

The GLOCEPS

Policy Paper

Research Focus: Governance and Ethics

From Borders to Bridges: Leveraging Tourism to Unite and Prosper Eastern Africa

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Executive Summary

Tourism holds untapped potential as a strategic lever for accelerating regional integration across Eastern Africa. Despite accounting for 17% of export earnings, 10% of Gross Domestic Product (GDP), and 7% of employment in the East African Community (EAC), the region's tourism sector remains underutilized. Intra-EAC trade constitutes just 20% of total trade, reflecting low levels of cross-border economic and cultural exchange. Africa's overall share of global trade has stagnated at under 3%, a stark indicator of limited intra-continental engagement.

Revitalizing tourism could stimulate intra-regional trade, improve mobility, and catalyze youth employ-

ment for the region's rapidly growing population, 40% of whom remain unemployed. The sector also offers pathways to economic diversification, cross-cultural unity, and environmental sustainability, aligning with the aspirations of the African Continental Free Trade Area (AfCFTA). However, progress is hampered by inadequate infrastructure, fragmented regional branding, weak tourism governance, unsustainable practices, and skill shortages.

This policy brief recommends a harmonized strategy to elevate tourism's role in regional integration. Key proposals include adopting a unified tourism branding act, establishing a Tourism



infrastructure Fund, fast-tracking the EAC Single Tourist Visa, enforcing sustainable tourism standards ratified in 2023, and fostering industry-academia collaboration. These actions aim to position the EAC as a globally competitive, cohesive tourism destination capable of capturing a meaningful share of the projected \$1.9 trillion global tourism market by 2030.



Context

Tourism is increasingly recognized as a driver of economic growth, social cohesion, and peace-building across Africa. It enhances people-to-people connections, stimulates cross-border trade, and fosters regional collaboration. In 2023, intra-African tourism accounted for 60% of international arrivals, reflecting growing continental mobility aided by regional frameworks such as AfCFTA.

The East African Community (EAC), which includes Burundi, DRC, Kenya, Rwanda, Somalia, South Sudan, Tanzania, and Uganda, envisions deepening integration across political, economic, social, and cultural spheres. Tourism is central to this vision. From 2006 to 2019, tourist arrivals in the region nearly doubled from 3.47 million to 6.95 million, highlighting its rising importance and potential.

Yet, the EAC lags in global and intra-African comparisons. The Africa Regional Integration

Index (ARII), which measures integration based on trade, infrastructure, and mobility, places Eastern Africa behind other blocs like the Economic Community of West African States (ECOWAS) and the Association of Southeast Asian Nations (ASEAN). Whereas intra-African trade stands at just 15%, the European Union (EU) and ASEAN boast intra-bloc trade levels of 64% and 24%, respectively. Tourism, a multiplier sector, could bridge this gap spurring demand for African goods, services, and culture.

Challenges such as non-tariff barriers, inadequate infrastructure, political fragmentation, and disjointed tourism policies continue to constrain the EAC's integration potential. In contrast, the EU's supra-national institutions, harmonized regulations, and infrastructure networks have enabled smooth cross-border travel and trade. Similarly, ASEAN's market-driven integration strategy has leveraged tourism to anchor value chains and unify the region.

The EAC's youth-dominated population, comprising 60% under 25 underscores the urgency of utilizing tourism for inclusive growth. The sector not only supports traditional industries like agriculture and transport but also enhances cultural diplomacy, economic complementarity, and people-centered integration. Harnessing these opportunities requires a coordinated tourism policy agenda.





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Key Issues

a) Tourism Infrastructure and Accessibility

Infrastructure remains the bedrock of successful regional tourism. However, the EAC faces severe deficits. Only 30% of planned regional corridors, such as the Northern Corridor linking Kenya and Uganda, are functional. High flight costs, inadequate road networks, and limited cross-border transport options make intra-regional travel costly and inconvenient, an issue compounded by weak public-private partnerships (PPPs).

Infrastructure investment in the EAC stands at roughly \$1 billion annually, which is far below the EU's \$20 billion and ASEAN's more coordinated investment structures. Establishing an EAC Tourism Infrastructure Fund can mobilize development financing and prioritize connectivity to high-potential tourist sites like the Maasai Mara, Bwindi Impenetrable Forest, and Kilimanjaro.

Accessibility is another critical challenge. Only 10% of hotels and tourist facilities meet global accessibility standards, excluding travelers with disabilities and the elderly. In contrast, the EU's Accessible Tourism Guide sets the benchmark at 50%. ASEAN also offers diverse accommodation from eco-hostels to high-end resorts. EAC's

limited accommodation diversity and absence of region-wide accessibility policies hinder inclusivity and limit market expansion.

Adopting regional accessibility standards, modeled on the EU and ASEAN, would ensure all travelers, including marginalized groups, are accommodated. Subsidies and grants could incentivize private investment in accessible and eco-friendly tourism infrastructure, aligning the region with global trends where 15% of travelers require accessible services.

b) Regional Branding

A fragmented regional identity undermines the EAC's ability to attract tourists seeking multi-country experiences. National campaigns such as "Magical Kenya" and "Unforgettable Tanzania" operate in silos, diluting the broader "Visit East Africa" brand launched at ITB Berlin in 2023. Protectionist tendencies have led member states to prioritize individual visibility over collective competitiveness. Between 2006 and 2019, tourist arrivals in the region grew by over 100%, underscoring the potential of cohesive branding. ASEAN's unified campaign, dubbed "Southeast Asia: Feel the Warmth," demonstrates the benefits of harmonized messaging, encouraging tourists to explore multiple destinations under one umbrella brand.

The EAC lacks standardized visual identity and messaging. Legislating a "Magical Eastern Africa and Africa Act" could formalize collective branding



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guidelines. Adopting a model similar to the EU's "Europe: Where the World Meets" campaign would allow the EAC to highlight its cultural and ecological diversity while promoting multi-destination travel.

Furthermore, the region underutilizes digital marketing. With only \$2 million in digital budget compared to ASEAN's \$50 million, EAC's visibility is low. Only 5% of tourism personnel are trained in digital marketing, reducing the effectiveness of outreach. Generation Z and millennials, who make up 30% of global tourists, are heavily reliant on digital platforms. Investing in AI-driven campaigns, influencer marketing, and regional digital hubs can broaden reach and enhance engagement.



Photo Credit: Tripadvisor.com

c) Sustainability of Tourism Standards

Environmental degradation is undermining the EAC's long-term tourism viability. Deforestation in Uganda's Bwindi Forest, Kenya's Mau Forest, and DRC's rainforests, as well as persistent poaching, have reduced biodiversity and diminished the appeal of ecological tourism. Since 2010, the EAC has lost 30% of its rhino population, primarily due to weak enforcement and underfunding of conservation programs.

Only 20% of environmental regulations are effectively implemented. The region allocates around \$10 million annually for conservation, far

below the EU's \$500 million. To reverse this trend, EAC should ratify and enforce the 2023 sustainable tourism standards, drawing from the EU's Natura 2000 model that protects 18% of land and marine ecosystems.

Community-based tourism (CBT) offers an inclusive model. Rwanda's CBT initiatives generate \$5 million annually but remain underutilized regionally. Only 10% of EAC tourism revenue reaches local communities, compared to 30% in ASEAN. Promoting policies such as Thailand's homestay program and Kenya's community conservancies would ensure equitable distribution of benefits and strengthen social cohesion.

Global trends show that 50% of travelers now prioritize sustainability and community impact in their travel decisions. Embracing eco-certification, green investments, and community engagement will position EAC as a responsible and inclusive tourism destination.

d) Human Resource Development

Tourism in Eastern Africa suffers from a persistent skills gap. Only 15% of tourism workers have received specialized training, compared to 40% in ASEAN. Most jobs offer limited advancement, with 60% lacking clear career pathways. The sector suffers from a \$3 million annual shortfall in training investment, stunting service quality and competitiveness.

The EU's Erasmus+ program, which trains 10,000 students annually, offers a model for scaling up training in the EAC. Aligning the EAC's Regional Tourism Capacity Development Programme with industry demands such as sustainable tourism, digital skills, and customer service would enhance quality across the tourism value chain.

Industry-academia disconnects exacerbate the skills gap. Currently, only 10% of tourism training





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programs involve business partnerships. The East African College of Tourism trains around 500 students annually but lacks curriculum alignment with market needs. ASEAN, by contrast, has achieved 70% industry participation in curricula design.

Introducing apprenticeship schemes, student exchange programs, and public-private training initiatives can improve graduate preparedness and service quality. With 80% of tourists prioritizing customer experience, a well-trained workforce will be essential in transforming the EAC into a premier destination.

e) Regional Cooperation and Governance

Fragmented governance structures and policy misalignment are major roadblocks to tourism-driven integration. The EAC Single Tourist Visa, introduced to facilitate multi-country travel, has been adopted by only three countries, including Kenya, Rwanda, and Uganda. This undermines regional travel despite the visa's proven potential mirrored by the EU's Schengen system, which enables 400 million trips annually.

Only 40% of EAC member states prioritize national over regional tourism policies. Budget allocations remain limited to about \$5 million annually versus ASEAN's \$30 million. The 2023 Draft Protocol on

Tourism and Wildlife Management offers a pathway to standardization but requires urgent ratification and enforcement.

Weak enforcement also impairs tourism outcomes. Only 50% of the 2021–2025 EAC Tourism Marketing Strategy has been implemented. Stakeholder engagement remains low, with just 20% of tourism boards involving community and private sector players.



Photo Credit: Rwandaintanzania

A high-level EAC Tourism Coordination Committee, modeled on the EU's tourism taskforce, can ensure alignment, accountability, and representation. Robust monitoring frameworks, inspired by ASEAN's tourism agreements, are essential to track compliance and performance. With 60% of destinations globally citing governance as a critical factor, EAC's institutional reforms are central to unlocking tourism's integrative power.

Conclusion

Tourism represents a strategic and inclusive pathway to achieving deeper regional integration in Eastern Africa. The sector's capacity to drive economic diversification, create employment, foster cross-cultural exchange, and unify fragmented markets positions it as a cornerstone of EAC's development agenda. However, systemic barriers including infrastructure deficits, disjointed branding, unsustainable practices, weak policy enforcement, and skill shortages continue to constrain progress.



To compete in the \$1.9 trillion global tourism market and meet AfCFTA's integration targets, EAC should adopt a comprehensive, coordinated, and forward-looking tourism strategy. This involves harmonizing visa and regulatory regimes, investing in infrastructure and capacity development, embracing digital and sustainable tourism trends, and fostering a unified regional identity. These measures will not only elevate EAC's global standing but also create meaningful socio-economic opportunities for its youthful population and marginalized communities.



Recommendations

The EAC member states, through their Ministries of Tourism, Trade, and Infrastructure, should;

- a) legislate a "Magical Eastern Africa and Africa Act" to institutionalize unified branding under a regional campaign: "Visit (East) Africa";
- b) develop and implement a regional tourism infrastructure master plan prioritizing connectivity to key sites like Maasai Mara and Bwindi Forest;
- c) revise the EAC Tourism Strategy (2021–2025) to incorporate regional accessibility and inclusion standards;
- d) intensify joint trade exhibitions and regional tourism marketing efforts across global forums;
- e) fast-track adoption and full implementation of the EAC Single Tourist Visa across all member states;
- f) establish an EAC Tourism Infrastructure Fund to address funding gaps in cross-border connectivity;
- g) invest in AI-powered and data-driven digital marketing modeled after the EU's digital tourism hub;
- h) scale capacity-building for tourism boards in digital marketing and analytics;
- i) promote community-led tourism through influencers, eco-certifications, and inclusive storytelling;
- j) develop and implement community revenue-sharing models like Thailand's CBT to ensure inclusive development;
- k) enforce the 2023 EAC sustainable tourism standards across all member states;





- l) align tourism training programs with market needs and global service expectations;
- m) strengthen partnerships between academia and the tourism industry to improve curriculum relevance;
- n) enforce the 2023 Draft Protocol on Tourism and Wildlife Management to harmonize governance; and
- o) establish a high-level EAC Tourism Coordination Committee to oversee integration, compliance, and stakeholder engagement.



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