

**EAST AFRICAN COMMUNITY
EAST AFRICAN LEGISLATIVE ASSEMBLY**



COMMITTEE ON AGRICULTURE, TOURISM AND NATURAL RESOURCES

**REPORT OF THE COMMITTEE ON THE OVERSIGHT ACTIVITY TO ASSESS THE
PERFORMANCE OF THE TOURISM SECTOR IN THE EAC**

25TH – 28TH OCTOBER 2021

**Clerk's Chambers
EAC Headquarters
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LIST OF ACRONYMS

ATNR	Agriculture, Tourism and Natural Resources
AU	African Union
COVID 19	Corona Virus Disease
EAC	East African Community
ERF	The Economic Recovery Fund
GDP	Gross Domestic Products
ICT	Information and Communication Technology
IDP	Integrated Development Project
IFF	Flora Fauna International
IUCN	International Union Conservation Nature
JATA	Japan Association of Travel Agencies
KRA	Kenya Revenue Authority
MICE	Meeting Incentives Conference Exhibition
MOT	Ministry of Tourism
MWCT	Ministry of Wildlife Conservation and Tourism (Republic of South Sudan)
NBR	National Bank of Business
NCAA	Ngorongoro Conservation Area Authority
NGO	Non-Governmental Organizations
RDB	Rwanda Development Board
RSP	Revenue Sharing Programme
SADC	Southern Africa Development Community
SMMEs	Small Medium and Micro Enterprises
TANAPA	Tanzania National Parks Authority
TAWA	Tanzania Wildlife Management Authority
UNDP	United Nations Development Programme
UNESCO	United Nations Educational
UNWTO	United Nations World Tourism Organization
UTA	Uganda Tourism Association
WCS	Wildlife Conservation Society
WHO	World Health Organization
WTTC	World Travel and Tourism council
ZCT	Zanzibar Commission for Tourism

1.0 BACKGROUND

Tourism is one of the most significant sectors in all the economies of the EAC Partner States. The sector contributes about 17% to export earnings, 10% of GDP and about 7% of employment in the region. Tourism provides a linkage with other sectors including agriculture, manufacturing, insurance, and finance.

According to Article 115 of the Treaty for the Establishment of the East African Community, Partner States undertook to develop a collective and coordinated approach to the promotion and marketing of quality tourism into and within the Community. In particular, Partner States undertook to:

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

The EAC recognizes that tourism sector is one of the sectors that has been dramatically affected by the outbreak of COVID 19. Taking into account the unparalleled introduction of travel restrictions, imposition of lockdowns and the closure of airports and national borders across the world have had a far-reaching impact on the tourism sector.

Data on tourism indicated decrease on the number of tourists arrived in all Partner States following the outbreak of the Covid 19 Pandemic. In most countries the number of arrivals decreased for more that 60%. This also resulted to the decrease of earnings from tourism for more that 50%, as well as unemployment to the sector and other related sectors.

In response to the negative impacts of the pandemic, the Sectoral Council on Tourism and Wildlife Management approved the EAC Regional COVID-19 Tourism Recovery Plan on 16th July 2021. The plan seeks to revive the sector that has been badly hit by the COVID-19 pandemic. The recovery plan is structured into Six (6) Pillars each with a number of interventions that shall be implemented within the immediate and the short terms to ensure quick recovery of the sector. The six pillars are:

1. managing the crisis;
2. product and market development;
3. development of tourism and hospitality standards;
4. human capital development;
5. tourism research and statistics, and
6. environmental sustainability of the tourism sector.

Some of the measures identified to implement the strategy include the creation of stimulus packages aimed at re-igniting travel and tourism sector and supporting tourism investments in the region, including the small and micro enterprises, adoption of collective and coordinated approach targeting tourism recovery that entails interventions aimed at reinforcing the measures being developed and implemented at national levels.

In the exercise of its oversight mandate, the Committee on Agriculture, Tourism and Natural Resource (ATNR) undertook an oversight activity to assess the performance of tourism sector in the EAC and the strategies taken by Partner States to revive the sector from the impacts of COVID 19.

2.0 OBJECTIVES

The main objective of this activity was to assess the performance of tourism sector in the EAC region and its recovery from the effects of Covid 19 pandemic. During this activity, the Committee was able to:

- i. understand the performance of the tourism sector;
- ii. find out the impacts of COVID 19 on the tourism sector; and
- iii. to assess the strategies adopted the Partner States for the recovery of the sector from the Covid 19 Pandemic.

3.0 METHODOLOGY

In undertaking this activity, the Committee conducted the following activities:

- i. Conducted meetings with officials from relevant public and private institutions in all the Partner States;
- ii. Visiting national park / tourist sites identified by the Committee in collaboration with the Partner States; and
- iii. Received presentation from the relevant authorities.

4.0 REPORTS FROM THE PARTNER STATES

4.1 REPUBLIC OF KENYA

4.1.1 THE TOURISM SECTOR AND THE COVID 19 PANDEMIC

In 2020, the travel and tourism contributed 4.2 billion U.S. dollars to Kenya's GDP. The contribution of the sector in 2020 declined by nearly 50% when compared to 2019. In 2019, the value added by the tourism sector to the economy reached 8.1 billion U.S. dollars. Tourism contributes to the high-priority goals of developing Kenya which are the generation of income, employment, and foreign-exchange earnings.

The outbreak of the COVID 19 pandemic in 2020, forced the Republic of Kenya to put in place the COVID 19 restrictions. The restrictions impacted negatively the tourism industry and the whole range of inter-linked services such as catering and airlines. Hotel bookings were also highly affected. It was noted that some of the lodges in the tourist sites closed operations. The ministry of tourism recorded a sharp drop of 57.9% in food and accommodation services in 2021, which costed the sector by 110 billion Kenyan shillings (about \$1 billion) as the revenue from tourism fell by 80%.

Before the pandemic, tourism and its related sectors employed more than 2 million people. As consequences of the pandemic, many people either lost their jobs or earned reduced salaries. A survey of key stakeholders in tourism sector held in 2020 found that slightly more than 80% of companies engaged in the sector had reduced the number of their employees. Moreover, 31.9% of the companies reducing the salaries of the remaining employees by over 70%.

4.1.2 GOVERNMENT'S EFFORTS FOR THE RECOVERY OF THE TOURISM SECTOR

The Committee was informed that the Government of Kenya through the various stages of the pandemic-related health and economic crises, responded with a number of initiatives to sustain its effects to the economy. These include:

- i. Development of elaborate Tourism and Hospitality Covid-19 Protocols, and enforcement of the same by the Ministry of Health and the Ministry of Tourism and Wildlife through the Tourism Regulatory Authority;
- ii. Cooperation with financial institutions to allow flexible loan repayment terms for those in the tourism sector and other investments;
- iii. Categorization of tourism and hospitality workers as front liners and they were given preference in the COVID 19 vaccination exercise;
- iv. Provided incentives to boost domestic tourism;
- v. Retention of partially opened COVID 19 protocol compliant hotels and eateries to allow take-aways, deliveries and sale of drinks for residents within their own hotel rooms even during the peak of the pandemic;
- vi. Issuance of KRA Covid-19 compliance certificate and stickers to compliant establishments and services to boost tourist confidence in the destination Kenya; and
- vii. Sector incentives through recommendation for duty exemption and waiver for goods under the EAC Customs Management Act.

4.1.3 DATA ON ARRIVAL OF INTERNATIONAL TOURISTS

The number of international arrivals is indicated in the tables below.

Table 1: Total number of tourist arrivals

PURPOSE OF VISIT	2020 (Aug-Dec)	2021 (Jan to Sept)
BUSINESS AND MICE	58,164	153,419
TRANSIT	11,069	26,407
MEDICAL	2,154	6,001
RELIGION	1,114	5,008
SPORTS	398	1,522
EDUCATION	3,734	14,722
HOLIDAY	41,054	193,386
VISITING FAMILY OR FRIENDS	59,151	170,772
TOTAL	176,838	571,237

Source: Presentation by the Government of Kenya before the Committee

Table 2: Number of tourist arrivals and their origin

2020 JAN- DEC	COUNTRY	NO. OF ARRVALS
1.	Uganda	69,378
2.	USA	65,377
3.	TANZANIA	54,046
4.	UK	49,828
5.	INDIA	29,746
6.	GERMANY	19,833
7.	RWANDA	17,043
8.	CHINA	16,329
9.	FRANCE	15,590
10.	ITALY	15,040
2021 JAN – SEPT.	COUNTRY	NO. OF ARRVALS
1.	USA	97,177
2.	Uganda	51,306
3.	United Republic of Tanzania	51,079
4.	United Kingdom	27,023
5.	India	26,740
6.	China	25,814
7.	Pakistan	20,331
8.	Somalia	17,287
9.	Rwanda	16,896
10.	Germany	16,088

Source: Presentation by the Government of Kenya before the Committee

The total tourism receipts from international tourists are estimated to have closed at Ksh 88.567 billion against projected earnings of Kshs. 336.228 billion. Domestic tourist bed nights closed at 1,845,000, a reduction of 61.7% in comparison to 2019 which were 4,818,600.

4.1.4 TOURISTS FROM THE EAC PARTNER STATES

There were 140,633 tourists arrived in Kenya from other Partner States as indicated in the table below.

Table 3: Number of Tourist Arrivals from the EAC Partner States

2020 JAN- DEC	COUNTRY	NO. OF ARRVALS
1.	UGANDA	69,378
2.	TANZANIA	54,046
3.	RWANDA	17,043
4.	BURUNDI	9,842
5.	SOUTH SUDAN	9,552
	TOTAL	159,861
2021 JAN – SEPT.	COUNTRY	NO. OF ARRVALS
1.	UGANDA	51,306
2.	TANZANIA	51,079
3.	RWANDA	16,896
4.	SOUTH SUDAN	12,273
5.	BURUNDI	9,079
6.	TOTAL	140,633

Source: Presentation by the Government of Kenya before the Committee

4.1.5 STANDARDIZATION AND CLASSIFICATION OF TOURIST FACILITIES AND SERVICES

The Committee was informed that the Republic of Kenya standardized and classified 215 tourism facilities and services using the current EAC classification criteria. The following is the outcome of the classification of the 215 establishments.

Table 4: Standardization and Classification of Tourist Facilities in Kenya

Sn	Class	Available Facilities
1	Five Stars	24
2	Four Stars	67
3	Three Stars	63
4	Two Stars	58
5	One Star	3

Source: Presentation by the Government of Kenya before the Committee

4.1.6 VISIT TO THE NAIROBI NATIONAL PARK

The Committee visited the Nairobi National Park which is famous for being the only Park within a city in the world. It is also the oldest national park in East Africa, *gazetted* in

1946. This park is unique because it is the only protected area in the world with a huge variety of animals and birds close to a capital city. It is a principal attraction for visitors to Nairobi and serves many local residents. The park hosts four out of the “big five”, which are the black rhino, leopard, lion and buffalo. It is unable to host elephants because it is small with insufficient woodland. The vegetation in the park is generally wide-open grass plains and scattered acacia bush that host to a wide variety of other wildlife including hyenas, giraffes and diverse birdlife with over 400 species recorded.

The Committee also visited the burning site where elephant tusks and rhino horns are destroyed. The Committee noted that this was one the most important landmarks in the animal conservation. In 1989 the late president Daniel Arap Moi made a statement to poachers by setting fire to 11 tons of seized ivory. The event improved Kenya’s conservation image at a time when East African wildlife was being decimated by relentless poaching. In 2016, president Uhuru Kenyatta oversaw the burning of 100 tons of ivory at the same site, amounting to the tusks from 6000 elephants which is about 5% of global ivory stocks.

While visiting the national park, the Committee was informed that the Republic of Kenya had strategies to develop domestic tourism. Domestic tourism provides critical support to tourism industry in several areas of performance including seasonality, regional dispersal and increased domestic spending.

4.2 THE UNITED REPUBLIC OF TANZANIA

The oversight activity in the United Republic of Tanzania held in Zanzibar. Zanzibar is an archipelago composed of 2 main islands and over 50 small islands. The archipelago comprises a cosmopolitan population of African, Persian, Portuguese, Arabs, and Indian descent. Following the 1964 Revolution and the Union with Tanganyika, Zanzibar is currently a semi-autonomous part of the United Republic of Tanzania.

The Committee interacted with stakeholders from the government of the United Republic of Tanzania and from the Revolutionary Government of Zanzibar. It also

engaged with stakeholders from private sector and visited the Stone Town Tourists site. It also held an interactive meeting with the Minister for Tourism and Heritage of Zanzibar.

4.2.1 THE PERFORMANCE OF THE TOURISM SECTOR IN TANZANIA

The Committee was informed that for the past 10 years, the tourism sector grew at an average annual rate of 8% and over 25% of total export earnings. In 2019, Tanzania received 1,527,230 tourists and generated more than US\$ 2.6 billion. The sector accounted for nearly 1.6 million direct and indirect jobs. For the year 2020, Tanzania projected to receive 1,867,000 international visitors.

Table 5: International Arrivals, Monthly (2016-2020)

Month	2016	2017	2018	2019	2020
January	95,127	121,280	133,795	120,503	132,684
February	92,475	101,168	107,835	122,929	137,204
March	94,345	98,295,	123,256	108,323	66,581
April	76,558	86,652	92,876	95,213	7,105
May	76,770	78,016	91,374	87,407	4,529
June	92,077	92,442	117,802	121,174	9,671
July	119,140	131,583	148,557	156,838	17,136
August	126,054	131,388	157,312	163,910	24,863
September	122,350	110,962	150,953	147,877	29,863
October	135,314	122,289	120,762	132,734	41,740
November	123,895	109,211	111,859	124,852	61,183
December	130,174	143,857	149,321	145,470	87,605
Total	1,284,279	1,327,143	1,505,702	1,527,230	620,867
Annual Change	-	42,864	178,559	21,528	-906, 363
Annual Change %		3.3	13.5	1.4	-59.3

Source: Ministry of Natural Resources and Tourism – URT

Table 6: Tourist Arrival and Revenue (2010-2020)

YEAR	Number of Tourist	Average change (%)	Revenue (US\$ mill)	Revenue (TZS) 000,000
2010	782,699	9,5	1,254.50	1,767,967.85
2011	867,994	10.89	1,353.29	2,107,613.85
2012	1,077,058	24	1712.75	2,691,929.18
2013	1,095,884	1.7	1,853.28	2,962,653.49
2014	1,140,156	4	2,006.32	3,316,647.59
2015	1,137,182	-0.26	1,901.95	3,774,443.94
2016	1,284,279	12.1	2,131.57	4,640,641.05
2017	1,327,143	3.2	2,258.96	5,040,191.55
2018	1,505,702	11	2,412.30	5,855,154.48
2019	1,527,230	1.4	2,604.46	6,057,453.07
2020	620,867	-59.3	714.59	1,636,339.64

Source: Ministry of Natural Resources and Tourism – URT

4.2.2 THE OUTBREAK OF COVID 19 PANDEMIC IN TANZANIA

Tanzania announced the first case of COVID-19 on 16th March, 2020. The outbreak of COVID-19 brought the world to a standstill and tourism was the worst affected of all major economic sectors. Major source markets including Europe, Asia, America and the Middle East, were among the hardest hit. The sector witnessed lockdowns and travel bans in most of major tourist markets and airlines missed passengers and cancelled flights to many destinations in the world including Tanzania. This resulted to the decrease of tourists from 1,527,230 in 2019 to 620,867 in 2020 (59% decrease). The foreign exchange also decreased to 789.26 million dollars from 2.6 billion dollars. On employment there was a redundancy of 404,850 employees from direct jobs. The income of Ngorongoro Conservation Area Authority (NCCA) dropped by 89%, while the income of Tanzania National Parks Authority (TANAPA) dropped by 90%. The government revenue dropped by 726.472 billion which was 72.5% decrease.

4.2.3 KEY INTERVENTIONS NATIONALLY AND GLOBALLY

4.2.3.1 GLOBAL INTERVENTIONS

The global interventions included efforts made by the World Tourism Organization (UNWTO), the United Nations Development Program (UNDP), the World Health Organization (WHO) and the World Travel & Tourism Council (WTTC). The global interventions included the following:

- i. Issuing of guidelines and technical guidance in dealing with COVID-19;
- ii. Humanitarian assistance (medical equipment, medicines and monetary support);
- iii. Joint approach re-establishing effective approach, remove travel barriers and reopen borders;
- iv. Working with health experts in defining global standards for the new normal of travel; and
- v. System of recognition and certification "Safe travel stamp."

4.2.3.2 REGIONAL INTERVENTIONS

The regional interventions comprised efforts by the African Union (AU), the East African Community (EAC) and the Southern Africa Development Community (SADC). The regional interventions included the following:

- i. Formulation of Covid-19 Response Fund to mitigate socio-economic and humanitarian impact of Covid-19;
- ii. Reopening of the skies to facilitate mobility;
- iii. Guidelines on harmonization and facilitation of cross border transport operation;
- iv. Establishing of National Emergency Operations Centers;
- v. EAC Covid-19 Tourism Recovery Plan;
- vi. Administrative guidelines to ensure smooth and uninterrupted movements of good and services; and
- vii. Covid-19 Response Plan to reinforce national measures to protect and prevent spread.

4.2.3.3 NATIONAL INTERVENTIONS

The national interventions involved government agencies and private sector. The following are some of the national interventions that were adopted by the United Republic of Tanzania:

- i. Rapid Assessment of the Impact of COVID-19 on the Tanzania's Tourism Sector to ascertain the magnitude of the impact and propose immediate measures to rescue the sector;
- ii. National Standard Operating Procedures for the Management of COVID-19 in the Tourism Business Operations (SOPs);
- iii. The Ministry of Natural Resources and Tourism in collaboration with the Private Sector and Development Partners donated COVID-19 protective gears and conducted health and safety training sessions to the tourism stakeholders;
- iv. Media campaigns e.g., *#TanzaniaIsReady*, to show Tanzania's readiness to receive tourists;
- v. COVID-19 Vaccine campaign in tourism;
- vi. Issuing of Travel advisory from time to time; and
- vii. Waived some fees charged by TANAPA, NCAA & TAWA in order to rescue investors in the conservation areas, e.g.:
 - a) TANAPA waived park fees for crew and vehicles stationed in the seasonal camps;
 - b) TAWA extended tenure of hunting blocks; and
 - c) NCAA waived entry fees for camp staff and vehicles.

4.2.4 RECOVERY OF THE TOURISM SECTOR

The government of Tanzania through the Ministry of Natural Resources and Tourism and other key stakeholders made the following efforts to ensure recovery of the tourism sector:

- i. Complying with COVID-19 vaccination by vaccinating 350,000 frontline workers in tourism sector;

- ii. Training on how to mitigate COVID-19 to airport workers at Kilimanjaro International Airport, Julius Nyerere International Airport and Zanzibar International Airport;
- iii. Setting up the tourists' specimen collection centers in different tourist attraction areas notably Seronera in Serengeti National Park, and more to be opened at Nyerere National Park;
- iv. Reduction of the license fees for travel agents from US\$ 2000 to US\$ 500 per annum;
- v. Virtual meetings with Ambassadors and travel agents in major tourist markets; and
- vi. Continuing to adhere to health travel standards and procedures.

4.2.5 STRATEGIC INTERVENTIONS FOR SUSTAINABILITY OF TOURISM

The following are some of the strategic interventions adopted by the United Republic of Tanzania for sustainability of tourism sector:

- i. Tourist product development and diversification e.g., golf tourism, health tourism, MICE, beach tourism, cruise ship, city tourism;
- ii. Improvement of tourist infrastructure and auxiliary services such as online visa;
- iii. Enhanced tourism/destination marketing e.g., Digital Marketing, Royal Tour, Dubai Expo;
- iv. Support conservation and community well-being;
- v. Use of modern and appropriate technology in tourism;
- vi. Investment and Stimulus package – business environment such as implementation of blue print;
- vii. Human capital development;
- viii. Research and development of tourism in order to maintain identity of the destination;
- ix. Proper coordination among tourism stakeholders e.g. My Tanzania road show in Germany, Austria and Switzerland;

- x. Crisis management for tourism sector; and
- xi. Improvement of destination connectivity.

4.2.6 PRESENTATIONS FROM THE ZANZIBAR TOURIST BOARD

The Zanzibar Tourist Board informed the Committee that assessment of the performance of tourism sector considers the following key performance indicators:

- i. Tourism expenditure;
- ii. Tourism receipt;
- iii. Available beds and rooms;
- iv. Number of tourist arrivals; and
- v. Average length of stay.

Table 7: Zanzibar Tourism Sector Performance

1	Gross Domestic Product	27%
2	Foreign Exchange Earning	82%
3	Direct Employment	33,000
4	Indirect Employment	60,000 plus
5	International Tourist Arrivals (2019)	538,264
6	International Tourist Arrivals (2020)	260,644 (C-19)

Source: Zanzibar tourist board

Table 8: Monthly Visitor Arrivals 2012-2019

Month	2012	2013	2014	2015	2016	2017	2018	2019
January	18,988	20,905	29,836	23,052	31,717	40,938	52,417	46,133
February	18,354	18,017	39,997	28,918	34,175	39,119	46,935	50,387
March	13,680	15,354	19,703	20,265	29,058	30,366	39,592	33,883
April	7,612	6,880	12,705	13,942	14,701	21,004	21,139	20,242
May	5,859	6,509	12,351	11,501	13,654	15,696	18,655	15,640
June	10,483	11,172	19,806	17,397	20,546	23,458	37,235	36,605
July	14,752	14,514	33,145	28,163	37,553	41,034	53,087	55,947
August	22,470	18,118	39,087	32,726	42,484	51,937	56,861	68,163
September	13,439	14,510	25,582	27,014	32,765	38,977	52,551	49,732
October	15,590	16,510	27,789	25,422	44,169	43,470	49,796	53,023
November	12,889	15,614	23,412	25,914	31,557	36,363	39,713	47,824
December	18,197	23,198	28,478	39,929	43,863	51,112	52,828	60,685
Total	169,223	181,301	311,891	294,243	376,242	433,474	520,809	538,264

Source: Zanzibar Tourist Board

Table 9: Number of Hotels/Guest Houses by Grade (2013-2019)

HOTEL GRADE	2013	2014	2015	2016	2017	2018	2018
Five Stars	26	26	17	17	19	25	25
Four Stars	12	12	9	9	10	17	18
Three Stars	26	26	43	43	43	54	50
Two Stars	18	18	6	6	7	9	14
One Star	61	65	0	47	55	98	108
AA	41	42	121	86	87	62	86
A	194	217	276	244	252	244	307
TOTAL	378	406	472	452	473	509	608

Source: Zanzibar Tourist Board

Table 10: Rooms and Beds (2019)

GRADE	UNIT	ROOMS
FIVE STARS	25	2028
FOUR STARS	18	928
THREE STARS	50	2249
TWO STARS	14	313
ONE STAR	108	1551
AA (UPER GUEST)	86	1236
A (LOWER GUEST)	307	2367
TOTAL	608	10672

Source: Zanzibar Tourist Board

4.2.6.1 TOURISM RECEIPT 2019

Tourism receipt increased by 5.5 percent to USD 535.2 million in 2019 compared with USD 507.5 million in 2018. Large share of earnings was received from visitors who came for leisure and holidays, which is USD 531.8 million accounting for 99.4% of the total earnings.

4.2.6.2 THE EFFECTS OF COVID-19 TO TOURISM IN ZANZIBAR

The following were some of the effects of Covid -19 pandemic to the Tourism Sector in Zanzibar:

- i. Affected almost every sector of the Zanzibar economy;
- ii. Hit hard sectors such as accommodation, aviation, transportation and restaurant;
- iii. Tourist arrivals declined to below 29 per cent;
- iv. Resulted on job loss of around 80,000;
- v. Revenue loss from accommodations, ground-handling fees, landing fees, lighting, levies charged to airlines and tourists visiting the country.

4.2.6.3 MEASURES TAKEN BY THE REVOLUTIONARY GOVERNMENT OF ZANZIBAR

- i. To develop Standard Operational Protocols for all types of tourism businesses;
- ii. To install COVID-19 rapid testing machines at crucial entry points – airport and seaport;
- iii. To open the border and ensure effective control to limit the spread of the virus;
- iv. To encourage short-haul and launch a comprehensive regional and domestic marketing campaign by persuading Africans to travel to Zanzibar; and
- v. Reform on VAT and Hotel Levy.

4.2.7 PRESENTATION FROM THE HOTEL ASSOCIATION ZANZIBAR

The Covid-19 pandemic severely disrupted the lives and economies around the world. Every part of tourism and hospitality value chain was affected by the unprecedented

travel and mobility restrictions (border control, lockdowns, quarantines, curfews, social distancing) undertaken by governments to contain the spread of the virus.

As a consequence, the arrival numbers significantly dropped. For example, from April to June 2020, there were only 400 travelers which is the lowest number ever recorded. The Airport was closed and hotels were closed for at least 2 months. The months of July to September 2020 witnessed only 5% of tourists arrives compared to the same period of 2019, signifying 95% loss. The period from October to December 2020 witnessed 55% of tourists arrived compared to the same period on 2019. The increase was occasioned by the Russian, Ukraine and Polish Charters. For the period from January to March, 2021 there were 92% of the tourists arrived compared to the same period of 2019. However, Zanzibar witnessed another drop from April to July 2021 where only 57% of the tourist arrived compared to the same period of 2019. The drop was an outcome of the end of season for Russian Charters.

4.2.7.1 MAJOR IMPACTS OF COVID 19

- i. Sickness and loss of life created major concern worldwide;
- ii. Travel restrictions led to major cancellation of bookings;
- iii. Containment measures announced by governments led to temporary closure of hotels;
- iv. Inbound tourists and other international arrivals significantly fell;
- v. Hotels suffered lowest demand levels for hospitality services and poor value due to lack of demand;
- vi. Hotels suffered unprecedented losses and many are still struggling;
- vii. Massive cancellations led to lowest occupancies and hence lowest revenues;
- viii. Employees suffered pay cuts, unpaid leaves and in worst cases layoffs;
- ix. Significant drop of tax revenue related to tourism activities;
- x. Lack of tourism development as operators / investors halted plans;

- xi. Suppliers to hospitality businesses suffered major losses and the value chain was all disrupted;
- xii. Anxiety and fear for health, for jobs, for survival; and
- xiii. The pandemic became an economic disaster and development enemy as is a health crisis.

4.2.7.2 KEY RECOVERY STRATEGIES

- i. Hotels established operating standards on Covid-19 and trained their staff to follow and enforce all precautionary measures and protocols to ensure safe and healthy environment;
- ii. Publish Covid-19 statistics and put emphasis on enforcement of Covid-19 protocols throughout Zanzibar;
- iii. Vaccination campaign to protect people and avoid wide spread of new infections;
- iv. Access to vaccination for all tourism staff (as frontline workers) and staff from all related sectors and services;
- v. Government's commitment to enforce Covid-19 protocols and contain the spread of the virus, to support and facilitate tourism, to provide and publish statistics on the situation of Covid-19 in Zanzibar;
- vi. Door-to-door' vaccination campaign in hotels and publishing the information to the public, partners, the travel market and source markets;
- vii. Speed in processing and issuing vaccination certificates and the vaccination cards;
- viii. Formal certification of hotels and institutions that have vaccinated a high percentage of their staff;
- ix. Constant and consistent push from both the public and private sector with all relevant government, partners and stakeholders, to open the corridors with key source markets
- x. Airport Authorities and all entry points to be properly informed and trained in order to carry out all protocols in a consistent and professional way;

- xi. Government to continue to promote business continuity amid the pandemic, to support steady recovery and strong comeback thereafter;
- xii. Managing guest experience to ensure that they leave happy and will return or commend Zanzibar to others;
- xiii. Managing guest feedback and giving response to all bad and negative feedback with actions taken to restore confidence of travelers to Zanzibar; and
- xiv. Train all airport, entry and exit points staff to work professionally and exhibit the true Zanzibari Hospitality.

4.2.7.3 OPENING UP ZANZIBAR – ACTIVITIES OF THE HOTEL ASSOCIATION OF ZANZIBAR

- a. Close liaison and information exchange with embassies and European Union authorities that Zanzibar is practicing safe travel and is ready and open to visitors;
- b. Support initiatives to sell and promote Zanzibar including EAC Tourism Expo Fam trip, Rebrand Tanzania Royal Tour, Swahili Weddings initiative to reintroduce Zanzibar culture and life style as a tourism product. Hotels ready to work with MOT and ZCT by offering free room nights for buyers coming to experience Zanzibar first hand; and
- c. Planned activities for the last half of 2021;
 - Golf Tournament – November 2021, to bring together golfers and enthusiasts from Tanzania and the EAC Region and promote domestic / African tourism
 - Hotel & Tourism Fair – December 2021, to bring together buyers from regional and international markets and showcase Zanzibar to the world ready for the new season in 2022.
 - Zanzibar Now Campaign – series of videos showcasing the unique attributes and attractions of Zanzibar, the health and safety assurances and the readiness to welcome visitors to Zanzibar now.

4.2.7.4 KEY TAKEAWAYS FOR THE GOVERNMENT

- i. Introducing and following consistent and sensible protocols to ensure the safety of people on the islands;
- ii. Providing clear information to travelers through the travel advisories and to businesses, in order to limit uncertainty;
- iii. Restoring confidence in the health situation through publication of statistics, the numbers speak out clearly;
- iv. Supporting tourism businesses that have struggled through this difficult period to help them adapt and survive;
- v. Playing a strong part in promoting the safe return of international tourism and domestic/regional tourism;
- vi. Having a strong sustainable strategy for the development of tourism on the island;
- vii. Building a more resilient and sustainable tourism, and grow the domestic, regional and Middle East / Arab Gulf markets;
- viii. Strengthening relationship and cooperation between countries that are important to the economy of the island and creating new ties;
- ix. Considering the long-term implications: The crisis may have offered an important opportunity to rethink for the future. Governments need to capitalize on the digitalization and promote the structural transformation needed to build a stronger, more sustainable and resilient tourism economy;
- x. Work closer with the private sector and utilize the vast resources available to complement/bridge gaps in the public sector and together deliver the transformative change required in tourism; and
- xi. Tourism Roadmap – utilize the tourism for all proposal to strategize, structure and adopt a sustainable tourism development roadmap that will shape the future of tourism in Zanzibar for decades to come.

4.2.8 VISIT TO STONE TOWN TOURIST SITE

The Committee visited the Stone Town Tourist Site which is located within the city of Zanzibar (Mji Mkongwe). This area is one of the UNESCO World Heritage Sites. This is a wonderful site where one can observe various things during the tour and it is always a walk tour. Some of the things one can see include the narrow streets of Zanzibar, the former slave market, modern hotels in old buildings, Jaws Corner, House of Wonders, the Spice Tour, mix religious buildings, Zanzibar Coffee House and many other things. The Committee visited just few of all the attractions because of time, the nature of the activity and the hot whether condition.

4.2.9 MEETING WITH THE MINISTER FOR TOURISM AND HERITAGE OF ZANZIBAR

On 27th October, 2021, the Committee held interactive meeting with the Minister for Tourism and Heritage of Zanzibar, Hon. Lela Mohamed Mussa. The Minister was accompanied by the Permanent Secretary, Ms. Fatma Mabrouk Khamis. The Minister met with Hon. Dr. Abdullah Hasnuu Makame, the Committee Chairperson, Hon. Fatuma Ibrahim Alli and Hon. Josephine Sebastian Lemoyan.

The minister thanked EALA and the Committee for undertaking this activity in Zanzibar and welcome more activities of the Assembly and Committees in Zanzibar. The Minister specifically invited the Committee to go back to Zanzibar for interaction and to visit Pemba islands. She said that Pemba Island has a lot to offer to the East Africans, therefore she requested EALA to inform people of East Africa to use the various opportunities available in Pemba and Zanzibar in general. Specifically, the Ministers:

1. Explained that the Revolutionary Government of Zanzibar is inviting local and foreign investors to invest in the development and restoration of historical sites especially the structures around Stone Town.
2. Informed the Committee that the government have started working with all stakeholders to address some of the challenges facing the tourism sector in

- Zanzibar including improving the service delivery at the Karume International Airport in order to reduce the time spent by tourist while entering Zanzibar;
3. The government is training police to start tourism police who are going to handle issues relating to tourist in Zanzibar;
 4. They are reviewing all outdated laws governing the tourism sector in order to improve the legal system; and
 5. They are developing other tourist products apart from beaches. One of the areas they are putting more effort is promotion of cultural tourism.

The Committee also received a detailed presentation from the Ministry of Agriculture of the United Republic of Tanzania on the Impact of Covid 19 Pandemic on agriculture. However, the presentation is not included in this report because the concentration of the Committee was on tourism.

4.3 THE REPUBLIC OF BURUNDI

In the Republic of Burundi, the Committee visited the tourist sites around Bujumbura and held interactive meetings with government officials and other related key stakeholders.

4.3.1 TOURISM ATTRACTIONS IN THE REPUBLIC OF BURUNDI

Burundi has about 126 tourist attractions, but only about 20 have high end potential as attractions for tourists visiting the country. The type of attractions mainly are, Drum Exhibitions, Lakes & Rivers, National Parks & Reserves, Historical Sites, Cultural Heritage and Events. The most sought-after sites and events are but not limited to;

- i. Sanctuaire des Tambourinaires de Gishora
- ii. Lac Tanganyika
- iii. Les lacs du Nord
- iv. Les cases de Magumba
- v. Failles des Allemands
- vi. Parc National de la Ruvubu
- vii. Chutes de Karera

- viii. Danse Intore
- ix. Danse Agasimbo
- x. Les Necropoles des Rois
- xi. Reserve Naturelle de la Rusizi
- xii. Parc National de la Kibira
- xiii. Reserves Naturelles de Kigwena
- xiv. Cathedrale de Ngozi
- xv. Reserves de Naturelles de Vyanda
- xvi. Festival National de la Culture
- xvii. Eglise de Mugera
- xviii. Mont Heha
- xix. Cathedrale de Mushasha
- xx. FESTICAB
- xxi. Source du Nil

The committee specifically visited the Rusizi National Park, the Museum, the Exhibition Center and the Unity Monument.

4.3.1.1 RUSIZI NATIONAL PARK (PARC NATIONAL DE LA RUSIZI)

The Park is about 15 Kms from Bujumbura. The river Rusizi dissects the Park into two and flows from the Republic of Rwanda to the Northern tip of Lake Tanganyika. Members of the committee took a boat cruise along the river dotted with Hippos and crocodiles all the way to the Lake Tanganyika. The acacia vegetation and shrubs along the river banks have so many species of birds, a big attraction for bird watchers and ornithologists.

4.3.1.2 MUSEUM AND EXHIBITION CENTER

The committee toured a museum in the heart of Bujumbura. The place is home to a collection of wild life; snakes, crocodiles, antelopes, chimpanzees and birds. Craftsmen make a wide range of artifacts exhibited at the museum grounds. Also shown here is the Cultural Kingly Palace.

4.3.1.3 UNITY MONUMENT (MONUMENT DE L'UNITE)

The Unity Monument was built as a symbol of unity after many years of hostility among the ethnic groups of Burundi. It is imposing on the top of Vugizo hill with an epitaph 'dusenyerere ku mugozi umwe' (we gather onto one rope). The place is a photographic spot with beautiful views of Bujumbura city.

4.3.1.4 DRUMS (CREATE A SUBTITLE FOR DRUMS)

The Drummers of Burundi is a cultural percussion ensemble that drums with skill, expressiveness and excitement. They are such a historical wonder to watch. In 2014, the ritual Burundian drummers were inaugurated on the UNESCO cultural heritage list.

4.3.2 STATE OF TOURISM IN THE REPUBLIC OF BURUNDI

Tourism sector is undergoing development in Burundi. The government instituted a committee in 2011 to make comprehensive research and develop a paper on what needs to be done to develop the industry in the country. It's unfortunate that the security crisis of 2015 interrupted the work, and was later worsened by the Covid Pandemic. Findings therefore have not been shared with government for application.

Like in all other countries, tourism in the Republic of Burundi was disrupted by the Covid 19 Pandemic. The country saw a decline in hotel reservations and few visitors entering Burundi both through the airport and land borders due to travel restrictions.

The private sector expressed their inability to access data. Data is important to guide investment level and business forecast. They attributed the failure to companies not being transparent to data correctors with skepticism that sought was intended for taxation. For example, hotels are not willing to reveal occupancy levels.

The government made a policy geared at giving financial benefits to companies that planned to invest in tourism related businesses. Banks were asked to give financial instruments that would encourage investment in the industry, such as long term-low interest loans. This however has not been forthcoming from financial institutions. The following are some the recommendations from the stakeholders in Burundi:

- i. There is a need for the government in collaboration with the private sector to develop tourism infrastructure in Burundi;
- ii. The private sector requested that the government should ensure that Lake Tanganyika shoreline and beaches masterplan is implemented;
- iii. The East African Community led classification of hotels in Burundi was partially done and left a lot to be desired.

The Republic of Burundi instituted adherence to Covid Protocols at the Airport and within the country. This was meant to ensure good health, safety of Burundians and the people visiting the country as per the WHO standards.

4.3.3 RECOMMENDATIONS

- i. There is need for the Republic of Burundi to benchmark from other countries within the region that have done better in the tourism industry;
- ii. Burundi should build a school dedicated to imparting subjects that enhance the hospitality industry. Majority of the trained personnel the country has are mainly trained from the Republic of Kenya. Many more would access the training if these courses were offered at home.

4.4 REPUBLIC OF SOUTH SUDAN

4.4.1 GENERAL OVERVIEW

The Republic of South Sudan is a vast country, approximately 648,000 Km² which is ecologically rich and diverse wildlife resources. The country has hot humid climate annual temperature of 30⁰C and two distinct seasons – the rainy season from April to October and the dry season from November to March.

The Republic of South Sudan has six National Parks and twelve Game Reserves. They vary in size and ecology with the opportunities of wildlife, rich biodiversity, natural aspects, cultural and historical heritage.

4.4.2 TOURIST ATTRACTIONS AND POTENTIALS AVAILABLE

National Parks are estimated to cover an area of 51,760 Km². The National Parks include Nimule National Park, Badingilo National Park, Boma National Park, Shambe National Park, Lantoto National Park and Southern National Park.

Game Reserves covers 34,110 Km², namely Kidepo Game Reserve, Numatina Game Reserve, Chelkou Game Reserve, Boro Game Reserve, Meshra Game Reserve, Ashana Game Reserve, Zeraf Game Reserve, Fanyikang Game Reserve, Mbarizunga Game Reserve, Birekapatuos Game Reserve, Juba Game Reserve and Bangangai Game Reserve. The total area covered for National Park and Game Reserve is about 13% of the total land surface of the whole country.

Wildlife Migrations is a major tourist attraction for the Republic of South Sudan across the eastern grassland savannahs and floodplains of Jonglei and Eastern Equatoria States that stretch into the neighbouring Gambela region of Ethiopia. Is considered to be the world's second largest animal migration and is a good place for ecotourism. The white-eared kob, tiang, Mongalla gazelle and Bohor reedbuck form one of the greatest animal migrations and wildlife spectacles of the world. This is an important natural resource for South Sudan and the rest of the world.

Although the Republic of South Sudan shares many of its fauna species with her neighbouring countries to the south and west, other species like the Nile lechwe and the white-eared kob are endemic to South Sudan. It has the world's population stronghold of the shoebill and black-crowned crane which occur in the Sudd wetlands.

4.4.3 VISITING NATIONAL PARKS

The Committee conducted a flying tour through the Boma and Badingilo National Parks. Throughout the tour, national parks were experiencing floods since it was a rainy season. During this season all animal migrates to the higher lands where there are no floods and can access pasture.

The Boma National Park covers 20,000 Km² which is enriched with white eared kob and Badingilo National Park covers 8,935 Km² which is popular known for black rhino.

The Republic of South Sudan have diverse attractive cultural dances and cultural food, among others cultural dance including Acholii dance, Shilluk dance and Azande dance. Cultural foods are Kisra, Akob and Asida.



EALA Members with General Khamis boarding an Airplane flying to Boma and Badingilo National Parks.



The pictures above shows a national park is flooded during the rainy season

4.4.4 CONTRIBUTION OF TOURISM SECTOR TO THE ECONOMY

Wildlife resource represents one of the major opportunities for development and diversification of the economy while putting in place measures for sustainable management of this natural and cultural heritage.

The Ministry of Wildlife Conservation and Tourism (MWCT) vision is to have a vibrant and sustainably managed wildlife resources contributing to conservation and economic development, and to make the Republic of South Sudan one of the best tourist destinations in the world. The Mission of the MWCT is to effectively conserve and manage the wildlife resources in South Sudan and develop a wildlife-based tourism and other attractions to international standards.

4.4.5 THE EFFECT OF COVID 19 PANDEMIC ON TOURISM AND RELATED SECTORS

In general, it was noted that tourism in the Republic of South Sudan was mainly affected by the insecurity and political turmoil. Because of long conflict and war tourism activities collapsed even before the outbreak of the COVID 19. With this regard COVID 19 is considered not to have impact to the tourism sector in the South Sudan as much as the insecurity.

Therefore, the Committee noted that, the Republic of South Sudan tourism sector was mostly affected with the following challenges:

- i. Habitat Destruction and Degradation: This is one of the main causes of biodiversity loss within most of the protected areas in South;
- ii. Existence of illegal firearms and men in uniform in and around protected areas: The presence of these armed groups in and around the protected areas has badly affected the areas in term of poaching and habitat destruction. Very significant number of citizens across the country has firearms, illegally acquired;
- iii. Inadequate legislations;

- iv. Poor management of the protected areas;
- v. Lack of field equipment, armament and uniform for officers;
- vi. Poor transport and communication between the National Parks and Game Reserves and the Capital in Juba;
- vii. Shortage of competent and professionally skilled personnel;
- viii. Inadequate of tourist infrastructure in many areas of tourist attraction sites;
- ix. Insecurity within the country;
- x. Lack of advocacy on wildlife and tourism products at local, regional and international to steer up tourism in the country;
- xi. Negative advisory on travel to the Republic of South Sudan; and
- xii. The outbreak of COVID 19 pandemic.

4.4.6 RECOMMENDATIONS

As a remedy for the above challenges, the following are the strategic policy framework and recommendations to the Ministry of Wildlife Conservation and Tourism Transformation of the Republic of South Sudan.

- i. Improvement of policy and legal framework to guide the sector development;
- ii. Development of the tourism and wildlife structure;
- iii. Review the agreements signed with partners NGOs such as Wildlife Conservation Society (WSC), Flora and Fauna International (IFF) and International Union Conservation of Nature (IUCN);
- iv. Recruitment and training of relevant personnel and experts who will revamp the sector;

- v. Development of protected areas including the wetlands and the historical sites:
- vi. Improvement of research and planning activities;
- vii. To improve the law enforcement activities by empowering the law enforcement agencies to protect national parks, game reserves and other tourist attractions;
- viii. Increase education and awareness programs to the community including schools and other interested stakeholders;
- ix. Review and process the accession to multilateral and regional wildlife agreements;
- x. Develop bilateral and transboundary agreements with neighbouring countries;
- xi. Design and develop strategy for the promotion of tourism products locally, regionally and internationally;
- xii. Review and unify tourism administration and management system at all levels in the Country;
- xiii. Identify and maintain historical and heritage sites as tourist attraction in collaboration with other stakeholders;
- xiv. Complete the classification and standardization of all hotels, tour and travel agencies in the country;
- xv. Establishment of an air-wing for wildlife by developing airstrips and provision of aircraft choppers and drones; and
- xvi. Create and follow COVID 19 regulations measures and to sensitize tourism officers on the preventive measures.

4.5 REPUBLIC OF UGANDA

In the Republic of Uganda, the Committee interacted with various stakeholders from both public and private sector and visited the Queen Elizabeth National Park including the Kyambura Gorge. The following are the stakeholders who engaged with the Committee:

- i. Ministry of Tourism, Wildlife and Antiques;
- ii. Ministry of EAC Affairs;
- iii. Uganda Tourism Board;
- iv. Uganda Tourism Association;
- v. Ministry of Foreign Affairs;
- vi. Ministry of Water and Environment;
- vii. Directorate of Citizenship and Immigration;
- viii. Association of Ugandan Women in Tourism trade;
- ix. Uganda Hotel Owners Association;
- x. Uganda Safari Guides Association;
- xi. Association of Uganda Tour Operators;
- xii. Uganda Association of Travel Agents;
- xiii. National Arts and Cultural Crafts Association of Uganda;
- xiv. Uganda Community Tourism Association; and
- xv. Hotel General Managers Association of Uganda.

The Uganda Tour Operators assisted the Committee by providing a motor vehicle which the Committee used to travel from Kampala to the Queen Elizabeth National Park. The Committee appreciates the collaboration received.

4.5.1 THE TOURISM SECTOR IN UGANDA

The Uganda Tourism Sector is one of the major economic drivers leading in the transformation of the country by contributing over 9.7% of GDP before the pandemic as well as the leading foreign exchange of about US\$ 1.6 billion. The sector in Uganda is guided by key policy documents which are:

- i. The Tourism Master Plan 2014-2024;
- ii. The Tourism Policy 2015;
- iii. Sector Development Plan 2020-2025;
- iv. National Development Plan 2040; and
- v. The Sector Strategic Plan 2021-2025.

It is important to note that apart from the infrastructure, the government of Uganda has no direct investment in tourism which makes the private sector the leading investor in tourism. The government provide policies and makes laws regulating tourism for example tax incentives to the investors and private sector. Private sector has set up training facilities for training personnel and experts for the tourism and related sectors.

4.5.2 TOURIST ATTRACTIONS IN UGANDA

Uganda is globally known as the Pearl of Africa because of its natural endowments and beauty. It boasts of its 10 national parks, 12 wildlife reserves, 10 wildlife sanctuaries, five community wildlife management areas and 506 central forest reserves each with unique endowments.

Uganda is the source of the world's longest river, the Nile as well as the second deepest lake in Africa, Lake Bunyonyi and five of East Africa's great lakes that is; Lake Victoria, Lake Kyoga, Lake George, Lake Albert and Lake Edward. Twenty percent of Uganda is covered by water characterized by some of the best waterfalls in the world including Murchison, Karuma, Sipi, Kalagala, Sezibwa, Itanda and Kisizi falls. Also, Uganda harbors 12 wetlands of international importance designated under the Ramsar Convention including the Mabamba Swamp as well as hundreds of rivers located across the country and over 100 crater lakes dotted in extinct volcanic sites.

Uganda boasts as the world's premier primate country with the largest mountain gorilla population in the world of about 53% and over 5000 chimpanzees. Likewise, it is a home to world's largest number of monkeys, baboons, apes, rare colobus, nocturnal bush babies and pottos found in pristine eco-environment. It has more than 1,083 bird

species, hence it was voted Africa's number one birding site in 2012 by the African bird club which enables it to host the Africa birding expo every November with Bwindi Impenetrable National Park as the most popular birding spot.

On the other side Uganda is the fourth most culturally diverse country in the world endowed with 64 ethnic groups and languages, each with a distinct cultural heritage, history, language, food, dance, dressing, customs and beliefs. There is also faith-based pilgrim attractions like the Bahai temple which is the only one of its kind in Africa and home of the 45 Uganda martyrs' who willingly died for their faith as well as the Gaddafi mosque which is the second largest mosque in Africa.

There are a number of monuments, museums and antiquities across the country for example the Fort Patiko, Fort Lugard, the independence monument, Nyero Rock arts, Barlonyo memorial sites as well as regional museums in Soroti, Mugaba and Moroto. Uganda is also known as the East African weekend capital of night life with a variety of entertainment facilities like discotheques and cultural performances abound in Kampala which have greatly contributed to the growth of the tourism sector.

The committee noted that the hospitality industry has grown with over 4,000 great accommodation facilities and vacation hotels, lodges and motels.

4.5.3 THE ROLE OF PRIVATE SECTOR IN THE DEVELOPMENT OF TOURISM

The private sector in Uganda is organized along the various subsectors in the value chain, these include the tour operations, hotels, restaurants and guest houses, tourism communities, guiding services, travel agencies, professional, conservationists and transport. The various subsectors are reorganized under the Uganda Tourism Association (UTA) which is the apex body for the Tourism Private Sector in Uganda.

The private sector leads the investment in the tourism sector through hospitality subsector of hotels and serviced apartments, transport services for tourists, technological innovations and cultural experiences.

4.5.4 IMPACT OF COVID-19 ON THE TOURISM INDUSTRY

Uganda planned to receive four million arrivals in 2020. Before the pandemic it had already received 1.5 million tourists. Before the onset of covid-19, tourism was the leading foreign exchange earner, bringing US\$1.6 billion and contributing 8% to GDP with over 500,000 jobs. Furthermore, Uganda had been ranked the sixth most popular destination in Africa for hosting international conferences and events, which were all reversed by covid-19 presenting the tourism sector as the most negatively affected since travel was put on halt. As a result, the industry registered a massive loss characterized by private business shutdown, tourist bookings cancellations and closure of businesses.

The Committee noted that at least 70% of jobs had been lost by June 2020 with 91% of the tourism entities downsizing their workforce. This reduced the contribution of the sector to employment from 5.8% in 2019 to only 2.4% in 2020. The sector also suffered losses of almost 4.4 trillion UGX as a result of covid-19 because of the restrictions to international mobility.

There was a decline of 31.8% in hotel occupancy from 51.9% in 2019 to 20.1% in 2020. Some hotel reported to have not received any guest for more than a year. This also resulted into the loss of jobs as most accommodation facilities only retained a few staff and consequently resulted into loss of demand for agricultural produce and supplies from local manufacturers. On the other hand, Uganda registered booking cancellation in over 90% of the hotel facilities, which led to a loss of revenue amounting to US\$ 320.8 million (UGX 1.19 trillion) in addition to other business losses.

At least 85% of booked meetings, events and conferences in 2020 were cancelled. Some of the key conferences that were cancelled include the UN G77 Summit that was scheduled to take place in April, with participants from 136 countries, the World Health Summit and the Africa Climate Week.

The Committee was also informed that 9 in every 10 Tour Operators registered booking cancellation between march and June 2020, resulting into loss of tourism revenue in excess of US\$ 30.4 million (UGX 0.11 trillion) in just four months. The tourism sites also registered a 78% decline in tourism volumes which was a big blow to the sector.

4.5.5 TOURISTS ARRIVALS IN THE FIRST HALF OF 2021

The first half of the year 2021 witnessed some increase of tourists' activities in Uganda. The visit to the National Parks increased by 4.1% in the first six months of 2021 compared to the previous year. The international tourists increased by 52.5% in April to June compared to January to March but declined by 53.2% at half year in 2021 compared to the first six months of 2020.

The National Park visits by Ugandans doubled in the first six months of 2021 compared to the same period of the year 2020 that is from 22,471 tourists to 45,223 tourists. Visit to the source of the Nile also increased by 49% in the first six months of 2021 as compared to the same period in 2020. Visit to the Entebbe Zoo doubled in the first six months of 2021 compared to the same period of 2020 that is from 34,758 tourists to 60,295 tourists.

A study conducted in April 2021 showed that the overall tourist bookings tripled by the first quarter of 2021 increasing from 27,542 bookings by end of August 2020 to 83,464 bookings by end of March 2021. Bookings registered by airlines and accommodation facilities doubled by end of March 2021 while bookings recorded by tour operators increased eleven-fold between August 2020 and march 2021.

The committee was also informed that at least 30% of jobs were recovered by end of March 2021. Hotel occupancy rates in Uganda increased by 10% by end of March 2021 to an average of 31% down from 20.1% at the end of the 2020.

Weekly flights within or to and out of Uganda had increased fourfold by end of March 2021 rising from a weekly average of three flights in 2020 to a weekly average of 11 flights in 2021. This means that 73% of the flights that fly Ugandan routes have resumed.

4.5.6 IMPLEMENTATION OF THE EAC TOURISM RECOVERY PLAN

The committee was informed that the government developed a covid 19 Business recovery Plan to guide sector interventions during the pandemic and recovery period. A National Covid-19 taskforce was created with active representation of tourism stakeholders. Working with the Ministry of Health, the government developed and disseminated tourism sector standard operating procedures to guide the re-opening of the tourism businesses:

- i. Upcountry accommodation facilities and Kampala based hotels were exempted from VAT up to 30th June 2021;
- ii. Uganda Development Bank was capitalized by the Government to extend low interest credit to business enterprises;
- iii. Government intensified promotional campaigns aimed at attracting tourists from both domestic and international markets through tourism drives like “Take on the Pearl” and Pearl of Africa Virtual Expo all aimed at attracting tourists to various destinations in Uganda;
- iv. The Uganda Tourism Board engaged Market Destination Representatives in key source markets to keep destination Uganda afloat in the source markets of North America, UK, Germany, China, Japan and Gulf States;
- v. Government effectively responded to Covid-19 and as a result, case fatalities and transmission rates were kept in control;

- vi. World Tourism Day 2021 was celebrated mainly virtual with a total reach of up to 100,000 Ugandans on the importance of tourism.
- vii. Tourism sites of Kagulu Hills, Bishop Hannington and Kayabwe Equator have been earmarked for development to improve competitiveness.
- viii. Kitagata hot springs are going to be developed to include pools, parking and resting sheds.
- ix. Two cultural heritage sites have been identified for further development including Mugaba Palace in Mbarara and Nyero Art site in Kumi.
- x. Three species were re-introduced in protected areas. 15 Giraffes trans located to Pian Upe game reserve and 200 Uganda kobs moved to Kidepo Valley National Park.
- xi. The Government cleared up to 3000 hectares of invasive and exotic species in protected areas. Degraded area restoration plans were developed and implemented with restoration of 640 hectares in all protected areas.
- xii. Eight camping sites are to be developed in Queen Elizabeth National Park, Murchison Falls National Park, Rwenzori Mountains National Park, Lake Mburo National Park, Mountain Elgon National Park and Mgahinga Gorilla National Park.
- xiii. Enforcement and compliance to tourism standards, SoPs, and regulations were strengthened through registering, inspecting and licensing tourism service providers that is 500 tour and travel guides, 500 agents and operators and 3000 accommodation facilities.
- xiv. Uganda Wildlife Research and Training Institute infrastructure were developed including class rooms, laboratories, administration block, fence, staff housing and guest house.
- xv. Renovations at the Uganda Wildlife Education Centre focusing on the National Wildlife Quarantine Centre to provide for extension of animal food store with a cold room.
- xvi. Government also commissioned periodic studies to determine the impact of covid-19 on the tourism sector.

- xvii. Government sensitized over 500 tour and travel operators on minimum standards, product packaging and costing and product knowledge.
- xviii. Government conducted digital sensitization for 300 hotel managers on grading and classification.
- xix. Promoted local destinations through digital platforms to spur local, regional and international demand for Ugandan tourism products.
- xx. Uganda participated in virtual tourism expos that included USTOA 2020, JATA and WTM Africa.
- xxi. The committee was also informed that Uganda’s tourism brand development is in its final stages and all marketing activations will be based on this new brand identity.
- xxii. Uganda has coordinated with Partner States in the implementation of signature tourism events like POATE, Kili Fair and magical Kenya tourism expo.
- xxiii. There are ongoing discussions between Uganda wildlife Authority and Kenya Wildlife Services to collectively market parks that are along the border of Uganda and Kenya.
- xxiv. Uganda periodically benchmarks quality standards from other countries especially Kenya and Tanzania in a bid to improve quality standards of its own tourism industry.

It was reported that there were stringent conditions set for people applying for the Recovery Plan assistance. Stakeholders also complained that the Recovery Plan was favoring rich operators as compared to the small-scale operators. They recommended for the review of the Recovery Plan.

4.5.7 A VISIT TO THE KYAMBURA GORGE IN QUEEN ELIZABETH NATIONAL PARK.

The committee visited the Kyambura Gorge which is within the Queen Elizabeth National Park. The visit was prompted by the concerns raised by private sector who are concerned with the negative impact to the Gorge following the decision to relocate the

animals found in the Gorge to pave way for the construction of a dam for power generation within the Gorge.

The Kyambura Gorge is 100 metres deep and 16 Km long characterized by waterfalls and different wildlife like the chimpanzees and other primates like monkeys. The Gorge pours its water in the Kazinga Channel. During the dry season the Gorge is the only source of water for most of the animals within the Queen Elizabeth National Park as the rest of area is totally dry.

Unfortunately, there are plans by investors to construct an electricity generation dam to produce 6.7 Kilo Watts and have all the animals relocated. This will cause the animals to not only lose their home, but also lose the only source of water during the dry season within the National Park. With the existence of chimpanzees, there is massive chimpanzees tracking which would also come to an end once the animals are relocated and cause a decline in the tourism activities at the Gorge.

4.5.8 CHALLENGES REPORTED BY STAKEHOLDERS IN UGANDA

- i. Non-tariff barriers that hinder inter-state movement for example border closures;
- ii. Increased cost of travel domestically and regionally due to increased fees like Covid-19 tests;
- iii. Limited funds for the sector due to low budget portions from the National Budgets;
- iv. Noise pollution commonly known as ebizindalo in some tourist sites forcing the tourists to re-locate to other sites;
- v. Lack of proper access to the tourism sites due to the poor transport infrastructure like roads as well as having one airport yet some tourist attractions are very far;

- vi. Bureaucracies within the government bodies which led to the failure of Uganda Wildlife Authority to accord licenses to individuals who had wanted to import new animal species;
- vii. Costly marketing yet the tourism budget is very low;
- viii. Poor standards of facilities and services that has greatly affected the sector;
- ix. Limited research in the sector to support decision making;
- x. The creative and performing arts are largely undermined and considered as leisure in a manner that negates their importance;
- xi. Exorbitant ground rent of about UGX 40 million quarterly for the National Theatre facility;
- xii. The mandatory testing on arrival at Entebbe International airport has greatly discouraged tourists from visiting Uganda.
- xiii. The on-line visa application has not been smooth since Uganda is still lacking in the technological era which is greatly hurting the sector.

4.5.9 RECOMMENDATIONS

- i. Engage the Committee of Tourism of the Parliament of Uganda to solicit for the stimulus package from the European Union for the sector;
- ii. Engage with the Ministry of Finance to increase the sector's budget;
- iii. Kayabwe equator line should be developed;
- iv. Capacity building should also target tour guides in addition to tour operators and hotel owners;
- v. The Government of Uganda should develop a market strategy for Uganda's products with the help of Embassies through global adverts;
- vi. The Government should consider building airports within the country to enable tourist traverse the sites;
- vii. The government should adopt non-traditional marketing strategies with the help of digital marketing through social media;
- viii. The EAC should come up with standardized Covid test fees;

- ix. The EAC should encourage Partner States to diversify their products to appeal to the local and foreign markets;
- x. A comprehensive review of the tax regimes across the EAC should be carried out;
- xi. The government should encourage Ugandan based research and not donor-based research in order to tackle the problems affecting Uganda;
- xii. The government should provide incentives for the women to enable them grow as most of them lack property for collateral to acquire loans;
- xiii. The Government should be specific and direct in granting the stimulus packages to the entire value chain as required by the Covid Recovery Plan;
- xiv. The government should make online expos accessible and affordable to all stakeholders;
- xv. The government should put stringent measures in place to protect the facilities for example the Kyambura Gorge from which chimpanzees are going to be re-located for a dam to be constructed; and
- xvi. The government should find ways of making airlines refund the tour and travel agencies the funds they collected from the tickets issued before the pandemic in order to minimize losses.

4.6 REPUBLIC OF RWANDA

4.6.1 GENERAL OVERVIEW

Rwanda is commonly referred to the “Land of a Thousand Hills”. The Country is endowed with the scenically stunning Virunga Volcanoes and visited a beautiful landscape and Gorillas on the northwestern part of Rwanda. Among others are also the following features. The Virunga Mountain ranges which consist of 5 major volcanoes including mountain Karisimbi (4507m), Bisoka, Sabyinyo, Gashunga and Muhabura. There are also natural parks including Volcanoes, Nyungwe, Akagera and Gishwati Mukura. Other tourist attractions are:

- i. Lake Kivu;

- ii. Cultural tourism;
- iii. Religious tourisms;
- iv. Eco tourism;
- v. Sports tourism; and
- vi. Meeting, Incentives, Conference, Exhibition (MICE).

The following are some of the activities that take place in the above tourist areas:

- i. Hiking and trekking;
- ii. Sightseeing of the beautiful land scape and Gorillas;
- iii. Wild safaris thus viewing of the big five, Antelopes and buffalos;
- iv. Camping;
- v. Swimming;
- vi. Canoeing;
- vii. Kayaking;
- viii. Beach walking; and
- ix. The Kigali Peace Marathon.

4.6.2 THE ROLE OF RWANDA DEVELOPMENT BOARD IN THE TOURISM SECTOR

The Rwanda Development Board (RDB) is a government institution mandated to accelerate Rwanda economic development by creating an enabling business environment for investment promotion, private growth and tourism. Other core functions are to promote trade and investment, promotion of tourism and marketing, registration of business and companies, provide research and information on tourism, hotel standardization and inspection, promote conservation and export promotion.

The Covid 19 pandemic has caused unparalleled shock to the tourism economy, severely impacting on peoples' livelihoods, neighbors, jobs, and businesses. As the pandemic continue to evolve, the government of Rwanda has responded by creating opportunities to leading sub-sectors in tourism industry and focusing on domestic

tourism by lowering hotel and trekking prices even as it seeks to attract international tourists.

4.6.3 PERFORMANCE OF THE TOURSIM SECTOR

Tourism has been the leading foreign exchange earner for the country in recent years, aided by increase in flights by major airlines to Rwanda. According to the Rwanda Development Board and the National Bank of Rwanda, tourism earnings were estimated at \$ 438 Million in 2017 compared \$ 390 Million in 2016 and \$ 368 in 2015 this showed growth of 25% annual rate during 2013-2018 while the country experienced its highest annual growth in tourism revenue in 2019 with over 1.63 million visitors and \$498m earnings.

By March 2019, tourism contributed 10% of country GDP and was responsible for 8% of employment. So much has changed since 2020, as countries went into lockdowns and international flights grounded so as to contain the spread of the deadly coronavirus, the tourism sector became the hardest hit sectors worldwide.

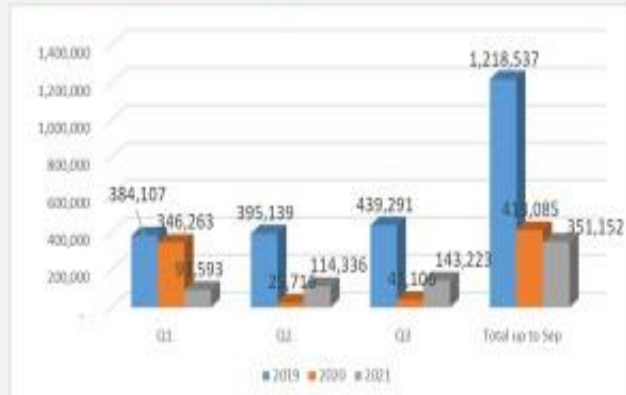
Figure 1: Tourism Performance in Rwanda

Tourism Performance: Revenues and arrivals for 2019 - 2021 and revenues forecast up to 2024

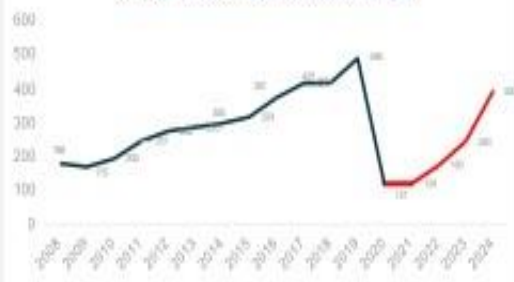
Tourism revenues in million USD by quarter



Total Arrivals up to September



Tourism revenues in million USD



In 2021, USD 93 million were generated from tourism industry from January to September from more than 351,000 visitors which represented a recovery at 26% and 29% in terms of revenues and visitors respectively.

Source: Rwanda Development Board

4.6.4 IMPACT OF COVID 19 TO TOURISM

- i. Decreased number of visitors visiting national park especially the gorilla trekking;
- ii. Unemployment;
- iii. Supply chain disruption due to travel restrictions;
- iv. Decrease of income for hotel and hospitality industry due to cancellation of conference and meeting; and
- v. Decrease of airline income.

4.6.5 INTERVENTIONS TO TOURISM SECTOR

- i. Re-opening for domestic tourist and chartered international flights on 17th June 2020 while from August international visitors arriving on commercial flights were allowed;
- ii. Vaccination rollout across the country which now at 40% of the population;
- iii. Utilization of ICT in Covid 19 test and vaccination;
- iv. Utilization of virtual and hybrid conferences, meetings and events e.g kwita izina;
- v. Enhance safety measures;
- vi. Reduce national park fees e.g., gorilla trekking from \$1500 to \$200 (\$200 for EAC and Rwanda nationals, and \$500 for foreigners living in Rwanda);
- vii. Offering incentives and special offers to tourism and travel stakeholders;
- viii. Lifting travel restrictions and working time with business to access liquidity support;
- ix. Restoring travel confidence through domestic tourism campaigns by information apps for visitors; and
- x. Preparing comprehensive tourisms recovery plan.

4.6.6 TOURISM RECOVERY STRATEGIES

4.6.6.1 ECONOMIC RECOVERY FUND

The Economic Recovery Fund (ERF) was established by the Government of Rwanda to support the recovery of businesses severely hit by COVID19 so that they can survive, resume operations and safeguard employment, thereby cushioning the economic effects of the pandemic coordinated by the National Bank of Rwanda (NBR) of which the tourism sector was a beneficiary.

- i. Allocation of Available Financing as at End May 2020
- ii. Hotel Refinancing = 50Bn RWF
- iii. Working Capital Large Corporate = 30Bn RWF
- iv. Working Capital SMEs = 15Bn RWF

- v. SME Guarantee Scheme = 3Bn RWF
- vi. Working Capital Micro businesses (SACCOs) = 2Bn RWF
- vii. Working Capital Micro businesses (MFIs) = 1Bn RWF

4.6.6.1.1 HOTEL REFINANCING WINDOW

FRW 50 billion was to support the hotel sector which cover about 49.5% of allocated funds. Approved hotels (by NBR) were 149 hotels for a total amount of FRW 42.884 billion. 139 hotels loans worth FRW 42.719 billion have been disbursed, which is 99.6% of the approved loans by the National Bank of Rwanda. Government of Rwanda prioritized tourism as they were mostly affected by Covid-19 and apply only 5% interest rate. The terms of payment offered 1-year grace period also for them to settle and recover.

In line with government support for the sector, taxes on pay as you-earn, income tax deducted from employees' salaries and wages where extended.

4.6.6.1.3 MICE

Through 'Meet in Rwanda Brand', this will involve marketing Rwanda as are preferred MICE destination due to its excellent hub for meetings and events with world class facilities and also simplifying visa process that allows national of every country in the world get visa on arrival.

4.6.6.1.4 PARTNERSHIPS

Rwanda signed strategic partnership with world's biggest brand such as Arsenal FC in London, Paris St German FC and Alibaba .com to market Rwanda through "visit Rwanda Brand"

4.6.6.2 DOMESTIC TOURISM

This is marketing through initiative '*tembea Rwanda*' by motivating government agencies to promote tourism by given attractive packages in the National Parks Gorilla Trekking by reduction of fees from \$1500 to \$200 for Rwandan and all Africans.

4.6.7 VISIT TO RULINDO DISTRICT AND MUSANZE CITY

The Committee commenced its tour from Rulindo district, Ikirenga Cultural Heritage Center located 25 Km from Kigali. The center is built on a historical site that showcases exploits of King Ruganzu II Ndoli, one of Rwanda's most famous kings who reigned in the 16th Century. Ikirenga means the footprint of the king.

The Committee further proceeded to Musanze City located to northwest part of Rwanda. It's largely mountainous where the famous Volcanoes National Park is found. The city is endowed with ancient Musanze Caves stretching up to 2 Km long that are part of tourism attractions within the cities including gorilla trekking safaris.

The Committee finally visited Volcanoes National Park to learn and assess the impact of covid 19 on biodiversity conservation and tourism development activities. The communities living around the protected areas have since 2005 benefited from Integrated Development Project (IDP) model funded from Revenue Sharing Programme (RSP) of 10% generated from tourism revenues, these community projects are Gorillas Research Center, Health Centers, Clean Water, Milk, Electricity, Employment opportunities to the local schools and housing scheme that is comprising 6 blocks flats and a home to 144 families of 680 population. full furnished 3 bedroom with modern equipment, TV, cooker, supplement for 3 months.

The Committee also visited "*Kwita Izina*" centre which is a modelled off a century in which Rwandans name their children in the presence of family and friends. In 2005 Rwanda began official naming of gorillas that has become a global celebration of nature.

The ceremony is an opportunity to thank the communities that live around the volcanoes national park, researchers, partners, vets and the dedicated conservations, rangers and trackers who protect gorillas. The "*Kwita Izina*" sanctuary, a renowned

center for baby naming performs a key role in sensitization to conserve the endangered mountain gorillas.

The Committee wound the activity by visiting the gorilla guardian village and interacted with the reformed poachers which is a traditional cultural center that showcases Rwandan culture, traditions, music and dances.

4.6.8 CHALLENGES

The hotel and the hospitality industry is facing difficulties in repayment of bank loans due to loss of business and accrued interests;

- i. Loss of jobs and the risk to lose many industry professionals in the future;
- ii. Travelling within the EAC region and Africa at large have been quite expensive and has further been exacerbated by the Covid-19 pandemic;
- iii. The community projects funded by revenue sharing program which have been benefiting Small, Medium and Micro enterprises (SMMEs) have reduced due to pandemic;
- iv. Reduced number of international tourists and revenues accruing from tourism;
- v. Limited human resource skills in hotel and hospitality industry.

4.6.9 OBSERVATIONS

The Committee observed the following: -

- i. Unharmonized travel and health guidelines and protocols within the EAC region including mutual recognition of covid tests and vaccination;
- ii. Cancellation of international conferences, meetings and conventions such as Commonwealth Head of Government Meeting (CHOGHM) that had been scheduled for June 2020, heavily impacted on businesses and particularly hospitality and transport industry;
- iii. There is limited information of the existence of the EAC Tourism Recovery plan 2021-2023;

- iv. The Republic of Rwanda has created 100 billion (RWF) Economic Recovery Fund (ERF) to support the recovery of businesses including tourism and hospitality sector;
- v. There exists a good working relationship between Rwanda Development Board and all the tourism stakeholders.

5.0 GENERAL OBSERVATIONS

- i. The tourism sector in all of the EAC Partner States was highly affected by the Covid 19 Pandemic, consequently slowed down the economic development of the Community;
- ii. The development of the EAC Regional COVID -19 Tourism Recovery Plan was a positive action taken by the Council of Ministers, however, its implementation was uncoordinated within and among the Partner States;
- iii. Many stakeholders were unaware of the Regional Recovery Plan adopted by the EAC;
- iv. The unharmonized travel and health guidelines and protocols on Covid within the EAC highly affected the cross-border travel and tourism;
- v. Incentives for the recovery plan in some Partner States excluded medium and small-scale actors who plays a big role in the recovery of the sector;
- vi. The unharmonized covid testing fees and mandatory quarantine highly affected the tourism sector in the region; and
- vii. The refurbishing of the tourist infrastructure that were highly affected due to closure of businesses during the Covid Pandemic would need huge amount of capital.

6.0 GENERAL RECOMMENDATIONS

The Committee makes the following recommendations:

- 1. To urge the Council to direct the Secretariat to coordinate the implementation of the EAC Regional Recovery Plan adopted by the relevant Sectoral Council;**
- 2. To urge the Council to harmonize the travel and health guidelines and protocols to guide the Community during pandemics like the Covid 19;**
- 3. To urge the Council to direct Partner States to support the sector recovery programs by financing the refurbishment of the tourist infrastructure affected by the closure of the business due to the Pandemic;**
- 4. To urge the Council to harmonize the Covid 19 testing fees among the Partner States;**
- 5. To urge the Council to direct Partner States to prioritize small and medium scale actors the recovery programs taking place in the EAC;**
- 6. To urge the Council to facilitate the implementation of the EAC Single Tourist Visa in all Partner States for the purpose of promoting tourism in the EAC;**
- 7. Urge the Council to direct Partner States to review their labour laws for the purpose of safeguarding the rights and interests of employees especially during the outbreak of pandemics;**
- 8. Urge the Council to direct the EAC Secretariat to initiate a review of the EAC Regional COVID-19 Tourism Recovery Plan to address the concerns observed in the implementation of the Plan;**
- 9. Urge the Council to direct Partner States to develop domestic and regional tourism which can be sustainable during the outbreak of pandemics; and**
- 10. Urge the Council to encourage Partner States to diversify their tourism products to appeal to the local and foreign markets.**