IPA grid; North Gondar zone

## 1. INTRODUCTION

### 1.1 BACKGROUND OF THE STUDY

Tourism is a leading economic driver for the 21<sup>st</sup> century. It is an important driver of growth and prosperity and, in developing countries for poverty reduction. Encouraging the development of the Travel & Tourism sector is more important today given its important role in job creation, at a time when many countries, such as in Africa, are suffering from high unemployment. The sector already accounts for 9 percent of GDP, a total of US\$6 trillion, and it provides 120 million direct jobs and another 125 million indirect jobs in related industries (World Economic Forum, 2013).

Destinations lie at the very heart of the travel and tourism system, representing as they do a mix of products that collectively provide a tourism experience to consumers (Ramona et al., 2009).

Ethiopia is a country having a bright future made up of nine administrative regions and two city administrations, often expressed as a wealthy destination in tourism and diverse tourist attractions, which include cultural, historical and archaeological attractions, as well as a great variety of flora and fauna, is set to tap into its immense tourism potential in order to become one of Africa's top five tourist destinations by 2020.

Amhara region is one of the nine administrative regions in Ethiopia, where the three out of the 10 UNESCO registered World Heritages of Ethiopia, are found. Under it the region has 11 administrative zones, one of which is the North Gondar Administrative Zone. North Gondar zone composed of 23 administrative woredas that all together cover an area of 44,760.47 sq.km, the zone (in which more than 2,982,285 people live, endowed with marvellous natural as well as manmade attractions which include churches and monasteries, national parks, medieval castles and palaces, natural forest, rivers and falls, beaches (northern shore of lake Tana), hot springs and spa, mountains, flora and fauna, etc. Two of the 10 UNESCO registered World Heritages (namely the Semien Mountains National Park and the Fasil castle) of the country or of the region respectively are found in the zone (Amhara Culture, Tourism and Parks Development, 2014).

Over the years the flow of tourists to the zone has shown some growth. Tourism, however, has become a fiercely competitive business for tourism destinations all over the world (Annet, 2010). Researchers in the field of tourism have shown that competitive advantage is no longer natural, but it is increasingly man made, driven by science, information technology and innovation. As such it is not simply the stock of natural resources of any given destination that will determine their share in the tourism market, but rather how these resources are managed and integrated with other competences to create a competitive advantage (Jonker, 2004).

Though many studies have been made on the issue of destination competitiveness worldwide, there is a gap that no research has been conducted specifically at North Gondar zone level to be used by responsible bodies to measure the zone's performance. It appears that the matter has been understood by these tourism responsible bodies of the North Gondar zone in such a way that only the comparative advantages (inherited or endowed

resources such as climate, scenery, flora and fauna) of a particular destination can motivate tourists to come and visit a destination than the competitive advantages (destination's ability to use these resources over the long term, and includes resource strategies such as management, skills of workers, service levels, and government policy) plus the comparative advantages.

It is with this in mind that this study sets out to fill this gap, having objectives of identifying the important factors of competitiveness of North Gondar zone as a tourist destination and measuring and reporting on the performance of the zone as a competitive tourism destination.

## **1.2 STATEMENT OF THE PROBLEM**

Tourism in North Gondar, is a reflection of the country (it is immature). However, it still has a great role to play in the local economy. Year after year, what the zone plans to achieve is to increase the volume of tourists who visit the zone and maximize their length of stay. However, North Gondar's competitiveness as a tourist destination has not been studied and analyzed and so no study results have been used for an efficient decision making in the sector.

To address this, the following problems are identified as research questions:

**Q.1.** What are the factors of destination competitiveness to be taken into consideration to increase North Gondar's competitiveness in the tourism marketplace?

**Q.2.** How important are these factors in determining the competitiveness of North Gondar as a tourist destination?

**Q.3.** What does the performance of North Gondar as a tourist destination look like when seen through these factors from the suppliers' perspective?

## **1.3 OBJECTIVE OF THE STUDY**

The main objective of the research is to assess North Gondar's competitiveness as an international tourist destination from a supply-side perspective.

### **Specific objectives**

- To identify the important factors of competitiveness of North Gondar as a tourist destination
- To measure the performance of North Gondar's competitiveness as a tourist destination from the suppliers' perspective
- To examine the performance of North Gondar as a competitive tourist destination

## **2. REVIEW OF LITERATURE**

### **2.1 TOURISM**

"tourism comprises the activities of persons traveling to and staying in places outside their usual environment for less than a year and whose main purpose of travel is other than the exercise of an activity remunerated from within the place visited" (Government of the Hong Kong, 2009). Tourism and travel are not synonyms. All tourism should have some travel, but not all travel is tourism (Bishwanath, 1998).

### **2.2 TOURISM/TOURIST) DESTINATIONS**

Destinations are well-defined geographical areas, such as a country, an island or a town, with an amalgam of tourism products, offering an integrated experience to tourists (Buhalis, 2000; Gabriela, 2012). Destinations are not a single product, but composite products consisting of a bundle of different components including: accommodation and food establishments, tourist attractions, arts establishments and cultural venues, and the natural environment (Pop et al. in Gabriela, 2012). It is a combination of tangible physical attributes (such as product, facilities, location and accessibility) and less tangible attributes (such as service, experience and community attitude).

### **2.3. DESTINATION COMPETITIVENESS**

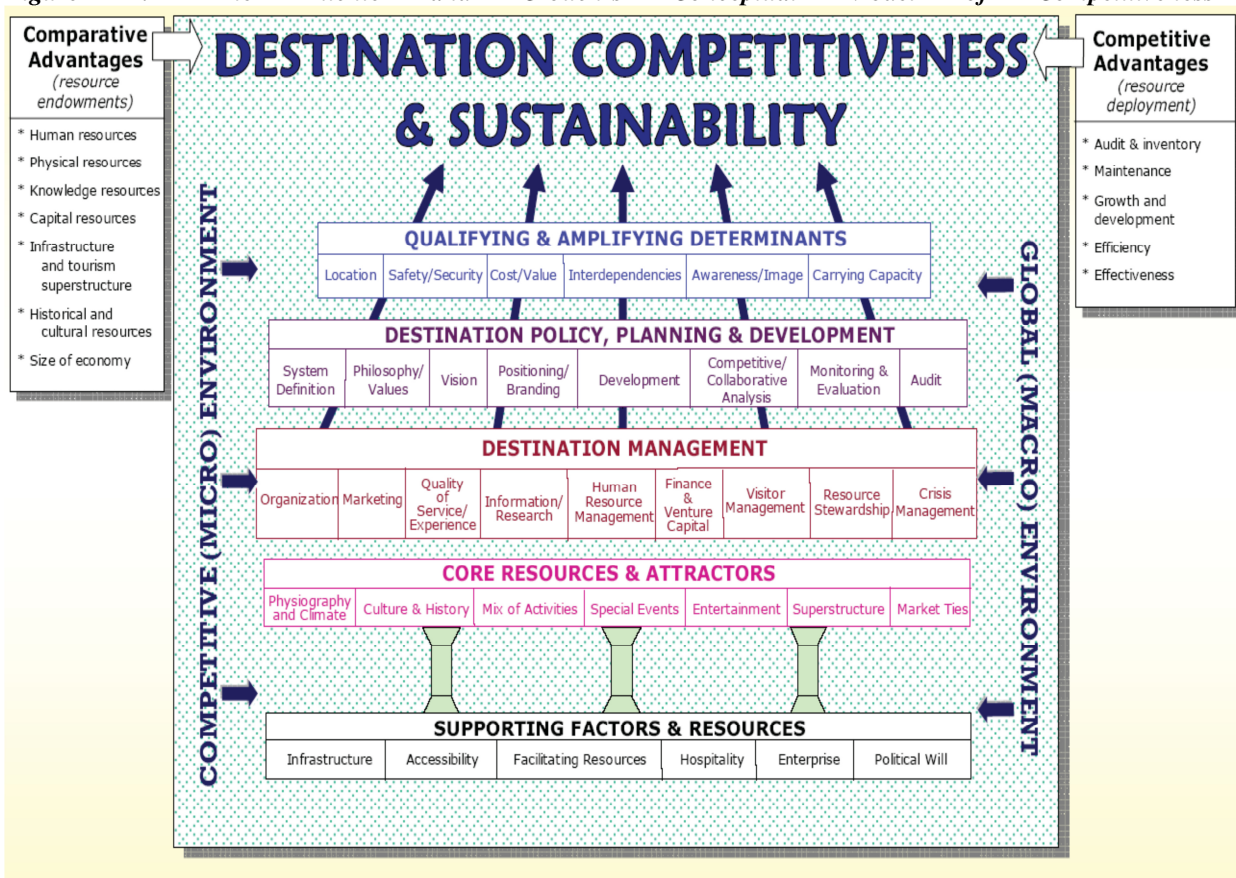
Though, it is not possible to have a single definition of competitiveness in the tourism sector (EU report, 2013). Competitiveness in tourism can be described with the elements that make a destination competitive as defined by Ritchie and Crouch (Gianluca, 2013), 'ability to increase tourism expenditure, to increasingly attract visitors, while providing them with satisfying, memorable experiences and to do so in a profitable way, while enhancing the well-being of destination residents and preserving the natural capital of the destination for future generations'. Thus competitiveness in tourism has several dimensions: economic, socio-cultural and environmental (Ramona et al., 2009). According to d'Hartserre (Fang, 2006), competitiveness is 'the ability of a destination to maintain its market position and share and/or to improve upon them through time'. Whereas in Dwyer and Kim's view, 'Destination competitiveness would appear to be linked to the ability of a destination to deliver goods and services that perform better than other destinations on those aspects of the tourism experience considered to be important by tourist' (Dwyer and Kim, 2003).

### 2.4.1 The Ritchie & Crouch's Conceptual Model of Destination Competitiveness

Crouch and Ritchie developed a destination competitiveness framework (Figure 2.1) which has been widely cited in the competitiveness literature. This model of destination competitiveness (Figure 2.1.) was originally developed by Crouch and Ritchie (1999), was additionally refined in Ritchie & Crouch (2000) and was adequately detailed in Ritchie & Crouch (2003) (Gianluca, 2013). The foundations for the construction of the framework are the concepts of comparative and competitive advantage.

Comparative advantages are those with which a destination has been blessed by God and/or nature (climate, beautiful scenery, attractive beaches, wildlife etc). Comparative factors are close to primary tourism supply (natural, cultural and social attractiveness). We can never reproduce them with the same attractiveness. On the other hand, competitive advantage relates to tourism infrastructure, the quality of management, the skills of the workforce, government policy etc. (Ritchie and Crouch in Doris 2006). Competitive factors refer to secondary tourism supply. They can be produced and improved by the tourist firms or governmental policy. Both kinds of factors are co-dependent. Without secondary tourism supply the tourism destination is not able to sell attractions, e. g. primary tourism supply on a tourist market, and without primary supply the tourism infrastructure is not useful.

Figure 2.1 The Ritchie and Crouch's Conceptual Model of Competitiveness



Source: Ritchie & Crouch (2003)

The model identifies 36 attributes of competitiveness grouped into five key factors which are under constant influence of bringing the issue of competitiveness down to specific areas.

- A. **The global (macro) environment:** Tourism is subject to many influences and pressures that arise outside the system itself - the global or macro- environment. This environment consists of external influences and pressures that have implications on all human activities and are, therefore, not specific to the travel and tourism industry in their effects for it is global in its scope. What happens in one part of the world can have consequences for tourist destinations on the other part of the world.. These macro environmental forces are categorized into six principal groups related to *the economy, technology, ecology, political and legal developments, socio-cultural issues, and the constantly evolving demographic environment.*
- B. **The competitive (micro) environment:** This environment is made up of organizations, influences, and forces that lie within the destination's immediate surroundings of tourism activities and competition. And they tend to have a more direct and immediate impact than do elements of the global (macro) environment,

as a general rule.. Elements of a destination's competitive (micro) environment include *suppliers, intermediaries and facilitators, customers, competitors, internal environment or internal culture* and finally *publics*.

#### 2.4.1.1 The five main groups of factors of destination competitiveness

1. **Core resources and attractors:** the primary elements of destination appeal. It is these factors that are the key motivators for visitation to a destination. They are described as the fundamental reasons that prospective visitors choose one destination over another while other components are essential for success and profitability. They are sub-divided into, *physiography and climate, culture and history, market ties, mix of activities, special events, entertainment, and the tourism superstructure*.
2. **Supporting factors and resources:** A destination with abundance of core resources and attractors but with scarcity of supporting factors and resources, may find it very difficult to develop its tourism industry as the latter provide a foundation upon which a successful tourism industry can be established. One of the most important supporting factors is the condition and extent of a destination's general **infrastructure**.. **Facilitating resources** and services include those such as the availability and quality of local human, knowledge and capital resources, education and research institutions, financial institutions, various areas of the public service, etc. Another important thing is that the tourism industry is full of many small to medium sized **Enterprises**. **Accessibility** within a destination can mean the accessibility of tourism resources such as mountains, national parks, unusual land formations, scenic regions, lakes and rivers etc. Regarding **hospitality**, quite simply, it is not enough to deliver all the attributes of an experience in a cold and detached manner.. And finally, **political will** is not just a function of the attitudes and opinions of politicians alone. **Destination policy, planning and development:** can be understood as the 'intellectual process that uses information, judgment and monitoring to make macro-level decisions regarding the kind of destination that is desirable, the degree to which ongoing performance and related changes in the nature of visitation and the physical character of the destination are contributing to the achievement of the kind of destination that stakeholders want' (Vanhove in Benedetti, 2010).
3. **Destination management:** focuses on those activities which implement, on a daily basis, the policy and planning framework established under *destination policy, planning and development*, enhance the appeal of the *core resources and attractors*, strengthen the quality and effectiveness of the *supporting factors and resources*, and adapt best to the constraints or opportunities imposed or presented by the *qualifying and amplifying determinants*.
4. **Qualifying and amplifying determinants:** These qualifiers and amplifiers moderate or magnify destination competitiveness by filtering the influence of the other three groups of factors. They may be so important as to represent a ceiling to tourism demand and potential, but are largely beyond the control or influence of the tourism sector alone to do anything about. Although destinations have little or no control over these factors, the extent to which destinations act proactively towards the threats and opportunities represented by these factors has likely an influence in their competitiveness.

#### 2.5 WHY (OR IMPORTANCE OF) 'DESTINATION COMPETITIVENESS

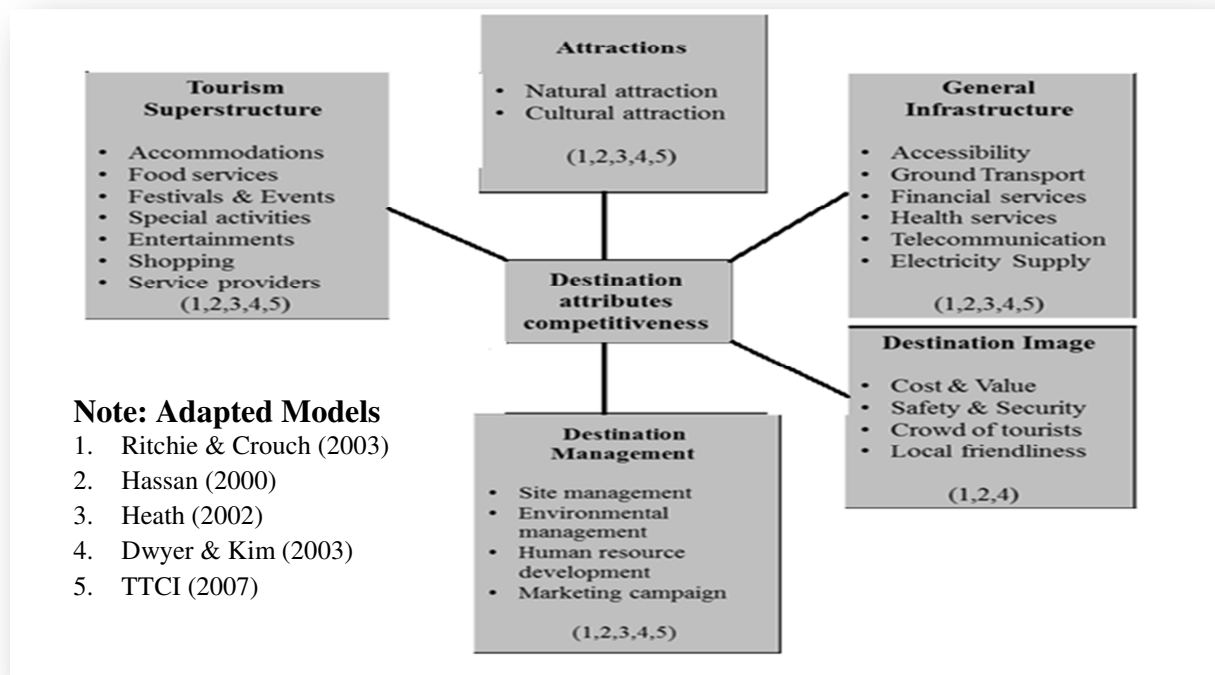
The current tourism market is highly competitive (Piotr, 2014). Increasing globalization, specifically, in the tourism sector in recent decades as well as the increasing significance of the tourism sector in the economies of many nations have made it necessary for local governments to look at the issue of tourist destination competitiveness (Miroslaw, 2012).

Competitiveness is increasingly being seen as a critical influence on the performance of tourism destinations in competitive world markets (Dickinger, in Michael and James, 2005) and that it is now widely accepted as the most important factor determining the long term success of organizations, industries, regions and countries. Chin-Tsai and Ya-Ling (2009) also suggest that tourism country's (destination's) competitiveness is important especially when countries (destinations) strive for bigger market share. And the degree to which a country (destination) can benefit from its tourism sector depends largely on this sector's competitive position in the international market (Gomezelj and Mihali in Chin-Tsai and Ya-Ling, 2009).

#### 2.6 CONCEPTUAL FRAMEWORK

In order to carry out the research on competitiveness of North Gondar zone, a research model was adopted from the authors *Ei Ei Khin et al. (2014)* who have applied the same competitiveness model in Bagan, Myanmar. From the perspective of this study, this model was the most relevant. All of the connections developed have been retained but a part of the original model, that which linked destination competitiveness attributes to 'Demand condition' category, was eliminated for this paper measures competitiveness from a supply-side perspective, not from the tourists' (demand side).

**Figure 2.9 A model of destination competitiveness for Gondar**



Source: Adapted from Ei Ei Khin et al. (2014)

In the model, six main indicators and set of measurements are identified:

1. **Destination Attraction:** Primary appeal of the destination that makes the place attractiveness to visit. Included in this category are Natural and Cultural attractions.
2. **Tourism superstructures:** The specific need that can enhance the attractiveness of the tourism destination such as Accommodation, Food services, Festivals and Events, Special Activities, Entertainments, Shopping, etc.
3. **General infrastructure:** The basic need for every destination including transportation networks, modes of accessibility, ground transportation, financial services, health services, telecommunication services, and electricity supply.
4. **Destination management:** An important framework that works towards matching destination resources to proper strategic planning thereby enhances the competitiveness of destination. Site management, strategy formulation, environmental conservation, human resource development and marketing campaign are included.
5. **Demand condition:** A motivational factor which can stimulate visitation to a destination. Demand condition in this model is presented as more consistent with the concept Dawyer & Kim (2003). Destination awareness, motivation and tourists' perception about destination are included as measurements.
6. **Destination image:** A special factor for destination competitiveness because the actual visitation largely depends on the tourist attitudes towards destination. Cost and value, ensure of safety and security, crowd of tourist and the local hospitality are involved.

### 3. RESEARCH METHODOLOGY

#### 3.1. THE SETTING

Though many Woredas in the Zone have potential tourism resources, tourism in North Gondar is mainly concentrated in two Woredas, namely Gondar and Debarke. These two Woredas are where most tourism service providers and well identified tourism attractions such as Fasil Castile (a cultural UNESCO world heritage site designated in 1979) and the Semien Mountains National Park (a natural UNESCO world heritage site recognized in 1978) are found. As this study assesses the competitiveness of the zone as an international tourism destination from the suppliers' (service providers') perspective, to focus mainly on tourism stakeholders (hotels, lodges and restaurants; local travel agents, tour guides, government officials, tourism police, university and vocational training center hotel and tourism department lecturers, transport associations, NGOs, Ethiopian airlines) of these two woredas (Gondar and Debarke) was found to be appropriate.

### 3.2 DATA COLLECTION METHOD

Survey method was found to be appropriate data to be collected due to economic and time efficiency. A survey instrument was prepared based on literature review (the model developed by Ei Ei Khin et al., 2014) from the list of factors of tourism destination competitiveness in the way it achieves the objectives of the study. In designing the questionnaire, a five point Likert-type scale was used.

#### 3.2.1 VALIDITY, RELIABILITY and PRE-TEST

Validity issues were resolved considering the fact that the same destination competitiveness factors which were used in this research to measure the competitiveness of North Gondar zone as an international tourism destination were also used to measure competitiveness of Bagan, Myanmar (Ei Ei Khin et al., 2014). Reliability of the resulting data from the survey was subjected to internal consistency measures. When assessing the importance measures of 36 factors, the Cronbach's Alpha was found to be 0.937 regarding the performance measurement of the destination; the Cronbach's Alpha resulted to be 0.878 which in both cases indicated a high level of internal consistency which then means a high degree of reliability

### 3.4 SAMPLING

Once the names of stakeholder organizations, where they were located (Gondar or Debarke) and their number – a total of 74 (56 or 75.68% of the total organizations from Gondar and the rest 18 or 24.32% of the total organizations from Debarke) – was known, the next step was to decide on who to target and how many individuals in each organization (positions of these individuals and in targeted organizations and their number). So, a total of 272 people (186 or 68% of the total population from Gondar and the rest 86 or 31.62% of the total population from Debarke) were identified. The next step was to determine the number of those individuals to be included in the sample which helps to determine the sample size.

Once the size of population (272), the sample size (170) was determined using the formula:

$$n = \frac{N}{1 + N(e)} 2$$

Where:

- n = the sample size
- N = the population size and
- e = the level of precision which is ( $\pm 5\%$ ) Where Confidence Level is 95% and P = .5. (Yamane in Israel, 2013 (original publication in 1992, reviewed in 2013))

The actual sample size, of course, happened to be 162:

$$n = \frac{272}{1 + 272(5\%)} 2 = 162$$

The sample size (162) is about 60% of the total population (272). This also means that we should take 60% of all people in each target organization at both locations (Gondar and Debarke). In this study only those individuals who work for organizations or associations which are highly in contact with tourists on a daily basis or which give highly tourism related services were targeted to be the population of interest. As participants in the survey were individuals with varying levels of experience and expertise on the topic of destination competitiveness, the researcher used his judgment in deciding who needed to be targeted (general managers, members of associations, lecturers of particular departments, etc) in each organization as shown in.

### 3.5 SOURCE OF DATA

In an attempt to attack the problem and achieve the ultimate objective of the research (answer the research questions), both a literature study (as a secondary source of data) and an empirical investigation (as a primary source of data) were undertaken.

### 3.6 DATA ANALYSIS TECHNIQUES

The final results of the survey were analyzed electronically. All the data collected from the respondents was entered to and analyzed on a computer and then tabulated discussed with the help of importance-performance analysis (IPA) grid which uses the mean importance and performance scores from the five-point scale survey and provides a clearer understanding of what factors (attributes) North Gondar zone is more competitive with or where it is less competitive and needs improvement.

In this study, descriptive statistics such as means, mode, median standard deviations, frequency distributions, and percentages are used. Though the numerical data that emerged from the survey and which is shown in the tables that are presented onwards in this study considered the mean value of the response, in order to provide a further insight on the mean values of the responses, the mode, median and standard deviation values

are also presented. All this was conducted with the help of a computerized statistical package, SPSS 16.0.

#### **4. RESEARCH FINDINGS AND DISCUSSION**

##### **4.1 GENERAL INFORMATION ABOUT RESPONDENTS**

From out of 170, majority of respondents 162 (95.3%) were male, (116 or 68.2%), were in the age group of 25-34 years, Followed by (30 or 17.6%) is 35-44 years, (5 or 2.9%) belong to the age group 55-64 years (10 or 5.9%) and (9 or 5.3%) age groups were 45-54 years respectively. The majority of the respondents 85 (50%) were bachelor's degree holders followed by the diploma holders (43 or 25.3%). 1 (0.6 %) respondent had a certificate while 29 (17.1 %) were high school graduates. The rest 12 (7.1%) were above degree. This shows that more than 82.4% of the respondents had diploma and above which in turn shows high educational attainment of participants and shows minimum level of female participation in North Gondar's tourism industry. The majority of the respondents 98 (57.6%) were single where as 70 (41.2%) respondents were married and the rest 2 (1.2%) were widowed.

How long each of the participants had been working in the tourism industry were found most respondents (89 or 52.4%) had 1-5 years of experience in the tourism industry, the second largest number (42 or 24.7%) had longer than 10 years of experience, and the rest 39 (22.9%) respondents had 6-10 years of experience. This shows that almost half (47.6%) of the respondents had at least 6 and above years of experience in the tourism industry.

158 (92.9%) out of 170 respondents saw North Gondar (as a tourism destination) as 'currently very important' for the existence of their organization while 10 (5.9%) and 2 (1.2%) respondents saw the zone's tourism industry as 'of increasing importance' and 'of diminishing importance' respectively, for the existence of their organization which is 'very important' with a mean value of 1.08 and standard deviation 0.32. This shows strong agreement among the respondents that they all believe (with a very small variation) that North Gondar as a tourism destination is really very important for the existence of their organization.

##### **4.2 IMPORTANCE OF FACTORS OF DESTINATION COMPETITIVENESS**

Here, the views of respondents on the importance of a given set of factors which (directly or indirectly) affect the competitiveness of North Gondar zone as an international tourism destination are presented. In total, 36 attributes were identified from literature review (Ei Ei Khin et al 2014). These attributes or factors were then grouped into five categories.

###### **4.2.1 DESTINATION ATTRACTIONS**

There are seven attributes namely, Comfortable climate for tourism, Natural landscape, Wonderful scenery, Cultural and historical attractions, Artistic and architectural design, Traditional art and crafts and Exotic and unique local custom. Views of participants on the importance of these attributes is presented and discussed below:

The majority of respondents believe climate, landscape, Wonderful scenery, Artistic and architectural design, Traditional art and crafts, Exotic and unique local custom is highly important for North Gondar to be competitive in the international tourism market as a tourism destination.

###### **4.2.2 TOURISM SUPERSTRUCTURE**

Under this category, there are eight attributes namely, Variety of accommodation, Quality service in accommodation, Variety of food and beverage services, Quality in food and beverage services, Variety of evening entertainment, Tourism activities, Variety of shopping items and presence of service providers. Views of participants on the importance of these attributes is presented and discussed below:

Respondents believe variety of accommodation, Quality service in accommodation, Quality in food and beverage services, Tourism activities, Variety of shopping items, Presence of service providers are very important factors that could influence the competitiveness of North Gondar zone as a tourism destination in the international market.

###### **4.2.3 GENERAL INFRASTRUCTURE**

Under this category, there are six attributes namely, various modes of transport, Smooth transportation within destination, Banking and financial services, Telecommunication services, Electric supply and Infrastructure to meet visitors needs. Views of participants on the importance of these attributes is presented and discussed below.

Respondents said various modes of transport, Smooth transportation within destination, Banking and financial services, Telecommunication services, Electric supply, infrastructure such as water supply, health facilities are very important factors for the competitiveness of the North Gondar zone as a tourism destination.

###### **4.2.4 DESTINATION MANAGEMENT**

Under this category, there are eleven attributes namely, Cleanliness in destination, Safety and security, Public bathrooms and restrooms, Multilingual signage, Easy access to get destination map/leaflets, Favorable policies to tourists, Cultural heritage preservation, Conservation of local tradition, Environmental conservation, Efficiencies of tourism and hospitality staff and Use of IT in destination. Views of participants on the importance of these attributes is presented and discussed below:

The respondents viewed the attribute Cleanliness in destination, Safety and security, Public bathrooms and restrooms, Multilingual signage, Easy access to get destination map/leaflets, Favorable policies to tourists, Cultural heritage preservation Conservation of local tradition, Environmental conservation, Efficiencies of tourism and hospitality staff use of IT are very important for the competitiveness of the North Gondar zone as an international tourism destination.

#### **4.2.5 DESTINATION IMAGE**

Under this category, there are four attributes namely, overall price in destination, Ensured safety and security, Crowd of tourists and finally, Friendliness of local people. Views of participants on the importance of these attributes is presented and discussed below:

The result shows that overall price in destination, Ensured safety and security, Crowd of tourists, Friendliness of local people, are very important attributes for tourism destination competitiveness in the international market.

### **4.3 PERFORMANCE OF DESTINATION**

This section of the study shows the views of respondents on the performance of North Gondar as an international tourism destination when measured in 36 destination competitiveness attributes which are grouped into five categories. For each attribute (factor), respondents were presented with five response alternatives to choose from: 1= Very low, 2= Low, 3= Normal, 4= High, 5= Very high.

#### **4.3.1 DESTINATION ATTRACTIONS**

There are seven attributes namely, Comfortable climate for tourism, Natural landscape, Wonderful scenery, Cultural and historical attractions, Artistic and architectural design, Traditional art and crafts, and Exotic and unique local custom. Views of participants on the performance of North Gondar as an international destination when measured in these attributes is presented and discussed below:

The participants felt North Gondar zone has Comfortable climate for tourism, amazing natural landscape, wonderful scenery, rich in cultural and historical attractions, good artistic and architectural design, a variety of traditional art and crafts, Exotic and unique local custom so the zone is competitive as international tourism destination.

#### **4.3.2 TOURISM SUPERSTRUCTURE**

Under this category, there are eight attributes namely, Variety of accommodation, Quality service in accommodation, Variety of food and beverage services, Quality services in food and beverage services, Variety of evening entertainment, Tourism activities, Variety of shopping items and Presence of service providers. Views of participants on the performance of North Gondar as an international destination when measured in these attributes is presented and discussed below:

The respondents believe that north Gondar zone is characterized, little variety of accommodation, Quality service in accommodation very low, no or little variety of food and beverage services, Quality services in food and beverage services is very low, no or little variety of evening entertainment, poor in tourism activities, lacking variety of shopping items, limited service providers which make in competitive as international tourism destination.

#### **4.3.3 GENERAL INFRASTRUCTURE**

Under this category, there are six attributes namely various modes of transport, Smooth transportation within destination, Banking and financial services, Telecommunication services, Electric supply and Infrastructure to meet visitors needs. Views of participants on the performance of North Gondar as an international destination when measured in these attributes is presented and discussed below:

The North Gondar zone as per respondents view no or little various modes of transport, there is no Smooth transportation within destination, little Banking and financial services, insufficient Telecommunication services, interrupted electric supply, limited Infrastructure to meet visitors needs, which makes uncompetitive as international tourism destination.

#### **4.3.4 DESTINATION MANAGEMENT**

Under this category, there are eleven attributes namely, Cleanliness in destination, Safety and security, Public bathrooms and restrooms, Multilingual signage, Easy access to get destination map/leaflets, Favorable policies to tourists, Cultural heritage preservation, Conservation of local tradition, Environmental conservation, Efficiencies of tourism and hospitality staff and Use of IT in destination. Views of participants on the performance of North Gondar as an international destination when measured in these attributes is presented and discussed below:

North Gondar as a tourism destination were not clean as required, normal Safety and security, no public bathrooms (restrooms), no multilingual signage, difficult to access to get destination map or leaflets, Favorable policies to tourists, various Cultural heritage but no preservation, little conservation of local tradition, no Environmental conservation, inefficient and non professional staffs in the tourism and hospitality industry, little use of IT in the destination the performance of the zone was rated by the respondents as low, which makes uncompetitive as international tourism destination.



#### 4.3.5 DESTINATION IMAGE

Under this category, there are four attributes namely, overall price in destination, Ensured safety and security, Crowd of tourists and finally, Friendliness of local people. Views of participants on the performance of North Gondar as an international destination when measured in these attributes is presented and discussed below:

North Gondar as an international tourism destination is performing amazing in overall price in destination, normal insured safety and security, crowdedness is not an issue and local peoples very friendly which makes competitive as international tourism destination.

#### 4.4 IMPORTANCE- PERFORMANCE ANALYSIS (IPA)

According to the result there is a need to put more effort on Variety of accommodation, Quality service in accommodation, Variety of food and beverage services, Quality services in food and beverage services, Presence of service providers, Various modes of transport, Smooth transportation within destination, Telecommunication services, Electric supply, Infrastructure to meet visitors needs, Cleanliness in destination, Public bathrooms and restrooms, Easy access to get destination map/leaflets, Favorable policies to tourists, Cultural heritage preservation, Conservation of local tradition, Environmental conservation, Efficiencies of tourism and hospitality staff, Use of IT in destination and Ensured safety and security.

North Gondar is more competitive in Comfortable climate for tourism, Natural landscape, Wonderful scenery, Cultural and historical attractions, Banking and financial services, Safety and security and Friendliness of local people.

North Gondar is relatively weak in Variety of evening entertainment, Tourism activities, Variety of shopping items, Overall price in destination and Multilingual signage, however, these are unimportant according to respondents and referred as low priority attributes.

North Gondar could perform well on Artistic and architectural design, Crowd of tourists, Exotic and unique local custom, Traditional art and crafts, but it is thought to be less important. Any further efforts on these attributes may be waste of effort.

#### 5. CONCLUSION

It is found that all the 36 attributes, except for 'Variety of evening entertainment', were seen by the respondents '**very important**' – for the competitiveness of North Gondar in the international tourism market – having a mean value of 4.65 and above (ranging from 'Crowded of tourists' (4.65) to 'Safety and security' (4.96)). The values of the standard deviations for all 36 attributes ranged from the highest (0.72) to the lowest (0.2) which are all between zero and one (between 0 and 1) and are considered to show not much difference between respondents' views on the importance of the attributes for the competitiveness of the zone. But, even 'Variety of evening entertainment' was viewed as 'important' having a mean value of 4.33 –just to say that it was not seen as 'very important'.

However, as far as performance is concerned, the views of the respondents is different from that of importance of attributes not in all attributes was the zone considered to have performed well as an international tourism destination. North Gondar was viewed by the respondents as having a 'high' performance in attributes such as 'Comfortable climate for tourism', 'Natural landscape', 'Wonderful scenery', 'Cultural and historical attractions', 'Artistic and architectural design', 'Traditional art and crafts' and 'Exotic and unique local custom' of 'Destination attractions category' which are all endowed natural and cultural attractions; and 'Crowd of tourists' and 'Friendliness of local people' of 'Destination image' category. In other words, the destination is competitive in all the seven attributes of 'Destination attractions' and only two (of the four) attributes of 'destination image' categories. This leaves us with the conclusion that from the 36 attributes the respondents viewed as having high importance for the competitiveness of the zone; North Gondar is competitive in only 9 of them.

The mean values for all the above 9 attributes ranged from the highest 4.88 of 'Natural landscape' to the lowest 3.91 of 'Traditional art and crafts'. The views of the respondents have very small variation as the values of the standard deviations for these attributes ranged from 0.38 (of 'Natural landscape') to 0.91 ('Traditional art and crafts') which is all between zero (0) and one (1).

Other attributes in which the zone was seen as having a 'normal' (neither 'low' nor 'high') performance included 'Safety and security' of 'Destination management' category (with a mean value of 3.29), 'Banking and financial services' of 'General infrastructure' category (with a mean value of 2.93) and 'Overall price in destination' of 'Destination image' category (with a mean value of 2.73). The standard deviation value for these 3 attributes ranged from 0.77 of 'Banking and financial services' to 0.94 of 'Overall price in destination' which is between small (between 0 and 1) and suggesting a small variation among the views of respondents.

In the rest 24 attributes of destination competitiveness, North Gondar was viewed by the respondents as having a weak performance including 'Variety of accommodation', 'Quality service in accommodation', 'Variety of food and beverage services', 'Quality services in food and beverage services', 'Variety of evening

entertainment', 'Tourism activities', 'Variety of shopping items' and 'Presence of service providers' of 'Tourism superstructure' category; 'Various modes of transport', 'Smooth transportation within destination', 'Telecommunication services', 'Electric supply' and 'Infrastructure to meet visitors needs' of 'General infrastructure' category; 'Cleanliness in destination', 'Public bathrooms and restrooms', 'Multilingual signage', 'Easy access to get destination map/leaflets', 'Favorable policies to tourists', 'Cultural heritage preservation', 'Conservation of local tradition' 'Environmental conservation', 'Efficiencies of tourism and hospitality staff' and 'Use of IT in destination' of 'Destination management' category; and finally, 'Ensured safety and security' of 'Destination image' category. The mean values of all these attributes ranged from the smallest 1.75 of 'Multilingual signage' (in 'Destination management' category) to the highest 2.45 of 'Telecommunication services' (in 'General infrastructure' category) which are all in range of 'low' performance. The standard deviation values of all these 24 attributes ranged from the highest 0.74 of 'Various modes of transport' in the 'General infrastructure' category to the lowest 0.46 of 'Efficiencies of tourism and hospitality staff' in 'Destination management' category which all suggest that there was not much difference between the views of respondents as these values are between zero (0) and one (1).

But, when it comes to prioritizing attributes on the IPA grid, the picture is a bit different from what has previously been concluded. As this method puts the attributes into only a 'high-low' matrix from a total mean value of 'importance' and 'performance' of attributes and there are no other alternatives such as 'very low', 'normal' or 'very high', what was seen as having a 'high' importance might fall into a quadrant which suggests 'low' importance. However, as this analysis gives responsible bodies a quick picture of priorities all in an easily applicable format; it is helpful for efficient allocation of resources.

Therefore, those areas which need immediate attention and allocation of resources include: 'Variety of accommodation', 'Quality service in accommodation', 'Variety of food and beverage services', 'Quality services in food and beverage services' and 'Presence of service providers' of the 'Tourism superstructure' category; 'Various modes of transport', 'Smooth transportation within destination', 'Telecommunication services', 'Electric supply' and 'Infrastructure to meet visitors needs' of the 'General infrastructure' category; 'Cleanliness in destination', 'Public bathrooms and restrooms', 'Easy access to get destination map/leaflets', 'Favorable policies to tourists', 'Cultural heritage preservation', 'Conservation of local tradition', 'Environmental conservation', 'Efficiencies of tourism and hospitality staff' and 'Use of IT in destination' of the 'Destination management' category; and finally 'Ensured safety and security' of the 'Destination image' category.

North Gondar as a tourism destination is suggested to keep up the good work in areas such as 'Comfortable climate for tourism', 'Natural landscape', 'Wonderful scenery', 'Cultural and historical attractions' of the 'Destination attractions' category which are all either endowed naturally or inherited. Other areas also include 'Banking and financial services' from 'general infrastructure' category; 'Safety and security' from 'Destination management' category and lastly, 'Friendliness of local people' from 'Destination image' category.

The rest, about seven (7), attributes are not even worth mentioning as they fall into either 'low importance', 'low performance' quadrant or 'low importance'-'high performance' quadrant.

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**Table 3.1 Reliability Statistics (for Importance)**

Cronbach's Alpha	Cronbach's Alpha Based on Standardized Items	N of Items
.937	.951	36

**Table 3.2 Reliability Statistics (for Performance)**

Cronbach's Alpha	Cronbach's Alpha Based on Standardized Items	N of Items
.878	.891	36

**Table 4.1 General information of respondents N=170**

		Freq	%			Freq	%
<b>Gender</b>	Male	162	95.3%	<b>Type of organization</b>	Accommodation facility	26	15.3%
	Female	8	4.7%		Airlines	1	.6%
<b>Age</b>	18-24	9	5.3%		Distribution channel	7	4.1%
	25-34	116	68.2%		Educational center	18	10.6%
	35-44	30	17.6%		Government tourism office	3	1.8%
	45-54	10	5.9%		Ground transport association	24	14.1%
	55-64	5	2.9%		NGO	3	1.8%
	age 65 or older				Religious center	2	1.2%
<b>Education</b>	Less than high school				Restaurant	2	1.2%
	High school	29	17.1%		Tour guides association	75	44.1%
	Certificate	1	.6%		Tourism police association	9	5.3%
	Diploma	43	25.3%				
	Bachelor's degree	85	50.0%				
	Above degree	12	7.1%				
<b>Marital status</b>	Single	98	57.6%				
	Married	70	41.2%				
	Widowed	2	1.2%				
	Divorced						
	Separated						

Note: areas with no values are shaded in light gray

**Table 4.2 views of respondents on the importance of destination's tourism for the existence of their organization N=170**

	Response alternatives	Freq	%	Mean	Median	Mode	St dv*
<b>Current importance of destination's tourism for organizations</b>	Very important	158	92.9%	1.08	1.00	1.00	.32
	Of increasing importance	10	5.9%				
	Of diminishing importance	2	1.2%				
	Not important						
<b>Future importance of destination's tourism for organizations</b>	Very important	157	92.4%	1.08	1.00	1.00	.30
	Of increasing importance	12	7.1%				
	Of diminishing importance	1	.6%				
	Not important						

Note: St dv\*=Standard deviation; light gray shaded areas show no values.

**Table 4.4 Results on the respondents' view of the importance of factors of destination competitiveness – DESTINATION ATTRACTIONS N=170**

No	Factors/Attributes	Importance										Mean	Median	Mode	Sd*
		1*		2*		3*		4*		5*					
		freq	%	freq	%	freq	%	freq	%	freq	%				
1	Comfortable climate for tourism							11	6.5	159	93.5	4.94	5.00	5.00	.25
2	Natural landscape				2	1.2	5	2.9	163	95.9	4.95	5.00	5.00	.27	
3	Wonderful scenery				1	.6	8	4.7	161	94.7	4.94	5.00	5.00	.26	
4	Cultural and historical attractions				2	1.2	19	11.2	149	87.6	4.86	5.00	5.00	.38	
5	Artistic and architectural design				1	.6	49	28.8	120	70.6	4.70	5.00	5.00	.47	
6	Traditional art and crafts				3	1.8	45	26.5	122	71.8	4.70	5.00	5.00	.50	
7	Exotic and unique local custom			1	.6	4	2.4	33	19.4	132	77.6	4.74	5.00	5.00	.53

**Note:**

- All the areas shaded in gray show all the response alternatives not chosen by respondents.
- 1\*= Very unimportant, 2\*= Unimportant, 3\*= Neutral, 4\*= Important, 5\*= Very important
- Sd\*=Standard deviation

**Table 4.5 Results on the respondents' view of the importance of factors of destination competitiveness – TOURISM SUPERSTRUCTURE N=170**

No	Factors/Attributes	Importance										Mean	Median	Mode	Sd*
		1*		2*		3*		4*		5*					
		freq	%	freq	%	freq	%	freq	%	freq	%				
1	Variety of accommodation			1	.6	1	.6	10	5.9	158	92.9	4.91	5.00	5.00	.36
2	Quality service in accommodation			1	.6			5	2.9	164	96.5	4.95	5.00	5.00	.28
3	Variety of food and beverage services			1	.6	1	.6	10	5.9	158	92.9	4.91	5.00	5.00	.36
4	Quality services in food and beverage services			1	.6			6	3.5	163	95.9	4.95	5.00	5.00	.29
5	Variety of evening entertainment	1	.6	1	.6	3	1.8	101	59.4	64	37.6	4.33	4.00	4.00	.60
6	Tourism activities					1	.6	57	33.5	112	65.9	4.65	5.00	5.00	.49
7	Variety of shopping items			1	.6			30	17.6	139	81.8	4.81	5.00	5.00	.44
8	Presence of service providers					1	.6	11	6.5	158	92.9	4.92	5.00	5.00	.29

**Note:**

- All the areas shaded in gray show all the response alternatives not chosen by respondents.
- 1\*= Very unimportant, 2\*= Unimportant, 3\*= Neutral, 4\*= Important, 5\*= Very important
- Sd\*=Standard deviation

**Table 4.6 Results on the respondents' view of the importance of factors of destination competitiveness – GENERAL INFRASTRUCTURE N=170**

No	Factors/Attributes	Importance										Mean	Median	Mode	Sd*
		1*		2*		3*		4*		5*					
		freq	%	freq	%	freq	%	freq	%	freq	%				
1	Various modes of transport					2	1.2	14	8.2	154	90.6	4.89	5.00	5.00	.34
2	Smooth transportation within destination					3	1.8	15	8.8	152	89.4	4.88	5.00	5.00	.38
3	Banking and financial services					1	.6	9	5.3	160	94.1	4.94	5.00	5.00	.27
4	Telecommunication services					2	1.2	14	8.2	154	90.6	4.89	5.00	5.00	.34
5	Electric supply					2	1.2	7	4.1	161	94.7	4.94	5.00	5.00	.29
6	Infrastructure to meet visitors needs					1	.6	9	5.3	160	94.1	4.94	5.00	5.00	.27

**Note:**

- All the areas shaded in gray show all the response alternatives not chosen by respondents.
- 1\*= Very unimportant, 2\*= Unimportant, 3\*= Neutral, 4\*= Important, 5\*= Very important
- Sd\*=Standard deviation

**Table 4.7 Results on the respondents' view of the importance of factors of destination competitiveness – DESTINATION MANAGEMENT N=170**

No	Factors/Attributes	Importance										Mean	Median	Mode	Sd*
		1*		2*		3*		4*		5*					
		freq	%	freq	%	freq	%	freq	%	freq	%				
1	Cleanliness in destination			2	1.2	1	.6	9	5.3	158	92.9	4.90	5.00	5.00	.42
2	Safety and security					1	.6	4	2.4	165	97.1	4.96	5.00	5.00	.21
3	Public bathrooms and restrooms			1	.6			12	7.1	157	92.4	4.91	5.00	5.00	.34
4	Multilingual signage					3	1.8	32	18.8	135	79.4	4.78	5.00	5.00	.46
5	Easy access to get destination map/leaflets			1	.6	1	.6	16	9.4	152	89.4	4.88	5.00	5.00	.40
6	Favorable policies to tourists					2	1.2	13	7.6	155	91.2	4.90	5.00	5.00	.34
7	Cultural heritage preservation					1	.6	6	3.5	163	95.9	4.95	5.00	5.00	.24
8	Conservation of local tradition					1	.6	8	4.7	161	94.7	4.94	5.00	5.00	.26
9	Environmental conservation			1	.6	1	.6	7	4.1	161	94.7	4.93	5.00	5.00	.34
10	Efficiencies of tourism and hospitality staff			1	.6			8	4.7	161	94.7	4.94	5.00	5.00	.31
11	Use of IT in destination			1	.6			15	8.8	154	90.6	4.89	5.00	5.00	.36

**Note:**

- All the areas shaded in gray show all the response alternatives not chosen by respondents.
- 1\*= **Very unimportant**, 2\*= **Unimportant**, 3\*= **Neutral**, 4\*= **Important**, 5\*= **Very important**
- Sd\*=**Standard deviation**

**Table 4.8 Results on the respondents' view of the importance of factors of destination competitiveness – DESTINATION IMAGE N=170**

No	Factors/Attributes	Importance										Mean	Median	Mode	Sd*
		1*		2*		3*		4*		5*					
		freq	%	freq	%	freq	%	freq	%	freq	%				
1	Overall price in destination					4	2.4	21	12.4	145	85.3	4.83	5.00	5.00	.44
2	Ensured safety and security							7	4.1	163	95.9	4.96	5.00	5.00	.20
3	Crowd of tourists			4	2.4	12	7.1	24	14.1	130	76.5	4.65	5.00	5.00	.72
4	Friendliness of local people					2	1.2	8	4.7	160	94.1	4.93	5.00	5.00	.30

**Note:**

- All the areas shaded in gray show all the response alternatives not chosen by respondents.
- 1\*= **Very unimportant**, 2\*= **Unimportant**, 3\*= **Neutral**, 4\*= **Important**, 5\*= **Very important**
- Sd\*=**Standard deviation**

**Table 4.10 Results on the respondents' view of the performance of destination (North Gondar's competitiveness) when measured in competitiveness attributes – DESTINATION ATTRACTIONS N=170**

No	Factors/Attributes	Performance										Mean	Median	Mode	Sd*
		1*		2*		3*		4*		5*					
		freq	%	freq	%	freq	%	freq	%	freq	%				
1	Comfortable climate for tourism			3	1.8	14	8.2	45	26.5	108	63.5	4.52	5.00	5.00	.72
2	Natural landscape					3	1.8	15	8.8	152	89.4	4.88	5.00	5.00	.38
3	Wonderful scenery					8	4.7	9	5.3	153	90.0	4.85	5.00	5.00	.47
4	Cultural and historical attractions			3	1.8	6	3.5	41	24.1	120	70.6	4.64	5.00	5.00	.64
5	Artistic and architectural design	1	.6	5	2.9	15	8.8	46	27.1	103	60.6	4.44	5.00	5.00	.82
6	Traditional art and crafts	1	.6	11	6.5	39	22.9	71	41.8	48	28.2	3.91	4.00	4.00	.91
7	Exotic and unique local custom	1	.6	6	3.5	12	7.1	55	32.4	96	56.5	4.41	5.00	5.00	.82

**Note:**

- All the areas shaded in gray show all the response alternatives not chosen by respondents.
- 1\*= **Very low**, 2\*= **Low**, 3\*= **Normal**, 4\*= **High**, 5\*= **Very high**
- Sd\*=**Standard deviation**

**Table 4.11 Results on the respondents' view of the performance of destination (North Gondar's competitiveness) when measured in competitiveness attributes – TOURISM SUPERSTRUCTURE**

**N=170**

No	Factors/Attributes	Performance										Mean	Median	Mode	Sd*
		1*		2*		3*		4*		5*					
		freq	%	freq	%	freq	%	freq	%	freq	%				
1	Variety of accommodation	14	8.2	134	78.8	15	8.8	5	2.9	2	1.2	2.10	2.00	2.00	.62
2	Quality service in accommodation	18	10.6	135	79.4	13	7.6	3	1.8	1	.6	2.02	2.00	2.00	.55
3	Variety of food and beverage services	26	15.3	121	71.2	17	10.0	6	3.5			2.02	2.00	2.00	.63
4	Quality services in food and beverage services	27	15.9	125	73.5	15	8.8	2	1.2	1	.6	1.97	2.00	2.00	.59
5	Variety of evening entertainment	23	13.5	112	65.9	26	15.3	6	3.5	3	1.8	2.14	2.00	2.00	.76
6	Tourism activities	16	9.4	130	76.5	16	9.4	5	2.9	3	1.8	2.11	2.00	2.00	.67
7	Variety of shopping items	19	11.2	128	75.3	16	9.4	3	1.8	4	2.4	2.09	2.00	2.00	.70
8	Presence of service providers	14	8.2	120	70.6	29	17.1	4	2.4	3	1.8	2.19	2.00	2.00	.69

**Note:**

- All the areas shaded in gray show all the response alternatives not chosen by respondents.
- 1\*= Very low, 2\*= Low, 3\*= Normal, 4\*= High, 5\*= Very high
- Sd\*=Standard deviation

**Table 4.12 Results on the respondents' view of the performance of destination (North Gondar's competitiveness) when measured in competitiveness attributes – GENERAL INFRASTRUCTURE N=170**

No	Factors/Attributes	Performance										Mean	Median	Mode	Sd*
		1*		2*		3*		4*		5*					
		freq	%	freq	%	freq	%	freq	%	freq	%				
1	Various modes of transport	25	14.7	115	67.6	22	12.9	5	2.9	3	1.8	2.09	2.00	2.00	.74
2	Smooth transportation within destination	24	14.1	109	64.1	31	18.2	3	1.8	3	1.8	2.13	2.00	2.00	.73
3	Banking and financial services	7	4.1	27	15.9	115	67.6	13	7.6	8	4.7	2.93	3.00	3.00	.77
4	Telecommunication services	12	7.1	78	45.9	75	44.1	2	1.2	3	1.8	2.45	2.00	2.00	.72
5	Electric supply	21	12.4	128	75.3	18	10.6	1	.6	2	1.2	2.03	2.00	2.00	.60
6	Infrastructure to meet visitors needs	35	20.6	120	70.6	10	5.9	3	1.8	2	1.2	1.92	2.00	2.00	.66

**Note:**

- 1\*= Very low, 2\*= Low, 3\*= Normal, 4\*= High, 5\*= Very high
- Sd\*=Standard deviation

**Table 4.12 Results on the respondents' view of the performance of destination (North Gondar's competitiveness) when measured in competitiveness attributes – GENERAL INFRASTRUCTURE N=170**

No	Factors/Attributes	Performance										Mean	Median	Mode	Sd*
		1*		2*		3*		4*		5*					
		freq	%	freq	%	freq	%	freq	%	freq	%				
1	Various modes of transport	25	14.7	115	67.6	22	12.9	5	2.9	3	1.8	2.09	2.00	2.00	.74
2	Smooth transportation within destination	24	14.1	109	64.1	31	18.2	3	1.8	3	1.8	2.13	2.00	2.00	.73
3	Banking and financial services	7	4.1	27	15.9	115	67.6	13	7.6	8	4.7	2.93	3.00	3.00	.77
4	Telecommunication services	12	7.1	78	45.9	75	44.1	2	1.2	3	1.8	2.45	2.00	2.00	.72
5	Electric supply	21	12.4	128	75.3	18	10.6	1	.6	2	1.2	2.03	2.00	2.00	.60
6	Infrastructure to meet visitors needs	35	20.6	120	70.6	10	5.9	3	1.8	2	1.2	1.92	2.00	2.00	.66

**Note:**

- 1\*= Very low, 2\*= Low, 3\*= Normal, 4\*= High, 5\*= Very high
- Sd\*=Standard deviation

**Table 4.13 Results on the respondents' view of the performance of destination (North Gondar's competitiveness) when measured in competitiveness attributes – DESTINATION MANAGEMENT N=170**

No	Factors/Attributes	Performance										Mean	Median	Mode	Sd*
		1*		2*		3*		4*		5*					
		freq	%	freq	%	freq	%	freq	%	freq	%				
1	Cleanliness in destination	37	21.8	113	66.5	16	9.4	2	1.2	2	1.2	1.94	2.00	2.00	.68
2	Safety and security	5	2.9	16	9.4	84	49.4	54	31.8	11	6.5	3.29	3.00	3.00	.84
3	Public bathrooms and restrooms	54	31.8	103	60.6	9	5.3	4	2.4			1.78	2.00	2.00	.65
4	Multilingual signage	51	30.0	110	64.7	9	5.3					1.75	2.00	2.00	.54
5	Easy access to get destination map/leaflets	21	12.4	133	78.2	15	8.8			1	.6	1.98	2.00	2.00	.52
6	Favorable policies to tourists	20	11.8	92	54.1	49	28.8	6	3.5	3	1.8	2.29	2.00	2.00	.79
7	Cultural heritage preservation	19	11.2	125	73.5	20	11.8	5	2.9	1	.6	2.08	2.00	2.00	.63
8	Conservation of local tradition	36	21.2	105	61.8	24	14.1	4	2.4	1	.6	1.99	2.00	2.00	.71
9	Environmental conservation	20	11.8	125	73.5	23	13.5	1	.6	1	.6	2.05	2.00	2.00	.57
10	Efficiencies of tourism and hospitality staff	11	6.5	137	80.6	21	12.4	1	.6			2.07	2.00	2.00	.46
11	Use of IT in destination	32	18.8	126	74.1	11	6.5	1	.6			1.89	2.00	2.00	.52

**Note:**

- All the areas shaded in gray show all the response alternatives not chosen by respondents.
- 1\*= Very low, 2\*= Low, 3\*= Normal, 4\*= High, 5\*= Very high
- Sd\*=Standard deviation



**Table 4.14 Results on the respondents' view of the performance of destination (North Gondar's competitiveness) when measured in competitiveness attributes – DESTINATION IMAGE N=170**

No	Factors/Attributes	Performance										Mean	Median	Mode	Sd*
		1*		2*		3*		4*		5*					
		freq	%	freq	%	freq	%	freq	%	freq	%				
1	Overall price in destination	4	2.4	87	51.2	37	21.8	36	21.2	6	3.5	2.72	2.00	2.00	.94
2	Ensured safety and security	10	5.9	108	63.5	41	24.1	7	4.1	4	2.4	2.34	2.00	2.00	.75
3	Crowd of tourists	4	2.4	3	1.8	11	6.5	116	68.2	36	21.2	4.04	4.00	4.00	.75
4	Friendliness of local people	1	.6	3	1.8	10	5.9	77	45.3	79	46.5	4.35	4.00	5.00	.72

**Note:**

- 1\* = Very low, 2\* = Low, 3\* = Normal, 4\* = High, 5\* = Very high
- Sd\* = Standard deviation

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