JUMUIYA YA AFRIKA MASHARIKI

EAST AFRICAN COMMUNITY

TOURISM MARKETING STRATEGY

2021-2025

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EAST AFRICAN COMMUNITY

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2021-2025

SUPPORTED BY:

United Nations
Economic Commission for Africa

"To be the leading sustainable regional tourism destination in Africa."

Preface.

The East African Community Tourism Marketing Strategy for the period 2021 -2025 outlines broad strategic objectives to be pursued as well as the priority actions to be undertaken during the period. This Strategy recognizes that tourism is a key socio-economic sector for all the EAC Partner States given that it contributes significantly to their Gross Domestic Product, foreign exchange earnings and employment. It also stimulates growth in other economic sectors due to its high multiplier effect. Cognizance is also taken of the fact that tourism is one of the economic sectors that have been devastatingly affected by the COVID-19 pandemic.

Owing to its importance, the Partner States have undertaken to develop a collective and coordinated approach to the promotion and marketing of quality tourism into and within the Community as stipulated in Article 115 of the EAC Treaty.

In particular, Partner States undertake to develop a regional strategy that reinforces the individual efforts of the Partner States. Having taken into account the aspirations of each Partner State as shared during the national stakeholder consultative fora, the Strategy aims at leveraging on the strengths and existing opportunities in each Partner State in order to fast-track the growth of the sector in the region.

Hon. (Dr.) Peter Mathuki
Secretary General
East African Community

The great potential for intra-regional tourism is seen as an opportunity which if exploited will create impetus for further growth for international tourism. Thus, the Strategy gives a major thrust to the intra-regional tourism. Also underpinning the Strategy is the need to develop multi-destinational tourism products that will enable tourists travel to more than one Partner State thus enjoying the diversity offered by the region.

We believe that effective implementation of the Strategy will not only lead to significant increase in tourist arrivals and earnings from the sector but will also contribute immensely to strengthening and deepening of integration in the region. In turn, this will enhance benefits to all the tourism stakeholders as well as to the citizens of the Community. We therefore call upon the Partner States and the private sector to play their roles with utmost commitment in implementation of the Strategy.

Foreword.

Ms. Vera Songwe
Executive Secretary
United Nations Economic Commission for Africa

The United Nations Economic Commission of Africa (ECA) takes cognizance of the fact that tourism is one of the key sectors identified by Governments and Regional Economic Communities in Africa including the East African Community (EAC) to drive economic development.

However, most of the prevailing African tourism models have not brought about significant socio-economic development particularly in terms of poverty alleviation and sustainability. It is also noted that the Eastern Africa Region does not rank favourably at the global level as a competitive destination as it should.

This is mainly due to lack of conducive policy and strategy frameworks, uncertainties in the business environment, inadequate collaboration among Partner States and inadequate branding of the destinations.

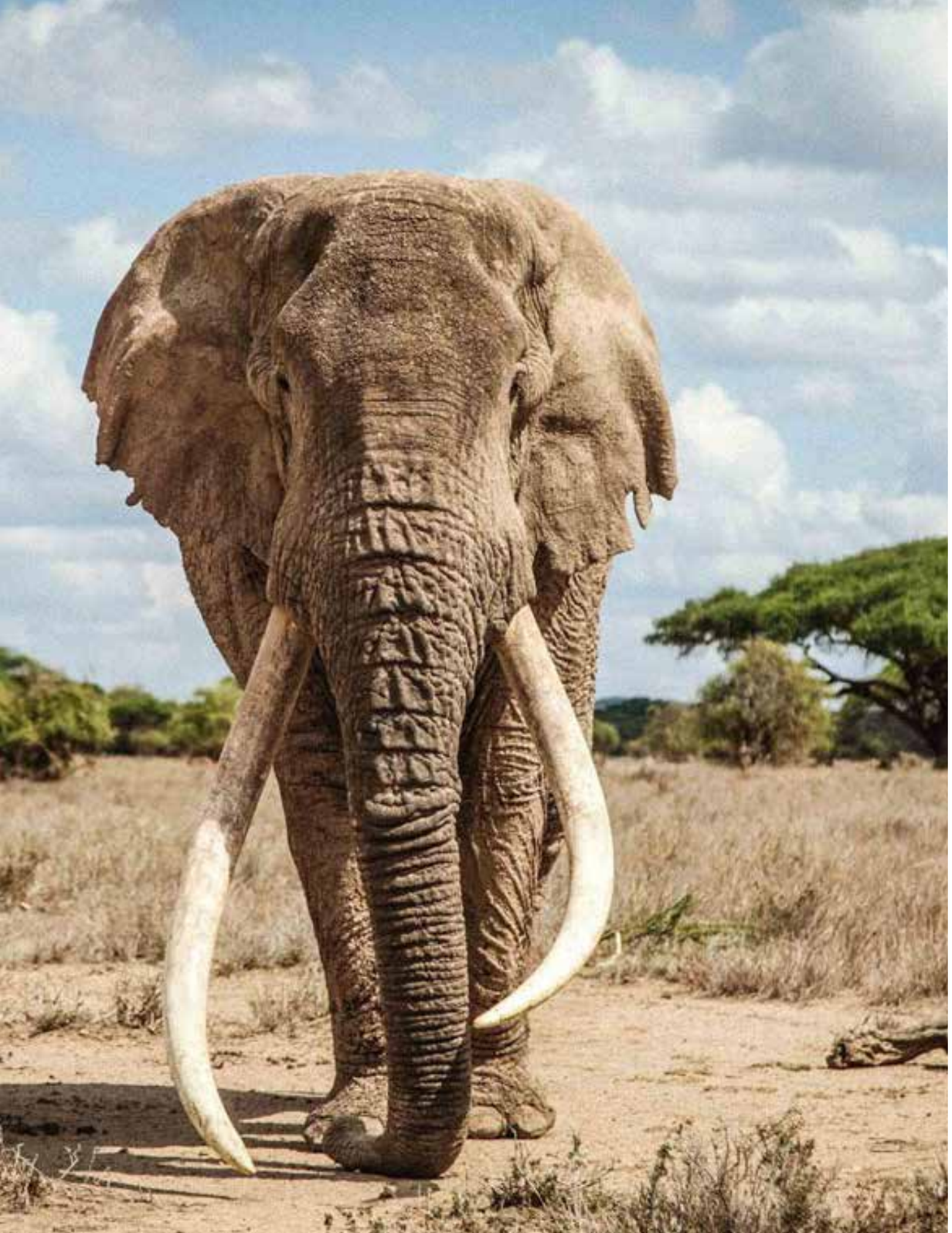
In addition, most countries in the region mainly depend on nature-based tourism whereas other opportunities such as cultural tourism, eco-tourism, sports tourism and business tourism remain largely unexploited.

In view of this, ECA partnered with the EAC to develop this five-year EAC Tourism Marketing Strategy aimed at transforming the sub-region into a leading sustainable tourism destination.

The Strategy is anchored on development and promotion of inclusive and sustainable intra-regional and international tourism.

The COVID-19 pandemic has more than any other previous crises revealed the need to promote intra-regional tourism alongside attracting the overseas markets. Given the rapidly growing middle class and burgeoning youth population in Africa, the potential for regional tourism cannot be gainsaid. ECA remains committed to working with EAC in actualizing the priority strategic actions proposed by this document.

It is our belief that EAC has unique tourism resources and attractions which if well packaged and effectively promoted will definitely put the region on the global map as a leading tourism destination.



Acknowledgement.

The immense contribution from stakeholders towards the development of the EAC Regional Tourism Marketing Strategy is highly appreciated.

The active participation of the representatives from private and public sectors as well as from the civil society during the national stakeholder consultation workshops conducted across all six EAC Partner States was commendable.

The information generated was very vital in informing and shaping this Strategy. While it may not be possible to list all of them, we are nonetheless greatly indebted to them.

Specific appreciation is extended to the Partner States that organised the national consultation workshops, Team of Experts drawn from all Partner States who provided the much-needed technical input and the EAC Secretariat Staff who tirelessly coordinated the entire Strategy formulation process.

We highly appreciate the technical and financial support given to us by the United Nations Economic Commission for Africa (ECA) Eastern Africa Sub-regional Office towards formulation of this Strategy.

Indeed, our partnership with ECA in the regional integration journey through tourism as well as other sectors is invaluable.

Hon. Christophe Bazivamo
Deputy Secretary General
(Productive and Social Sectors)
East African Community

" To develop and promote inclusive and sustainable intra-regional and international tourism across the EAC region."

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Abbreviations & Acronyms.

AfDB	African Development Bank
ASEAN	Association of Southeast Ocean Nations
AU	African Union
COMESA	Common Market for Eastern and Southern Africa
EABC	East Africa Business Council
EAC	East African Community
EAC-TMC	East African Community - Tourism Marketing Strategy
ECA	United Nations Economic Commission for Africa
EU	Europe Union
GDP	Gross Domestic Products
IDs	Identification Documents
IGAD	Intergovernmental Authority on Development
ITB	Internationale Tourismus-Börse
MICE	Meeting, Incentives, Conferences and Exhibitions
MSMEs	Macro, Small & Medium Enterprises
NGOs	Non-Government Organizations
NTOs	National Tourism Organizations
ONT	Office National de Tourism
OTA	Online Travel Agency
PPP	Public Private Partnership
RDB	Rwanda Development Board
RECs	Regional Economic Communities
SADC	Southern African Development Community
SDGs	Sustainable Development Goals
SGR	Standard Gauge Railway
TPD-WG	Tourism Product Development Working Group
TTC	Travel and Tourism Competitiveness
TSA	Tourism Satellite Account
UK	United Kingdom
UNCTAD	United Nations Conference on Trade and Development
UNESCO	United Nations Educational, Scientific and Culture Organization
UNWTO	World Tourism Organization
USD	United States Dollar
VFR	Visit Friends and Relatives
WEF	World Economic Forum
WTTC	World Travel Tourism Council

Executive Summary .

The tourism sector is increasingly playing a major role in the socioeconomic development of various Regional Economic Communities (RECs) across the world. The East African Community (EAC) recognizes the significance of the tourism sector which currently contributes an average of 9.5 % to GDP, 17.0 % to foreign exchange earnings and about 7.1% to employment. Under Article 115 of the EAC Treaty, the Partner States undertake to develop a collective and coordinated approach to the promotion and marketing of quality tourism into and within the Community. In particular, the Partner States undertake to develop a regional strategy for tourism promotion whereby individual efforts are reinforced by regional action.

In line with the Treaty, a draft regional marketing strategy was developed in 2003 with a focus on enhancing the competitiveness of the region based on its unique and vast natural resources, different, customs, beliefs, history and modern development. Given the changing tourism landscape, the Sectoral Council on Tourism and Wildlife Management in 2017, directed that a new Regional Tourism Marketing Strategy that addresses the emerging issues be developed. To this end, an EAC Tourism Marketing Strategy (2021 –2025) has been formulated with a vision to develop the EAC region to be the leading sustainable tourism destination in Africa. Emphasis has been placed on developing multi-destination regional tourism products that will be marketed to the intra-regional and international markets.

Tourism Performance in the Region

The tourism sector in the EAC region has been growing over the years although at varying rates in each of the Partner States. EAC tourist arrivals increased from 3.5 million in 2006 to 6.98 million in 2019. 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. In the same period, tourism receipts correspondingly increased from USD Billion 4.8 to USD Billion 6.1. However, this upward trajectory in tourism growth has been unexpectedly interrupted by the unparalleled travel restrictions such as cancellation of international flights, closure of borders and lockdowns that have been imposed by Governments towards containment of COVID-19 pandemic.

Tourism contributed to the GDP of EAC Partner states an average of 9.5% in 2019 although the percentage contribution was higher than the average in Tanzania (17.2%), Kenya (9.7%) and Rwanda (9.0). Furthermore, the sector contributed an average of 17.0% to EAC total exports with 25% in Tanzania. In terms of employment, tourism contributes an average of 7.1% to total employment in the EAC translating to 4.06 million jobs.

Despite the 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 a number of challenges which include: limited product diversification; a weak regional policy and institutional framework; unfavourable business environment; inadequacies in the marketing and promotion programmes at national level; and limited coordination of Partner States marketing efforts at the EAC regional level. All these have negatively impacted on the region's travel and tourism competitiveness. Therefore, the region and Partner States have to implement key strategic actions in order to enhance their competitiveness, position the EAC region as the leading sustainable tourism destination in Africa and realize the full potential of the sector in the region.

EAC tourist arrivals increased from 3.5 million in 2006 to 6.98 million in 2019.

Vision, Mission and Guiding Principles of the Marketing Strategy

The Strategy sets the vision of the ***'EAC becoming the leading sustainable regional tourism destination in Africa'*** and the mission is to ***'develop and promote inclusive and sustainable intra-regional and international tourism across the EAC region'***.

In line with this vision, the Strategy is guided by the fundamental principles that regional tourism should be based on:

i. Development of intra-regional tourism products involving more than one Partner State;

ii. Enhance spreading of tourism benefits by involving SMEs, communities and marginalised groups; Building institutional capacity of Partner State to develop and market regional tourism products;

iii. Building institutional capacity of Partner States to develop and market regional tourism products;

iv. Strengthening private sector capacity to develop regional products and undertake joint marketing;

v. Building a strong EAC tourism destination brand that takes into account Partner States unique identity and distinctiveness; and

vi. Development of EAC as a competitive and sustainable regional tourism destination.

Strategic Objectives, Directions and Priority Actions

The Strategy has set five key strategic objectives that will enhance regional competitiveness. These are:

i. Develop regionally and internationally competitive multi-destination tourism products offering high experiential travel;

ii. Position and market EAC as a leading regional tourism destination in Africa;

iii. Branding East Africa as a leading tourism destination;

iv. Build institutional capacity of EAC secretariat and Partner States to effectively develop and market the region as a tourism destination of choice: and

v. Enhance financing for tourism marketing and promotion

In line with the objectives, the Strategy identifies five key strategic directions and proposes a number of priority actions to be implemented within the period July 2020 to June 2025. The strategic directions and the corresponding strategic actions are:

a. Develop regionally and internationally competitive multi-destination tourism products

The existing multi-destination tourism products shall be improved in terms of their quality in a bid to enhance their competitiveness. In addition, the range of the multi-destination product offerings shall be increased in order to encourage more tourists to undertake visits that cover two or more countries within a single trip.

b. Position and Market EAC as a Preferred Tourism Destination

This will entail strengthening existing tourism marketing strategies; identifying key source markets for multi-destination products; joint packaging, promotion and marketing of tourism products in the region; enhancing digital marketing and e-platforms; and designing Intra EAC tourism marketing and promotion campaign.

c. East Africa Branding to become a preferred tourism destination

There is need to undertake comprehensive branding that communicates the diversity of the products and experiences in the region. The priority actions in this regard include engaging a branding agency, undertaking a brand audit, defining EAC brand attributes and developing a brand promotion and communication strategy.

d. Marketing and Institutional Framework

In order to build a strong marketing and institutional framework, institutional capacity at Partner States level shall be enhanced. Capacity building shall also be undertaken within the Department of Tourism and Wildlife Management at the Secretariat as well as for tourism marketing focal points at Partner States level. Dedicated tourism working groups shall be created under the existing sectoral committee on tourism to focus on different critical areas including tourism product development; tourism marketing promotion and communication; standards and quality assurance; and Statistics, Research and Development. Further, the private sector shall be adequately involved through an umbrella regional tourism association.

e. EAC Tourism Marketing and Promotion Financing

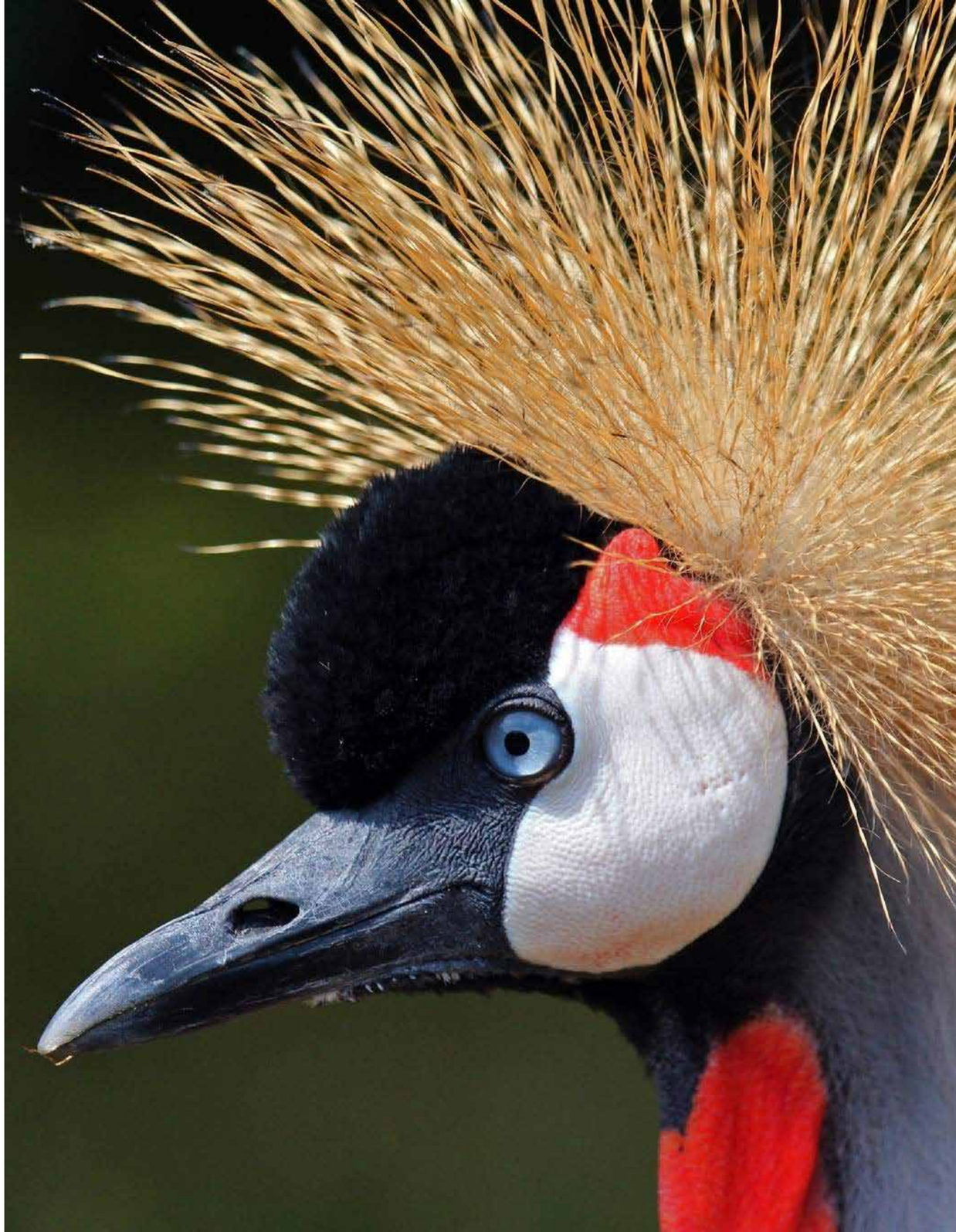
To address the challenge of limited financing affecting tourism marketing and promotion, efforts shall be made to prioritize tourism in budgetary allocations in order to finance implementation of the key activities proposed in this Strategy. Resource mobilization efforts targeting relevant Development Partners to support different aspects of the Strategy shall be strengthened. In addition, innovative financial mechanisms such as private sector support shall be explored.

Implementation Framework and Tourism Projections

To achieve the Strategy objectives and ensure the implementation of the priority actions, an implementation monitoring and evaluation framework shall be developed to help tracking the performance of the Strategy. Various stakeholders have been identified to play specific roles in the implementation of the Strategy. They include: the National Tourism Organisations (NTOs) to coordinate and align national efforts with regional marketing initiatives; the EAC secretariat to coordinate Partner States efforts and regional marketing initiatives; the private sector to support product development and marketing initiatives; technical working groups to provide professional advice and technical support to the tourism and wildlife sectoral committees; development partners and other EAC bodies to provide policy advise, technical and financial support.

Monitoring and reporting functions shall be conducted by the EAC Secretariat. This shall entail tracking the performance of the individual Partner States in line with the agreed procedure and set targets. The Secretariat shall also coordinate the functioning of working groups based on their specific terms of reference. In addition, the Secretariat shall compile quarterly or bi-annual reports that shall be reviewed by the Sub-sectoral Committees and considered by the Sectoral Council on Tourism and Wildlife Management. Given that the Strategy is a living document, monitoring will help identify areas that require adjustments during the implementation process.

The marketing strategy makes tourist arrivals and receipts projections based on three scenarios of success in implementation of the Strategy. With regards to total international tourism, under the 'Business-As-Usual' scenario, the Strategy estimates a drop of 67.7% in total arrivals in 2020 due to the impact of COVID-19 followed by a recovery period with arrivals reaching 7.29 million in 2025 with estimated receipts increasing from USD 6.1 billion in 2019 to USD 8.6 billion in 2025. Under the 'Average Implementation' scenario, total arrivals are projected to reach 8.6 million in 2025 and receipts increase to USD 9.2 billion in 2025. Under the 'Full Implementation' Scenario, total arrivals are projected to steadily rise to 11 million and receipts to USD 10.4 billion in 2025.



1.0 Introduction.

1.1 Background

Tourism is increasingly playing a significant role in the socio-economic development of various Regional Economic Communities (RECs) especially in the developing countries including the East African Community (EAC). Partner States in EAC (Burundi, Kenya, Rwanda, South Sudan, Uganda and United Republic of Tanzania) are endowed with myriad tourism attractions ranging from abundant and diverse species of wildlife, unparalleled natural wonders characterized by trans-boundary ecosystems, profound water bodies, scenic landscapes, pristine beaches and rich cultural heritage among others.

In EAC, tourism is emerging as one of the most significant economic sectors in the Partner States. The sector has important backward linkages to the local economy and contributes to growth and employment in other sectors. It also provides linkages with other sectors like agriculture, banking, manufacturing, transport and insurance. Tourism total contribution to GDP in EAC Partner States is quite significant ranging from 5.1% in Burundi to 17.2% in Tanzania. The sector contributed an average of 17.0% to export earnings and 7.1% to employment among the EAC Partner States in 2019.

Owing to its socio-economic significance in EAC, tourism is one of the productive sectors that are identified to enhance cooperation among the Partner States. As stipulated under Article 115 of the EAC Treaty, the Partner States undertake to develop a collective and coordinated approach to the promotion and marketing of quality tourism into and within the Community. In particular, the Partner States undertake to develop a regional strategy for tourism promotion whereby individual efforts are reinforced by regional action.

Tourism performance in the region varies across the Partner States with total international arrivals of about 6.98 million in 2019. Tourist arrivals in Burundi and South Sudan have remained low

The tourism sector contributed an average of 17.0% to export earnings and 7.1% to employment among the EAC Partner States in 2019.

while in Kenya the arrivals are increasing after a decline experienced in 2015. Rwanda, Uganda and United Republic of Tanzania on the other hand have been experiencing a steady growth in terms of tourist arrivals. However, this upward trajectory in tourism growth has been unexpectedly interrupted by the unparalleled travel restrictions such as cancellation of international flights, closure of borders and lockdowns that have been imposed by Governments towards containment of COVID-19 pandemic. Cognizance is taken of the fact that the full potential of the sector is yet to be realized, a situation which is mainly attributed to a number of challenges faced by the sector. Among the main challenges facing the sector are ineffective tourism marketing and promotion programmes at the national level and limited marketing coordination at the regional level.

In order to overcome the marketing and promotion challenges and improve the competitiveness of the region, the Sectoral Council on Tourism and Wildlife Management called for the development of a EAC Tourism Marketing Strategy. Through review of the Draft EAC Tourism Marketing strategy and plan done in 2003, other relevant literature and comprehensive stakeholder consultation process in all the Partner States, an EAC Tourism Marketing Strategy for the period 2021 – 2025 has been developed.

The Strategy identifies the key regional marketing issues including product development, marketing, branding as well as policy and institutional framework and stipulates priority actions that will enable the EAC region become a competitive tourism destination and ensure that the sector contributes more significantly to the overall socioeconomic development of the region. This reinforces the aspirations of African Union's Agenda 2063 to positively transform the continent.

1.2 Approach of the Marketing Strategy

The Strategy is grounded on the incremental and integrated planning approach. In order to build a robust and resilient tourism sector, the Strategy puts emphasis on developing intra-regional tourism products and activities and promoting travel within the EAC region. The Strategy is cognizant of the fact that intra-regional tourism highly depends on the efforts of Partner States in promoting domestic tourism. Given that the tourism industry in EAC has over the years mainly depended on international source markets from outside the EAC region, mainly Europe and the Americas, the Strategy adopts an integrated approach which involves employing strategies that target the various source markets. As much as the main thrust of the Strategy will be on intraregional market segment, strategies are also embedded into the Strategy to grow the other market segments. The focus in the intra-regional tourism is premised on the rapidly growing middle class in the African Region. According to the African Development Bank, about 20% of the population in the Africa fall within the middle class[2] . Deriving from this, about 38 million people in the EAC region are within the middle class and have a relatively high propensity to travel for tourism purposes within the region.

2 *African Development Bank (AfDB) 2011, The Middle of the Pyramid: Dynamics of the Middle Class in Africa AfDB Abidjan.*

2.0 Situation Analysis.

2.1 Global and Africa Tourism Trends

2.1.1 Global Tourism

Globally, tourism and travel is the largest service industry with international arrivals having reached 1.5 billion in 2019 compared to 25 million on the 1950's[2] . Various countries in the world have identified tourism as one of the sectors that can greatly contribute to inclusive growth and sustainable development. The sector accounts for more than 10% of global GDP and represents 7% of all international trade and 30% of the world's export in services[3] [4]. The tourism sector has also led to increased employment opportunities (especially for the women and youth), boosted direct foreign investment, stimulated the construction of infrastructure utilized by tourists and the host communities (such as roads, airports, water supply, medical services, telecommunication networks) and in general fosters inclusive growth that supports development at local, national and regional levels.

The unprecedented societal changes brought on by the COVID-19 pandemic that started in Wuhan City in China in December 2019 have dramatically affected tourism. According to the data reported to UNWTO by destinations around the world at the close of the year, the COVID-19 pandemic caused a 73% fall in international tourist arrivals in 2020 confirming the worst-case scenarios envisaged by most of the international agencies[5]. This however varied across the different regions of the world with Asia and Pacific being most affected at -84% followed by Middle East at -75%, Europe at 70%. The drop in Africa and the Americas was 69% and 68% respectively. When Africa is disaggregated, North Africa was more affected at -78% than Sub-Saharan Africa at -63%. The drop in international arrivals globally in 2020, translated into a loss of 1 billion international arrivals and about USD 1.3 trillion in receipts (exports from tourism).

2 *UNWTO Tourism Barometer 2020*

3 *World Travel and Tourism Council WTTC (2019) Travel and Tourism Economic Impact 2019, WTTC,*

4 *World Bank (2017) Tourism for Development: 20 Reasons Sustainable Tourism Counts for Development*

5 *https://www.unwto.org/unwto-tourism-dashboard*

2.1.2 Africa Tourism Trends

As Africa strives to pursue building productive capacities and enhance economic diversification, tourism has been identified as one of the sectors with a high potential to contribute to inclusive growth, structural transformation and achievement of the Sustainable Development Goals (SDGs). However, in order for this to be achieved, Africa needs to adopt policies that strengthen inter-sectoral linkages, boost intra-regional tourism and promote peace[6].

Policy makers at continental and Regional Economic Communities (RECs) levels are increasingly realising the importance of tourism and are putting in place supportive policy frameworks. The continental frameworks include the African Union's Agenda 2063 and Tourism Action Plan, while at the sub-regional levels they include the 2012 Protocol on Tourism of the Southern African Development Community (SADC), the Sustainable Tourism Development Strategy of the Common Market for Eastern and Southern Africa (COMESA) and the Sustainable Tourism Master Plan 2013–2023 of the Intergovernmental Authority on Development (IGAD).

Over the years, there has been increasing outbound travel from developing regions including Africa. World Economic Forum notes that developing and emerging markets are not only becoming larger source markets but they are also improving their travel and tourism competitiveness in order to position themselves as more attractive destinations[7]. The international tourist arrivals in Africa increased from 26.2 million in 2002 to 73 million in 2019. Before the onset of the COVID-19 pandemic, UNWTO had projected international tourist arrivals to Africa to reach 134 million arrivals by 2030. Figure 2.1 below shows the growth of international tourist arrivals to Africa between 2002 and 2019.

Africa's international tourism receipts have also been increasing and by 2018 they were at US $ 38.4 billion compared to USD 30.4 billion in 2010. Employment in the tourism sector has posted positive outcomes with direct employment increasing from 9 million jobs in 2016 to 9.3 million in 2018 and a total 21.9 million direct, indirect and induced employment in 2016 that increased to 22.8 million in 2018[8].

Increasingly, attention in Africa is now drawn to enhancing intra-regional tourism performance and development. United Nations Conference on Trade and Development (UNCTAD) highlights the urgent need to tap into the opportunities of intraregional tourism which include regional integration deepening, economic and export diversification. Increased intra-regional travel facilitates greater access to tourism destinations, increases the sectors multiplier effect, reduces leakages from the sector, helps reduce seasonality and boosts the competitiveness of destinations[9].

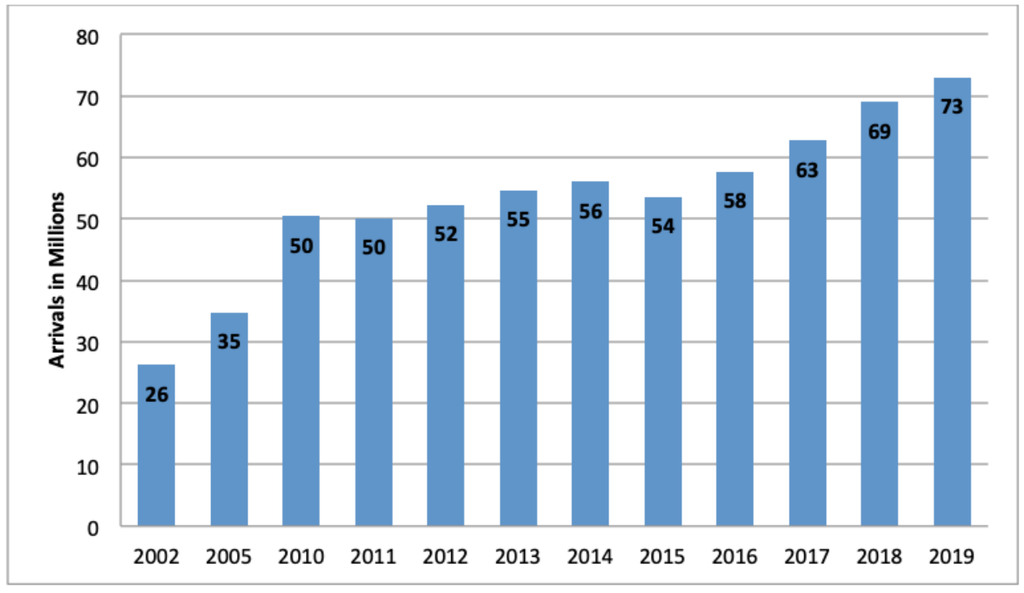
6 *United Nations Conference on Trade and Development (UNCTAD) 2017, Economic Development in Africa Report 2017 – Tourism for Transformative and Inclusive growth, UNCTAD, New York.*

7 *World Economic Forum (WEF) 2017, Travel and Competitiveness Report 2017, WEF, Geneva*

8 *World Travel Tourism Council (WTTC). Travel and Tourism Economic Impact 2018 Report for Africa, WTTC and UNWTO International Tourism Highlights 2019*

9 *United Nations Conference on Trade and Development (UNCTAD) 2017, Economic Development in Africa Report 2017 – Tourism for Transformative and Inclusive growth, UNCTAD, New York.*

UNCTAD data for 2010 – 2013 reveals that intra Africa travel recorded a share increase from 34.4% of the total arrivals in 2010 to 40.3% in 2013. This implies that approximately 4 out of every 10 international tourists to Africa originated from within the continent. Sub-Saharan African has a higher share of arrivals - approximately 64% - implying that approximately out of every three tourists to sub-Saharan Africa, two of them originate from the African continent. However, levels of intra-regional tourism across Africa are still comparatively low compared to UNWTO global estimates of 80% arrivals originating from the same region[10].



Source: UNWTO Barometer (2020)

Figure 2.1: International tourists Arrivals in Africa – 2002 - 2019

10 *UNWTO (2016) UNWTO Tourism 2017 Highlights, UNWTO Madrid*

2.2 East Africa Tourism Policy and Institutional Arrangement

Review of the Partner States policy and development frameworks reveals that tourism is recognized as a key driver for future growth with a high potential to transform their economies. In particular, tourism development has been prioritized in the Burundi Vision 2025, Kenya Vision 2030, Rwanda Vision 2050, Tanzania Vision 2025 and Uganda Vision 2040. In most of the Partner States' national development plans, tourism has also been given priority and the tourism policies and plans have been developed and they propose strategies for promoting regional tourism within the EAC region in addition to the overseas markets.

Table 2.1 below provides a summary of institutional, planning and policy frameworks of the Partner States and their focus on regional tourism.

Table 2.1: EAC Partner States tourism policy, planning and institutional framework and regional tourism focus.

Country	Institutional, Policy and Planning framework	Focus on Regional Tourism
BURUNDI	Tourism Sector is managed by National Tourism Office (ONT) under The Ministry of Trade, Industry, and Tourism **Sector policies and regulation in place:-** • Burundi National Strategic plan for Sustainable Development of Tourism • Burundi Vision 2025 • National Development Plan 2018-2027 Strategic Framework of Growth and Fighting Poverty I & II	• Promotion of Burundi tourism to neighbouring countries • Adopting a regional approach for participation in regional and international treaties/ agreements on wildlife conservation and management • Promotion of domestic tourism with niche products • Improvement of tourism infrastructure in tourism destination areas • Implementation of EAC Hotels and Restaurants classification system • Development of infrastructure to enhance MICE • Enhanced mobility of persons in EAC • Encouraging human resource capacity building
KENYA	Tourism Sector is under Ministry of Tourism and Wildlife **Sector policies and regulation in place:-** • Sessional Paper No.10 on Development of Sustainable Tourism • Tourism Act 2011 • National Tourism Blueprint 2030 • Tourism Marketing Strategic Plan 2013-2018 • Kenya Vision 2030 • National Wildlife Strategy 2030 • Wildlife Amendment Act 2013 • National Museums and Heritage Act 2019	• Identification of domestic and EAC as top core markets • Development of unique and differentiated products targeting the domestic and regional tourists. • Targeting regional tourism market by running regional awareness campaigns • Emphasis on standardisation of quality services • Public Private Partnerships in improving Tourism sector infrastructure-roads, railway • Market segmentation and PR firm engagement. • Strengthening Hotel and Tourism Training Institutes for better human resource within EAC Partner States • Regional initiatives in protection of Wildlife • Adopting a regional approach for participation in regional and international treaties/agreements on wildlife conservation and management

Country	Institutional, Policy and Planning framework	Focus on Regional Tourism
RWANDA	Tourism managed by Rwanda Development Board (RDB) under Department of Tourism and Conservation **Sector policies and regulation in place:-** • -Rwanda Tourism Policy 2009 • -Sustainable Tourism Development Master • Plan for Rwanda 2009 • - Tourism Vision 2024 • - Rwanda Tourism Law 2014	• MICE – Development of a Rwanda Convention Bureau • Participation in international trade fairs • Capacity building and developing human resources - skills training with regional educational establishments • Enhanced access to Rwanda as a destination through visa facilitation • Implementation of EAC Hotels and Restaurants classification system • Public Private Partnerships in improving Tourism sector infrastructure-Roads and Hotel facilities. • Market segmentation and PR firm engagement. • Adopting a regional approach for participation in regional and international treaties/agreements on wildlife conservation and management.

Country	Institutional, Policy and Planning framework	Focus on Regional Tourism
SOUTH SUDAN	Tourism Sector is under the Ministry of Wildlife Conservation and Tourism **Sector policies and regulation in place:-** • Tourism Policy (2012) • National Tourism Strategy (2015) • Tourism Act (2013) under review	• Emphasis on marketing South Sudan regionally as new destination • Ensuring the country's foreign missions assist in marketing and promoting touris • Closely work with EAC to market regional circuits and interconnected regional tourism product • Regional cooperation in tourism related information and research findings • Harmonizing national hotel classification exercise with that of EAC

Country	Institutional, Policy and Planning framework	Focus on Regional Tourism
UNITED REPUBLIC OF TANZANIA	Tourism is managed under Ministry of Natural Resources and Tourism and the Ministry of Information, Tourism and Heritage (Zanzibar) **Sector policies and regulation in place:-** **Mainland** • National Tourism Policy 1999 (under review) • Tourism Master Plan 2002 • National Tourism Strategy (under formulation) • International Marketing Strategy 2012 • Vision 2025 • Domestic Tourism Marketing Strategy 2018 – 2023 • Cultural Heritage Policy 2008 • Tourism Act 2008 • Tanzania National Wildlife Policy 2007 • Wildlife Conservation Act 2005 • National Beekeeping Policy 2014 • Antiquities Act 1979 • National Forest Policy 2010 • Forest Act 2002 **Zanzibar** • Zanzibar Tourism Policy (2017) • Zanzibar Tourism Master Plan (2003) • Zanzibar Tourism Marketing Strategy and Strategic Plan 2015-2020.	• Focus on regional markets (target more on Southern Africa) • Improving the quality of service. • Increasing international publications on tourism in Tanzania • Public Private Partnerships in improving Tourism sector infrastructure-roads, railway • Market segmentation and PR firm engagement. • Strengthening Hotel and Tourism Training Institutes for better human resources • Regional initiatives in protection of Wildlife • Adopting a regional approach for participation in regional and international treaties/agreements on wildlife conservation and management. • MICE- promotion of events and festivals of a regional nature.

Country	Institutional, Policy and Planning framework	Focus on Regional Tourism
UGANDA	Tourism managed by Ministry of Tourism, Wildlife and Antiquities **Sector policies and regulation in place:-** • Uganda Tourism Policy (2015), • Uganda Tourism Development Master Plan 2014-2024 • National Tourism Marketing Strategy (under Review) • Tourism Sector Development Plan 2015 /2016 -2019/2020 • Tourism Act (2008) – under Review • Vision 2040 • Uganda National Development Plan II • Uganda Wildlife Act 2019 • Uganda Wildlife Policy 2014 • Museums and Monuments Policy 2015 • Uganda Hotel and Tourism Training Act 2015 • Uganda Wildlife Research and Training Institute Act 2015	• MICE - promotion of events and festivals of a regional nature • Participation in regional tourism trade fairs • Familiarization tours for regional media houses and major tourism operators • Classification, certification and licensing of tourism facilities and operators • Regional initiatives on trans-boundary wildlife protection and support to regional and international treaties/agreements • Public Private Partnerships in improving Tourism sector infrastructure-Roads • Development of new products and diversification

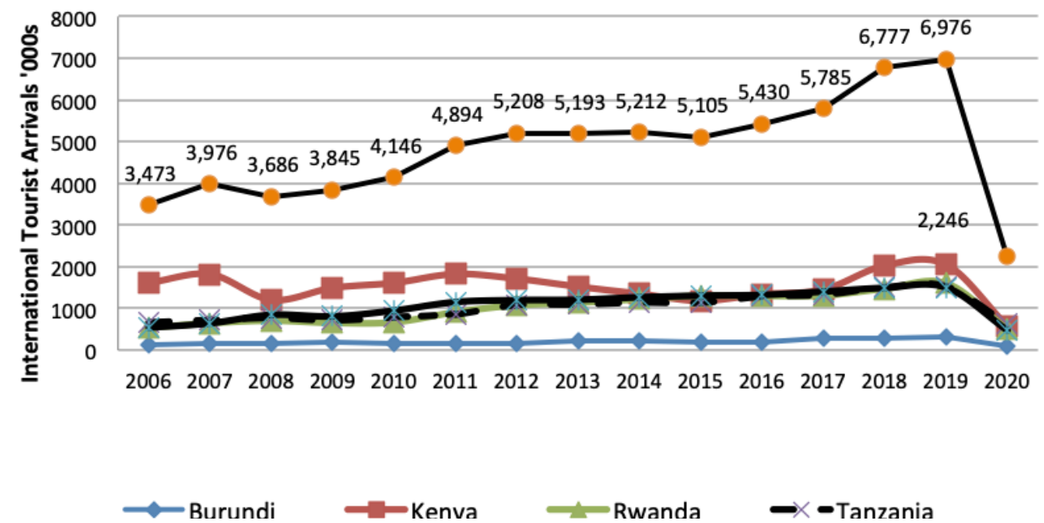
At the EAC regional level, tourism and wildlife management are priority areas. In the EAC Vision 2050, tourism is identified as one of the pillars that require keen interventions to foster economic development. Moreover, the 5th East African Community Development Strategy (2017 - 2022) also identifies tourism and wildlife management as a priority sector.

Currently, tourism development and marketing activities at the EAC Secretariat are coordinated by the Department of Tourism and Wildlife Management which falls under the Directorate of Productive Sectors. The Department works closely with the Sub-sectoral Committees on Tourism and Wildlife Management which report to Sectoral Council for Tourism and Wildlife Management. Under this arrangement, there is no institutionalized framework through which the tourism private sector directly engages with EAC to enhance tourism marketing and development.

2.3 East Africa Tourism Performance

2.3.1 Arrivals and Receipts

The international tourist arrivals to the EAC had been steadily increasing up to 2019, although at varying rates in each Partner State with total annual arrivals of about 6.98 million realized in 2019. This steady growth was however abruptly interrupted by the COVID-19 Pandemic in 2020.



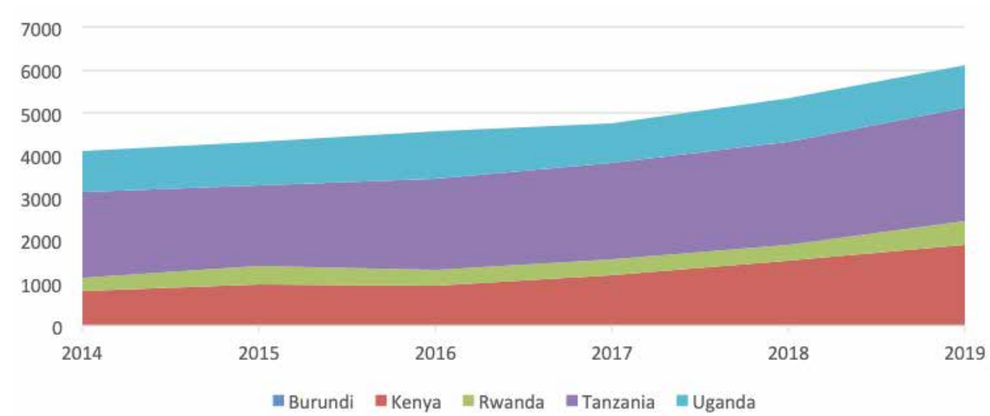
Source: East Africa Facts and Figures Report 2016, Partner States Statistical abstracts. South Sudan data not available

Figure 2.3: Trend of international tourist arrivals in East Africa Community

Considering the rich and diverse natural and cultural resources, the highest number of international arrivals recorded in the EAC, that is, 6.98 million 2019 is still relatively low. This represents only 8.6% of the Africa Market share and 0.3 % of the global market share. This implies that if the tourism potential in the region is to be harnessed, the EAC has to undertake strategic actions that will enable her increase tourist arrivals and benefits from the resultant socioeconomic impacts.

Tourism receipts for EAC Partner States indicate that the sector is increasingly generating more revenue for the region. Tourism receipts in Burundi have remained low, while the highest receipts have consistently been registered in United Republic of Tanzania and Kenya. Uganda and Rwanda have also consistently registered increase in tourism receipts.

Figure 2.4 shows the trend in tourist receipts in the EAC Partner States between 2006 and 2019.



Source: WTTC, 2020[11]. South Sudan data not available

Figure 2.4: Tourist Receipts of EAC Partner States 2006-2019 (in Billion US dollars)

2.3.2 Tourism Contribution to GDP, Export Earnings and Employment of EAC Partner Sates

The tourism sector is making substantial contribution to the Gross Domestic Product, export earnings and employment in individual Partner States. Tourism contributes substantially to the GDP of Rwanda, Kenya and Tanzania whose percentage contribution is higher than the EAC average of 9.5%. Furthermore, tourism contribution to total exports is highest in Rwanda and Tanzania which are above the EAC average of 17.0% (Table 2.2).

Table 2.2: Tourism percentage contribution to GDP and Export Earnings to EAC Partner States (2019)

Country	Percentage Contribution to GDP	Percentage Contribution to Export	Percentage Contribution to Employment
Burundi	5.1	1.5	4.4
Kenya	9.7	18.1	9.0
Rwanda	10.0	21.0	8.0
South Sudan	-	-	-
Tanzania	17.1	25.0	8.2
Uganda	5.6	16.6	5.8
Average	9.5	17.07.1	

Source: WTTC, 2019. South Sudan data not available

With regards to employment, the tourism industry significantly contributes to employment among the Partner States with a total of 4,066,900 both direct and indirect jobs. The highest total percentage contribution to employment is in Kenya (9%), followed by Tanzania (8.2%), Rwanda (8.0%), Uganda (5.8%) and Burundi (4.4%) as shown in Table 2.3 below.

11 *WTTC (2020) Travel and Tourism Economic Impact 2020 Reports, WTTC,*

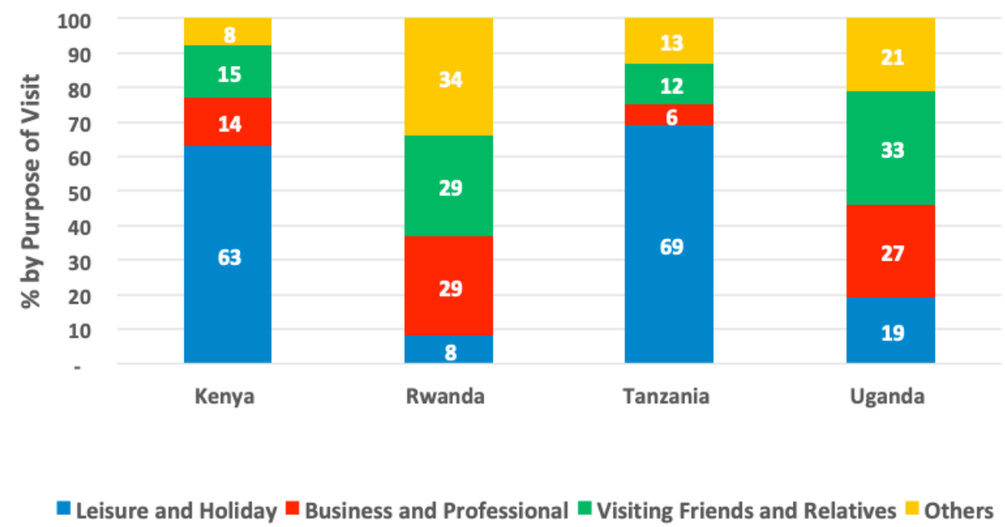
Table 2.3: Tourism contribution to employment of EAC Partner States (2019)

Country	Employment			Total % contribution to employment
	Direct	Indirect	Total	
Burundi	31,000	38,500	69,500	4.4
Kenya	650,750	928,750	1,579,500	9.0
Rwanda	130,850	200,350	331,200	8.0
Tanzania	674,800	875,300	1,550,100	8.2
Uganda	194,000	343,050	536,600	5.8
Total	**1,681,950**	**2,384,950**	**4,066,900**	**(Average) 7.1**

Source: WTTC, 2020. South Sudan data not available

2.3.3 Tourist arrivals in EAC countries by purpose of visit

Purpose of visit for the tourists varies across the Partner States. In 2019, Kenya and Tanzania received more holiday and leisure tourists (63% and 69% respectively) compared to Uganda and Rwanda with 19% and 8% respectively. Visiting Friends and Relatives (VFR) forms a substantial percentage of purpose of travel in Uganda and Rwanda as shown in Figure 2.5.



Source: Partner States statistical data sets (2017). South Sudan and Burundi data not available

Figure 2.5: Percentage distribution of international tourist arrivals in EAC countries by purpose of visit (2019 or latest data available)

2.3.4 EAC Market Segmentation

There is no standard tourism market segmentation used by EAC Partner States. For purposes of market analysis, this Strategy segments the source markets into three broad categories, that is, EAC Intraregional, Rest of Africa and the Rest of the World which are discussed here below:

2.3.4.1 Intra-EAC market

According to UNCTAD (2018), EAC is the second leading REC in Africa in terms of intraregional tourist arrivals with an average of 30% compared to SADC which is the leading REC with 65% intraregional tourists (Figure 2.6). Domestic and intraregional tourism among Eastern Africa countries remains an untapped segment[12] yet it has a very high potential of contributing to the sustainable development of the tourism sector.

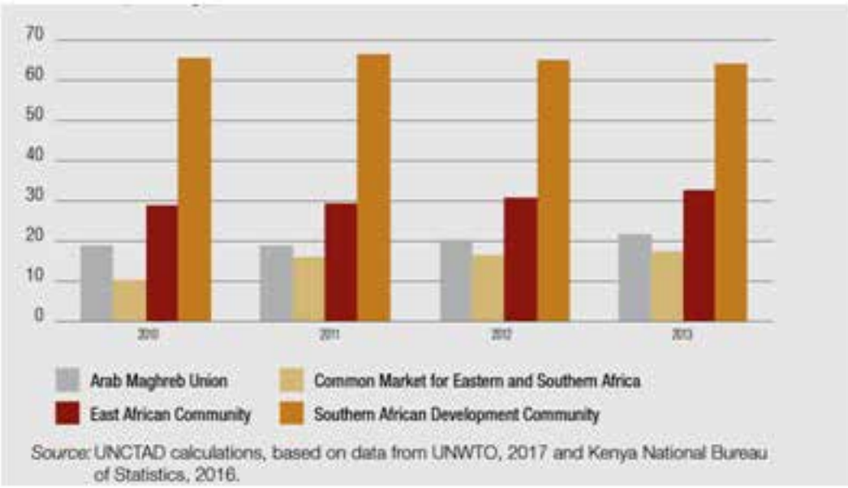
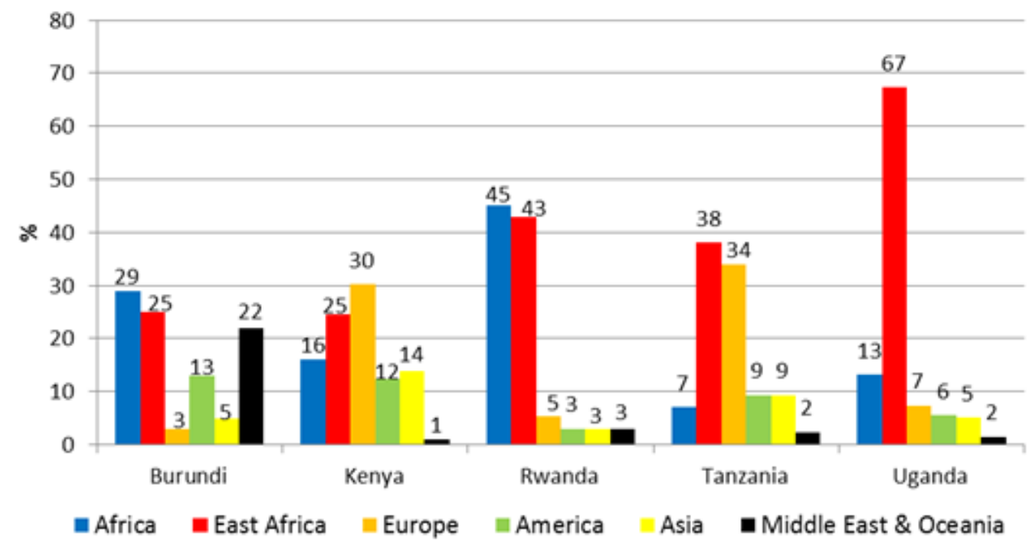


Figure 2.6: Intraregional tourist arrivals Percentage share of total international tourist arrivals in Africa, 2010–2013.

12 *Okello, M and Novelli, (2014) Tourism in the East African Community: Challenges, opportunities, and ways, Tourism and Hospitality Research, Vol. 14(1–2) 53–66.*

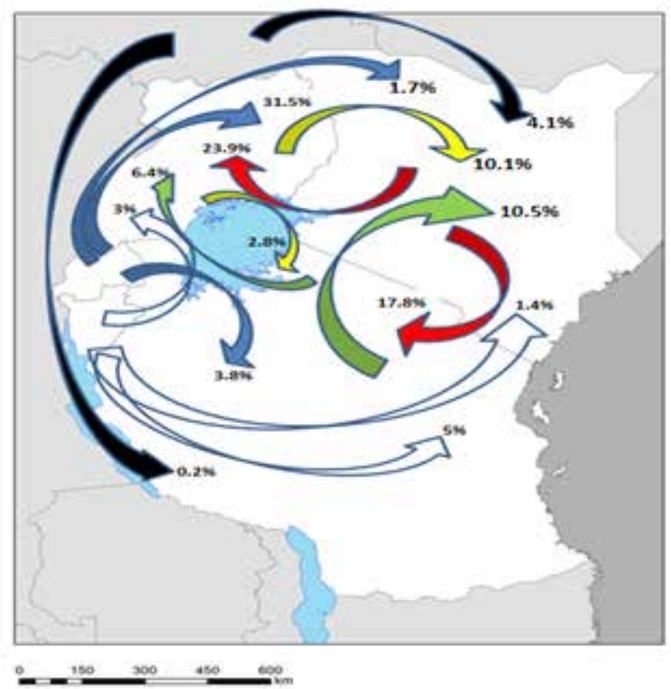
Tourism data for 2017 reveals that the intra-EAC arrivals substantially contribute to the Partner States total international tourist arrivals. For Uganda and Tanzania, EAC is the leading source market with 67% and 38% respectively. In the other countries, the EAC is the second key source market accounting for 25% in Burundi and Kenya 25%, and Rwanda at 43% as shown in Figure 2.7.



Source: National Statistical sources (2017). Data does not include those stated as 'Others'. South Sudan data not available

Figure 2.7: EAC countries source markets as a percentage of international tourist arrivals (2017)

In Uganda, EAC arrivals in 2017 were mainly from Rwanda (31.5%), followed by Kenya (23.9%), Tanzania (6.4%) and Burundi (3.6%). Data for Kenya reveals that the highest EAC arrivals were from Tanzania (10.5%), followed by Uganda (10.1%), Rwanda (1.7%), Burundi (1.4%) and South Sudan (1%). In Tanzania the majority of the EAC arrivals are from Kenya (17.8%), Burundi (5%), Rwanda (3.8%), Uganda (2.8%) and South Sudan (0.2%). In Burundi 51% of EAC arrivals were from Tanzania, 31% from Rwanda, 9% Uganda, 9% Kenya and 0.1% South Sudan. The intra-EAC travel is shown in Figure 2.8 here below:



Source: Partner States Statistical data sets (2017). South Sudan data not available

Figure 2.8: Intra-EAC tourists as a share of total international tourist arrivals of selected EAC countries - 2017/2018

The recent growth in intra-EAC travel has partly been as a result of a number of strategies that have been implemented at regional level, and they include; waiving of visa requirement for EAC citizens, use of national identity cards to travel across countries and establishment of preferential East African rates for entry into conservation areas among others. Existing campaigns to promote domestic travel within Partner states (Tembea Kenya, Tembera u Rwanda and Tulambule Uganda) seem to be encouraging travel beyond national orders. This presents a great opportunity upon which to develop a joint regional initiative to promote intra EAC travel.

In order to inform development of appropriate and effective marketing strategies, the Strategy segments and characterises the intra-EAC tourism market (Table 2.4). The main drivers of intra-EAC travel include business, visiting friends and relatives, meetings and conferences.

Table 2.4: Intra-EAC Market Segmentation, Characterisation and suggested marketing strategies

Market segment	Defining market segment characteristics	Strategy
Leisure & holiday tourists	• Segment steadily growing as middle class grows and travel culture picks up • Increasing family travels (middle age and children) with increasing travel of older couples • Shorter holidays – average of 5 days but some are same day visitors across borders • Mainly travel in festive seasons and public holidays • Last minute travel arrangements especially for same day visitors • Independent travel arrangements – limited pre-booking and use of tour operators • Mainly use road transport • Preference for urban and beach tourism but also increasingly engaging in Wildlife/ safari activities • Rely on word of mouth referrals and recommendations from friends and family • Mainly respond to discount deals/offers • Low to Mid-range accommodation • Increasing group travel	• Design products that are attractive to leisure tourists and families • Develop activities suitable for short stay visitors including excursionists • Develop social media based marketing content targeting individual and family travel • Establish Intraregional promotion campaign building on existing domestic tourism promotion drives • Enhance/build meta data online search systems • Ensure adequate internet connectivity to enhance 'word of mouth recommendation' through Social media • Enhance medium to communicate discount offers • Develop regional leisure tourism packages • Encourage group discounts and cost friendly packages

Market segment	Defining market segment characteristics	Strategy
Business tourists	• Short stays – mainly in urban settings and in business hubs/centres • Engage in urban tourism based activities – including entertainment activities • Seek for contemporary culture – cuisine, shopping • Limited engagement in nature/safari tourism • Budget accommodation (mainly) and Mid-range/business accommodation • Mainly use road transport but increasing trend in use of air transport	• Identify and integrate tourism in business and shopping hubs • Develop and market tourism activities suitable for short stay visitors • Develop social media-based marketing content targeting business tourists • Develop packages for business tourists

Market segment	Defining market segment characteristics	Strategy
Meetings, Incentives, conferences and Events (MICE)	• Travel mainly generated by regional meetings, workshops and conferences • Middle age (government employees, NGO's, academics) • Increasing religious based travels • Pre-arranged accommodation booking and travel arrangements by conference/ meeting organisers • Mid-range to high end accommodation • Shorter stays – 2 to 3 days • Limited time for leisure activities • Engage in urban tourism-based activities – nightlife • Potential high spenders • Mainly use air transport • Increasing incentive travel such as team-building	• Establish mechanism to coordinate and engage with MICE organisers and promoters • Ensure events and meetings are adequately published, coordinated and harmonized – with an annual calendar • Develop a flexible/extended travel arrangements (e.g flights) where tourism activities can be included in official program or be by individual arrangements • Develop and market tourism activities suitable for short stay visitors • Develop urban based and contemporary culture products and activities • Develop social media based marketing content targeting MICE tourists • Develop packages attractive to MICE tourists

Market segment	Defining market segment characteristics	Strategy
Visiting Friend and Relatives (VFR)	• High composition of intra EAC travel • Tend to have longer duration stays – one week and more • Limited direct spending • Short travels away from host home – visit towns, historical/religious sites • Limited engagement in nature/safari tourism	• Design products that are attractive to families • Develop activities suitable for short stay visitors including excursions • Develop urban based and contemporary cultural products and activities • Develop packages for domestic tourists • Enhanced communication by family and friends on packages

Market segment	Defining market segment characteristics	Strategy
Others		
Sports tourists	• Mostly youth and middle age • Can be categorised in active group (directly participating) and passive group (supporters) • Seasonal depending on sports events • Potential high spenders • Engage in urban tourism based activities • Budget and mid-range accommodation • Most intra-regional travel is by road but increasing travel by air especially for active group • Increasing travel by rail	• Establish mechanism to coordinate and engage with sports bodies, organisers and promoters • Ensure sports events are adequately published coordinated and harmonized – with an annual calendar • Develop urban based and contemporary cultural products and activities • Develop social media based marketing content targeting sports tourists • Develop packages for domestic tourists

Market segment	Defining market segment characteristics	Strategy
Education tourists	• Mostly school going age - youth • Organised education field trips • Engage in nature/safari tourism • Mostly short stays – but longer stays for students in formal secondary and higher education institution's • Budget travellers – limited spending • Hostel accommodation • Mainly travel by road	• Establish mechanism to coordinate with education institutions • Enhance youth travel through celebrity marketing – opinion influencers • Develop budget products and facilities • High use of internet based and social media marketing • Develop packages for education tourists

Market segment	Defining market segment characteristics	Strategy
Medical tourists	• Increasing travel to destinations with specialised hospitals • Travel is across all age groups • Travel two or three individuals – usually patient and attendant • Limited engagement in leisure activities • Mostly spend on medical related services • Budget and mid-range accommodation • Limited profiling of medical tourists	• Establish mechanism to coordinate and engage with health service providing organisations • Develop complementary activities – spa and wellness • Comprehensively profile and develop customised packages for medical tourists

Market segment	Defining market segment characteristics	Strategy
Religious Tourists	• Travel in relatively big groups • Travel in groups mainly on key religious events • Travel is across all age groups • Limited engagement in leisure activities • Mostly use road transport • Budget and mid-range accommodation	• Establish mechanism to coordinate and engage religious institutions • Diversify religious tourism products – beyond pilgrimage • Increase use of internet based and social media marketing • Develop packages for religious tourists

Market segment	Defining market segment characteristics	Strategy
Cultural Tourists	• Individual or small groups • Mostly visit rural communities • Budget and mid-range accommodation	• Establish mechanism to coordinate and engage with cultural institutions • Develop contemporary based cultural products • High use of internet based and social media marketing • Develop packages for religious tourists

Source: Expert knowledge and key stakeholder consultation

In order for intra-EAC tourism to flourish there is need to design strategies to encourage more travel including: developing tourism products that are attractive and encourage travel across individual countries; designing affordable tour packages; all countries applying preferential EAC rates for accessing tourist destinations such as national parks as well as facilities and services; leverage into the unfolding intra-EAC transport and development corridors; and establish measures to reduce air transport costs.

2.3.4.2 Rest of Africa

Continental and intraregional tourism in Africa is increasing and offers opportunities for economic and export diversification if its potential is exploited at the national and regional levels. Data shows that between 2010 and 2013, out of every 10 international tourists to Africa, four originated from Africa[13]. With a rise in disposable incomes and the increasing middle class on the continent, Africans are increasingly consuming tourism services both within and outside the continent. World Travel and Tourism Council (WTTC) data reveals that Africa's expenditure within the continent increased from USD 42.2 billion in 2016 to USD 48.7 billion in 2017 and is projected to reach USD 78.5 billion in 2028. On the other hand, outbound Africa's tourism expenditure also substantially grew from USD 30.3 billion in 2016 to USD 31.1 billion in 2017 and projected to reach USD 48 billion in 2028[14]. This reveals the need to design strategies to enable RECs such as EAC to tap into and harness this growing African market.

Available data for EAC Partner States (2012 to 2018) reveals that inspite of most marketing plans targeting overseas markets, Africa has over the years continued to be the leading source market. In Rwanda on average 79% of the international tourists are from Africa (including EAC). In Uganda the contribution of the African market is at an average of 78%, in Burundi its at 59%, in Tanzania 45% and in Kenya its 25% as shown in Figures 2.9 and 2.10. Trend analysis reveals that between 2012 and 2018, Africa has continued to dominate as the leading source market. Even when the arrivals from EAC are excluded, the rest Africa market still accounts for a substantial percentage of the total internnational tourism arrivals in most countries, that is, 45% in Rwanda, 29% Burundi, 16% in Kenya, 13% in Uganda 7% in Tanzania as shown in Figure 2.7.

In order to develop appropriate and effective marketing strategies for the Rest of Africa Market, the strategy segments and characterises the market as indicated in Table 2.5.

Table 2.5: Rest of Africa market segmentation, characterisation and suggested marketing strategies

Market segment	Defining market segment characteristics	Strategy
Leisure & Holiday tourists	• Segment steadily growing as middle class grows and travel culture picks up • Increasing family/couple travels (middle aged) • Average holiday length - one week • Organised travel – pre booking • Preference for urban but also increasingly engaging in Wildlife/safari activities • Rely on word of mouth recommendations from friends • Midrange and high-end accommodation • Travel mostly by air	• Design products that are attractive to African families/couples and leisure travellers • Develop social media-based marketing content targeting business and MICE travellers • Target MICE tourists and arrange flexible/extended travel arrangements where leisure and tourism activities can included on official arrangements or individually added on • Develop and market Afro-positive products and activities - based on contemporary culture • Establish continental promotion campaign building on intra-EAC promotion • Enhance/Build meta data online search systems • Ensure adequate internet connectivity to enhance 'word of mouth recommendation' through Social media • Develop packages for leisure tourists

13 *United Nations Conference on Trade and Development (UNCTAD) 2017, Economic Development in Africa Report 2017 – Tourism for Transformative and Inclusive growth, UNCTAD, New York.*

14 *WTTC (2018) Travel and Tourism Economic Impact 2018 Report, WTTC,*

Market segment	Defining market segment characteristics	Strategy
Business tourists	• Short stays – mainly in urban settings and in business hubs/centres • Engage in urban tourism based activities – including nightlife • Seek for contemporary culture – cuisine • Limited engagement in nature/safari tourism • Mid-range/business accommodation and high end • High potential spenders	• Identify and integrate tourism planning in business and shopping hubs • Develop and market contemporary/ urban tourism products and activities suitable for short stay visitors • Develop social media based marketing content targeting business tourists • Enhance tourism promotion through business magazines/professional magazines/websites • Develop packages for business and professional tourists

Market segment	Defining market segment characteristics	Strategy
Meetings, Incentives Conferences and Events (MICE) tourists	• High travel generated by regional and international meetings, workshops and conferences • Pre-arranged accommodation booking and travel arrangements • Shorter stays – 2 to 3 days • Limited time for leisure activities • Engage in urban tourism based activities – nightlife • Potential high spenders	• Establish mechanism to coordinate and engage with MICE organisers and promoters • Ensure events and meetings are adequately published coordinated and harmonized – with an annual calendar • Develop a flexible/extended travel arrangements (e.g flights) where tourism activities can included on official program or by individually arrangements • Develop and market tourism activities suitable for short stay visitors • Develop packages for MICE tourists • Develop urban based and contemporary culture products and activities • Develop social media based marketing content targeting MICE tourists

Market segment	Defining market segment characteristics	Strategy
Visiting Friend and Relatives (VFR)	• Increasing travel from neighbouring countries • Tend to have longer duration stays – one week and more • Limited direct spending – since they stay with family • Short travels away from host home – visit towns, historical/religious sites • Limited engagement in nature/safari tourism • Limited spending on accommodation since mainly stay with hosts • Limited profiling of tourists on VFR	• Design products that are attractive to individual travellers and families • Develop activities suitable for short stay visitors including excursionists • Develop urban based and contemporary culture products and activities • Develop packages for VFR tourists • Enhanced communication by family and friends on packages • Comprehensively profile VFR and design appropriate packages
Sports tourists	• Mostly youth and middle age • Can be categorised in active group (directly participating) and passive group (supporters) • Seasonal depending on sports events • Potential high spenders • Engage in urban tourism based activities • Budget and mid-range accommodation • Travel mainly by road but increasing travel by air • Increasing travel by rail	• Develop mechanism to coordinate and engage with sports bodies, organisers and promoters • Ensure sports events are adequately published coordinated and harmonized – with an annual calendar • Develop urban based and contemporary culture products and activities • Establish social media based marketing content targeting sports tourists • Develop packages for sports tourists

Market segment	Defining market segment characteristics	Strategy
Religious Tourists	• Travel in groups • Most travel on key religious events • Travel is across all age groups • Limited engagement in leisure activities • Mostly travel by air • Budget and mid-range accommodation	• Develop mechanism to coordinate and engage religious institutions • Diversify religious tourism products – beyond pilgrimage • Increase use of internet based and social media marketing • Develop packages for religious tourists
Cultural Tourists	• Individual or small groups • Mostly visit rural communities • Budget and mid-range accommodation	• Develop mechanism to coordinate and engage with cultural institutions • Develop contemporary based cultural products • High use of internet based and social media marketing • Develop packages for religious tourists

Source: Expert knowledge and key stakeholder consultations

For intra continental tourism to flourish there is need to address the key constraints which include; unharmonized tourism policies, visa travel restrictions (51% of Africans require visas to travel within the continent[15]), requirement for multiple currency conversions, high air transport costs, limited information about product offers in individual countries and civil strife, among others.

15 *African Development Bank (AfDB) 2018, African Visa Openness Report 2018, AfDB Abidjan.*

The Strategy notes that in all Partner States, intra-EAC and intra-Africa arrivals form nearly 50% of the arrivals therefore there is need to develop appropriate products and marketing strategies to tap into this market. UNCTAD[16] highlights the advantages of developing intraregional and continental tourism compared to international tourism from outside Africa. The advantages include;

1. Increased retaining of tourism income in the local economy through enhancing sector linkages hence limiting high degree of leakage from some market segments - leakage for developing countries is estimated between 40 – 50% of gross tourism earnings;

2. Higher levels of local spending given that intraregional and continental tourists are more familiar with the local context and most likely to spend more on local transport, entertainment, food and other services;

3. Reduces effects of tourism seasonality and contribute to more stable employment by providing more evenly distributed tourism arrivals across the year;

4. Boosts economic ties and business flows across countries;

5. Promotes greater social benefits including enhanced understanding and valuing of cultures which stimulates tolerance and contributes to peace among nations;

6. It provides supportive role to regional integration deepening as more citizens freely move across borders and socioeconomic opportunities are opened up; and

7. Market is more resilient to shocks such as negative travel advisories resulting from disease outbreaks, terrorism attacks among others.

16 *UNCTAD (2017) Economic development report for Africa*

2.3.4.3 Rest of the World

Statistics reveal that Europe and the Americas dominate as the key source markets from the rest of the world (Figure 2.9). In Kenya, Europe has been the leading source market between 2012 and 2016, contributing an average of 50% of the total international arrivals. However, in 2018 the European market share has declined to 30.2% and the African market has taken the lead at 40.7% of total international arrivals. The Americas market was at 11% between 2012 and 2016, slightly increasing to 12 % in 2017 and 2018. Although the Asia and Oceania source market share is still minimal, it posted an increase from 8% in 2017 to 16.7% in 2018. In Tanzania, Europe is the second largest key source market and has contributed an average of 32% of international arrivals between 2012 and 2017. The Americas and Asia each contribute an average of 10% to international arrivals with limited fluctuations of between 2012 and 2017. Middle East and Oceania is the least contributor with an average of 4%. In Burundi, Rwanda and Uganda, the Europe and Americas source markets do not significantly contribute to total international arrivals. This ranges between 9% and 2% with limited fluctuations between 2012 and 2017. However, in Burundi, the Americas market picked up between 2015 and 2017 with 16% average contribution to international arrivals.

Factors that could be responsible for stagnant and limited contribution from the Rest of World market include: high costs of air travel to and within East Africa; narrow product range; high costs of advertising; perceived negative destination image; negative travel advisories; and infrastructure deficits among others. Africa Visa Openness ranking (2018) reveals that limited visa openness is among the major constraints that limit international tourist arrivals in Partner States. The ranking in Table 2.6 reveals that the least ranked countries in EAC are South Sudan (48th/54) and Burundi (46th/54) compared to Rwanda and Uganda which are ranked 3rd and 5th respectively.

Table 2.6: Africa Visa openness ranking for EAC countries

Country	Score (1 is highest score)	Rank (n= 54)
Rwanda	0.86	3
Uganda	0.85	5
Kenya	0.84	9
Tanzania	0.69	18
Burundi	0.11	46
South Sudan	0.01	48

Source: AfDB (2018)[17]

17 *African Development Bank (AfDB) 2018, African Visa Openness Report, 2018, AfDB Abidjan.*

Available data (2016) for Kenya, Tanzania and Uganda reveals that the top key source markets within the Rest of the World market are United Kingdom, United States of America, India Germany, Italy France, Netherlands and Canada (Figure 2.11)

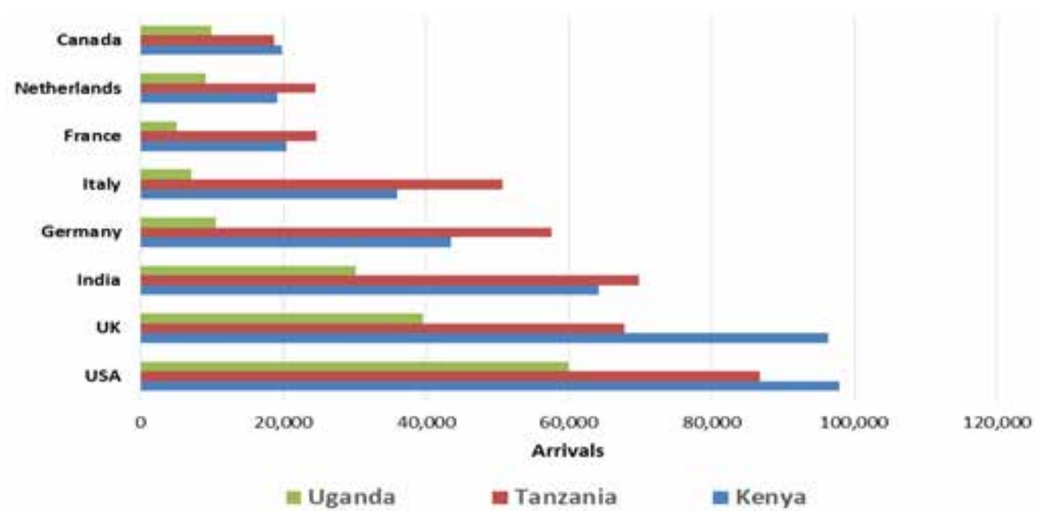


Figure 2.11: Top source markets for selected EAC countries from the Rest of the World (2016)

Key characteristics of Key source markets (2017)[18]

Highlighted here below are the key characteristics of the key international markets for EAC

United States of America (USA)

- Second top outbound tourism spender – USD Billion 135.2
- Among top Key source market for Kenya and Tanzania
- Average expenditure per capita – USD 415
- Out bound travel is structured and highly seasonal
- Long haul travel mainly middle aged and educate

18 *UNWTO (2018) World Tourism Barometer, vol.16.*

China[19]

- 129 million out bound trips, and expected to reach 160 million in 2020
- First top outbound tourism spender – USD Billion 257.7
- Average expenditure per capita – USD 185
- Africa currently accounts for a small share of Chinese travellers, but that number is growing
- Increasing demand for high-end package especially among mature travellers
- Increasing segment of tourists who mostly desire adventure in less travelled destinations such as Africa
- Travel decision mainly influenced by mobile apps and Online Travel Agency (OTA) websites
- Increasing trade and investment links with EAC region

Germany

- Third top outbound tourism spender – USD Billion 83.7
- Average expenditure per capita – USD 1015
- Among top key source market in Tanzania and Kenya
- Preference for organised package travel

United Kingdom

- Fourth top outbound tourism spender – USD Billion 63.4
- Average expenditure per capita – USD 960
- Among top key source markets in Kenya and Tanzania
- Preference for independent travel arrangements

19 *Alex Dichter, A., Chen,G., Saxon,S., Yu., J, Suo, P. (2018) Chinese tourists: Dispelling the myths. An in-depth look at China's outbound tourist market. McKinsey & company.*

France

- Fifth top outbound tourism spender – USD Billion 18.4
- Average expenditure per capita – USD 640
- Preference for arranging travels independent
- Increasing number of French travelling to Eastern and southern Africa

Italy

- Tenth top outbound tourism spender – USD Billion 257.7
- Average expenditure per capita – USD 445
- Preference for package tours
- Key source market in Tanzania and Kenya

India

- 17th outbound tourism spender – USD Billion 257.7
- Average expenditure per capita – USD 15
- Increasing out bound leisure travel
- Increasing travel to EAC region given historical and economic ties

The Strategy segments and characterises the Rest of the World tourism market as shown in Table 2.7. The main driver of this market is leisure and holiday.

Table 2.7: Rest of the World market segmentation, characterisation and suggested marketing strategies

Market segment	Defining market segment characteristics	'Reach and Convert' marketing approach/channels
Leisure & Holiday tourists	• Mostly engage in wildlife/safari tourism • Growing segment on cultural, historic and religious tourism • Organised travel – spend time arranging travel • Pre booking travel arrangements • Preference for historical culture • Mid-range and high-end accommodation • Adventure – off the beaten track • Rely more on online tourist reviews • Mostly travel by international airlines	• Ensure strong Regional and National marketing boards online presence • Engage Public Relations firms and market development representatives • Strengthen marketing through tour operators and their agents • Ensure strong and positive online reviews by offering quality services and facilities • Enhance capacity of missions abroad to promote EAC as a tourism destination • Develop social media-based marketing content targeting leisure tourists • Participate in International tourism trade fairs • Conduct road shows in key markets • Advertise in Newspapers/Lifestyle magazines/inflight magazines • Develop a new marketing brand, identify slogan and logo for EAC through a consultative process

Market segment	Defining market segment characteristics	'Reach and Convert' marketing approach/channels
Meetings, Incentives, Conferences and Events (MICE) tourist	• Travel mainly generated by international meetings, workshops and conferences • Middle age (government officials, NGO's, academia) • Pre-arranged accommodation booking and travel arrangements by conference/meeting organisers • Mid-range to high end accommodation • Average stay – 3 to 7 days • Limited time for nature-based leisure activities • Engage in urban and entertainment tourism-based activities • Potential high spenders • Mainly use air transport	• Develop mechanism to coordinate and engage with MICE organisers and promoters • Ensure that events and meetings are adequately published coordinated and harmonized – with an annual calendar • Develop a flexible/extended travel arrangements (e.g flights) where tourism activities can included in official program or by individual arrangements • Develop and market tourism activities suitable for short stay visitors • Develop urban based and contemporary culture products and activities • Develop social media-based marketing content targeting MICE tourists • Developing Packages for MICE tourists • Encourage repeat visits – but mainly as leisure and holiday tourists • Jointly bid to host Regional and International sporting events, cultural extravaganzas, mega international conferences and signature events under EAC brand once developed

Market segment	Defining market segment characteristics	'Reach and Convert' marketing approach/channels
Visiting Friend and Relatives (VFR)	• Increasing travel from EAC residents in the diaspora • Increasing travel to visit foreign residents • Tend to have longer duration stays – one week and more • Travels away from host home – average 4 – 7 days • Tourists visiting foreign residents mostly engage in nature/safari tourism and increasing engagement in cultural tourism • Diaspora tourists mostly engage in urban based and entertainment activities • Limited spending on accommodation since mainly stay with hosts • Mainly travel by air	• Design products that are attractive to families • Develop activities suitable for short stay visitors including excursionists • Develop urban based and contemporary culture products and activities • Developing packages for VFR tourists • Develop social media based marketing content targeting VFR tourists • Convert diaspora tourists into tourism ambassador's in their respective resident countries • Comprehensively profile VFR and design appropriate group packages

Market segment	Defining market segment characteristics	'Reach and Convert' marketing approach/channels
Cultural Tourists	• Individual or small groups • Mostly visit rural communities • Budget and mid-range accommodation	• Develop mechanism to coordinate and engage with cultural institutions • Develop contemporary based cultural products • High use of internet based and social media marketing • Developing packages for religious tourists

Source: Expert knowledge and key stakeholder consultations

2.3.5 Destination Competitiveness

World Economic Forum (WEF) determines a destination's Travel and Tourism Competitiveness (TTC) by measuring key indices, which include business environment; safety and security; policy and enabling conditions; infrastructure; and natural and cultural resources among others as shown in Table 2.8 below. Based on these indices, Table 2.8 below shows comparison between 2015 and 2017 in WEF ranking for EAC Partner States.

In 2017 Kenya is ranked position 80 compared to position 78 in 2015 thus showing a slight decline in competitiveness. Although Burundi was still the least ranked at 134th position out of 140 countries in 2017, it had slightly improved from the 135th position in 2015. Southern Sudan was not ranked in the report due to unavailable data.

Table 2.8: World Economic Forum, Travel and Tourism Competitiveness Index 2015 and 2017

WEF Key Indicators	Burundi		Kenya		Rwanda		Uganda		Tanzania	
Sub- Index	***2017***	***2015***	***2017***	***2015***	***2017***	***2015***	***2017***	***2015***	***2017***	***2015***
Business Environment	122	120	70	77	29	25	97	117	102	111
Safety & Security	111	112	129	131	9	51	104	109	92	100
Health & hygiene	111	113	120	121	112	111	130	135	125	136
Human Resources/ Labor market	119	129	76	77	58	84	115	104	131	110
ICT Readiness	136	135	106	103	109	112	119	118	121	123
Prioritization of Travel & Tourism	134	141	21	23	89	93	99	103	15	51
International Openness	128	67	70	73	81	78	69	72	64	62
Price Competitiveness	82	39	74	83	78	74	60	61	34	56
Environmental Sustainability	74	98	26	39	18	22	46	80	58	99
Air Transport Infrastructure	130	132	72	74	114	124	121	125	106	116
Ground and Port infrastructure	115	107	70	73	56	55	117	112	102	120
Tourist Service infrastructure	136	141	95	94	123	128	100	121	103	115
Natural Resources	129	134	15	11	78	76	44	45	8	7
Cultural Resources/Business Travel	130	128	77	65	115	117	79	82	86	74
Overall Ranking 2017 (out of 136) & 2015 (out of 141)	**134**	**135**	**80**	**78**	**97**	**98**	**106**	**114**	**91**	**93**

Source: World Economic Forum (2017). Ranking for South Sudan not available

Figure 2.12: Overall Global Tourism and Travel Competitiveness Ranking of East Africa Countries (out of 140 countries)

According to the TTCI reports, EAC countries are performing averagely well on indices such as having rich and diverse natural resources, appropriate tourism and travel policy, and setting up of enabling conditions which include government prioritisation of tourism, international openness and price competitiveness among others. However, EAC countries score low mainly on tourism infrastructure (air transport, ground and port infrastructure and tourism service infrastructure) and on the extent to which the region is exploiting cultural resources and tapping into business travel. This implies that in order to increase the competitiveness of the EAC region, these aspects need to be addressed.

Under the sub index of 'government prioritisation of travel and tourism', the WEF ranks countries on how effective their marketing and branding strategies are in attracting tourists. On a score scale of 1 – 7 (7 being the best score), the five EAC countries have varying global ranking. In EAC, Rwanda is the highest ranked (6th) out of 136 countries across the globe, followed by Kenya (25th), Tanzania (69th), Uganda (78th) and Burundi is the least ranked (115) - Table 2.9.

Table 2.9: Global ranking of EAC countries in effectiveness of tourism marketing and branding strategies

Country	Rank /136	Marketing Score (1-7 best)	Overall Competitiveness score (1-7 best)
Burundi	115	3.2	2.6
Kenya	25	5.2	3.6
Uganda	78	4.1	3.2
Tanzania	69	4.4	3.4
Rwanda	6	5.9	3.4

Source: World Economic Forum (2017)[20]

In general, the EAC has a huge potential of developing into a preferred tourism destination in Africa. This is evidenced by the fact that all EAC countries are increasing receiving international tourism and they being ranked higher in terms of their travel and tourism competitiveness. With Kenya, Rwanda and Tanzania ranked among the top 100 destinations across the globe points to the fact that the EAC has a strong foundation on which to develop a strong regional marketing strategy that can propel the region to gain a greater share of the global tourism market.

20 *World Economic Forum (WEF) 2017, Travel and Competitiveness Report 2017, WEF, Geneva*

2.4 Tourism Product Assessment

In order to inform the EAC tourism marketing strategy, there is need for a critical analysis of the current tourism products on offer, the marketing strategies being implemented, the branding of the region and an assessment of the institutional framework under which the strategy is being implemented. This strategy analyses these key issues and develops strategic actions on how they should be addressed.

2.4.1 Tourism Products – National Level

Tourism products at a national level form the foundation on which regional tourism development is built on. Through a stakeholder consultative process, existing and potential products for both the EAC and international markets were identified as shown in Table 2.10 here below.

Table 2.10: Key existing and potential tourism products in EAC Partner States

Country	Key existing tourism products	Products with appeal to EAC market	Potential products for International Market
VISIT BURUNDI **Burundi**	• Heritage tourism • Water based tourism – beach – Lake Tanganyika • Cultural tourism – cultural dances • Health tourism (Hot springs) • Sightseeing • Primates – chimpanzee tracking • Avi-tourism	• Cultural tourism – drums (UNESCO cultural heritage) • Gastro tourism (cuisine) • Water based tourism (L. Tanganyika, Southern most head waters of the Nile basin) • Sports tourism (golf) • Urban tourism • Adventure tourism (Sport fishing, hiking) • Primate watching • Snorkelling and Diving	• MICE • Ecotourism • Cruises – Lake Tanganyika

Country	Key existing tourism products	Products with appeal to EAC market	Potential products for International Market
Kenya	• Wildlife Safari • Beach tourism • MICE • Mountaineering • Medical tourism • Religious tourism • Urban tourism • Cultural tourism • Avitourism • Volunteering	• Beach tourism combined with new travel experience (SGR) • Urban tourism – shopping, entertainment, combine Nairobi Safari Walk park with City tour, ice skating, etc. • MICE tourism • Beach tourism combined with nightlife • Sports tourism (football) • Medical/wellness tourism • Homestays	• Cruise tourism • Cable cars (Mombasa) • Resort Cities • Sports tourism – (Golf, rugby, cricket) • Agro-tourism • Education and training-based tourism
Rwanda	• Primates • MICE • Water based tourism • Safari – wildlife • Cultural heritage • Religious tourism (Kibeho)	• Sports tourism • Historical tourism • Religious tourism • Water based tourism • Cultural tourism • Heritage tourism	• Sports tourism (Golf) • Adventure (para gliding) • Urban tourism (Shopping, city tours, entertainment • MICE • Education tourism • Film industry

Country	Key existing tourism products	Products with appeal to EAC market	Potential products for International Market
South Sudan	• Wildlife safari • Avi-tourism (Sudd wetland) • Business and professional tourism • Cultural and heritage - kingdoms • Sports tourism - traditional wrestling, football • Mountain climbing • Water based sports – rafting • Traditional dances	• Sports tourism • Heritage tourism – slave trade, Historical sites • Religious tourism • MICE	• Wildlife – migration of white Ear kob • Nile cruise – house boats • Tiang Mongalla gazelle
Tanzania	• Wildlife safari • Mountain safari • Beach holiday • Historical sites • Cultural tourism – contemporary culture • Trophy hunting • Eco Tourism (Nature based tourism)	• Mountaineering • Heritage tourism - Historical sites 7 UNESCO (4 Natural 3 cultural sites) • MICE • Agro-tourism • Beach tourism • Cultural events	• Cruise tourism • Rail tourism • Cultural routes – slave trade • Heritage tourism – sultan Bagashi • Medical tourism • Water based tourism – river based tourism, waterfalls

Country	Key existing tourism products	Products with appeal to EAC market	Potential products for International Market
EXPLORE UGANDA THE PEARL OF AFRICA **Uganda**	• Primate – gorilla and chimps • Birding • Adventure – water based and mountains • MICE • Cultural tourism • Religious tourism • Trophy hunting	• Religious tourism • Cultural tourism • Nightlife and entertainment • Education • Event tourism – Kampala Carnival , Nyegenyege, Luo conference • Sports tourism • Water based tourism - Source of Nile • Culinary tourism – Rolex, fish festival • Kingdoms based heritage	• Marine tourism – cruise • Cultural tourism – Gandhi site • Sports – golf • Culinary tourism • Agro-tourism

2.4.2 EAC Regional Tourism Products

Since 2008, EAC has jointly marketed itself as a single destination and tourism operators have responded and developed packages including a variety of products across the region. Product development is still market-led (focused on traditional markets) as opposed to being product-led (developing new products to target new markets). Important to note is that the products offered in the regional packages are still predominantly nature based and targeting the traditional high end 'western' markets.

Furthermore, the majority of tour operators offer a narrow range of similar nature based products with limited product differentiation and visiting more or less similar destinations within the various states. This creates a challenge for developing intra-regional tourism products since they will have less appeal to a wider market. Tourists will have less motivation to travel across the countries in the region for similar products and experiences. Most of the packages in the EAC tours include key nature based destinations including: Maasai Mara, Nakuru, Mombasa (Kenya) Serengeti, Ngorongoro, Kilimanjaro (Tanzania), Murchison Falls, Queen Elizabeth, Bwindi (Uganda) and Volcanoes, Akagera, Nyungwe (Rwanda). This implies that the operators target the same market segment from more or less the same sources market - hence creating high competition in a narrow market. More so, tour packages based on few key and popular destinations and attractions in each country implies that the less developed or known destinations do not benefit regional tourism. This scenario perpetuates unequal spatial benefits from tourism and limits the sector multiplier effect. Therefore, there is need to diversify tourism products and ensure a wide range of opportunities to involve stakeholders along the value chain including MSMEs and local communities. These include products in cultural tourism, religious tourism, sports tourism, gastro-tourism, health tourism, Meetings, Incentives, Conferences and Exhibitions (MICE) tourism among others. Some operators have developed niche products with an intraregional perspective – such as the East African bicycle tour where tourists ride across five countries, i.e. Burundi, Kenya, Rwanda, Tanzania and Uganda. Such initiatives should be supported, improved and provide lessons for the development of other regional tourism products.

In order to guide the product diversification process, the Strategy assesses the existing EAC tourism product potential (Figure 2.19) and conducts a product-market matching (Figure 2.20) to identify the potential source market and rate their preference for specific products. This analysis serves as a general guideline and Partner States will individually (based on their priorities) determine source markets and products to match them with. Partner States can further be guided by the market segmentation and suggested strategies in to Section 2.3.4 (EAC Market Segmentation - Tables 2.4, 2.5 and 2.7).

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	WILDLIFE BASED TOURISM	ADVENTURE	WATER BASED TOURISM	CULTURAL/ HERITAGE	RELIGIOUS/ PILGRIMAGE
Burundi	Wildlife Safari	Primates – chimpanzee tracking	Water sports swimming Cruise on L. Tanganyika	Cultural dances Drums festival Historical sites - Livingstone and Stanley meeting site	Mugera church
Kenya	Wildlife Safari -migration, Nairobi Safari Walk	Mountaineering Bungey jumping, zip lining	Beaches (Mombasa) Water Sports Cruises on Lake Victoria	Museums World Heritage sites (Fort Jesus, old Lamu town) Cultural (Bomas)	Religious sites
Rwanda	Primates – Gorilla, chimpanzee	Canopy walk Zip lining	Beaches kivu Cruises	Heritage corridor	Kibeho
South Sudan	Wildlife Migration	Rafting	River Nile cruises	Cultural dances and festivals	Missionary sites - Gondokoro
Tanzania	Wildlife Safari – migration Trophy hunting	Scuba diving Zip lining Paragliding Mountaineer-ing, Eco tourism	Coastal Beach activities Cruises on Lake Victoria	Museum , Historical sites, Heritage sites Coffee Culinary tourism	Nyakijoga Bukoba (Catholic)
Uganda	Primates – Mountain gorilla trekking, chimpanzee trekking, Birding, Butterfly watching, Big 5 wildlife safaris, Trophy hunting,	Rafting zip lining, ountaineering, bungee jumping	Beaches activities, River based activities – rafting, kayaking,	Kingdoms Cultural events --Imbalu festival -Food festivals	Uganda Martyrs Bahai temple

Source: Expert knowledge and key stakeholder consultation

High Potential | Average Potential | Low Potential

Figure 2.19: EAC Partner States tourism product potential

	URBAN TOURISM	MICE	MEDICAL/ / WELLNESS TOURISM	SPORTS TOURISM	EDUCATION TOURISM
Burundi	City tour Nightlife Cuisine	Meetings	Spas/ wellness	Football Water Sports	Education centres – Congo key catchment area
Kenya	Shopping –high end, Nightlife, Amusement/fun parks, ice skating City Tour	Meetings Conferences Events - Magical Kenya	Specialised Hospital - Cancer Hospital	Football Golf Rugby Cricket Marathon Safari rally	International Schools and Universities Specialised training – Utalii, Aviation, IT
Rwanda	City tour Shopping	MICE – Kwita Izina	Specialised Hospitals	Football,cycling, cricket, golf (Kigali Golf course)	Aviation IT
South Sudan	City tourism Trade	Meetings		Football	
Tanzania	City tour Shopping Nightlife	MICE - Karibu-Kilifair, SiTE, Zanzibar International Film Festival, Sauti za Busara and Zanzibar Tourism Show	Heart Hospital	Football Kilimarathon	Wildlife Management
Uganda	Nightlife and entertainment shopping	Leisure events, MICE Contemporary music/dance events POATE	Spa tourism - Hot Springs Specialised hospitals - Cancer	Football Beach sports Golf Kampala MarathonAnnual Wildlife Marathon Safari rally	Secondary and University Education

Region	EAC	Rest of Africa	Rest of the World							
Product			UK	Germany	France	USA	China	Gulf Countries	Italy	India
Wildlife Based										
Adventure										
Water based tourism										
Cultural/heritage										
Religious/ pilgrimage										
Urban tourism/ business tourism										
MICE										
Medical/Health/ wellness tourism										
Sports tourism										
Avi-tourism										
Visiting Friends and Relatives										
Education										

Source: Expert knowledge and key stakeholder consultation

Strong preference Moderate preference Weak preference

Figure 2.20: EAC tourism product-market matching

2.5 Tourism Marketing in EAC Region

2.5.1 Tourism Marketing at National Level

Tourism Marketing in the region is mainly done by National Tourism Organisations (NTOs) of individual Partner States, where each country positions itself to attract as many tourists as possible. Focus of most states is on ensuring product development, building human resource, enhancing tourism marketing, improve tourism facilities and service delivery. However, most national marketing strategies mainly focus on the international market as opposed to the domestic and regional markets in the EAC and Africa. Although most Partner States tourism frameworks acknowledge the importance of regional tourism cooperation and have laid some strategies, they are rarely implemented given the inadequate coordination at the regional level.

2.5.2 Regional Tourism Marketing

As stipulated by Article 115 of the EAC Treaty, the Partner States undertake to develop a collective and coordinated approach to the promotion and marketing of quality tourism in the region. To guide marketing of the region as a single tourism destination, a draft marketing strategy was developed in 2003. Under 'Destination East Africa' with tagline 'the more you see, the more there is to see' the draft strategy proposed to position the region as a premier destination in Africa with the key attributes as – Safari, Beach and Adventure Sports. It proposed a focus on the unique and vast natural resources, different, customs, beliefs, history and modern development.

The Draft Strategy proposed the following strategic actions:

a. Adopt Common Logo and Slogan for Destination East Africa

b. Reduce barriers to travel within the region – relax visa requirements

c. Host travel writers and TV/Film makers

d. Develop Multi – Country Circuits

e. Design and implement the 2006 'Visit East Africa' year Campaign

f. Develop the East Africa Tourism Website with links to national tourist boards and operator websites

g. Organise East Africa Travel Mart – Tourism Trade Fair

h. Training and Certifying travel agency personnel

The draft Strategy also proposed an organizational framework with an independent tourism coordinating unit with the mandate of harmonizing marketing of the region in collaboration with the national tourism boards. The Strategy underscored the need to have private sector involvement through national apex bodies forming a regional private sector tourism organisation. The Strategy further proposed that the East Africa Tourism Coordination Agency be formed to play a policy and supervisory role and allow the tourism coordination unit to operate on a business model.

Although the draft Strategy was not adopted, it apparently informed a number of marketing and promotion initiatives at the regional level. These include:

a. Marketing East Africa as a single destination under 'Destination East Africa' logo;

b. Joint tourism promotion in international trade fairs (i.e, World Travel Market in London, UK and Internationale Tourismus-Börse (ITB) in Berlin, Germany);

c. Having preferential rates for East Africans visiting public tourist attraction sites; and

d. Development and implementation of EAC classification criteria for tourist accommodation and catering establishments.

Given that the 2003 draft strategy was not adopted, the 7th Meeting of the Sectoral Council on Tourism and Wildlife Management held in March 2017 in Kampala, directed that a Regional Tourism Marketing Strategy be developed. This new marketing Strategy notes that the review is justified by the following;

i. Increase in EAC membership from three in 2003 to currently six members creating new opportunities and challenges;

ii. Changing trends in the domestic, regional and global tourism markets with emerging of new source markets in Asia such as China and India;

iii. Rethinking and a shift from public sector to private sector led marketing;

iv. Rapid digital technology initiatives that are changing tourism marketing approaches (e-marketing - social media marketing) and new digital based platforms (Uber, AirBnB, Booking.com, Jumia travel, etc);

v. Continued reliance on tourism marketing strategies of Partner States which are not harmonized at the regional level;

vi. Emerging regional infrastructure projects such as the Northern and Central Corridor infrastructural projects;

vii. Creation of a new supportive continental policy environment under the AU Agenda 2063 and the AU tourism Action Plan; and

viii. Increasing competition from other RECs offering similar products.

Addressing these trends and emerging issues call for a harmonized approach in order for the region to lay strategies to tap into the emerging markets, enhance synergies with the AU continental initiatives and leverage the new digital technologies.

In order to position East Africa as a preferred single destination, it was recommended that the region be jointly marketed as 'Destination East Africa'. To this end, a marketing logo was developed (Figure 2.21) and an array of promotion items including brochures, DVDs, fliers, Stickers among others were produced and mainly distributed at the main international tourism fairs attended by Partner States. However, the destination logo is not widely recognized in the key international source markets as well as within the EAC region. This may be mainly attributed to lack of comprehensive branding of the region as a single tourism destination.

Figure 2.21: Destination East Africa Logo

2.6 Summary of EAC Regional Tourism Marketing Strengths, Weaknesses, Opportunities and Threats

Based on the above situational analysis, Table 2.10 below highlights the strengths, weaknesses, opportunities and threats related to marketing EAC as a regional tourism destination.

Table 2.10: EAC Regional Tourism Marketing Strengths, Weaknesses, Opportunities and Threats

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
• Prioritisation of tourism and supportive policies at regional and national levels • Strong emerging national brands (Kenya, Tanzania Uganda, Rwanda) • Partner States marketing strategies with regional focus • Growing domestic tourism promotion programs in some Partner States • Eased travel within the region - One stop border posts • Diverse natural and cultural resources • Dedicated tourism institutional framework • Active tourism private sector players at national level – strong trade associations • Increasing private sector investment in tourism - accommodation facilities • Fairly well-developed nature-based tourism • Swahili language widely spoken in the region	• Limited product diversification • Limited multi-destination tourism products and packages • Unharmonized national marketing strategies • Inadequately coordination and implementation of regional marketing • Tourism skills and infrastructure deficit • Inadequate funding for regional tourism product development and marketing • Lack of EAC branding and perceived negative image • Limited research in product development and marketing • Limited and unharmonized tourism data collection and sharing • Political/Civil strife • Inadequate co-operation in tourism related crisis management and response mechanisms	• Untapped diverse tourism resources – culture, history, religion, etc • Increasing Middle class in EAC and Africa • Increasing access to mobile internet and mobile financial services (Mobile Money) • Increased availability of digital marketing technologies • Organised private sector • Emerging and conducive tourism policy and institutional environment at African Union • Willingness of development partners to support tourism sector development • Existing transnational products/packages • Varied public holidays across Partner States • Existing regional intergovernmental development projects – Northern & Central Corridor • Emerging new markets in Asia – China • Swahili language widely spoken in the region	• Climate change • Global economic changes • Disease outbreaks • Negative travel advisories • Terrorism • Threat to tourism resources - poaching, deforestation, loss of cultural/historical sites

In a nutshell, EAC is endowed with diverse and unique attractions with most of them still untapped. In addition, partner states prioritize tourism as a key socio-economic sector and have therefore put in place necessary national policies and strategies to guide its development and marketing. However, these policies and strategies are not harmonized at the regional level. The main weaknesses and threats facing the sector include limited multi-destination tourism product offerings, limited awareness of the region as a tourism destination, inadequate funding of tourism promotional activities and weak coordination mechanism.

By building on the strengths and opportunities and addressing the weaknesses and threats, EAC can substantially improve its tourism competitiveness in the regional and international markets. This marketing strategy provides a framework for developing multi-destination tourism products, joint promotional activities, branding, coordination and partnership arrangements. The vision, mission, guiding principles, strategic objectives, strategic directions and priority actions are set out in the ensuing section.

EAC Tourism sector in figures.

17.0%

Total Contribution to Export in 2019

6.98million

International arrivals in 2019

7.1%

Total contibution to employment in the EAC region in 2019

3.0 Strategic Direction.

3.1 Vision

To be the leading sustainable regional tourism destination in Africa

3.2 Mission

To develop and promote inclusive and sustainable intraregional and international tourism across the EAC region.

3.3 Strategic Objectives

The Partner States undertake to achieve the following objectives:

1. **Develop regionally and internationally competitive multi-destination tourism products offering high experiential travel;**
2. **Position and market EAC as a leading regional tourism destination in Africa;**
3. **Branding East Africa as a leading tourism destination;**
4. **Build institutional capacity of EAC secretariat and Partner States to effectively develop; market the region as a tourism destination of choice: and**
5. **Enhance financing for tourism marketing and promotion.**

3.4 Guiding Principles

1. **Develop intraregional tourism products involving more than one Partner State;**
2. **Ensure spreading of tourism benefits by involving SMEs, communities and other stakeholders;**
3. **Build institutional capacity of Partner State to develop and market regional tourism products;**
4. **Strengthen private sector capacity to develop regional products and undertake joint marketing;**
5. **Build a strong EAC tourism destination brand that takes into account Partner States unique identity and distinctiveness; and**
6. **Develop EAC as a competitive and sustainable regional tourism destination**

3.5 Strategic Objective and Actions

In order to achieve the vision, mission of this Strategy, the following strategic objectives and priority actions shall be pursued and undertaken:

3.5.1 Strategic Objective 1: Develop regionally and internationally competitive multi-destination tourism products

The existing multi-destination tourism products shall be improved in terms of their quality in a bid to enhance their competitiveness. In addition, the range of the multi-destination product offerings shall be increased in order to encourage more tourists to undertake visits that cover two or more countries within a single trip.

3.5.1.1 Priority Action 1: Enhance existing multi-destination tourism products

A comprehensive product mapping and profiling around key destinations and along the routes connecting them shall be undertaken. The identification process shall take into account international competitiveness of the products, their geographical distribution and thematic characteristics. Preliminary assessment results of the existing and potential product offer (Figure 10) indicate that a number of products can be enhanced for both the EAC regional market and the international market.

3.5.1.2 Priority Action 2: Develop new multi-destination tourism products

The multi-destination product offering shall be diversified by innovatively developing new products based on specific themes. The strategy proposes a number of themes based on which a variety of multi-destination tourism products can be creatively developed covering more than one Partner State. These include MICE, medical & wellness, sports and golf tourism that can be integrated into multi-destination product offerings to provide a wider range of products to the tourist and also enrich their experience. Emphasis shall be given to developing tourism products that are complimentary to each other rather than competing. To ensure widespread distribution of benefits, local communities and MSMEs in partner states shall be involved.

3.5.1.3 Priority Action 3: Develop Quality Standards and Certification Schemes

To guarantee high quality products, the existing standards criteria for classification of tourist accommodation establishments and restaurants will be reviewed and implemented by the Partner States. In addition, common standards for tour operators, tour guides and travel agencies among other tourism service providers shall be developed. An EAC regional eco-certification scheme shall be developed and implemented across partner states.

3.5.1.4 Priority Action 4: Liberalization of Trade in Tourism Services

Partner Partner States shall implement their commitments in the Common Market Protocol on progressive liberalization of services including hotels and restaurants and tour operators. Successful liberalization in these services will facilitate development and marketing of multi-destination tourism products.

3.5.1.5 Priority Action 5: Development of Tourism Support Infrastructure

To further enrich the regional tourism product offer, the unfolding infrastructure development projects in the region shall be leveraged. These include the Northern and Central corridors, the Standard Gauge Railway (SGR) projects and the One Stop Border Posts among others. Partner States shall also upgrade access roads to key tourist sites within the region.

3.5.2 Strategic Objective 2: Position and Market EAC as a Preferred Tourism Destination

3.5.2.1 Priority Action 1: Strengthening Existing Tourism Marketing Strategies

The existing national tourism marketing strategies shall be evaluated and strengthened in order to capitalize on key tourism markets including the regional market.. Marketing capacity gaps in Partner States shall be identified and addressed. At the regional level, a cost-benefit analysis of the current joint tourism marketing and promotional efforts shall be undertaken in order to enhance their effectiveness.

3.5.2.2 Priority Action 2: Identify key Source Markets for multi-destination Products

Under the product led development approach, new market segments shall be identified, profiled and aligned to the new products (product-market matching). In this regard, a comprehensive market survey shall be undertaken to facilitate clear understanding of the choices and preferences of each market segment and inform product-market matching. New market segments in the traditional source markets such as Europe and America as well as in the emerging markets such as China shall be identified.

3.5.2.3 Priority Action 3: Joint Packaging, Promotion and marketing of Tourism Products in the region

After accomplishing product-market matching, joint packaging and marketing of the tourism products shall be undertaken. This will involve designing joint packages where tourists can visit a number of destinations across different countries based on a specific thematic product or a combination of products. Cataloguing of the public tourist sites such as national parks and reserves as well as historical sites and museums together with respective entry fees shall be undertaken.

Appropriate promotion and marketing channels will be identified and deployed in different market segments. These will include joint roadshows and independent regional campaigns in order to effectively penetrate new markets internationally and regionally such as USA, China, South Africa and Nigeria among others. Efforts shall be made to build up on the existing domestic tourism promotion drives such as Tembea Kenya, Tembera u Rwanda and Tulambule Uganda into a stronger regional initiative.

Partner States and the Secretariat shall continue to participate in the key Tourism Fairs taking place in the respective Partner States including Magical Kenya, Pearl of Africa Tourism Expo, Karibu Kili Fair, Swahili International Tourism Expo, Kwita Izina Ceremony, Week of Drums, among others. In addition, a rotational joint EAC Tourism Fair shall be organized.

The capacity of NTO's, private sector and civil society organisations in Partner States shall be strengthened in order to produce quality and consistent marketing and promotional content that can be used by stakeholders across the tourism sector.

EAC and Partner states shall undertake influencer marketing by involve celebrities and renowned personalities in joint tourism promotion. Further, tourism diplomacy shall be strengthened by engaging EAC Missions abroad in marketing their respective Partner States and the EAC region as a tourist destination.

Partner States and the Secretariat shall undertake continuous media engagement towards promoting the region as a single destination and addressing adverse publicity.

3.5.2.4 Priority Action 4: Enhance Digital Marketing and E-platforms

Rapid digital technological advances provide vast opportunities to the tourism sector especially in marketing and promotion that need to be tapped into. In this connection, Partner States shall develop good quality and harmonized tourism digital content that is be aligned to EAC tourism web portal with links to Partner States marketing websites. The capacity of various stakeholders, especially NTO's and Private sector shall be enhanced in order to efficiently and effectively employ digital marketing techniques. Digital content standards and guidelines shall be formulated to guide how individual destinations can generate quality content and how to make use of it on various online digital platforms including social media. Digital technological tools and applications shall be explored and integrated in promoting and marketing tourism in the region. These include virtual reality, augmented reality, artificial intelligence, meta data based search tools, mobile devise optimised and geospatial enabled applications among others.

A digital based crisis management mechanism shall be established to provide timely and accurate communication about negative travel advisories, natural disasters, disease out breaks, among others.

For digital marketing to be effective, other supporting digital platforms shall be given priority and harmonized across the EAC region. These include internet services, telephone services and mobile money platforms among others.

3.5.2.5 Priority Action 5: Design Intra EAC Tourism Marketing and Promotion Campaign

An intra EAC travel promotion campaign shall be designed and implemented. The existing domestic tourism campaign shall be examined in order to identify best practices and challenges faced in order to inform the development of intra-EAC tourism promotion campaign. The campaign should revolve around the key drivers of intraregional travel including Visiting Friends and Relatives (VFR), meetings and conferences, and business are among others.

A coordination mechanism that will bring together the key stakeholders and experts to develop an implementation framework will be established. Focus shall be given to rolling out a strong awareness drive that should be digitally enabled with high use of social media and other effective marketing channels such as road shows.

3.5.3 Strategic Objective 3: East Africa Branding to become a preferred tourism destination

As revealed by the situational analysis there need to undertake comprehensive branding that communicates the diversity of the products and experiences in the region. To this effect a number of priority strategic actions are proposed.

3.5.3.1 Priority Action 1: Engage a Branding Agency

A professional and experienced branding agency to guide the EAC tourism branding process shall be engaged. As a means of ensuring inclusiveness and capacity building, the selected branding agency shall ensure high involvement of professionals from the EAC region. Among the key tasks of the agency is to define what makes East Africa a preferred unique, authentic and a must-see tourism destination. This will enable define what the EAC tourism brand promise is, design strategies to convey the promise and strategies on how to competitively position the region. Furthermore, the a logo and a tagline that will be used by all stakeholders to build awareness and market the region shall be developed.

3.5.3.2 Priority Action 2: Brand Audit of current Brand

The first step for the Brand agency is to conduct an audit for the 'Destination East Africa' brand. This will enable assess its performance by highlighting its effectiveness, level of awareness, challenges and lessons learnt. The audit is important since it will inform the process of rebranding the EAC as a preferred tourism destination in Africa.

3.5.3.3 Priority Action 3: Define EAC Brand Attributes

In order to develop an all representative brand, the attributes that define what East Africa represents or is able to offer as a destination shall be determined. The attributes should be aligned with the national branding and positioning of the EAC Partner States as tourism destinations. An EAC tourism brand should be able to communicate the diversity of the tourism products and experiences in the EAC region.

3.5.3.4 Priority Action 4: Brand Promotion and Communication Strategy

A brand promotion and communication strategy shall be developed to guide the Partner States in aligning their promotion and marketing efforts to the regional brand. In addition, a brand manual to help ensure that all stakeholders are conveying a consistent message to the market in a coordinated manner shall be developed.

3.5.4 Strategic Objective 4: Marketing and Institutional Framework

3.5.4.1 Priority Action 1: Institutional Capacity Building

In order to build a strong marketing and institutional framework at the EAC level, institutional capacity at Partner States level shall be enhanced. This will involve mainstreaming regional tourism development initiatives in respective Partner States tourism plans, standards, curricula and other tourism development frameworks. In relation to this, the capacity of tourism personnel that play direct or indirect roles in the tourism value chain shall be enhanced. These should include officials in tourism and hospitality training institutions, immigration (at key tourist entry and exist ports); police (tourism and traffic police), transport (air ports, sea ports and train station staff) and tour guides among others. Partner states with young and emerging tourism sectors should specifically be supported to develop tourism development and marketing plans that are aligned to the regional marketing strategy.

3.5.4.2 Priority Action 2: Strengthening the EAC Tourism Marketing Institutional Collaboration Framework

Capacity building shall be undertaken within the Department of Tourism and Wildlife Management at the Secretariat as well as for tourism marketing focal points at Partner States level. In addition, dedicated tourism working groups shall be created under the existing sectoral committee on tourism to focus on different critical areas, that is, Tourism Product Development; Tourism Marketing Promotion and Communication; Standards and Quality assurance; and Statistics, Research and Development. Further, the private sector shall be adequately involved through an umbrella regional tourism association.

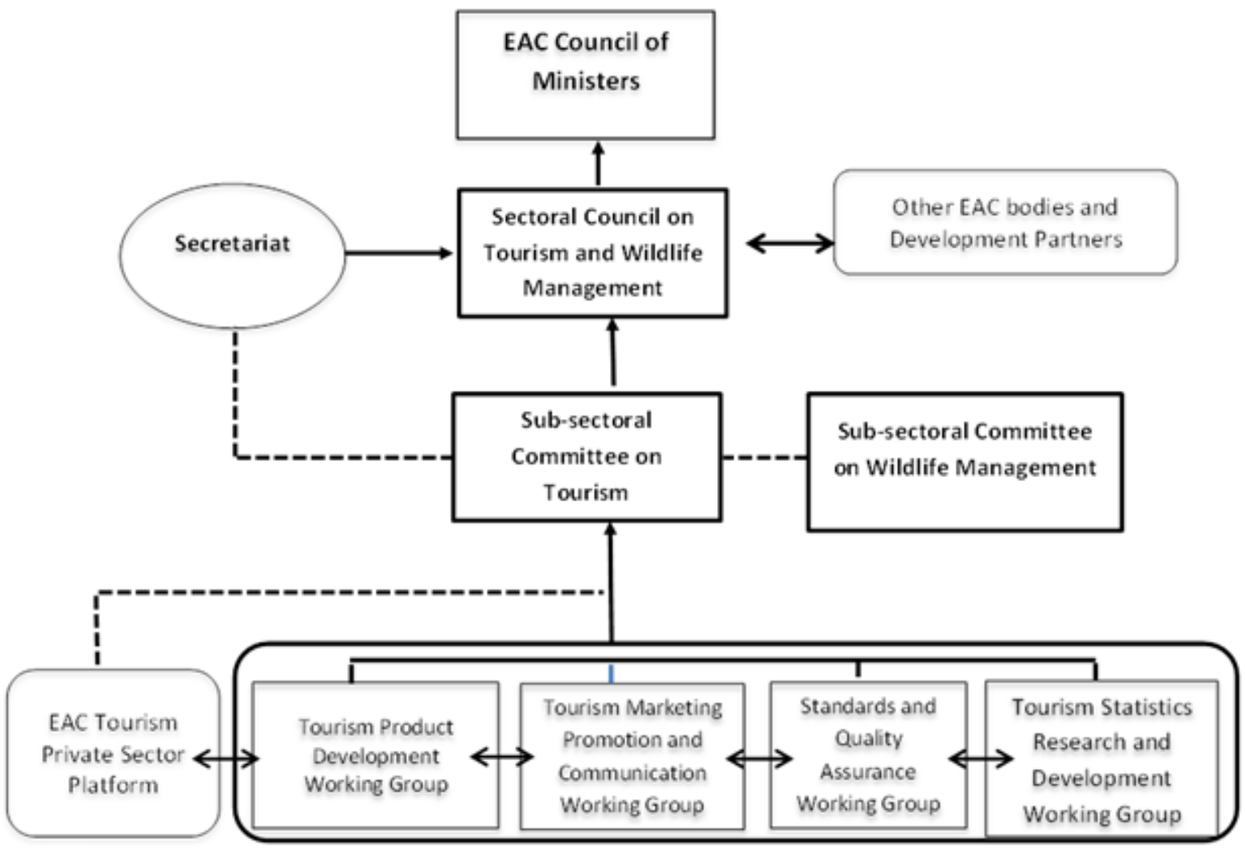


Figure 13: Proposed operational framework for the strategy implementation

The operational structure proposes the formation of aforementioned four technical working groups. These working groups should be composed of experts and practioners in the respective fields. They should be constituted for specific tasks and for a given timeframe after which they are dissolved. This ensures efficiency, timely outputs and reduces on financial resources required since members are not engaged on a full time basis. Reports produced by the working groups will be forwarded through the Sub-Sectoral Committee on Tourism to the Sectoral Council on Tourism and wildlife for consideration. The Tourism Statistics, Research and Development group should regularly conduct research and compile data from all over the region.

3.5.4.3 Priority Action 3: Regional Tourism Research and Statistics

A standard system to collect and analyse data shall be developed. It is recommended that all Partner States implement the Tourism Satellite Account (TSA) system that is the international best practice in order to ensure harmonized data sets that can be compared regionally and internationally. Capacity building will be undertaken in Partner states on adoption and application of a harmonized data collection system and methodology. In addition, an EAC Tourism Research Centre of Excellence shall be identified and regional tourism research network be established. The Tourism Research and Statistics Working Group in collaboration with the Secretariat shall undertake research regularly to inform policy decision making processes at the Regional level.

3.5.5 Strategic Objective 5: EAC Tourism Marketing and Promotion Financing

Limited financing has been one of the major challenges that face RECs and this affects the implementation of initiatives at a regional level. Different financing models have been tried out by various RECs including ASEAN, SADC and EU among others with varying levels of success. EAC Tourism programmes and activities including tourism marketing are normally funded through Partner States contributions and development partners' support.

3.5.5.1 Priority Action 1: Prioritize Tourism in Funding from Partner States Contributions

Funding from the Partner States contribution for tourism and wildlife activities is inadequate and has been declining despite the significance of the sector in the economies of the Partner States. In this regard, there is need for the Council of Ministers to consider prioritizing tourism in budgetary allocations in order to finance implementation of the key activities proposed in this Strategy.

3.5.5.2 Priority Action 2: Strengthen Resource Mobilization from Development Partners

Development Partners play a critical role in supporting implementation of programmes and activities at both the regional and national levels. However, there is need to strengthen resource mobilization efforts from relevant Development Partners to support different aspects of the Strategy.

3.5.5.3 Priority Action 3: Innovative Financing Mechanisms

To ensure successful implementation of the Strategy, support from the Private Sector shall be explored. Central governments and NTOs could closely engage private sector trade associations as well as individual private sector entities in their respective countries to co-finance key regional tourism marketing initiatives. Private Sector support at the regional level should be harmonized and coordinated by the East Africa Business Council (EABC) and the East African Tourism Platform. Sourcing of funding should not be restricted to private enterprises directly involved in tourism such as hotels, airlines and tour operators. It should also involve entities in other sectors that directly or indirectly benefit from the tourism sector such as telecommunications, financial institutions, manufacturing, among others.

4.0 Strategy Implementation & Monitoring.

4.1 Stakeholder Engagement

Successful implementation of the Strategy will highly depend on level of stakeholder coordination and involvement. The Strategy has identified a number of stakeholders and highlighted the roles they are expected to play. The stakeholders include the following:

National Tourism Organisations (NTO's)

The success of any regional initiative largely depends on the strength and responsiveness of institutions at national level. The implementation of the EAC marketing strategy will largely be implemented by the Partner States – mainly the NTO's in charge of tourism marketing, ministries of tourism, culture, heritage, natural resource conservation, among others. The roles of NTO's include;

i. Implement national marketing strategies that also cater for regional tourism and joint marketing;

ii. Disseminate the regional marketing strategy and communicate the desired outcomes of the Strategy to line Ministries, agencies and industry associations;

iii. Generate and provide national tourism content to use in the joint marketing of the region;

iv. Mobilise financial and human resources;

v. Coordinate and mobilise all stakeholders at national and local levels to contribute to regional marketing initiatives; and

vi. Identify and develop tourism products in-line with multi-destination regional thematic tourism products.

EAC Secretariat

The EAC Secretariat will coordinate the implementation of the marketing strategy at the regional level. The specific roles will include;

i. Disseminate the regional marketing strategy to Partner States;

ii. Coordinate the development of thematic multi-destination products;

iii. Coordinate monitoring and evaluation of the regional marketing strategies;

iv. Coordinate development and maintenance of content-rich EAC tourism marketing web portal;

v. Coordinate capacity building of Partner States (where required) to develop equivalently content-rich websites to link to the regional tourism web portal;

vi. Develop and maintain a media engagement mechanism through which regular press releases and updates are provided;

vii. Collate data and maintain a regional tourism database with annual or bi-annual statistical reports;

viii. Coordinate resource mobilisation initiatives to support regional tourism marketing; and

ix. Coordinate public-private sector partnership at regional level.

Ministries responsible for East African Community Affairs

The respective ministries in the Partner States will play a critical coordination role in implementation of the Strategy. In particular, they will:

i. Coordinate the linkage of the EAC Tourism Marketing Strategy implementation with all the EAC Organs and Institutions as well as with all the pillars of integration;

ii. Provide support in ensuring that regional tourism Strategy contributes to deepening regional integration in accordance the objectives of the EAC Treaty;

iii. Coordinate with line Ministries in Partner States to ensure East African Community citizens benefit from opportunities in regional tourism initiatives; and

iv. Enhance awareness of the EAC Tourism Marketing Strategy and rally for the active participation of Partner States public and private sector, civil society and other stakeholders in the implementation of the Strategy.

Private sector and Industry Associations

Tourism associations bring together a variety of stakeholders across the various tourism sub-sectors whose involvement is required for the successful implementation of the marketing strategy. These associations include those that bring together accommodation providers, tour operators, travel agents, tour guides, community based tourism organisations, transport, airlines, media, among others. The recently re-launched East African Tourism Platform should closely work with the East African Business Council (EABC).

In implementing the marketing strategy, the industry associations will;

i. Mobilise their membership to publicize and support the regional marketing strategy;

ii. Support regional tourism promotion campaigns;

iii. Mobilise private sector players in financing key marketing initiatives and promotions;

iv. Provide in-kind support to regional marketing programs;

v. Participate and make contribution in the various working groups and participate in meetings and workshops;

vi. Contribute to the collection and dissemination of tourism statistics in their respective tourism sub sectors; and

vii. Market and promote multi-destination products within and outside the region.

Technical Working Groups

The four working groups proposed in this Strategy will be constituted as and when need arises. They will;

i. Provide professional advice and technical support to the tourism and wildlife sectoral committees;

ii. Analyse research and statistical data to inform decision making processes; and

iii. Develop innovative approaches and models that can be applied in the enhancement of tourism product development and marketing.

Development Partners

The involvement of development partners is key in the successful implementation of this strategy. They include but not limited to international development organisations, regional organisations, academic and research institutions among others. All these partners will;

i. Provide technical support in the development and marketing of multi-destination tourism products;

ii. Support human resource capacity building initiatives especially in destinations and institutions;

iii. Enhance research and sharing of knowledge and good practices from within and without the region;

iv. Provide financial support to implementation of the strategy ; and

v. Ensure coordinated approach in their development assistance in respect to regional tourism development and marketing

4.2 Monitoring and Reporting

Monitoring and reporting will be conducted by the EAC Secretariat. This will involve tracking the performance of the individual Partner States in line with the agreed procedures and set targets. The secretariat will also coordinate and monitor the functioning of working groups based on the terms of reference for the specific assignments they will be handling. Based on the information collected, the Secretariat will compile regular reports that will be reviewed by the sectoral sub committees and key action points forwarded for consideration by the Sectoral Council. An annual report will be put together for consideration and endorsed by the Council of Ministers.

Given that changes are likely to occur during the implementation life cycle, the strategy will be considered as a living document – implying that adjustments will be made as and when need arises.

4.3 Critical success factors for implementation of the Strategy

Arising from the various stakeholder consultations, a number of critical success factors for the successful implementation of the Strategy were synthesised. They include:

i. Political will and support in implementation of Partner States Commitments under the EAC Common Market Protocol;

ii. Commitment from Partner States to fully embrace regional initiatives and build regional synergies;

iii. Maintaining safety and security and minimising conflicts in the region;

iv. Successful implementation of regional projects such as infrastructural corridor development projects – in railway, roads, energy among others to ease accessibility and service provision;

v. Adoption and full implementation of common EAC standards for classification of tourist establishments by all Partner States; and

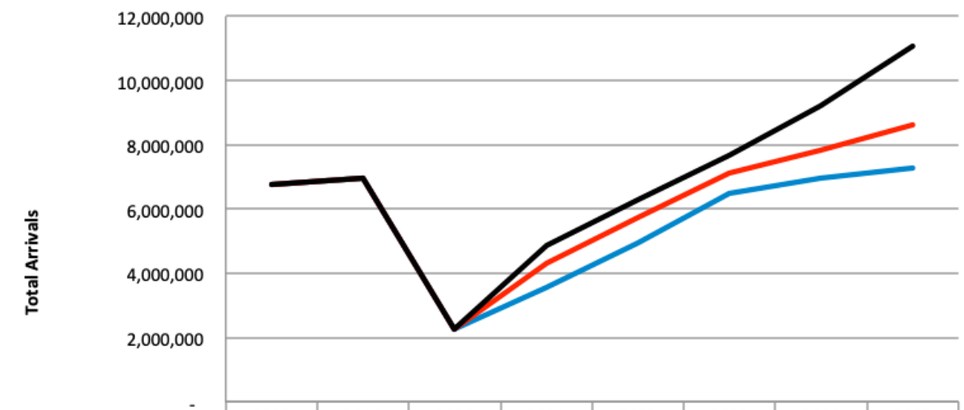
vi. High level of resource mobilisation through innovative financing mechanisms rather than over-reliance on Partner States contributions.

4.4 Regional Tourism Sector Projections

The The Strategy has developed tourist arrival and receipts projections based on three scenarios while factoring in the impact of COVID-19. These are: Business-as-Usual, Average Strategy implementation, Full Strategy implementation. Scenario 2 and 3 are built based on varying tourist arrivals percentage annual growth rates that were determined by a team of experts.

4.4.1 Total EAC Arrival Projections

Under the Business-As-Usual scenario the total tourist arrivals are projected to rise from about 6.98 million in 2019 to 7.29 million in 2025. If the marketing strategy is averagely implemented the arrivals could double from about 6.98 million in 2019 to 8.6 million in 2025. On the other hand, if the marketing strategy is fully implemented the arrivals are expected to more than double from 6.98 million in 2019 to 11 million in 2025.



	2018	2019	2020	2021	2022	2023	2024	2025
Bussiness as Usual	6,777,484	6,976,000	2,246,000	3,570,624	4,952,960	6,487,680	6,940,131	7,287,137
Average Implementation	6,777,484	6,976,000	2,246,000	4,325,120	5,720,320	7,115,520	7,827,072	8,609,779
Full Implementation	6,777,484	6,976,000	2,246,000	4,883,200	6,278,400	7,673,600	9,208,320	11,049,984

Figure 2.17: Total international tourist arrivals (Intra-EAC, Rest of Africa and World) arrivals growth scenarios based on varying levels of marketing strategy implementation

4.4. 2 Tourism Receipts Projections

Based on the 2019 tourism arrivals and receipts, the strategy makes projections of tourism receipts under the three different scenarios adopted by the strategy. Tourism receipts are projected to increase from USD 6.1 billion in 2019 to USD 8.6 billion in 2025 under the Business-As-Usual scenario, and to 9.2 billion under the average implementation scenario and 10.4 billion under the full implementation scenario as shown in Figure 2.18.

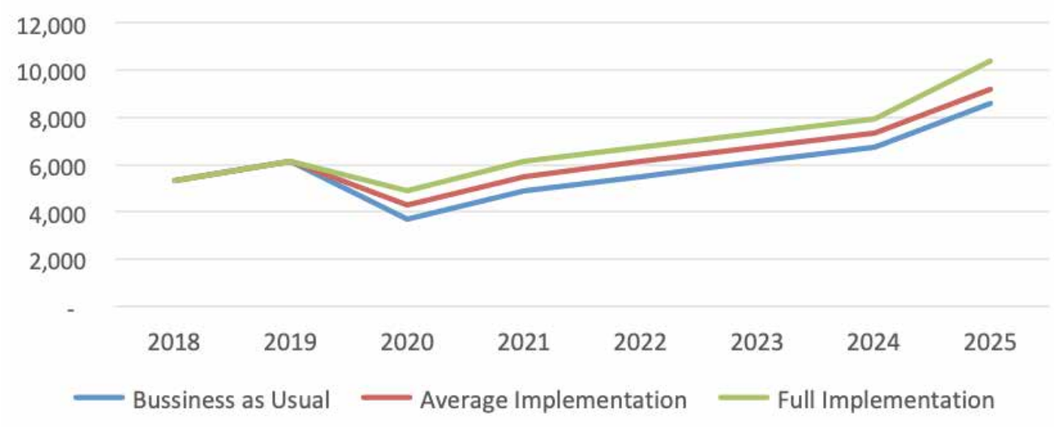


Figure 2.18: Tourist Receipts growth scenarios based on varying levels of marketing strategy implementation

4.5 Costs and Financing

The financing of this strategy will be in line with the EAC financing mechanism whereby Partner States contributions and financial support from development partners will be the main source of funding. In addition, the private sector players will be requested to support implementation of some of the aspects in the strategy. This include cash and in-kind contribution to regional tourism marketing and promotion initiatives. This has worked in other sectors such as the Energy sector whereby the biennial Petroleum Conference is mainly supported by private sector through sponsorship and payment of participation fees.

The indicative cost estimate to implement the strategy and a breakdown is given in Table 6.1

Table 4.1: EAC Marketing Strategy Implementation Matrix

Activities		Implementation Schedule						Responsible	Key Performance Indicator(s)	Estimated cost (USD '000)
		2021	2022	2023	2024	2025				
Strategic Direction 1: Development of Multi-destination Tourism Products										
Priority Action 1.1: Enhance Existing Multi-destination Tourism Products	Conduct a comprehensive product mapping and profiling							EAC Secretariat, Partner States	Database of all regional products compiled and profiled	800
	Develop regional product quality guidelines								Regional product quality guidelines developed	300
	Conduct stakeholder sensitisation on the developed regional product guidelines.								All tour operators and guides sensitised on the regional product guidelines.	600
	Improve multi-destination packaging								Quality of multi-destination packages improved	300
Priority Action 1.2: Develop New Thematic Multi-destination Tourism Products	Conduct comprehensive new tourism product mapping and profiling							EAC Secretariat, Partner States	New products mapped and profiled	200
	Design new products – with detailed content and circuits								20 new products designed	200
	Build capacity in product development and monitoring at national level								All national tourism marketing agencies trained on product development and monitoring.	600

Activities		Implementation Schedule						Responsible	Key Performance Indicator(s)	Estimated cost (USD '000)
		2021	2022	2023	2024	2025				
Priority Action 1.3: Develop Quality Standards	Review and implement the existing standards criteria for tourist accommodation establishments and restaurants							EAC Secretariat, Partner States	Standards criteria for tourist accommodation establishments and restaurants reviewed and implemented by 2022	300
	Develop and implement minimum standards for other tourism service providers							EAC Secretariat, Partner States	Minimum standards for tour operators, tour guides and travel agents developed and implemented	200
	Develop and implement a regional eco-certification scheme							EAC Secretariat, Partner States	A regional Eco-certification scheme developed and implemented	200
Priority Action 1.4: Liberalization of Trade in Tourism Services	Undertake liberalization of hotels and restaurants, travel agencies, tour operation services and tourist guide services as per Common Market Protocol commitments							Partner States	Hotels and restaurants, travel agencies, tour operation services and tourist guide services liberalized	500
Priority Action 1.5: Development of Tourism Support Infrastructure	Upgrade access roads to key tourist sites within the region							Partner States	Access roads to key tourist sites in the region	1,000
	Leverage the on-going infrastructure development projects in the region							Partner States	Number of tourism products and packages including the regional infrastructure	800

Activities		Implementation Schedule						Responsible	Key Performance Indicator(s)	Estimated cost (USD '000)
		2021	2022	2023	2024	2025				
Strategic Direction 2: Marketing and Promotion of Multi-destination Products										
Priority Action 2.1: Evaluate Current Joint Marketing Strategies	Strengthen Partner Sates marketing strategies and activities							Partner States	All national tourism marketing strengthened	60
	Conduct a cost-benefit analysis of current regional marketing approaches							EAC Secretariat, Partner States	Regional marketing Return-on-investment analysis undertaken .	30
	Identify and address tourism marketing capacity gaps in Partner States								Marketing capacity gaps identified and addressed in all Partner States.	20
Priority Action 2.2: Identify key Source Markets for Multi-destination Products	Design source market mapping and segmentation framework							EAC Secretariat, Partner States	Key source markets mapped and segmented	30
	Conduct market survey for the new products								At least Market surveys conducted for the new products	80
	Prepare comprehensive product–market matrix to guide marketing								Products appropriately matched to markets as a result of designed product-market matrix	15
Priority Action 2.3: Joint Packaging, Promotion and Marketing of Tourism Products in the region	Design joint thematic tour packages that interlink destinations across Partner States							EAC Secretariat, Partner States	Number Joint thematic tour packages developed. Various Partner States interlinked through joint thematic tour packages	800
	Identify and apply appropriate promotion and marketing channels for each market segment including international and regional Trade Fairs, Road shows, direct consumer campaigns among others								At least 6% annual percentage increase in tourism flows as a result of international and regional Trade Fairs, Road shows, direct consumer campaigns among others.	200

Activities		Implementation Schedule						Responsible	Key Performance Indicator(s)	Estimated cost (USD '000)
		2021	2022	2023	2024	2025				
Priority Action 2.3: Joint Packaging, Promotion and Marketing of Tourism Products in the region (*cont*)	Develop and distribute regional tourism promotional materials							EAC Secretariat, Partner States	Assorted promotional items produced and distributed annually.	300
	Build marketing/promotion capacity of NTO's and private sector including MSMEs in Partner States								Number of NTO's and private sector organisations that have benefited from marketing and promotion capacity building programmes.	600
	Develop and implement a regional tourism marketing audit and monitoring tool								Marketing audit and monitoring tool developed. Marketing audits undertaken annually.	15
Priority Action 2.4: Enhance Digital Marketing	Develop a content-rich EAC digital tourism marketing platform with an integrated communication mechanism							EAC Secretariat, Partner States	Content-rich digital tourism marketing platform launched by October 2020	2,000
	Build capacity of Partner States DMO's and private sector to adopt and apply digital marketing								All national tourism marketing agencies sensitized and trained	100
	Engage multiple social media platforms in marketing								An average of 20% annual increase in number of key social media metrics such as likes, shares, followings, engagements, etc.	500
	Build a public-private sector collaboration mechanism to enhance regional digital marketing								An operational public-private sector collaboration mechanism established by June 2023	150

Activities		Implementation Schedule						Responsible	Key Performance Indicator(s)	Estimated cost (USD '000)
		2021	2022	2023	2024	2025				
Priority Action 2.5: Design an Intra-EAC Tourism Marketing and Promotion Campaign	Benchmark best practices from Partner States domestic tourism campaigns							EAC Secretariat, Partner States	Familiarization tours conducted in each partner state to learn best practices on domestic tourism campaigns	30
	Design and undertake an Intra-EAC marketing and promotion campaign								Intra-EAC tourism marketing and promotion campaign developed and undertaken annually.Increased awareness and uptake among EAC residents of the tourism product offerings within the region. At least an annual increase of 10% in intra-EAC arrivals among Partner States.	1,500
Strategic Direction 3: Branding of EAC to become a Preferred Regional Tourism Destination										
Priority Action 3.1: Engage a Branding Agency	Engage a professional agency to develop an EAC regional tourism brand.							EAC Secretariat	TORs for branding agency developed and agency recruited by December 2021	40
Priority Action 3.2: Brand Audit of current Brand	Conduct brand audit of the region							EAC Secretariat, Partner States	Brand audit report undertaken by December 2021	10
Priority Action 3.3: Define EAC Brand Attributes	Conduct stakeholder consultations to generate content that defines EAC tourism							EAC Secretariat, Partner States	Content generated from each Partner State to inform the EAC brand	200
Priority Action 3.4: Brand development and Communication Strategy	Develop an EAC brand, brand manual and communication strategy								EAC tourism brand, brand manual and communication strategy developed	50

Activities		Implementation Schedule						Responsible	Key Performance Indicator(s)	Estimated cost (USD '000)
		2021	2022	2023	2024	2025				
Priority Action 3.5: Brand Promotion	Create EAC tourism brand awareness							EAC Secretariat, Partner States	Percentage of Brand awareness Number of companies using the EAC brand	1,000
Strategic Direction 4: Marketing Policy and Institutional Collaboration Framework										
Priority Action 4.1: Policy and Institutional Capacity Building	Organise regular national and regional stakeholder sensitisation fora to support regional tourism marketing								National and regional stakeholders' fora organised bi-annually.	600
	Build an institutional collaborative framework with other sectors to enhance regional tourism marketing								Multi sectoral institutional collaborative forum established	150
	Encourage partner states to implement policy and institutional reforms								Reforms undertaken by all Partner states	80
	Enhance Partner States institutional capacity to support regional tourism								Increased support for regional tourism marketing from Partner States	100
Priority Action 4.2: Strengthen the capacity of EAC tourism and wildlife department to coordinate the implementation of the strategy	Build capacity for human capital in the Department							EAC Secretariat, Partner States, Development Partners	Capacity building for EAC staff conducted Increased performance and efficiency	3,000
	Constitute and operationalise technical working groups to support EAC Secretariat							EAC Secretariat	Working groups constituted and operationalised	200

Activities		Implementation Schedule						Responsible	Key Performance Indicator(s)	Estimated cost (USD '000)
		2021	2022	2023	2024	2025				
Priority Action 4.3: Regional Tourism Research and Statistics	Build capacity of Partner States to adopt a harmonized tourism data collection methodology based on international best practices							EAC Secretariat, Partner States	Partner States adopt the harmonized tourism statistics methodology by 2023.	1,000
	Establish a regional tourism data and information sharing mechanism and system								Data sharing mechanism established and operationalised	100
	Identify East African Tourism Centres of Excellence and establish a Research Network								Tourism Centre of Excellence and Research Network established in each Partner State	1,000
Strategic Direction 5: Financing of EAC Tourism Marketing and Promotion										
Priority Action 5.1: Resource mobilisation for regional tourism marketing	Prioritize tourism in budgetary allocations under Partner States contributions							EAC Secretariat, Partner States	Increased budgetary allocations for tourism under Partner States contributions.	300
	Engage Development Partners to support regional tourism marketing								Funding from Development Partners mobilised and number MoUs signed. Number of projects supported by Development Partners for regional tourism marketing.	200
	Develop innovative funding mechanism							EAC Secretariat, Partner States, Development Partners	Number of Public Private Partnerships' regional marketing initiatives & activities funded.	150
Estimated Total Cost										**20,610**

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