

# Rwanda Economy Digitalisation Programme

Tourism sector policy scoping project

April 2023



# Background

The purpose of the deck is to provide an overview of the tourism sector in Rwanda. The deck focuses on the priorities of the policymaker – Ministry of Trade and Industry – and which data sources are available to inform policymaking.

The research was based on data that is publicly available.

This research forms part of the work conducted under the Rwanda Economy Digitalisation Programme, in partnership with the Ministry of ICT and Innovation and the Mastercard Foundation.



# Outline



Rwanda Tourism Context



Overview of the tourism VC in Rwanda



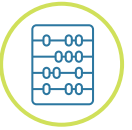
Relevant policy landscape and objectives to pursue



Key data sets identified so far



Data-mapping to inform key tourism objectives and opportunities



Potential methodologies for data analysis



Key take-aways and questions



# Introduction

## Purpose of this analysis

- The Rwanda Economy Digitalisation Programme (REDP) is a three-year initiative to support a sustained shift to an inclusive, digitalised economy.
- Together with the MINICT, the programme focuses on four key sectors: Agriculture, Retail Trade, Tourism and Education.
- This project aims to carry out a landscaping assessment to evaluate the key opportunities within the tourism sector towards the MINICT overall objective to identify how data can be better used to inform and evaluate policy priorities to enhance the development and digitalisation of the sector.

## Key study objectives:

- Identify the primary policy objectives for the tourism sector, and specifically in terms of payment digitalisation as well as economic digitalisation, more broadly.
- Identify opportunities for tourism sector development and digitalisation
- Establish which sector-specific datasets are available to inform policymaking design and impact measurement
- Understand how the analysis of available and potential datasets could inform policy priorities, as well as relevant impact indicators, for digitalisation within the tourism sector.





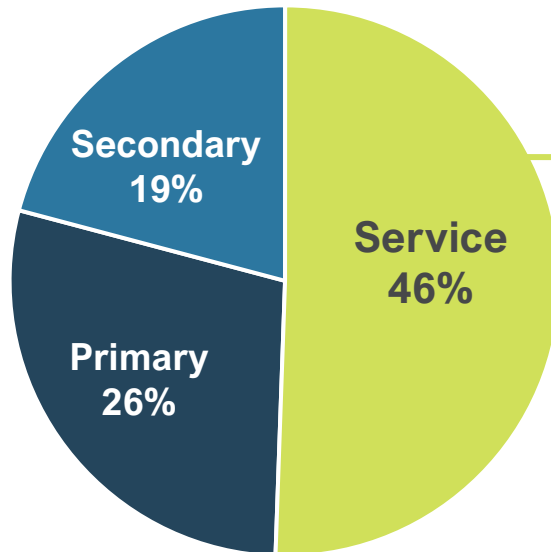
# Rwanda tourism context



# Economic relevance

Rwanda's economy is largely driven by the service sector which tourism is an essential component

Rwanda's economic sector contributions to Gross Domestic Product (GDP)



The tertiary sector is an important sector for Rwanda, contributing 46% to GDP.

**Retail, transport, hotel and restaurant, and cultural, domestic and other services** make up a large share of the tertiary sector. These service sectors have a **strong link to tourism**, therefore making tourism a key sector with significant spillover benefits.



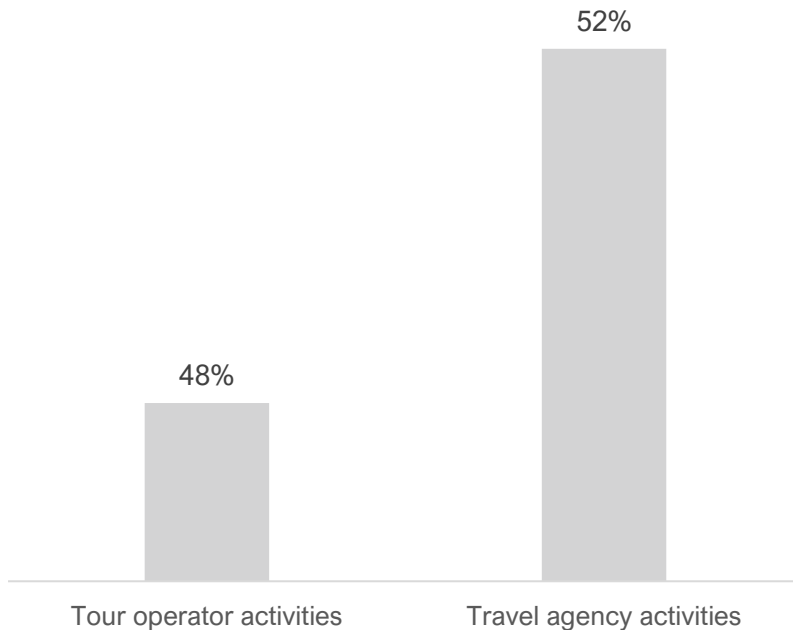
Tourism contribution to GDP about **10% in 2019** (estimate based on sectors associated to tourism, since tourism is not a distinct sector)- direct impact: 40% while indirect or induced impact: 60%



# Tourism sector overview

Tourism data predominantly represents external visitors rather than Rwandan nationals

**Businesses in the tourism sector**  
(N= 5785)



<b>Total visits (2019)</b>		1.3 million (85% external visitors)
<b>Total visits (2020)</b>		498,000
<b>Total visits (2021)</b>		512,000
<b>Facilities and services</b>	4 national parks:(Volcanoes (gorillas), Nyungwe (gorillas), Akagera (safari), and Gishwati-Mukura)	67,871 visits (64% external visitors)
	436 hotels	8,003 rooms  From 2010 to 2019, total overnight visitation more than doubled. International overnight stays <b>rose nearly 125%</b> over these 10 years, while domestic visits <b>increased more than 70%</b> .
<b>Natural assets:</b>	6 volcanoes, 23 lakes, rivers and rare species (gorillas)	



RDB (2022), NISR (2015), Tourism Economics (2021), RDB, (2019) (2021)



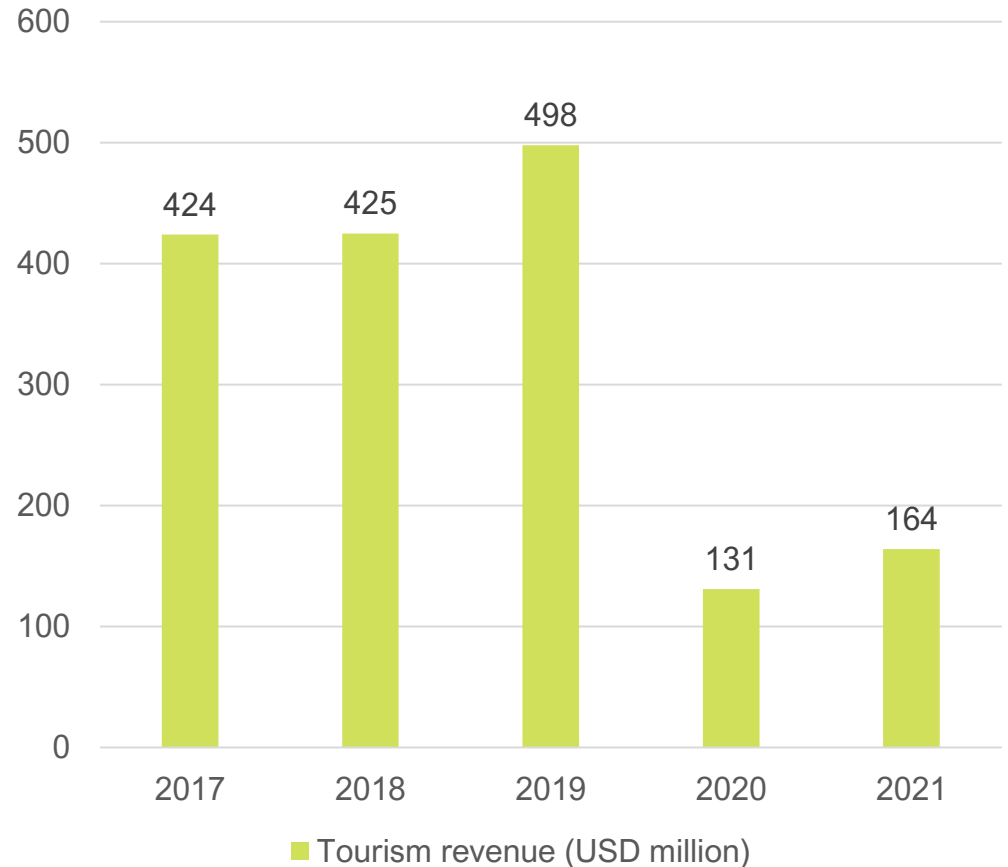
# Impact of Covid 19

Tourism activity was enormously impacted by Covid-19

## Impact of Covid:

- Prior to COVID-19, tourism was the leading foreign exchange earner
- Important conferences where cancelled
- The tourism sector, in particular, declined by about 75%
- Rwanda generated \$164 million USD in 2021. There was an increase of 25.2% between 2020 and 2021. However, it is far from pre-pandemic levels.
- Overnight visits to Rwanda are set to reach 2019 levels only by 2023.

Tourism revenue (USD million)



- ITA, ([2021](#)); AA ([2020](#)); RDB ([2021](#)); EATourism ([2021](#)); TourismEconomics ([2021](#))

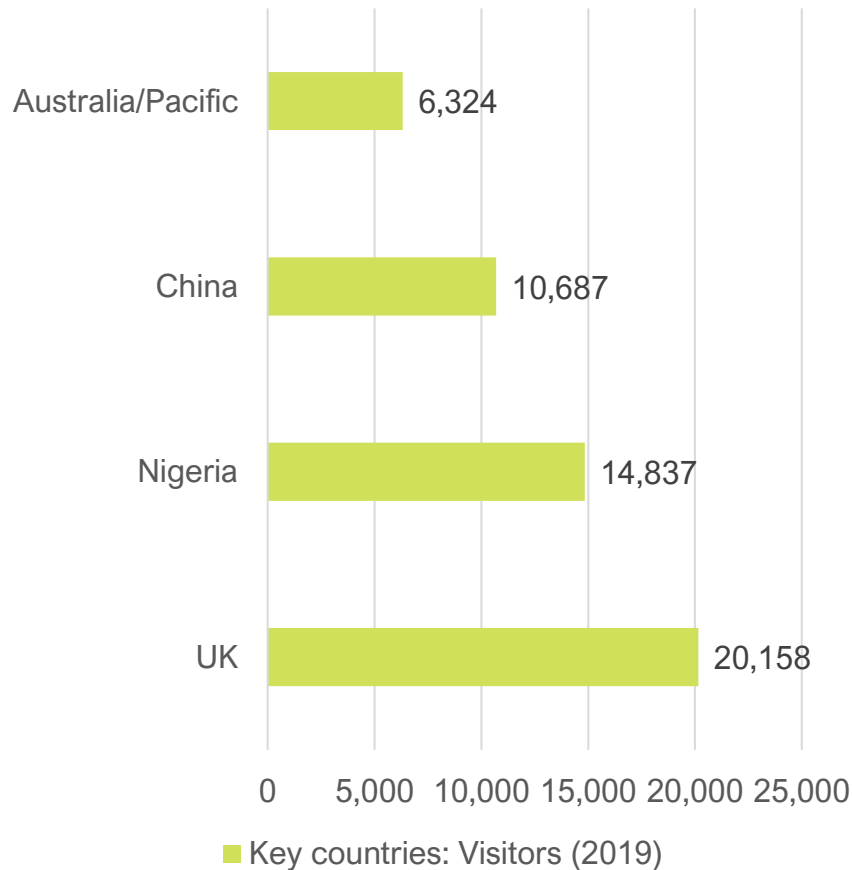




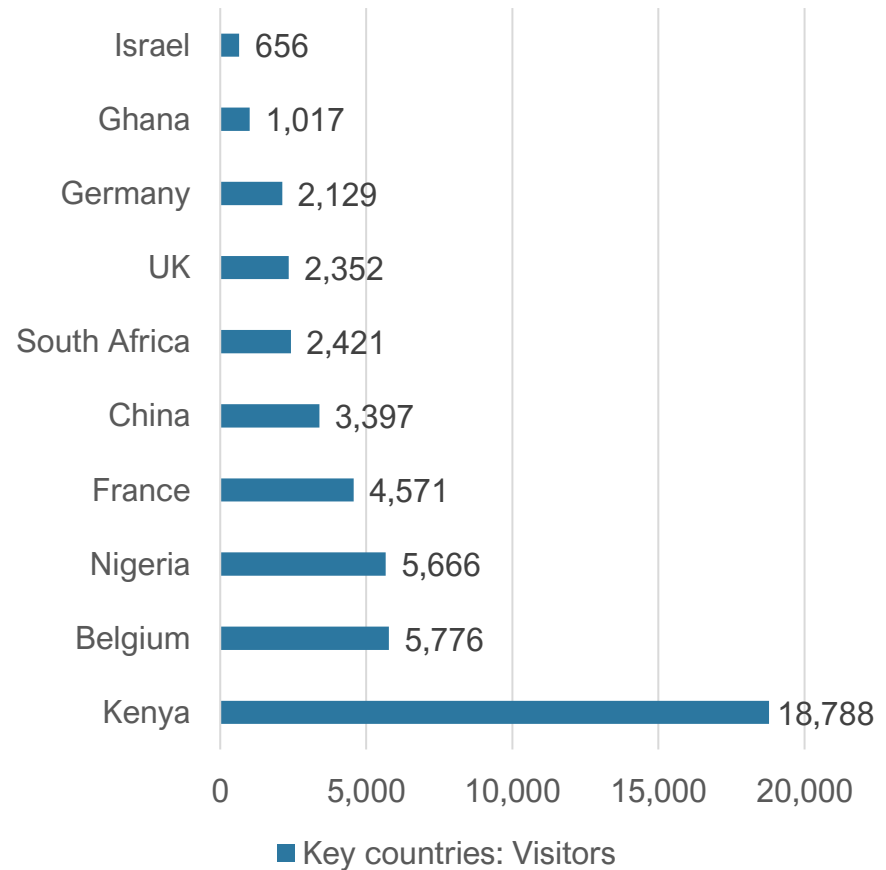
# Annual Visitors: key countries (2019 vs 2021)

Nigerians and Kenyans appear as key tourists in Rwanda

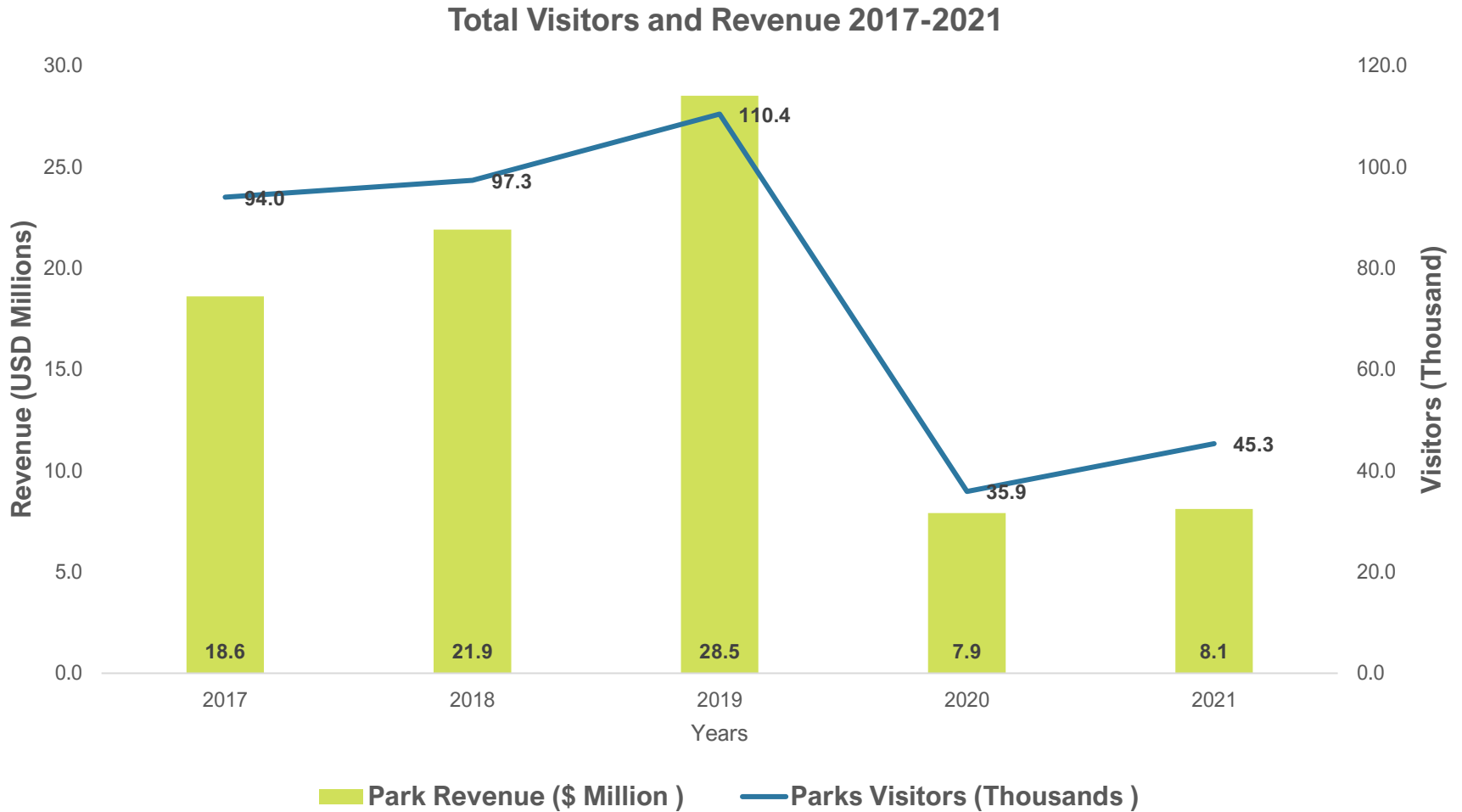
## Key countries: Visitors (2019)



## Key countries: Visitors (2021)



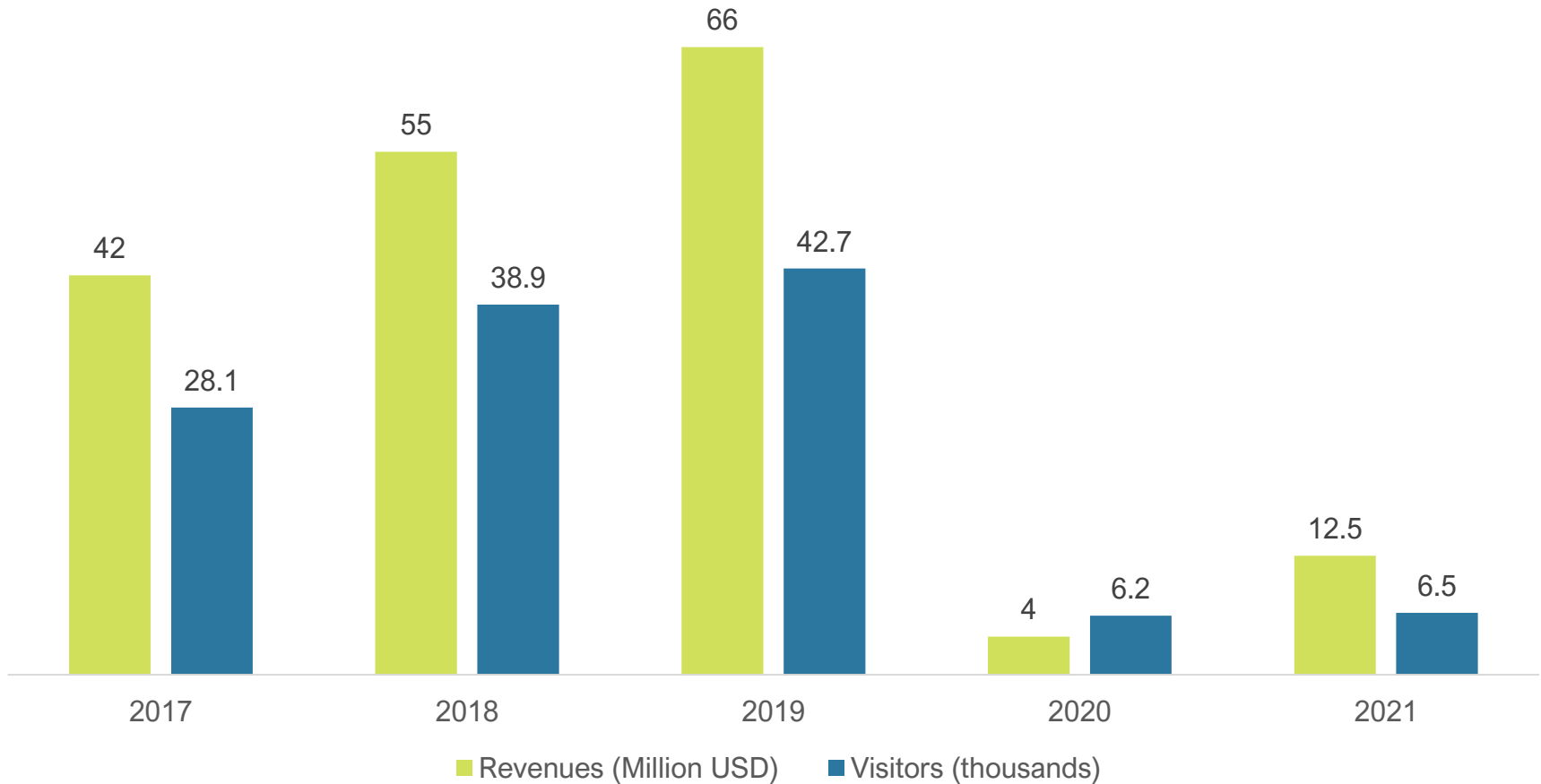
# Total Park Visitors and Revenue (2017-2021)



# MICE visitors and Revenues

MICE tourism historically a key driver of tourism but has yet to bounce back

## MICE: Visitors and Revenues Generated

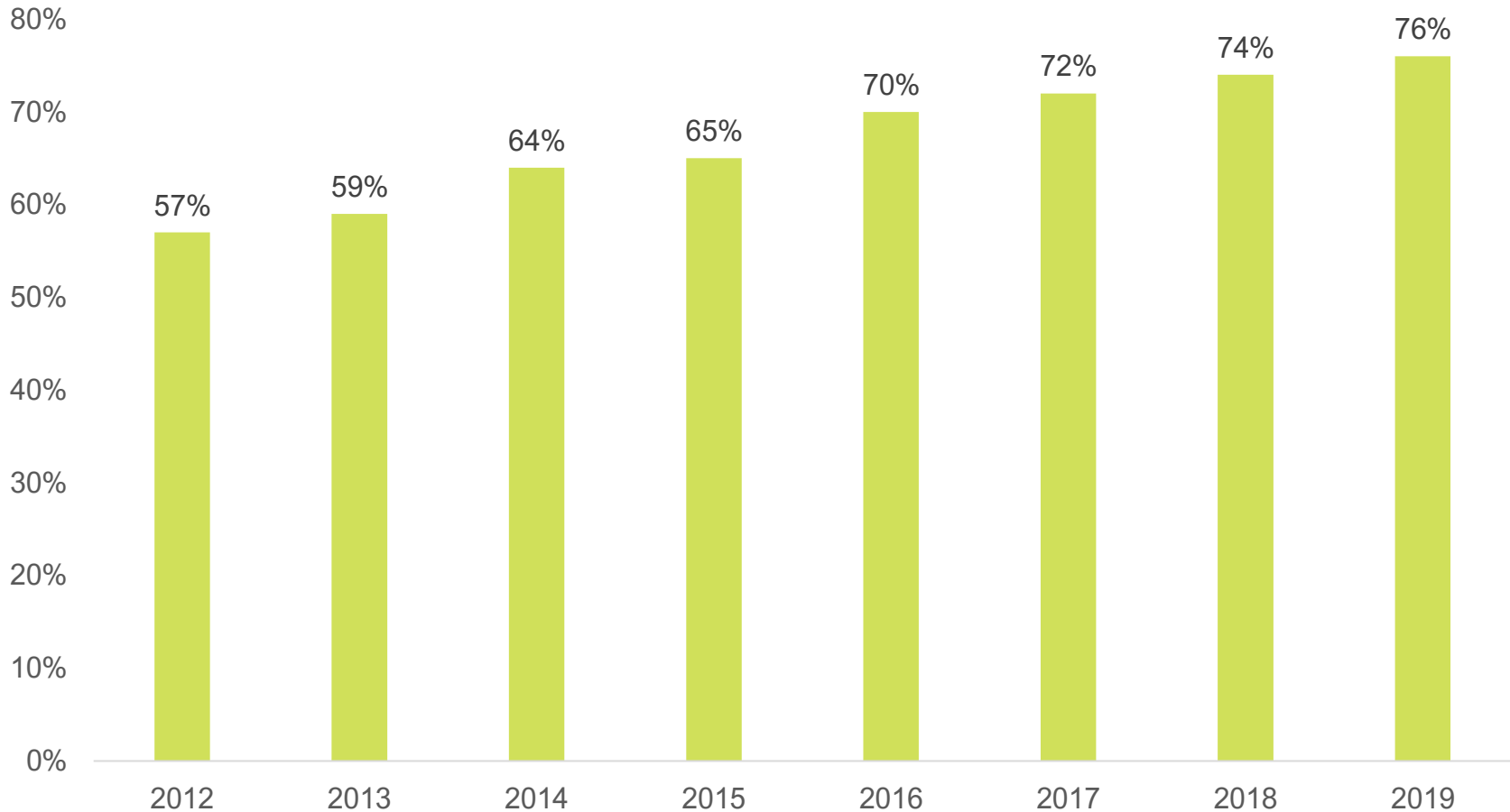


RDB, [\(2021\)](#)



# Hotel Bookings attributable to online platforms

Overnights stays in Rwanda booked or researched via a digital platform had systematically increased from 2012



■ % of nights attributable to online over time

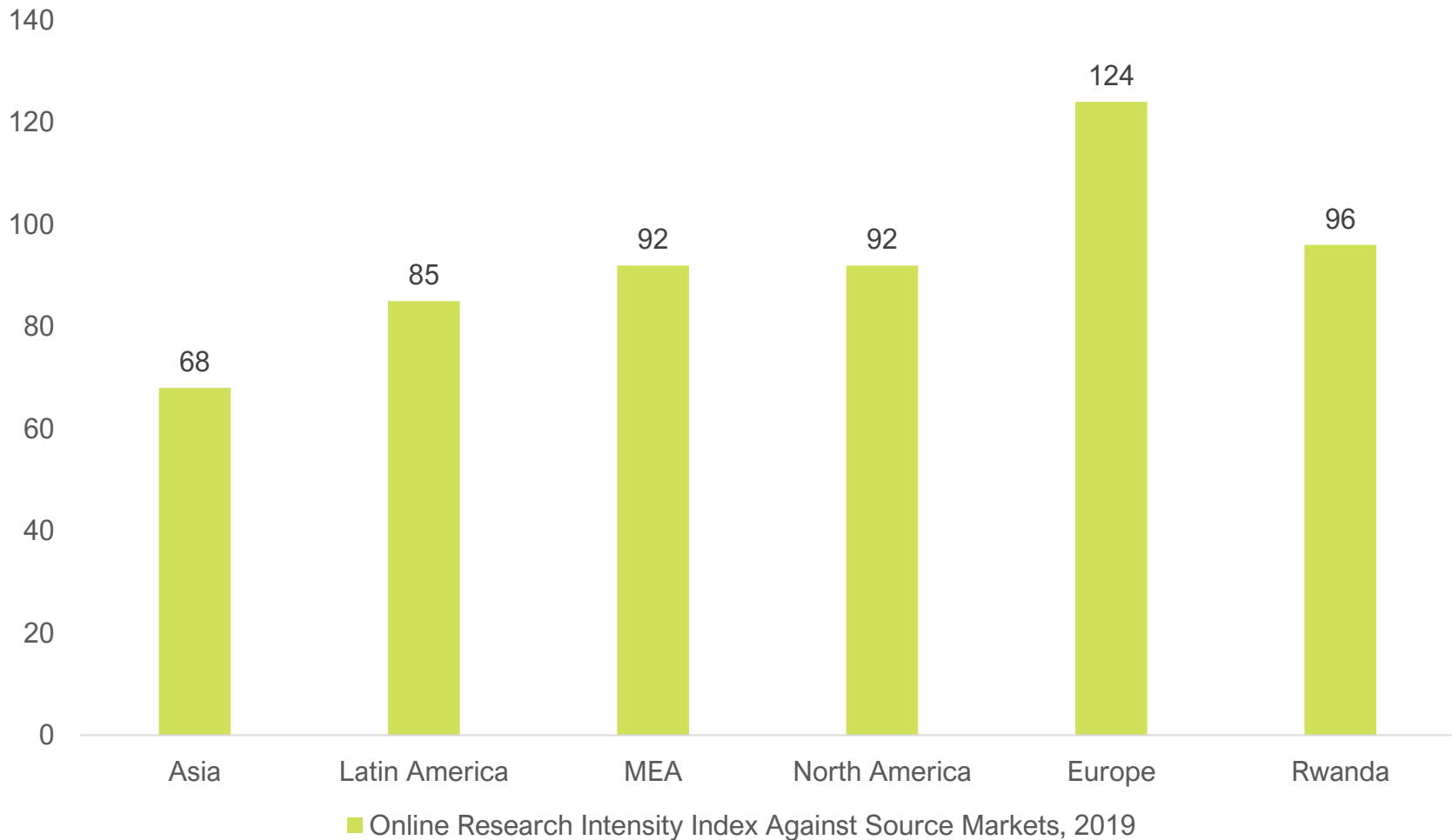


Tourism Economics, [\(2021\)](#)



# Intensity of tourism research online

Rwanda, when compared to source market regions in 2019, supported a greater intensity of online research than all regions besides Europe



Tourism Economics, [\(2021\)](#)



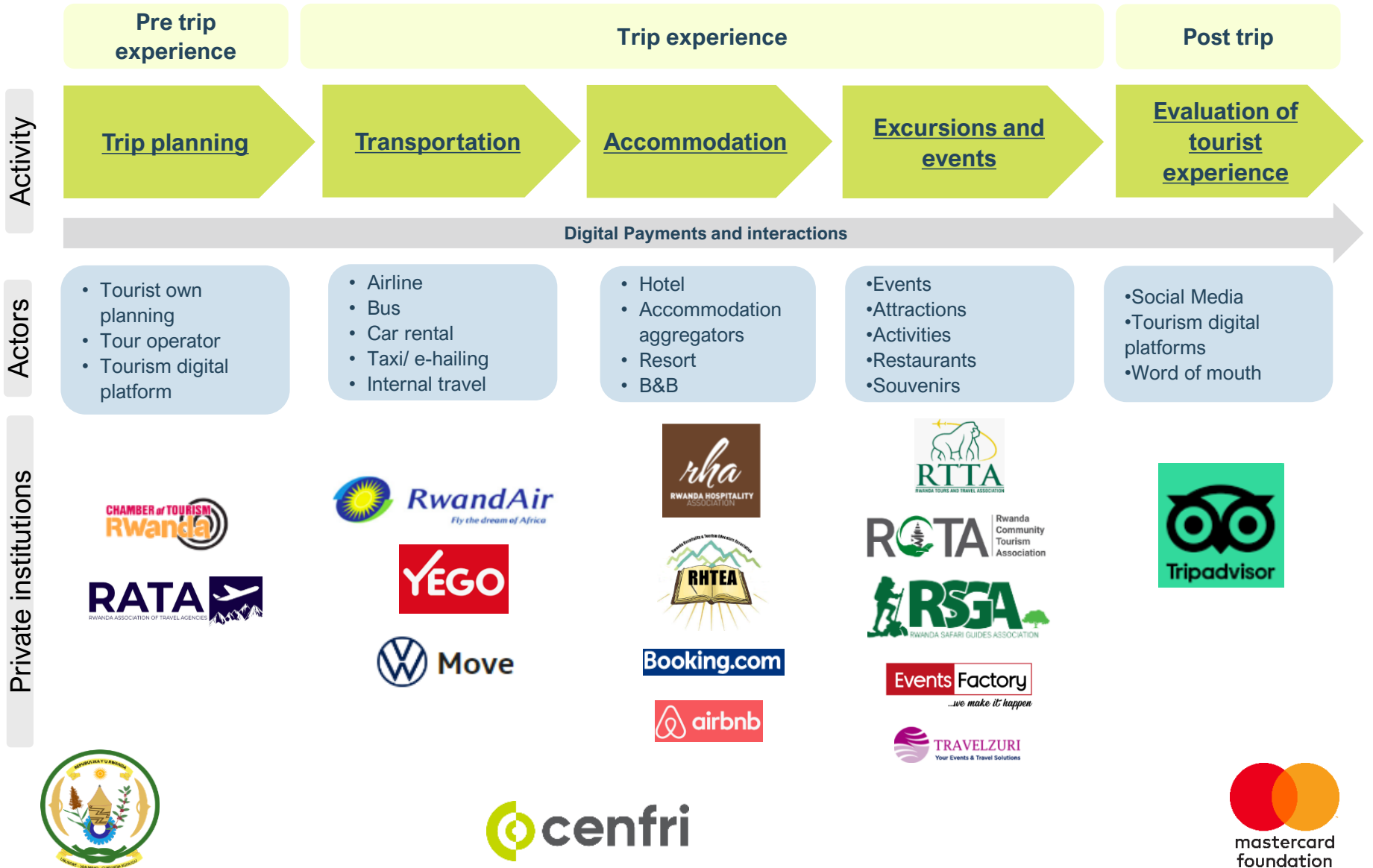
# **Overview of the tourism VC in Rwanda**





# Tourism value chain flow chart

Various private sector actors play vital roles at each stage of the VC

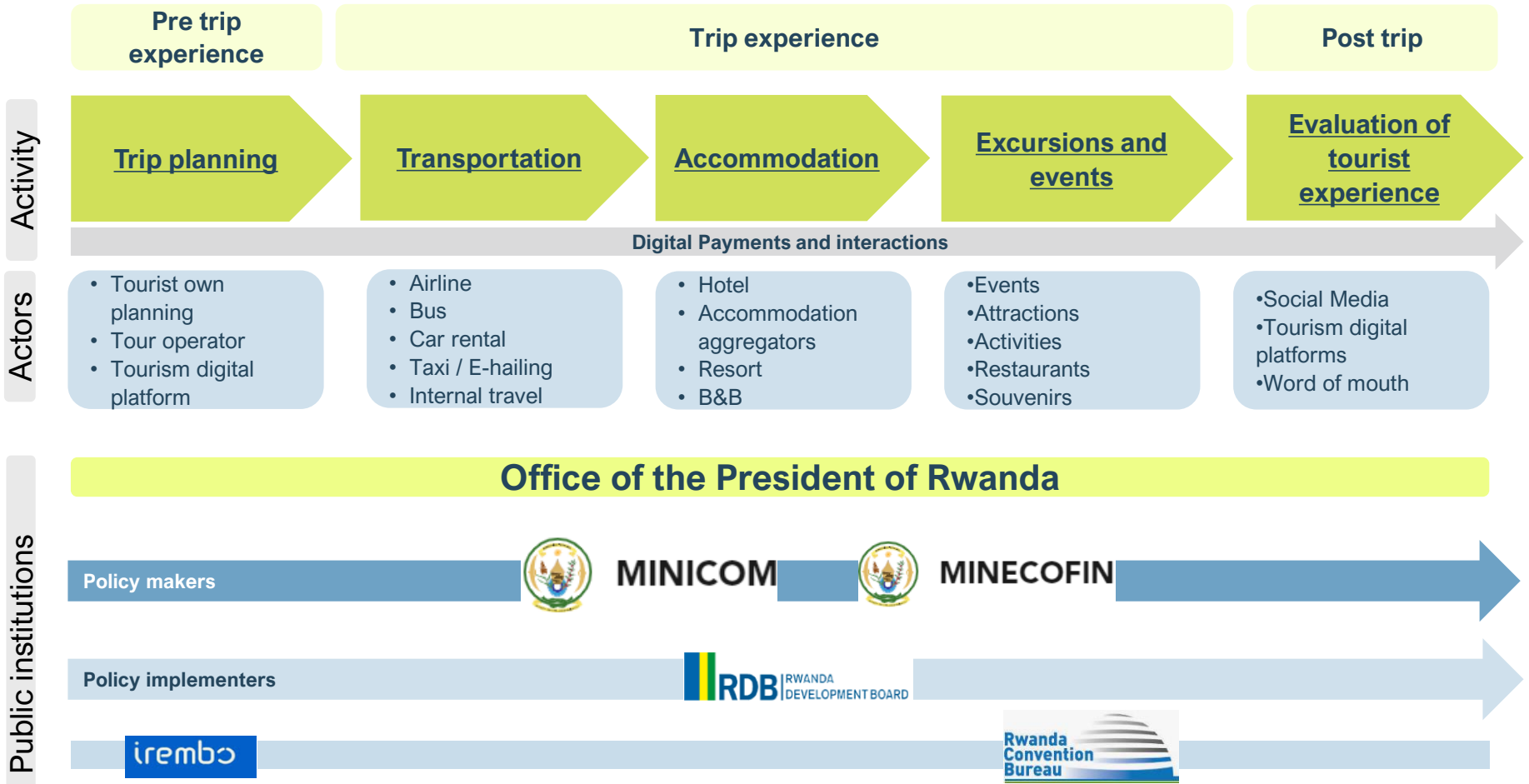


# **Key Tourism ministries and agencies**



# Tourism value chain flow chart

RDB is the primary public sector actor responsible for driving tourism development

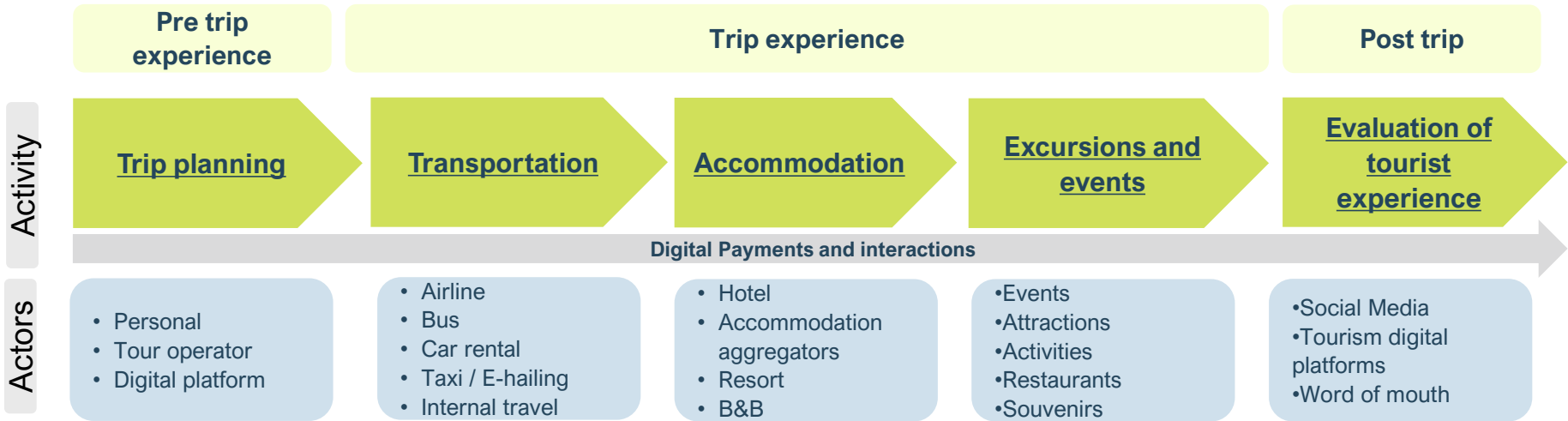


# **Tourism policy and strategic objectives landscaping**



# Tourism value chain flow chart

Policy and strategy objectives across the value chain



**National Tourism Policy (2009):** Increase tourism revenue to 800 mill USD and visitors to 2.2 mill / **Recovery Strategy:** reach pre-pandemic levels and beyond

Increase digital payments / widespread usage of international credit cards / Develop cashless innovations (**National Tourism Policy (2009); National Strategy for Transformation (2017-24); Rwanda vision 2050**)

Capacity and skills building for tourism professionals (**National Strategy for Transformation (2017-24); Rwanda Vision 2050**)

Policy objectives

**National tourism policy (2009):**

- Rwanda to have the capacity to provide tourism information, secure bookings and accept payments online

**Economic Development and Poverty Reduction Strategy (2013-18):**

- Expand Rwanda Air and airport connectivity
- Become a hub airport within EAC

**National Strategy for Transformation (2017-24):**

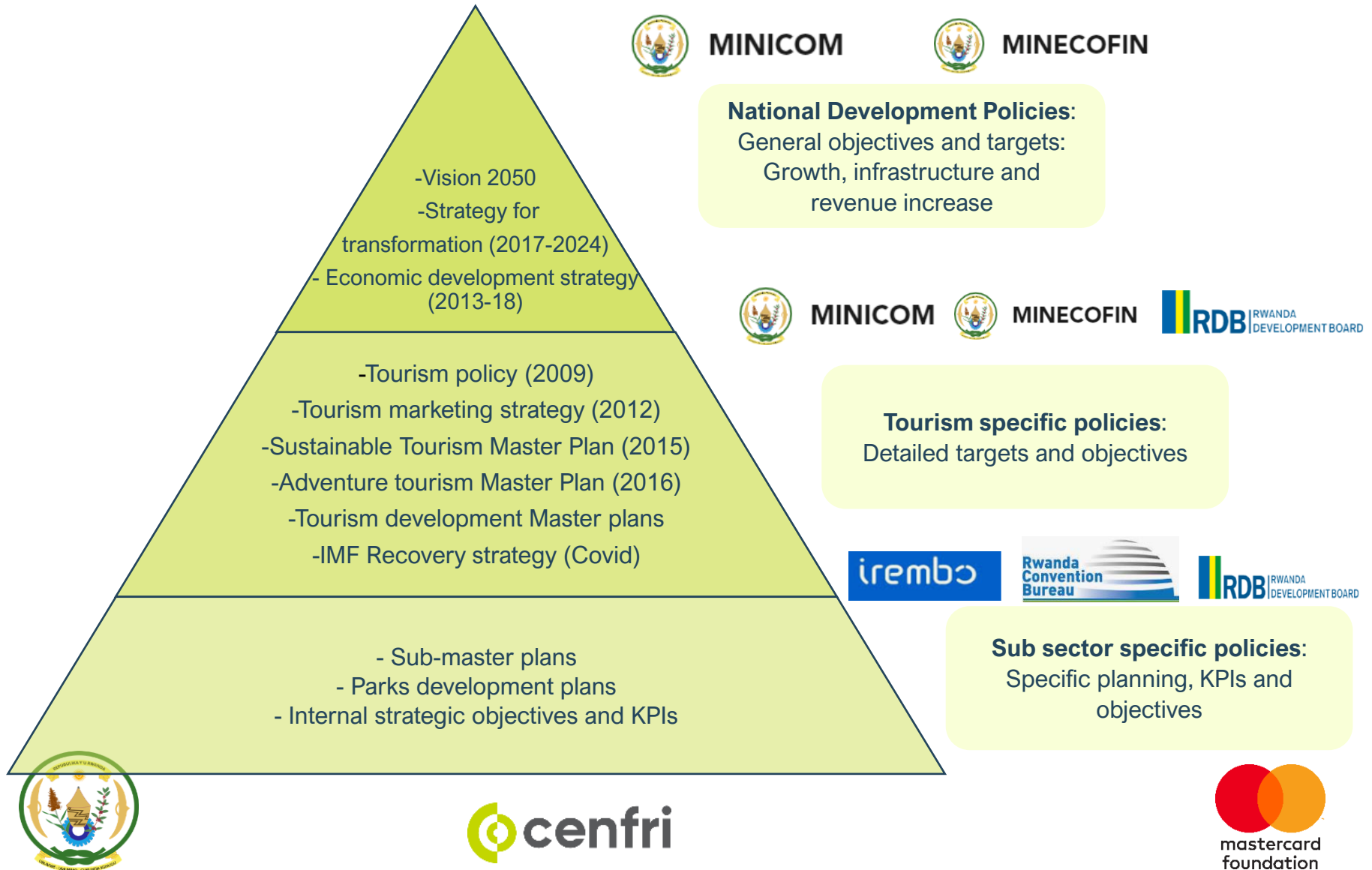
- Hotels to grow at 17.8% per year

- Restaurants to grow at 17.8% per year
  - Accelerate MICE by attracting big events and conferences
  - Develop new touristic products (MICE, birding, culture, agro-tourism)
  - Position Rwanda at the frontier of eco-tourism and conservation
- (National tourism policy (2009)  
National Strategy for Transformation (2017-24); Rwanda Vision 2050;)



# Public policies determine objectives at different levels

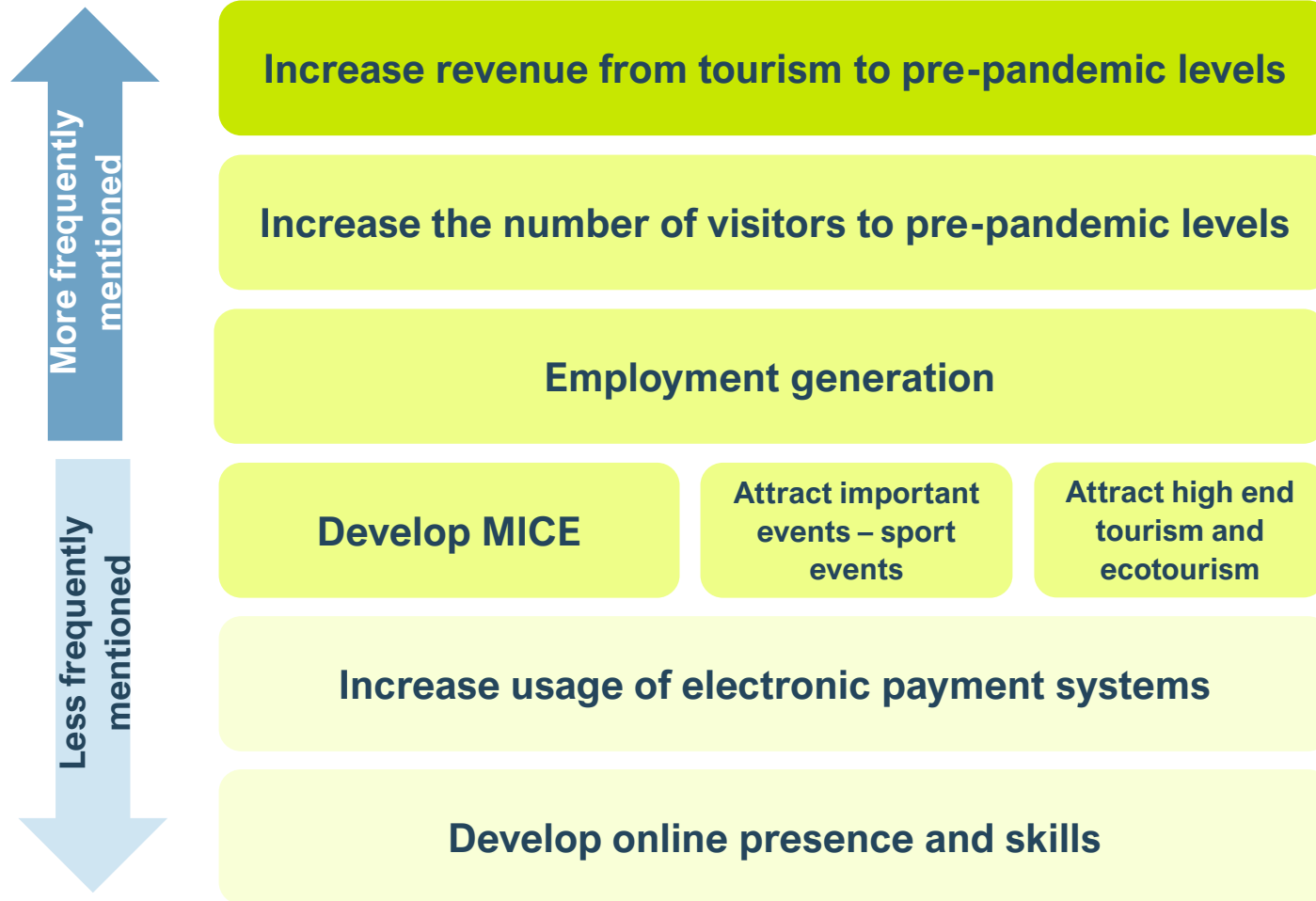
Policy making is mainly the duty of MINECOFIN and MINICOM





# Top policy objectives by prominence & frequency

Digitalisation and e-payments are prioritised but below revenue indicators



# Initiatives identified to achieve policy priorities

1. Expand connectivity (Expand Rwanda Air and airport connectivity);
2. Global publicity through high profile sponsorship
3. Develop ICT capacity and promote electronic payments and mobile money
4. Develop cultural and religious tourism
5. Attract investors to diversify their current high-end tourism offerings
6. Generate a greater understanding of the tourism value chain, and skill development for tourism professionals
7. Create a strong, consistent brand-building
8. Provide strategic plan and guidelines for the implementation in different parks



# Key take-aways

Digitalisation weakly targeted but can be embedded and driven to support revenue objectives



- The key overarching policy objectives for the sector are 1) to increase sector revenue and 2) grow the number of international visitors.
  - Secondary objectives are job creation, MICE development, particularly around sport and big events, and attracting high end tourism and ecotourism.
  - Some initiatives to achieve the mentioned policy goals have been identified from secondary policies. Infrastructure development, marketing and brand building strategies, and increased connectivity are highlighted as key activities to prioritise.
  - RDB is the primary policy implementer at each stage of the value chain and own the achievement of prioritized objectives, but collected data only analysed from a revenue and visitor perspective rather than digitalisation



**Key data sets identified**



# Main data sets available 1/5

Most relevant data sets are in RDB's hands

Value chain activity	Data set	Variables measured	Related Policy objectives
Cross-Cutting	RDB – Tourism survey	<ol style="list-style-type: none"> <li>Amounts of expenses during travels</li> <li>Activities done by tourist</li> </ol>	<ul style="list-style-type: none"> <li>Increase the revenue from tourism activities</li> </ul>
	RDB – Tourism revenue	2017 – 2021 – Revenues in the country from tourism	<ul style="list-style-type: none"> <li>Increase the number of visitors</li> </ul>
	RDB – Investment in the sector and Jobs created	<ol style="list-style-type: none"> <li>2015-2018 - Amount invested in the sector</li> <li>Number of jobs created</li> </ol>	<ul style="list-style-type: none"> <li>Develop MICE industry</li> </ul>
	RDB/UNECA – Visitors Expenditure	<ol style="list-style-type: none"> <li>Inbound tourism expenditure by classes of visitors. <b>Class of inbound visitor:</b> Overnight, same-day; <b>Categories of spending:</b> Accommodation, Food and drink, Local tour packages, Day tours and excursions, Other transport, Shopping</li> <li>Domestic tourism expenditure by products classes of visitors and types of trips. <b>Class of inbound visitor:</b> Overnight, same-day; <b>Categories of spending:</b> Accommodation, Food and drink, Local tour packages, Day tours and excursions, Other transport, Shopping</li> <li>Arrival Statistics. Purpose of visit by mode of transport: Air/Road; Air: Purpose of visit: Leisure, Visiting Friends and Relatives (VFR), Business, Transit, Other</li> <li>Tourist average length of stay by nights (weighted). Departure by: Air/Road; Air: Purpose of travel: Leisure, Visiting Friends and Relatives (VFR), Business Transit, Other. Road: Leisure, VFR, Business, Transit, Other; Total arrivals, total length of stay, total nights 2014.</li> <li>Tourists' expenditure per night and total expenditure (weighted) (Overnight, same-day, total). <b>Departure by:</b> Air/Road; <b>Air: Purpose of travel:</b> Leisure, Visiting Friends and Relatives (VFR), Business Transit, Other. <b>Road:</b> Leisure, VFR, Business, Transit, Other; <b>Total arrivals, total nights, spend per night RWF, Total Spend 2014.</b></li> <li>Breakdown of estimated international tourism expenditure 2014. <b>Categories of spending:</b> Accommodation, Food and drink, Local tour packages, Day tours and excursions, Other transport, Shopping.</li> </ol>	<ul style="list-style-type: none"> <li>Develop new products in the sector</li> <li>Invest in sector infrastructure to accelerate growth in the tourism sector</li> </ul>



# Main data sets available 2/5

Most relevant data sets are in RDB's hands

Value chain activity	Data set	Variables measured	Related Policy objectives
Trip Planning	Airbnb	<ol style="list-style-type: none"> <li><b>Rate of searches in a particular area in time:</b> "Searches for stays in your area have increased 174% compared to last year"</li> <li><b>Percentage of travelers from specific areas:</b> "20% of the travelers to your area come from less than 300km away"</li> <li><b>Average length of trips to an area:</b> "The average length of trips to your area is 5 nights"</li> <li><b>Most wanted amenities:</b> "most wanted amenities: Child-friendly, pool and wireless internet"</li> <li><b>Booking times:</b> "16% of trips to your area are booked less than a week before check-in"</li> <li>Seasons and cities with the highest demand</li> <li>Historical market trends</li> <li>Average ratings per region</li> </ol>	<ol style="list-style-type: none"> <li>Facilitate private investors in diverse districts to promote and improve tourism</li> <li>Rwanda to have the capacity to provide tourism information, secure bookings and accept payments online</li> </ol>
	Tourism Economics	<ol style="list-style-type: none"> <li><b>Percentage of nights attributable to online over time.</b> % of overnights stays in Rwanda in 2019 were booked or researched via a digital platform</li> <li><b>Online research intensity.</b> The index measures the ratio of digital platforms for travel planning relative to all information sources used in planning</li> <li><b>Use of online sites for travel.</b> % of entities using internet platforms: Destination, Accommodation, Transport, Operators, OTAs, Reviews, Social Media, Price comparison</li> <li><b>Digital travel footprint in Rwanda.</b> % of travel organized online</li> </ol>	





# Main data sets available 3/5

Most relevant data sets are in RDB's hands

Value chain activity	Data set	Variables measured	Policy objectives
<b>Transportation</b>	NISR – Visitors Arrivals in Rwanda	<ol style="list-style-type: none"> <li>2018-2020 - Number of arrivals by region (Asia, DRC, EAC, Europe, Nationals, North America, rest of Africa, resto of the world), mode of transport (air, road)</li> <li>2018-2020 - Number of arrivals by purpose of visit (Business, Conference, Education, Holiday, Medical, Mission, Transit, Visit, Other reasons, Total) and mode of transport (air, road)</li> <li>2016-2017 - Number of arrivals by purpose of Visit (Holiday/Vacation, Visiting Friends &amp; relatives, Business/conference/official, Transit, Other purposes, Total) and Country of origin (Africa, America, East Asia/Pacific, Europe, Middle East, South Asia, UN)</li> <li>2020-2021 - Entry and Exits by purpose of movements by purpose of movement (Business, Conference, Educations, Holiday, Medical, Mission, Transit, Visit, Other Reasons, Total)</li> </ol>	<ol style="list-style-type: none"> <li>A more pro-active approach to the airlines serving Rwanda</li> <li>Invest in sector infrastructure to accelerate growth in the tourism sector. (Roads, airports)</li> <li>Expand Rwanda Air and airport connectivity to support tourism and to become a hub airport within the East Africa region</li> <li>Increase visits to 2.2 million</li> <li>Increase arrivals from targeted markets</li> <li>Finalise developing a tourism circuit and tourism infrastructure</li> </ol>
	RDB – Annual Visitors	<ol style="list-style-type: none"> <li>2021 Visitors by Region</li> <li>2021 Key countries from number of visitors</li> </ol>	
	RTDA – Roads classification	<ol style="list-style-type: none"> <li>2018-2020 Classification of roads (National paved roads, National unpaved roads, District and Kigali City Roads)</li> <li>Number of Km of National Paved and Unpaved Roads by Districts (Every district in Rwanda)</li> </ol>	
	Yego Moto – e-hailing statistics	<ol style="list-style-type: none"> <li>2017-2022 Number of trips, start and end location, rider, payment mode, distance covered, type of transport, duration, distance, star and end time, driver and feedback</li> </ol>	



# Main data sets available 4/5

Most relevant data sets are in RDB's hands

Value chain activity	Data set	Variables measured	Policy objectives	
<b>Accommodation</b>	RDB – Number of Accommodation facilities and rooms per district	2018-2020 Number of hotels and rooms per district (all 30 Rwandan districts)	<ol style="list-style-type: none"> <li>1. Capacity building: skill development for tourism professionals, including hotel employees</li> <li>2. Improve hotels regulatory framework Hotels to grow at an average rate of 17.8% per year from 2020 onwards.</li> <li>3. Capacity building: skill development for tourism professionals, including hotel employees</li> <li>4. Improve hotels regulatory framework</li> </ol>	
<b>Excursion/ Events</b>	RDB –Visitors for Conferences and Revenues	2016 – 2020 Visits for Conferences and Revenues Generated (USD)	<ol style="list-style-type: none"> <li>1. Product development: strengthening MICE, adventure products and others, in relation to the market demand.</li> </ol>	
	RDB – Park Visits data	<ol style="list-style-type: none"> <li>1. 2005-2017 Park visits (Volcanoes, Akagera and Nyungwe)</li> <li>2. 2008-2020 Number of visitors to different National Parks by nationality (Rwandan residents, foreign residents, foreign visits)</li> </ol>	<ol style="list-style-type: none"> <li>2. Position Rwanda at the global frontier of conservation (sustainable ecotourism)</li> <li>3. Positioning Rwanda as a world class and high-end ecotourism destination</li> </ol>	
	RDB – Park Visits (local and foreign) and revenue	<ol style="list-style-type: none"> <li>1. 2017-2021 Domestic Visitors and Revenue (USD)</li> <li>2. 2017-2021 Total Visitors and Revenue (USD)</li> </ol>	<ol style="list-style-type: none"> <li>4. - Developing priority value chains such as tourism (including MICE tourism)</li> </ol>	
	RDB – MICE data	<ol style="list-style-type: none"> <li>1. 2017-2021 MICE visitors</li> <li>2. Revenues generated (USD)</li> </ol>	<ol style="list-style-type: none"> <li>5. Accelerating MICE tourism growth by attracting big events and conferences and developing cultural and religious tourism working with the private sector and strengthening the Rwanda Convention Bureau</li> </ol>	
	RDB – Number of Gorillas	2018-2020 Number of gorillas families, newborn gorillas, total number of monitored gorillas		
	RCB – MICE data	Number of visitors to event		



# Main data sets available 5/5

Most relevant data sets are in RDB's hands

Value chain activity	Data set	Variables measured	Policy objectives
<b>Evaluation of tourist experience</b>	Feedback on digital platforms	Feedback on: Hotel experiences Tours and experiences Transport Restaurant experiences Events	1. Product development: strengthening adventure products and others, in relation to the market demand.
	RCB – Feedback on tourism experience	Feedback on people visiting the country	
<b>Digital Payments</b>	BNR – Mobile Money Data	1. Ci/Co transactions 2. Transaction volume 3. Transaction value	1. Develop ICT capacity and promote electronic payments and mobile money
		1. Number of electronic transactions  2. Electronic transactions related to tourism sector activities	2. Increase usage of electronic payment systems



# **Data-mapping to inform key tourism objectives and opportunities**



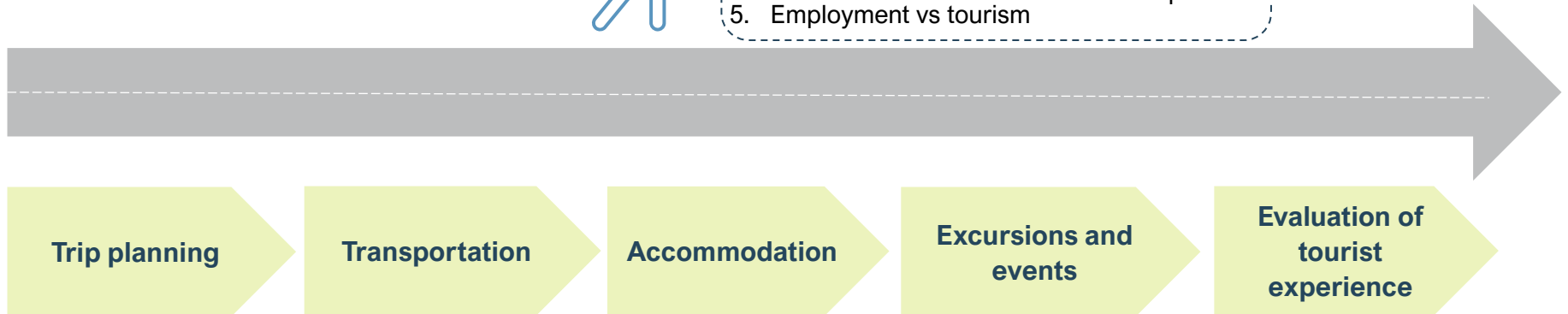
# Unit(s) of analysis for the tourism sector

Understanding the type and quality of a tourist's experience requires tracking them, as a unit of analysis, across the entire value chain



## Look at:

1. Tourism expenditure
2. Tourist/Traveller
3. Citizenship vs country of residence
4. The main destination of a tourism trip
5. Employment vs tourism



Trip planning

Transportation

Accommodation

Excursions and events

Evaluation of tourist experience

## Look at:

1. Transportation to or from the destination, and transportation at the destination
2. Number of vehicles for road transport/aircrafts, vessels, for air and water;
3. Number of available seats;
4. Number of passengers transported;
5. Capacity utilization;
6. Number of passenger-kilometres produced.

## Look at:

1. Length of stay
2. Months operating in the year
3. Number of rooms or accommodation units
4. Number of bed places
5. Occupancy rates
6. Revenue per available room

## Look at:

1. Revenue: (i) collected directly, (ii) commercial margins (buying to a lower price to which it is sold), and (iii) commissions paid by providers of tourism services
2. Trips without package;
3. Domestic packages.
4. Inbound trips without package;
5. Outbound trips without package;
6. Inbound package;
7. Outbound package.



# RCB and RDB's expectations from Data to be analysed by Cenfri

1. Delegate Nationality
2. Transport mode: Airline company or Road.
3. Where does the visitor stay?
4. Which Hotel? Type of hotel?
5. With friends or relatives?
6. Delegates expenditure - How much did the delegates spend while in Rwanda, and what did they spend on?
7. Event delegates are attending.
8. The origin and destination of domestic tourists and the length of stay
9. The daily spend of domestic tourists by destination and gender
10. Places visited and length of stay in the places visited according to this table:

Region	Business	Conference	Official mission	Education	Health	Transit	Visiting friends and relatives
Asia							
EAC							
Europe							
North America							
Rest of Africa							
Rest of the world							





# Trip planning

## Related policy objectives

- Increase Tourism revenue and number of visits
- Rwanda to have the capacity to provide tourism information, secure bookings and payments online
- Increase availability of digital payments

## Opportunities

1. **Increasing the presence** of Rwanda Travel Operators and other tourism players **online**, specially into global platforms, can facilitate access and visibility to foreign tourists
2. **The quantification of the business case** to use online platforms is required to incentivise actors to digitalise their processes
3. Most tourists book digitally, so **the payment ecosystem needs to be seamless** and cater for various payment methods across tourists

## Key questions

1. Why do people come to Rwanda, what is their motivation?
2. How most people plan their stay in Rwanda (travel agency or independently)?
3. How can we assess what makes a Rwandan businesses' online presence effective? (effective visibility, compelling sales pitch, credible)
4. How can we quantify the changes in revenue when tourism businesses are present online and when they are not?
5. How many tourism businesses are marketed through an international digital platform (Airbnb, Viator, booking.com)?
6. How do the prices of packages, tours and experiences compare to other similar countries?
7. What has been the impact and ROI of “visit Rwanda” and other similar investments?
8. How relevant is the Rwanda’s MICE offering online in contrast with other countries?
9. Does Rwanda have the things that companies and event organisers look for when looking for a venue?
10. How many languages do your postings cover? What is the relative success rate between key languages?
11. Do tourist perceive the Rwandan digital payments ecosystem as safe?

## Data sets available

### Tourism Economics

1. **Percentage of nights attributable to online over time.** % of overnights stays in Rwanda in 2019 were booked or researched via a digital platform
2. **Online research intensity.** The index measures the ratio of digital platforms for travel planning relative to all information sources used in planning
3. **Use of online sites for travel.** % of entities using internet platforms: Destination, Accommodation, Transport, Operators, OTAs, Reviews, Social Media, Price comparison
4. **Digital travel footprint in Rwanda.** % of travel organized online

### Airbnb

1. **Rate of searches in a particular area in time:** “Searches for stays in your area have increased 174% compared to last year”
2. **Percentage of travelers from specific areas:** “20% of the travelers to your area come from less than 300km away”
3. **Average length of trips to an area:** “The average length of trips to your area is 5 nights”
4. **Most wanted amenities:** “most wanted amenities: Child-friendly, pool and wireless internet”
5. **Booking times:** “16% of trips to your area are booked less than a week before check-in”



# Transportation

## Related policy objectives

- Increase Tourism revenue and number of visits
- Rwanda to have the capacity to provide tourism information, secure bookings and payments online
- Increase availability of digital payments
- Expand Rwanda Air and airport connectivity
- Become a hub airport within EAC

## Opportunities

1. Better **understanding** of the preferred **traveling patterns** and source of tourist can maximise accessibility of Rwanda to more regions.
2. Identify **what is preventing e-hailing platforms from expanding the scope of services** (territory covered and type of service) can facilitate new business opportunities
3. E-hailing does not currently play a central role for tourism. **Digital integration of traditional players** (shuttle services providers) to e-hailing platforms and to **digital payments ecosystems** can improve services

## Key questions

1. What kinds of inbound transportation are paid digitally?
2. What kind of internal transportation is paid digitally?
3. How often tourist book transportation in advance, and how often do they use on-demand services?
4. What is the impact of transportation digital platforms in the provision of touristic services?
5. How relevant is road transportation into Rwanda for priority touristic activities (excluding FRV)?
6. What is the correlation between new air routes to Rwanda an increase in visitors?
7. What do visitors think about the quality of transportation?
8. Which is the main airline used?
9. What are the main travel hubs to get to Rwanda?
10. Which kind of transportation is used by the different kinds of tourist?

## Data sets available

### NISR

- 2018-2020 - Number of arrivals by region (Asia, DRC, EAC, Europe, Nationals, North America, rest of Africa, resto of the world), mode of transport (air, road)
- 2018-2020 - Number of arrivals by purpose of visit (Business, Conference, Education, Holiday, Medical, Mission, Transit, Visit, Other reasons, Total) and mode of transport (air, road)
- 2016-2017 - Number of arrivals by purpose of Visit (Holiday/Vacation, Visiting Friends & relatives, Business/conference/official, Transit, Other purposes, Total) and Country of origin (Africa, America, East Asia/Pacific, Europe, Middle East, South Asia, UN)
- 2020-2021 - Entry and Exits by purpose of movements by purpose of movement (Business, Conference, Educations, Holiday, Medical, Mission, Transit, Visit, Other Reasons, Total)

### RDB

- 2021 Visitors by Region
- 2021 Key countries from number of visitors

### RTDA

- 2018-2020 Classification of roads (National paved roads, National unpaved roads, District and Kigali City Roads)
- Number of Km of National Paved and Unpaved Roads by Districts (Every district in Rwanda)

### YEGO Moto

- 2022 Number of trips, start and end location, rider, payment mode, distance covered, type of transport, duration, distance, star and end time, driver and feedback

### Move (VW)

- 2022 Number of trips, start and end location, rider, payment mode, distance covered, type of transport, duration, distance, star and end time, driver and feedback



# Accommodation

## Related policy objectives

- Increase Tourism revenue and number of visits
- Capacity building: skill development for tourism professionals, including hotel employees
- Employment creation
- Hotels to grow at an average rate of 17.8% per year from 2020 onwards.
- Rwanda to have the capacity to provide tourism information, secure bookings and payments online
- Increase availability of digital payments

## Opportunities

1. Enhance the **visibility of accommodation online** and their link with other touristic activities or events to achieve easier engagements and more “clicks”
2. **Enhanced coordination** between hotels and hospitality entities can aggregate and unlock data-driven insights which are scarce
3. Creating an annual ranking of accommodations quality together with the RHA can increase the visibility of specific members and make the quality of those options clear to prospective consumers
4. Look into the possibility of **further expanding the tourism offering** beyond high-end tourism can attract local and middle-income international tourists. There are segmented offering in almost every country.

## Key questions

1. What are the most relevant channels for booking accommodation?
2. How relevant is for tourists to be able to pay for accommodation in advance?
3. What is the main determinant for choosing a specific hotel?
4. What is the main platform used for booking and why?
5. Is accommodation booked separately or is it usually predetermined by the tour operator?
6. What is the role of tour operator thorough the chain?
7. How often the hotels capacity is reached?
8. How affordable is accommodation compared to other countries which provide similar experiences?
9. Hoe many of the tourism professionals are appropriately skilled for the job?
10. What kind of skills are needed in the sector? (considering non traditional skills, such as digital skills)

## Data sets available

### RDB

2018-2020 Number of accommodation facilities and rooms per district (all 30 Rwandan districts)

### Airbnb

2022 Number of properties available, quality of properties, country of origin of customers, length of stay, seasons and places with the highest demand, types of properties, features with the highest demand.

### Booking.com

2022 Number of hotels and properties available, , country of origin of customers, length of stay, seasons and places with the highest demand



# Excursions and Events

## Related policy objectives

- Increase Tourism revenue and number of visits
- Rwanda to have the capacity to provide tourism information, secure bookings and payments online
- Increase availability of digital payments
- Product development: strengthening MICE, adventure products and others, in relation to the market demand.
- Position Rwanda at the global frontier of conservation (sustainable ecotourism)
- Positioning Rwanda as a world class and high-end ecotourism destination

## Opportunities

1. **Stronger linkages** between accommodation providers, transport providers and events providers, both online and offline, will be strongly mutually beneficial
2. Identifying the **factors that lead to MICE expansion** in the past can inform the policy actions for expanding the subsector to sports and other relevant events.
3. The speed and reliability of POS is not always good, **improvement of digital payments capacity** is increasingly relevant, particularly in remote areas
4. A **better online presence** can link more players to the value chain, local platforms can be improved to compete with international ones

## Key questions

1. What is the main source of revenue for events organisers?
2. How easy is it for a tourist to access the information a) of an event/ attraction b) how to access it. Proxies could be number of links/ clicks between a hotel website to an event, for example
3. What are the main costs for events organisers?
4. What is considered by people wanting to organise an event in Rwanda?
5. How much are people willing to spend to get to Rwanda depending on the nationality?
6. Which are the products which bring the most revenue to the tourism economy in general?
7. What is the impact of sport events organised on the number of visitors?
8. What is the ROI of organising sport events vs other events?
9. Is there an impact in the price of the gorillas licences on the number of tourist visiting?
10. Which are the main means used by tourist to pay for tours. Are these trends changing? If so, why?
11. How much do tourist spend in cash and in what?
12. How much do tourist spend with credit cards and in what?
13. How much of that money is spent in restaurants which mainly serve tourist?
14. How much of the events fees are paid digitally?
15. How can TIN numbers, establishment identification numbers and card transactions data be linked to inform tourism data?

## Data sets available

### RDB

- 2016-2022 RDB –Visitors for Conferences and Revenues
- Park Visits data
- Park Visits (local and foreign) and revenue
- MICE data (visitors and revenue)
- Number of Gorillas

### RCB

- Number of visitors per event

### RTTA

- Number of companies in the sector and activities
- Type of activity, number of activities, and cost of activities

### Events factory

- Events organized, registration processed, type of events, payment platforms used, feedback and surveys

### Travel Zuri

- Data on Hotel, events, or transferred booked.
- Payment type used



# Evaluation of tourism experience

## Related policy objectives

- Increase Tourism revenue and number of visits
- Product development: strengthening adventure products and others, in relation to the market demand
- Capacity building: skill development for tourism professionals, including hotel employees

## Opportunities

- Obtaining **constant feedback** from tourist is essential to understand the needs and opportunities for improving the quality of the sector
- There are currently **not sufficient feedback mechanisms** and methods to analyse them, additional coordination is needed to centralise feedback
- **Digitalisation on feedback provision mechanisms** can make the collection of feedback more efficient

## Key questions

1. What do tourist think on average about Rwanda?
2. How prone are tourists to return? Which kind of tourists are more prone to return?
3. How does the evaluation of the experience impact the tourist's willingness to recommend the destination to others?
4. How can feedback be tracked efficiently and objectively analysed?
5. How is the quality of accommodation measured?

## Data sets available

### Online feedback on national and international digital platforms

- Hotel experiences and quality
- Tours and experiences
- Transport
- Restaurant experiences
- Events

### RCB

- Feedback on tourism experience related to MICE

### Events Factory

- Surveys to events' participants



# Key take-aways

Increase coordination and online presence are relevant opportunities for the sector



- **Main opportunities for MINICT/RDB to focus on**

1. Increasing online presence and visibility of all actors in the value chain
2. The quantification of the business case to use online platforms is required to incentivise actors
3. A better understanding of traveling patterns using private and public data sets is necessary.
4. Explore the possibilities for a more integrated and seamless digital payments ecosystem
5. Enhanced linkages and coordination between entities (e.g., hotels and hospitality) can aggregate and unlock data-driven insights
6. Creating an annual ranking of accommodations quality to increase the visibility of specific members
7. Further expanding the tourism offering beyond high-end tourism can attract local and middle-income international tourists.
8. Identify the main factors that have led to MICE expansion to replicate them (Sports, culture, and congresses)
9. Understand key expenditure activities for tourist across the value chain to focus efforts in those sectors

- **Most relevant data sets**

1. Data gathered and in possession of RDB, RCB on number, type and purposes of visitors, number of accommodations, expenditure per visitor, MICE data (type of events, number of visitors), park visits
2. Local and international digital platforms data: Yego, Move, Airbnb, Booking.com data on traveling patterns, preferred payments method, and most demanded services.



# Potential methodologies for data analysis



# Techniques used to track tourists

Tourist tracking techniques	Technique	Data usually collected
Surveys (traditional surveys)	Questionnaires with the objective of gathering data about tourists' characteristics, the activities they have carried out during their trip and the amount of money spent during their trip	<ul style="list-style-type: none"> <li>• Sociodemographic characteristics of the visitors</li> <li>• Their motivations</li> <li>• The estimated expenditure made during the trip</li> <li>• The place of stay</li> <li>• The activities carried out and the degree of satisfaction with them</li> </ul>
Street surveys	Questionnaires related to tourists' itineraries during the day in which they are surveyed. Carried out in places with a great confluence of tourists.	<ul style="list-style-type: none"> <li>• Activities carried out</li> <li>• Time and space itinerary followed expenditure made</li> </ul>
Travel diaries	Tourists surveyed must be specific groups of tourists who must be questioned daily from the first day of stay until the day of departure	<ul style="list-style-type: none"> <li>• Places tourists have visited,</li> <li>• The order of visits</li> <li>• How tourists have travelled from one place to another</li> <li>• Time when these visits occurred</li> </ul>
Social Media	Search for a hashtag, specific geotag, or photography taking pattern linked to the destination can be used, among others (such as those hashtags linked to an enterprise or attraction).	<ul style="list-style-type: none"> <li>• Main and secondary tourist attractions of the destination</li> <li>• Tourists' opinions about them</li> <li>• Perceived image of the destination.</li> <li>• Most visited spots</li> <li>• Temporary itinerary</li> </ul>
Travel Fora	Configures as social media. Through the number of comments, it is possible to identify which are the main attractions of the destination, and which are secondary ones	<ul style="list-style-type: none"> <li>• Determine the degree of satisfaction of tourists</li> <li>• Perceived image of a destination</li> <li>• Profile of potential tourists seeking information</li> </ul>





# Techniques used to track tourists in the world

Geolocation has been used in more than 50% of tourist tracking studies

Tourist tracking techniques	Technique	Data usually collected
Electronic devices tracking-GPS (geolocation)	<ol style="list-style-type: none"> <li>Most appropriate is the tracking of mobile phone users:               <ul style="list-style-type: none"> <li>trace the origin of the electromagnetic frequencies of the active telephones in the destination during a given period</li> <li>formal request to a telephone company for a report of the movements and characteristics of users of foreign telephone numbers in a specific destination</li> </ul> </li> <li>Portable devices with an internet connection, can be tracked</li> <li>Give tourists a GPS tracking device to take with them throughout their trip.</li> <li>GPS incorporated in the rental cars, bicycles, boats can be used to know the roads and car parks mainly used to travel through a destination</li> </ol>	<ul style="list-style-type: none"> <li>The temporal and spatial itineraries to be ascertained</li> <li>The roads used to connect the places visited.</li> <li>Identify in which places the tourists spend a greater amount of time</li> <li>At which times certain places are more likely to be visited.</li> </ul>
Credit card spending	Analyse the spending made by tourists through their credit cards	<ul style="list-style-type: none"> <li>Where tourist consume</li> <li>Amount of money spent</li> </ul>
Internet search data	Scraping of different web pages Wikipedia, google trends, etc. Sentiment analysis of social media	<ul style="list-style-type: none"> <li>most visited tourist attractions of a destination are</li> <li>price of certain activities</li> <li>the type of clients to whom they are oriented</li> </ul>
Access fee payment data	Certain attractions have control systems that require tourists to pay an entrance fee to access them or use some type of registration system	<ul style="list-style-type: none"> <li>Revenues</li> <li>Number of tourists</li> <li>Price of entry</li> </ul>
Other techniques	Tourism intermediaries' data (Transport, accommodation and activities); Traffic cameras at border crossing controls.	



# **Key takeaways and questions**



# Key Final take-aways and next steps



- **Key Policy makers and implementers:** MINICOM, MINECOFIN, RDB, RCB, IREMBO
- **Key Private sector actors:** RCT, RHA, RTTA, RSGA, RCTA, RHTEA, Events Factory, Travel Zuri, Rwanda Air, Yego, Move, Airbnb, booking.com
- **Top priorities are:** Increasing revenue and number of tourist, job creation, MICE development, electronic payments and increase presence online.
- **Key Opportunities:**
  1. Increase online presence and general digitalisation of the sector and quantification of impact of that presence
  2. Enhanced linkages and coordination between entities to collect data
  3. Identify the main factors that have led to MICE expansion to replicate them, particularly for sports events
  4. Understand key expenditure activities for tourist across the value chain to focus efforts in those sectors
  5. Develop digital payments infrastructure, particularly to reach more remote areas
- **Most relevant data sets**
  1. Data gathered and in possession of **RDB, RCB, and NISR** on number, type and purposes of visitors, number of accommodations, expenditure per visitor, MICE data (type of events, number of visitors), park visits. Transactional data from BNR and communications data from RURA would also be desirable.
  2. Local and international digital platforms data: **Yego, Move, Airbnb, Booking.com** data on traveling patterns, preferred payments method, mean of transport and most demanded services.
  3. Data in possession of private actors: Air Rwanda, travel Zuri, Dreams factory,



**Schedule 1. Defining  
tourism units for data  
analysis – demand and  
supply perspective**



# **Defining tourism units for data analysis – demand perspective**



# Defining tourism – Demand Perspective 1/2

## UN Standards for Measuring Tourism. What are our base units?

### International Recommendations for Tourism Statistics (IRTS)(2008)

1. **Glossary of Tourism Terms in the IRTS** (The standards for measuring tourism include a full glossary of [tourism terms](#)):
  - **Tourism:** “social, cultural and economic phenomenon which entails the movement of people to countries or places outside their usual environment for personal or business/professional purposes. These people are called visitors (which may be either tourists or excursionists; residents or non-residents) and tourism has to do with their activities, some of which involve tourism expenditure”
  - **Tourism expenditure:** “Tourism expenditure refers to the amount paid for the acquisition of consumption goods and services, as well as valuables, for own use or to give away, for and during tourism trips. It includes expenditures by visitors themselves, as well as expenses that are paid for or reimbursed by others”
  - **Tourist (or overnight visitor):** “A visitor (domestic, inbound or outbound) is classified as a tourist (or overnight visitor), if his/her trip includes an overnight stay, or as a same-day visitor (or excursionist) otherwise (IRTS 2008, 2.13)”
  - **Travel/Traveller:** “Travel refers to the activity of travellers. A traveller is someone who moves between different geographic locations, for any purpose and any duration (IRTS 2008, 2.4). The visitor is a particular type of traveller and consequently tourism is a subset of travel. **Tourism** is a subset of **travel** and **visitors** are a subset of **travellers**”
  - **Visitor:** “a traveller taking a trip to a main destination outside his/her usual environment, for less than a year, for any main purpose (business, leisure or other personal purpose) other than to be employed by a resident entity in the country or place visited”

# Defining tourism – Demand Perspective 2/2

## UN Standards for Measuring Tourism. What are our base units?

- 1. Citizenship vs country of residence:** “although frequently used in migration statistics, the concept of citizenship is not part of the requirements or definitions of tourism statistics. **It is recommended that travellers (and visitors) be classified on the basis of their country of residence.**”
- 2. The main destination of a tourism trip:** “the place visited that is central to the decision to take the trip. However, if no such place can be identified by the visitor, the main destination is defined as the place where he/she spent most of his/her time during the trip.”
- 3. Employment vs tourism:** “Any trip by a traveller whose main purpose is to be employed by a resident entity in the country visited and receive compensation for the labour input provided should not be considered as a tourism trip **even though it is outside his/her usual environment and for less than 12 months.** Nevertheless, **if being employed and the payment received are only incidental to the trip,** the traveller would still be a visitor (and the trip would still qualify as a tourism trip).”

# **Defining tourism units for data analysis – supply perspective**





# Defining tourism – Supply perspective

## UN Standards for Measuring Tourism. What are our base units?

**Objective:** to describe the productive activities that provide the goods and services that visitors acquire.

### Which are the statistical units for which information is sought and data gathered?

1. Establishment (unit): “an enterprise, or part of an enterprise, that is situated in a single location and in which only a single productive activity is carried out or in which the principal productive activity accounts for most of the value added” (System of National Accounts 2008 para. 5.14).
  - Establishments that appeal to tourists frequently engage in multiple profitable endeavors. Whether they have more than one depends on whether it is possible to distinguish between their many outputs (from a statistical perspective). (E.g., Hotels that offer food services or manage convention centres, trains that provide food or sleeping facilities)
  - In tourism, irrespective of their form of organization, each of these entities should be considered as a separate establishment if it can provide the data required to calculate operating surplus.
  - In supply-side statistics, establishments are classified according to their main activity, which, in turn, is determined by the activity that generates the most value added

**Defining tourism units for  
data analysis - supply  
perspective -  
accommodation**



# Defining tourism – Supply perspective - Accommodation

## UN Standards for Measuring Tourism. What are our base units?

### Main Features

- The establishments must be appropriately classified to obtain the information required for analysing different segments of demand.
- Data collection on accommodation services allows to cross-classify with information on the types of destinations where the accommodation establishments are located (populations size, geographic characteristics or other characteristics: spa resorts, historical interest, etc.)
- For many countries, surveys of accommodation establishments are the most important short-term information source on supply as they are in general, rather quickly available.

### The variables most frequently used to describe the accommodation capacities:

- **Length of stay:** Dividing the number of nights spent by the number of arrivals
- **Months operating in the year;**
- **Number of rooms or accommodation units** (gross, net) (the net indicator takes into consideration the fact that rooms might not always be available for guest accommodation);
- **Number of bed places** (gross, net) (the net indicator takes into consideration the fact that bed places might not always be available for guest accommodation);
- **Occupancy rates** (gross, net) by rooms or accommodation units (an indicator to be associated with revenue per room); by (gross, net) by bed places (an indicator to be associated with flows of visitors);
- **Revenue per available room.**

**Defining tourism units for  
data analysis - supply  
perspective - food and  
beverage**



# Defining tourism – Supply perspective – Food and Beverage

## UN Standards for Measuring Tourism. What are our base units?

### Main Features

- Although considered tourism characteristic activities, establishments also cater to a large degree to non-visitors or local residents.
- It is important to classify visitors by type of accommodation (identifying separately non-market accommodation\*) as well as purpose of trip (identifying visiting family and friends) in order to be able to validate the amount of expenditure in food and beverage serving services by different categories of visitors.
- Different categories of establishments providing food and beverage services in each country should be identified: full-service restaurants with or without beverage service, sometimes referred to as fine dining, family restaurants with full service, self-service restaurants or cafeterias with seating, take-out or take-away establishments, stands or street vendors with fixed locations, bars, night clubs, etc.
- **The variables most frequently used to describe the accommodation capacities:**

For restaurants with seating	For take-out establishments	For bars and night-clubs
<ul style="list-style-type: none"><li>• Total number of clients that can be accommodated per serving;</li><li>• Number of tables;</li><li>• Number of seats;</li><li>• Number of meals that can be served daily;</li><li>• Number of meals served.</li></ul>	<ul style="list-style-type: none"><li>• Number of meals that can be served daily;</li><li>• Number of meals served.</li></ul>	<ul style="list-style-type: none"><li>• Number of customers;</li><li>• Number of drinks served</li></ul>

**Defining tourism units for  
data analysis - supply  
perspective -  
transportation**



# Defining tourism – Supply perspective – Passenger Transportation

UN Standards for Measuring Tourism. What are our base units?

## Main Features

- For analytical purposes, passenger transportation is usually considered under two different categories: **transportation to or from the destination**, and **transportation at the destination**.
  - This is important for international travel as the economy to benefit from the associated expenditure should be identified. (Which is the residence of the carrier?)
- Travel does not always entail the acquisition of a service provided by an organized provider of such services: on foot, on his/her own bicycle, using one's own means of transport (or a rented one).
- The characterisation of a trip by the main mode of transport used to arrive at the destination does not necessarily account for all the types of transportation used while on the trip that might need to be identified.

## Additional non-monetary information associated with the supply of transportation services:

Long distance public transportation	Rental of vehicles
<ul style="list-style-type: none"><li>• Number of vehicles for road transport/aircrafts, vessels, for air and water;</li><li>• Number of available seats;</li><li>• Number of passengers transported;</li><li>• Capacity utilization;</li><li>• Number of passenger-kilometres produced.</li></ul>	<ul style="list-style-type: none"><li>• Number of vehicles (cars, vans, caravans, boats, yachts, etc.) available for rent without operator;</li><li>• Number of vehicle-days available for rent in a given period (month, year);</li><li>• Number of vehicle-days actually rented.</li></ul>

# Defining tourism – Supply perspective – Travel agencies and other reservation activities

UN Standards for Measuring Tourism. What are our base units?

## Main Features

- Revenues of travel agencies on reservation services are of three kinds: (i) collected directly, (ii) commercial margins (buying to a lower price to which it is sold), and (iii) commissions paid by providers of tourism services
- Travel agencies and other reservation activities are viewed as selling a service directly to the visitor so that they can be considered as tourism industries.
- Consider that often the provider of the services and the provider of reservation services are not resident of the same economy

## Additional information to analyse:

Domestic Trips	International trips
<ul style="list-style-type: none"><li>• Trips without package;</li><li>• Domestic packages.</li></ul>	<ul style="list-style-type: none"><li>• Inbound trips without package;</li><li>• Outbound trips without package;</li><li>• Inbound package;</li><li>• Outbound package.</li></ul>



# Tour operators online

A search among the top ten tour operators in Rwanda

Tour operator	Countries where it operates	Where is the server hosted
<a href="#">Visit Rwanda</a>	Rwanda	London, United Kingdom
<a href="#">Shadows of Africa</a>	Tanzania, Zanzibar, Kenya, Rwanda, Uganda, South Africa, Zimbabwe, Ethiopia, Namibia	Ljubljana, Slovenia.
<a href="#">And beyond</a>	World wide	Toronto, Canada
<a href="#">Golden Rwanda Safaris</a>	Rwanda, Uganda, RDC, Tanzania, Kenya	Burlington, United States
<a href="#">Africa Tours Adventure</a>	Rwanda, Uganda , RDC	Burlington, United States
<a href="#">Countryside Tours Rwanda</a>	Rwanda	Ashburn, United States
<a href="#">Intrepid travel</a>	World wide	Amsterdam Netherlands

# Thank you

Victor Perez

## About Cenfri

international is a global think-tank and non-profit enterprise that bridges the gap between insights and impact in the financial sector. Cenfri's people are driven by a vision of a world where all people live their financial lives optimally to enhance welfare and grow the economy. Its core focus is on generating insights that can inform policymakers, market players and donors who seek to unlock development outcomes through inclusive financial services and the financial sector more broadly.

