



Tourism

by Benjamin Carey FTS, Managing Director, Dunira Strategy

TOURISM

Beyond Gorillas – Tourism Investment in Rwanda

SHE GOVERNMENT OF RWANDA understands the value of tourism and its performance is the envy of Africa. Genocide and pilgrimage are inevitably components of the product mix, but it has been many years since Rwanda emerged from conflict to become the 'must-see' destination that it is today.

Those that had visited or lived in the country before 1994 already knew that Rwanda is an extraordinary destination with breathtaking landscapes, remarkable people and wonderful food; they could

have predicted that tourism would eventually contribute to the nation's recovery, but few could have believed how quickly this would happen.

Tourism is Rwanda's top foreign exchange earner and the government's No.1 export priority.

In 2010, the government set out its Vision for 2020, which aimed over the next decade to increase tourism arrivals by 100% and to grow annual tourism revenue by 214%. It is already ahead of schedule!

The Rwanda Development Board (RDB), which had taken over responsibility for

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tourism from the Rwandan Office for Tourism and National Parks (ORPTN), recognised that the tourism sector was almost wholly dependent on gorilla tourism, which had become saturated. Despite applying precipitous increases in the price of gorilla trekking permits (now US\$750), they continued to sell out – and the RDB's highly responsible commitment to environmental protection and product quality meant that the number of permits available would not be increased.

Award-winning British consultancy Dunira Strategy was commissioned by RDB to produce a new tourism marketing strategy for Rwanda. The result was Beyond Gorillas. The research showed that the government's Vision was actually "not ambitious enough" and that an even higher level of tourism revenue could be achieved in 2020 by progressively increasing average visitor spend and extending tour duration. Such growth could be realised by developing new product clusters and penetrating new target markets. This meant implementation of a new marketing strategy, enhancement of RDB's capability and investment in new products.

In three years the number of hotel rooms has increased by 60% and the annual value of new investments in the tourism sector has grown by 176% to US\$324mn. During the same period, the number of tourist arrivals has increased by 65% and tourism revenue has increased by 61%, bucking every tourism trend in the world. But then Rwanda never has been a typical tourism destination.

Rwanda is renowned for gorilla trekking in the Virunga National Park, but it also has so much more to offer. Long distance walks along a thousand miles of paths across Rwanda's thousand hills. Fishing and kayaking on Lake Kivu. Birdwatching everywhere. Arts festivals and museums all over the country. There are some very luxurious hotels and resorts, which only the wealthiest visitors can afford, but these are often community-owned and the benefits stay locally. Nyungwe Forest, which only became a National Park in 2005, has just been named by National Geographic Traveler as one of the World's Top 10 Trips in 2014; although "chimps are the star attraction", it has the world's largest community of Colobus monkeys and it a birder's paradise with more than 300 species of bird.



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Meanwhile the phenomenal new Kigali Convention Center will make Rwanda the conference capital of East Africa.

Rwanda is fortunate not to have any of the security challenges faced by some of its neighbours and the UK Foreign Office affirms this by simply advising "vigilance" if travelling near the DRC border. You really can walk around cities and rural areas in the evening and be safe. Roads are generally well maintained. Immigration formalities on arrival at Kigali are a surprise for the most seasoned travellers, because everyone smiles and is helpful, even the taxi drivers! Rwandans are proud to share their country with visitors.

The UK is Rwanda's largest European market (26%) and it is growing, as are

all of Rwanda's target markets in Europe, North America, Asia and the Middle East. Its Commonwealth membership since 2009 has also enhanced its profile and reputation. Tourism is a key driver of economic growth and poverty alleviation in Rwanda. It is an amazing success story, and there is even more room to grow. The door is open to foreign investment, which will be critical to ensure Rwanda achieves its hugely ambitious but entirely realistic vision for tourism by 2020.

Dunira Strategy (www.dunira.com) is an award-winning tourism consultancy specialising in emerging markets. To discuss investment opportunities in Rwanda, please contact Benjamin Carey (benjamin@dunira.com). ■