



and extending tour duration. Such growth could be realised by developing new product clusters and penetrating new target markets. The Government of Rwanda understands the value of tourism and facilitates private enterprise. In three years hotel rooms have increased 60% and the value of new investments grown by 176% to £201m. During the same period, tourist arrivals increased by 65%. Tourism is Rwanda's top FX earner and the government's no.1 export priority.

Beyond gorilla trekking and genocide pilgrimage, Rwanda offers 1000 miles of long distance walks, fishing and kayaking on lakes and rivers, superlative birdwatching, trendy arts festivals, great restaurants, some truly luxurious hotels and a phenomenal convention centre. Much like Scotland!

In 2013 and 2014, Dunira won Green Apple Awards for projects in India and Somalia, which drew on previous work in Scotland developing tourism clusters and destination organisations. Just as travel is a universal need, so too are principles of sustainable tourism development, and lessons learned overseas are now being applied in Scotland.

Rwanda's success is amazing. India's ambition is remarkable. Tourism entrepreneurs that want to succeed invariably ignore strategies and don't wait for government initiatives. Instead they co-operate with others, because it makes business sense in a destination; and they communicate to establish customer networks, because it's cheaper than advertising. Scotland will undoubtedly meet its target, but this will be because the more supine businesses will be balanced by the feisty can-do entrepreneurs that stick their heads above the parapet and 'go beyond'.

Benjamin Carey FTS
Managing Director, Dunira Strategy

Vision through Ambition

Achieving sustainable tourism growth by going beyond.

With 1.1bn international tourists in 2013 worth £750bn, the UN World Tourism Organisation forecasts that the volume of world tourism will grow by 3.3% a year to reach 1.4bn by 2020 and the value by 76% a year to £1.2 trillion. Last year in Scotland tourism supported 10% of jobs and generated £4.6bn. The world's largest industry, tourism destinations can all learn from each other.

In 2012, three nations launched strategies for 2020. Some were more ambitious than others.

Scotland with 8.5m tourists from outside Scotland announced its target to grow visitor spend from £4.5bn (2012) to "between £5.5bn and £6.5bn by 2020"; described as "ambitious, yet realistic", the target represents annual growth averaging just 3.3%.

India, which receives 70m tourists a year, announced its ambition to gain 1% of world tourism (up from 0.64% share) by harnessing its "Go Beyond" campaign. India will need to grow its international tourism by 10.1% a year. Given that India achieved 155% growth in preceding decade with 9.8% annualised growth, this ambition is challenging, but realistic.

Rwanda published Vision 2020 in 2010, which aimed to increase arrivals by 100% and

grow revenue by 214%, but the government realised the tourism sector was almost entirely dependent on one product. Despite the high price (\$750/£465) of gorilla trekking permits, they always sell out and the product is saturated. They needed to refine their plan.

Award-winning Edinburgh consultancy Dunira Strategy was commissioned to produce a new strategy for Rwanda: Beyond Gorillas. Our research showed the Vision was 'not ambitious enough' and that a higher level of revenue could be achieved by progressively increasing average spend

