

DATA AND DIGITAL PLATFORMS

Driving the Tourism Recovery in Rwanda



TOURISM
ECONOMICS

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Executive Summary

The tourism industry has suffered more than any other sector due to COVID-19 and the resulting global economic recession; the challenges to a full recovery in travel are formidable. Digital content and platforms have been proven to drive growth in travel. This study seeks to identify how data and these online platforms can be leveraged to influence the recovery in travel and the economy.

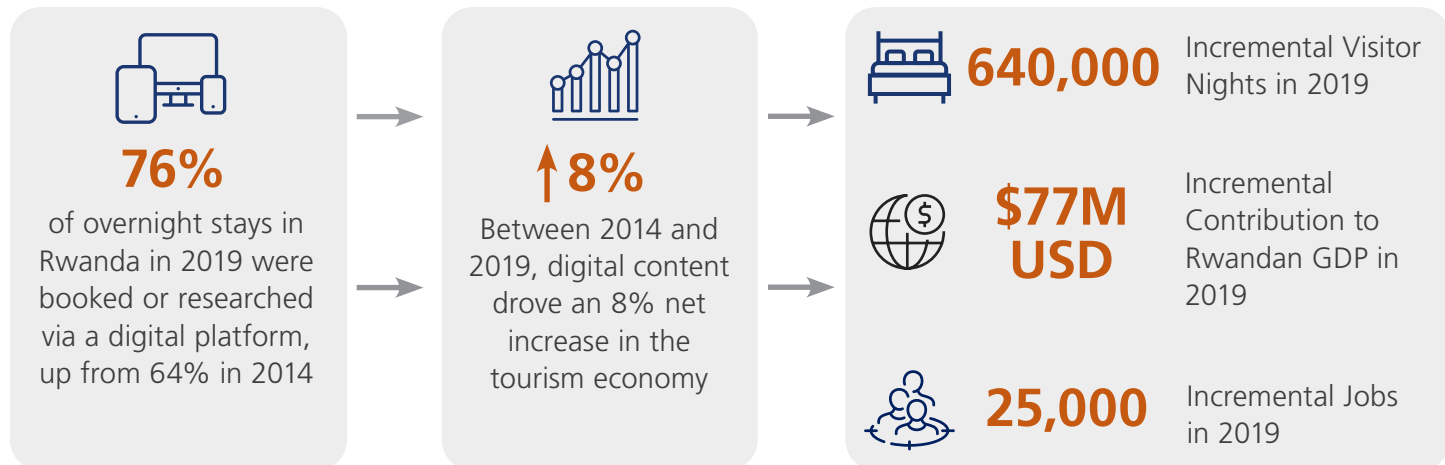
The Economic Impact of Tourism in Rwanda

Domestic and international visitor spending in the Rwandan economy directly contributed US\$400 million to Rwandan GDP and supported a US\$1.0 billion total impact including indirect and induced impacts. The Rwandan travel and tourism industry represented 10% of total GDP in 2019. This economic activity supported 338,000 jobs.

Travel and Tourism Industry Impacts in Rwanda in 2019



Digital Content Drives Travel



Opportunity to Accelerate the Recovery

Tourism Economics modeled two scenarios for the future of tourism in Rwanda.

Baseline Outlook

Rwanda's visitor volumes and visitor spending are set to fully recover to 2019 levels by 2023. Employment contributions will surpass prior levels by 2025.

Opportunity Outlook:

An increase in the use of digital platforms to meet source market preferences and match competitors will increase destination competitiveness and market share. Tourism Economics has estimated the potential gains in addition to baseline growth as a result of digital advances.

Potential Gains Attributable to Digital Advances



Baseline Outlook and Potential Additional Growth Attributable to Higher Online Presence

		2021	2022	2023	2024	2025
Nights (millions)	Baseline	5.8	7.6	9.2	10.3	11.3
	Opportunity Outlook	5.8	7.7	9.4	10.6	11.7
	Potential Increase	0.1	0.1	0.2	0.3	0.4
Spend (US\$ millions)	Baseline	570	700	810	900	1,000
	Opportunity Outlook	577	714	832	832	1,042
	Potential Increase	7	14	22	32	42
GDP (US\$ millions)	Baseline	690	880	1,040	1,170	1,320
	Opportunity Outlook	697	895	1,064	1,205	1,366
	Potential Increase	7	15	24	35	46
Jobs (thousands)	Baseline	211	258	292	317	342
	Opportunity Outlook	213	261	298	324	352
	Potential Increase	2	4	6	8	10

E1 The Economic Impact of Tourism in Rwanda

Travel and Tourism Makes a Significant Contribution to National Income

From 2010 to 2019, total overnight visitation to Rwanda more than doubled.¹ International overnight stays rose nearly 125% over these 10 years, while domestic visits increased more than 70%.

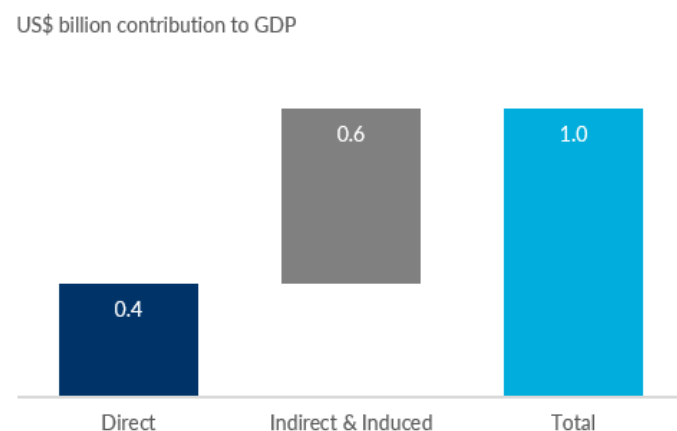
In 2019, domestic and international visitor spending directly contributed US\$400 million to Rwandan GDP and supported a US\$1 billion total impact including indirect and induced impacts. The Rwandan travel and tourism industry represented 10% of total GDP in 2019, with this economic activity supporting nearly 338,000 jobs (equivalent to more than 1 in every 11 jobs).²

Tourism Has Experienced Massive Losses

Total visitor spend declined approximately US\$300 million in 2020, representing a more than 40% drop from 2019 levels.³ The international market experienced the most acute losses, with inbound spending down an estimated 60% in 2020. The bulk of travel and tourism spend in Rwanda in 2020 was generated by domestic visitors' day visitation.

The reduction in visitor spending in 2020 jeopardized more than 175,000 jobs within the travel and tourism sector and related industries.

Figure E1: Travel and Tourism's GDP Contributions to the Rwandan Economy, 2019



Source: Tourism Economics, WTTC

E2 Digital Content Drives Travel Activity

Digital content and online platforms can elevate the ability of a destination to reach travelers across the globe throughout each stage of the travel planning process: Dreaming, Planning, Booking, Experiencing, and Sharing. Travelers are accessible across all five stages of travel planning through a robust digital presence that inspires travel, produces confidence in the product, reduces friction in booking, and enables shared experiences.

The majority (76%) of overnight stays in Rwanda in 2019 were booked or researched via digital platforms, up from 57% of overnight stays in 2012. Economic modeling identified a causal relationship between increasing use of digital platforms and growth in the tourism economy. Increasing digital content use from 2014 to 2019 contributed an additional US\$77 million to Rwandan GDP in 2019 and supported 25,000 jobs. Digital content increased tourism activity 8% over the past five years, helping to offset some of the decline in total tourist nights in Rwanda which peaked in 2014.

E3 The Benefits of Digital Platforms

When businesses adapt existing digital processes to best fit the environment and future of the tourism industry, they produce productivity gains that generate ripple effects across the economy. These digital investments encourage destinations to become more creative and competitive at attracting traveler demand, while simultaneously improving their own business practices.

Figure E2: The Five Stages of Travel Planning



The nearly 640,000 additional visitor nights resulting from the increased use of digital platforms and tools generated US\$77 million in Rwandan GDP in 2019

More specifically, digital platforms provide the following benefits:

- **Scalability.** Easily share content and messaging to a large population at a relatively low cost.
- **Agility.** Quickly adapt content and messaging for the current environment.
- **Efficiency.** Target travelers based on active travel intenders and other psychographic considerations.
- **Geolocation.** Better understand how visitors travel throughout the destination and learn about consumer preferences, which can be leveraged to support investment decisions. The use of this technology should follow data privacy regulations. Technology platforms with geolocation capabilities should always ensure the user is aware of this use and that they can decline sharing their data.
- **Marketing return on investment (ROI).** Gauge the effectiveness or ROI of digital marketing campaigns, which can help refine and adjust future campaigns.
- **Brand Development.** Develop authentic brands that can be consistently used and easily adopted across the industry.

Many of the benefits of digital platforms are grounded in data analytics, which have become increasingly important to the tourism industry in recent years and even more so during the pandemic. Ultimately, data and research—the majority of which derive from digital platforms—serve as the basis for a destination's marketing decisions and product offering.

E4 Recommendations for Recovery

Destinations, governments and private sector businesses affiliated with the tourism industry in Rwanda must take immediate actions to support a robust recovery through digital transformation. Destination marketing organizations (DMOs) are adding a destination management function to their mandate, leveraging new technologies, and engaging with community stakeholders—all while operating with reduced budgets due to COVID-19.

Although some of these new roles were starting to be implemented in recent years, the pandemic

accelerated the transition, especially as it relates to leveraging new technologies and digital platforms. These important tools quickly allowed DMOs to shift their role and messaging from just marketing the destination to promoting the health and safety protocols implemented throughout the region, which helped to build consumer confidence and keep the destination top of mind for future travelers.

Despite the current realities of reduced travel, Rwanda must focus on recovery now, which will be largely driven using digital platforms, online content, and data analytics.

We recommend the following actions to support tourism recovery:

1. Secure DMO funding

The Chief Tourism Office (CTO), which is a department within the Rwanda Development Board (RDB), serves as the entity responsible for developing and promoting tourism at the national level. The CTO should secure funding from multiple sources in the public and private sectors. Where possible, governments should protect the budgets of DMOs over the coming years. Although funding will be difficult to secure during the pandemic, governments should recognize it is a critical investment and priority that will help to accelerate tourism recovery.

2. Improve telecom infrastructure

The private sector in Rwanda should work alongside the government to ensure that the goals established by the Rwanda Information Society Authority (RISA) and SMART Rwanda are achieved. Implementing faster broadband connectivity for businesses, residents, and visitors will make Rwanda a better destination to live and visit.

Increased access to high-quality and affordable broadband along with other digital infrastructure is vital if tourism businesses operating in rural areas are to receive the full benefits of engaging with digital platforms and utilizing data analytics. Decreasing the relative cost of smartphones for Rwandans will encourage mobile device use. Good mobile coverage for tourists visiting rural areas is also key, especially for the experiencing and sharing stages of the traveler journey.

Digital platforms have played a critical role in the growth of the tourism industry and will continue to do so. In fact, digital will play a far greater role this year, and in the coming years, as the tourism industry recovers from the pandemic.

3. Upgrade and expand digital capabilities and skills

If private sector businesses throughout the country enhanced their digital presence, it would enhance the entire destination's digital ecosystem, making it more known to prospective travelers.

The CTO should also allocate resources to educate local tourism businesses about digital best practices and collaborate with universities and digital companies to develop a more robust digital skills education platform.

Enhancing the access tourism businesses have to digital experts, industry leaders, training, and information will facilitate the integration of digital technologies and improve awareness of the benefits of digital transformation. Another way to enable this is through encouraging partnerships and collaborations between traditional tourism small and medium-sized enterprises (SMEs) and education institutions and/or digital organizations.⁴

4. Build a consistent brand message through digital collaboration

DMOs and the private sector must align marketing messaging and tactics. This should include enhancing relationships between government entities, international digital platforms, and local businesses to develop a common vision and collective strategy for the destination.

The CTO can lead this process by supporting the integration of travel partner audience segments

(e.g. Travelstart, RwandAir, Viruna Lodge, Kigali Serena Hotel, Sabyinyo Silverback Lodge, Volcanoes National Park, Nyungwe Forest National Park, etc.), and by developing a content strategy framework for messaging across all channels of communication.

Digital tools can support this with common media platforms, branding, messaging, and an integrated strategy. This will allow for cooperative marketing and shared content to present a brand message that is consistent and powerful.

5. Utilize data analytics to support decision making

DMOs and businesses should take advantage of the wealth of data that digital platforms provide. Insights-based data from mobile devices, social media, online travel agencies, tech companies, local tourism businesses and others will directly inform and refine marketing campaigns and strategic decisions. Tech companies and consultants are positioned to support DMOs in creating a data ecosystem with the key stakeholders of a destination. The CTO should explore whether this support could help with other ways to apply data analytics.

Public bodies can play a leading role in encouraging the use of data analytics in tourism SMEs in Rwanda through the development of targeted initiatives to support the integration of these technologies and promote a digital outlook. Initiatives can range from one-on-one mentoring programs and outreach events to the development of travel-tech incubators and accelerators, to funding and incentive programs.⁵

6. Continue to tell stories with the extended reach of digital platforms, including social media

Travelers are still dreaming and ready to travel when it is safe. The tourism industry in Rwanda should continue to focus marketing efforts toward domestic and regional (Sub-Saharan Africa) travel while safety

Baseline Outlook and Potential Growth Attributable to Higher Online Presence for Rwanda

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Nights (millions)	Baseline	5.8	7.6	9.2	10.3	11.3
	Opportunity Outlook	5.8	7.7	9.4	10.6	11.7
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Jobs (thousands)	Baseline	211	258	292	317	342
	Opportunity Outlook	213	261	298	324	352
	Potential Increase	2	4	6	8	10

concerns and restrictions related to international travel are in place. Digital platforms are uniquely able to keep Rwanda a preeminent destination.

DMOs in Rwanda should educate local tourism businesses how to effectively use social media for storytelling, a highly effective and low-cost method that resonates with a vast number of consumers that frequently use social media platforms in source markets.

7. Adapt to new consumer sensitivities

The travel and tourism industry must consider new consumer travel behaviors resulting from the pandemic when developing future marketing campaigns. Messaging should be designed to build trust and communicate health and safety protocols.

Baseline Outlook

Rwanda's visitor volumes and spending are set to fully recover to 2019 levels by 2023. This outlook is consistent with past market share and expectations for source market demand. Total employment contributions from travel and tourism to Rwanda will reach prior levels by 2025.

Opportunity Outlook

Rwanda can accelerate the recovery by aggressively leveraging digital tools in marketing, research, and destination management.

A clear opportunity exists to reach a larger audience of both domestic and international tourists and influence their travel decisions. More widespread use of digital platforms and content will be facilitated by the above recommendations. This will produce increased reach, greater effectiveness, and significant economic gains.

The current crisis presents an opportunity for Rwanda to embrace digital technologies and realize their benefits. Extending the econometric model identifying the relationship between digital adoption and travel growth (outlined in E2), Tourism Economics considered the scope for increased use of digital

E5 Opportunity to Accelerate the Recovery

Tourism Economics modeled two scenarios for the future of Rwandan tourism. The first (baseline outlook) assumes no change in strategy or adoption of digital content and platforms. The second (opportunity outlook) assumes that Rwanda advances its digital strategy as outlined in our recommendations.

Key Recommended Actions



Secure DMO Funding



Improve telecom infrastructure



Upgrade and expand digital capabilities and skills



Build a consistent brand message through digital collaboration



Utilize data analytics to support decision making



Continue to tell stories with the extended reach of digital platforms



Adapt to new consumer sensitivities

platforms for travel planning as a result of new investment and other adoption of best practices described above. An increase in the use of digital platforms to meet source market preferences and match competitors will increase traveler confidence, destination competitiveness and market share. Tourism Economics has estimated the potential gains in addition to baseline growth as a result of digital advances. This includes the following improvements by 2025:

- 10,000 new jobs supported (direct, indirect, induced)
- 400,000 more overnights in Rwanda
- US\$117 million cumulative increase in tourism spending over the five-year period.

Potential Gains Attributable to Digital Advances

An increase in the use of digital platforms to meet source market preferences and match competitors will increase destination competitiveness and market share. Tourism Economics has estimated the potential gains in addition to baseline growth as a result of digital advances.



10,000

New Jobs Supported
(Direct, Indirect, Induced Jobs)



400,000

Incremental Overnight Stays in
Rwanda in 2025



\$117M USD

Cumulative Increase in Tourism
Spending Over the Five-Year Period



1 Introduction

The travel industry has suffered more than any other sector due to COVID-19 and the resulting global economic recession. Within this context, it is imperative that policymakers implement strategies that will accelerate the travel recovery. Digital content and platforms have been proven to drive growth in this sector.

This study seeks to identify how data and online platforms can be leveraged to encourage the recovery in travel and the wider economy. This includes identifying public policies and government-led business strategies or campaigns that will utilize digital transformation and online platforms to recover the tourism industry. This report was commissioned by Google.

There are four strands of analysis considered in this study:

1. **The economic importance of tourism to the economy of Rwanda**—assessing the economic value of travel activity and its contribution to the wider economy over the past decade as well as the estimated losses in 2020.
2. **The role of digital content and online platforms in generating travel activity**—identifying the extent to which data and online platforms influence and change behavior, drive additional flows of people, and contribute to economic growth.
3. **How digital content and online platforms can support the recovery in travel**—including recommendations for how destinations and businesses can leverage digital content to accelerate recovery.
4. **A scenario analysis that quantifies how online platforms can accelerate the recovery**—analyzing the historic relationship between travel growth and digital platform engagement to provide a basis for assessing the role that digital content can play in the recovery.

2 The Impact of Travel in Rwanda

The travel and tourism industry of Rwanda represented 10% of total GDP in 2019. Total employment supported by tourism totaled 338,000 jobs. The shock to travel brought on by the coronavirus pandemic could lead to long-lasting effects on the Rwandan economy. The estimated reduction in visitor spending in 2020 of over US\$300 million will put over 175,000 jobs at risk within the travel and tourism economy.

This chapter covers the state of travel across Rwanda from 2010 to 2020 by measuring visits and visitor spending, as well as the economic impact across tourism-related GDP and employment.⁶ This analysis was carried out using Tourism Economics' existing forecast models—Global Tourism Service (GTS) model.

The **GTS model** includes historic data and forecasts for economic growth and travel demand for all source markets and destinations worldwide, including country-to-country flows. The GTS model allows the production of a range of forecasts from alternative assumptions.

2.1 Visits

From 2010 to 2019, overall tourism growth in Rwanda—in terms of visitation—experienced significant growth.

In 2019, total visits peaked at 1.3 million, twice as large as the 600,000 visits in 2010.⁷ Domestic overnight stays grew more than 70% over the course of 10 years, while international visitation rose nearly 125% during the same time period, reaching 1.1 million overnight visits in 2019.

The spread of the coronavirus in 2020 has severely impacted the conditions that underpin travel and tourism across the globe.

The first case of the coronavirus in Rwanda was announced March 14, 2020.⁸ By March 21, the Rwandan government had restricted travel between cities and closed its borders.⁹ In addition to the official restrictions imposed on travel between and within countries and regions, the coronavirus pandemic depressed traveler sentiment while households were hit with increased unemployment and wage losses—Oxford Economics currently forecasts GDP in Rwanda to have fallen 2% in 2020

Figure 1: Rwanda Overnight Visit Levels

Millions of visitors each year

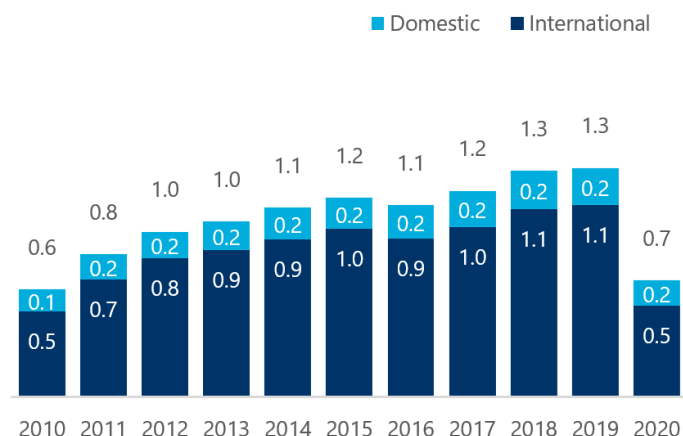
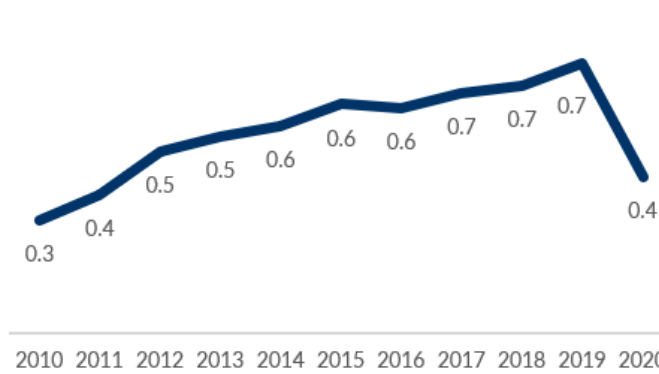


Figure 2: Total Visitor Spending in Rwanda

US\$ billion of spending each year



Source: Tourism Economics, International Monetary Fund

Source: Tourism Economics, Rwanda Development Board, UNWTO
*Domestic visits relate to hotel guests and does not include overnight stays in other types of accommodations.



Travel demand in Rwanda fell around 50% in 2020

on top of other declines in recent years.¹⁰ These factors, along with additional supply-side reactions such as event cancellations, contributed to a significant reduction in domestic and international visitor numbers in 2020.

We estimate that travel demand in Rwanda fell nearly 50% in 2020, equal to more than 650 million fewer overnight visits.

Rwanda's international flights officially began to resume on June 17, 2020, first with charter flights, with commercial flights following by August 1.¹¹ International overnight visits dropped from about 1.3 million to 700,000, nearly half of the level in 2019. Domestic travel also experienced a significant decline; we estimate overnight visits fell more than 30% to just over 525,000 in 2020.

2.2 Spending

In 2019, total visitor spending—which includes day visit spend as well as overnight spend in Rwanda—totaled US\$740 million, more than double its level since 2010.¹²

Domestic tourism represented 47% of total tourism spend in 2019. From 2010 to 2019, domestic spend grew to US\$350 million, more than tripling the US\$110 million spent in 2010. The strongest period

of domestic spend growth continued from 2010 to 2014—years which saw an expanding Rwandan middle class as real GDP grew 9% per year on average. From 2010 to 2019, international spend grew nearly 95% representing US\$390 million by 2019. Rwandan tourism has boosted visitation throughout the last decade thanks to a series of strategic investments across infrastructure including airline and hotel expansion. Rwanda continues to build its tourism economy with the help of regional and global investors who see opportunities within the growing tourism sector.¹³

In 2020, we estimate that total visitor spend declined by over US\$300 million.

Domestic travel spend is estimated to have fallen around 30% while international spend plummeted nearly 60%.

With high-risk countries maintaining travel restrictions and surging cases in other countries causing renewed lockdowns, domestic tourism will be paramount to the recovery.

Domestic travel spending has been relatively more resilient and is expected to rebound faster than international markets.

2.3 Economic Impact

The economic impact of tourism in this analysis is expressed in terms of its annual contribution to GDP and the total number of jobs it supports.¹⁴

Tourism Spending's Link to Tourism Direct GDP

Total tourism expenditure comprises all tourism expenditure of visitors, both resident and non-resident, within the economy of reference. It is the sum of domestic tourism expenditure and inbound tourism expenditure. It includes acquisition of goods and services imported into the country of reference and sold to visitors.

Tourism direct GDP is the sum of the part of gross value added generated by all industries, net of purchases, in response to tourism expenditure plus the amount of net taxes on products and imports included within the value of this expenditure.

The **gross value-added contribution** of an industry is defined as the value of its output minus its purchases of goods and services used in the production process from other firms.

Tourism direct GDP measures the total economic output of the tourism activity within a country and can be used to judge the rate of growth of the tourism industry within an economy.

Tourism GDP figures used in this research are consistent with the annual economic impact research published by WTTC (and produced in collaboration with Oxford Economics). Analysis is consistent with the UN-statistics division approved recommended methodological framework (TSA:RMF 2008) and benchmarked to detailed country accounts.

For further information on key tourism definitions see the UNWTO glossary of tourism terms web page.

This assessment begins with the impact of spending by tourists, but also considers the downstream effects of this injection of spending into the Rwandan economy. This activity can be grouped into three core channels of activity: direct, indirect, and induced. The sum of these three channels creates the total economic impact.

- **Direct impacts** occur through spending within a specific group of sectors (e.g. recreation, transportation). This supports a relative proportion of jobs and GDP within each sector.
- **Indirect impacts** stem from supply chain spending, where each directly affected sector also purchases goods and services as inputs (e.g. food wholesalers, utilities) into production.
- **Induced impacts** are generated when employees whose wages are generated, either directly or indirectly, by travel and tourism spend those wages in the local economy.

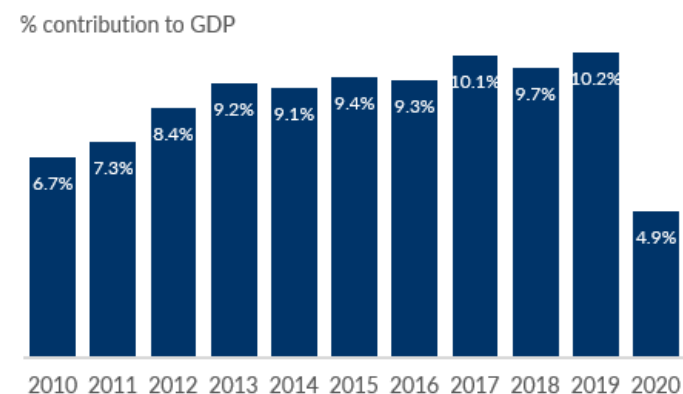
Travel and tourism directly contributed US\$400 million to Rwandan GDP in 2019, and US\$1 billion total impact including indirect and induced impacts. The Rwandan travel and tourism industry represented 10% of total GDP in 2019.

Employment in Rwanda directly supported by the travel and tourism industry reached more than 120,000 jobs in 2019. Total employment as a result of tourism measured 338,000 jobs in 2019. Total employment supported by tourism doubled between 2010 and 2019, an annualized rate of 8.1%.

Without intervention, the shock to international travel brought on by the coronavirus pandemic could lead

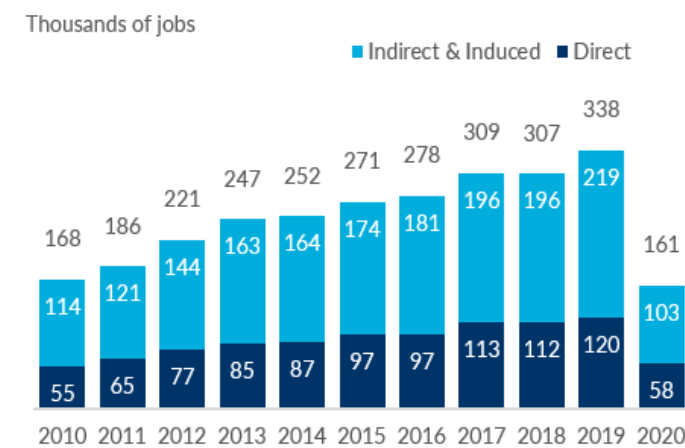
to lasting effects on the Rwandan economy. A loss in Rwandan GDP of over US\$500 million in 2020 is estimated, and this alone will have put more than 175,000 tourism-related jobs at risk. Our current estimates indicate that the number of tourism-supported jobs has fallen more than 50% from 2019 levels.

Figure 3: Travel and Tourism's GDP Contributions to the Rwandan Economy, 2010 to 2020



Source: Tourism Economics, WTTC

Figure 4: Travel and Tourism's Total Employment Contribution to the Rwandan Economy, 2010 to 2020



Source: Tourism Economics, WTTC

3 The Role of Digital Content and Online Platforms in Generating Travel

Our research examines the relationship between increasing investment in digital platforms and the outward effect this expansion has on the tourism economy. Increasing strategic digital content use contributed an additional US\$77 million to Rwandan GDP in 2019 and supported 25,000 jobs.

Digital content and online platforms support a range of benefits to travelers, tourism businesses, and the broader economy. This chapter presents the impact of digital content, tools, and platforms on the travel economy.

3.1 Digital as a Catalyst for Travel

Digital content and online platforms can elevate the influence of a destination to reach travelers across the globe throughout each stage of the travel planning process: Dreaming, Planning, Booking, Experiencing, and Sharing.¹⁵ Travelers utilize diverse online resources to efficiently tailor an itinerary to their preferences. These stages of planning represent unique points at which curated digital content and online platforms can be used to influence the decision-making process.

1. **Dreaming** is the first stage of the travel planning process, where travelers think creatively on destinations they would like to visit. Digital content uniquely fuels these dreams through online searches that match potential travelers with stories, images, descriptions, and virtual experiences that explore specific destinations, cultures, cuisines, and more.
2. **Planning** is the next stage for people who have decided on a general destination or multiple locations. In this stage, travelers analyze available transportation, accommodations, and experiences related to each destination. Online searches can help travelers find the best option that aligns with their preferences through reviews, online and social media presence, and online booking connections.
3. **Booking** is the third stage of planning which includes the first purchases made toward the travel experience. Travelers often begin this step by searching for easy-to-use digital platforms that offer quick and transparent transactions. Digital platforms provide the dual benefits of reduced

Digital content and online platforms provide crucial data that informs business and destination strategy

friction (ease) and pricing transparency in the booking process.

4. **Experiencing** a destination is when a tourist is at their most impressionable state—when the accuracy and quality of digital content is examined by the individual. Though travelers spend time and money across online platforms dreaming, planning, and booking, the experience of travel itself can also be enhanced through digital means. Destination-specific digital platforms can provide access to important information such as attraction hours and accessibility, health and safety protocols, emergency services, currency information, and local customs. Digital content can improve the quality of a visitor's experience and increase their spending in the destination.
5. **Sharing** can be the most influential factor in defining a destination's digital presence. The impressions given to a traveler across all stages

Figure 5: The Five Stages of Travel Planning



of travel planning can be expressed by their own recommendations and endorsements through reviews on each digital platform used in the process or across social media channels. Social media reaches a wide array of audiences and can serve as unpaid marketing for a destination to reach individuals who have never dreamed of visiting the destination before. The ways in which a destination interacts with travelers sharing their experiences on social media not only improves the relationship between destinations and travelers but encourages others to begin the travel planning process as well.

Travelers are accessible across all five stages of travel planning through a robust digital presence that inspires travel, produces confidence in the product, reduces friction in booking, and enables shared experiences.

3.2 Data Drives Performance

Data provide the foundation for insights. Digital platforms provide insights about aggregated online search records, traveler preferences, advertising effectiveness, visitor satisfaction, and tourist mobility tracking. Digital interactions generate data that can be used by businesses and DMOs to improve products and services for travelers and drive future growth.

Developing messages from data involves analyzing the travel data for trends, which will help destinations develop focused messages to travelers. Data analytics interprets existing data into new and productive business models based on real-time consumer

behavior that can be tracked over time. Online search records can offer a real-time perspective on the popularity of various destination features. Traveler polling can help predict where relevant opinions may lie and helps inspire destinations to develop solutions to address those concerns. Through mobility tracking destinations can measure which businesses are seeing shifts in traffic as visitation numbers climb.

Planning action from data brings strategic digital outreach and development to the forefront, where destinations act on knowledge gained about travelers to improve performance. This may translate into the development of additional marketing efforts for new target markets or change the tone of existing messaging to match current sentiment and travel conditions. Encouraging additional digital engagement brings traveler perspectives to the forefront by aggregating what travelers share online and how they encourage others to visit the destination. Marketing strategies can also be adjusted based on digital key performance indicators (KPIs) for owned media (websites), social media, and paid media. Impressions, page views, click throughs, and bookings can all be tracked. This can allow businesses and DMOs to adjust messaging, customer targeting, and platforms in real time to maximize returns on investment.

Digital platforms generate a range of benefits for consumers and businesses



3.3 Digital Impact on the Tourism Economy

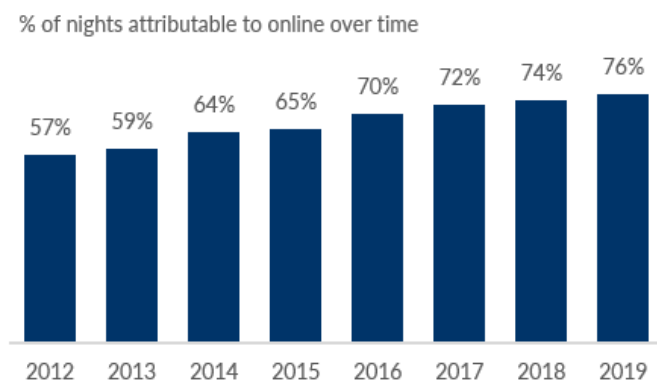
Digital platforms generate benefits for both travelers and businesses. Tourism Economics has modelled the incremental impact of increased use and improvements to digital content and platforms on total overnight stays in Rwanda since 2014.

This analysis primarily focuses on the impact changes in traveler behavior as they use online platforms. It largely does not capture the positive effect on productivity that digitalization can have within tourism-related business and DMOs.

The methodology can be summarised as follows:

- The first step was to determine the number of overnight stays in Rwanda over time (“baseline scenario”)—including both domestic and international travel.
- Next, we calculated the share of travel researched or booked via digital platforms within the historical timeframe.
- We then developed an econometric model to calculate the extent to which increased use of digital platforms and online content impacted the number of overnight stays since 2014 (i.e. how much of the tourism growth was attributable to digital platforms).
- The econometric model results estimated what would have happened to the number of overnight stays if visitors were not able to increase their use of digital platforms and online content to book or research travel (“counterfactual scenario”).
- The difference between the baseline and counterfactual scenario is the additional impact

Figure 6: Digital Travel Footprint in Rwanda



Source: Tourism Economics

supported by increased and improved use of digital platforms and tools.

This analysis was based on a combination of IPK survey data that identifies the search and booking patterns of travelers and Comscore tracking data for travel-related websites, along with data from Tourism Economics’ Global Travel Service (GTS) database.¹⁶

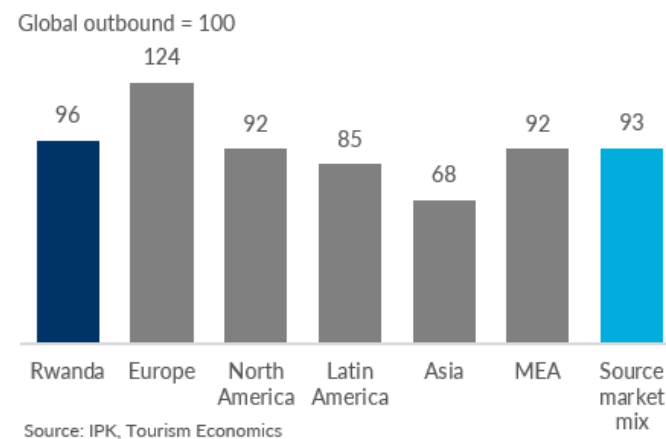
3.4 Use of Digital Content and Online Platforms in Rwanda

The first and second step of the analysis (presented above) indicated that 76% of overnights stays in Rwanda in 2019 were booked or researched via a digital platform, up from 57% of overnight stays in 2012 (Figure 6). Therefore, we can say that 76% of tourism spend, GDP and employment in Rwanda was linked to online research and booking—i.e. most tourism activity in 2019.

The intensity of tourism research online varies by region, as demonstrated in Figure 7, which measures the compared use of various online sites for travel research purposes.¹⁷ Rwanda, when compared to source market regions in 2019, supported a greater intensity of online research than all regions besides Europe, who held a significant lead.

By measuring search and booking patterns of travelers we identified internet platforms where inbound travel to Rwanda was commonly researched or routed from. Overall, 82% of inbound travelers to Rwanda used online platforms to research trips in 2019—equal with internet use for travel among source market regions. Rwanda remains ahead of source markets across online use for tour operators, reviews and Online Travel Agencies (OTAs) (Figure 8). Use of social media (including YouTube) to support

Figure 7: Online Research Intensity Index Against Source Markets, 2019



Source: IPK, Tourism Economics

inbound travel, however, holds the largest difference between Rwanda and source market regions, followed by transport and accommodation websites. Increasing interaction between Rwandan destinations and travelers on these platforms will enable tourism businesses to reach potential travelers throughout all stages of the planning process and remain competitive with source markets.

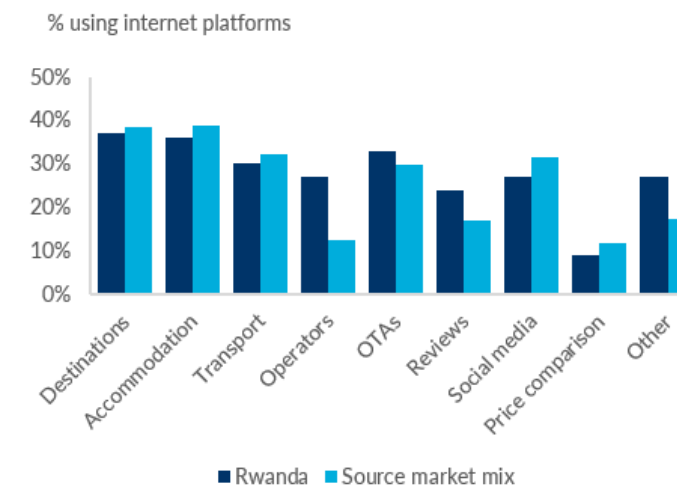
3.5 Analysis on Digital Content's Dynamic Impact on Tourism Growth

Next, we used econometric modelling techniques to determine the extent that increased and improved use of digital platforms had on the number of overnight stays. This analysis confirmed that increasing the use of digital platforms and tools has significantly influenced both domestic and international travel.

We then combined our estimates for the proportion of nights influenced by digital platforms and tools with the results of our econometric analysis to estimate how much lower the total number of overnight stays in Rwanda would have been if the use of digital platforms and tools had not increased and improved since 2014.

The confirmation of the positive influence of increased use of digital platforms and tools is visible in Figure 9. The counterfactual measure of nights holds the 2014 share of nights attributable to online activity equal through 2019, whereas the baseline model depicts the actual digital travel footprint increase during this time (Figure 6). As time continues, the counterfactual measure of nights increasingly slips away from the count of baseline nights. This difference between the

Figure 8: Use of Online Sites for Travel, 2019



Source: IPK, Tourism Economics

*Top source markets for arrivals to Rwanda in 2019 included countries such as the Democratic Republic of the Congo (759,000), Burundi (83,000), Kenya (63,000), Uganda (39,000), and the United States (27,000).

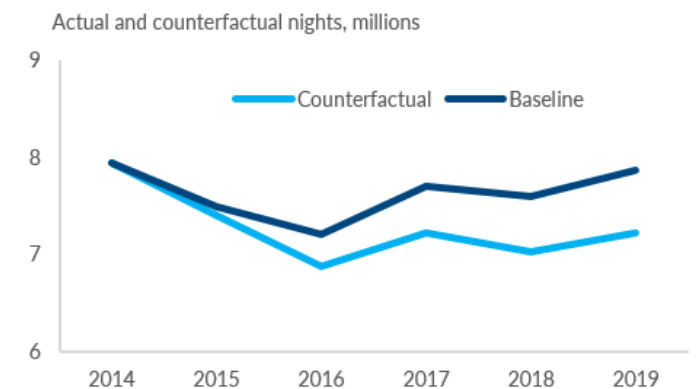
Econometric Modelling Approach

Tourism Economics’ existing global model tracks historic travel flows and produces forecasts based upon fundamental economic drivers of demand. Tourism activity is modelled first by source market and then by destination taking changes in destination market share into account due to competitiveness factors. However, economic drivers do not fully explain all the observed growth over recent years and some trend factors are also included within modelling to cover a range of additional growth factors. This includes the contribution of online platforms to total demand by source market as well as to destination market share.

By including indicators of online tourism activity in estimation of existing equations, the contribution to growth has been identified while accounting for all other growth factors. A series of elasticities was identified which can be applied to measures of online activity; robust coefficients were estimated using econometric techniques with a high degree of confidence. The proportion of the previously unexplained growth attributable to online platforms has been isolated. This analysis proves that use of online platforms has had a notable impact on growth in demand by source market and on destination market share.

baseline and counterfactual scenario is the additional impact of digital platforms and tools over the period. In 2019, nearly 640,000 additional overnight stays in Rwanda were generated as a result of the increase in digital platforms and tools, representing an 8% advantage in 2019 for the baseline model. This confirms that the increased use of digital platforms and tools when booking or researching trips

Figure 9: Number of Overnight Stays in Rwanda



Source: Tourism Economics

* The counterfactual represents the number of overnight stays in Rwanda if use of digital platforms and tools had not increased and improved since 2014.

supported the growth in the actual number of nights booked in Rwanda.

We then calculated the impact these additional nights had on GDP and employment (Figure 10) based on historic relationships. The additional overnight stays resulting from the increased use of digital platforms and tools supported US\$77 million in additional GDP, as well as 25,000 jobs. If the digital footprint of travelers did not increase from 2014 to 2019, the additional impacts would remain at zero. Despite the current realities of tourism, destinations are focused on tourism recovery, which will be driven by the use of digital platforms, online content, and data and analytics.

Figure 10: Net Additional Impact of Digital Platforms in Rwanda, 2019



Source: Tourism Economic

*The additional impact represents the net impact of increased use of digital platforms since 2014.



4 How Digital Content Can Support the Recovery in Travel

Destinations, governments, and businesses affiliated with the tourism industry in Rwanda, and globally, are taking immediate actions to respond to the pandemic and the ensuing challenges. Many DMOs are adding a destination management function to their mandate, leveraging new technologies, and engaging with community stakeholders—all while managing reduced budgets. Despite the current realities of tourism, destinations are focused on tourism recovery, which will be driven by using digital platforms, online content, and data and analytics.

In the previous chapter, we demonstrated the impact of increasing digital platform engagement on travel growth in Rwanda. In this chapter, we explore the opportunity to accelerate a travel recovery with digital transformation and a wider embrace of online platforms. These services can aid the recovery by extending the marketing reach of destinations, providing clear messaging to a global audience to support a transparent and safe return to travel, and informing businesses about the current position and nature of the recovery in travel.

We focus on specific tools and provide an overview of the various content, platforms, and services that DMOs and tourism-related businesses can utilize to accelerate the recovery and conclude with related recommendations.

4.1 Current Position of DMOs

Tourism Economics works with more than 200 destination marketing organizations around the world each year as well as many of the largest

global travel corporations. Our clients in every region are now developing strategic plans to produce a sustainable recovery in travel. The global spread of the coronavirus pandemic has produced a historically challenging environment for DMOs, which often rely on visitors to fund essential operations (i.e. lodging taxes and tourism improvement district generated taxes). With the gradual reopening of cities, regions, and countries, DMOs are now looking to tap into pent-up travel demand through better use of digital platforms and online content. Assuring travelers that destinations are open for business and promoting pandemic safety measures have become the focus of destination marketing.

DMO survey insights

In August 2020, we partnered with NEXTFactor to conduct a survey of nearly 400 DMOs to learn how they are responding to the current crisis. Below are some of the key findings:

- Destination budgets have been severely impacted. Only 11% of respondents believe that next year's budgets will be the same or increase from pre-COVID-19 budgets, while 20% of DMOs expect budgets to decrease more than 50% (Figure 11)
- When asked about the importance of different customer engagement strategies, digital marketing, monitoring data, and digital platform engagement were considered "Extremely Important" by 80%, 65%, and 60% of respondents, respectively (Figure 12)
- When asked about the importance of community collaboration in the use of online platforms and content to reach visitors, 78% of DMOs indicated that community-involved digital strategies are important (Figure 13)

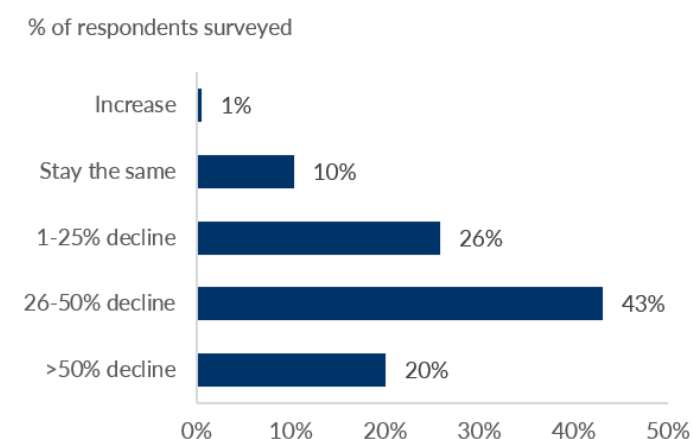
Stakeholder interview insights: global best practices

In addition to conducting industry surveys, we hosted one-on-one discussions with destinations, marketing agencies, and other tourism stakeholders to learn about digital best practices and how destinations and consumers are responding to the pandemic. Findings from the discussion can be summarized into three key themes: DMOs evolving role, adoption of digital platforms, and better use of data analytics.

1. DMOs evolving role

The role of a DMO is shifting from destination marketing to destination marketing and management ("DMMO")—a transition that started prior to the COVID-19 pandemic but has since accelerated given the current state of the tourism industry.

Figure 11: How Does Your Organization's Budget Next Year Compare to Your Pre-COVID-19 Budget?



Source: NextFactor

Previously, DMOs were tasked with marketing the destination to prospective travelers. They developed traditional and digital media campaigns to attract new visitors to the destination, increase visitor spending, and generate additional tax revenue for the destination.

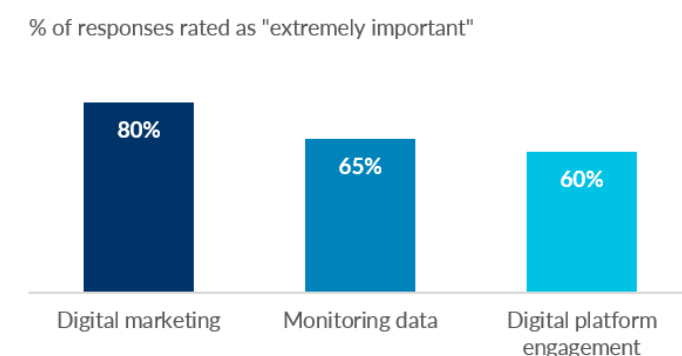
More recently, a DMO's role was expanded beyond marketing to also include destination management, which encompasses broader economic, product development, and strategic initiatives.

To accomplish its enhanced role, DMOs are engaging more frequently with community stakeholders—private businesses, government entities, and residents—to further develop relationships and collaborate on initiatives that will uplift the entire destination. More specifically, DMOs are working with the broader community on the following efforts:

- **Economic development**—creating local assets and opportunities that will foster community growth in terms of developing new jobs and attracting new businesses and residents to the area
- **Destination branding**—developing an authentic brand that portrays the lifestyle and culture of the community
- **Enhancing the digital ecosystem**—educating and assisting local businesses to enhance their digital presence and develop online content that aligns with the destination branding and messaging

In addition to highlighting the importance of community engagement, the pandemic accelerated the need for DMOs to focus on the consumer buying decision process. Specifically, it helped DMOs acknowledge that consumers leverage a variety of digital platforms when selecting a destination to visit. Consumers rely less on DMO recommendations (i.e. listings on the DMO website) and more on consumer

Figure 12: How Important are the Following Customer Engagement Strategies?



Source: NextFactor

DMOs are leveraging more crowdsourced content, which appeals to both locals and outside visitors

recommendations (i.e. reviews on Google, TripAdvisor, Yelp, etc.) when making travel decisions. This concept enticed DMOs to work with private sector businesses to enhance the digital ecosystem for the destination.

DMO marketing priorities also shifted in response to the pandemic. Instead of promoting the destination, DMOs are now providing information about safety measures and protocols. There is a greater emphasis placed on educating the consumers and gaining their trust and confidence. The target markets are also temporarily shifting from domestic and international travelers to local and regional travelers.

It is important for DMOs to focus on mid- and long-term goals, despite the obvious need to generate travel in the short term, which might not always align with the DMO Board of Director's priorities. The goals must consider the entire destination, including those stakeholders outside of the tourism industry.

2. Adoption of Digital Platforms

The pandemic accelerated the adoption of digital platforms and online content. Traditionally, DMOs primarily promoted their destination by exhibiting at trade shows and advertising on TV, billboards, radio, and in magazines. Although effective when used in conjunction with digital marketing, the pandemic highlighted some of the issues associated with traditional marketing platforms (refer to the "Stakeholder interview insights: digital platform benefits" detailed later in this chapter for further insights) and fast-tracked the shift of marketing funding from traditional media to digital platforms.

Although many destinations previously experimented with emerging digital platforms and online content—such as creating video and audio content (i.e. podcasts) or advertising on audio streams and Connected TV—there is increased adoption and a greater comfort level surrounding these technologies, as well as others.

DMOs are also leveraging more crowdsourced content, which appeals to both locals and outside visitors and helps the destination with storytelling. This user-generated content is generally posted on social media and gives consumers an opportunity to learn about the culture and lifestyle of the destination—one of the key roles for a DMO.

Rwandan Tourism Organization Structure

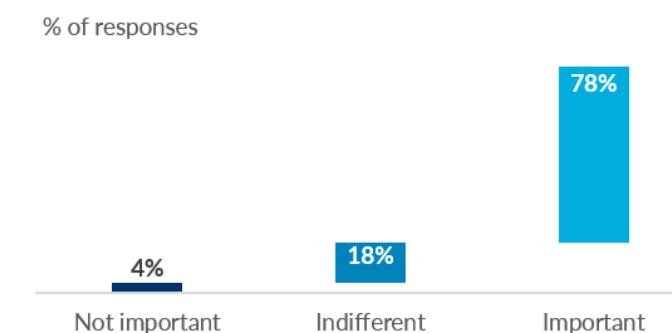
The Rwanda Development Board (RDB) is the government institution mandated to encourage Rwanda's economic development through private sector growth. The institution was formed in 2008 through the merger of eight government institutions—which included Tourism and Conservation—to provide a single government entity responsible for business and investments.

The RDB is under the supervision of the Office of the President and governed by a Board of Directors. It is broken into five main offices, one of which is the Chief Tourism Office.

The Chief Tourism Office (CTO)—led by Belise Kariza—is further segmented into the Tourism Regulation Department and the Tourism & Conservation Department, the latter of which includes a Tourism Promotion Division and a Product Development Division. The CTO, given its role to promote tourism, is the DMO for Rwanda.

Many stakeholders in the tourism industry partner with the RDB including RwandAir, global hotel brands, the Rwanda Safari Guide Association, the Chamber of Tourism Rwanda, the Private Sector Federation, the Rwanda Tours and Travel Association, the World Bank, and others.

Figure 13: How Important is Community Collaboration in the Use of Digital Platforms to Reach Potential Visitors?



Source: NextFactor

Though many DMOs reduced marketing efforts during the pandemic, it provided an opportunity for destinations to assess and enhance their digital ecosystem. DMOs are hosting webinars and one-on-one virtual sessions with local businesses to audit their digital presence and provide guidance on how to enhance digital platforms and online content. These sessions will educate and digitally upskill the local workforce and ultimately develop the digital presence of the destination.

Digital platforms themselves also made updates due to the pandemic. For example, Google My Business, Yelp and TripAdvisor all added new fields that allow businesses to provide information on safety measures, cleaning protocols, and updated hours, in addition to others.

3. Better Use of Data Analytics

Data and analytics continue to become increasingly important to the tourism industry, like many other industries. Data and research serve as the basis for a destination's marketing decisions and helps to answer key questions including:

- How should destinations allocate their marketing budget?
- What digital platforms should be used?
- What images and content should be incorporated in the marketing campaigns?
- What markets and demographics should the destination target?

It is even more critical to conduct research and data analysis during the pandemic given the reduced funding available for marketing and the fact that many consumers are unwilling to travel at this time. Destinations now need to understand the consumers propensity to travel and account for other active travel prospects. Additionally, it is in the best interest of the destination to target travelers that are following COVID-19 safety precautions, which requires an understanding of the current state of COVID-19 in feeder markets.

The current state of the tourism industry places greater scrutiny on budgets, especially as it relates to marketing. Developing a baseline understanding about the visitors' impact on the local community—in terms of taxes, visitor spending, jobs, room nights, or other metrics—is essential. It will help destinations calculate the return generated by marketing campaigns and adjust future campaigns.

Digital platforms have played a critical role in the growth of the tourism industry and will continue to do so. In fact, digital will play a far greater role this year, and in the coming years.

Stakeholder interview insights: digital platform benefits

In addition to providing insights about global best practices for destinations, the stakeholder interviews also helped to identify the benefits of digital platforms.

Digital platforms have played a critical role in the growth of the tourism industry and will continue to do so. In fact, digital tools will play a far greater role this year, and in the coming years, as the tourism industry recovers from the pandemic, given their increasing scalability and agility.

Scalability: Destinations can easily share content and messaging to a large population at a relatively low cost via digital platforms. Although there will always be a cost to produce content, the cost to distribute content has significantly reduced as destinations continue to shift marketing dollars to digital platforms.

Agility: Digital platforms allow destinations to quickly adapt content and messaging for the current environment. For instance, destinations quickly shifted messaging during the pandemic from one that promoted the destinations to focusing on their approach to safety. Traditional media, on the other hand, requires a longer lead time and does not offer this flexibility.

Efficiency: Data and analytics used with digital platforms allows destinations to efficiently target travelers based on active travel prospects and other psychographic considerations. For example, digital marketing concepts, such as paid search, allows destinations to target responsible consumers planning to travel soon.

Geolocation: Smart phone technology enables DMOs to better understand how visitors travel throughout the destination, providing numerous benefits. Through geolocation, destinations can learn about visitor characteristics and preferences, which can be leveraged to support investment decisions.

Geolocation also allows DMOs to target travelers from nearby markets during times when long-haul travel is put on hold and to engage visitors while in market—this can be used to complement traditional

DMOs and tourism-related businesses can use data to help identify movement trends, traveller sentiment, and online queries to aid in marketing their destinations to the ideal audiences

media by understanding where to purchase billboards or other ads.

The use of this technology should follow data privacy regulations. Technology platforms with geolocation capabilities should always ensure the user is aware of this use and that they can decline sharing their data.

Marketing return on investment (ROI): Digital platforms allow destinations to track the effectiveness or ROI of digital marketing campaigns, as well as other key performance indicators and market intelligence, which is especially important during the pandemic due to limited budgets and the need to more accurately target consumers ready to travel. Tracking effectiveness also allows destinations to refine and adjust future campaigns based on the performance of past campaigns.

Brand development: Digital platforms allow destinations to quickly develop authentic brands that can be consistently used across the industry. For example, a country can develop a country-wide brand and marketing campaign that, through digital, can easily and quickly be adopted by regions and local destinations throughout the country. In the past, it took years, even decades, for destinations to organically develop brands since it took longer for locations throughout the country to adopt the brand and messaging.

4.2 How Can Data Help DMOs and Tourism-Related Businesses?

For many destinations, questions remain on the best timing, approach, and new markets for reopening businesses. As highlighted in our consultation findings, DMOs and tourism-related businesses can use data to help identify movement trends, traveler preferences, and online searches to market destinations to the ideal audiences. The demand for travel to return is growing, and so are expectations that destination businesses follow appropriate health and safety measures. Using additional digital content and online platforms to observe the best strategies for destination reopening can foster further levels of trust between destinations and travelers, yielding a stronger and faster recovery. In this section, we set out some practical examples of how data can help DMOs and tourism-related business navigate the recovery.

Understanding what the new normal looks like

Travelers and destinations alike are learning to adapt to travel conditions that are evolving on a day-to-day basis. As a result of the coronavirus pandemic, consumer behavior changed what destination marketing strategies are necessary. These adjustments range from temporary to long-term effects and can be identified through better and more efficient use of data content and platforms.

As a result of the coronavirus pandemic, consumer behavior adjusted in ways that immediately influence what destination marketing strategies are necessary

Key Recommended Actions



Secure DMO Funding



Improve telecom infrastructure



Upgrade and expand digital capabilities and skills



Build a consistent brand message through digital collaboration



Utilize data analytics to support decision making



Continue to tell stories with the extended reach of digital platforms



Adapt to new consumer sensitivities

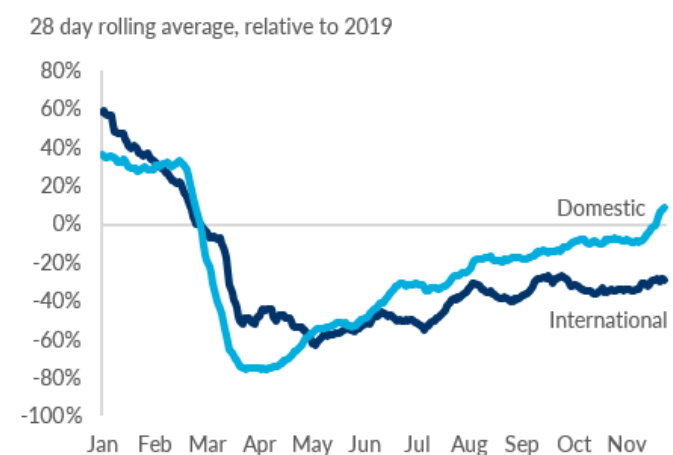
Tracking consumer behavior changes is one way to gauge traveler feeling regarding post-pandemic travel. Demand for additional health and safety measures, no-contact services, and other risk management plans are naturally higher following a global pandemic.

According to a Bloom Consulting survey conducted in April 2020, almost half of respondents who planned to travel for leisure said they may change destinations from what they had planned prior to the COVID-19 pandemic. When asked why, the most common responses were effective public governance and good health infrastructure (53%), followed by less crowds and extensive hygiene (39%).¹⁸ The nature of trips is also shifting, with a consumer preference of shorter haul trips that often remain domestic.

The strategic use of data content and platforms can help understand changes in consumer behavior at the destination level. Observing online flight searches can support the explanation that current travel conditions remain slanted heavily toward domestic and short-haul trips. Consumer interests can also be mapped through analysis of aggregated online searches, for example using Google Trends, to break down how often people look for various modes of travel or trip types, such as “road trips,” “remote destinations,” and “staycations.” Destination-specific health and safety information can be made available to travelers online and resulting web traffic can then be monitored to determine traveler interest and outreach effectiveness.

While the length of these behavioral changes is largely dependent on the state of the global coronavirus pandemic, it can be noted that the

Figure 14: Travel Interest in Rwanda: Flights and Accommodation Queries in 2020



Source: Google travel analytics center

As travel behavior adjusts to new patterns, measuring how temporary or permanent these developments become can be achieved through monitoring the potential use of various modes of transport, such as flights

desire to travel after restrictions is particularly high. Destinations can inform travelers about the safety and preparedness of local businesses to meet consumer expectations. Inspiring travel through curated digital content and messaging will increase the performance of a destination and improve its travel recovery.¹⁹

Analyzing travel behavior shifts

As travel behavior adjusts to new patterns, measuring how temporary or permanent these developments become can be achieved through monitoring the potential use of various modes of transport, such as flights. For example, Google travel data can predict which markets the recovery in Rwanda will come from by demonstrating destination interest through online searches.

Data from the Google travel insights dashboard can assist in predicting the recovery in a multitude of ways.²⁰ Figure 14 presents a rolling average of 28 days of searches for flights and accommodation in Rwanda compared to the same period one year ago.

In early 2020, prior to the pandemic, domestic flight and accommodation searches from within Rwanda increased over the same period one year ago. However, once quarantine measures were implemented in March, domestic flight and accommodation searches decreased by an average of 66% from March 31 to May 4, which is when domestic movement restrictions were first relaxed. Since that time, domestic flight and accommodation searches improved, but were still below prior year levels until December 2020.

From the end of March to early December, international flight and accommodation searches decreased by an average of 41% over the same period one year ago. International flight and accommodation searches started to slowly improve when the Kigali International Airport reopened to commercial passengers August 1, but were still down year-over-year.



4.3 Recommended Actions

Recommendation 1: Secure DMO funding

The Chief Tourism Office (CTO), which is part of the Rwanda Development Board, is responsible for overseeing the tourism industry in Rwanda. The Tourism Promotion Division (TPD) within the CTO is responsible for promoting Rwanda to domestic and international travelers.

As the general role of a DMO shifts from destination marketing to destination marketing and management, it becomes increasingly important for the CTO to secure funding—a difficult task that will only be exacerbated by the pandemic.

Moving forward, DMOs will need to commit a significant amount of resources—both time and money—to accomplish the additional goals associated with destination management, including economic development, destination branding, and enhancing the digital ecosystem.

The CTO should work with the Rwandan government and private sector to ensure current funding is secured and to discuss additional funding options. The CTO will need to articulate how the responsibilities of DMOs have expanded from attracting travelers to making the destination an attractive place to live, work, and visit. Data analytics and research will play a crucial role in effectively communicating this message.

The CTO should explore all potential funding options that can be generated by either the public or private

sector. Funding options may include tourism specific taxes (i.e. lodging taxes, amusement taxes, car rental taxes), general taxes (i.e. sales tax, general fund), private sector support (i.e. membership fees, sponsorships, co-ops), and other innovative solutions, such as tourism improvement districts.

Securing multiple funding sources—some of which are fixed amounts and others that vary based on tourism performance—will ensure that funding does not fall below a certain level in the down years, while allowing the destination to benefit from increased income in the good years.

The CTO can gain insights from funding models of other destinations. The Panamanian Government, for instance, developed the Tourism Promotion Fund, which provides dedicated funding for international tourism promotion. The Tourism Promotion Fund is funded by an international passenger service fee at Tocumen Airport (the international airport of Panama City), private company contributions and donations, and government and state sources.

Other examples include Brand USA and the National Tourism Fund (FONTUR) in Colombia. Brand USA is a public-private partnership responsible for promoting the U.S. to international travelers and is funded by contributions from over 700 partnering organizations that are matched by fees paid by international travelers coming to the U.S. under the Visa Waiver Program. FONTUR manages resources from parafiscal contributions for the promotion of tourism in Colombia. Contributions include transfers from central government funding, tourism-specific taxes,

charges to tourist service providers, donations, funds from sponsorships and commercial activities and revenues from FONTUR-owned tourism assets. Refer to the Annex for additional information.

Although funding will be difficult to obtain during the pandemic, it is a critical investment and priority that will help to accelerate the tourism industry recovery.

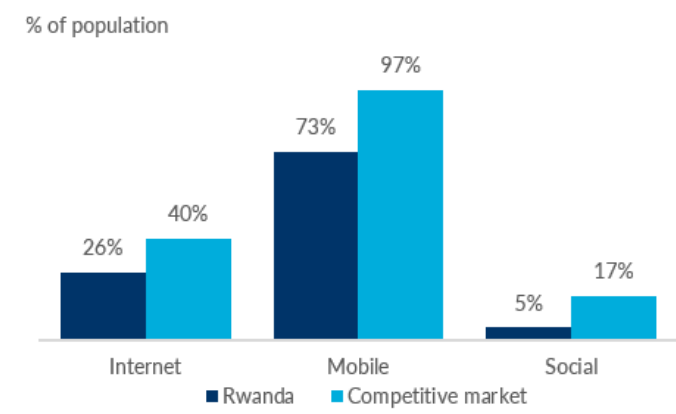
Recommendation 2: Improve telecom infrastructure

Rwanda’s telecom infrastructure—in terms of internet coverage and connection speed—is subpar when compared to other countries in Sub-Saharan Africa (Figures 15 and 16).²¹ Furthermore, the speed of broadband in Rwanda is less developed than some of its source markets in Europe, Asia, and the United States. Like other Sub-Saharan African countries, connection issues still exist in rural parts of the country and broadband costs remain relatively high.

Over the past decade, the Government of Rwanda invested in digital service expansion at rates much faster than neighboring countries. The World Economic Forum’s Network Readiness Index rated Rwanda as the top East African country in promotion of digital transformation through ICT (information and communications technology) investment.²² The government established a new institution in 2017 known as the Rwanda Information Society Authority (RISA), which shares the goal of “digitizing the Rwandan society through an increased usage of ICT as a crosscutting enabler for the development of other sectors.”²³

A few years before RISA was developed, a long-term sectoral plan called SMART Rwanda was established as a master plan for 2015 to 2020, which was intended to “move towards online services, better

Figure 15: Digital Platforms Penetration Ratio



*Competitive market includes Ethiopia, Kenya, Nigeria, Senegal, South Africa, and Tanzania.

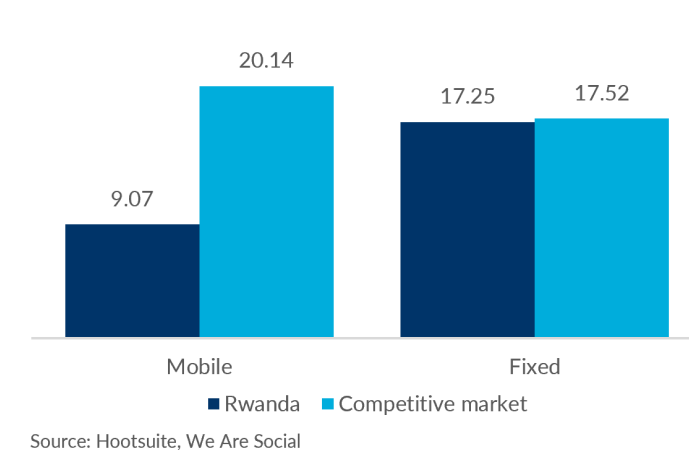
protection of private information, more collaboration between government departments, and a change in public service culture.” Additional goals set by the master plan included a cashless government, ICT contributions amounting to 10% of GDP, and the creation of 100,000 jobs supporting the digital transformation.²⁴

In addition to implementing various legislation to support the expansion of digital services, Rwanda further developed its global telecom infrastructure. Currently, the country is connected to the global telecom infrastructure through terrestrial cables, which link to submarine cables located in Kenya and Tanzania. A national fiber optic network helped distribute the connectivity, which has kept the speed of its fixed internet connection competitive with other markets.

Broadband penetration remains less of an issue across the country than the overall speed of the current network coverage. The cost of broadband, especially mobile broadband, is another issue that needs to be addressed. Although costs are among the lowest in Sub-Saharan Africa, it remains difficult for average income earners in Rwanda to afford.

The cost of smartphones in Rwanda has limited the use of broadband services. This is a known issue, however, and one that is being addressed. For example, the Rwandan government has tried to increase the number of smartphones manufactured locally to reduce costs, and recently launched a domestic smartphone production line linked to the Mara Group. Even with these improvements, there has not been a significant increase in access; an issue that disproportionately affects rural households since they own mobile phones at a lesser rate than urban areas.

Figure 16: Average Internet Connection Speed



Limited broadband coverage in rural areas is not unique to Rwanda as it remains an issue for many countries in Africa and around the world. There are examples, however, of countries that are addressing the problem, which Rwanda should consider. For example, the postal authority in Senegal recently entered into an agreement with a satellite communication service provider to improve the broadband access across rural areas in Senegal. Refer to the Annex for additional information.

Despite recent efforts, there is still more that needs to be done to further the digital economy in Rwanda. The private sector should continue to work alongside the government to ensure that goals of the SMART Rwanda master plan and RISA remain a focus.

Recommendation 3: Upgrade and expand digital capabilities and skills

The CTO should allocate time to educate local businesses about digital best practices and provide assistance where needed. Generally, DMOs focused on improving the destination’s digital ecosystem found it effective to help private sector businesses fix specific digital problems, such as updating websites, ensuring Google search information is complete, uploading new pictures, enabling digital transactions, and responding to reviews.

To improve digital skills, the CTO can create roadshows, webinars, and other educational materials to help local businesses assess their digital presence

across various platforms. This will allow businesses to identify ways to enhance their digital presence and prioritize the list so they can focus on quick fixes first.

The CTO can also promote courses that seek to improve the digital skills of residents and businesses, such as the Digital Skills for Africa program offered by Google. Nigeria is an example of a country that heavily utilized this program, with more than 450,000 residents and businesses participating in 2016 and 2017. Refer to the Annex for additional information.

In addition to working with tourism businesses directly, the CTO should work with local universities, global tourism companies, and digital organizations to develop courses and training opportunities intended to digitally upskill the employees and SMEs within the local tourism sector. The Rwandan government has already partnered with private companies such as Andela to offer private sector training in digital skills. A government-sponsored effort called the “Rwanda Coding Academy” was also supported to target technical and vocational institutions.

It will also be critical to develop educational opportunities that help Rwandans build digital skills. In 2017, Rwanda launched the Digital Ambassadors Program (DAP), along with the Digital Opportunities Trust. These programs seek to improve skills training for around 5 million people in Rwanda.

Rwanda’s public education system lacks resources and infrastructure, which prevents students from

learning digital skills. The Rwandan Government is pursuing a national competency-based curriculum (CBC), investing in helping young learners with basic computer navigation and building courses in programming and database management for secondary level students. However, access to devices remains a challenge. As of 2017, only 44% of primary schools and 60% of secondary schools had access to ICT for learning purposes. Ensuring that children and young adults learn about digital technologies will prepare them for a digital and globalized world when they enter the workforce, which will help the future tourism industry as well as all other industries.

Enhancing the digital presence of private sector businesses, employees, and the Rwandan youth will uplift the destination's digital ecosystem and make it more attractive to prospective travelers.

Recommendation 4: Build a consistent brand message through digital collaboration

The CTO, other public organizations, and the private sector must align marketing messaging and tactics. This should include enhancing relationships between government entities and local businesses to develop a common vision and collective strategy for the destination.

The CTO can lead this process by supporting the integration of travel partner audience segments (e.g. Travelstart, RwandAir, Viruna Lodge, Kigali Serena Hotel, Sabyinyo Silverback Lodge, Volcanoes National Park, Nyungwe Forest National Park, etc.) and by developing a content strategy framework for messaging across all channels of communication.

Digital tools, especially social media, can support this with common media platforms, branding, messaging, and an integrated strategy. This will allow for cooperative marketing and shared content to present a brand message that is consistent and powerful.

Establishing strong relationships throughout the travel and tourism industry is even more vital during difficult times. In the current environment, it is important for all local stakeholders to have consistent messaging about safety measures and protocols currently enforced within the destination.

In addition to building relationships with local tourism stakeholders, destinations need to develop strategic relationships, as appropriate, with tourism suppliers worldwide (i.e. marketing agencies, data companies, OTAs, etc.) to help form and share the brand message.

Recommendation 5: Utilize data analytics to support decision making

The CTO and destinations around the world are increasingly understanding the importance of data (especially during a pandemic) and the benefits it can provide when making strategic and marketing decisions.

According to the OECD, "... the crisis has highlighted shortcomings in the availability of timely, comparable, granular data in quickly evolving situations. Reliable and consistent indicators are needed to evaluate the effectiveness of programs and initiatives, and monitor progress on tourism recovery and resilience."²⁵

In terms of strategic decisions, data analytics can help secure tourism funding by establishing a baseline understanding about the visitor's impact on the local community. It can also help determine how to allocate the budget among competing priorities.

Data analytics plays a key role in marketing, especially as a larger portion of destination marketing shifts from traditional media to digital media. Aggregated and anonymized data from digital platforms on consumer preferences and demographics helps destinations determine target consumer groups, the most effective platforms to engage with those groups, and the appropriate message and content to best connect with various consumers segments.

Given the importance of data analytics and the impact it can have on tourism recovery, the CTO should work with mobile operators, tech companies, and local tourism businesses to obtain aggregated data on key indicators (e.g. number of visits, flight availability etc.) and insights (e.g. barriers to travel, misconceptions) for current and potential travel source markets for Rwanda. These data can help prioritize source markets and develop customized marketing strategies for various consumer segments. Anonymized audience and insights-driven content can also help further tailor the marketing content for each stage of the travel journey within these markets. Aggregated and anonymized data can also be used to develop and monitor KPIs, linking campaign and initiative objectives with business outcomes, and can include metrics like destination visits, hotel occupancy, revenue per tourist etc. These types of

Careful inclusion of digital best practices can position a destination to pursue strategies enabled by the increased use of digital content and platforms



analysis can also be carried out on an incremental basis, which can be important for determining the scale of future marketing campaigns. Tech companies and consultants are positioned to support DMOs in creating a data ecosystem with the key stakeholders of a destination. The CTO should explore whether this support could help with other ways to apply data analytics.

The CTO should also consider how other destinations are using data analytics. For example, South African Tourism—the national tourism organization tasked with promoting tourism to South Africa—developed a series of tourism dashboards that easily allow the organization and other tourism stakeholders to leverage data and insights for smarter decision making. Refer to the Annex for additional information.

Public bodies can play a leading role in encouraging the use of data analytics in tourism SMEs in Rwanda, through the development of targeted initiatives to support the integration of these technologies and promote a digital outlook. Initiatives can range from one-on-one mentoring programs and outreach events to the development of travel-tech incubators and accelerators, to funding and incentive programs.

For the Government of Rwanda to do this effectively, they must continue to develop their understanding of the needs of domestic tourism businesses trying to engage in digital transformation and what barriers more traditional tourism businesses face to adopt digital technologies—beyond developing necessary skills.²⁶

Recommendation 6: Continue to tell stories with the extended reach of digital platforms

Travelers are still dreaming and ready to travel when it is safe. DMOs in Rwanda should aim to facilitate the dreaming stage of travelers from domestic and regional markets (Sub-Saharan Africa) while safety concerns and travel restrictions are in place. Digital platforms are uniquely able to keep Rwanda a preeminent destination, especially via social media which can connect with consumers in an authentic and cost-effective manner.

During the pandemic, many destinations transitioned marketing efforts toward supporting travel dreams while travel restrictions remained in place. For example, the Kenya Tourism Board built upon its MagicalKenya campaign with #MagicAwaits to help keep Kenya appealing to future travelers during the pandemic. Refer to the Annex for additional information.

Rwanda, like other countries, also marketed to domestic travelers during the pandemic and provided special offers to those travelers for activities such as luxury tours and group day tours.²⁷ However, promoting to domestic travelers has been a priority for the RDB and CTO for many years.

In 2016, the CTO launched a campaign called "Tembera u Rwanda," meaning, "Explore Rwanda." Belise Kariza, Chief Tourism Officer with RDB, described the campaign, "Rwanda is one of the most acclaimed destinations in Africa and it should be appreciated by its residents. With reduced rates for Rwandans and road access to every tourism

Building trust and confidence in consumers is critical in the current environment

destination, we invite Rwandans to bear witness to the remarkable experience we sell to the international market.”²⁸

Recommendation 7: Adapt to new consumer sensitivities

Consumer traveler behavior transformed due to the pandemic and will likely continue to do so even as a new normal is established. Destinations must account for these new behaviors in their marketing strategy, potentially targeting new markets and accounting for additional consumer demographics and psychographics.

Building consumer trust and confidence is critical in the current environment. Stakeholder interviews suggest that consumers have a greater tendency to trust marketing conducted by official organizations, which gives the CTO an advantage, but also an increased responsibility to consistently develop (and fund) marketing campaigns and other messaging during both the up and down times. It also means that the CTO needs to provide high-quality and accurate information on current conditions, and not just try to sell the destination.

The CTO must continue to inform prospective travelers about the health and safety protocols in the destination, which helps to establish trust. As the CTO builds its reputation as a source of quality information, trust and confidence from potential visitors will generate travel demand once conditions are appropriate.

Rwanda should follow best practices and adjust digital content in order to maintain engagement with travelers. Events that normally would be held in person can be transitioned to an online format, including concerts, shows, competitions, and games. For example, many artists are now offering streaming performances instead of in-person concerts.

The travel downturn presents an opportunity to develop fun and engaging content that promotes the culture, history, and views of Rwanda. Some destinations have developed classes on local cuisine, music, or dance, while others offered virtual yoga classes at a scenic location or in front of a famous attraction. In addition to video content, some destinations developed games, puzzles, and other activities to interact with consumers.²⁹

4.4 The Future of Digitization in the Tourism Sector

When businesses adapt existing digital processes to best fit the environment of the recovery and future of the tourism industry, they bring additional productivity into their work that sees ripple effects across the economy. These digital investments encourage destinations to become more creative and competitive at attracting traveler demand, while simultaneously improving their own business practices.

Careful inclusion of digital best practices can position a destination to pursue strategies enabled by the increased use of digital content and platforms. Providing an up-to-date business model can stabilize the working environment while encouraging a smarter, more innovative approach to tourism. For example, the internal use of cloud computing creates a transferrable environment for destinations that can then be managed from anywhere with a reliable internet access. The external implementation of technologies such as artificial intelligence (AI) can assist travelers exploring or booking from destination websites through the use of chat bots. This expansion can provide a valuable source of data to destinations to measure how individuals interact with their website. In addition, collecting user-generated content from social media platforms can create a record of the image a destination has built among its travelers. All of these practices can contribute to the development of effective campaigns using insights gained from expanding the collection of traveler data content. As destinations understand their travelers more through efficient data collection and monitoring, the relationship between tourism businesses and consumers can flourish.^{30 31}



5 Travel Outlook

This chapter examines the outlook for tourism in Rwanda under two scenarios. This includes a baseline outlook as well as an alternative “opportunity outlook” that incorporates the benefits of the combined recommendations highlighted above.

5.1 Baseline Outlook

Recovery at the global level will largely hinge on widespread control of the coronavirus pandemic, which continues to permeate and resurge in many countries.

Supporting domestic and short-haul travel remains critical for near-term recovery. This includes ensuring that remote destinations are prepared to host visitor segments less interested in cities. Tourism is additionally being revitalized through the renewed movement of international travelers between countries where pandemic spread has become less intense.

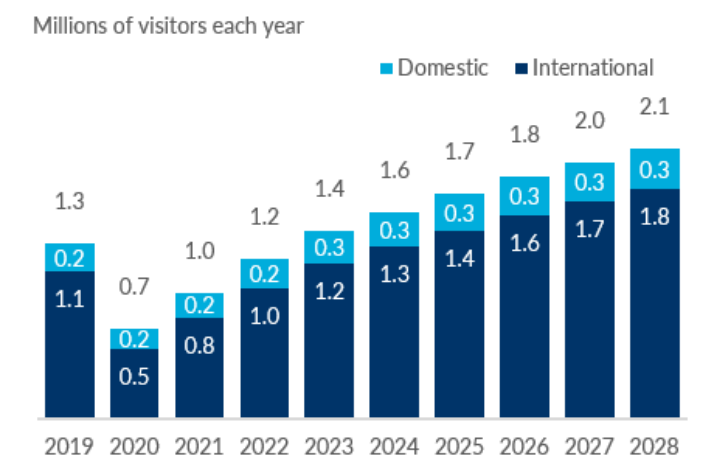
Overnight visits to Rwanda are set to reach 2019 levels by 2023, reaching a total of 1.7 million visits by 2025.³²

This recovery will be supported by growth in domestic tourism, which should surpass 2019 levels by 2022. Near-term shifts to domestic and short-haul travel mean that domestic visitors will comprise a larger total share than in 2019 and account for 20% of total overnight visits to Rwanda in 2021. By 2025, the domestic share of overnight visits will level out at 16%, equal to its share in 2019. International visits are also expected to grow from the depressed levels in 2020 but will not reach 2019 levels until 2023.

The recovery in travel and tourism’s total contribution to GDP will accelerate into 2021 but remain below pre-coronavirus levels until 2024.

Travel and tourism’s GDP contribution is expected to grow nearly 20% in 2021, reaching a total of US\$700 million. This value-added contribution for 2021 is 66% of the 2019 levels. GDP contributions of travel and tourism to the Rwandan economy will reach US\$1.5 billion by 2026.

Figure 17: Overnight Visits to Rwanda Over the Forecast Period



Source: Tourism Economics

Total employment as a result of travel and tourism to Rwanda will remain below 2019 levels through 2025, supporting over 400,000 jobs in 2028.

Most employment gains will occur during 2021 and 2022 following the rebound in visits, overnights and spending. A slower pace of growth is then likely in each year to 2028, closer to longer-run trends. The number of jobs created per US\$1 million of travel and tourism GDP will be nearly 30% lower in 2028 than in 2019, but the sector will remain important for job creation. Travel and tourism will support one in every 11 jobs in the Rwandan economy.

5.2 Opportunity Outlook

The recovery profile of both inbound and domestic visitors varies significantly under alternative scenarios. Uncertainties surrounding these forecasts in part involve the degree at which the coronavirus pandemic continues to impact global travel.

For example, wide vaccine distribution in 2021 and effective immunity against infection and transmission would allow current restrictions to be eased faster, facilitating a rapid recovery and limiting permanent damage on the global economy. This would drive a quicker return to 2019 peaks. However, if infections continue to rise and the distribution of vaccines are delayed (and/or effectiveness is less than anticipated), downside risks will become more likely. With the resurgence of travel restrictions in areas where infection rates began to spike again, forecasts for recovery can become increasingly volatile.

The recovery also depends on what actions governments, businesses, and individuals take in response to the crisis.

Increasing control of the coronavirus pandemic will aid the travel and tourism industry's recovery and support a quicker return to previous levels of visitation. However, depressed traveler sentiment and slower economic growth can create drags on the sector's recovery even after travel restrictions have been lifted. Additionally, there may also be potential supply constraints, reflected in the closure of many providers as a result of the crisis.

DMOs, tourism-related businesses and other travel industry stakeholders and policymakers can all play a role in mitigating these problems and supporting new growth.

Proactive steps include investment in travel infrastructure such as airports and local transportation, a review of tax policies and investment incentives to facilitate private sector investment in travel and tourism enterprises, and action to mitigating traveler risk aversion.

Better use of data and digital content and platforms will also be key in supporting the tourism recovery.

The private sector should continue to work alongside the government to ensure that the goals established by the Rwanda Information Society Authority (RISA) and in SMART Rwanda are achieved. This would in turn support growing comfort with digital platforms to residents and encourage businesses to increase their use of digital platforms.

Modelling of the contribution of digital content to travel growth in section 3.5 has been extended to estimate an opportunity outlook which considers an increased use of digital tools by travelers for planning along with the associated uplift in activity implied by historic trends

Enhancing the digital presence of private sector businesses will advance the destination's digital ecosystem and make it more attractive to prospective travelers. This particularly applies to firms within Rwanda's Gorilla tourism, which is a central part of the tourism economy. International tourist visits typically come through tourist booking with outgoing tour operators. Thus, for Rwandan firms, long-term cooperation with those outgoing operators has been essential. Firms have often pushed toward distribution of tour resources and direct marketing to customers, but lack the time and skill needed, which often leads to minimal adoption. Outbound tour firms closer to customers are more likely to receive customers than Rwandan firms.³³

Modelling the contribution of digital content to travel growth in section 3.5 has been extended for the forecast period. A baseline outlook considers a constant use of digital platforms for travel planning over the next five years. An opportunity outlook considers an increased use of digital tools by travelers for planning. This is facilitated by tourism service providers investing to meet any historic shortfall and match the increased demand for information and digital services. The associated boost in activity implied by historic trends and increased user and provider interactions has been calculated.

The proportion of travel to Rwanda organized online has increased in recent years, but we estimate that preferences in major source markets have risen faster. Travelers from major source markets are now, on average, 4% more likely to research or book travel online compared with those within Rwanda. There remains some opportunity to move ahead with preferences among travelers. For example, IPK data show that the proportion of travelers to Rwanda relying on tour operators, reviews and OTAs exceeds the average for all Sub-Saharan Africa demand, while the proportion using accommodation websites and social media is lower. There is a further opportunity to embrace best practices and drive additional travel activity through digital transformation across destination organizations and tourism businesses. Allocating time to educate local businesses about digital best practices and providing opportunities to digitally upskill local tourism sector employees will enhance the digital ecosystem and increase the competitive edge of Rwanda's tourism economy.

Under an alternative "opportunity outlook" that incorporates some of the combined benefits of the recommendations for Rwanda, we anticipate an even greater increase in the adoption and use of digital platforms.

Under this scenario, the use of digital platforms would increase to match source market preferences and any higher use for benchmark competitor destinations. Based on the historic estimated relationship between digital use and travel activity a higher opportunity outlook has been quantified. Growth would exceed the baseline projections with a cumulative increase in tourism spending of US\$117 million over the next five years. This would create an additional 10,000 new jobs by 2025. However, as noted in chapter 3,

Figure 18: Contribution of Travel & Tourism to Rwanda's Economy

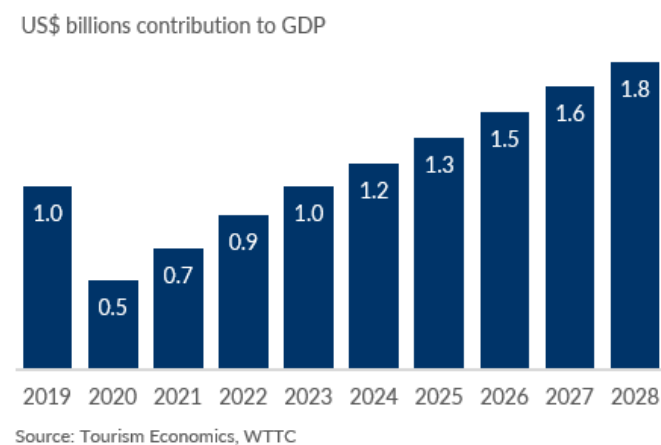


Figure 19: Contribution of Travel & Tourism to Rwanda's Employment

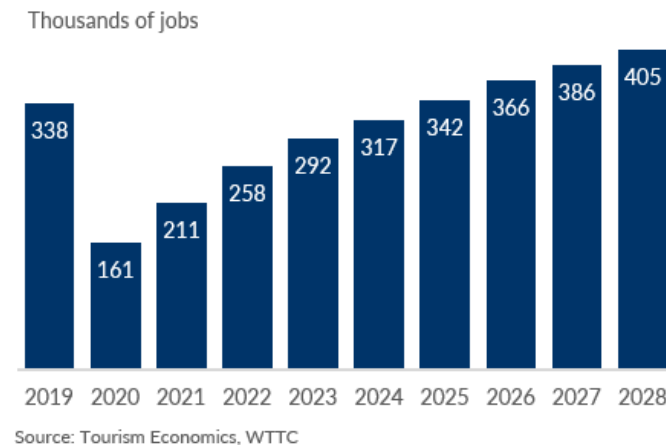


Figure 20: Digital Travel Footprint in Rwanda

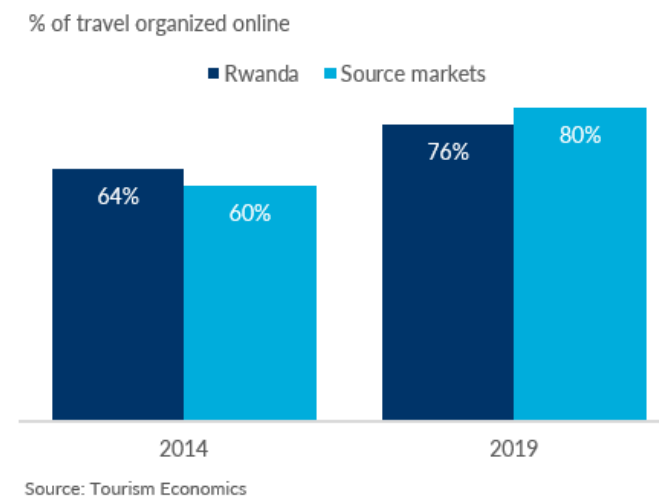
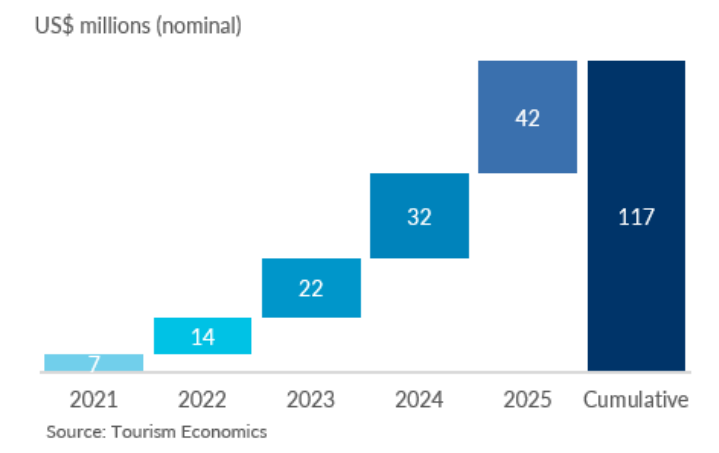


Figure 21: Opportunity for Higher Tourism Spending in Rwanda, 2021 to 2025



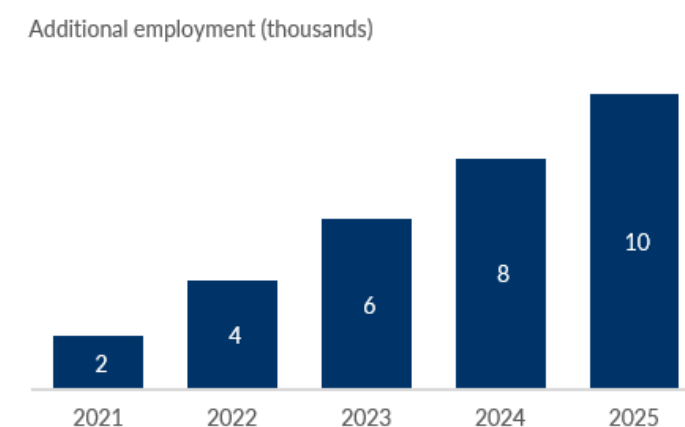
*Above baseline additional spending attributable to improve online activity.

these assessments may underestimate the full impacts when considering the additional advantages that can be realized through gains to productivity across the Rwandan economy.

Figure 23 summarizes the baseline outlook and the potential opportunity scenario for the travel and tourism industry in Rwanda. Our baseline outlook depicts the expected recovery from the coronavirus pandemic, including some continued online interactions based on the past level of digital activity.

The upside scenario illustrates the potential opportunity from the combined recommendations highlighted in chapter 4. By increasing digital interactions, Rwanda will be able to fully catch up with traveler preferences from all major source markets. Increasing these interactions through channels like social media will allow Rwanda to remain competitive with source market regions in online travel research and encourage future market share gains. Destination organizations and tourism business in Rwanda can increase platform use across accommodations, transport and social media to increase online interaction with potential travelers throughout all stages of the planning process. Gains were projected based on the historic estimated relationship between digital interactions and tourism sector performance, taking all other drivers of destination and source market demand into account.

Figure 22: Opportunity for Higher Employment in Rwanda, 2021 to 2025



Source: Tourism Economics

*Potential additional employment above baseline attributable to improved online presence.

A clear opportunity exists to invest in the expansion of digital efforts that bring destinations closer to travelers and reach a larger audience of both domestic and international tourists. Key actions to meet increasing traveler use of digital tools and maximize the opportunity outlook include:

- Securing DMO funding from multiple sources in the public and private sector
- Improving internet infrastructure and speeds across Rwanda to meet the goals established by the Rwanda Information Society Authority (RISA) and SMART Rwanda

- Upgrading and expanding digital capabilities and skills among tourism SMEs
- Building a consistent brand with key tourism stakeholders through digital collaboration
- Utilizing data analytics to support decision making in the Chief Tourism Office (CTO) and tourism businesses
- Supporting travel dreaming with digital storytelling in key source markets
- Adapting Rwanda’s tourism offer to new consumer preference and sensitives

These actions will support a strong tourism recovery in Rwanda and the long-term health of the industry, by establishing a tourism market that is larger, more diverse, and faster growing.

Figure 23: Baseline Outlook and Potential Growth Attributable to Higher Online Presence for Rwanda

		2021	2022	2023	2024	2025
Nights (millions)	Baseline	5.8	7.6	9.2	10.3	11.3
	Opportunity Outlook	5.8	7.7	9.4	10.6	11.7
	Potential Increase	0.1	0.1	0.2	0.3	0.4
Spend (US\$ millions)	Baseline	570	700	810	900	1,000
	Opportunity Outlook	577	714	832	832	1,042
	Potential Increase	7	14	22	32	42
GDP (US\$ millions)	Baseline	690	880	1,040	1,170	1,320
	Opportunity Outlook	697	895	1,064	1,205	1,366
	Potential Increase	7	15	24	35	46
Jobs (thousands)	Baseline	211	258	292	317	342
	Opportunity Outlook	213	261	298	324	352
	Potential Increase	2	4	6	8	10

6 Annex

This annex includes case studies of the recommendations made in this report. Some of these are from competitor countries in the same region, while others are global examples.

6.1 Case Study: Secure DMO Funding

Panama – In 2017, the Panamanian Government created the Tourism Promotion Fund, which provides dedicated funding for international tourism promotion. PROMTUR, which also was developed in 2017 (commenced operations in 2019), is the public-private destination marketing organization responsible for promoting Panama internationally. The Tourism Promotion Fund is funded by an international passenger service fee at Tocumen Airport, private company contributions and donations, and government and state sources.

Colombia – In 1996, the Colombian Government created the Tourism Promotion Fund to manage resources generated by parafiscal taxes for tourism promotion, which must follow the tourism policy guidelines set forth by the Ministry of Commerce, Industry and Tourism.

The fund taxed businesses that participated in the tourism industry, which included:

- Accommodation providers
- Travel agencies and companies devoted to tourist sporting activities
- Vehicle rental companies and specialist land transport providers
- Spas and wellness centers
- Theme parks
- Tourist bars and restaurants
- Passenger transport providers
- Timeshare projects
- Convention centers

In 2012, the Tourism Promotion Fund changed its name to the National Tourism Fund (FONTUR) and expanded its scope. In addition to providing funding for tourism promotion, it also managed and sold real estate, and entered into concession agreements, lease agreements, loan-for-use agreements, hotel management agreements, or any other contract used for tourism exploration purposes.

United States – The Travel Promotion Act of 2009 established Brand USA, which is a public-private partnership responsible for promoting the U.S. to international travelers. Brand USA is funded by contributions from over 700 partnering organizations that are matched by fees paid by international travelers that come to the U.S. under the Visa Waiver Program.

6.2 Case Studies: Improve Telecom Infrastructure

Senegal – In February 2014, the Government of Senegal passed the Plan Senegal Emergent (PSE), which is a policy framework aimed at getting Senegal on the road to development by 2035. The PSE made the ICT sector a prominent priority as a core enabler for the broader digital economy.

A few years after the PSE was developed, a long-term sectoral plan called the Digital Senegal 2025 Strategy was established “to breathe new life into the sector by providing stakeholders with new growth drivers and sources, by raising the contribution of digital technologies to GDP by 10 percent, and by creating 35,000 direct jobs by 2025.”

Broadband coverage remains an issue across Senegal with a significant gap between the coverage provided in urban and rural areas. This is a known issue, however, and one that is being addressed. In November 2020, Senegal’s postal authority signed an agreement with Spacecom, a satellite communication service provider, that will provide the postal authority “with over double its current capacity, which will not only serve its 200 remote post offices but will also give the country’s rural population access to internet services.”

6.3 Case Study: Upgrade and Expand Digital Capabilities and Skills

Nigeria – Google launched the Digital Skills for Africa program in 2016 to help individuals and businesses in Africa enhance their digital skills and succeed online. The program provided free online courses, tools, and in-person digital training to educators, jobs seekers, and businesses.

Nigerian residents and businesses heavily utilized the program, with more than 450,000 Nigerians participating in 2016 and 2017 out of a total target of 1 million for the entire continent. Given its success, Google extended the program in 2017 for an additional five years and set an updated target of training 10 million people. Nigerians maintained their strong participation as the program expanded into additional locations, including Aba and other local communities in the Abia State in 2019.

6.4 Case Study: Utilize Data Analytics to Support Decision Making

South Africa – South African Tourism—the national tourism organization tasked with promoting tourism to South Africa—is a tourism entity that leverages data and insights to aid smarter decision making in the tourism planning sector. In 2018, the Strategy, Insights & Analytics arm of South African Tourism created a series of dashboards that allow users to easily visualize key performance indicators and filter them on demand to gain insights into the organization’s business performance.

The dashboards include the following information, available for viewing by the public:

- Arrivals
- Key tourist measures
- Domestic arrivals
- Provincial tourist arrivals

6.5 Case Studies: Continue to Tell Stories with the Extended Reach of Digital Platforms

Kenya – The Kenya Tourism Board built upon its MagicalKenya campaign with #MagicAwaits to help keep Kenya appealing to future travelers during the pandemic. As part of the campaign, there was a virtual Safari live stream that showcased the game safaris in some of the parks and reserves across the country. It also highlighted the various health and safety protocols adopted in the parks and facilities to ensure that visitors remain safe.

Endnotes

- 1 Note: All historic GDP and employment impact figures cited from World Travel & Tourism Council. Data for historic visits, nights and spend are from Tourism Economics databases. All forecasts are produced by Tourism Economics.
- 2 Tourism Economics — Global Travel Service (GTS).
- 3 Forecasts from Tourism Economics.
- 4 OECD, Preparing tourism businesses for the digital future, 2020.
- 5 OECD, Preparing tourism businesses for the digital future, 2020.
- 6 Note: All historic GDP and employment impact figures cited from World Travel & Tourism Council. All forecasts produced by Tourism Economics.
- 7 Tourism Economics — Global Travel Service (GTS).
- 8 Reuters, Rwanda confirms first case of coronavirus – health ministry, March 14, 2020.
- 9 Deutsche Welle, Coronavirus: Rwanda imposes Africa’s first lockdown, March 22, 2020.
- 10 GDP and unemployment forecasts were sourced from Oxford Economics’ Global Economic Model. This is a globally integrated economic model, covering over 80 countries, which provides consistent country levels forecasts for a wide range of metrics. Where available, this model draws on data published by national statistics bodies. GTS and GCT travel and tourism forecasts are consistent with this model.
- 11 Visit Rwanda, Rwanda Reopens, June 2020.
- 12 Total visitor spend estimates do not include spending on inbound transportation. However, revenues from inbound transportation are included in our assessment of direct travel and tourism GDP, presented below.
- 13 The New Times, Rwanda offers rich potential for tourism investment: PM, October 12, 2017.
- 14 Definitions presented in the blue box located at the end of section 2.3 were sourced from UNWTO glossary of tourism terms web page.
- 15 Tourism Economics, Data & Digital Platforms: Driving Tourism Growth in Asia Pacific, 2020.
- 16 IPK international conducts an annual survey monitoring global outbound travel demand. This survey provides select measures of travel online search behavior and booking patterns, as well as demographic details.
- 17 The index measures the ratio of digital platforms for travel planning relative to all information sources used in planning. There is considerable overlap in sources used for travel planning as both offline and traditional offline sources can be used. This index captures the extent to which online platforms are exclusively used. For example, if online platforms are used to the same extent for travel to both country A and country B, but offline platforms are less frequently used for travel to country A then there will be a higher intensity index score.
- 18 Bloom Consulting, COVID-19: The Impact on Tourist Behaviours, June 17, 2020.
- 19 Boston Consulting Group & Google, Actions for Destination Marketers to Navigate in a COVID-19 World, 2020.
- 20 Travel Insights with Google.
- 21 The competitive market includes a selection of comparable emerging markets from the same region as Rwanda.
- 22 The World Bank, Rwanda Economic Update: Leveraging Digital Transformation for Sustainable Growth, January 28, 2020.
- 23 RISA, About RISA, 2017.
- 24 Republic of Rwanda, SMART Rwanda Master Plan, 2015.
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- 26 OECD, Preparing tourism businesses for the digital future, 2020.
- 27 Visit Rwanda, Tembera U Rwanda Special Offers, December 2020.
- 28 The New Times, ‘Tembera u Rwanda’: Exploring Rwanda’s tourist attractions, December 3, 2017.
- 29 Boston Consulting Group & Google, Actions for Destination Marketers to Navigate in a COVID-19 World, 2020.
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- 31 World Economic Forum, Digital Transformation Initiative: Aviation, Travel and Tourism Industry, 2017.
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- 33 Oxford Internet Institute, Foster and Graham, The Internet and Tourism in Rwanda, 2014.



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