

DIVERSIFYING RWANDA'S TOURISM INDUSTRY:

A ROLE FOR DOMESTIC TOURISM



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Rwanda Tourism Background

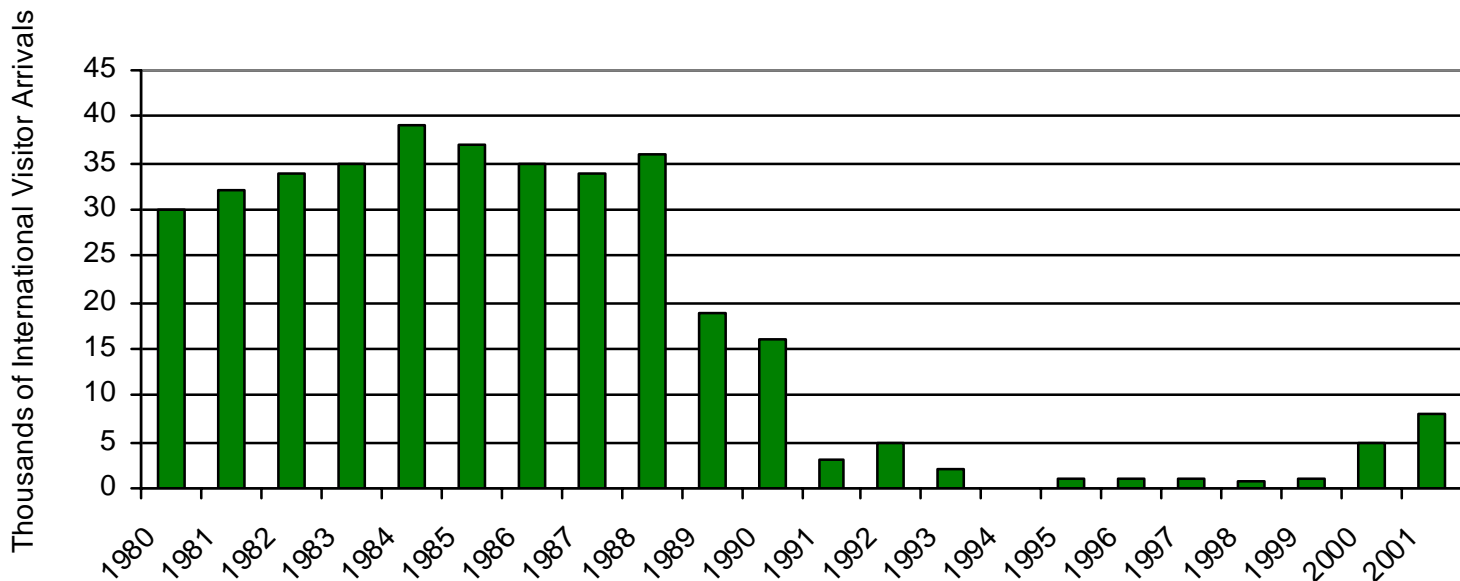
Historically Rwanda has been most famous for its natural attractions, namely its three National Parks

- Volcanoes National Park on the slopes of the Virunga mountain range, famous for the country's biggest attraction, the mountain gorillas;
- Akagera National Park, defined by its “archetypal African savannah landscape”;
- Nyungwe National Park, the largest single tract of montane forest in East and Central Africa with incredibly rich biodiversity

A hub for scientists, researchers and eco-travelers Rwanda reached its peak tourism year in 1984 with 39,000 visitor arrivals—10 years later, Rwanda witnessed one of the worst tragedies of our time, the 1994 genocide

- Continuous conflict in the region, international travel warnings and a persistent negative image has plagued the tourism industry

International Tourist Arrivals in Rwanda 1980-2001



Rwanda's National Tourism Strategy

In 2001, Rwanda's government hired OTF Group, an American-based economic development consulting firm to develop the industry's National Tourism Strategy

- Rwanda's National Tourism Strategy focuses on **lower visitor numbers and higher receipts** as its model for sustainable tourism in the country
- The goal of Rwanda's tourism industry is to reach **70,000 tourists and \$100M in receipts by 2010** through **high-end, low environmental impact** tourism initiatives
- While domestic tourism is included in the National Tourism Strategy, Rwanda's experiences are aimed at attracting mainly **three specific types of tourists:**

Eco-Tourists

Visitors who enjoy nature-based activities and are particularly interested in Rwanda's primates, animals and birds in the national parks

Specialized Circuit: *Primate Discovery Tour*

Explorers

Visitors who are interested in Rwanda's history and culture and who are desire to experience the *real* Rwanda

Specialized Circuit: *500 Years of Civilization Tour*

Individual Business Travelers

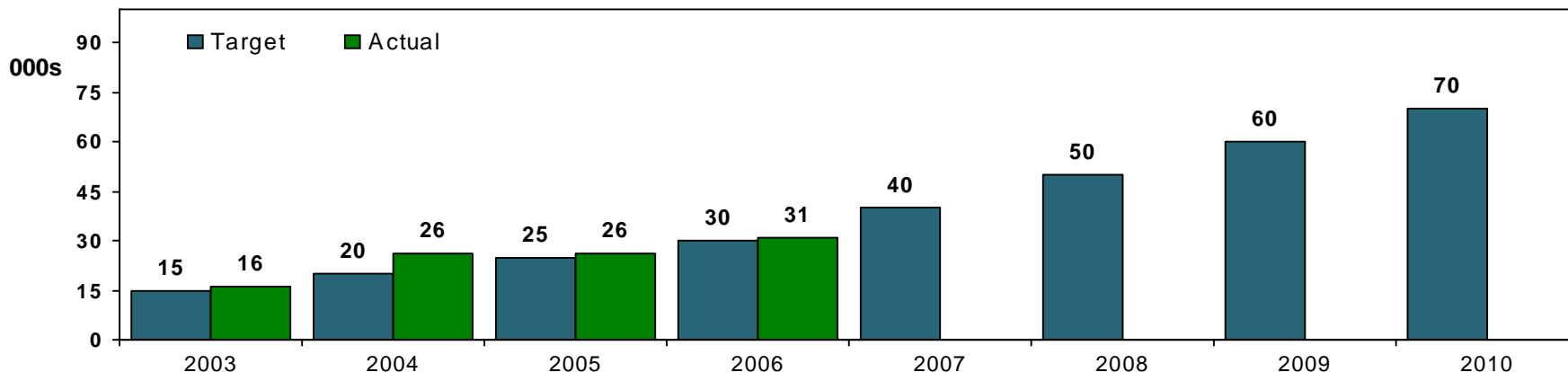
Visitors who come to Rwanda for events and conferences and briefly tour the country, as well as those seeking investment opportunities in the country

Specialized Experience: *Kigali City Tour*

Rwanda Tourism Development

The Strategy has led Rwanda tourism to meet and surpass many of its targets, evidenced particularly by growing visitor numbers and revenues

Rwanda Tourism Visitor Numbers (2003-2010)



Revenue (in million US\$)

	2003	2004	2005	2006	2007	2008	2009	2010
Target	9	13	22	31	42	55	75	99.9
Actual	N/A	17	26	33				

- Rwanda tourism has been exceeding targets with tourism receipts expected to double from 2005 to 2008
- Key investments in accommodation and unique products will contribute to the growth and sustainability of the industry
- Rwanda is focused on diversifying its current tourism product and emphasizing the greater promotion of domestic tourism in Rwanda

Rwanda Tourism & Economic Development

As a nation emerging from genocide and war, Rwanda is determined to rebuild itself economically, socially and politically.

This effort has led to tourism becoming one of the three pillars of Rwanda's economy

- To realize its Vision 2020 goal of increasing GDP per capita from \$250 to \$900 between 2000 and 2020, Rwanda needs to transform its economy from an agro-based economy to a human resource productivity-led economy
- For Rwanda, tourism represents a job-intensive, locally consumed export which will bring quality jobs and foreign currencies to a large proportion of Rwandans, along with other benefits such as creating a better image for Rwanda, generating public awareness of the industry and encouraging Private-Public Sector partnerships

While the industry is succeeding, and while perceptions of the country as a destination are improving, the volatility of the Great Lakes Region threatens the sustainability of the industry

- An over-reliance on international visitors and on Rwanda's main product, the famous mountain gorillas, also poses a threat to the industry's long-term success

The development of a domestic tourism industry, as has been demonstrated in other countries, offers the opportunity to generate a more diverse and economically sustainable tourism industry.

Domestic Tourism in Rwanda

Rwanda has much to gain from the promotion of domestic tourism, not only because of contributions to the tourism industry and the national economy, but also for what it can mean to individual Rwandans

National Pride

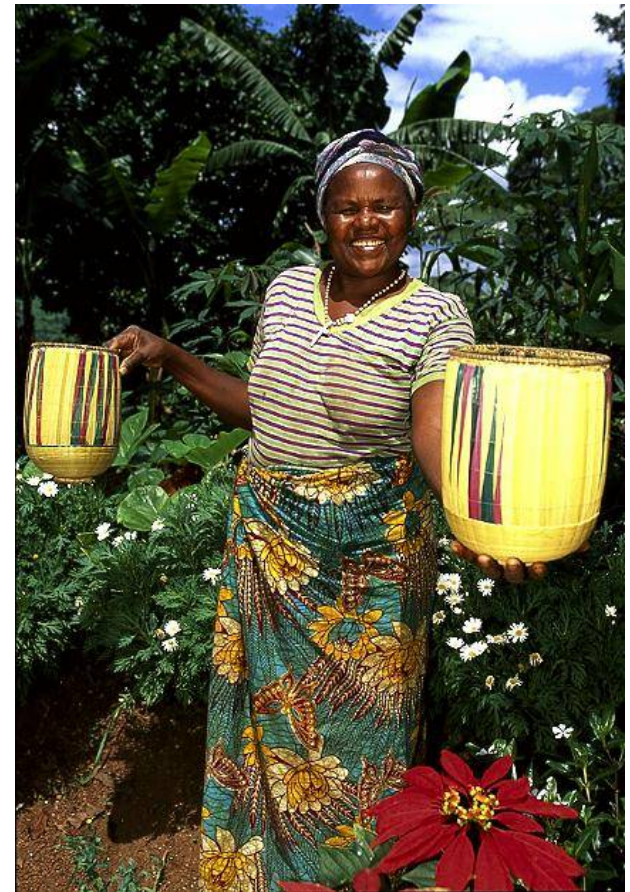
- Touring and re-discovering country increases national awareness and pride
- Rwandans able to see economic and social impacts, therefore contribute more

Job creation and Local Economic Development

- Promotion of non-five-star hotels and restaurants
- Secured steady business throughout the year, creating a more consistent market

Expanding Rwanda Tourism Initiatives

- Encouraging local investments in tourism and creating more jobs
- Protecting local historical and cultural assets, encouraging them to develop into tourist-generating sites
- Building new products and experiences



Domestic Tourism in Rwanda

With several categories to consider when developing domestic tourism programs, various promotional methods for the different categories are being initiated or are already being carried out

Domestic Tourist Categories

➤ Rwandan nationals

➤ Rwanda's expatriate population

➤ Rwandan Diaspora

Promotional Methods

- Radio programs (52% of the population owns a radio), televised events, promotional opportunities
- Continued support of national events such as the Mountain Gorilla Rally and the Peace Marathon
- Continued community participation in the Annual Gorilla Naming Ceremony

- Promotional material distributed at embassies
- Discounted offers similar to those for nationals on key tourism products (ex. reduced park entry fees)

- Participation by ORTPN and private sector in international tourism events
- Presentations of tourism experiences and investment opportunities at Diaspora conventions
- Promotional materials distributed at embassies

Domestic Tourism in Rwanda

Several constraints exist in the development of domestic tourism in Rwanda, however there are methods being developed within the industry to address these issues

Constraints

- *Rwanda is a poor nation, limiting the ways domestic tourists can contribute to the growth of the tourism economy*
- *Rwanda tourism is “quite a young industry” and international tourism has taken priority*
- *Rwandans view travel for leisure as an activity reserved for foreigners*

Potential of Domestic Tourism

- With 90% of the nation’s poor living in rural areas, many surrounding the national parks, the most vulnerable members of society have begun to **participate in tourism as guides, artisans and small business owners**; domestic tourists support such business as they travel
- “Unexpected participation” of domestic tourists since 2004 [in particular the 40% of all tourists to Akagera National Park being domestic tourists] has shown a natural incline of Rwandans desiring to tour the country; deliberate **initiatives by tour operators** will help to maintain this growth
- **Dedicated campaigns and promotion by ORTPN** through public relations efforts directed specifically at domestic tourists, will encourage participation in the industry

Successful Initiatives

As Rwanda strives to develop a diverse industry, the Rwanda Office for Tourism and National Parks (ORTPN) has initiated specific projects designed to promote domestic tourism in Rwanda

New Initiatives

- Kigali City Tour highlighting historical and cultural sites, geared towards domestic tourists and business travelers



Education Programs

- Targeted tourism awareness campaign for Rwandan school children; 1300 children visited the national parks within a year;
- Petition to the Ministry of Education to include tourism and conservation-related education in schools
- Petition for financial support to help sustain the existing training schools;



Public-Private Partnership

- Partnerships with both the government and the private sector formed to encourage the distribution of tourism information to the population

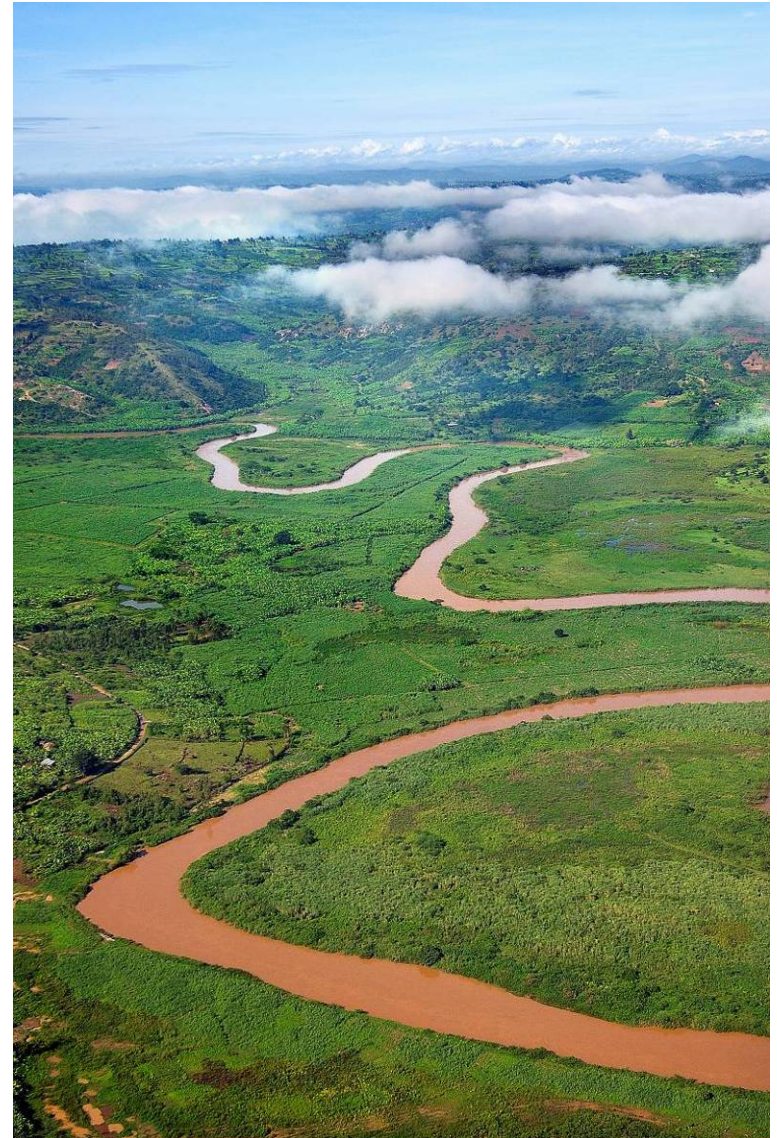
Events and Fundraisers

- Annual cultural exhibits, fundraisers to refurbish historical sites and promotional events
- Distribution of tourism information and promotional material directed at domestic tourists;
- Support of local annual sporting events to gain recognition for tourism—ex. Kigali Peace Marathon and the Mountain Gorilla Rally
- ORTPN's Annual Gorilla Naming Ceremony, '*Kwita Izina*' conducted with local communities, promoted over local radio stations, & televised to introduce public to Rwanda's most important tourism asset—the mountain gorilla



Conclusion

- ORTPN's initiatives, and those promoted by Rwanda's private sector the beginning of Rwanda's domestic tourism drive
- Several factors are still needed, however, in order for Rwanda tourism to fully capture its domestic tourism market:
 - Statistics regarding the potential for and the number of domestic tourists currently traveling in the country
 - Increase in tourism experiences designed specifically for domestic tourists
 - More concrete national surveys designed to better understand the domestic tourism market and needs





Thank You

Murakoze