

EAST AFRICAN COMMUNITY  
EAST AFRICAN LEGISLATIVE ASSEMBLY



LAI D ON TABLE  
ON 02/10/2019  
PCA

COMMITTEE ON AGRICULTURE, TOURISM AND NATURAL RESOURCES

REPORT OF THE OVERSIGHT ACTIVITY ON THE PERFORMANCE OF THE  
TOURISM SECTOR IN THE REGION

9<sup>TH</sup> TO 12<sup>TH</sup> SEPTEMBER 2019

EAC PARTNER STATES

THE NATIONAL ASSEMBLY  
PAPERS LAID

DATE: 07 NOV 2019 DAY: THURSDAY

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October 2, 2019

## **LISIT OF ABBREVIATIONS**

<b>ATNR</b>	-Agriculture Tourism and Natural Resources
<b>CEO</b>	-Chief Executive Officer
<b>CITES</b>	-Conservation on International Trade in Endangered Species
<b>EAC</b>	-East African Community
<b>GDP</b>	-Gross Domestic Product
<b>ITB</b>	-International Tourism Berlin
<b>JKIA</b>	-Jomo Kenyatta International Airport
<b>KUC</b>	-Kenya Utalii College
<b>MICE</b>	-Meetings, Incentives, Conferences and Exhibitions
<b>MSMEs</b>	-Macro, Small and Medium Enterprises
<b>NTP</b>	-National Tourism Policy
<b>NTO</b>	-Natural Tourism Office
<b>RDB</b>	-Rwanda Development Board
<b>RECs</b>	-Regional Economic Communities
<b>TCT</b>	-Tourism Confederation of Tanzania
<b>UGX</b>	-Ugandan Shilling
<b>USD</b>	-United States Dollars
<b>UNESCO</b>	-United Nations Educational, Scientific and Cultural Organization
<b>WCS</b>	-Wildlife Conservation Society
<b>WTM</b>	-World Travel Market

## 1.0 INTRODUCTION

Pursuant to Article 115 of the Treaty for the Establishment of the East African Community (EAC), Partner States undertook to develop a collective and coordinated approach to the promotion and marketing of quality tourism into and within the Community. To this end, the Partner States undertook to coordinate the policies in the tourism industry and to establish a framework of co-operation in the sector that will ensure equitable distribution of benefits. Partner States agreed to establish a common code of conduct for private and public tour and travel operators, standardize hotel classifications and harmonise the professional standards of agents in the tourism and travel industry within the Community. Also, Partner States undertook to develop a regional strategy for tourism promotion whereby individual efforts are reinforced by regional actions.

In efforts to implement Article 115 of the Treaty, the EAC has managed to undertake the following:

- a. Development and implementation of classification criteria for tourism accommodation establishment and restaurants;
- b. Joint tourism promotion in international trade fairs: World Travel Market (WTM) and International Tourism Berlin (ITB);
- c. Single tourist visa and use of National IDs as travel documents (Republics of Kenya, Rwanda and Uganda);
- d. Strategy to combat poaching and illegal trade and trafficking of wildlife products;
- e. Preparation of the Draft Regional Tourism Marketing Strategy; and
- f. Development of Tourism and Wildlife Management Protocol. The Protocol is still under negotiation by the Partner States.

The Draft Tourism Marketing Strategy, 2019 states that the tourism sector in the EAC region has been growing over the years, although at varying rates in each of the Partner States. EAC Tourism arrivals have increased from 3.5 million in 2006 to 5.7 million in

2017. However, this is still substantially low given that it represents only 8.6% of the Africa Market share and 0.3% of the global market share. Tourism contributed to the GDP of EAC Partner states by an average of 8.8% in 2017. The percentage contribution was higher than the average in Rwanda (12.7), Kenya (9.7) and Tanzania (9.0). Tourism contributes an average of 18.8% to EAC total exports, although the percentage contribution was higher than the average in Rwanda (30.5%) and Tanzania (26%). In terms of employment, tourism contributes an average of 7.8% to total employment in the EAC translating to 3.25 million jobs (1.27 million direct and 1.98 million indirect). Tourism is one of the six pillars of the EAC Vision 2050 which projects that the number of jobs directly and indirectly will increase from 1.7 million in 2008 estimates to 2.3 million by 2025.

**Table 1: Economic significance of tourism in EAC (GDP & Export Earnings)**

Partner State	Total contribution to GDP (%)	Total contribution to Export Earnings (%)
Burundi	5.1	1.5
Kenya	9.7	18.1
Rwanda	12.7	30.5
South Sudan	Data not available	
Tanzania	9.0	26.0
Uganda	7.3	17.9
Average for five Partner States	8.8	18.8

EAC Secretariat presentation to the Committee on ATNR (23<sup>rd</sup> September, 2019)

**Table 2: Economic significance of tourism in EAC (Employment)**

Partner State	Direct Employment	Indirect Employment	Total	Total % contribution to employment
Burundi	41, 500	49,000	90,500	4.4
Kenya	429,500	707,500	1,137,000	9.0
Rwanda	132,000	201,500	333,500	11.1
South Sudan	Data not available			
Tanzania	446,000	646,500	1,092,500	8.2
Uganda	229,000	376,500	605,500	6.3
Total	1,278,000	1,981,000	3,259,000	The average for 5 Partner States is 7.8

EAC Secretariat: presentation to the Committee on ATNR (23<sup>rd</sup> September, 2019)

The Draft Tourism Marketing Strategy explain further that despite the steady growth of the tourism sector in EAC and Partner States over the years, the sector has not fully realised its full potential. This is attributed to a number of challenges which include: limited product diversification; a weak regional policy and institutional framework; unfavourable business environment; insecurity; poor infrastructure; inadequacies in the marketing and promotion programmes at national level; and limited coordination of Partner States marketing efforts at the EAC level. Therefore, in order for the EAC to harness its tourism potential, the region and Partner States have to implement key strategic actions to enhance their competitiveness and position the EAC region as the preferred sustainable tourist destination in Africa.

## **2.0 BACKGROUND INFORMATION**

One of the responsibilities of the Committee on Agriculture, Tourism and Natural Resources (ATNR) is to undertake oversight activities on the implementation of programs and projects in the tourism and wildlife sectors.

Tourism is one of the key sectors for the economic development of the East African Community. Partner States are endowed with many tourist attractions including beautiful beaches, national parks, rich flora and fauna, historical sites, and cultural activities which, if developed, will increase the number of tourists and tourist activities and increase its contribution to the economic development of the Community.

It is against that background that the Committee on ATNR undertook oversight activity to assess the development and challenges facing tourism sector in the Community. The report of this activity enables the East African Legislative Assembly to debate on tourism sector and make appropriate recommendations to the Council of Ministers. Partner States and to other stakeholders.

## **3.0 OBJECTIVE**

The objective of this activity was to assess the development and challenges facing tourism sector in the East African Community and the level of cooperation among the Partner States.

## **4.0 METHODOLOGY**

The Committee conducted interactive meetings in the Partner States with government officials and key stakeholders in the sector. In order to cover all six Partner States in the four days allocated, the Committee was divided into three teams, each team covering two Partner States. Government officials made presentations on the development and challenges facing the sector in their respective Partner States. Stakeholders were given opportunity to discuss issues relating to the tourism sector in their Partner States and in the Community

## 5.0 REPORTS FROM PARTNER STATES

### 5.1 THE REPUBLIC OF BURUNDI

#### i. Overview of Tourism Sector in Burundi

According to the presentation made during this activity, tourism is relatively a small sector in Burundi accounting for only 3% of the country's GDP and 2.0% of total employment. The number of tourist and revenue trends increased slightly from 2004, when 133,000 tourists visited Burundi, generating USD 1.8 million and peaked in 2006 with 214,000 visitors, generating USD 1.6 million, before dropping in 2007. Tourism therefore remains a small and undeveloped economic sector in Burundi.

Tourist attractions in the Republic of Burundi include 126 tourist sites of which 57% are tangible cultural heritage and 32% are natural heritage. The weather is favorable for tourists throughout the year. The Burundi culture is rich, (Burundi drums). Burundi is also famous for its cuisine (Mukeke) which represents African culinary culture. Areas to be developed for tourism in Burundi include:

- a. Infrastructural development in all provinces;
- b. Classification of hotel and categorization of accommodation in Burundi;
- c. Lake Tanganyika Coastal development project (on-going project);
- d. Rehabilitation of tourist attractions:
  - i. King's Palace in Muramvya Province;
  - ii. Hot spring of Mugara in Rumonge Province;
  - iii. Independence square in Bujumbura;
  - iv. Mausoleum of Prince Louis Rwagasore (Hero of Burundi independence);
  - v. Source of Nile river and Pyramid in Bururi Province;
  - vi. Gishora drums Sanctuary in Gitega Province;
  - vii. National Museum of Gitega;
  - viii. Monument des matures de la démocratie ;
  - ix. Public garden;
  - x. Monument of Burundi Unity;
  - xi. Buhonga catholic church;
  - xii. Muyaga catholic church;

- xiii. Karera waterfalls;
- xiv. Ndadaye Mechior International Airport; and
- xv. Camping Lodge in Ruvubu National Park (on-going construction), Kibira National Park, Rusizi National Park, Kigwena natural reserve, and Vyanda National protected area.

Other tourist activities developed in the Republic of Burundi include festivals and events organized in the region for example the Magical Kenya travel expo and motorcycle rallies, organization of domestic package to promote domestic and inbound tourism, and training activities organized by National Tourist Office to empower direct employees in the sector.

**Table 3: Number of tourists in the Republic of Burundi in 2018**

Burundi	Kenya	Uganda	Rwanda	RSS	URT	Others
233,496	5,320	5,312	24,864	196	29,951	116,799

Presentation by the Government of Burundi to the Committee during this activity

Burundi promotes domestic tourism through organization of rallies, annual communal events which take place in all districts, trips organized by different tour operators and local Christmas market exhibitions which sell arts and crafts.

## ii. Strategies to Develop the Tourism Sector in Burundi

The following are the strategies to develop tourism sector in the Republic of Burundi:

- a. Adoption of the National Strategy for Sustainable Tourism Development, 2011 and its action plan for 10 years;
- b. The use of Burundi National Development Plan, 2018-2027;
- c. Tourism sector is regulated by a Presidential Decree No. 100/197 of 5<sup>th</sup> July 2012 on the Regulation of Tourism in Burundi which provides direction in the management of the tourism sector in Burundi;
- d. Participation in different exhibitions organized in the East Africa region;

- e. Improvement of service provided in hotels through classification of hotel in accordance with EAC standards;
- f. Rehabilitation of tourist and historical sites;
- g. Improvement of Burundi Port situated at the Lake Tanganyika;
- h. Park restocking project at Ruvubu National Park; and
- i. Burundi has five high schools with hospitality and tourism courses, where 1,660 students (31% men and 69% women) were enrolled. It also has two universities with 380 students (43% men and 57% of women) enrolled in tourism related courses.

### **iii. Challenges Facing the Tourism Sector in the Republic of Burundi**

The following are some of the challenges facing tourism sector in Burundi:

- a. Burundi has large and varied tourism attractions but they are not well developed;
- b. Inadequacy of high-quality hotels coupled with unskilled human resource;
- c. Classification of hotel in accordance to the EAC standard is not well implemented;
- d. Burundi is yet to join the EAC Single Tourist Visa;
- e. Air transport to Burundi is very expensive compared to other countries in the region;
- f. Poor facilities and infrastructure for cross border movement to Burundi;
- g. Burundi is one hour behind some of the EAC Partner States and the border posts are open for fewer hours. This affects the travel schedule in the region;
- h. Lack of training institutions in the tourism sector;
- i. The VAT paid in tourism sector is high; and
- j. Lack of national tourism promotion events.

## **5.2 THE REPUBLIC OF KENYA**

### **i. Development of the Tourism Sector in Kenya**

The Kenyan strategic areas for tourism development focus on developing tourism resources, tourism markets, production strategy, infrastructure strategy which include

safety, investment promotion strategy, marketing strategic direction, and human resource development strategy.

The Government of Kenya developed infrastructure to support the tourism sector such as Jomo Kenyatta International Airport, Standard Gauge Railway, Kenyatta International Convention Centre, Circuit Priority Roads, Mombasa Waterfronts, Bomas of Kenya, Kaya Forest for Cultural Conservation, National Parks and Reserves.

The Republic of Kenya is promoting tourism through a number of strategies and activities which include:

- a. Development of tourism policies that support expansion of the tourism sector,
- b. Tourism Fund to support tourism industry in Kenya;
- c. Provision of Charter Incentives to enhance travel,
- d. Improvement of tourism infrastructure;
- e. Availability of training institutions;
- f. Setting of Tourism Police Units;
- g. Airports and Airstrips; and
- h. Development of cultural tourism.

Kenya is diversifying its tourism industry offer by redefining the safari to include walks, adventure activities, volunteering, culture, history, culinary experience, business travel and city tourism.

Kenya is rich with tourist attractions including abundant wildlife like the great migration in the Maasai Mara and Serengeti, costal treasures and cuisines in Mombasa and Malindi, Great Rift Valley, mountain ranges and Mount Kenya. National parks in Kenya include Maasai Mara, Amboseli, Tsavo, Lake Nakuru (flamingos), Hell's Gate and Ol Pejeta Conservation. Other areas of interest are Malindi and Mombasa tourist attractions (Fort Jesus and Marine Parks), safaris and hot air balloons.

## **ii. Contribution of the Tourism Sector to the Economic Development**

The major tourist activities in Kenya include holiday travel (68%), business travel (18%) and transit (14%). Tourism sector registered improved performance in 2018 mainly attributed to growth of aviation, investors' confidence, withdrawal of travel advisories, visits by foreign dignitaries and revitalized marketing efforts.

The sector earnings increased by 31.3% to Ksh. 157.4 billion in 2018. The number of international arrivals reached 2.027 million tourists in 2018. Travel and Tourism in Kenya grew faster than the regional average and significantly above other economies in Sub-Saharan Africa:

- a. Combined with domestic spending, Travel & Tourism supported 8.8% of the nation's GDP in 2018;
- b. Travel & Tourism is responsible for 8.3% of all Kenya's employment (1.1 million jobs);
- c. GDP contribution is projected to grow by 5.9% in 2019; and
- d. International tourists spent over Ksh. 157 billion accounting for over 15% of total export earnings.

## **iii. Training Institutions in Kenya**

The Kenya Utalii College (KUC) is a leading African hospitality and tourism training institute. It has trained over 60,000 graduates from around the world who continue to serve in the local and international hospitality and tourism industry. KUC is distinguished for providing world class training for both the local and international hospitality and tourism industry. Current, the college has students from Uganda, Rwanda and Zambia.

Kenya has other training institutes that offer courses relating to the tourism sector. However, there is no standardized curriculum for all institutes; therefore, there is a need for the government to develop minimum standards and curriculum for all institutions.

## **iv. Challenges Facing the Tourism Sector in Kenya**

- a. Globalization which is leading to the creation of uniform standards and protocols;

- b. Tourism is one of the most taxed sectors;
- c. Tourism and travel marketing can sometimes be deemed by visitors as inadequate, false, or exaggerated;
- d. Tourism infrastructure in many locations are outdated and underdeveloped;
- e. Lack of cooperation among tour operators; and
- f. Insecurity and destination crimes.

**v. Promotion of EAC as a Single Tourist Destination**

In promoting EAC as a single tourist destination, the EAC should focus its efforts in the following:

- a. Common criteria for classification of tourist accommodation and restaurants;
- b. Regional strategy to combat poaching and illegal trade and trafficking of wildlife and wildlife products;
- c. Collectively promoting and marketing the Community as a single region;
- d. Preferential entry fees and accommodation tariffs for East African Citizens within the region;
- e. Implementation of the Common Market Protocol and removal of non-tariff barriers to trade; and
- f. Development of the EAC international e-passport.

**vi. Discussion and Comments by Stakeholders**

- a. Tourism facilities and establishments are burdened with multiple licensing, multiple taxes and multiple levies,
- b. Training and capacity building are paramount to the development of tourism sector in the Community;
- c. Traditional sites (historic and cultural) need to be developed and promoted for the development of domestic and regional tourism;
- d. The EAC should put together strategies for conservation and promotion of the shared resources;
- e. The role of women in the tourism sector need to be enhanced and strengthened to enable women to participate in the entire value chain;

- f. Kenya classified 212 hotel and accommodation facilities. Classification of hotel and accommodation facilities will be mandatory to all facilities from 2020 as per the new law;
- g. Tour operators from Kenya are not allowed to enter in the National Parks of Tanzania. Permission may be granted at a cost of US\$ 200. The Committee was informed of the existence of a Memorandum of Understanding between the two Partner States which needs to be reviewed;
- h. The current criteria for the hotel classification need to be reviewed to address the shortcomings, unfairness and to take into consideration the emerging trend in the tourism sector;
- i. Kenya and Tanzania have a number of shared tourist resources, however, there are no harmonized standards and practices;
- j. Stakeholders from the tour guide noted that tour guides and tour drivers are not given priority in terms of training and capacity building;
- k. There is need to have cross border training for tour operators in the region;
- l. Partner States should establish Tourism Police Units;
- m. Kenya under the Tourism Regulatory Authority is developing the Kenyan Security Standards;
- n. Environmental degradation is one of the threats to the development of the sector;
- o. Kenya under the Tourism Regulatory Authority is developing the Food Safety Standards for Kenya; and
- p. Partner States should eliminate work permit fees in the tourism sector for professionals from other Partner States.

### **5.3 THE REPUBLIC OF SOUTH SUDAN**

#### **i. General Information**

The Republic of South Sudan is endowed with a unique and diverse tourist attraction. They include wildlife in their natural habitats, the massive wildlife migration at Boma and Badigilo National Parks which is the second to the annual animal migration between the Serengeti and Maasai Mara. The wildlife migration in South Sudan is within their ecosystem.

The tourist attractions and activities in the Republic of South Sudan include the six national parks and 14 game reserves. The geographical scenically is beautiful as well as the land scape with the variety of flora and fauna, historical sites, archaeological sites, the River Nile with its great rapid waterfalls, unique culture and colorful traditional dances. Other attractions are the Cathedral of St. Mary built since 1905 in Wau, the world's largest wetland known as Sudd and other wetlands and bird sites with species only available in the Republic of South Sudan. Other activities include sport fishing, boat cruising, water rafting, boats competition, golf course at Gordon hills at Nimule, forest walk, mountain climbing, nature treks and game drives. The Republic of South Sudan is rich in cultural heritage including strong kingdoms of Shilluk, Anyuak and Zandi. The country is therefore regarded as one of the significant virgin tourist destination.

**Table 4: Earnings from tourism in the Republic of South Sudan from 2014-2017**

Year	Earnings in US\$	Increase
2014	800,000	
2015	22,000,000	2,650%
2016	23,000,000	6.82%
2017	26,000,000	10.64%

Macrotrends with data from Word Bank: Available at <https://www.macrotrends.net/countries/SSD/south-sudan/tourism-statistics>. Accessed on 30<sup>th</sup> September, 2019

**ii. Achievements of the Tourism Sector in the Republic of South Sudan**

- a. The Ministry of Wildlife Conservation and Tourism formulated the Tourism Policy and the Wildlife Policy which were approved by the Council of Ministers of the Republic of South Sudan and forwarded to the Ministry of Justice and Constitutional Affairs in 2012 for finalization;
- b. Tourism and Wildlife Bills were formulated and approved by the Council of Ministers of the Republic of South Sudan. They were forwarded to the Ministry of Justice and Constitutional Affairs for legal input and finalization in 2012;

- c. Conducted hotel classification in 2018;
- d. Development of Tourism and Wildlife strategy;
- e. Conducted Aerial surveys for the National Parks of Boma, Badigilo and Nimule as well as Kidepo and Emotong Game Reserves. The survey was undertaken in collaboration with the Wildlife Conservation Society (WCS);
- f. In collaboration with the Wetland International Organization, the Republic of South Sudan conducted census on water birds at the Wetland of Nimule National Park;
- g. Conducted Avian Influenza surveillance mission at Bahr Gel and Bahr Naam in Lake States;
- h. Provision of training to professionals in the following areas:
  - Certificates and diplomas on wildlife and tourism management by the support of the Kenya Wildlife Services;
  - Training courses to senior officers of Wildlife and Tourism by the support of the Kenya Wildlife Institute;
  - English language training to Arabic speaking professionals at the University of Juba;
  - University of Juba offers courses on wildlife management and environment.
  - Training of game rangers for Nimule, Torit and Yambio areas; and
  - The Hotel Owners Association provides on job training to hotel workers. The Association is planning to start offering 3-6 months courses;
- i. The Anti-Poaching Unit has been patrolling all protected areas;
- j. Building lodge at Boma National Park;
- k. Signed Agreement with the Uganda Wildlife Authority on transboundary wildlife conservation;
- l. Ongoing renovation of the Nimule Park Lodge; and
- m. The Republic of South Sudan is party to Regional and International Conservation Treaties such as the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES).

### **iii. The Program to Develop the Tourism Sector in The Republic of South Sudan**

The program to develop the tourism sector in the Republic of South Sudan include developing and promoting tourist attraction sites by construction of roads, water catchment and drilling boreholes, airstrips, accommodation facilities and office facilities.

Other areas are:

- a. Training of game rangers and game wardens in wildlife management;
- b. Conduct survey on wildlife in South Sudan;
- c. Deployment of 60% of wildlife forces in all protected areas;
- d. Provide conducive environment for investment in tourism and hotel industry;
- e. Mobilization of local and external resource for sustainable development and management of tourism sector in the Republic of South Sudan;
- f. Establishment of resource center for training and research; and
- g. Development of community eco-tourism projects for the purpose of enhancing cultural tourism.

### **iv. Challenges Facing the Tourism Sector in the Republic of South Sudan**

The Republic of South Sudan faces the following challenges:

- a. Insecurity caused by political instability, poverty and unemployment;
- b. Inadequacy of data and research;
- c. Lack of relevant policies and laws to regulate the tourism sector;
- d. Poor and inefficient infrastructure including poor road network especially on the tourism circuits, communication services, lack of electricity and water services;
- e. Inadequate financial resource for the development of the tourism sector;
- f. Inadequate skilled human resource;
- g. Lack of training facilities,
- h. Tourism sector is dominated by foreigners;
- i. Rampant poaching caused by insecurity in the country and insufficient trained personnel and equipment such as vehicles and communication;

- j. Lack of the awareness among the general public and decision makers;
- k. Uncoordinated effort of different levels of government (Federal government, State Government and Local Government); and
- l. The Republic of South Sudan does not have a Tourism Board and other regulatory authorities.

## 5.4 THE REPUBLIC OF RWANDA

### i. General Information

Tourism industry is a strategic priority for the government of Rwanda. It is fundamental for the transformation and modernization of the national economy. Tourism has been the leading foreign exchange since 2007 and it is the primary source of foreign contribution to the country. The tourist attractions in Rwanda include wildlife protected areas such as Volcanoes National Park, Akagera National Park, Nyungwe National Park, reserves and sanctuaries lakes, rivers and swamps. There are 14 species of primates, 4, 507 meters to top of the highest volcano – Mount Karisimbi. It is the home of the first and only one canopy walkway in East Africa. It has over 4,000 hectares of bamboo forest, more than 1,000 hills, 700 bird species and more than 1,500 animal species. Other attractions are adventure, cultural heritage corridor, community-based tourism and conservation.

**Table 5: Contribution of tourism to the economic development of Rwanda**

Direct GDP	Indirect GDP	Employment	Tourism over export of goods and services
3%	10%	18%	29%

Rwanda Development Board: presentation made to the Committee during this activity

Rwanda Development Board manages tourism sector under the Department of Tourism and Conversation. It implements the Rwanda Tourism Policy, 2009, Tourism Vision 2024 and Sustainable Tourism Development Master Plan. Strategies to develop tourism in Rwanda include the following:

- a. Unlocking the country;
- b. Quality infrastructure;

- c. Product diversification: new products include the Congo Nile Tail, water sports and bird watching in and outside the national parks;
- d. Rwanda film office established; and
- e. Strategic partnership (visit Rwanda – Arsenal Football Club and Alibaba Group).

The Tourism Master Plan put emphasis on priority areas and product diversification. Priority areas for tourism development known as Destination Management Areas (DMAs) were designated. These are Volcanoes, Akagera, Gisenyi, Muhazi, Kibuye and Nyungwe DMA.

**ii. Achievements of the Tourism Sector in the Republic of Rwanda**

Over the past decade, Rwanda has achieved remarkable progress and development in the tourism sector. For example, in 2018, Rwanda received 1,700,000 visitors of whom 39% were from EAC Partner States. It collected revenue of USD 374 million which was the highest amount of foreign exchange. In the same year, the country was having 14,000 hotel rooms and 170 flights per week.

**Table 6: Development of Tourism in Rwanda between 2010 and 2018**

Area	2010	2018
Total arrivals	666,000	1,700,000
Parks visits	45,400	94,000
Flights per week	86	167
Hotel rooms	4,700	14,866

Rwanda Development Board: presentation made to the Committee during this activity

The following are some of the achievements that have contributed to the growth of Tourism sector:

- a. Adoption and implementation of tourism law on licencing tourism entities in order to establish a common code of conduct for tour and travel operators, standardise hotel classifications and harmonise the professional standards of agents in the tourism and travel industry;

- b. Adoption and implementation of national tourism policy to co-ordinate policies in the tourism industry and establish a framework of co-operation in the sector that ensures equitable distribution of benefits;
- c. Adoption of single tourist Visa which has accelerated the growth of tourism sector and the use of National IDs as travel documents;
- d. Increased tourism receipts in a sustainable manner and participation of private sector in driving the tourism growth;
- e. Conserve the biodiversity inside the protected areas for the benefit of future generation;
- f. Ongoing construction of new international airport, renovation and expansion of the existing international and local airports and enhancement of road network countrywide;
- g. The government has invested significantly in the national carrier (Rwanda Air) which is greatly expanding and boosting the tourism sector. Currently Kigali is served by international airlines such as SN Brussels, KLM, Qatar airways, Turkish airline, Ethiopian airline, Kenya airways and Fly Dubai;
- h. The rise of Rwanda as a major Meeting, Incentives, Conferences and Exhibitions (MICE) destination hosting many African and global events such as World Economic Forum on Africa, Forum for Agriculture Research in Africa, the Global Africa Investment Summit, Africa Carbon Forum, African Union Summit, Transform Africa Summit, CEO Forum among others; and
- i. Establishment of 26 tourism and hospitality schools, 12 vacation training centres, 2 universities which offer bachelor degrees in tourism and hotel management and 1 college for diploma in hospitality management.

### **iii. Challenges Facing the Tourism Sector in the Republic of Rwanda**

The following are the challenges facing tourism sector in the Republic of Rwanda

- a. Over-reliance on a single product. Over the years, there has been a dependency on the gorilla product as a major source of tourism revenue and 90 percent of tourism earnings are driven by gorilla tours;

- b. International awareness and perception of Rwanda. There is need to project the clear image of Rwanda as wildlife, eco-tourism, cultural and conference destination;
- c. Difficult in accessing land for tourism investments. Land is privately owned and very scarce to be accessed by investors;
- d. Low availability of finance and partnership for private sector investment;
- e. Little involvement of communities and Macro. Small and Medium Enterprises (MSMEs);
- f. Under-developed regulatory framework for the tourism sector;
- g. Air tariffs are still high. Despite increased regional connections to neighbouring countries, Rwanda still has limited airlift from her main tourism source markets of North America, Europe and Asia;
- h. Low capacity and under-skilled human resource, and
- i. Constraints caused by infrastructure problems.

## **5.5 REPUBLIC OF UGANDA**

### **i. Introduction**

Uganda branded itself as "Gifted by Nature". It has many tourist attractions including wildlife, nature, geography, culture, heritage, good weather all the year around, MICE, hospitable people and culinary art (Kampala food week, and Rolex Festival). Tourists sites in Uganda include the source of the Nile, Mountains (Rwenzori, Elgon, Mugahinga, and Kigulu Hill) the Equator, Bishop Hannington Site, Hot Springs, Handicraft and Souvenir Development, Marine Tourism and Sport Tourism. The national parks include: Murchison Falls, Queen Elizabeth, Kidepo, Lake Mburo, Mt. Rwenzori, Mt. Elgon, Semliki Valley and Mugahinga national park for gorilla tracking. There is a number of forest reserves with a variety of primate species. Other activities for tourism are golf tourism, fashion tourism, filming tourism, night life in Kampala, Kampala sight-seeing, faith-based tourism and educational tourism.

## ii. Contribution of the Tourism Sector to the Economic Development

Uganda witnessed a 7.4% increase in international tourist arrivals in 2018, growing from 1,402,409 in 2017 to 1,506,669 in 2018. Direct revenue from international tourism rose from US\$ 1.453 billion in 2017 to US\$1.6 billion in 2018. Tourists from international air accounted for approximately 31% of the total international tourist arrivals to Uganda in 2018, growing by 10.2% compared to the previous year. African land markets (regional and neighboring countries to Uganda) contributed 69% of Uganda's international arrivals, and grew by 6.1% in 2018. Over the past 10 years, the tourist arrivals into Uganda have steadily increased from 850,000 arrivals in 2008 to over 1.505 million in 2018.

The earnings from tourism have been increasing steadily from USD 979 million in 2013 to USD 1.6 billion in 2018. In 2018, tourism continued to be the leading foreign exchange earner by generating USD 1.6 billion from 1,505,669 visitors. The category of visitors with the highest expenditure is leisure visitors, who made up 20.1% of the total visitors.

The total contribution of Tourism to GDP, including wider effects from investment, the supply chain and induced income impacts, was UGX 8,364.6 billion in 2018 (7.7% of GDP). Tourism generated 667,600 jobs in 2018 (6.7% of total employment) and it is estimated to grow to 971,900 jobs in 2029.

**Table 7: Contribution of tourism sector in Uganda**

Earnings	GDP	Employment	% of total employment
UGX 8,364.6 Billion.	7.7%	667,600	6.7

Presentation by the Ministry of Tourism, Wildlife and Antiquities made during this activity

## iii. Strategies to Develop the Tourism Sector in Uganda

The Uganda Tourism Board together with other stakeholders have put in place strategies to develop tourism in the Republic of Uganda. Key strategies include:

- a. Aggressive marketing of Uganda;
- b. Developed relevant policy and laws to govern the tourism sector;
- c. Diversifying tourism product range;
- d. Improving tourism and hospitality skills along the tourism value chain;
- e. Provision of tax incentives to investors in the sector including purchase of tourist motor vehicles;
- f. Strengthening conservation of natural and cultural heritage; and
- g. Domestic tourism campaign e.g. Tulambule (let us go and tour).

#### **iv. Challenges facing the Tourism Sector in Uganda**

The challenges that affect the tourism sector in Uganda include the following:

- a. Limited promotion of Uganda's attractions during international conferences held in Uganda;
- b. Weak capacity in terms of instructional infrastructure for training manpower and the human resource;
- c. Lack of harmonization of tourism statistics from various sources.
- d. Inadequate funding especially lack of credit to local small-scale investors;
- e. Poaching;
- f. Climate change, deforestation and pollution of rivers;
- g. Poor infrastructure in some parts of the country;
- h. Over taxation by government authorities;
- i. Encroachment by communities into national parks. Examples in Mount Elgon and Kapchorwa;
- j. Lack of high-end medical facilities in the region;
- k. Negative talk on the country by service providers especially taxi operators,
- l. Poor services provided by some tour operators, travel agents and accommodation facilities;
- m. The inability of the government to provide sufficient funds for sector development; and
- n. Failure of the communities to play a significant role in protecting natural and cultural resources in Uganda.

## **5.6 THE UNITED REPUBLIC OF TANZANIA**

### **i. Introduction**

The United Republic of Tanzania is the largest country in East Africa with an area of 947,303 square kilometers. About 28% of its land is set aside as protected areas which include 19 National Parks, 23 Game Reserves, 42 Game Controlled Areas, 4 Ramsar Sites, 2 Marine Parks in Tanzania Mainland and 3 in Zanzibar, 1 Gorge, 33 wildlife management areas, 17 Nature forest reserves. There are more than 125 archaeological and historical sites, 1,440 kms of coastline, the Spice Islands of Zanzibar, Africa's highest Mountain, Mount Kilimanjaro and deep-sea resources. Some of the national parks in Tanzania are Serengeti, Ngorongoro, Ruaha, Mikumi, Gombe and Arusha.

The UNESCO inscribed seven areas as World Heritage Sites. Five of these are the Ngorongoro Conservation Area, Mount Kilimanjaro, Selous Game Reserve, the Serengeti National Park and the Zanzibar Stone Town.

The main tourist activities in Tanzania Mainland include wildlife which is the dominant tourism product in Tanzania. Other activities are beach, cultural, business, mountain climbing and conferences.

Zanzibar is famous for its outstanding history and culture, beaches and spices. Beach tourism continued to be the main tourism activity in Zanzibar accounted for 78.4% of total visitors to Zanzibar in 2018. Cultural Tourism is the second attractive activity consistent with the declaration of Stone Town as UNESCO World Heritage site. The spice tour is another important tourist product in Zanzibar.

The new tourism products developed by the United Republic of Tanzania include Geo Park Tourism, Eco-Tourism, Festivals, and MICE.

### **ii. Contribution of the Tourism Sector to the Economy**

In 2018, Tanzania received 1.5 million tourists and more than USD 2.4 billion. The amount received comprised more than 25% of the total exports, 60% of receipts from

services and 9% of total investment according to the World Travel and Tourism Council of 2018. The sector currently supports over 467,000 direct jobs and 1,337,000 other jobs through direct and indirect linkages, which is equivalent to 12.2% of the total employment. By 2028, it is anticipated that direct jobs will rise to 795,000, which will constitute 4.0% of total employment. The value of tourism investment reached USD 746.5 billion which translates to 8.7% of total investment in 2017.

**Table 8: Contribution of tourism sector to economic development in 2018**

Arrivals	Revenue	Share of export	Direct employment	Indirect employment	Share of employment
1.5 mil	USD 2.4 billion.	25%	467,000	1,337,000	12.2%

Presentation by the Ministry of Natural Resources and Tourism made during this activity

### iii. Strategies to Develop the Tourism Sector

The National Tourism Policy guides the development of tourism sector in Tanzania. The Tourism Masterplan was developed in 1996 and reviewed in 2002 to provide strategic roadmap for the tourism development. The Tourism Act and its regulations were enacted in 2008. To this end, the policy and related strategies played significant role in enhancing tourism development in Tanzania. Other strategies include strengthening public-private dialogue and establishment of the Tourism Confederation of Tanzania (TCT). TCT is the Apex body representing the private sector involved in travel and tourism industry in Tanzania. Other strategies are:

- a. Strengthening destination marketing efforts (joint public and private sector);
- b. Regular review of institutional and legislative framework for the tourism sector;
- c. Strengthening the National College of Tourism to address the training needs of the industry;
- d. Diversification of tourism products strategy.

### iv. Regional and International Cooperation in Tourism

Tanzania recognizes the importance of bilateral and regional cooperation in the growth of the tourism sector. It remains committed to supporting and abiding with resolutions, agreements and cooperation in the bilateral, regional and international levels of the tourism sector:

Tanzania tour operators established partnerships with their counterparts in the region and are cordially doing businesses;

It is a member of the East African Tourism Platform (EATP) – a private sector body for tourism in East Africa, working towards promoting the interest and participation of the private sector in the EAC integration process;

- c. The Tanzania Tourism Board and other tourist boards in the region have cordial working relations in the marketing of destination East Africa. Each tourism marketing body participates in the tourism fairs organized by other member states – Magical Kenya (Kenya), Pearl of Africa Tourism Expo (Uganda), and Swahili International Tourism Expo (Tanzania);
- d. Grading and classification of tourist facilities is being implemented based on EAC Criteria; and
- e. Joint marketing in the major tourism fairs (ITB and WTM). Partner States hold EAC Day, EAC ambassadors meeting and use of EAC promotional materials.

#### v. Achievements of the Tourism Sector in Tanzania

- a. Destination Marketing. The use of social media to monitor who has interest in Tanzania. It also assists in gathering information and data;
- b. Rebranded Tanzania to “**Tanzania Unforgettable**”;
- c. Established a Tanzania Safari Channel in conjunction with Tanzania Broadcasting Corporation;
- d. The Tanzania National Carrier (Air Tanzania) which enables the access to key markets; and
- e. Establishment of tourist information hub by the Tanzania Tourism Board.

#### vi. Challenges Facing the Tourism Sector in Tanzania

- a. Overdependence on foreign markets in particular Europe and North America;

- b. Inadequate funding in tourism related activities;
- c. Inadequate skilled work force and expertise in the tourism and hospitality sector;
- d. Inadequate tourism infrastructure and facilities;
- e. Overdependence on wildlife product;
- f. Lack of diversity in terms of products and geographical coverage leading to slow growth of the tourism sector;
- g. Negative advisories from some source markets and stiff competition from relatively less cost travel destinations;
- h. Non harmonization of policies and strategies;
- i. Limited participation in joint international tourism promotion, fairs and exhibitions;
- j. Lack of common approach for implementation of regional agreements;
- k. Inadequate research and development; and
- l. Under developed framework for e-commerce.

## **6.0 OBSERVATIONS OF THE COMMITTEE**

Tourism is one of the key economic sectors that contribute to the economic growth, provision of employment and poverty eradication. During this activity, the Committee observed the following:

1. All EAC Partner States are endowed with tourist attractions which need to be developed for the Community to realized its full potential from the sector;
2. Major challenges facing tourism sector across the region include underfunding to the sector, insecurity, poor infrastructure, inadequate trained human resource, high cost of air transport, lack of research, data and statistics and non-harmonized policies and laws;
3. The efforts of marketing EAC as a single tourist destination are hampered by a number of obstacles including unharmonized taxes, fees and other charges and non-participation of some Partner States in the EAC Single Tourist Visa;
4. The system of sharing revenue from the EAC Single Tourist Visa is not yet developed;
5. Partner States are developing other products apart from beaches and safari;


The contribution of domestic and regional tourism to the tourism sector is still

6. low;

7. The contribution of tourism to the development of other sectors like agriculture is still low because some goods and services consumed by tourists are imported from other countries outside the East African Community;
8. Tour guides and tour drivers are not provided with necessary training although they play a significant role in the development of the sector;
9. There is no strong regional institution or regulating board which could regulate and promote tourism in the region;
10. Cooperation among Partner States is still a problem;
11. The Council of Minister is taking too long to conclude the negotiation and development of the EAC Protocol on Tourism and Wildlife Management;
12. Partner States are still discriminating citizens from other Partner States in accessing tourist facilities and sites;
13. Non-Tariff Barriers still exists in the tourism sector;
14. The EAC Partner States do not have Food Safety Standards;
15. Awareness and participation of citizens is low in some Partner States;
16. Tour operators face a number of challenges in entering other Partner States with tourists:
17. Some of the Partner States do not have Tourism Board and other regulatory authorities;
18. There are discrepancies of data (data received from EAC Secretariat differs with some data received from the Partner States during the undertaking of this activity); and
19. The high cost of telephone roaming charges in some Partner States affect the development of tourism sector in the Community.

## 7.0 RECOMMENDATIONS

The Committee on Agriculture, Tourism and Natural Resources makes the following recommendations:

- 
1. The Council of Ministers to fast track the conclusion of the EAC Protocol, on Tourism and Wildlife Management;
  2. The Council of Ministers to implement the Resolution passed by the Assembly urging the East African Community to establish the EAC Tourism and Wildlife Coordination Agency;
  3. The Republic of Kenya, United Republic of Tanzania and the Republic of Uganda need to review/develop the Memorandum of Understanding on cross border tourism operations;
  4. The Council of Ministers and Partner States to develop guidelines to ensure smooth flow of tourists and tour operators across borders and within the Community;
  5. The Council of Ministers to establish and strengthen the pool of EAC Classification Assessors to ensure efficiency and effectiveness in classification of tourism establishment;
  6. The Republic of South Sudan to finalize the development of tourism and wildlife policies, the enactment of relevant laws and establishment of the Tourism Board;
  7. The Republic of Burundi to enact specific law to regulate the tourism sector in Burundi;
  8. Partner States to harmonize their national laws on tourism and related sectors;
  9. The Council of Ministers to direct Partner States to stop discrimination of citizens from other Partner States in accessing tourist facilities and attractions;
  10. The United Republic of Tanzania and the Republic of Kenya to jointly convene a meeting of tour operators between the two Partner States to find amicable solution in regard to handling tourists across the borders of the two Partner States;
  11. The Council of Ministers to direct all Partner States to prioritize tourism sector and allocate adequate resources to boost the sector in the Community;
  12. Partner States to create awareness among the citizens on the importance and contribution of the tourism sector in the economic development and creation of employment;

13. The Council of Ministers to develop various required regional standards including the EAC Security Standards, the EAC Food Safety Standards, the EAC Tour Operators Standards and the EAC Harmonized Hotel Standards;
14. The Council of Ministers to urge the Republic of Burundi, Republic of South Sudan and the United Republic of Tanzania to join the EAC Single Tourist Visa;
15. The East African Community should establish a regional training institute for human capital skills into different tourism sectors;
16. The Council of Ministers to facilitate the joint tourism marketing of EAC as the best tourist destination on the African continent;
17. Increase Intra-Regional and domestic tourism campaign for the Partner States to explore their potential in terms of business exchange visits, agricultural exhibitions, educational, cultural and religious expeditions within the region;
18. Joint documentation and research in the different tourist products available in the region;
19. The Community should put together strategies for conservation and promotion of the shared tourism resources and attractions; and
20. Create a well-coordinated and digitalized information exchange amongst the tourism board hubs for the advancement of joint tourist visa mechanism of attracting tourist in the region.

## **8.0 ANNEXES**

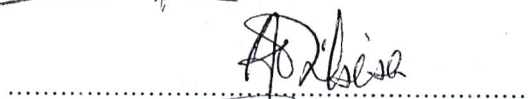
Annexed to this report are copies of presentations from the Partner States on the performance of the Tourism Sector.

**REPORT OF THE COMMITTEE ON AGRICULTURE TOURISM AND NATURAL RESOURCES FOR THE OVERSIGHT ACTIVITY ON THE PERFORMANCE OF THE TOURISM SECTOR IN THE EAST AFRICAN COMMUNITY, HELD FROM 9<sup>TH</sup> TO 12<sup>TH</sup> SEPTEMBER, 2019**

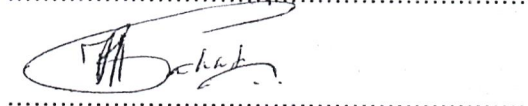
1. Hon. Mathias Kasamba



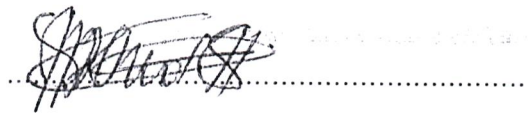
2. Hon. Adam O. Kimbisa



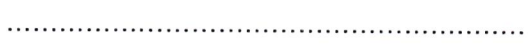
3. Hon. Alex Bahati




4. Hon. Alfred Ahingejeje



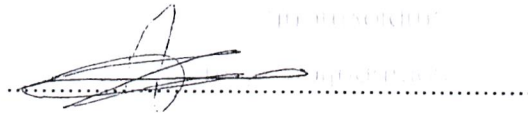
5. Hon. Chris Opoka- Okumu



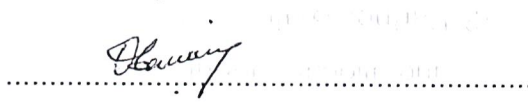
6. Hon. Dr. Anne Itto Leonardo



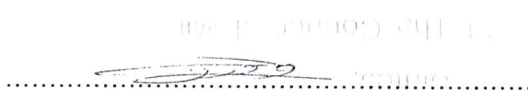
7. Hon. Dr. Arol Garang Aher Gabriel



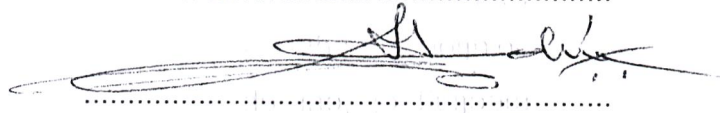
8. Hon. Dr. Oburu Oginga



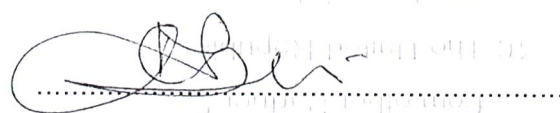
9. Hon. Dr. Woda Odok Jeremiah



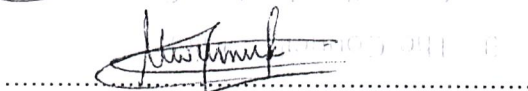
10. Hon. Eng. Mohamed H. Mnyaa



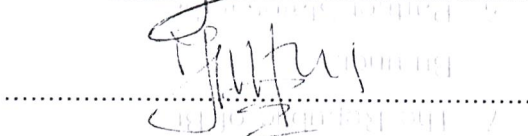
11. Hon. Fatuma Ibrahim Ali



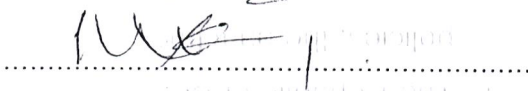
12. Hon. Francoise Uwumukiza



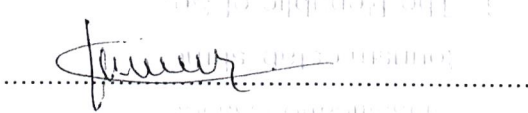
13. Hon. Josephine S. Lemoyan



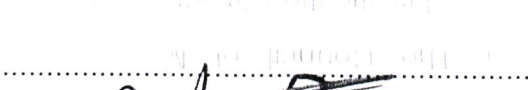
14. Hon. Mary Mugenyi



15. Hon. Mo-Mamo Karerwa



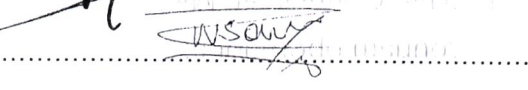
16. Hon. Nooru Adan Mohamed



17. Hon. Pierre Celestin Rwigema



18. Hon. Sophie Nsavyimana



LAI D ON TABLE  
ON THE 3/10/19

A handwritten signature in black ink, appearing to be 'D. M. ...', written over a horizontal line.

**ANNEXES TO THE REPORT OF THE  
COMMITTEE ON AGRICULTURE,  
TOURISM AND NATURAL RESOURCES  
OVERSIGHT ACTIVITY ON THE  
PERFORMANCE OF THE TOURISM  
SECTOR IN THE REGION**



## EAST AFRICAN COMMUNITY

TOURISM AND WILDLIFE MANAGEMENT IN EAC

PRESIDENTIAL COMMITTEE ON AGRICULTURE, LIVELIHOODS AND TOURISM



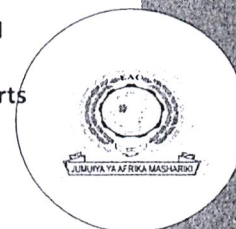
### EAC Treaty -Cooperation in Tourism and Wildlife Management

**Article 115 :** The Partner States undertake to develop a collective and coordinated approach to the promotion and marketing of quality tourism into and within the Community

- co-ordinate policies in the tourism industry and establish a framework of cooperation in the sector that will ensure equitable distribution of benefits
- establish a common code of conduct for private and public tour and travel operators, standardize hotel classifications and harmonize the professional standards of agents
- develop a regional strategy for tourism promotion whereby individual efforts are reinforced by regional action

**Article 116:** The Partner States undertake to develop a collective and coordinated policy for the conservation and sustainable utilization of wildlife and other tourist sites in the Community.

- Harmonize policies on wildlife conservation
- Exchange information
- co-ordinate efforts in controlling and monitoring encroachment and poaching activities



## Economic Significance of Tourism in EAC (GDP & Export Earnings)



Country	Total Contribution to GDP (%)	Total Contribution to Export Earnings (%)
Burundi	5.1	1.5
Kenya	9.7	18.1
Rwanda	12.7	30.5
South Sudan	-	-
Tanzania	9.0	26.0
Uganda	7.3	17.9
Average	8.8	18.8

## Economic Significance of Tourism in EAC (Employment)



Country	Employment			Total % contribution to employment
	Direct	Indirect	Total	
Burundi	41,500	49,000	90,500	4.4
Kenya	429,500	707,500	1,137,000	9.0
Rwanda	132,000	201,500	333,500	11.1
South Sudan	-	-	-	-
Tanzania	446,000	646,500	1,092,500	8.2
Uganda	229,000	376,500	605,500	6.3
Total	1,278,000	1,981,000	3,259,000	(Average) 7.8

## EAC Vision 2050 and Tourism

- ✓ Tourism, trade and services comprise one of the six pillars of Vision 2050
- ✓ The Vision projects the number of jobs directly and indirectly supported by the sector to increase from an estimated 1.7 million jobs in 2008 to about 2.3 million jobs by in 2025. This is expected to increase to 5.6 million jobs by the end of the Vision 2050 plan period.
- ✓ The Vision Prioritizes joint interventions in tourism products that are competitively priced, cost effective and have a high return on investment
- ✓ The Vision stresses the need for conservation of the natural and cultural heritage, human settlements, the revitalization of historic sites and the rehabilitation of cities.
- ✓ The Vision prioritizes joint aggressive promotion in key source markets to increase visibility

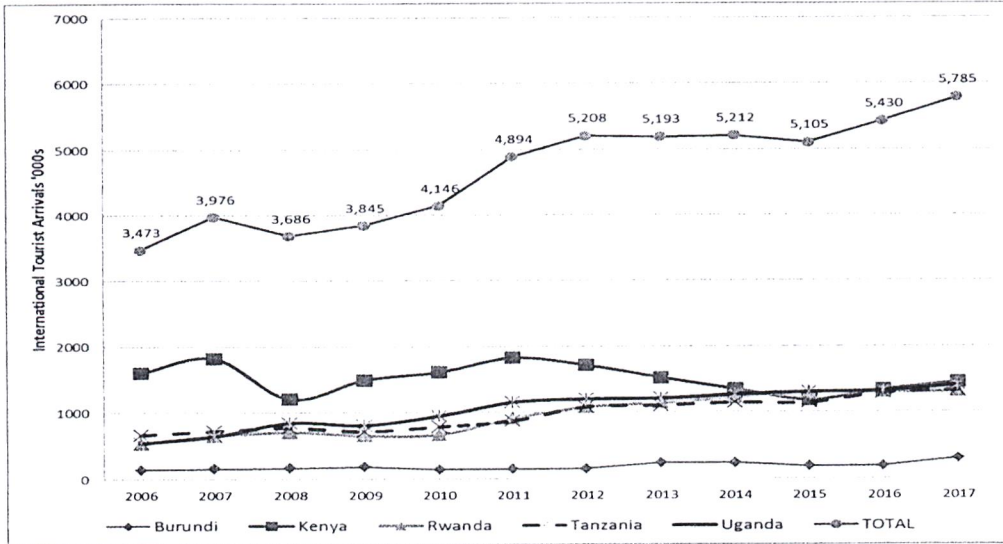


## Achievements and On-going Activities in the EAC Tourism and Wildlife Sector

- ✓ Review of Classification Criteria for tourism accommodation establishments and restaurants
- ✓ Participation in international trade fairs – WTM and ITB since 2007/2008
- ✓ Participation in Regional Tourism Fairs
- ✓ Preferential rates for EAC Citizens to tourist attraction sites and for hotels
- ✓ Protocol on Tourism and Wildlife – approved by Sectoral Council on Tourism and Wildlife Management –submitted to the Council. URT requested for time to undertake internal approvals
- ✓ Strategy to combat poaching and illegal trade in wildlife and wildlife management
- ✓ Single tourist visa –introduced by Republics of Kenya, Rwanda and Uganda.
- ✓ Development of a Regional Tourism Marketing Strategy

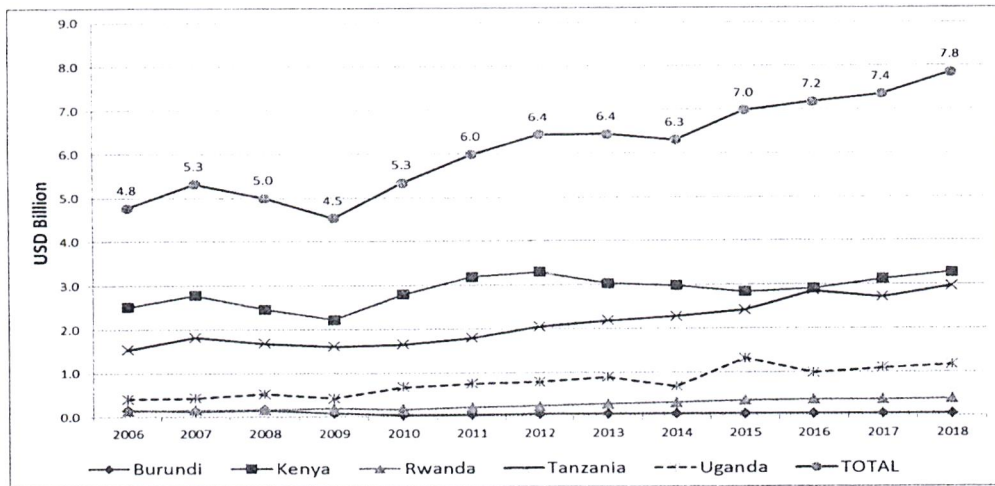


### Total Tourism Arrivals in EAC



Source: UNWTO and National Economic Surveys (Various Years)

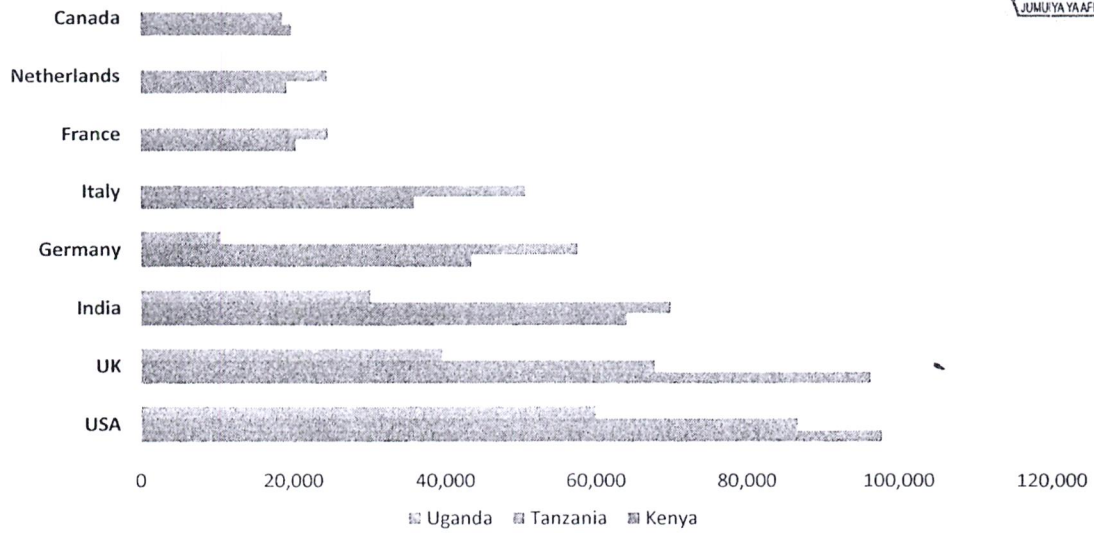
### Tourism Earnings by Partner State (US \$ Mn)



Source: UNWTO and National Economic Surveys (Various Years)

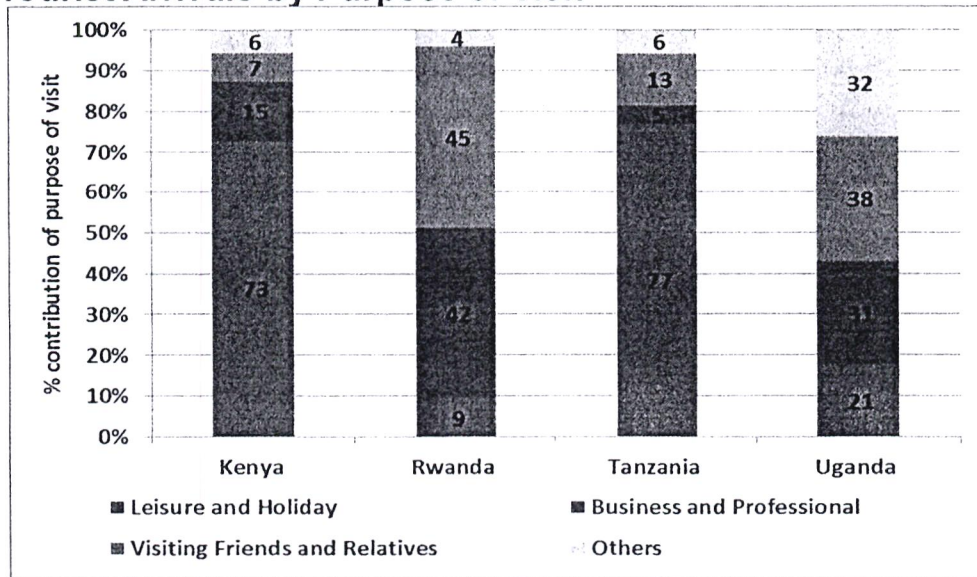


### Top Overseas Markets for EAC – 2016



Source: UNWTO and National Economic Surveys

### Tourist Arrivals by Purpose of Visit



Source: Draft EAC Tourism Marketing Strategy



### 5<sup>TH</sup> EAC Development Strategy - Proposed Strategic Interventions for 2017 – 2022

Strategic Interventions	Targets
Enhance cooperation in tourism and wildlife management	<ul style="list-style-type: none"> <li>• Finalize protocol on tourism and wildlife management</li> <li>• Harmonize laws and policies</li> <li>• Harmonize systems of tourism statistics</li> </ul>
Develop and implement a collective approach and strategy on promotion and marketing of quality tourism	<ul style="list-style-type: none"> <li>• Revise tourism marketing strategy</li> <li>• Identify, map and package transboundary and key tourist attractions</li> <li>• Rebrand promotional materials</li> <li>• Enhanced Joint promotion at International trade fairs</li> <li>• Joint promotion at regional trade fairs</li> <li>• Full implementation of single tourist visa</li> <li>• Revise classification criteria</li> <li>• Minimum and professional standards</li> </ul>

### Proposed Strategic Interventions for 2017 – 2022



Strategic Interventions	Targets
Promote tourism investments opportunities	<ul style="list-style-type: none"> <li>• Develop tourism investment guidelines and incentive package</li> <li>• Organize Regional Tourism Fora</li> </ul>
Build and strengthen capacity in tourism and wildlife sectors	<ul style="list-style-type: none"> <li>• Train new assessors</li> <li>• Identify and promote centres of excellence</li> <li>• Harmonize curricula</li> <li>• Upgrade value chains</li> </ul>
Collective approach in wildlife conservation and management	<ul style="list-style-type: none"> <li>• Implement the Regional Strategy to Combat poaching and illegal trade and trafficking of wildlife and wildlife products</li> </ul>

## Main Challenges



- ✓ High cost of travel in the region
- ✓ Over-taxation in the tourism sector
- ✓ Infrastructure – inadequate connectivity within the region and to tourist attractions
- ✓ Funding – product development and marketing
- ✓ Inadequate human resource at the Secretariat
- ✓ Inadequate involvement of private sector in EAC
- ✓ Poaching and encroachment of wildlife habitats

## Proposed Areas of Support by EALA



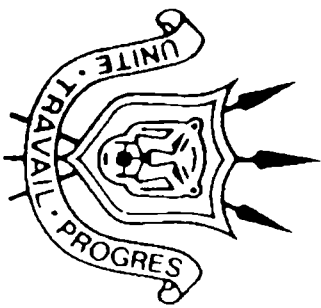
- ✓ Fast-tracking finalization of the Protocol on Tourism (URT and Council of Ministers)
- ✓ Full implementation of Single Tourist Visa – advocacy and development of necessary legal framework
- ✓ Advocacy on Regional Strategy to Combat Poaching and Illegal Trade and Trafficking of Wildlife and Wildlife Products
- ✓ Development of Regional Tourism and Wildlife Laws
- ✓ Resource Mobilization



**Thank You**

REPUBLIQUE DU BURUNDI

*•*  
Bujumbura, le



MINISTERE A LA PRESIDENCE  
CHARGE DES AFFAIRES DE LA  
COMMUNAUTE EST AFRICAINE  
CABINET DU MINISTRE

Réf : 1701/ /CM/2019

**DRAFT SPEECH BY HER EXCELLENCY ISABELLE NDAHAYO, MINISTER TO THE  
OFFICE OF THE PRESIDENT RESPONSIBLE FOR EAST AFRICAN COMMUNITY  
AFFAIRS,**

**ON THE OCCASION OF THE OPENING CEREMONY OF THE OVERSIGHT ACTIVITY OF  
THE EAST AFRICAN LEGISLATIVE ASSEMBLY COMMITTEE ON AGRICULTURE,  
TOURISM AND NATURAL RESOURCES TO LIAISE WITH STAKEHOLDERS FOR  
PERFORMANCE OF THE TOURISM SECTOR IN THE REGION,  
MOUNT ZION HOTEL, BUJUMBURA, 10<sup>TH</sup> SEPTEMBER, 2019**

**Honourable Members of the East African Legislative Assembly Committee on Agriculture, Tourism and Natural Resources;**

**Honourable Members of National Assembly, Members of the Agriculture, Tourism and Natural Resources Commission;**

**Distinguished Representatives from Burundi Public and Private Sectors;**

**Distinguished Stakeholders from the Tourism Industry Sector;**

**Members of EALA Staff; Distinguished Invited Guests; Ladies and Gentlemen;  
All protocols observed.**

1 Good morning. I have the single honour to be here with all of you today, as we solemnly proceed to the opening of the one-day oversight activity related to **the performance of the Tourism sector in the East African Community.**

2 On behalf of the People and the Government of Burundi, and on my own behalf, I would like to wish a warm welcome to all Participants; and especially those from East African Community Legislative Assembly. Let me take this opportunity to wish you a pleasant stay and a successful mission in the Republic of Burundi and invite you to enjoy the traditional hospitality of Burundian people.

3 The Republic of Burundi is delighted to host today's oversight activity, which we believe shall be successful. We thank the East African Legislative Assembly for

organizing in Bujumbura City, and especially in this beautiful and inspiring Mount Zion Hotel, such an important Activity on this critical topic.

**Honourable, Excellencies, Distinguished Invited Guests, Dear participants Ladies and Gentlemen;**

4 The East African Legislative Assembly Committee on Agriculture, Tourism and Natural Resources plays a key role in bringing the people of East Africa on board of the integration process, as far as Agriculture, Tourism and Natural Resources Sectors are concerned.

5 Through the oversight activities, the East African Legislative Assembly carries out an assessment of EAC Projects and Programmes with a view of identifying progress made, existing gaps, challenges and charting out the way forward in order to ensure sustainable development.

6 As you are all aware, the Treaty for the Establishment of the East African Community, and especially in Article 115, stipulates that Partner States agree to develop a collective and coordinated approach to the promotion and marketing of quality tourism into and within the Community.

7 It is reported that the sector contributes an average of 9.6 per cent of GDP, 19.9 per cent of export earnings and 8.3 per cent of employment in the Community; and tourism is one of the six pillars of the EAC Vision 2050, which anticipates that the number of jobs resulting from tourism either directly or indirectly will increase from 1.7 million from 2008 estimates to 2.3 million by 2025. In the same vein, statistics

indicates that the EAC received an average of 5,158,623 Tourists per year from 2011 to 2016.

**Honourable, Excellencies, Distinguished Invited Guests, Dear participants Ladies and Gentlemen;**

8 Tourism therefore as an economic sector, plays a significant role in the EAC integration process. The East African Community has recorded some impressive achievements in the realm of tourism owing to concerted efforts by EAC Partner States to work together in promoting growth in the sector.

9 To this effect, the East African Community registered classification of accommodation facilities and restaurants, participation in the region and international fairs, preferential rates for EAC citizens in tourist sites and hotels.

10 Other achievements are the development of a Protocol on Tourism and Wildlife, a Strategy for combating Poaching, a Single Tourist Visa, commencement of the development of a Regional Tourism Marketing Strategy and adoption of One Health Platform.

11 This being the case, the sector is still facing some challenges in the region, including overdependence on safari and beach products, high costs of transport, poor infrastructure, poaching, and inadequate resources both financial and human at the East African Community.

**Honourable, Excellencies, Distinguished Invited Guests, Dear participants  
Ladies and Gentlemen;**

12 Tourism is a relatively small industry in Burundi, accounting for only 3% of the country's GDP (Republic of Burundi, 2011). The tourist numbers and revenue trends increased slightly from 2004, when 133,000 tourists visited our country, generating USD 1.8 million, and peaked in 2006 with 214,000 visitors, generating USD 1.6 Million, before dropping in 2007. From then to 2012, there has been no meaningful increase with a downward trend. Tourism therefore remains a small and undeveloped economic sector contributing less than a quarter of one per cent to Burundi's economy compared to its Eastern Africa neighbors.

13 However, it has great potential with the return of political stability and economic growth that is picking up in terms of its GDP performance.

14 The geographical location of Burundi in the heart of Africa and its wonderful landscapes are making the country a real paradise which is sometimes called "The Switzerland in Africa." The mild and moderate temperature climate in Burundi as well as the variety of its geographical structure are making the country the best place for holidays and relaxation, with a great tourism industry potential.

15 However, Burundi is a landlocked, resource-poor country with an underdeveloped manufacturing sector. The main stay of the Burundian economy is agriculture, supporting more than 90% of the labour force, the majority of which consists of subsistence farmers.

16 Although Burundi is potentially a self-sufficient as far as food production is concerned, subsistence economy has still been around 25% in recent years. The main industries comprise light consumer goods, such as blankets, shoes, soap, and assembly of imported components, public works construction and food processing.

17 Many of the tourist attractions in the country are in Bujumbura, which is the economic capital city. This includes the beach, which is popular with the tourists who visit the city. In addition to this, Lake Tanganyika is a popular tourist attraction.

18 Burundi is a home to wildlife, and unique cultural practices in East Africa. The Kibira National Park is a huge cover of forestland, and it houses a good number of animal species like chimpanzees, the cercopithecus monkey, baboons, and the colobus.

19 Ruvubu National Park is famous for its buffaloes and other animal species; while Rusizi Natural Reserve is known for its hippopotamuses, crocodiles, and antelopes.

20 The Bururi National Park is a nice place to explore hundreds of bird species in the African continent, together with the Vyanda Natural Reserve.

**Honourable, Excellencies, Distinguished Invited Guests, Dear participants, Ladies and Gentlemen;**

21 Time has come for greater action. The East African Community Partner States want to unlock the economy value in Tourism sector. To this effect, measures must be taken

to mitigate the effects of global climate change on tourism travel in order to foster a sustainable future in the industry.

22 It is within this framework that, the East African Legislative Assembly Committee on Agriculture, Tourism and Natural resources is undertaking various stakeholders' meetings in all the East African Community Partner States in order to deliberate on matters related to the performance of the tourism sector in the region, discuss on how to access development and address challenges facing the sector and the level of cooperation among the Partner States.

**Honourable, Excellencies, Distinguished Invited Guests, Dear participants Ladies and Gentlemen;**

23 Today's session will provide an opportunity for you as participants to debate and make appropriate observations and recommendations for the development of tourism in the Community.

24 To succeed in this process, there is need to involve all East African Community Stakeholders, including representatives of relevant Government Ministries, Members of the Committee Responsible for Tourism in the National Assembly, relevant Private Sector Operators in Tourism, and all Interested Stakeholders, to develop the Tourism sector.

25 It is our considered opinion that the rationale for tourism planning is three-fold: (i) One, developing and managing tourism in an integrated, controlled and sustainable way; (ii) Two, generating optimal benefits for the stakeholders; and (iii) Three, minimizing environmental and socio-cultural problems.

**Honourable, Excellencies, Distinguished Invited Guests, Dear Participants, Ladies and Gentlemen;**

261 note that there is really enough food for thought. And given the school of thought and expertise of the Participants, I have no doubt this Meeting will generate various contributions that are valuable enough to shape the policy direction on how we, East African People, must foster our interventions in the enhancement of the tourism sector.

271 wish to once again congratulate the EALA Committee on Agriculture, Tourism and Natural Resources for organizing these National Consultations which bring together stakeholders in the tourism sector to discuss on how to access development and as I said earlier, address the challenges facing the sector and the level of cooperation among the partner states in this area.

**Honourable, Excellencies, Distinguished Invited Guests, Dear participants, Ladies and Gentlemen;**

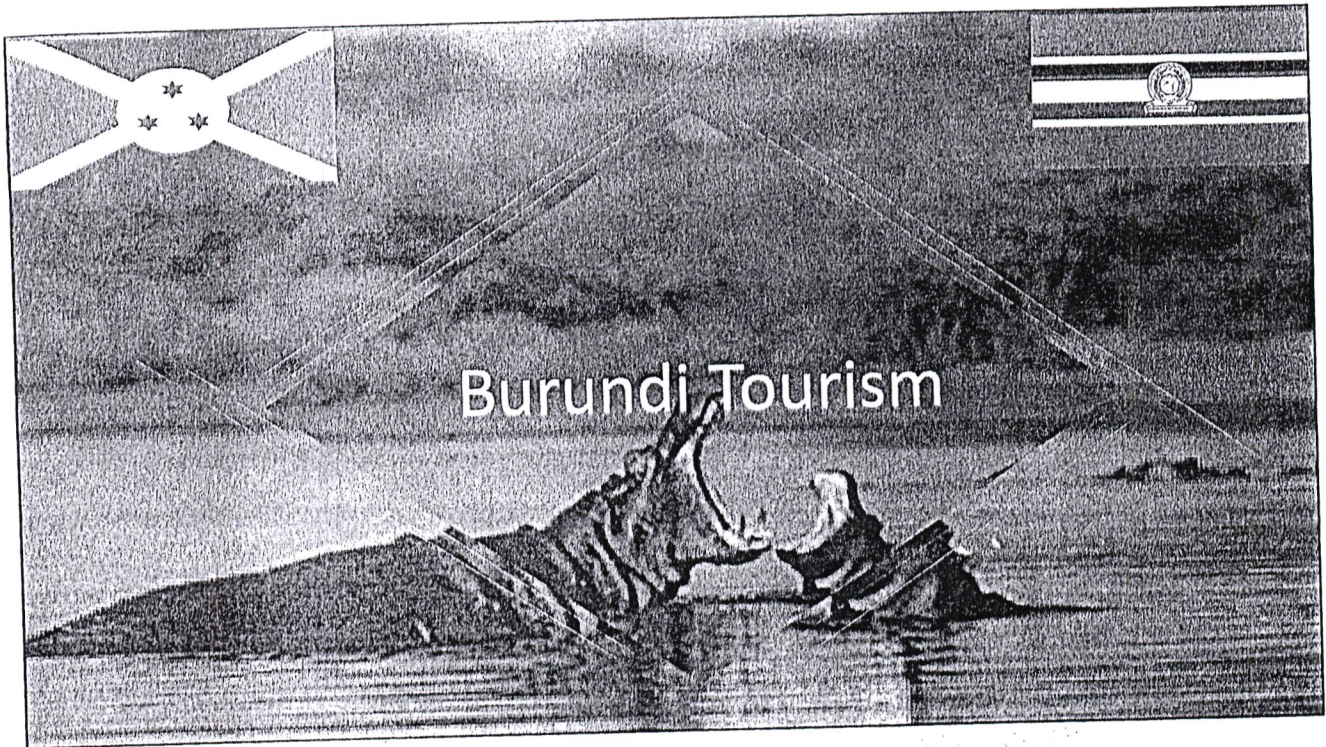
281 avail myself of the opportunity to reaffirm Burundi's commitment to East African Integration, and express our high appreciation of the East African Legislative Assembly spirit while we pledge our steadfast contribution to the realization of the objectives of the East African Community.

291 wish fruitful deliberations to the present National Consultations.

30It is with these few remarks that I declare the National Consultations on the Performance of the Tourism Sector in the East African Community, officially open.

**Long Live the Republic of Burundi!**  
**Long Live the East African Community!**


**Long live EALA**  
**Thank you very much,**  
**Merci beaucoup,**  
**Asante sana.-**



## Introduction

### Burundi, Heart of Africa

- Neighboring countries: Rwanda, Tanzania and RDC
- Area: 27,830 km<sup>2</sup>
- Population: 11.18 million
- Religion: Catholic, Protestant and Muslim
- Official language: Kirundi, Swahili, French and English

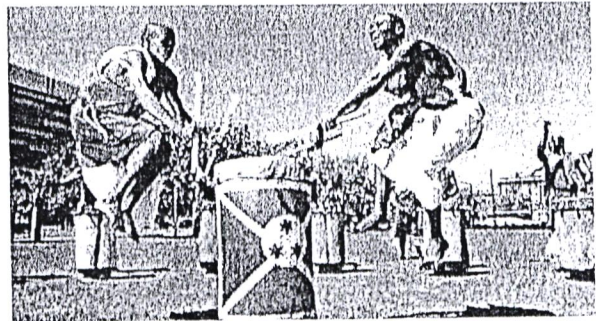


Legend

## Tourist attractions and potentialities available in Burundi.

- 123 tourist sites already identified in 2014

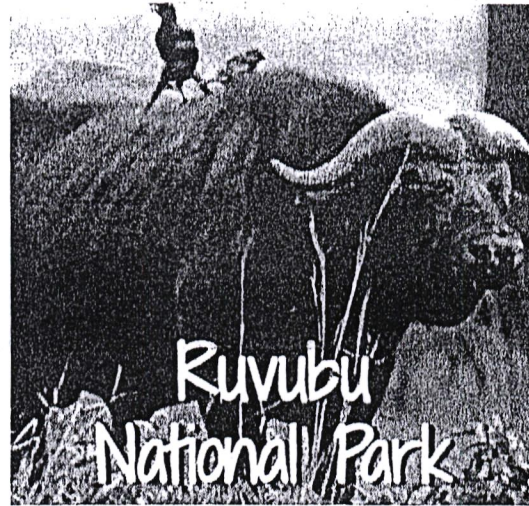
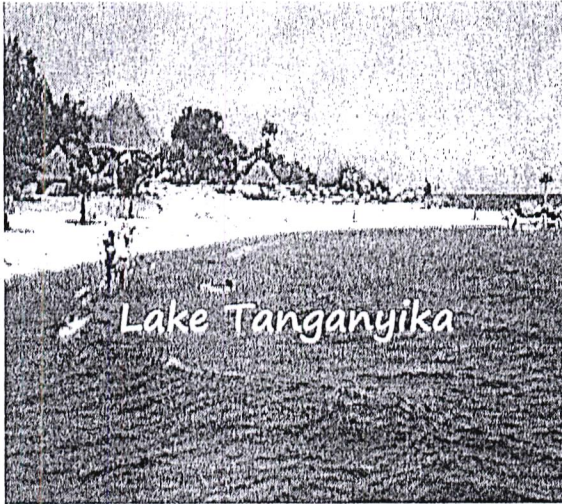
Type	Unit
Natural sites	56
Tangible cultural heritage	60
Intangible cultural heritage	3
Festivals and events	2
Human group	2
<b>Total</b>	<b>123</b>



### Burundi Culture

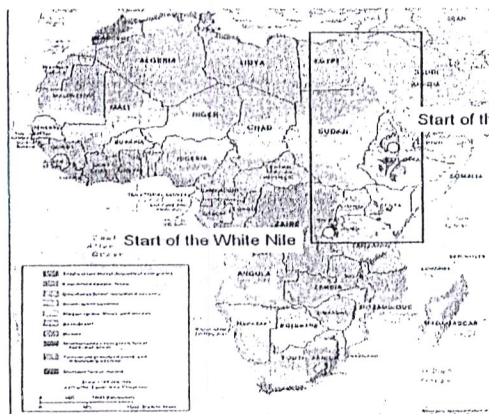
Country of sacred drums, UNESCO Heritage

## Tourist attractions

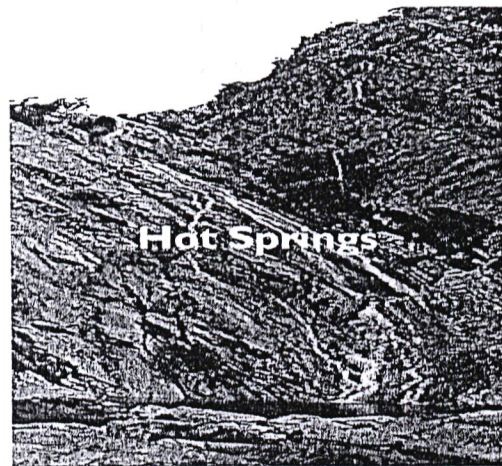


## Tourist attractions

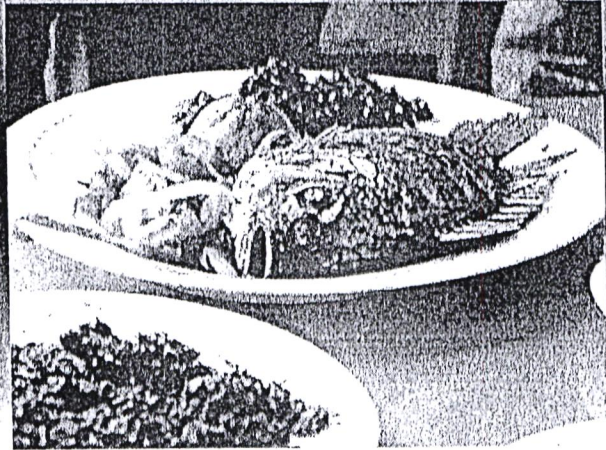
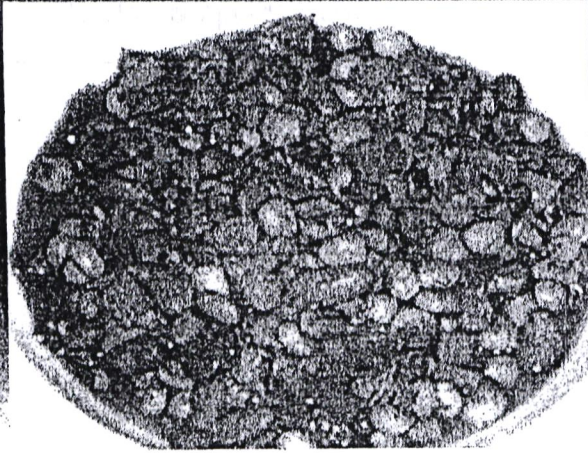
### White Nile source



### Start of the Blue Nile



# Gastronomy



Good Weather

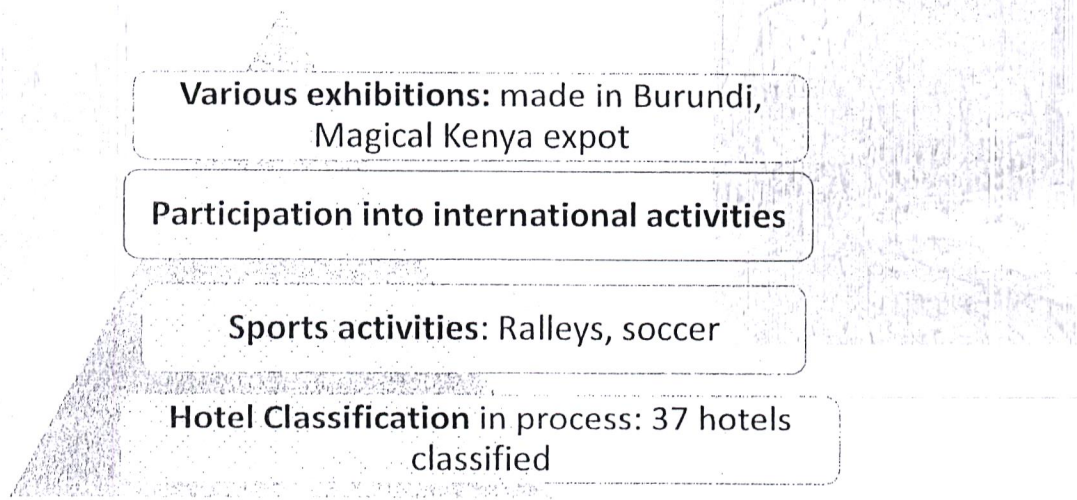
Country of rest

Unrolls covered

## Areas developed for the tourism activities in the partner states



## Types of major activities in Partner States and their contribution to the sector



### TOURIST ARRIVALS 2018



**Promotion of domestic tourism and its contribution to the sector**

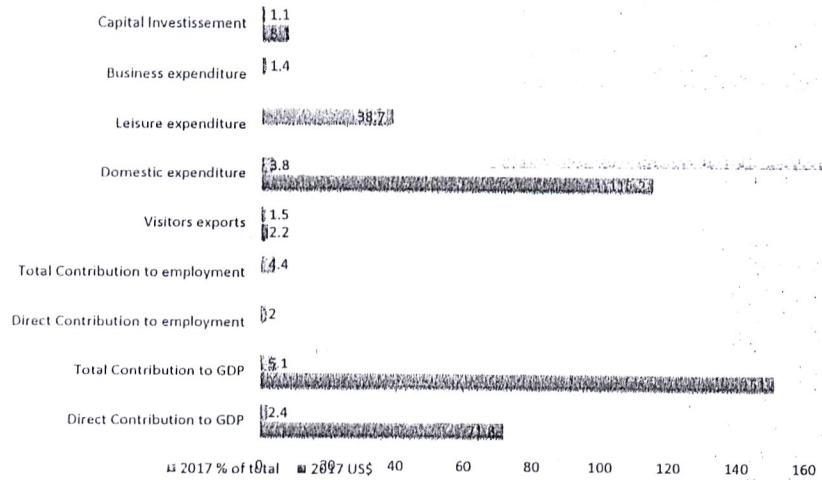
Rallies

Crusades

Local expositions: Christmas market

Communal Festival

### Macroeconomics indicators of international tourists



## Tourism Planning defined by The National strategy for sustainable tourism development

has the main objective of elaborating a program of priority actions for 10 years in order to contribute significantly to the economy and the consolidation of peace.



### Four Priorities actions

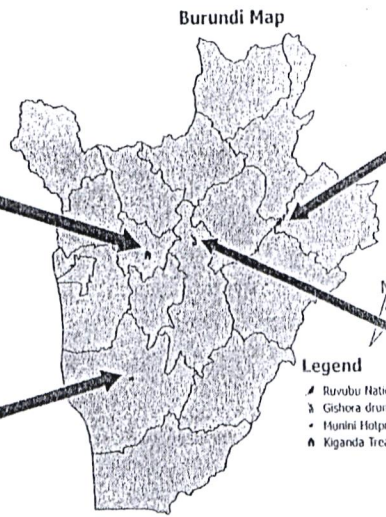
- 1. Establishment of a national strategy for sustainable tourism development (master plan) for 10years including a defined action plan for the implementation of the strategy
- 2. Formulation of a draft framework law and a regulatory framework for a harmonious development of the sector
- 3. Establishment of five pilot projects
- 4. Production of promotional materials on tourism in Burundi

### 3. Five pilot projects



1. Development of a feasibility study for the implementation of community based tourism Gishora Drummers

2. Development of a camping lodge near Munini Hot spring

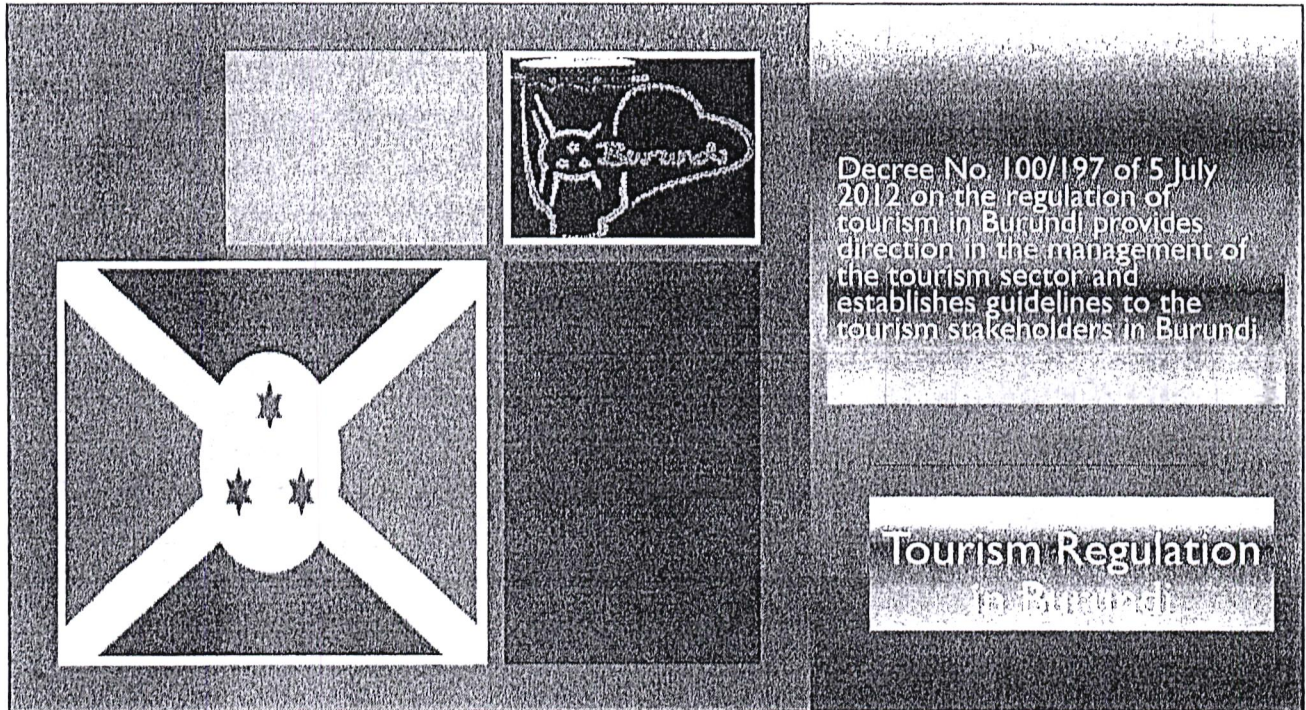


3. Development of a community based tourism Gishora Drummers

4. Development of a camping lodge near Munini Hot spring

Harmonization of national laws with laws of other partner States, including the protocol establishing the common market of the East African Community.

Tourism laws under development



Decree No. 100/197 of 5 July 2012 on the regulation of tourism in Burundi provides direction in the management of the tourism sector and establishes guidelines to the tourism stakeholders in Burundi.

Tourism Regulation in Burundi

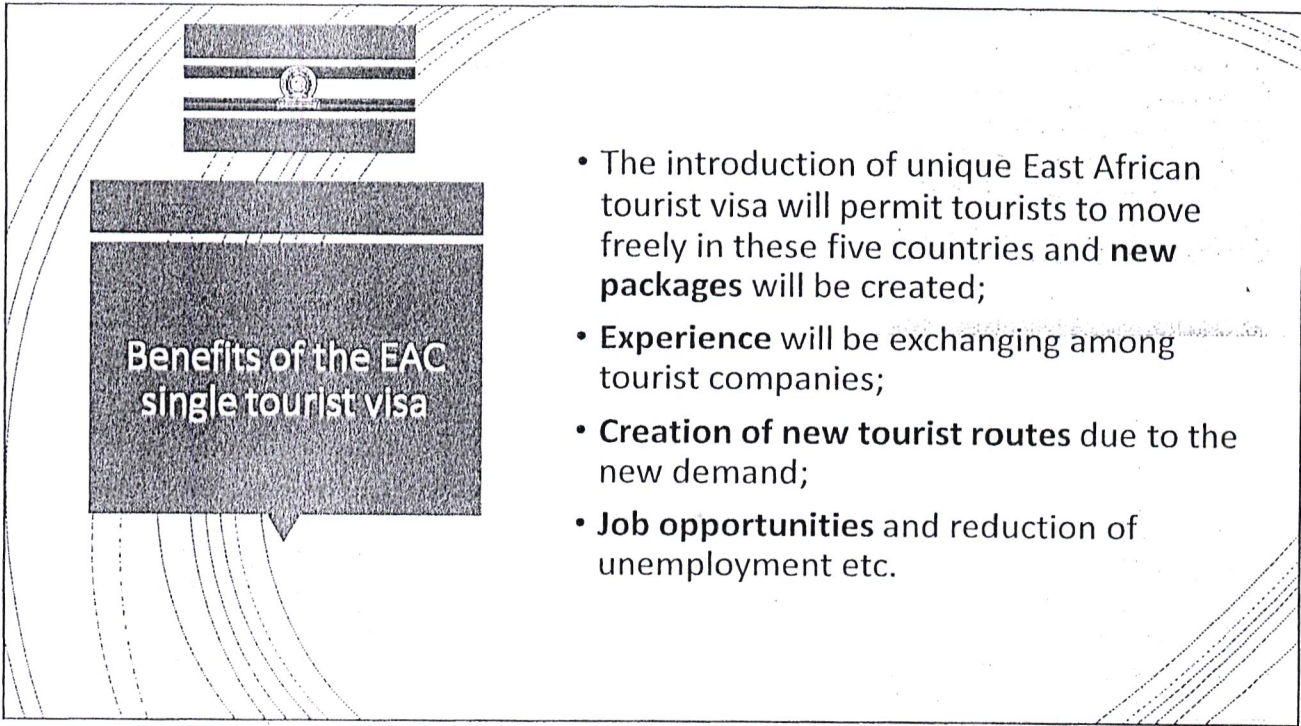


## Strategies to promote the EAC as a single common destination

- Stands at international fairs,
- Improvement of services provided in hotels through classification in accordance with EAC standards

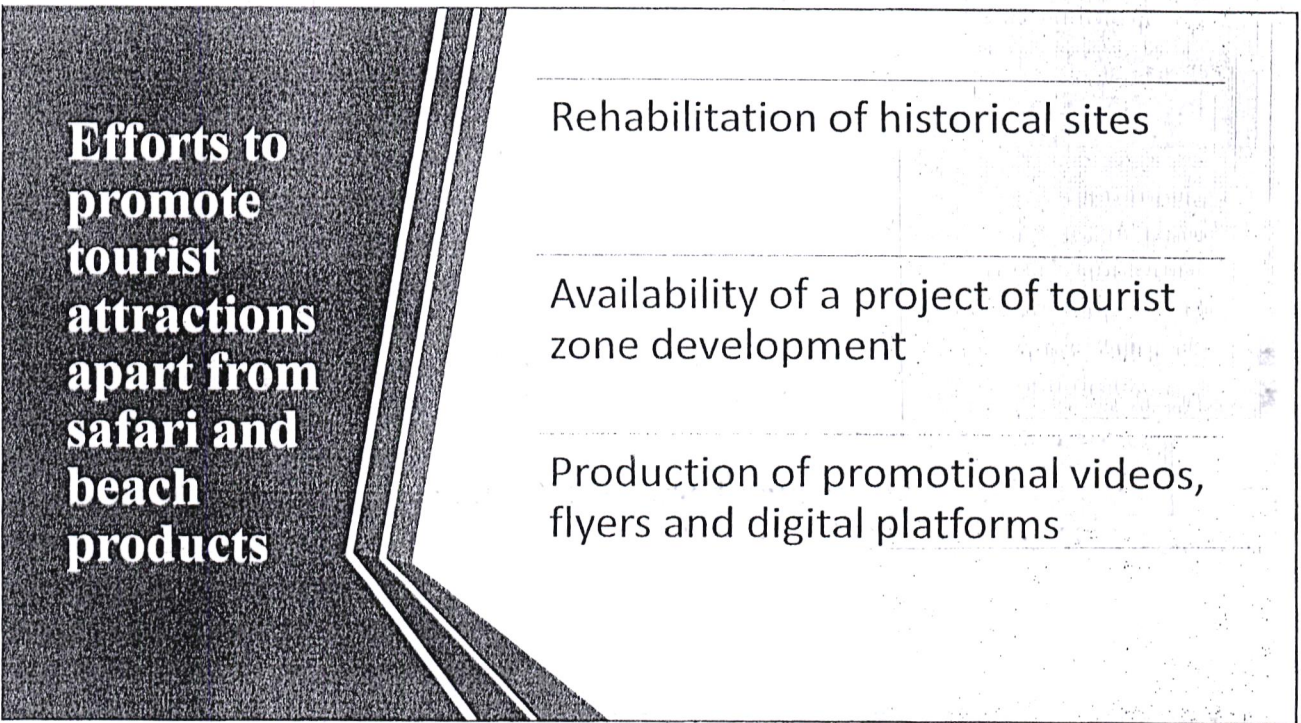
## Has the partner country already joined? When is membership fixed?

- **Accession of Burundi:** not yet, however, we have a joint ministerial order to facilitate the process signed by minister of EAC affairs and the Minister of Finance
- **When will become the membership?** EAC ministerial meeting to decide what to do next for Burundi



**Benefits of the EAC single tourist visa**

- The introduction of unique East African tourist visa will permit tourists to move freely in these five countries and **new packages** will be created;
- **Experience** will be exchanging among tourist companies;
- **Creation of new tourist routes** due to the new demand;
- **Job opportunities** and reduction of unemployment etc.



**Efforts to promote tourist attractions apart from safari and beach products**

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Rehabilitation of historical sites

---

Availability of a project of tourist zone development

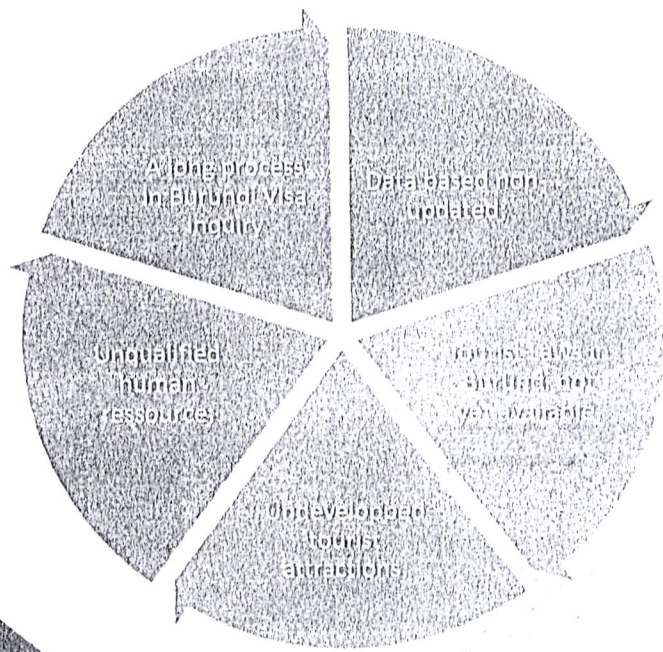
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Production of promotional videos, flyers and digital platforms

### Cooperation of tour operators with their counterparts in other countries

- EATP: East Africa Tourist Platform;
- There is the cooperation between Burundi tour operators with others but unfortunately it is weak and informal
- There is no cooperation between Burundi Tourist Board and others from EAC states

### Challenges facing the tourism sector



**Available training institutions for training and development of human resources for the sector and their capacities**

**In 2018, Burundi accounted:**

- five High School with the course of Hospitality and Tourism where 1660 students\_ 31% males and 69% females,
- 2 universities with 380 students\_ 43% males and 57% females.





MINISTRY OF TOURISM AND WILDLIFE  
STATE DEPARTMENT OF TOURISM

## PERFORMANCE OF TOURISM SECTOR IN THE REGION(EALA MEETING) 10/9/2019-LAICO REGENCY

### INTRODUCTION

The Mandate of the Ministry of Tourism and Wildlife as derived from the Executive Order No. 1 of June 2018 on Organisation of the Government of the Republic of Kenya is:

- Tourism Policy and Standards
- Coordination, Implementation and review of tourism and wildlife legislation
- Wildlife Conservation and Protection and management
- Management of National Parks, Reserves and Marine Parks
- Tourism Investment
- Tourism and Wildlife Training and Research

## Ministry mandate cont.

- Tourism resource mobilisation
- Crisis management
- Tourism product development
- Tourism marketing and promotion
- Wildlife Biodiversity Management and Protection
- Collaboration with Wildlife Clubs of Kenya
- Management of Wildlife Dispersal Areas in collaboration with Partners

## Vision and Mission

### Vision

- A vibrant and innovative tourism industry supported by sustainable wildlife resources

### Mission

- To facilitate good governance for sustainable development, management and marketing of tourism and wildlife

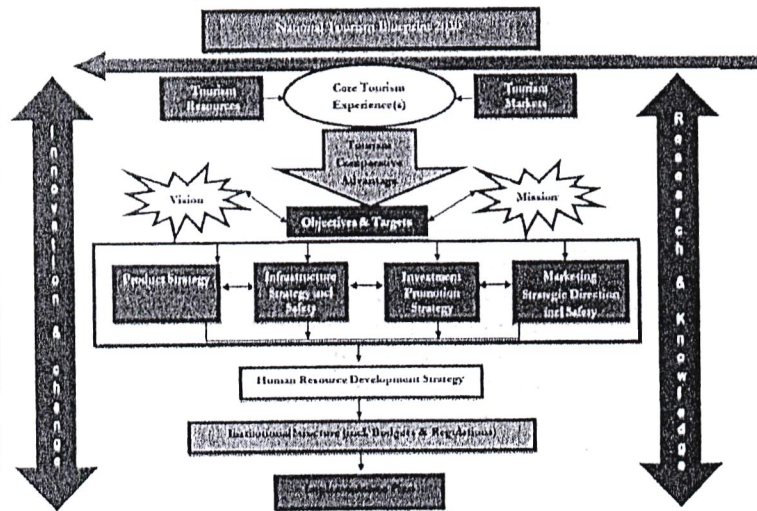


### (c) Strategic Objectives

- To promote product development through Innovation and Change
- To market Kenya as a tourism destination of choice
- To develop infrastructure that facilitates tourism
- To Enhance conservation and management of wildlife and biodiversity resources for sustainable dev.



### Strategic Areas of Tourism Development

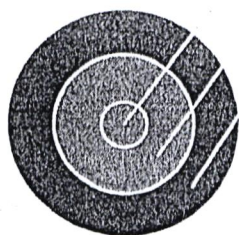


## Areas Developed for Tourism Activities

- Jomo Kenyatta International Airport (JKIA)
- Standard Gauge Railway
- Kenyatta International Convention Centre
- Circuit Priority Roads
- Mombasa Waterfronts
- Bomas of Kenya
- Kaya Forest for Cultural Conservation
- National Parks and Reserves



## Major Tourism Activities and Contribution



Holiday travel- 68%

Business travel- 18%

Transit-14%



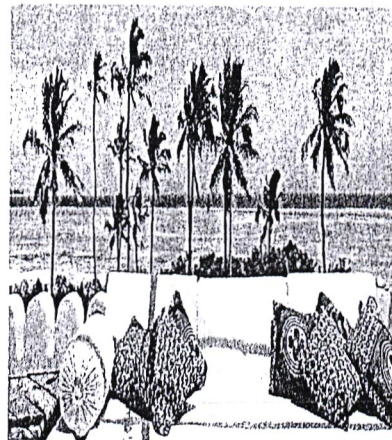
# Tourism Arrivals

- The tourism sector registered improved performance in 2018 mainly attributed to:
  - growth in aviation,
  - investor confidence and withdrawal of travel advisories.
  - visits by foreign dignitaries
  - revitalized marketing effort.
- Tourism earnings increased by 31.3 per cent to KSh 157.4 billion in 2018. The number of international arrivals increased by 14.0% to 2.027 million in 2018.



## 2019 Regional markets performance

- Regional markets performance in comparison with first half year 2018
  - Half Year (HY1) 2019- 921,090
  - Half Year (HY1) 2018- 927,797
  - Decline by: 5,707 tourists
  - 0.723% decline



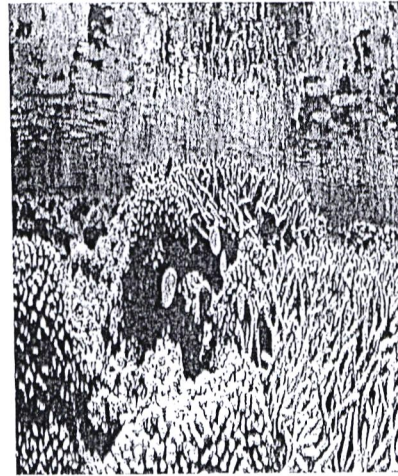
## Domestic Tourism in Kenya

-2018 Domestic  
Bednights-3,974,243

-Kenyan's to travel locally  
especially during low  
seasons.

### Contribution to the Sector

- 10% Employment.
- Government revenue.
- Trickle down effect  
through local  
businesses.



## Contribution of Tourism Sector to Economic Growth

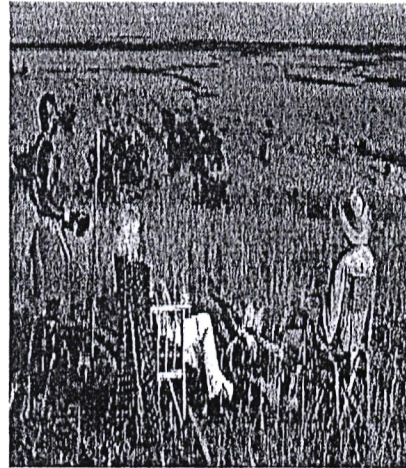
Travel and Tourism in Kenya grew faster than the regional average and significantly above other economies in Sub-Saharan Africa (WTTC)

- Combined with domestic spending, Travel & Tourism supported 8.8% of the nation's GDP in 2018.
- Travel & Tourism is responsible for 8.3% of all Kenya's employment (1.1 million jobs).
- GDP contribution is projected to grow by 5.9% in 2019.
- International tourists spent over Kshs 157 billion accounting for over 15% of total export earnings.



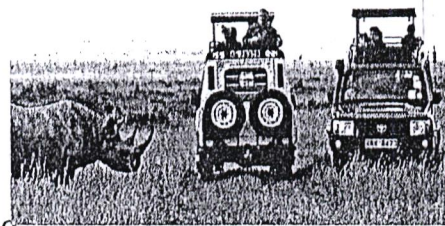
## Strategies to Develop the Tourism Sector

- Dev. of tourism policies that support expansion of the tourism sector.
- Charter incentives to enhance travel.
- Improving tourism infrastructure.
- Engaging with the counties to identify, dev. and package cultural experiences.
- Strengthening stakeholder engagement.
- Training and capacity building.
- Dev. of business and conference facilities.



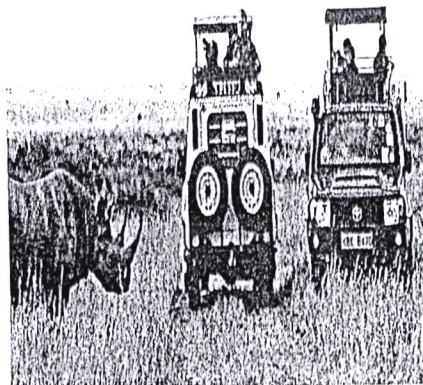
## Strategies to Promote EAC as a Single Tourism Destination

- Collectively **promoting** and marketing the Community as a single region.
- Common criteria for classification of tourist accommodation establishments and restaurants.
- Regional Strategy to Combat Poaching and Illegal Trade and Trafficking of Wildlife and Wildlife Products.



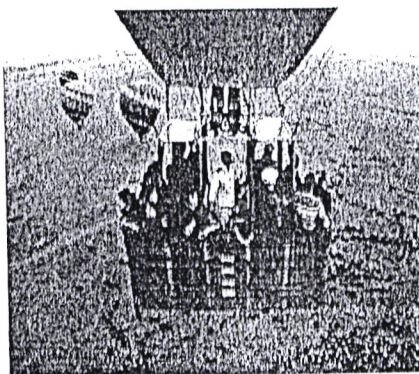
## Strategies cont.

- Preferential entry fees and accommodation tariffs for East African Citizens within the region.
- Implementation of Common Market Protocol and significant removal of non-tariff barriers to trade.
- Dev. of the EAC International e-passport.



## Benefits of the EAC Single Visa

- Widening and deepening co-operation among the Partner States in the political, economic and social fields for their mutual **benefit**.
- East African citizens may freely travel from **one EAC** state to another.
- Partner States such as Kenya and Burundi have started issuing the passport.



## DIVERSIFICATION OF TOURISM PRODUCTS

- Kenya is making every effort to diversify its tourism offer.
- There is need to transform the sector by redefining the safari to include walks, adventure activities, volunteering, culture, history, and culinary experiences.
- There is also a growing concern to promote business travel as well as city tourism.



## Non-Tariff Barriers within the Partner State and from other Partner States

- The existence of non-tariff barriers (NTBs) affects tourists flows, and reduces the benefits to be gained from the regional integration process.

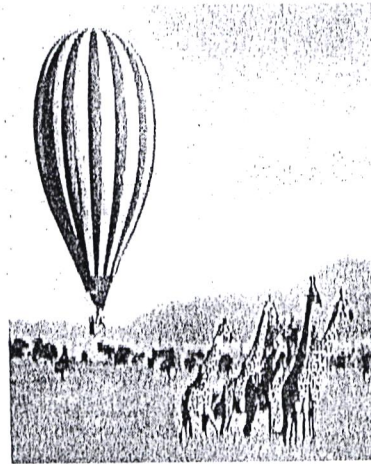


## Challenges facing the Tourism Sector

-Globalization is leading the creation of uniform standards and protocols.

-Tourism is one of the most taxed sectors.

-Tourism and travel marketing can sometimes be deemed by visitors as inadequate, false, or exaggerated. Marketing entities must work towards developing innovative marketing solutions to lure the new crop of travelers who are much informed.



## Challenges Cont.

-Tourism infrastructure in many locations is outdated and underdeveloped.

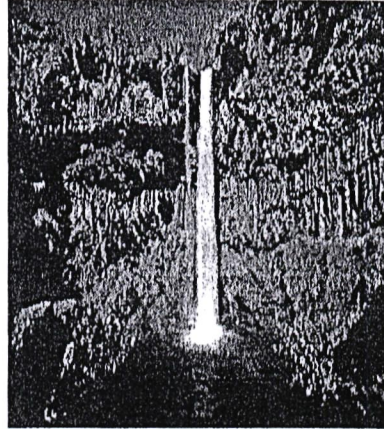
-Cooperation of tour operators/shared resources

-Insecurity and destination crimes.



## What should be done by the community/EALA

- EALA push for implementation of signed agreements/protocols/strategies
- Training and capacity building
- Enhanced development and promotion of shared attractions
- Branding of the region

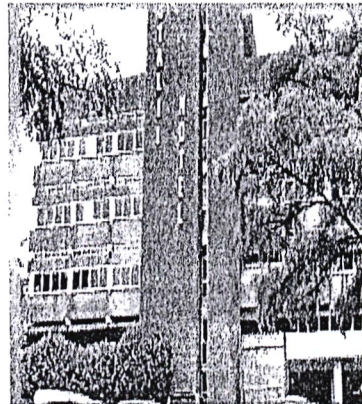


## Training Institutions and Dev. Human Resources

-Kenya Utalii College (KUC) is a leading African hospitality and tourism training institution.

-The College has trained over 60,000 graduates from around the world who continue to serve in the local and international hospitality and tourism industry.

-KUC is distinguished for providing world class training for both the local and international hospitality and tourism industry.



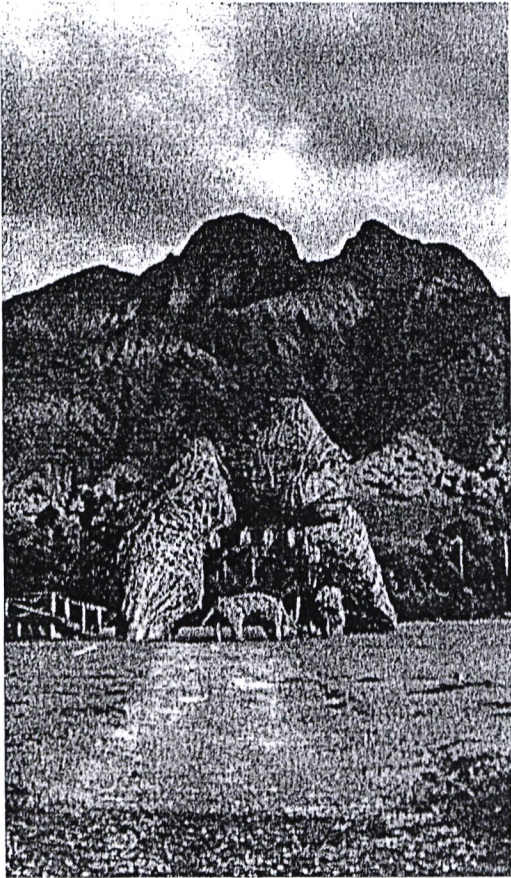




**RDB** RWANDA  
DEVELOPMENT BOARD

# Stimulating Rwanda's Tourism Growth

2019



## ➤ Rwanda at a glance

Mission & Vision

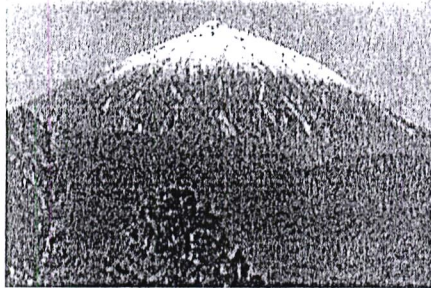
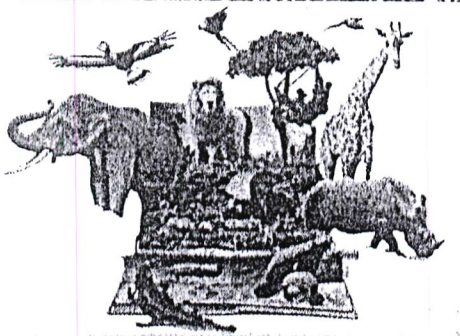
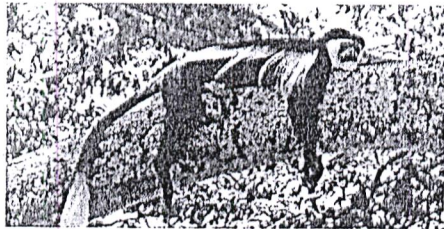
What makes Rwanda Remarkable

The tourism industry in Rwanda: a booming sector

Key facts on Rwanda Tourism

Sector Developments

Towards Vision 2024

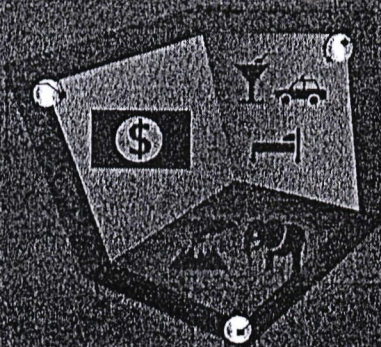


## Rwanda's tourism highlights

Tourism In Rwanda



Increase Tourism receipts in a sustainable manner



Increase participation of the private sector in driving the tourism growth

Conserve the biodiversity inside the protected areas for the benefits of future generations

- 14 species of primates
- 4,507m to top of the highest volcano - Mt. Karisimbi
- Home to the 1 and only canopy walkway in East Africa
- 4,000+ hectares of bamboo forest
- 1,000+ hills
- 700+ bird species
- 1,501+ animal species

## WHAT MAKES RWANDA MARKABLE?

#1 Safest country in Africa  
(WEF-2018)

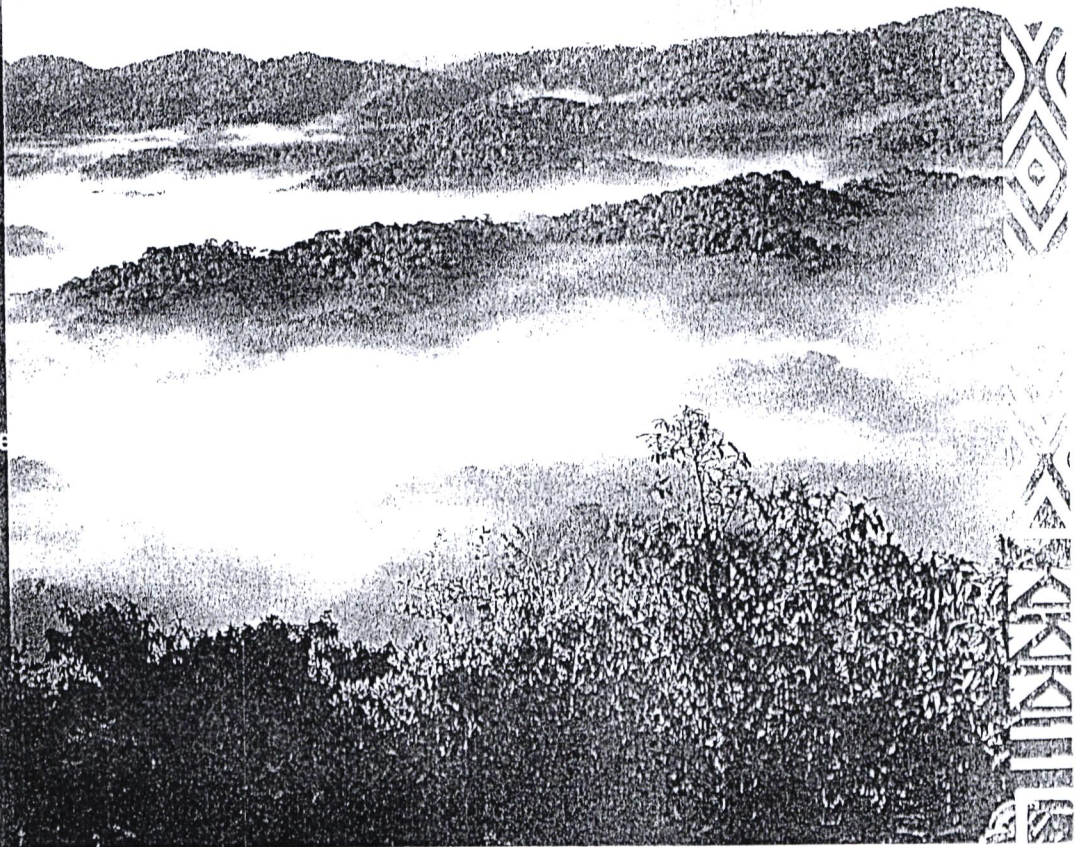
#5 Safest country in the world  
(WEF-2018)

Kigali is one of the cleanest cities in the  
world

Connectivity

2<sup>nd</sup> easiest place to do business in  
Africa

Helicopter transportation available -  
Akagera Aviation



## WHAT MAKES RWANDA REMARKABLE?

14 species of primates

Home to 700 bird species

Adventure

National Parks

Cultural Heritage Corridor

Community Based Tourism

Conservation



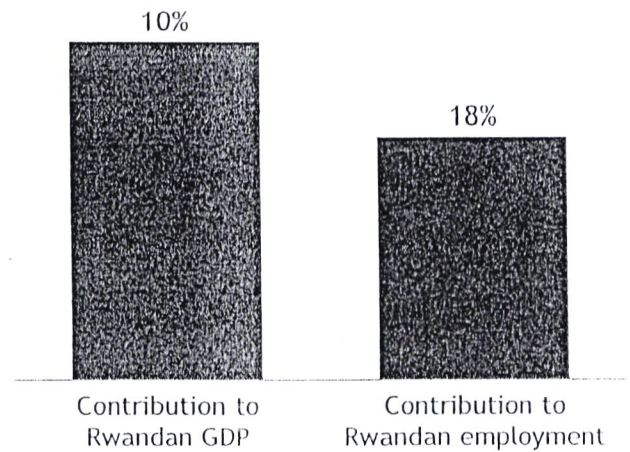
## The tourism industry is a strategic priority for the Government of Rwanda...

- ✓ Central to the realization of the country's Vision 2024 and a major force for the eradication of poverty
- ✓ Fundamental for the transformation and modernization of the national economy
- ✓ Rwanda's primary source of foreign currency

Source: UNCTAD, WTTC, Vision 2020 expert Interviews

## ...and plays a major role in the country's economy

Total contribution of Tourism industry



# Tourism in macro economy

3%



GDP  
Direct  
Contribution

10%



GDP  
Indirect  
Contribution

18%



Employment  
90,000 Jobs in the tourism contributing to  
18% of off-farm job, second after retail  
trade

29%



BoP  
tourism over export of  
good and services

59%



BoP  
Tourism over  
service export

19%



GCF  
25% of Gross capital  
formation are in tourism

# Tourism policy

- Over-reliance on a single tourism product
  - Bad international awareness and perceptions
  - Low capacity and unskilled human resources
  - Little or no awareness of tourism in local SMEs
  - Underdeveloped regulatory framework for the tourism sector
  - Constraints due to quality and quantity of infrastructure
  - Complexity of accessing land for tourism investments
  - Controversy on the environment and sustainability
  - Low availability of finance and capital markets for private sector investment in the sector
- CONSTRAINTS**

- Product diversification
  - International tourism fairs, fam trip, roadshows
  - Establish tourism schools (RTUC, AKIAT, WDA)
  - Revenue sharing, BDF
  - Establish regulator framework, tourism bill
  - Roads, hotels construction and improvements
  - Land ownership reform
  - Establishment of Environmental authorities and Environmental acts
  - Government prioritize tourism sector for financial
- SOLUTIONS**

- Leading foreign Exchange earner since 2007;
- Tourism and conservation Laws and Policies approved; Concession policy, Compensation law, Wildlife Policy and Tourism law are in place;
- New Tourism Products developed out of the protected areas (Congo Nile Trail, Water Sports, ...)
- Rwanda Convention Bureau has been established for the promotion of the MICE tourism in Rwanda
- Bird watching developed in and outside of the National Parks (Birding routes were established in Bugesera, Nyabihu, Gicumbi and around Rugezi swamp)
- Rwanda Film Office Established
- Strategic Partnership; Visit Rwanda - Arsenal, Alibaba Group

## Key Facts about Rwanda Tourism & Conservation

# Tourism Plan

## Access/ Marketing

- Unlock the country
- Aggressive and proactive marketing

## Tourism Products

- Products Diversification

## Quality

- Quality Infrastructure
- Tourism law, grading, licensing and levy





# Over the past decade, Rwanda has achieved remarkable progress and development in the tourism sector...



## 2018 achievement

**1,700,000**  
total visitor arrivals

**US\$374,000,000**  
Revenues

**14,000**  
hotel rooms

**170**  
flights per week

Source: RDB Tourism



## New tourist sites developed/in development since 2016

### Already up and running ...

- 2016 Amakoro Songa Lodge
- 2016 Five Volcanoes
- 2017 Wilderness Bisate Lodge
- 2017 Singita Kwitonda Lodge Groundbreaking
- 2017 Gihaya Island, Rusizi District resort hotel
- 2018 One and Only Nyungwe House refurbishment
- 2019 One and Only Gorilla Nest Lodge and Golf Resort
- 2019 Magashi by Wilderness Safaris

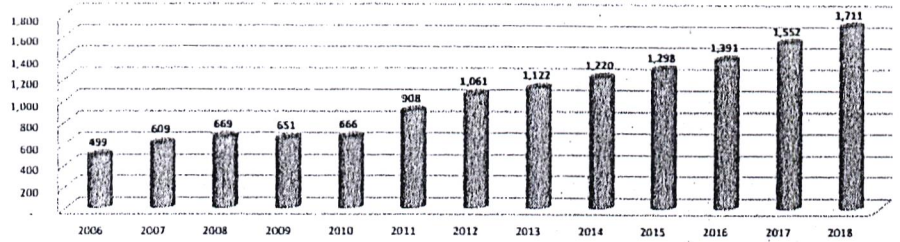


How far we have  
come

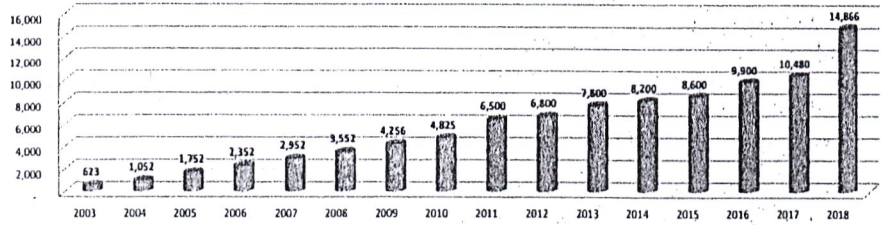
Arrivals Growth Past 7 years	Total Leisure		
		114%	34%
		2010	2018
Total Visitor arrivals '000		666	1,7
Leisure arrivals '000		97	161
MICE arrivals '000		12	38
Parks visits '000		45,4	94
Park revenues US \$ millions		9,4	19,8
# Flights per week		86	167
# Hotel rooms		4,700	14,866

**Tourism trends:**  
 39% of visitors are from EAC countries;  
 from 2010, average annual growth 12%

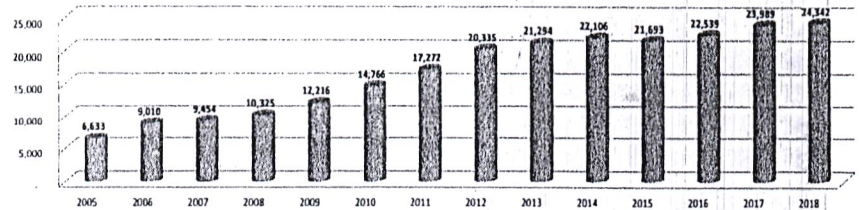
Visitor arrivals in 000'




Number of Accommodation rooms



Number of flights





**Harmonization  
with EAC Treaty -  
Cooperation in  
Tourism**

As stated in article 115 of the EAC Treaty the following have been implemented:


1. Co-ordinate policies in the tourism industry and undertake to establish a framework of co-operation in the sector that will ensure equitable distribution of benefits. - National tourism policy adopted and implemented
2. Establish a common code of conduct for private and public tour and travel operators, standardise hotel classifications and harmonise the professional standards of agents in the tourism and travel industry within the Community. - Rwanda adopted a tourism law on licensing tourism entities and grading of accommodation establishments
3. Develop a regional strategy for tourism promotion whereby individual efforts are reinforced by regional action - EAC Tourism marketing strategy in advanced stage.

# Tourism & Accessibility





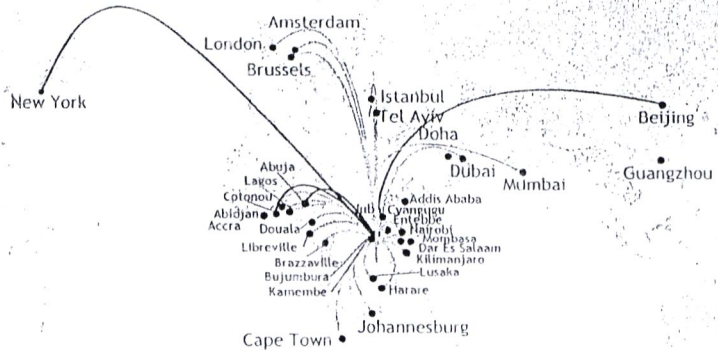
# Rwanda is increasingly open & connected to the world, supporting continuous growth in tourists arrivals...

 Rwanda: open to the world

#3 for visa openness in Africa



- 1h25 to Nairobi
- 3h50 to Johannesburg
- 6h40 to Doha
- 7h00 to Mumbai
- 10h05 to London

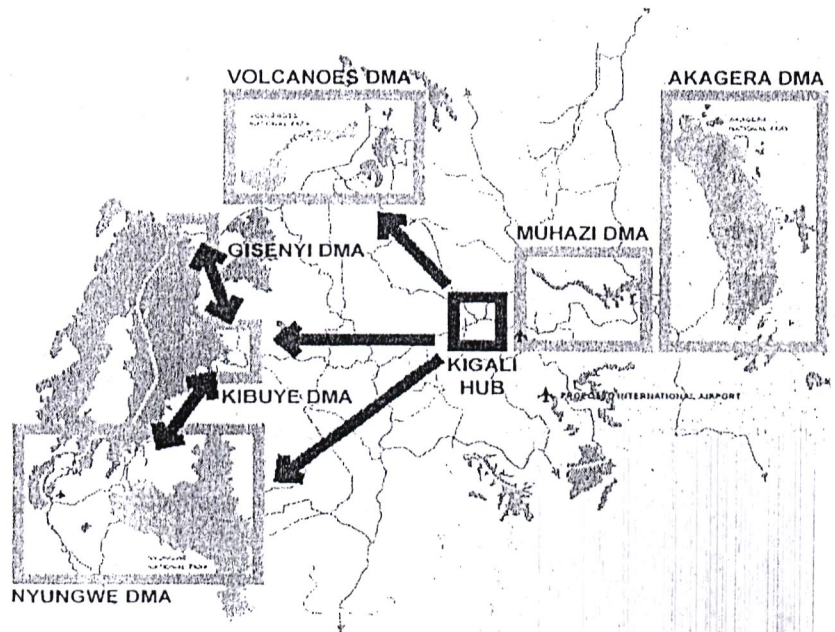


..... Existing direct connections to Kigali  
 — Planned direct connections to Kigali

Source: Rwanda Civil Aviation Authority, Expedia

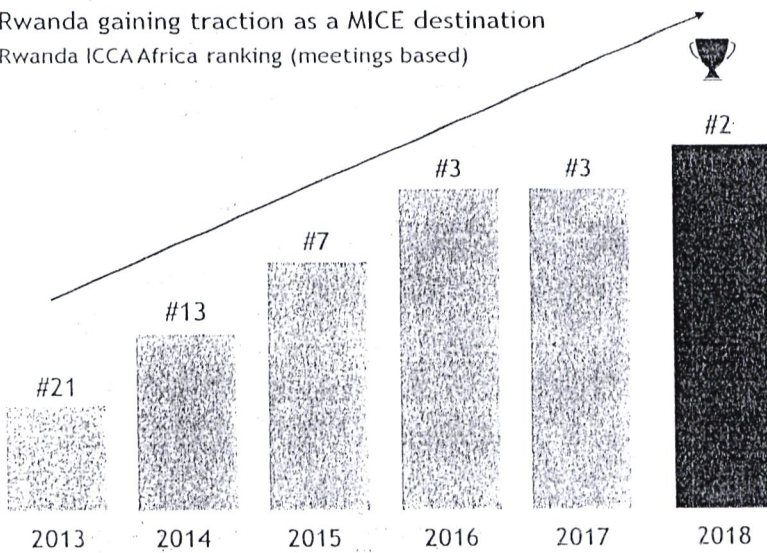


Tourism master plan put emphasis on priority areas and product diversification. Priority areas for tourism development known as Destination Management Areas (DMAs) were designated. The products which both anchor and integrate the development areas are corridors




...as well as the rise of Kigali as a major MICE destination...

Rwanda gaining traction as a MICE destination  
Rwanda ICCA Africa ranking (meetings based)












Source: International Congress and Convention Association report 2018

Tourism In Rwanda 

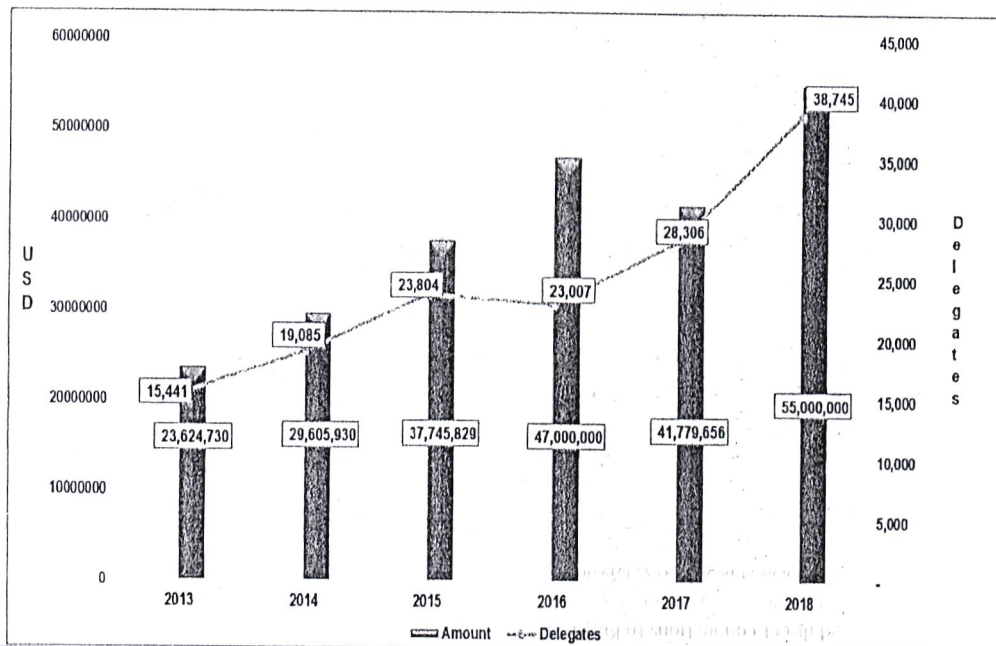
## ...hosting many African and global events

Selection

### Recent events held in Kigali

2017	 World Economic Forum on Africa
	 Forum for Agriculture Research In Africa
	 The Global Africa Investment Summit
	 Meeting of the Partners to the Montreal Protocol
	 Africa Carbon Forum
2018	 African Union Summit
	 Transform Africa Summit
2019	 CEO Forum
	 Transform Africa Summit

# MICE



- An increase of 37 % in number of delegates from 2017 to 2018. A 103% increase from 2014 to 2018.
- A 31% increase in economic contribution 2017 to 2018. A 86 % increase in revenues from 2014 to 2018.

# Tourism Regulatory Framework

## LICENSING

All tourism entities are required to have a tourism license to operate

## GRADING

- While tour operators, guides and travel agents will not be subject to grading, hotels and restaurants will be graded every two years
- A list of licensed and graded entities will be published annually on RDB's website

## INSPECTION

Licensed entities are subject to regular and ad-hoc inspections

## LEVY & CONCESSION

A 2% tourism development levy will be collected from consumers on accommodation and restaurant services. RDB will set entrance fees to national parks, but concessionaires will set rates for their services.

## REPORTING

All licensed entities are required to submit reports to RDB. Tour operators, guides and travel agents shall submit quarterly reports on:  
Number of clients/month  
Nationalities  
Length of stay

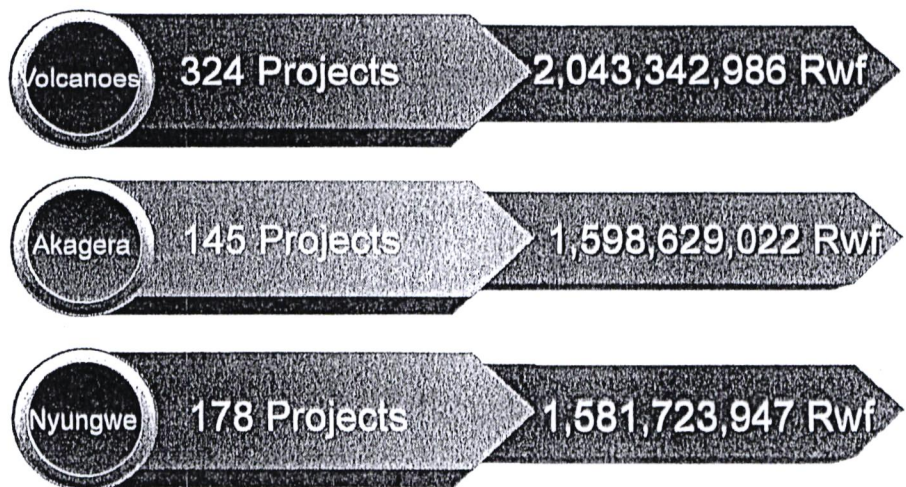


## Sector Development

- **Expanded Air Access**
  - ✓ RwandAir - expansion to 24 destinations with 7 additional routes planned
  - ✓ RwandAir - +1 million carrying capacity per annum
  - ✓ RwandAir | Benin partnership - air transport hub for West Africa
  - ✓ Six other airlines operating at KIA (Ethiopian, Qatar, Turkish, KLM, Brussels, Kenya)
- **Enabling Tourism Business Environment**
  - ✓ Improved visa regime for visitors - visa on arrival for all visitors
  - ✓ Licensing for tourism businesses
- **Conservation Milestones**
  - ✓ Fencing and reintroduction of lions / rhino in Akagera National Park
  - ✓ Gishwati - Mukura National Park gazetted in 2016
  - ✓ Decrease in poaching though increased patrols, equipment and training
  - ✓ Community revenue sharing contribution doubled to 10% in 2017
  - ✓ Compensation for damages caused by wildlife - law implemented
  - ✓ Transboundary collaboration treaty - Greater Virunga signed
- **Product Development Milestones**
  - ✓ Kivu Belt project - Transactional Advisor services appointed
  - ✓ Cultural Village, Kigali - phase one construction
  - ✓ Rwanda Film Office to be established

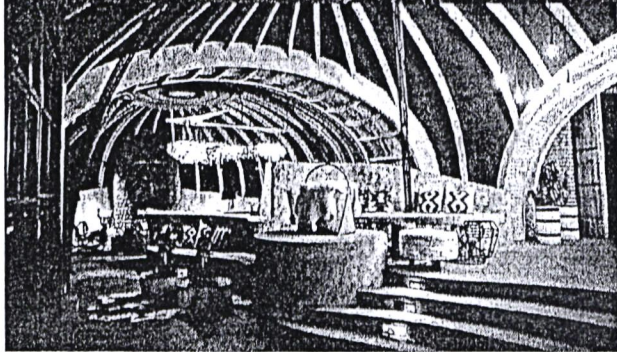
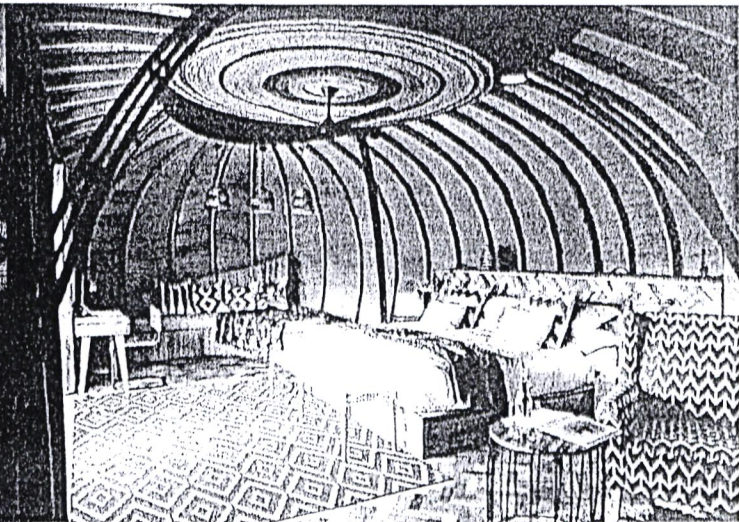
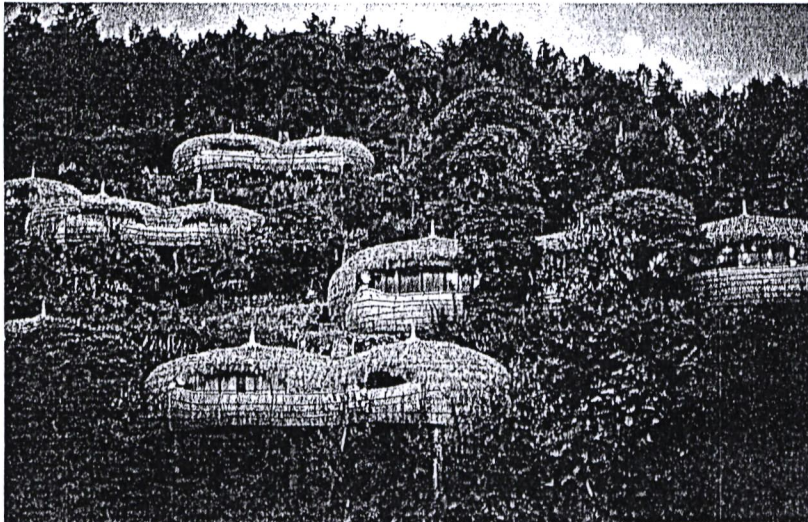
**Revenue Sharing:  
From 5% to 10%**

42 Sectors within 12 Districts surrounding the national parks benefited tourism revenues through 647 projects worth 5, 223,699,990 Rwf



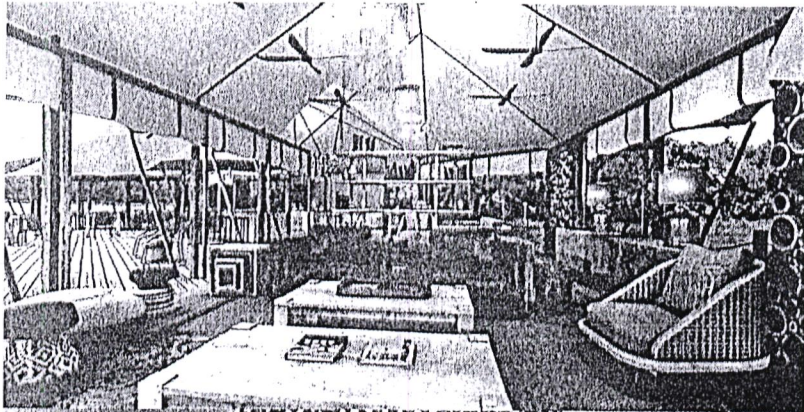


*One&Only*  
GORILLA'S NEST  
Rwanda



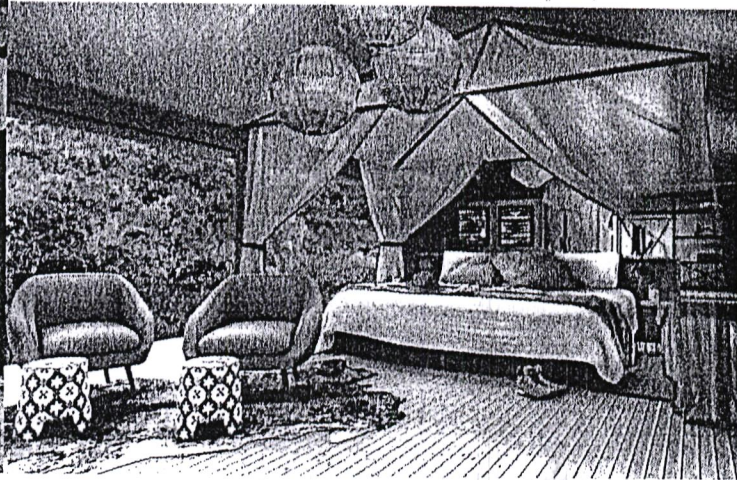
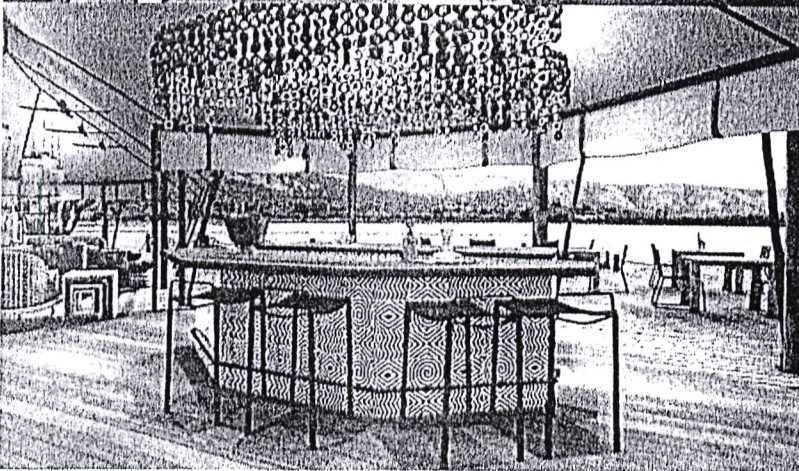
## BISATE LODGE

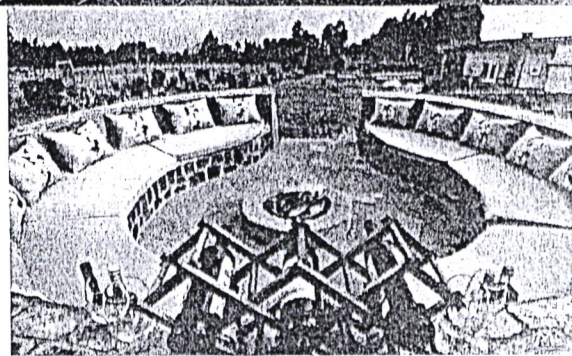
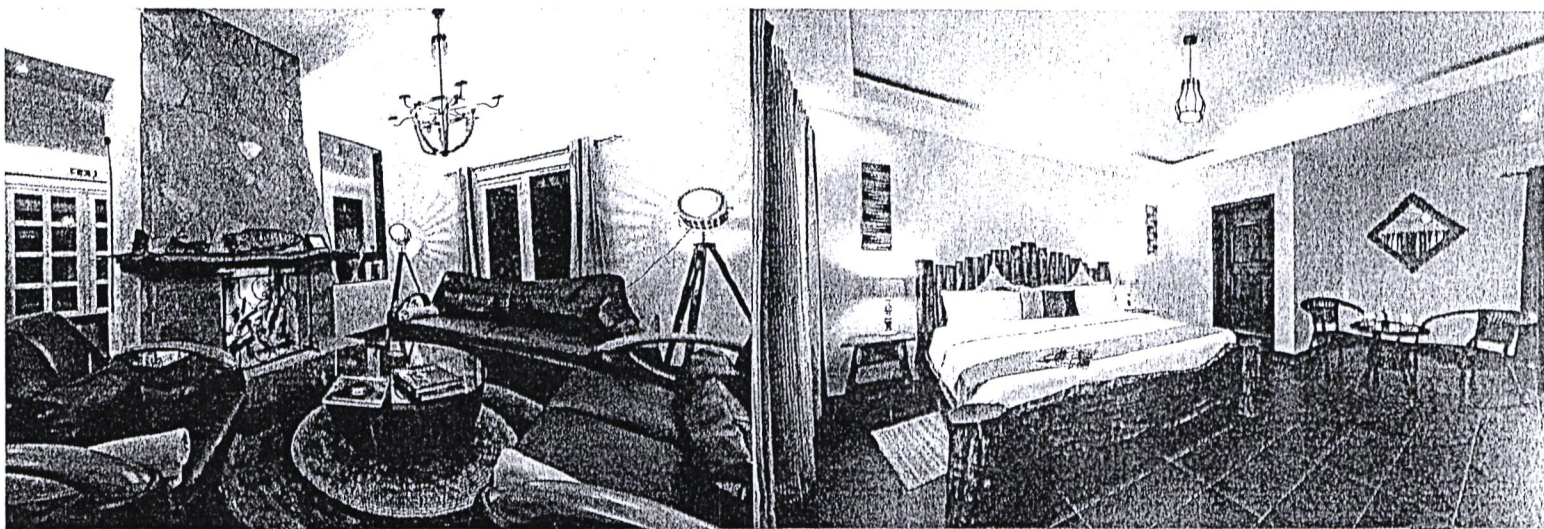
  
WILDERNESS  
SAFARIS



# MAGASHI TENTED CAMP

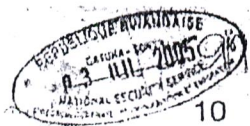
  
WILDERNESS  
SAFARIS





# ...through a strong set of incentives, an exciting product offering and unique natural advantages

## Global visa free regime...



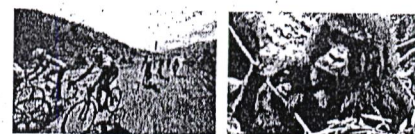
Global visa free regime since January 2018  
- visa on arrival for all

## ...supportive ecosystem...



Network of international standard hotels and increasing air connectivity

## ...exciting sites & activities

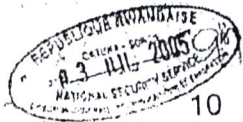
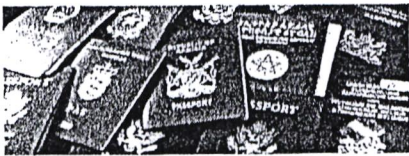


From natural sites (e.g. gorilla visits) to cultural and adventure activities (e.g. cycling)



# ...through a strong set of incentives, an exciting product offering and unique natural advantages

## Global visa free regime...



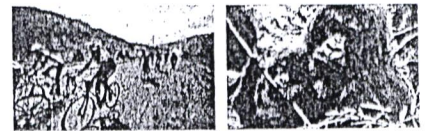
Global visa free regime since January 2018 - visa on arrival for all

## ...supportive ecosystem...



Network of international standard hotels and increasing air connectivity

## ...exciting sites & activities



From natural sites (e.g. gorilla visits) to cultural and adventure activities (e.g. cycling)



Going forward, Rwanda's strategic objective is to double tourism revenues by 2024

Source: National Strategy for Transformation

## Strategic priorities for the Government of Rwanda



Grow investments in tourism infrastructure, including development of the Kivu Belt



Position Rwanda as a world-class high-end ecotourism destination



Build the capacity of the private sector to provide first-rate levels of service delivery



Accelerate growth of MICE tourism revenues

## Towards NST1 - Vision 2024

« **National brand development**  
Strengthen Rwanda's international image perception

» **Innovative tourism marketing and promotion**

Digital marketing and international trade fairs  
Media familiarization visits | editorial coverage | documentaries  
Promote Rwanda as a film destination

» **Stakeholder engagement**

Grow the industry collectively - through Investor Open Days, Leisure and MICE Quarterly forums  
Proactive focused MICE sales and bidding  
Focus on Adventure tourism (cycling, paragliding)  
Grow birding and other niche markets (e.g. Liberation Tours, orchid trails in Nyungwe)

» **Conservation**

National Parks habitat restoration and expansion projects  
Enhanced trans-boundary relationships for protected areas  
Completion of Wildlife Protection legislation



**IRDB** | RWANDA  
DEVELOPMENT BOARD

DISCOVER  
REMARKABLE  
RWANDA

THE HEART OF  
AFRICA

**VISIT  
RWANDA**

1000-1000-1000  
1000-1000-1000

# Performance of the Tourism Sector in Uganda

1

By  
**Kiiza Harriet**  
Ministry of Tourism, Wildlife and  
Antiquities

## Introduction

2

- Uganda is known as the pearl of Africa as our brand identity
- Globally, tourism continues to grow as a powerful global socio-economic Industry with the total international tourist arrivals reaching 1.4 billion and forex USD 1.451 trillion in 2018. Both the emerging and advanced economies have benefited from the rising tourism incomes although Africa has benefitted the least as it had only 67 million arrivals – translating into 5% of global tourist arrivals.

## Tourist Attractions and potential available

### Tourist Attractions and Potentials

Wildlife  
 Nature  
 Geography  
 Culture  
 Heritage  
 Good weather all year round  
 MICE  
 Business and investment  
 Hospitable people  
 Culinary art e.g Kampala food week, Rolex festival etc.

## Areas for development for tourism activities

- Source of the Nile
- Kagulu Hill
- Mt. Rwenzori
- Equator
- Bishop hannington site in Jinja
- Hot springs
- Handicraft And Souvenir Development
- Marine tourism
- Sports tourism, UTB has signed partnership with FUFA

5

- Golf tourism
- Fashion Tourism
- Filming tourism
- Night life in Kampala
- Kampala Sight seeing
- Faith based tourism
- Educational tourism
- Marine tourism

## Types of major tourist activities and their contributions to the sector

Major Tourist Activities	Contribution to the sector
Gorilla Trekking	
Chimpanzee Trekking	
Game drives	
Bird watching	
Sport fishing	
Mountain hiking	
White water rafting	

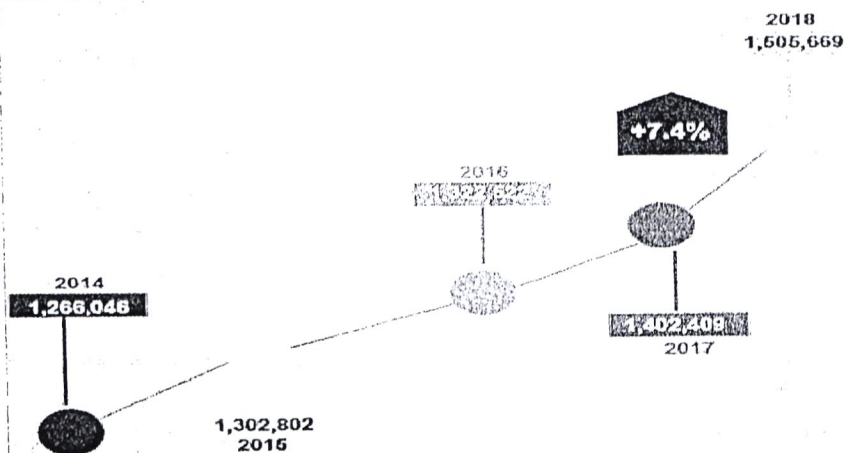
## Contribution of the Sector

7

- Uganda witnessed a 7.4% increase in international tourist arrivals in 2018, growing from 1,402,409 in 2017 to 1,506,669 in 2018. Direct revenue from international tourism rose to US\$1.6 billion in 2018, compared to US\$1.453 billion in 2017.
- Tourists from international air accounted for approximately 31% of the total international tourist arrivals to Uganda in 2018, growing by 10.2% compared to the previous year. Growth was recorded from Europe (+13.8%), the Americas (+9.2%), Asia (+10.2%) and the Middle East (+9.7%) in 2018.
- African land markets (regional and neighboring countries in Uganda are by road) make up 69% of Uganda's international arrivals, and grew by only 6.1% in 2018.
- Over the past 10 years, the tourist arrivals into Uganda have steadily increased from 850,000 arrivals in 2008 to over 1.505 million arrivals in 2018.

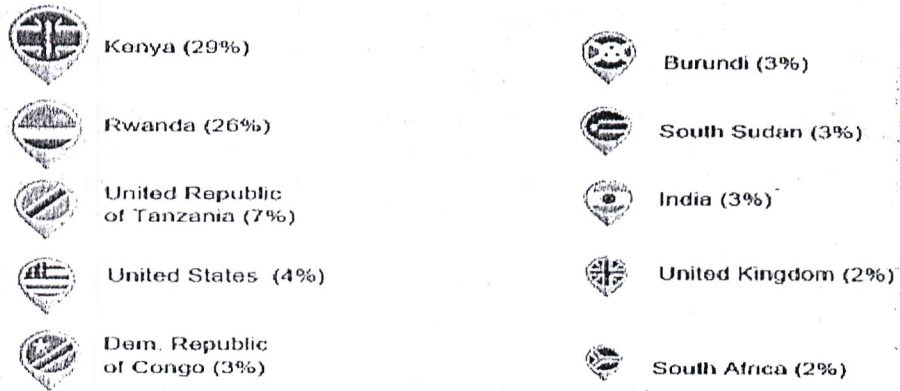
## Trend of Tourist Arrivals to Uganda

8



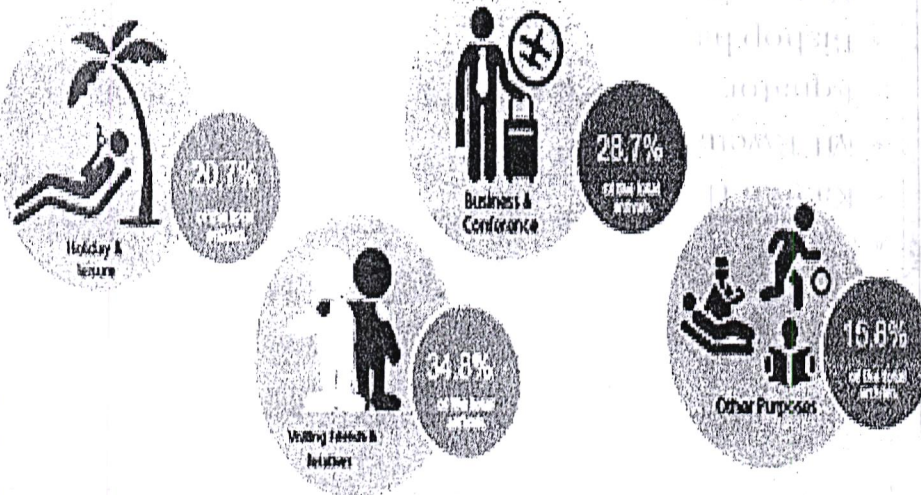
### Top ten Tourist Source Markets for Uganda in 2018 with % Market Share

9



### Tourist Arrivals by Purpose

10



## Tourism Earnings

11

- The earnings have been increasing steadily from USD 979 million in 2013 to USD 1.6 billion in 2018.
- In 2018, Tourism continued to be the leading foreign exchange earner to the Ugandan economy by generating USD 1.6 billion from the 1,505,669 visitors compared to USD 1.45 billion in 2017. This represented about 17.9% of the total foreign exchange earnings for 2017. The category of visitors with the highest expenditure is leisure visitors, who made up 20.1% of the total visitors.

## Contribution of Tourism to GDP and employment

12

- The total contribution of Tourism to GDP, including wider effects from investment, the supply chain and induced income impacts, was UGX 8,364.6 billion in 2018 (7.7% of GDP).
- Tourism generated 667,600 jobs in 2018 (6.7% of total employment) and this is forecast to grow to 971,900 in 2029. This includes employment by hotels, travel agents, airlines and other passenger transportation services (excluding commuter services). It also includes, for example, the activities of the restaurant and leisure industries directly supported by tourists.

## Summary of Economic Impacts

13

UGANDA 2018 KEY DATA

CONTRIBUTION OF TRAVEL &  
TOURISM TO GDP

**7.7%** OF TOTAL ECONOMY

Total T&T GDP = UGX8,364.6BN (USD2,228.6MM)

**+11.5%**

2018 Travel & Tourism GDP growth

CONTRIBUTION OF TRAVEL &  
TOURISM TO EMPLOYMENT

**667.6** JOBS (000's)

(6.7% of total employment)

**971.9** JOBS (000's)

Expected in 2029

## Strategies to develop the tourism sector

14

- Aggressive marketing of Uganda
- Diversifying tourism product range
- Improving tourism and hospitality skills along the tourism value chain
- Strengthening conservation of natural and cultural heritage
- Domestic tourism campaign e.g. Tulambule
- Six contracts in UK, USA, JAPAN, CHINA, UAE ETC. in different source markets
- Digital marketing should be taken to another level

## Challenges of facing the tourism sector

15

- Limited promotion of Uganda's attractions to conference participants during international conferences held in Uganda
- Negative image of Uganda in the international press
- Less than 1 million Ugandans visit tourism attractions
- Weak capacity in terms of instructional infrastructure, training manpower and the human capital of the trainers in the available tourism and hospitality training institutions
- Limited level of tourism skills throughout value chain - managerial, technical, and operational and in key supporting functions both in government and private sector.
- Limited investment in skills development of existing workforce by the private sector
- Lack of harmonization of tourism statistics from various sources
- Inadequate funding for the sector constrains sector growth

## Cont.Challenges

16

- Limited facilities (Class rooms, students' accommodation), tools and equipment especially at UWEC and the training institutions Managing wildlife in areas outside the protected areas ha (UWRTI and UHTTI). Thus is further worsened by inadequate staffing.
- Managing wildlife outside protected areas has remained a challenge with more cases of poaching. This has been worsened by population pressure and encroachments on both protected areas and wildlife environments. There is immense pressure for de-gazettement of conservation areas for human settlements in many parts of the country and this has undermined
- Human Wildlife conflict remained a challenge during the year as injuries of community members continued to be registered in different PAs.
- Insecurity arising from political instabilities in the neighboring DRC and Ebola outbreak which partly attributed to the reduction on visitor numbers in some national parks.
- Big issue with data collection

Big out cry by private sector on taxes

- Big investment costs
- High demand for gorilla permits hence need to diversify on the other tourism products to reduce on the demand for the gorillas.
- UTB has divided the country into 13 clusters to help develop unique products for the region and also enable get benefits down to the communities and also attract more investment in the regions.
- Big challenge on conservation of natural resources .i.e there is alot of deforestation, cutting down swamps, desilting water bodies etc.



## Tourism Sector In Tanzania

Presented by:  
Ministry of Natural Resources and Tourism

### Facts about Tanzania Tourism:

- Tanzania is the largest country in East Africa with an area of 947,303 km<sup>2</sup>.
- About 28% of its land is set aside as protected areas which include:-
  - 19 National Parks; 23 Game Reserves; 42 Game controlled Areas; 4 Ramsar sites; 2 Marine Parks; 1 Conservation Area (Including the crater and Olduvai Gorge); 33 wildlife management areas; 17 nature forest reserves and a number of historical and cultural sites;
  - More than 125 archaeological and historical sites, 1,440 km of coastline, the Spice Islands of Zanzibar, Africa's highest mountain, Mount Kilimanjaro and deep-sea resources.

### Cont...

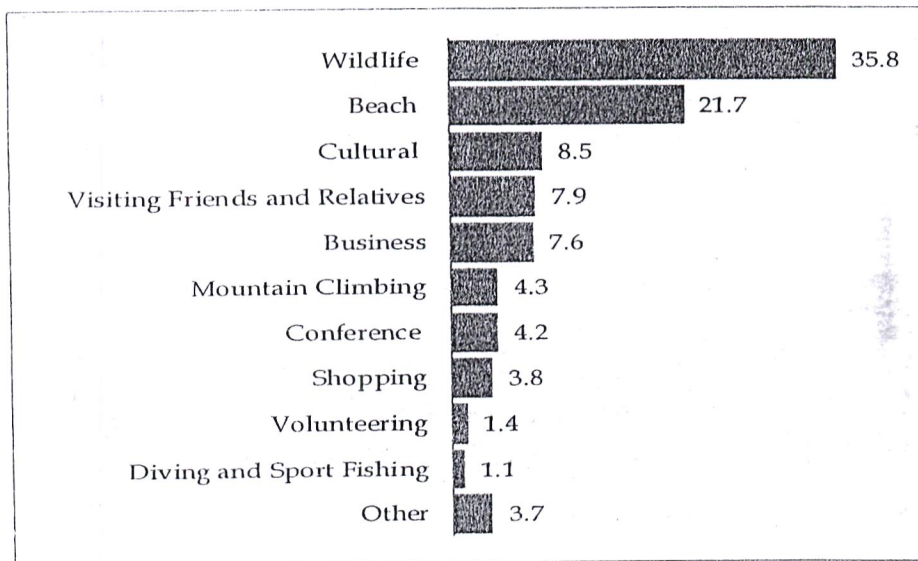
- The UNESCO inscribed seven areas as World Heritage Sites. Five of these – The Ngorongoro Conservation Area, Mount Kilimanjaro, Selous Game reserve, the Serengeti National Park, and the Zanzibar Stone Town - are household names;
- Two lesser-known sites on are (a) Kilwa Kisiwani, an offshore island south of Dar es Salaam - old Swahili city-state that flourished as a result of the medieval gold trade between Africa and Arabia and (b) the Konda Rock Art Site, inscribed as recently as 2006, consists of 150-plus painted rock of thousands of years.



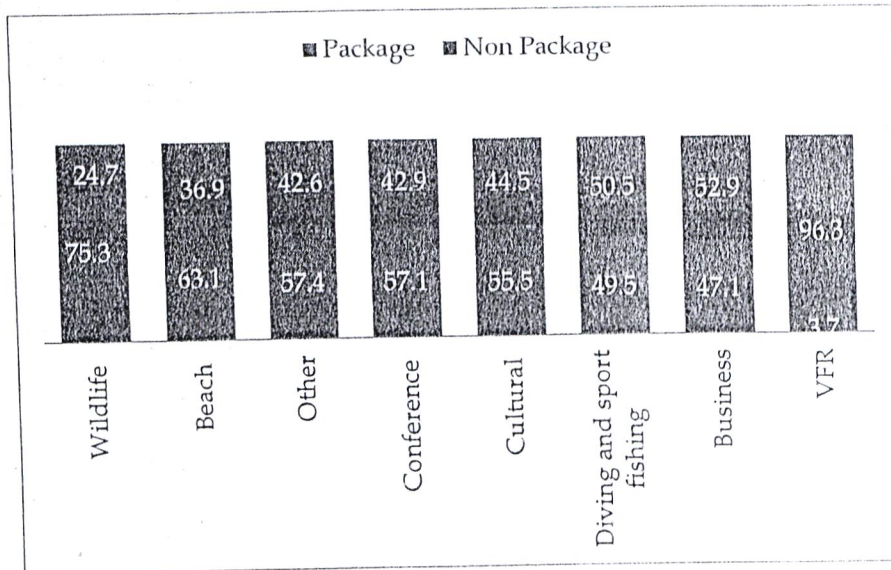
### Main tourism activities in Mainland Tanzania

- ❑ Wildlife is so far the dominant tourism product in Tanzania, with wildlife safaris in the northern circuit, and Zanzibar beaches dominating the tourism industry in the country;
- ❑ The International Visitor Exit Survey 2018, revealed that Wildlife based tourism is the most attractive activity for tourists accounting for one third of the total visitors;
- ❑ Other major tourism activities were beach, cultural, business, mountain climbing, shopping and conference (Chart 1).

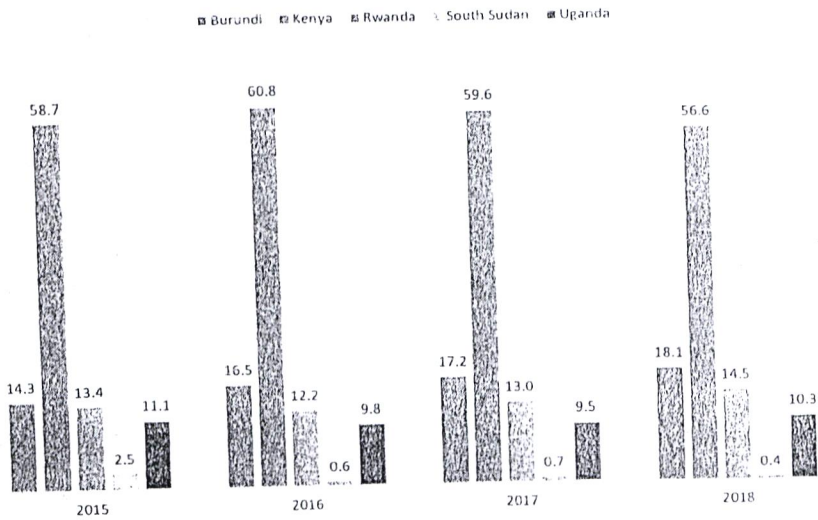
Chart 1: Main tourism activities in URT, 2018



**Chart 4: Main tourism activity by tour arrangement - 2018**

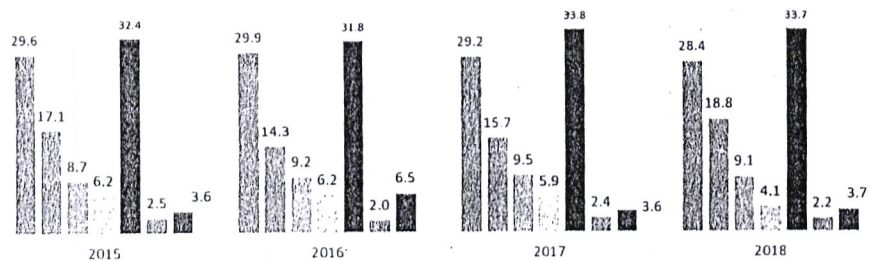


**Chart 5: Share of Visitor Arrivals in the EAC**



**Chart 6: Share of Visitor Arrivals in EAC and Rest of the World**

■ EAC ■ Africa ■ AMERICAS ■ EAST ASIA AND THE PACIFIC ■ EUROPE ■ MIDDLE EAST ■ SOUTH ASIA



**Table 2: International Visitor Arrivals in Tanzania, 2005 – 2018**

Year	Number of Visitor Arrivals	Annual Change (%)
2005	612,754	4.8
2006	644,124	5.12
2007	719,031	11.62
2008	770,376	7.14
2009	714,367	-7.27
2010	782,699	9.5
2011	867,994	10.89
2012	1,077,058	24
2013	1,095,884	1.7
2014	1,140,156	4
2015	1,137,182	-0.26
2016	1,284,279	12.1
2017	1,327,143	3.2
2018	1,505,702	13.5

### Contribution of Tourism Sector to the Economy

- In 2018, Tanzania received 1.5 million tourists and more than US\$ 2.4 billion, comprising more than 25% of the total exports, 60% of receipts from services and 9% of total investments (World Travel and Tourism Council, 2018).
- The sector currently supports over 467,000 direct jobs and 1,337,000 other jobs through direct and indirect linkages, which is equivalent to 12.2% of the nation's total employment.
- By 2028, direct jobs are expected to have risen to 795,000 (which will constitute 4.0% of total employment).
- The value of tourism investments reached USD 746.5 billion (8.7% of total investments) in 2017.

### Tanzania tourism in figures

Variable	2016	2017	2018
Total visitor arrivals (Thousand)	1,284	1,327	1,506
Receipts from inbound-tourism (US\$ Mill)	2,131.57	2,258.96	2,595.59
Average exp/person/day (US\$): <i>Package</i>	290	410	331
Average exp/person/day (US\$): <i>Non-Package</i>	131	139	135
Average length of stay (nights)	09	10	10

## Strategies to Develop Tourism Sector

- The development of tourism sector in Tanzania is guided by the National Tourism Policy. The first National Tourism Policy (NTP) was formulated in 1991 and was reviewed in 1999.
- The Tourism Master Plan was developed in 1996 and reviewed in 2002 to provide strategic roadmap for the tourism development. The Tourism Act (and its associated regulations) was formulated in 2008;
- To this end, Policy and related strategies played significant role in enhancing tourism development in the country. Among the strategies include the following:-
  - Strengthening Public – Private Dialogue - the Tourism Confederation of Tanzania (TCT) – Apex body representing the private business involved in travel and tourism industry in Tanzania was established;

## Cont...

- Strengthening Destination Marketing efforts - Joint (Public - Private sector) National Tourism Promotion and Marketing Strategies developed and jointly being implemented;
- Institutional and Legislative Framework for tourism sector is under regular review in line with the development of the tourism sector;
- Strengthening the National College of Tourism to address training needs of the industry;
- Diversification of Tourism Products Strategy- Geographical diversification - **Resilient Natural Resource Management for Tourism and Growth (REGROW)** Project: Southern Tanzania tourism infrastructure development

### Cont...

- Tourism Product Diversification - Tourism Diversification, Growth and Development Strategy with the view to developing other types of tourism products notably cruise ship tourism, Congress tourism and beach tourism has been developed. ***The strategy is to diversify away from safari and beach tourism and develop other types of tourism products notably congress and cruise ship tourism.***
- TTB is coordinating the development of joint EAC marketing strategy for the part of Tanzania.

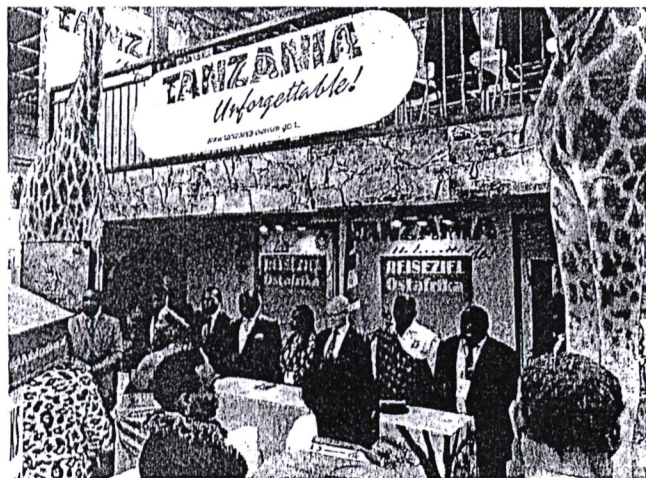
### Regional and International Cooperation in Tourism

- Tanzania recognizes the importance of bilateral and regional cooperation in the growth of tourism sector. It remains committed to supporting and abides with resolutions, treaties, agreements and cooperation at the bilateral, regional and international levels related to tourism sector.
  - Tanzania tour operators have established partnership with counterparts in the region and are cordially doing businesses;
  - TCT is a member of the East Africa Tourism Platform (EATP) - a private sector body for tourism in East Africa, working towards promoting the interest and participation of the private sector in the East African Community (EAC) integration process;

## Cont...

- Tanzania Tourist Board and other tourist boards in the region have cordial working relations in the marketing of destination East Africa. Each tourism marketing body participates in the tourism fairs organized by other member states – Magical Kenya - Kenya, Pearl of Africa Tourism Expo - Uganda and Swahili International Tourism Expo – Tanzania. The participation is based on barter arrangement.
- Grading and Classification of tourism facilities is being implemented based on EAC Criteria.
- Joint marketing in the major tourism fairs (ITB and WTM) – Partner states hold EAC Day, EAC ambassadors meeting, Use of EAC promotional materials.

## EAC day at ITB March, 2019



## Tanzania Day at ITB 2019

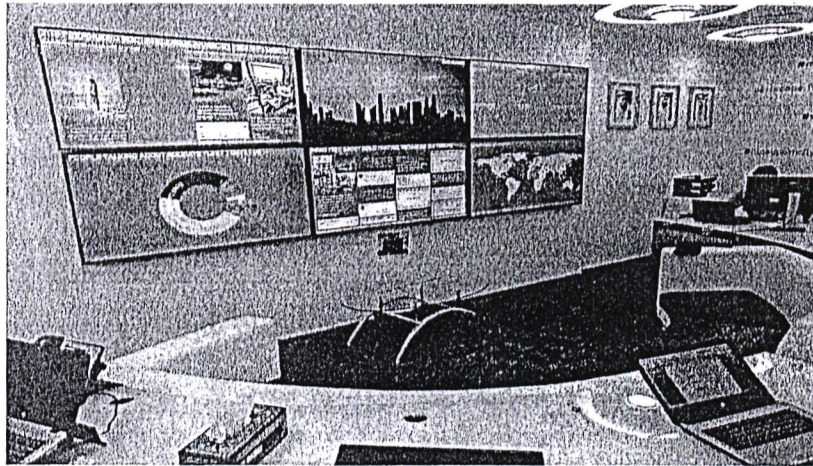


## EAC Ambassador's meeting ITB 5th March, 2019



# ACHIEVEMENTS IN THE DESTINATION

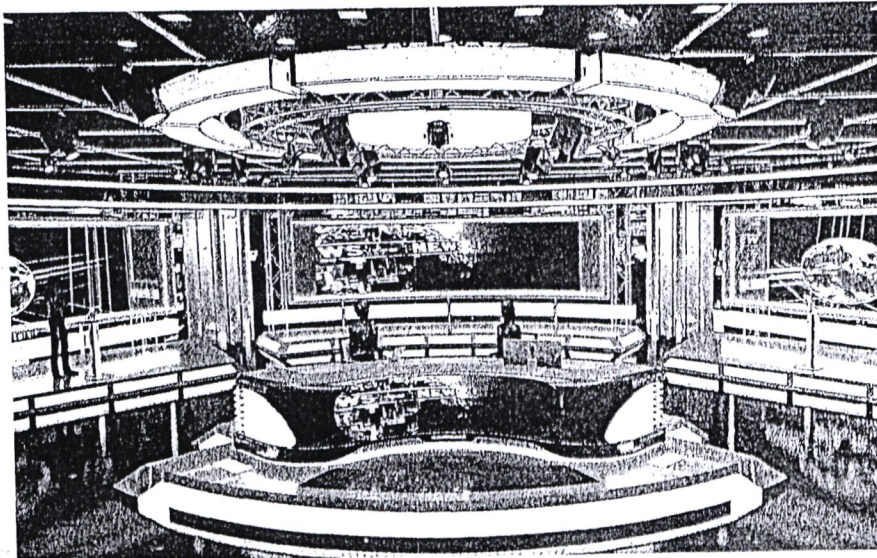
## *DESTINATION MARKETING* **Command centre – Studio**



*Destination brand*



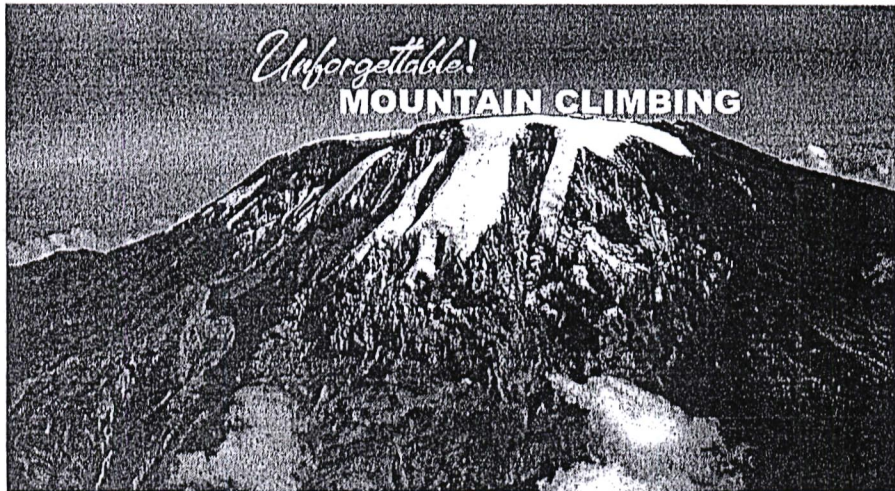
**Tanzania Safari Channel**



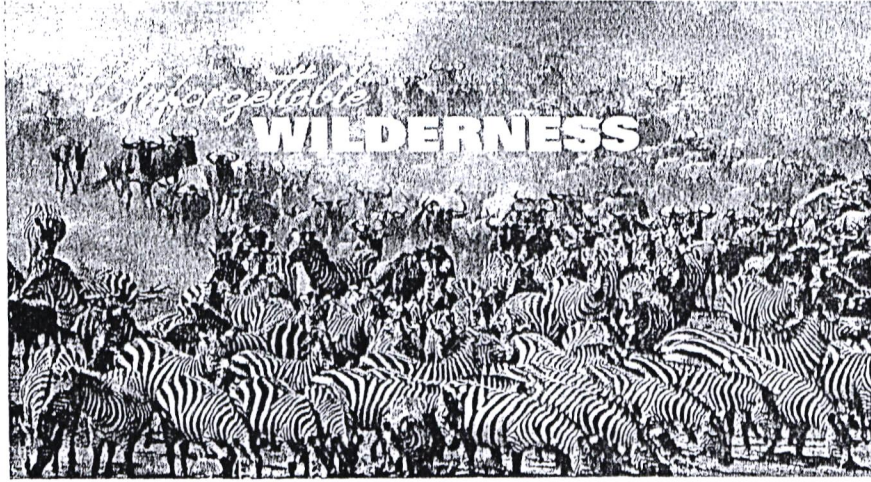
## National Carrier - ATCL



261 capacity



ΑΠΟΤΑΙ - 01

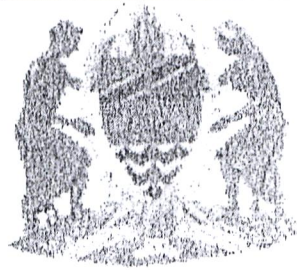


## **New Tourism Products**

- Geo park tourism;
- Eco – tourism;
- Festivals - Urithi;
- Meetings, Incentives, Conferences and Exhibitions (MICE);

## **Challenges Facing Tourism Sector**

- Overdependence on foreign markets – Mostly overseas Europe, North America;
- Inadequate funding in tourism related activities;
- Inadequate skilled manpower and expertise in tourism and hospitality;
- Inadequate tourism infrastructure and facilities as a result of inadequate investment in the sector;
- Overdependence on wildlife as tourism product- Lack of diversity in terms of tourist products and geographical coverage leading to slow growth of the tourism sector.



**END**

**Questions and Answers**