

REGIONAL TOURISM DEVELOPMENT A REVIEW OF CHALLENGES & TRENDS IN EAST AFRICA

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ABSTRACT

Tourism as an emerging industry is an important economic sector for Africa. The WTTC research found that tourism in Africa was mainly (71%) leisure-driven, with the remainder (29%) being business-driven. According to the United Nations World Tourism Organization, Africa received 71.2 million international arrivals in 2019 amounting to about US\$ 40 billion in revenue. Domestic tourism contributed 56% with international tourism contributing 44% to Africa's tourism industry. Pre-Covid, demand in tourism products had significantly increased and both private and public sectors channeled their resources into the industry. However, the tourism industry has been heavily impacted by the pandemic as people's economic lives are halted and their freedom of movement curtailed. Chiefly among these impacts on African economies is the reduction in foreign income especially in countries dependent heavily on international tourism. Therefore, the view of promoting a strong regional tourism is necessary. Some of the reasons why African countries have remained closed to each other overall are largely due to fear of loss of jobs, security, trust and other legal requirements. In East Africa, the tourism sector lost more than \$4.8 billion and 2 million jobs in 2020 due to COVID-19. The tourism sector contributes about 10% to East Africa Community (EAC) partner states' gross domestic product (GDP). Results show that the East Africa's tourism sector has persevered largely without the financial relief provided by governments in wealthier, more developed regions, with the continent's smaller businesses in the sector most affected. The crisis has also exposed the region's dependence on foreign travelers. This paper will use the East Africa region for the case study analysis. The paper will examine the significance of promoting regional tourism by providing access to member countries especially in the wake of the pandemic. The pandemic has forced most countries to aggressively consider promoting Africa to Africa-ns. The paper will also highlight some of the challenges East African governments may face in developing and promoting tourism products in future.

Keywords: Challenges, East Africa, Region, Tourism, Trends

INTRODUCTION

Tourism is a major world economic activity. Prior to the pandemic, travel & tourism (including its direct, indirect and induced impacts) accounted for

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1 in 4 of all new jobs created across the world, 10.6% of all jobs (334 million), and 10.4% of global GDP (US\$9.2 trillion). Meanwhile, international visitor spending amounted to US\$1.7 trillion in 2019 (6.8% of total exports, 27.4% of global services exports) (www.wttc.org). The tourism industry offers many opportunities to invest in Africa's rich local communities, generate economic activity, and create employment opportunities for women and young people. By 2030, consumer spending in hospitality and recreation in Africa is projected to reach about \$261.77 billion. Tourism has seen continued expansion despite many challenges; it has continued to be resilient. The tourism industry's major function is to serve travellers. Its success depends on the positive inter-relationships of all sectors. It is hoped that this synergy among tourism service providers will translate to a positive experience to the individual tourist (Camilleri, 2018). Many countries, both developed and developing, have recognized the advantages international tourism can contribute to their development efforts (Dieke, 2020; Jenkins, 2015; Sharpley & Telfer, 2015). These advantages can be encapsulated in six areas: earning of foreign exchange, contribution to government revenues, creation of employment opportunities, generation of income, stimulus to inward investment and regional development. Destinations possess tangible characteristics and consist of a number of physical attributes, such as attractions, amenities, buildings, landscapes and so on. Destinations have different appeals to different markets. Some individuals love crowds, others love isolation and find crowded places unbearable. The appeal of the destinations is varied as they offer immense opportunities for tourism to be developed in almost any country, and in any region; provided that they are targeted at the appropriate market (Camilleri, 2018). In 2019, travel & tourism's direct, indirect, and induced impact accounted for: US\$8.9 trillion contribution to the world's GDP, 1,460 million international tourism arrivals, 10.3% of global GDP, 330 million jobs (1 in 10 jobs around the world), US\$1.7 trillion visitor exports (6.8% of total exports, 28.3% of global services exports) and US\$948 billion capital investment (4.3% of total investment). It can therefore be said that global tourism is a major feature in the world economy (www.unwto.org 2020).

The origin countries in many tourism demand studies are usually more sophisticated countries or regions, such as the OECD countries or the EU-28 countries. However, within these regional/ economic compositions, some outliers are present. Origin countries usually investigated include the United Kingdom, United States, France and Germany. However, gradually, Asian-Pacific countries, such as China, Japan, Korea and Australia have attracted more attention. Much of the country choice would be dictated by data availability, author preference or specific international events. Destination countries are in many cases also part of the OECD or EU-28 countries, usually with a warmer climate such as Greece, Spain, Portugal and Italy, or island economies, including Hawaii (state) and Aruba. Recent research has also focused on countries with other attractions, including countries such as Macau and Hong Kong for shopping and casino visits. Concerning Africa, tourism demand studies have mainly focused on individual countries such as South Africa, Zimbabwe, Kenya, Egypt, Tunisia, Mauritius and Nigeria. Exploring more African countries or the continent as a whole or

regionally has attracted less attention (Viljoen et al. 2019). According to (Christie et al. 2014), Africa's tourism is threatened by land availability, investor access to finance, taxes on tourism investments, low levels of tourism skills, lack of security and safety, high crime, public health, visa requirements, red tape and bureaucracy. Fundamental developments by governments regarding air transport infrastructure, appropriate accommodation and access to tour operators are therefore needed (Viljoen et al., 2019).

Regional Tourism Development

The development of tourism in an area is an important thing to strive for. Regional tourism development basically must begin with careful planning. Planning is an important aspect that needs to be considered to avoid failure or less than optimal efforts to develop regional tourism. Otherwise, planning is a fundamental aspect since there have been so many efforts made by both the government and stakeholders related to regional tourism development that is less than optimal and even fails. To develop regional tourism, well designed planning will impact regional progress; it will certainly grow the community's economy and increase the selling value of an area, especially in the tourism sector (Rahman & Salahudin, 2021).

In addition, tourism development is a fundamental part of a sustainable development strategy, which is recognized as a green industry by the world due to its low energy consumption and light pollution characteristics in the development process. Despite being one essential force promoting regional economy, regional tourism itself is greatly influenced by socioeconomic status, including GDP, employment status, personal income, health and hygiene, industrial production index and social media. Besides the socioeconomic condition, research also identified the notable role of the environment in affecting regional tourism, especially climatic conditions, such as temperature, precipitation, sunshine, and relative humidity. Road infrastructure is also a critical environmental driver enhancing the tourism industry (Zhang, et al., 2021).

The unprecedented situation caused by COVID-19 resulted in calls for a re-framing of debates about the global tourism system (Gössling et al., 2020 cited in Rogerson & Baum, 2020). Among others Rowen (2020) considers COVID-19 as a spatio-temporal threshold for transformation of the global travel sector. In common with many tourism scholars (Prideaux et al., 2020) 668assert that for the tourism industry to thrive in a future world it must look beyond the temptation of adopting strategies based on a return to the normal of the past and instead seek to understand how it should respond to the future transformation of the global economy. A process of re-setting and re-envisioning the future of tourism - of what has to change - is a major theme for discussion in contemporary tourism writings. (Galvani et al., 2020). are optimistic that COVID-19 is forcing an expansion of 'global consciousness' and that in future the pandemic will catalyze growing numbers of people, businesses and governments to evolve new ways of thinking and operating that harmonize more closely with the United Nations Sustainable Development Goals. Geography will matter in terms of the impacts of COVID-19 (Rogerson & Baum, 2020).

Tourism in Africa

In recent years, the African tourism economy has seen a steady growth in the number of foreign tourist arrivals; however, this growth is still only prominent in a few African countries. This is in contrast to the potential that tourism development offers the continent in terms of its impact on employment, exports, tax income generation and the stimulation of infrastructure provision (Viljoen, 2019). Further, Fayissa et al, 2008 therefore, correctly point out that the potential for economic development through tourism growth has not been harnessed effectively in Africa. Most tourism studies in Africa have often focused on individual countries. However, with over 1.1 billion Africans expected to be middle class by 2050, it is vital to explore the continent as a whole or regionally. The global regional trends according to (webunwto.org) show that Middle East (+8%) and Asia and the Pacific (+5%) led growth. International arrivals in Africa and Europe (both +4%) grew in line with the world average, while the Americas (+2%) saw more moderate increase. Within Africa, international tourists arrivals were 26.3 million in North Africa and 44.9 million in sub-Saharan Africa. African governments therefore need to invest in infrastructure, reduce local flight tax and create initiatives to promote new locations for local tourism. (Christie et al. 2013). Argue that many African economies still fail to fully understand tourism's potential as a driver of economic development and sustained economic growth. The need for improvement and development is particularly evident when considering regional cooperation and integration of economic policy, infrastructure and management. According to Camilleri, 2018 there are several key elements that are essential to the success of a tourist destination: These are traditionally referred to as the 5A's - including: access, accommodation, attractions, activities and amenities.

The most popular country destinations include: South Africa, Tunisia, Morocco, Mauritius, Seychelles, Kenya, Tanzania, Ghana, Egypt and Namibia. It is important to note that Africa is home to 96 World Heritage properties spread across 35 countries. Fifty three are cultural, thirty eight natural and five mixed. Sixteen properties are in danger. South Africa is leading with (10) sites; Ethiopia (9); Kenya, Tanzania and Senegal (7) each; DRC and Zimbabwe (5) each (whc.unesco.org). Therefore, we have a rich heritage that can be tapped into to be regionally competitive. One of the main competitive advantages of African countries in the global tourism market is their exceptional biodiversity and the opportunity to travel in comfort across the wilderness. A variety of activities are offered to foreign and local tourists in national parks and private reserves where tourist camps and lodges are built. Tourism infrastructure development projects have generated mixed reactions from environmentalists and conservationists, who see them as a potential threat to the ecosystems of national parks. Local communities living near parks and reserves that are actively promoting tourism can also express discontent with the losses they might incur due to the changes in their traditional business environment. Thus, the balance of costs and benefits for individual territories is not always positive. To counterbalance the negative effects that accompany the expansion of tourism-related businesses and to

reconcile the people's interests with nature conservation, sustainable tourism concepts were developed.

Africa's trade pattern is strongly influenced by its past, with the European Union (EU25) and the United States (US) being the continent's main trade partners. The African Development Bank Group (AFDB 2016) states that, during 2014, the combined imports from the US and EU25 (54.3%) and exports (46.7%) to the US and EU25 still represented the majority of trade for Africa, while intra-African trade (exports plus imports) constituted only 18% of total trade. This is in sharp contrast with the dominant role that intra-regional trade plays in other parts of the world, for example in Europe (69%), Asia (52%) and North America (50%), as estimated by the World Economic Forum (WEF 2016). The following reasons were identified as impacting negatively on intra-regional trade in Africa: high transaction costs, complicated immigration procedures, the limited capacity of border officials, costly import and export policy procedures and a lack of investment in trade associations. These factors not only have a negative effect on regional trade, but also influence regional tourism. Africa's traditional trade partners, usually ex-colonial powers, are being replaced by emerging trade partners like China. In recent times, China has made significant investments into Africa by means of trade, specifically imports. It is estimated that imports from China to South Africa (BRICS) are now exceeding US\$15 billion or 19%, followed by Germany (12%) and a mere 6.7% from the USA (Trading Economics, 2019).

Exploring Regional Tourism East Africa

The East African Community (EAC) is a regional intergovernmental organization of six (6) Partner States, comprising Burundi, Kenya, Rwanda, South Sudan, Tanzania and Uganda, with its headquarters in Arusha, Tanzania. Tourism in East Africa is dominated by the safari experience in game parks and reserves, and coastal beaches. The imbalance between wildlife and rural tourism has profound economic, social and environmental impacts especially in certain areas of the country (Okech & Haghiri, 2012).

The EAC pins the tourism sector as a crucial operation for the economy, arguing that it contributed an average of 17 per cent to export earnings and its contribution to GDP is significant standing at around 10 per cent (**Table 1**). East Africa has the ability to remain the most vibrant hotspot for tourism in Africa particularly with the EAC spirit of unity propagated by member states it is up to the individual countries to levitate their tourism potential collectively. Arguably, East Africa has some of the most iconic and the world celebrated attractions. From the dense forests in Volcanoes National Park to the magic and outstanding work of nature in the Ngorongoro Conservation area in Tanzania, the region is endowed with scenic and exotic wonders of nature-wildlife as well as waterfalls, lakes and mountains (**Table 2**). In Tanzania, several efforts have been put in place to bring more visitors to the country's vibrant attractions. This includes developing a more appealing and modernized branding, "unforgettable Tanzania", improving travel means-which has been translated through the establishment of

different travel routes by the national flight carrier, Air Tanzania, to India, China, Nigeria, and Comoros (Mikomangwa, 2022).

Table 1. Country Specific Data (2019).

Country	GDP	Employment	International MN
Tanzania	10.7%	1538.0	1.527
Kenya	8.1%	1548.5	2.049
Uganda	6.2%	589.3	1.543
Rwanda	15.1%	429.0	1.634
Burundi	4.5%	90.1	299, 000 (2017)
South Sudan	N/A	N/A	N/A

Author Compilation

Table 2. Popular Attractions in East Africa.

Kenya	Uganda	Tanzania	Rwanda	Burundi	South Sudan
Masai Mara	Bwindi National Park	Mount Kilimanjaro	Volcanoes NP	Ruvubu NP	Boma NP
Amboseli	Rwenzori Mountain NP	Serengeti NP	Akagera NP	Rusizi River NP	Wau
Tsavo	Queen Elizabeth NP	Zanzibar Beaches	Nyungwe Forest NP	Lake Rwihinda National Reserve	Southern NP
Samburu	Murchison Falls NP	Ngorongoro Conservation Areas	Kigali Genocide Memorial	The Kibira NP	Kidepo Game Reserve
Lake Nakuru	Kibale Forest NP	Lake Manyara NP	King's Palace Museum	Kigwena Natural Forest	Bandingilo NP
Lamu Island	The Source of the Nile	Mafia Island	Lake Kivu	Mount Heha	Kodok
Lake Naivasha	Mt. Elgon NP	Tarangire NP	Gorilla Guardians Village	Saga Beach	Nimule NP
Nairobi National Park	Semliki NP	Pemba Island	Ethnographic Museum	Chutes de la Kerera	Bor
Malindi	Kidepo Valley NP	Stone Town	Kimironko Market	Bururi Nature Reserve	Radom NP
Mombasa	Lake Mburo NP	Selous Game Reserve	Twin Lakes	Vyanda Natural Reserve	Ez Zeraf Game Reserve

Author Compilation

Another major player in the tourism sector in East Africa is Rwanda, an upcoming ICT hub of East Africa, has concentrated efforts on conference tourism through ‘meetings, incentives, conferences and exhibitions (MICE) events. According to International Growth Centre (IGC), the government of Rwanda has made an emphasis on conference tourism, using a contract with the World Bank to “the Business Tourism Company as a consultant to provide strategic oversight and help create the Rwanda Convention Bureau (RCB). The EAC core objectives compel the countries to bring collective efforts to promote their industry and share benefits as they come. So far, the EAC treaty (under Article 115) has shown partner states can undertake and develop collective and coordinated approaches to the promotion and marketing of quality tourism into and within the community (EAC). Hence, the entire concept of coordinating policies in the tourism industry to establish a framework of cooperation is vital, as it will promote the equitable manner of benefit-sharing (Mikomangwa, 2022).

Wildlife tourism continues to be East Africa’s main pull for tourism. The ‘Big Five’ promise (lion, leopard, rhino, elephant, and African Buffalo) is a significant pull factor for inbound tourism destinations such as Uganda, Ethiopia, Rwanda, and Kenya. The concept of wildlife and ecotourism in East Africa are often interchangeable (globaldata.com) Ecotourism is a broader concept encompassing a range of socially responsible tourist activities. This concept typically involves reinvesting tourism income in the local community and conservation programs. This practice is linked with wildlife tourism because income from its wildlife tourism sector is reinvested to protect biodiversity, conservation projects, and local communities.

Moreover, it has enabled destinations in East Africa to build specialist tour packages, including safaris, hiking, bird watching, and volunteering. These packages are ideal for small groups, solo travelers, and niche tourists (**Table 2**). There has been a distinct lack of investment in domestic tourism within East Africa, with tourist boards and tourism companies opting for the higher spending international travelers. According to GlobalData’s tourism spending patterns, the significant difference between international and domestic expenditure is likely a key reason. Although typically, international tourists spend more in any given destination, the difference in East African countries is much more significant (globaldata.com).

RESEARCH METHODOLOGY

This research uses a cast study approach with specific reference to Countries with East Africa. The research analyzed various articles that correlate with tourism trends and challenges in East Africa Multiple articles published in international journals were the data sources used in the study. The reviews in this study was based on several questions including 1) How does EAC promote regional tourism 2) What are the challenges in promoting regional tourism within EAC 3) What are the future plans and implication of tourism in EAC.

DISCUSSIONS

A draft Regional Tourism Marketing Strategy has been developed through a consultative process. The draft Strategy is in the final stages of development and it is aimed at reinforcing the individual efforts of Partner States and providing a framework for cooperation in the promotion and marketing of tourism within the region and internationally (<https://www.eac.int/tourism>). Tourism in the East African region has many opportunities. While affording the travelers an impressive range of options in exploration and relaxation, the region presents incredible potential for investors across the tourism value chain. This includes investment opportunities in the tourism accommodation sub-sector, attraction sites, tour operations, and travel agents among others. Partner States offer diverse investment incentives such as custom duty exemptions for certain items used in the sector. ICT presents huge opportunities for growing and strengthening Africa's tourism development. Tourism destinations are able to increase online presence via the internet and become competitive in the global tourism market through off-line connectivity that offers the requisite tools and applications to undertake effective tourism management through collaboration, clustering, and links with private and public tourism and tourism related actors. Small operators benefit from ICT's ability to support direct and cheap access to existing and potential customers. ICT enables multiple distribution channels, especially to target niche markets that were once almost impossible to identify, reach, or serve. However, for individual African countries to achieve these desired benefits, a complementary infrastructure must be in place. The full benefits of ICT for tourist destinations must be redefined and capable infrastructure must be developed (Bagheri et al., 2018; Judd, 2015; Mudjanarko et al., 2017; Ogechi & Olaniyi, 2020; Wallace, 2018). The current level of ICT infrastructure in East Africa is low, and for a continent where many countries are poor, such improvements are a formidable challenge.

CHALLENGES

Some of the challenges facing the tourism sector in East Africa include:

Inadequate and inefficient infrastructure

Infrastructure is an integral part of a country's tourism package. A few studies have shown the significance of infrastructure as a factor in the demand for international travel. In any country, an important component of this infrastructural base is transportation-roads, rails, seaports, and airports (Khadaroo & Seetanah, 2007). For example, investigated the significance of transport infrastructure as a factor in tourism development in the island of Mauritius. They found that tourists from Asia and Europe/America are reluctant to visit Mauritius because of the island's substandard transport infrastructure, and those from Europe/America are unsatisfied with the island's non transport infrastructure (Ogechi & Olaniyi, 2020). These infrastructure problems, as well as distance, relative prices, and income levels of tourists, were found to be important factors in the tourism demand equation. Other studies that found infrastructure to have a significant

effect on tourism are (Naude' & Saayman, 2005, Adeola et al. 2018). There is lack of proper connectivity from one Country to another for example via rail.

Negative travel advisories

Negative travel advisories from source markets significantly reduce tourism demands. This can be very damaging to fragile economies when constantly and unfairly applied. In East Africa, there has been regular travel advisory especially as a result of terrorism threats.

Stiff competition

East Africa countries are competing with other countries and regions within Africa. There is also the competition from other countries outside Africa. For example, it is considered more expensive to travel within Africa than to go to some countries in Europe. Competition from relatively cheaper destinations is also a threat.

Inadequate financial resources

After the pandemic, the EAC requires a lot of financial resources to jump start the tourism industry again. Many tourism related businesses suffered loss and closed down due to financial constraint. The governments do not have enough resources to give grants to small businesses to stay afloat.

Limited participation in joint international and regional tourism promotion fairs and exhibitions

Countries in EAC promote their own tourism markets for the most part. In future more joint advertising will be necessary to promote the destinations as one bloc. There is need for harmonized policies and regional treaties to encourage and facilitate ease of travel not only for international tourism but also domestic.

Poaching and wildlife habitat loss

The development of tourism in Africa is directly linked to the wildlife conservation. The decline in animal populace is due not only to climate change, population growth, economic pressure on the environment, but also to poaching and illegal trade in African animals. Existing estimates of losses in the tourism industry due to poaching can only give an approximate picture. According to these estimates, elephant poaching costs the continent \$25 million per year. The impact of poaching is particularly evident in Eastern and Southern Africa, where national and private parks provide the bulk of tourism revenue (Suchkova, 2021).

Inadequate Research and Development

There is very little research on tourism in some countries in East Africa. South Sudan for example has little to no data on tourism and its impact on the economy. Burundi has 2017 tourism data. More research and development need to be harnessed to make the destinations competitive.

Terrorist threats, security and crime

Terror attacks are not limited to a particular month or country. As a result, Africa has faced countless travel advisories over the years because of security issues. The terrorist attacks for example in Kenya (1980; 1998; 2002; 2012; 2013; 2014; 2015 and 2019); several times by different militia group in Nigeria such as Boko Haram have all faced sanctions. Other groups responsible include Al Shabab, Al-Qaeda, Lord's Resistance Army, Muslim Brotherhood among others. According to the latest Terrorism Intensity Index (Raymakers, 2020). Burundi saw the greatest increase in risk, dropping 37 places to become the 27th riskiest nation globally.

Côte d'Ivoire (30th) and Tanzania (32nd) witnessed similar falls, while Chad, DR Congo, Ethiopia, Kenya, Mozambique and Senegal also saw their scores significantly worsen. The only African countries to register improvements in the index were Rwanda and Central African Republic (Fourie et.al, 2020). States that the safety and stability of a destination is a factor often overlooked in the tourism demand literature. There are exceptions, though. Uncertainty about personal safety to tourists and those terrorist incidents in a destination country can make foreign tourists reconsider their decision to travel. They refer mainly to political violence or terrorism, but other forms of security threat, such as crime and corruption, may also affect the tourism sector, and a perceived risk of terrorist attacks in a destination can deter tourists even if the attacks are not directly related to tourism. When people decide to visit a destination, they take into account the risk of becoming a victim of an attack and may be deterred if the risk is high. Although it seems obvious that security threats affect inbound tourism, little is known about how safety and security differences between countries may affect the choices of tourists to travel.

CONCLUSION

Prospects for East Africa

There are a number of factors that will support East Africa regional tourism development. Accessibility is paramount. Without proper and direct access to a destination, tourism growth will continue to dwindle and possible decline. From a regional level, competition will still continue and will force countries to improve their service industry to determine which destinations are most useful. I cannot overemphasize the role that ICT plays in ensuring that East Africa remain at the global standards. The availability of human resources will be dependent on intentional planning, change in mindset and goodwill from political hierarchies. Both the public and private sectors will have to be engaged at a more intensive level. The public and private sector must work together to minimize the risk and increase the overall viability of the destinations and to attain a sustainable return on investment. Within the East Africa region, there are signs that governments are moving to a more supportive and facilitating role in the tourism sector and leaving the development to private companies. There have been a number of issues highlighted that challenge the growth of tourism in the region.

Unless these challenges are addressed, it will be impossible to achieve the agenda that seeks to improve regional tourism development. There's hope for East Africa.

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