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ESCAPE TO NYUNGWE: MARKETING AND PROMOTION STRATEGY AND ACTION PLAN FOR NYUNGWE NATIONAL PARK

FINAL REPORT



January 2013

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ESCAPE TO NYUNGWE: MARKETING AND PROMOTION STRATEGY AND ACTION PLAN FOR NYUNGWE NATIONAL PARK

FINAL REPORT

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ABBREVIATIONS

ATA	Africa Travel Association
ECA	Economic Commission for Africa
EMMITT	East Mediterranean International Tourism and Travel Fair
ITTFA	International Tourism Trade Fair Association
NN	Nyungwe Nziza
NNP	Nyungwe National park
NTA	National Tour Association
RDB	Rwanda Development Board
RTTA	Rwanda Tours and Travel Association
UNWTO	United Nations World Travel Organization
WTM	World Travel Market

I. Executive Summary

A. Background

Rwanda is an emerging tourist destination, and USAID's Nyungwe Nziza project seeks to help the country reach its tourism potential. To do so, the project targets the spectacular and protected Nyungwe National Park (NNP), focusing on inclusive ecotourism development for the benefit of local communities surrounding the park, and leveraging private sector investment in the management, construction, and maintenance of new and existing park infrastructure.

USAID's Nyungwe Nziza project is working to transform NNP into a viable ecotourism destination, capable of generating employment and sustainable and equitable income for local communities and other stakeholders, thus providing economic incentives to conserve the rich biodiversity of the Park. The ultimate goal is a thriving economy in NNP with engaged communities and a private sector that realize they can benefit economically by protecting and leveraging the unique environment in which they live and work.

Nyungwe is currently marketed and promoted as an add-on product to the gorillas by the majority of tour operators. Given the recent increase in the gorilla permit price, tour operators are concerned that they might have to sacrifice Nyungwe add-ons in an effort to make their 'primate packages' more affordable to their clients. As of the end of October 2012, it was not clear whether this was happening. Gorilla permit sales had not declined, although Nyungwe activity sales appeared to have declined since April 2012, but the reasons were unknown and the data uncertain.¹ One thing is certain, no more than 80 gorilla permits can be sold each day, thus a maximum of 29,200 a year.

To help diversify Rwanda's tourism sector beyond the gorilla permit limit, **Nyungwe National Park was identified as a priority target for diversification and as a possible stand-alone destination.**

To help address this challenge and in following the Year 3 work plan of the Project, Nyungwe Nziza is working with the Rwanda Development Board (RDB) to build on and implement the

¹ Based on raw data from RDB, which according to RDB Tourism Research Officer, Joel Rudasingwa, may be inaccurate due to data recording problems.

below strategy and plan to help market and promote Nyungwe National Park as an iconic escape – an **Escape to Nyungwe** -- independent from the already famous mountain gorillas.

This work builds on the foundation work for the website and tourism market profiles conducted in September-October 2010, March-August 2011, and January-present, thus supporting the rollout of both off- and online marketing strategies. Included in this strategy is the strengthening of the technology for web-based and social media solutions to facilitate posting of photos and videos, documents by both staff and fans of NNP.

B. Purpose & Objectives

The purpose of this report is to provide an analysis and plan for marketing Nyungwe National Park. The plan targets selected geographic generating markets and segments based on demographics and activity interests.

The objectives are to: 1) analyze constraints and opportunities in making Nyungwe a standalone destination; and 2) develop a marketing strategy and plan that maximizes awareness and marketing efforts for NNP.

The strategy is intended as reinforcement of an add-on to the national level tourism marketing strategy that was under review as of August 2012. This strategy will:

- Maximize exposure of NNP among international media and outbound tour operators who specialize in covering or selling wildlife and/or adventure packages in East Africa;
- Widen and expand NNP's market base in the main niche markets (UK, US, Germany and Netherlands);
- Increase consumer and trade awareness of NNP's biodiversity-based products in the US, UK, Germany and Netherlands markets;
- Increase availability of NNP's multimedia content in the public sphere.

The complete Statement of Work for developing the report is found in Appendix B.

C. Methodology

Drawing on previous NNP market and related studies and the results of the price optimization study, the marketing strategy and plan applies the results of a thorough market analysis to maximize awareness and marketing efforts for NNP's key market segments: top-end vacationers, bird watchers, eco-tourists interested in hiking and primate tourism.

Discussions were conducted with RDB marketing staff, Nyungwe National Park staff, and hotel staff and managers. Follow-up interviews were conducted with tour operators by phone and email.

A list of persons contacted is provided in Appendix C.

D. Key Findings

Based on the current tourism situation and existing markets for Nyungwe, as well as the constraints and opportunities analyzed below for marketing Nyungwe, it is the consultant's opinion that, **Nyungwe National Park cannot currently be marketed as a stand-alone destination**. However, **Nyungwe might become a stand-alone destination** for its main market segments if it is presented and positioned as an escape – an **Escape to Nyungwe**.

1. Current Situation: Who, When and What?

Apart from relatively small numbers of visitors who come to Nyungwe for the birds or a challenging trek, most visitors come to Nyungwe because it is an escape – an escape to a luxurious eco-resort or an escape to nature. Chimps, trail hikes, the Canopy Walk and the Nyungwe Forest Lodge are draws, but they are not sufficiently compelling for Nyungwe to compete yet as a stand-alone destination.

In 2011, Nyungwe sold 8274 activities, which was an increase of 44% over 2010, especially due to the opening of the Canopy Walk in October 2010. The opening of the high-end Nyungwe Forest Lodge also contributed to increased sales. Provisional data from RDB, as of October 2012, indicated sales declines since April 2012, but the accuracy of the data was uncertain.

Sixty five per cent of the activities were sold to foreign visitors (65%) with 20% of the sales to Rwandans and about 15% to foreign residents. Some of the world's top tourism spending countries generated most of these sales: the US, UK, Belgium, Canada, and Germany. Tour operators interviewed for this plan are also targeting Australia, China, Japan, South Korea and Turkey.

Most of these sales were concentrated in the summer months from June to September, thus also producing high occupancy rates for the three main accommodations near the Park – Nyungwe Forest Lodge, the Nyungwe Top View Hill Hotel and the Gisakura Guesthouse. The rest of the year visitor levels and occupancy rates were less than half of the summer months.

To overcome the seasonality challenge and work towards leveraging the **Escape to Nyungwe** concept, below is a targeted marketing action plan based on an analysis of constraints and opportunities. The plan focuses on moving Nyungwe towards becoming a stand-alone destination by marketing to the key high spending tourism markets mentioned above and encouraging selected product enhancements.

E. Constraints and Opportunities

To make **Escape to Nyungwe** a reality and work towards making Nyungwe National Park a stand-alone destination, addressing the following external and internal constraints and leveraging possible opportunities would be helpful:

1. External Constraints and Opportunities

- a. *Declining or slow economic growth in key generating markets, especially Europe and North America.* Activity sales continued to increase in Nyungwe since the economic downturn in 2008, but this cannot be assumed for the future. Travelers are more sensitive to value for price now and receptive to discounted offers, which could be an opportunity for Nyungwe. In addition, other markets such as China, India and others are emerging and being explored by local tour operators as possible generating markets.
- b. *Competition from neighboring destinations and others farther afield, which offer similar tourism products.* Foreign travelers to East Africa often select multi-country regional tour packages, especially to Kenya and Tanzania and increasingly Uganda. Rwanda is also included in some of these packages, but more marketing among tour operators is needed to expand this. Easier access to information and bookings is enabling travelers to choose from many “escapes” around the world, i.e. Latin America and South East Asia. Nyungwe’s competitive advantages with the beauty of the forest and primate experiences can be leveraged into more alluring and competitive escapes.

2. Internal Constraints and Opportunities

Marketing Nyungwe as a stand-alone destination is faced with two main sets of possible constraints, which might be leveraged as opportunities: 1) Marketing and Product and 2) Human Resources.

On Marketing and Product, the main constraints for tour operators were limited upper and middle range accommodation availability in the summer months and walks for non-hikers. Beyond the summer, an excess of rooms and activities was available, which could be packaged as discounted **Escape to Nyungwe** packages. The tour operators also cited the poor camping facilities and high prices as a constraint to expanding that market, one which at least one operator felt could be easily expanded. Research from the US-based Outdoor Industry Association supports this showing 5 per cent annual growth from 2005 to 2011 in the “outdoor recreation economy” (in the US).

The second major constraint is human resources, namely the marketing capacity of the Rwanda Development Board’s Tourism Department. Their staff is spread too thinly over many tasks, which makes it challenging to be proactive. Perhaps a focus on a plan based on **Escape to Nyungwe** could help not only with Nyungwe, but all of their marketing.

F. Marketing Action Plan and Strategies

To reach the key generating markets, the plan focuses on **targeting the industry (tour operators), online and offline media, Nyungwe social media “channels,” and some suggested partnerships** with the **Escape to Nyungwe** concept and tour operator driven packages.

A top priority is to get Nyungwe and **Escape to Nyungwe** offers into the offer catalogues of tour operators and on the lists of recommended destinations of travel agencies in Europe, North America, Australia, India and China. To reach the foreign operators, the marketing focuses on:

- Selected trade fair participation;
- Media outreach to travel trade and consumer publications;
- E-marketing.

For maximizing media exposure, the plan especially focuses on online marketing, social media and word-of-mouth marketing.

RDB is at the center of implementation, although their marketing department is currently short-staffed and lacking key roles such as staffers dedicated to trade fairs, online marketing and media relations.

Several potential partnerships are also suggested with private sector businesses and associations, nongovernmental organizations and educational institutions.

Lastly, the Action Plan describes some of the necessary next steps, including tactics and implementation responsibilities. It corresponds to the Market Targets and key strategies for reaching these targets. A Travel Fair Calendar of Actions is also included below.

Through implementation of the Plan, **Escape to Nyungwe** offers will attract growing numbers of visitors and increased spending to the region and thus help move Nyungwe towards becoming a stand-alone destination.

II. Key Findings: Current Situation, Market Analysis, Constraints, and Opportunities

A. Current Situation and Market Analysis of Tourism in Nyungwe National Park

Most of Rwanda's leisure tourism has been based on gorilla tracking, but the maximum number of permits that can be issued is 80 a day, thus 29,200 a year. The key challenge now for Rwandan tourism is how to diversify beyond gorillas and attract more tourism spending and investment to the country. The RDB has identified several sights and attractions around the country that are helping to achieve diversification. **Nyungwe National Park is one of the tourism development destinations identified as a priority for diversification and as a possible stand-alone destination.**

Currently, Nyungwe is attracting diverse market segments from wealthy Hollywood stars and producers who are attracted by the seclusion of the Nyungwe Forest Lodge to nature loving eco-tourists and low budget adventure-seeking backpackers who stay at the Nyungwe Top View Hill Hotel or the Gisakura Guesthouse. Nyungwe offers an escape for every type of visitor. Does this mean that Nyungwe offers enough to be a main reason for a visit to Rwanda? Can an "Escape to Nyungwe" be marketed as a stand-alone offer?

To address this question, the current tourism market for Nyungwe is reviewed and analyzed below based on the following:

- Nyungwe activities sold in 2011-12.
- Who is buying these activities?
- When and what are they buying?
- Constraints and opportunities for growing Nyungwe as a stand-alone destination.

Gorilla permit price increase impact on Nyungwe

At the time of writing, the tour operators were being asked to respond to the increase in price in visiting the gorillas (from \$500 to \$750 for foreign visitors). Although some operators were reportedly claiming that there would be a negative impact on their marketing of Nyungwe, it was not clear yet whether that will really happen. As of the end of October 2012, it was unclear whether gorilla visits had declined, because visitors may have been using passes purchased at the lower price which was available for purchase for visits after June 2012.

1. Nyungwe Activities Sold

Until 2012, according to RDB statistics, Nyungwe National Park was selling a growing number of activities. As Figure 2 shows, sales of visitor activities were increasing steadily over the past decade with substantial increases from 2009 to 2010 and 2010 to 2011 due especially to the opening of the canopy walk. However, declines in the number of activities sold were reported from October to December 2011 and April to September 2012, compared with the same months in 2010 and 2011 (see Figure 3).²

[Note: RDB records only the total number of activities sold in the Parks, not the total number of visitors. Based on discussions with tour operators, RDB Park staff and park visitors, most visitors to Nyungwe will buy more than one activity, but the data as to how many visitors bought more than one activity was unavailable at the time of writing.]

² The statistics used in this section come from the RDB's publication "Highlights on National Parks Visitation in Rwanda – January-December 2011," which was provided at the end of August 2011. Monthly figures for 2012 are based on raw data provided by the Rwanda Development Board Tourism Department in October 2012.

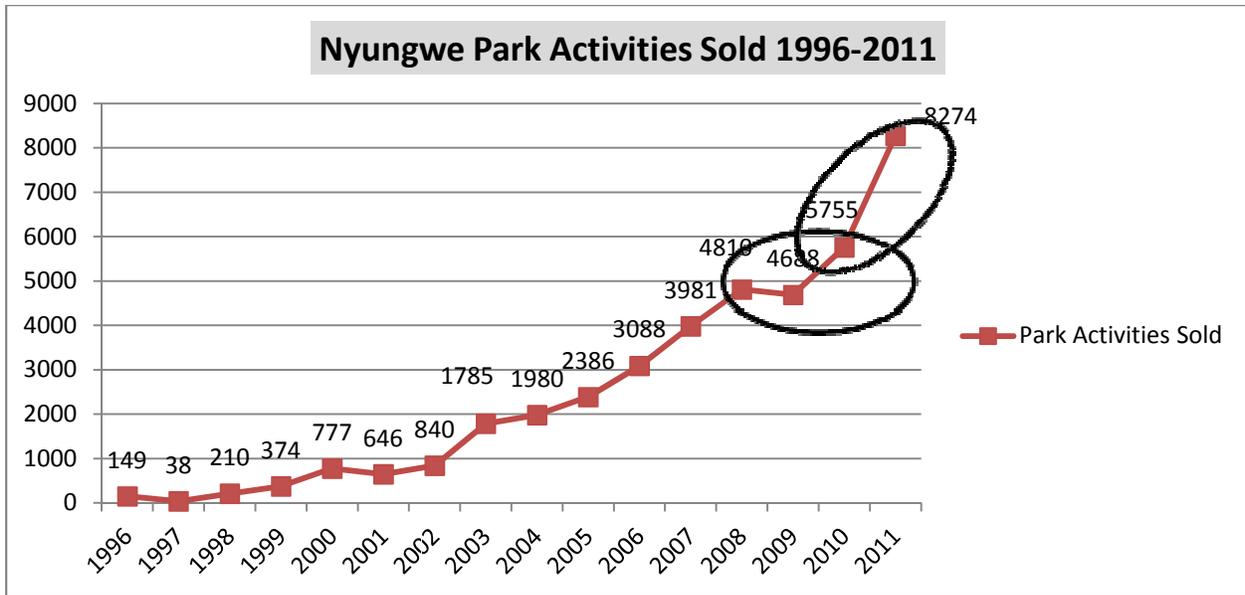


Figure 1: Nyungwe Park Activities Sold 1996-2011

Source: Tourism Department, Rwanda Development Board, 2011

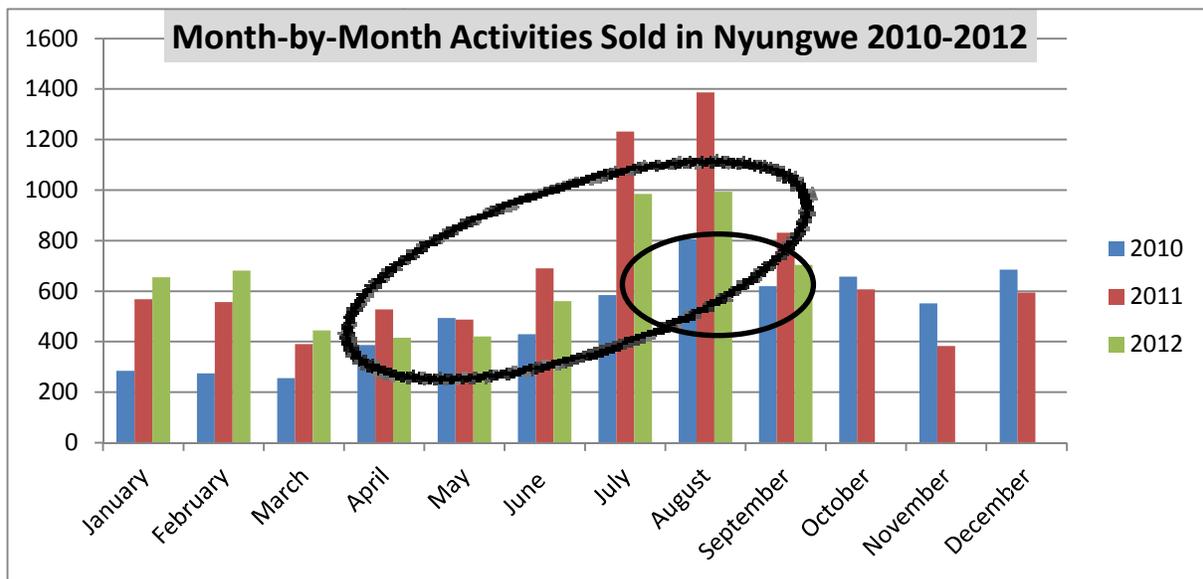


Figure 2: Month-by-Month Activities Sold in Nyungwe 2010-2012

Source: Tourism Department, Rwanda Development Board, 2011

The increased activity sales in 2010 and 2011 were primarily due to the opening of the Canopy Walk in October 2010 and increased interest in the Primate activities. By the end of 2010, 602 Canopy Walk visits were sold, which comprised 10.5% of all activities sold. And **by the end of 2011, 2315 Canopy Walk visits had been sold, which amounted to 29% of all activities sold.**

From 2010 to 2011, the sale of primate activities increased by 32% from 1927 to 2556 sales, which was 30% of all activities sold.

2. Escape to Nyungwe: Who, When and What?

a. Who is buying?

As mentioned previously, 8274 activities were sold in 2011 with **65% sold to foreign visitors, almost 20% sold to Rwandans** and **just over 15% sold to foreign residents** of Rwanda (see Table 2).

Table 1: 2011 Park activities undertaken in NNP by visitor category

RWANDANS		FOREIGN RESIDENTS OF RWANDA		FOREIGN VISITS		TOTAL VISITS	
Number	%	Number	%	Number	%	Number	%
1,639	19.8	1,266	15.3	5,369	64.9	8,274	100

Source: Department of Tourism, Rwanda Development Board, 2012)

Based on RDB's 2011 tourism statistics past trends, among the foreign visitors to Rwanda's parks, the top six nationalities have been dominated by the **United States, accounting for nearly 30%, followed by the United Kingdom, Belgium, Canada, Germany, and India.** Nationality data for activities sold in Nyungwe was not available from RDB, although as the tour operators suggested below, just experiencing the forest is especially popular with their American and Belgian clients.

In their September 2012 Tourism Barometer, the United Nations World Trade Organization (UNWTO) ranks all of these generating countries, apart from India, as top ranking tourism spenders: #1 Germany, #2 US, #4 UK, #6 Canada, and #11 Belgium.

The four tour operators who were interviewed for this report – Primate Safaris, Amahoro Tours, Eagle Ride and Bizdanny Tours – also identified a few other markets as priorities for their businesses. Amahoro is trying to target more Japanese visitors; for Primate, the Australian market has been growing; Bizdanny is also targeting Australia, as well as Turkey, China and South Korea.

Although RDB did not have data on the nationalities of the visitors who were buying the activities mentioned below, the consultant compiled the following table of visitor types based

on interviews with Park officials, RDB tourism officials and the managers of the Lodge, the Top View Hotel and the Gisakura guesthouse.

Table 2: Source Markets and Traveler Types

GEOGRAPHICAL SOURCE MARKET	TRAVELER TYPES	ACTIVITY INTERESTS IN NYUNGWE
Rwanda	<ol style="list-style-type: none"> 1) Higher income Rwandans 2) Expats residing in Rwanda 	<ol style="list-style-type: none"> 1) Relaxing at the Forest Lodge 2) Canopy Walk 3) Chimp Tracking 4) Waterfall trail 5) Possibly an additional hike
Neighboring countries	<ol style="list-style-type: none"> 1) Expats residing in neighboring countries 	Similar activities
Global	<ol style="list-style-type: none"> 1) Business travelers, higher spending 	Similar activities, but limited to weekend
European, North American, Australian	<ol style="list-style-type: none"> 1) Touring via operator, often on multi-country itineraries 2) Younger more active oriented camping/hiking tours 3) Independent backpacking travelers, lower budget 	<ol style="list-style-type: none"> 1) Similar activities plus bird watching especially for UK 2) All of above except relaxing, also possibly additional hikes, including the Congo-Nile Trail. 3) Similar to younger tour segment.
Indian, Chinese, other Asian	<ol style="list-style-type: none"> 1) Touring via operator 	<ol style="list-style-type: none"> 1) Similar activities 2) Cultural tourism, if accessible

As mentioned above, these are diverse market segments, which are attracted to Nyungwe for different reasons – some just to relax at the Nyungwe Forest Lodge, others opting for a sunrise search for chimps or birds and others looking for a challenging mini-adventure. For all of these segments, however, a visit to Nyungwe could indeed represent an “Escape,” a break from the usual -- an **“Escape to Nyungwe.”**

b. When are visitors buying their “Escapes”?

As Table 3 shows, 2639 activities (32% of the total) were sold in the Park in July and August and 71% of those activities were sold to foreign visitors. **In fact, foreign visitors’ purchases of activities outnumbered Rwandan and foreign resident visitors every month of 2011, except September. From June to August, foreign visitors bought at least twice as many activities as Rwandans and foreign residents.**

Table 3: 2011 Park activities undertaken by month and by visitor category

MONTH	RWANDANS	FOREIGN RESIDENTS OF RWANDA	FOREIGN VISITS	TOTAL VISITS
Jan	151	63	362	576
Feb	62	146	348	556
Mar	42	79	266	387
Apr	53	144	331	528
May	50	115	323	488
June	93	67	530	690
July	120	207	926	1253
Aug	305	137	944	1386
Sept	387	56	388	831
Oct	162	112	327	601
Nov	52	63	266	381
Dec	162	77	358	597
TOTAL	1,639	1,266	5,369	8,274

Source: Department of Tourism, Rwanda Development Board, 2012.

The 14 Rwandan tour operators that offer Nyungwe were contacted for feedback on marketing Nyungwe in general and as a stand-alone destination. The four operators who were interviewed reconfirmed that most of their sales are in the summer months, which is not surprising given holiday schedules.

2011 Monthly Activity Sales

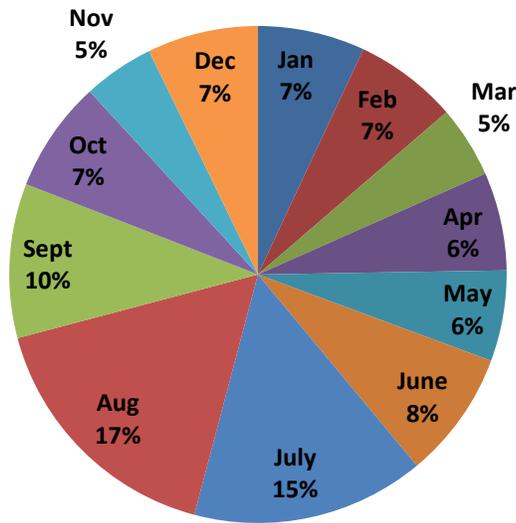


Figure 3: Monthly Activity Sales

Source: RDB Tourism

As Figure 4 shows, **at least 50%** of the activity sales occurred from June to September. And, not surprisingly, for the main accommodations near the Park -- the Nyungwe Top View Hill Hotel and the Nyungwe Forest Lodge – their highest occupancy levels also occur during these months with claims ranging from 55 to 65 per cent occupancy. In August, the Lodge claimed nearly full occupancy. The rest of the year, both of these hotels are less than half-full. The occupancy rates for the Gisakura Guesthouse could not be obtained. According to Nyungwe’s Tourism Warden, Ildephonse Kambogo, the Guesthouse did not maintain sufficient records to provide occupancy rates, but a safe assumption was less than 50% occupancy most of the year.

From **October to May monthly activity sales average between half and a third of the June to September period**, thus pointing to a seasonality issue and, as discussed below, an opportunity.

With the two main tourist class places to stay – the Lodge and Top View, additional visitors could easily be accommodated all year, except for August at the Lodge. Constraints other than capacity exist for growing the market, which are discussed below.

c. What are visitors buying?

In 2011, as Table 4 shows, the top activities bought by these visitors were hiking on the trails (especially the waterfall trail), primate tracking and the canopy walk.

Table 4: Top Activities bought by Visitors in 2011

ACTIVITY	NUMBER	% of Total Activity Sales
Hiking on the trails	2869	35%
Primate tracking	2556	31%
Canopy walk	2315	28%
Camping	320	4%
Birding	214	2.5%

Source: Department of Tourism, Rwanda Development Board, 2012.

The four tour operators who responded to the consultant's requests— Primate Safaris, Amahoro Tours, Eagle Ride, and Bizdanny Tours – reconfirmed the above list of activities based on their clients' requests and purchases. A key piece of related data that would be helpful to have is what percentage of activities sold are from visitors brought to the Park by tour operators. Three of the four operators said that the cost of activities is not included with their overall tour prices, in order to give their clients more choices.

For Primate Safaris and Amahoro Tours, chimp tracking is the most important activity for their clients. The waterfall trail is also popular followed by the canopy walk. However, none of the four ranked the latter as a top priority. In fact, for Primate Safaris, client feedback for the canopy walk has not been positive: "You see absolutely nothing... [the walk] doesn't really lead to seeing things." Amahoro Tours has received some complaints about the price of the canopy walk. And some Eagle Ride clients were afraid of going on the canopy walk.

Also important for all four operators was just the ecotourism experience of walking into the forest perhaps, just a simple well-guided nature walk. For Primate Safaris clients, the ecotourism experience was popular with American clients and for Eagle Ride with their Belgian clients.

Primate Safaris also emphasized the need for more afternoon activities such as cultural tourism. Their clients usually do the chimp tracking or waterfall trail in the mornings, but then have nothing to do in the afternoons. For Primate Safaris, if the cultural tourism offers were more

developed and, in the case of Banda, an improved road offering easier access were available, these could be sold to their clients.

At the World Travel Market in November 2012, the consultant also discussed marketing and promotion of Nyungwe National Park with Manzi Kayihura, CEO of Thousand Hills Expeditions and President of the Rwanda Tour and Travel Association, Praveen Moman, CEO of Volcanoes Safaris and Lodges, and David Mugisha, Director General of Wildlife Tours – Rwanda. All three emphasized the importance of a proactive marketing and promotion plan, especially for Nyungwe National Park in order to strengthen its position as an internationally attractive destination.

As Table 4 also shows, camping and birding have been the least popular activities sold in Nyungwe. An average of only five camping “activities” was sold per week in 2011. While the campground site at Uwinka is nicely situated in the forest near the Uwinka Visitor Center, the facilities were sub-standard, the prices far too high and no shop or café nearby for food and bottled water. When the consultant visited in August 2012, the bathroom and shower were dirty and no covered picnic area existed. The rondavel covering the picnic area had burnt down and not yet been replaced. In 2011, the camping earned at least US\$11,200 (320xUS\$35), which is certainly enough to replace the rondavel, improve the facilities and perhaps open a café and/or sell a few staples. With a lack of clean facilities and supplies, at US\$35-50 a night per person, the camping is over-priced. For almost the same price, a camper could stay overnight at the Gisakura guesthouse.

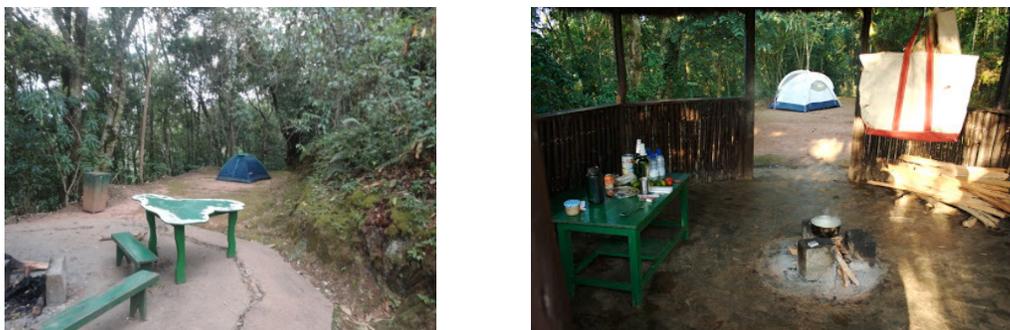


Figure 4: Uwinka Campsite in August 2012 (l) and August 2007 (r)

Sources: Photo on the left is by the consultant. Photo on the right comes from traveler Richard Fleming’s blog at: <http://bit.ly/z3UjSy>.

Again, in Table 4, birding is the least popular activity sold comprising only 2.5% of all sales, despite world-class bird watching opportunities and the global popularity of birding.³ According to bird-watching experts such as those contributing to the Bulletin of the UK-based African Birding Club, Nyungwe is considered one of Africa’s top destinations – “Nyungwe National Park is the undoubted jewel in the crown...one of the largest mountain forests in Africa...one of Africa’s best forests for birding”, (Vol. 17, September, 2010).

B. Constraints and Opportunities: Future Growth of Nyungwe as a Stand Alone Destination

Marketing and promotion are critical to establishing and strengthening destinations. Successful destinations on every continent – ones that achieved sustainable growth in tourism receipts, tourism-generated employment and business opportunities, and preservation of their natural and cultural heritage – have succeeded, in part, through meaningful investments in marketing and promotion. However, they first succeeded by addressing a number of constraints and then leveraging marketable opportunities into sustainable destination development. Nyungwe offers a number of opportunities to become a sustainable, perhaps stand-alone, destination, but addressing some of the following external and internal constraints would help achieve this.

1. External Constraints and Opportunities

In 2012, as mentioned above, Nyungwe experienced serious declines in the sale of activities. The reasons for these declines have not yet been fully analyzed, but based on similar declines experienced in other destinations, the following external constraints might be possible causes:

- 1) Declining or slow economic growth in key generating markets, especially Europe and North America; and
- 2) Competition from neighboring destinations and others farther afield, which offer similar tourism products.

³ The BirdLife Global Partnership, a network of conservation organizations, has over 10,000,000 supporters and 2,500,000 members worldwide in over 100 countries.

a. Declining Economic Growth

Two thirds of Nyungwe’s visitors were foreigners in 2011, mostly from the US, UK, Belgium, Canada and Germany. For many of the world’s economies, especially from these generating markets, national trends paralleled the following chart from The Economist Online, October 9, 2012 with growth in 2010 peaking from a massive drop in 2009:

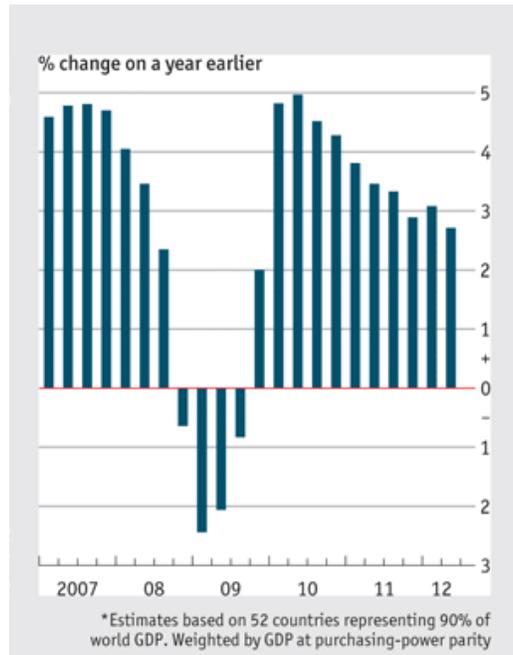


Figure 5: World GDP

Source: The Economist Online, October 9, 2012

The following chart extracted from the IMF's October 2012 World Economic Outlook report shows similar trends for Nyungwe’s main generating countries – growth spurts in 2010 and then slower growth to the present:

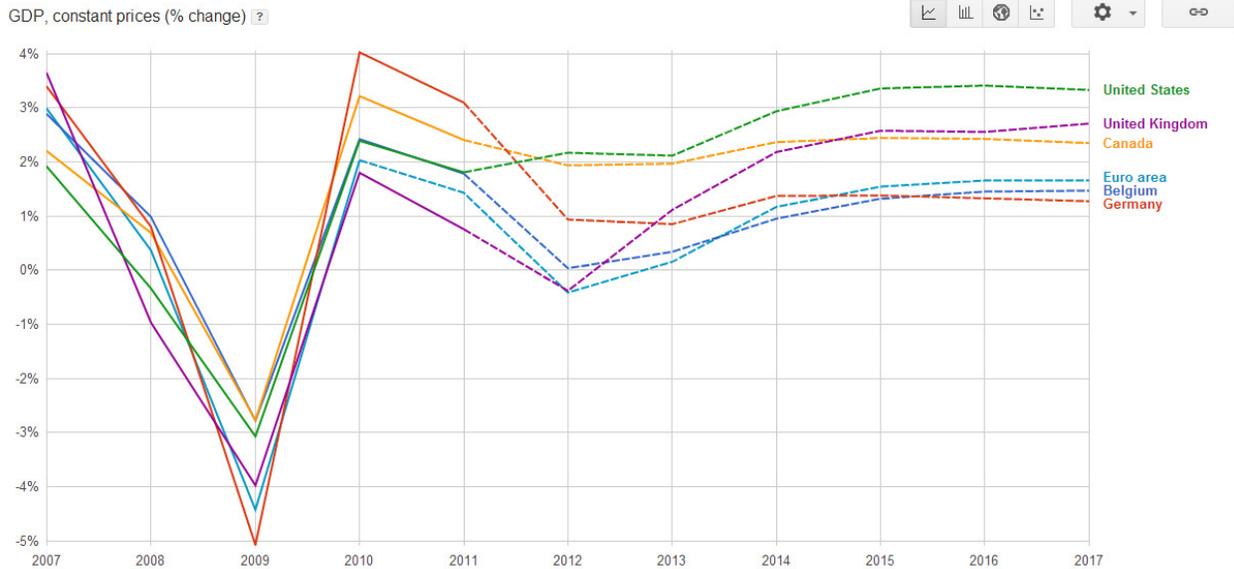
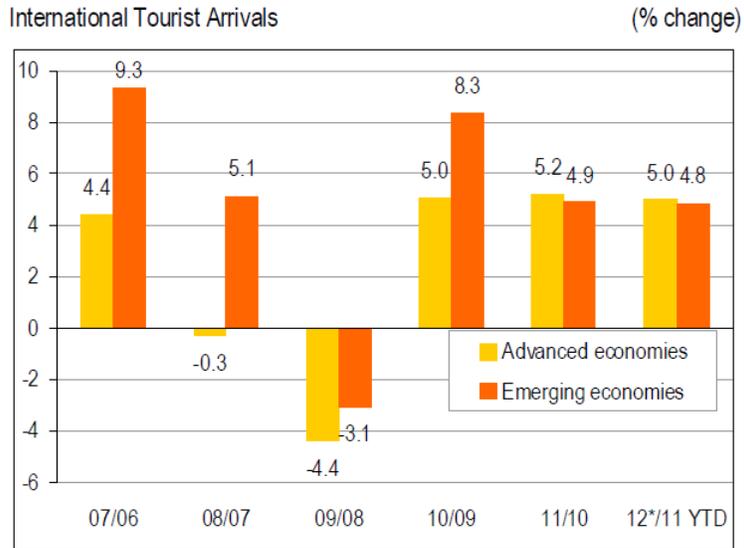


Figure 6: GDP Price Trends 2007-2017

Source: IMF World Economic Outlook Report, October 2012

World tourism trends and outbound travel by the main Nyungwe generating markets, in turn, paralleled, in part, the economic declines. As with the world economy, international tourist arrivals declined in 2008-09 in both advanced and emerging economies, and as Figure 8 shows, tourism bounced back in 2010 and, unlike the world economy, the industry has grown at a faster rate. In fact, international tourism expenditures by the main Nyungwe generating countries increased in 2011 compared with 2010 and are forecast to do the same in 2012, except for Belgium. As of September 2012, the Year-to-Date percentage growth rates were: Germany 6.2%, USA 9%, UK 1.5%, Canada 5.8%, and Belgium -21.6%.⁴ For 2012, the UNWTO is forecasting a 3-4% increase in international arrivals to one billion with growth registered for every region.

⁴ UNWTO Tourism Barometer, September 2012.



Source: World Tourism Organization (UNWTO) ©

Figure 7: International Tourist Arrivals, 2006-2012

Source: UNWTO September 2012 Tourism Barometer

As Figure 9 shows, tourism to Nyungwe also ran counter to the world economic trend with increases since 2007, except for a small decrease in 2009. As mentioned above, monthly decreases in activities sold were reported from April to September. However, if the past trend of growth in activity sales can be considered an indication, then world economic problems have not been serious constraints on growth in Nyungwe. **A likelier external constraint on growth is competition from neighboring destinations and possibly ecotourism destinations farther afield**, which offer similar tourism products.

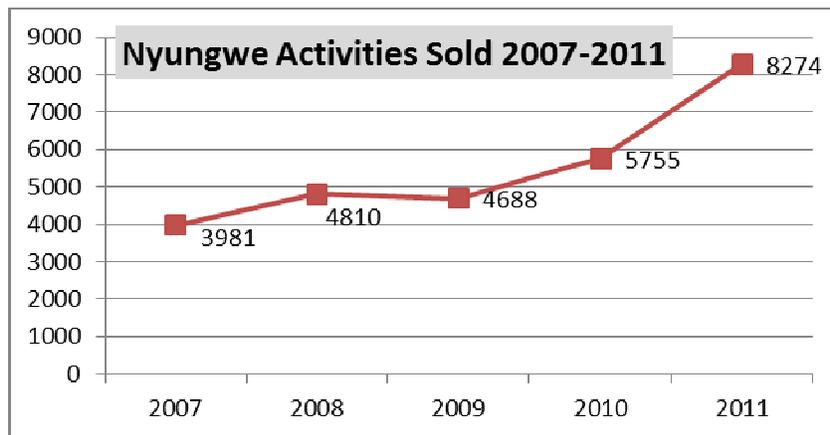


Figure 8: Nyungwe Activities Sold 2007-2011

Source: Tourism Department, Rwanda Development Board, 2011

b. Competition from destinations offering similar tourism products

As far as we know, no other destination in Eastern or Southern Africa directly markets itself as an “Escape,” although many of the product offers in the countries of these regions could easily be considered “Escapes.” They all offer one or more of the following experiences, which are similar to Nyungwe’s: primate tracking, bird watching, forest hikes, a canopy walk, camping and luxury eco-lodges. Aside from beach tourists to the Kenya coast north of Mombasa, most tourists are coming for an eco-tourism or wildlife experience – an escape from the usual to what for many tourists will be a once-in-a-lifetime experience.

Uganda is one of the more direct competitors for Rwanda and especially Nyungwe since primate tracking and bird watching are both actively marketed to some of the same markets as Rwanda, particularly the UK and US. Uganda offers primate tracking at lower prices than Rwanda – US\$350-500 for a foreign non-resident gorilla permit in Bwindi National Park and US\$75 for chimp tracking in Kyambura Gorge and US\$55 in Toro-Semliki versus US\$750 for a gorilla permit in Volcanoes and US\$90 for a chimp trek in Cyamudongo, Nyungwe. Chimp tracking in Kibaale National Park is US\$150. However, for less than the price of a gorilla permit in Rwanda, one could do both chimp and gorilla tracking in Uganda. August 2012 traveler reviews on Fodors.com were recommending Uganda over Rwanda for both chimps and gorillas due to the costs.

Beyond Africa, other eco-tourism destinations could be competition for Nyungwe’s key generating markets. Well established eco-tourism destinations such as Costa Rica, Sri Lanka, and Kerala, as well as emerging destinations such as Belize, Colombia, and Vietnam offer potential competition for Nyungwe. All of them offer similar nature-based escapes and, for the Latin American destinations, easier access to the North American market. As Figure 10 shows, most of these markets have been growing, although Vietnam was affected by the global recession in 2008-09.

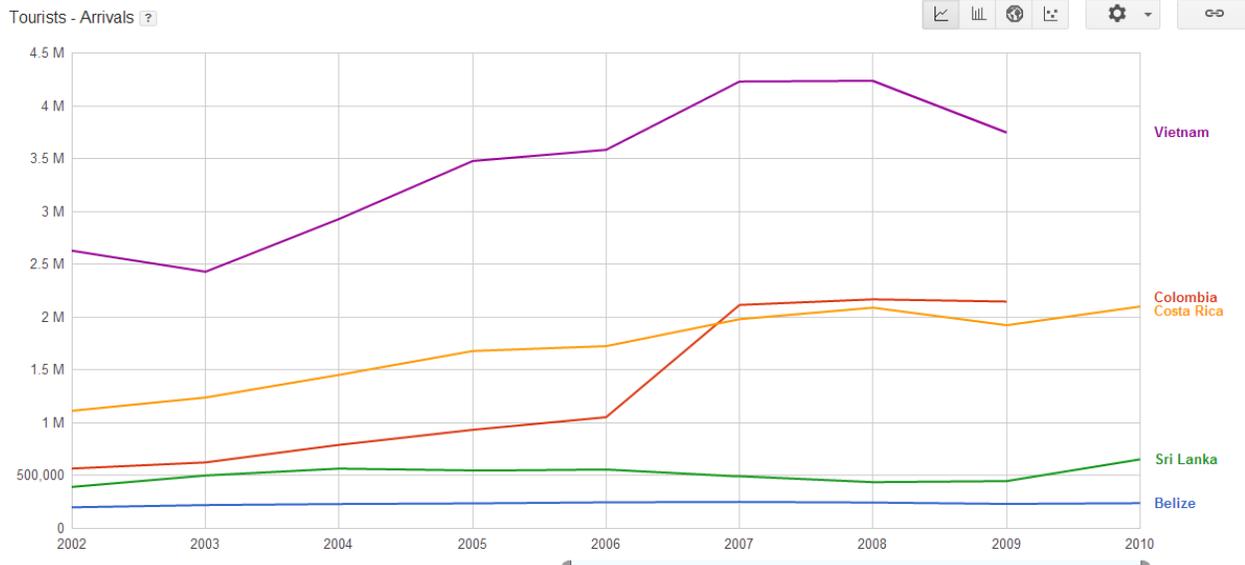


Figure 9: International Tourist Arrivals for Belize, Colombia, Costa Rica, Sri Lanka and Vietnam

Source: UNWTO Statistics

For Costa Rica, North America is 45% of their market and the UK, Belgium and Germany comprise less than 5%. North America is also important for Colombia – over 25% of their market. And Belize is highly dependent on North America at 75%. For Vietnam and Sri Lanka, the North America is less important, amounting to 10% and 6% respectively while Germany and UK are somewhat more important. All of these destinations are well represented at the World Travel Market in London and ITB in Berlin, and marketing actively for European markets, especially Nyungwe’s target markets.

Competing destinations are a potential constraint on Nyungwe’s growth, especially on a regional basis because Rwanda and Nyungwe are often included on multi-country itineraries by international tour operators. So a traveler could drop Rwanda and Nyungwe if he or she feels that they are getting better value and experiences for their money from other countries such as Uganda. Travelers’ comments on forums such as Fodors.com offer some anecdotal insights into their decision-making as to whether to include Rwanda.

c. Turning External Constraints into Opportunities

Slowing economies do not appear to have had an impact on Nyungwe and tourism globally – for now. However, with increased access to travelers’ reviews on the travel and social media sites described below, destination competition is fiercer than ever, much of it based on offering rich experiences at competitive prices. Travelers are expecting and responding to deals, especially if value for money is perceived and realized.

In October 2012, Uganda began offering discounted gorilla permits for certain months, thus with the intention of selling excess “inventory” of rooms and permits. The consultant believes that this strategy will work, especially since the primate experience is a unique, once-in-a-lifetime experience for many tourists.

For Nyungwe, this suggests a **possible opportunity** of offering discounted “Escape to Nyungwe” packages for the eight months of the year when demand is 50 per cent or less than the summer months.

2. Internal Constraints and Opportunities

a. Marketing and Product

All four tour operators interviewed for this report like Nyungwe Forest and said that their clients like the Forest as well. As mentioned above, they received a variety of complaints from their clients related to individual activities, which are reflected below. And, with accommodations, the challenge is filling rooms most of the year beyond the summer months and longer term increasing the quality and number of rooms in the middle and lower ranges.

1) Accommodations

- a. **The Gisakura Guesthouse** accommodations are too basic for most tourists and tour groups. It is adequate for independent backpackers and budget travelers, but the guesthouse can accommodate only 13 guests per night, which is a **longer-term constraint** if this segment is to be increased.

However, based on a discussion with the assistant manager, the Guesthouse is not operating at capacity most of the year; assuming an average stay of two nights per guest and low occupancy from September to June, an additional 1060 guests could be accommodated. So there is still **an opportunity to increase the backpacker and budget traveler market**. This segment is especially responsive to the social media and online marketing actions described below.

- b. **The Nyungwe Top View Hill Hotel** – The tour operators consider this hotel adequate for a **mid-range and lower budget client**, most of whom will buy at least one or two Park activities. The hotel’s rates for a double range from US\$142 to \$200 per night, including breakfast, although discounts and commissions are typically offered to tour operators. The hilltop views of Lake Kivu and Nyungwe Forest are spectacular and compensate for the traveler and operator feedback that the food, service and rooms are not yet of an international standard. And, as with the Guesthouse, **capacity is limited to 24 guests** per night, which could be a **constraint again on the**

longer-term growth of this segment. However, according to owner Nsengiyunva Barakabuye, the hotel is at only 20-27% occupancy from September to June. Based on rough estimates, 1818 additional guests per year could be accommodated during this period. With an approximate tour group size of 10 clients, the Top View has an **opportunity to accommodate at least 3-4 groups per week** for “Escape to Nyungwe” packages.

- c. **Nyungwe Forest Lodge** – The Lodge is a favorite of the tour operators and, judging from recent TripAdvisor reviews, definitely a favorite of visitors with 34 out of 42 ranking this an excellent, five star place to stay. The Lodge averages about US\$230 a night, which, for five star luxury hotel, is moderate compared with comparable accommodations in neighboring countries. As with the other accommodations, **the main constraint is capacity**, which is limited to 48 guests per day in 24 rooms. However, again most of their capacity is unused outside of the summer high season, thus leaving the opportunity to accommodate an estimated 3636 additional higher income guests.

The other constraint is more in regards to the Park. According to Jerry Were, General Manager of the Nyungwe Forest Lodge, most of the Lodge’s guests are not doing any of the Park activities. Most of them just want to stay and relax at the Lodge, thus reconfirming that **for upper end visitors, the Lodge has become a destination in and of itself**. The Lodge has become their “Escape to Nyungwe.” For lodge guests who do select an activity, it is usually the chimpanzee tracking, but data was unavailable as to how many guests buy activities.

Since the waterfall trail begins at the Lodge, there should be an **opportunity to attract guests onto the trail**, if not for the full half day hike, perhaps at least for a shorter nature walk, as recommended by the tour operators.

- d. **Camping** – **The poor camping facilities and high price mentioned previously are a definite constraint to marketing to prospective campers**. However, Gregory Bakunzi of Amahoro Tours believes that **a substantial opportunity exists to open up camping in the Park**. He said that **camping is an important way to make the Park a stand-alone destination**. Bakunzi’s belief reflects a broader trend that exists, at least in the US, of a fast growing outdoor recreation industry, of which camping is considered to be the number one activity.

In a 2012 economic impact study, the US-based Outdoor Industry Association reported that the outdoor recreation economy grew approximately 5 per cent annually from 2005 to 2011. Their research showed that over US\$645 billion was

spent on equipment, vehicles and trips by outdoor recreation participants; US\$143.4 billion, thus 22 percent, was spent on camping. A substantial opportunity for marketing “Escapes to Nyungwe” is being missed.

2) Activities

For the tour operators and their clients, the trail hikes and primate tracking experience were the most important activities followed by the Canopy Walk. **The main constraint** in regards to the trails and trek is that, aside from the Igishigishigi and Karamba Trails, all of **the trails and the chimp trek are really moderate to difficult hikes not suitable for non-hikers and casual walkers**. One of the challenges, especially for visitors who are unused to higher elevations, is that some trails such as the waterfall trail start at an elevation of 1900 meters (6233 feet) above sea level. A shorter, easier nature walk, perhaps just the first part of the Isumo waterfall trail, as suggested above, is an opportunity to expand the market, particularly to the higher income Forest Lodge guests.

Another related opportunity is to offer special interest walks, such as for photography or orchids, thus a mini photo safari **Escape to Nyungwe**.

None of the tour operators mentioned interest in the Source of the Nile hike. The road is rough and requires about half a day to drive there and back from Uwinka or Gisakura. And the hike itself is just not that interesting – very little flora and fauna. Seeing the source is a novelty, but somewhat anticlimactic; it is not much more than a dribble.

The Canopy Walk significantly boosted tourism to Nyungwe in 2010 and 2011, but as mentioned earlier, the tour operators said that it was not a top priority attraction for them. They said clients complained about the price and not being able to see much wildlife. The Canopy Walk is a unique attraction – one of only three in sub-Saharan Africa – and should be very much a part of an **Escape to Nyungwe**, but as part of an “Escape” package, which includes well-guided wildlife viewing opportunities.

Birding is the last product to be considered. Its lack of popularity is a constraint, certainly for claiming Nyungwe as a stand-alone destination for birding. This is a bit mystifying since Nyungwe is, as mentioned earlier, a “jewel in the crown...one of Africa’s best forests for birding.” The main constraint seems to be a lack of awareness of the birding opportunities in the Park. Nyungwe appears in only a handful of reports dating from 2010 and earlier on BirdForum.net and the BirdwatchingDaily.com refers to Nyungwe once – in an article about bird watching in Uganda (see <http://bit.ly/Rw6qCd>). And one of the world’s foremost birding organizations – the Cornell Lab of Ornithology – has nothing about Nyungwe on its All About Birds website: <http://www.allaboutbirds.org/NetCommunity/Page.aspx?pid=1077&q=Nyungwe>

Nyungwe’s world class birding should be a prime opportunity for marketing better marketing of birding “Escapes to Nyungwe.”

b. Human Resources

A lack of human resources, especially in marketing, is a serious constraint for positioning Nyungwe as a stand-alone destination. Tourism marketing is the responsibility of the Rwanda Development Board’s Tourism Department, which has a staff of three for marketing and one for market research. This staff is responsible for developing and distributing marketing and promotional materials, maintaining the website, responding to media requests, organizing press trips and organizing the Department’s participation in multiple travel fairs around the world. Nyungwe is one of several attractions for which they are responsible. The sole researcher is responsible for compiling and analyzing tourism for the entire country, including Nyungwe.

By focusing the marketing team’s Nyungwe-related efforts on the concept of “Escape to Nyungwe,” an **opportunity exists for more efficient and cohesive marketing of Nyungwe**. The idea of an “escape” appeals to nearly all types of travelers, especially travelers to Rwanda. And, the consultant believes, it should appeal to tour operators and facilitate their marketing of “Escape to Nyungwe” packages.

III. Conclusions

Based on the current tourism situation and existing markets for Nyungwe, as well as the constraints and opportunities for marketing Nyungwe, it is the consultant's opinion that, apart from the Nyungwe Forest Lodge, **Nyungwe National Park cannot currently be marketed as a stand-alone destination.**

Apart from relatively small numbers of visitors who come to Nyungwe for the birds or a challenging trek, most visitors come to Nyungwe because it is an escape – an escape to a luxurious eco-resort or an escape to nature. Chimps, the Canopy Walk and the Nyungwe Forest Lodge are draws, but they are not sufficiently compelling for Nyungwe to compete as a stand-alone destination. Chimps can be viewed in Uganda and Tanzania and luxury lodges exist throughout East Africa. **Nyungwe can, however, become a stand-alone destination** for its main market segments if it is presented and positioned as an escape – **Escape to Nyungwe.**

Two thirds of the current market for Nyungwe are foreign visitors, most of who are from some of the top tourism spenders: #1 Germany, #2 US, #4 UK, #6 Canada, and #11 Belgium. Tour operators are beginning to target additional markets such as Australia, China, Japan and South Korea, which also rank among the top 20 tourism spenders. Additional important markets for Nyungwe highlighted above include Rwandans, Foreign Residents of Rwanda, and Economic Commission for Africa (ECA) foreign and national residents. An **Escape to Nyungwe** could be appealing to all of these groups.

At least 50% of Nyungwe's activities are sold to these markets between June and September and the accommodations experience their highest occupancy during this period. Visitors are mostly buying trail hikes, chimp treks and the canopy walk. The concentration of activity sales in this period points to a seasonality issue of excess available inventory of rooms and activities most of the year. Discounted **Escape to Nyungwe** packages could be used as a way to sell this excess inventory and overcome the seasonality issue, as well as counteract economic downturns in key generating markets.

However, some product developments are recommended to enhance the marketability and competitiveness of Escape to Nyungwe packages:

- Include the Canopy Walk as part of an Escape to Nyungwe package with well-guided wilderness viewing;

- Create an easy, well-guided nature walk, perhaps the first part of the waterfall trail, which attracts Forest Lodge guests;
- Invest some of the camping revenue into improving the Uwinka campsite facilities and marketing of camping opportunities;
- Increase awareness of birding opportunities with key birding organizations, websites and media;
- Encourage tour operators and the Nyungwe Forest Lodge to create a mini-Escape to Nyungwe photo safari, perhaps based on the first part of the waterfall trail.

All of these product enhancements could fit under an **Escape to Nyungwe** concept, some of which could be developed by the 14 tour operators who currently offer Nyungwe tours. However, marketing the concept regionally and internationally will depend on the Rwanda Development Board Tourism Department's marketing team, which is under-staffed and overworked. The following action plan, which focuses on Nyungwe marketing and thus the **Escape to Nyungwe** concept, could serve as a framework for the entire Department's marketing. The plan emphasizes social media and word-of-mouth for marketing because it has proven to be cost-effective for destination marketing, manageable for limited marketing staffs, relatively easy to measure, and in keeping with travelers' decision-making.

IV. Recommendations and Action Plan

In determining how to reach the marketing targets described below, the following diagram from the Nyungwe Nziza Tourism Value Chain Report is useful to keep in mind, which as mentioned above, emphasizes “internet” (social media) and word-of-mouth for reaching Nyungwe’s key generating markets:

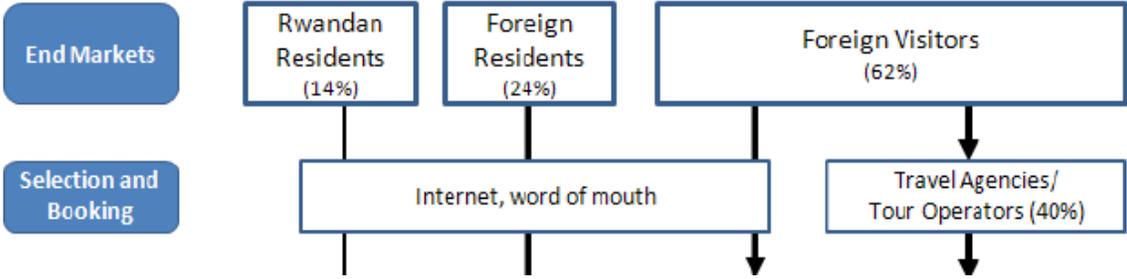


Figure 10: Tourism value chain map for Nyungwe National Park

The strategies, therefore, should focus on ways to reach these “end markets.” The following sections describe ways to target these markets, especially through the industry (tour operators), online and offline media, Nyungwe social media “channels,” and some suggested partnerships.

A. Industry Outreach

1. Local and Regional Tour Operators

To reach some of the above marketing targets, a top priority is to get Nyungwe as a destination, especially the concept of an **Escape to Nyungwe**, into the offer catalogues of tour operators and on the lists of recommended destinations of travel agencies in Europe, North America, Australia, India and China. Nyungwe, however, would probably only be an offer for those operators that are already selling Rwanda, most likely as part of a multi-country itinerary, unless that operator specializes in bird watching, which is a stand-alone niche market. Bird watchers opt for tours only with other bird watchers. And for most of these operators, their ground operations and arrangements would be handled by Rwandan and Ugandan tour operators. So, for Nyungwe to be “sold” to the overseas operators, first their Rwandan and Ugandan counterparts need to be sold on Nyungwe and an **Escape to Nyungwe**.

An Escape to Nyungwe concept could enable the 14 local tour operators that sell Nyungwe to more easily attract new clients – both foreign tour operators and individuals. As an escape, Nyungwe can offer something for everybody.

And as mentioned above in the Constraints and Opportunities section, accommodation capacity should not be an issue for the operators. Between the Nyungwe Forest Lodge and the Top View Hotel, **at least 5454 additional guests can be accommodated each year**. Assuming an average group size of 7-8 clients, each of these 14 tour operators would have to bring in almost 50 more groups to Nyungwe annually to reach full occupancy in the Lodge and Nyungwe Top View Hill Hotel. And assuming that at least 25 per cent of the Lodge's guests and 75 per cent of the Top View's guests bought Park activities, then the total sold could increase by at least 27 per cent to 10,507 activities. So, unless the operators suddenly experience huge increases in demand, there should be plenty of capacity outside of the peak summer months to accommodate increased numbers of groups.

The Rwandan operators that serve as the ground operators for overseas operators -- which are probably most of them -- provide their services in response to the needs and demands of these operators. If the overseas operators receive more requests for tours that include Nyungwe, then presumably the Rwandan operators would respond accordingly. So, while it is important to "sell" Nyungwe to the local operators, it is also important to reach out to operators and travel agencies in priority countries and for priority segments.

How should these operators and the Rwandan operators be better sold on Nyungwe?

- Rwandan operators – Direct contact and personal relationships. The basic essence of what drives sales!
- For foreign operators:
 - Selected trade fair participation (see below) with meetings set up in advance with the operators indicated in the action plan;
 - Media outreach to travel trade and consumer online and offline publications, also indicated in the below action plan, in order to stimulate further traveler demand in Nyungwe. An **Escape to Nyungwe** lends itself easily to interesting travel media stories for a variety of markets;
 - E-marketing, which includes links to and highlights testimonials and trip reports on the operators' sites. Show support for the operators that are marketing Nyungwe and they will be receptive to RDB's efforts.

2. Trade Fairs

An **Escape to Nyungwe** could be an internationally appealing concept, especially at international travel trade fairs. Travel fairs can be a cost-effective way to reach foreign tour operators, travel agencies, travel trade publications, and consumer travel media – and they can also be costly and ineffective if Fairs are not carefully selected and participation is not planned and promoted well in advance. An **Escape to Nyungwe** could lead to marketable stories for tour operators, ones that could provide some unique selling propositions for Rwandan operators as they market themselves and their itineraries at the Fairs. A concept such as **Escape to Nyungwe** could fuel the imaginations of prospective buyers and entice them into increasing their generating market promotion and marketing efforts.

According to the International Tourism Trade Fair Association (ITTFA), “more than 80% of visitors to travel and tourism trade fairs are decision-makers who rate exhibitions as the most cost-effective information source for new products, destinations and services.” (ITTFA Guide)

ITTFA and UNWTO both provide concise guides to making the most of travel trade fair participation. The ITTFA guide can be downloaded from: <http://ittfa.org/wp-content/uploads/2011/09/ITTFA-Exhibitor-Guide.pdf>

Below are some key steps recommended by ITTFA and some Nyungwe specific actions:

Table 5: Trade Fair Steps

OVERALL ITTFA RECOMMENDED STEPS	MORE SPECIFIC STEPS RELATING TO NYUNGWE	NYUNGWE-RELATED ACTIONS
Set objectives for participating in Fairs and in a particular Fair.	<p>The Objectives for Nyungwe-related participation are:</p> <ol style="list-style-type: none"> 1) Put Nyungwe more firmly on the map of targeted industry and media stakeholders. Know who you are targeting. 2) Meet with the local operators and agencies that are already marketing Rwanda. 3) Organize events to introduce stakeholders to Nyungwe – a media briefing, reception on the stand and/or cultural 	<ol style="list-style-type: none"> 1) Appoint a trade coordinator who sets up a schedule based on trade fair deadlines. 2) Set meetings well in advance. 3) Make arrangements for events before going to the Fair, including emailing of invitations and announcements. 4) Reach out to journalists before going to the Fair. So, for the World Travel Market,

OVERALL ITTFA RECOMMENDED STEPS	MORE SPECIFIC STEPS RELATING TO NYUNGWE	NYUNGWE-RELATED ACTIONS
	<p>presentations.</p> <p>4) Reach out to both past media who wrote about Rwanda and additional potentially interested media. Ask journalists who previously wrote about Rwanda for referrals to additional journalists.</p>	<p>the UK journalists who participated on the Nyungwe media tour should be asked for referrals to additional journalists.</p>
Choose the Right Fairs	<p>1) The “Right Fairs” for Nyungwe should be based on the current list of priority generating markets.</p> <p>2) Registration packets for each of these Fairs should be obtained and completed as early as possible.</p>	<p>1) Based on the who has been visiting the Park, the following Fairs should be considered priorities:</p> <ul style="list-style-type: none"> A. US – Adventure Travel Show and the National Tour Association (NTA) Annual Show B. UK – World Travel Market (WTM) (Nov 5-8, 2012) and the Bird Fair (August) C. Belgium/Netherlands -- D. Vakantiebeurs, 9-13 January 2013, Utrecht E. Germany – ITB, March F. India (and other Asian markets) – ITB Asia, October, Singapore G. Turkey – East Mediterranean International Tourism and Travel Fair (EMITT), February, Istanbul. With the new Turkish Airlines route, this could be a good fair to test the market.
Planning for the Fair	<p>1) Appoint one person to be the exhibition coordinator</p>	<p>1) RDB should appoint one person who maintains this</p>

OVERALL ITTFA RECOMMENDED STEPS	MORE SPECIFIC STEPS RELATING TO NYUNGWE	NYUNGWE-RELATED ACTIONS
	2) Budget should be allocated according to the importance of each market, thus with the highest priority on US, UK and Germany-based Fairs. 3) Having a portable and transportable exhibition stand is an advantage.	responsibility. Sub-tasks such as arranging Rwandan tour operator involvement could be delegated to an industry affairs officer; media outreach to a media affairs officer. The Tourism Warden for Nyungwe should be directly involved in the trade fair planning and implementation, ideally attending at least WTM and ITB.
Promotion	1) Promote the presence of Rwanda and Nyungwe in advance of the Fair to key stakeholder and interest groups: A. Industry B. Media C. Selected organizations and associations 2) Press releases based on news from the Park	1) In addition to direct contact via email and phone with the stakeholders, use Facebook and Twitter in reaching out to them and encouraging them , in turn, to promote the Rwanda/Nyungwe involvement through their own social media channels. 2) 2) Get Nyungwe press releases to the Fair’s media center in advance of the Fair.
Staffing	1) Assign at least two persons to be responsible for the stand reception desk, maintaining the meeting schedule and keeping track of who has visited the stand. 2) Some advance training on working a stand would be helpful, especially how to “sell.” ITTFA recommends: <ul style="list-style-type: none"> ○ Concentrating on key market segments (thus potential tour operators and media, not on 	1) Two RDB staff should be responsible for the stand, with one acting as the reception desk contact and the other being available to meet with media and industry representatives.

OVERALL ITTFA RECOMMENDED STEPS	MORE SPECIFIC STEPS RELATING TO NYUNGWE	NYUNGWE-RELATED ACTIONS
	<p>individual, unaffiliated visitors)</p> <ul style="list-style-type: none"> ○ Keep track of who visits the stand, especially noting the customers that they are serving. 	
Follow-up	1) Essential to follow-up on the meetings and contacts gathered at the Fair.	1) Introduce contacts to tour operators on the stand.

Necessary promotional materials for Nyungwe representation at the Fairs:

- 1) Overall **Escape to Nyungwe** brochure with map;
- 2) Nyungwe special interest brochures, i.e. cultural tourism, birding, canopy walk, all under an Escape to Nyungwe theme;
- 3) Press releases;
- 4) Target media list, especially of registered media. Obtain from the Fair’s press office.

B. Media Planning and Development

The travel media world has expanded exponentially this past decade. The age-old ways to reach the market – tour operators, travel agencies and travelers – was through print travel magazines and guidebooks, the travel sections of newspapers and corresponding websites, as well as the websites of booking engines such as Expedia and Travelocity. And now with smartphones that are internet-enabled in nearly every country, including Rwanda, and capable of high-resolution photos and videos, travel information and images have flooded a growing number of online, social media channels. Now, everybody is a reporter or potential reporter of places and experiences. The traditional channels are still important, but with Facebook, YouTube, Flickr, Twitter and others, user-generated reviews and information is becoming far more accessible and widespread.

As the Nyungwe Nziza Pricing Report visitor survey showed, 86% of visitors used internet for information to choose a holiday destination and 63% consulted with friends and family.

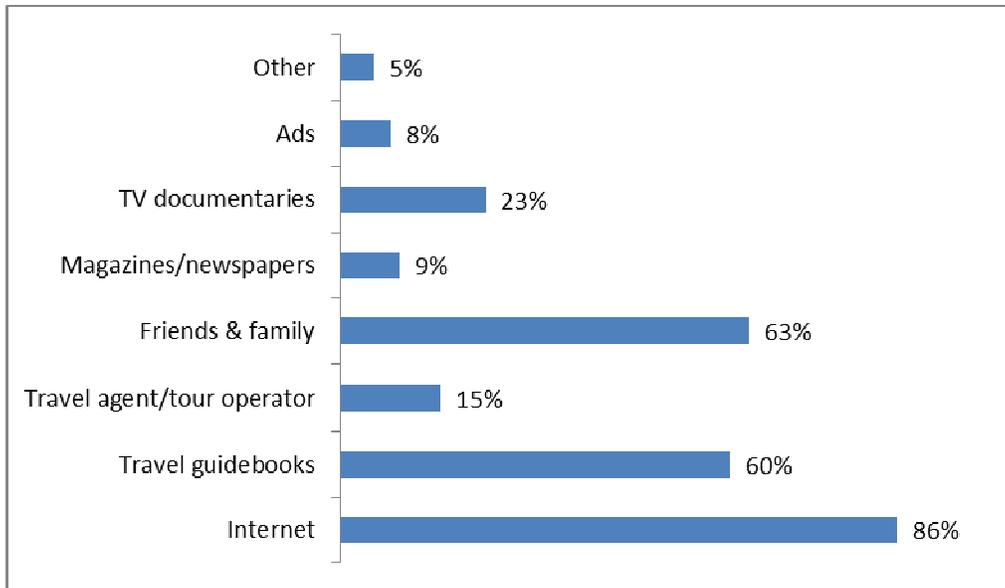


Figure 11: Main sources of information to choose a holiday destination

Source: Nyungwe Nziza Pricing Report, May 2012, p. 80

Guidebooks still rank high, although recommendations from family and friends, not surprisingly now rank higher. This survey does not ask the question, but as other surveys (referenced below) show, **many of these recommendations come from word-of-mouth**, especially via Facebook and TripAdvisor, as well as from links to videos on YouTube and photos on Flickr or one of the other photo sharing sites.

In the media descriptions listed below and in Appendix A and the action plan, **selected print and online media are targeted**; the online versions of print media are more important than ever for reaching tour operators, other travel media and travelers. Media needs to be targeted by country and matched, as best as possible, according to a particular segment.

The second means of getting the Escape to Nyungwe story out to media is through media familiarization trips. So far, the project has assisted Jeremy Head on his visit, which resulted in an article for the UK travel magazine Wanderlust. The project also facilitated a familiarization tour for five European travel journalists, all of whom except one had filed stories for travel trade and/or consumer media. Their participation has also resulted in the Nyungwe Nziza project being nominated by the British Guild of Travel Writers as one of the top three tourism development projects and then in November 2012 winning the Guild's top awards as the best overseas and best global tourism projects.

The Turkish Airlines office in Los Angeles has also offered to provide six air tickets to West Coast journalists to travel to Rwanda. At the time of writing, six highly experienced journalists were recruited and were ready to begin developing articles and video proposals for the trip. The project was waiting for RDB's final approval.

C. Online Marketing

As mentioned above, most visitors to Nyungwe research and book their visits online. Only 40% of foreign visitors book via travel agencies and tour operators. And most of the latter also probably research their trips by first visiting the websites of the agencies and operators. Finding this information online is often through search engines and trusted travel information brands such as TripAdvisor, Lonely Planet and Orbitz. According to EyeForTravel, an online travel consultancy, "60% of travel industry marketing gurus still rank search as the number 1 way to drive traffic...the most influential marketing channel for online travel marketing..."

1. RDB Role

RDB does not yet have a staff person dedicated to online marketing. Each of the three marketing staff, at the time of writing in October 2012, had multiple marketing functions, which included online marketing. At least one person needs to be dedicated to online marketing, particularly the following:

- 1) Revamping rwandatourism.com website so it can be more easily updated and linked to social media channels;
- 2) Maintaining the Rwanda Tourism Twitter feed, Facebook page, YouTube channel, Flickr page;
- 3) Placing Rwanda tourism content with the websites and blogs mentioned above, as well as adding excerpts, photos, videos and links to the Facebook pages of these sites;
- 4) Establishing and maintaining a community of Rwanda tourism fans – past visitors – who recount experiences on their Facebook pages, Twitter feeds and YouTube sites, thus reaching thousands of potential visitors.

All of these actions are equally relevant to online marketing for an **Escape to Nyungwe**. Since RDB is short-staffed, the Nyungwe Nziza Project can continue to support online marketing efforts for Nyungwe Park. When RDB has the necessary staff onboard, the Nyungwe Nziza online marketing and overall marketing efforts should be fully integrated into the RDB's work.

2. Word-of-mouth and Facebook - Most Powerful Marketing “Tools”

As indicated in the Nyungwe Nziza Value Chain report and multiple surveys on social media and tourism marketing, word-of-mouth is the most powerful means of marketing and much of this is occurring via Facebook. In a July 2012 report by *tnooz* (<http://www.tnooz.com>), a popular travel technology website, on the impact of social media on travel (<http://bit.ly/NuD1sP>), researchers found that 92% of consumers say they “trust earned media, such as word-of-mouth and recommendations from friends and family, above all other forms of advertising.” And 52% of Facebook users said their friends’ photos inspired their holiday choice and travel plans and 55% “liked’ Facebook pages specific to a vacation. So, **word-of-mouth achieved through Facebook should be a main marketing tool for both overall Rwandan tourism and Nyungwe marketing**. However, while it is important, effective use of Facebook for marketing also requires integration with other online and social media channels. For more about Facebook and how it is being used to market Nyungwe and could be used for an **Escape to Nyungwe**, see the section below.

3. NyungwePark.com and RwandaTourism.com

For online marketing and, frankly marketing overall, websites are still the most important tools. Websites, however, must be optimized for search engines, especially Google, Bing and Yahoo, so potential visitors can find them when they are searching online for travel information. Optimizing for search engines is determined, in part, by the number of other websites that link to your site. As of October 2012, 13 sites linked to NyungwePark.com and 441 sites to RwandaTourism.com.

Increasing the number of sites linking to NyungwePark.com is a priority. The Nyungwe Nziza project has been pursuing this by requesting other sites, particularly the travel media sites listed above, to link to NyungwePark.com. The project has also been placing comments on these sites, as well as the sites of tour operators, which include links to NyungwePark.com and the other sites mentioned below.



Figure 12: Nyungwe Nziza project website

4. Facebook

As mentioned above, Facebook is proving to be one of the best word-of-mouth channels for promoting destinations. The Nyungwe Fans Facebook page, which is shown below, was launched on July 10, 2012.

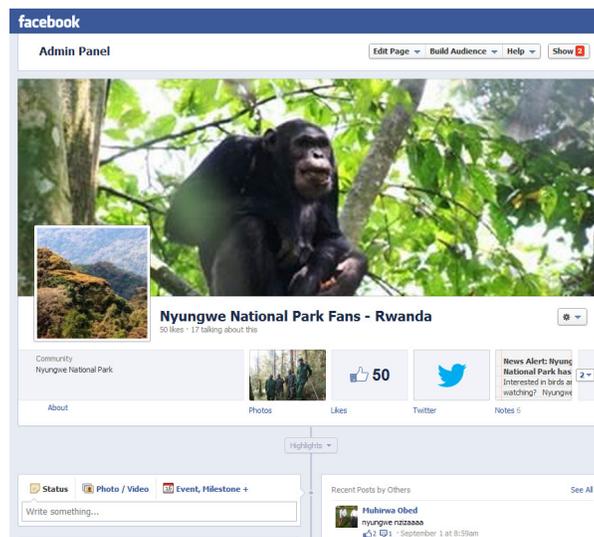


Figure 13: The Nyungwe Fans Facebook page

Less than 30 people saw the page until the week of August 23rd. By the end of the month, 238 people saw the page, a week later the number shot up to 816. And a week after that, the number reached 858. As of the end of October, the number reached 921. The key to maintaining an audience is the continual addition of content – text, photos, videos and links to other sites and Facebook pages.



Figure 14: Number of people reached on the Nyungwe Fans Facebook page

The content that seemed to jolt peoples’ interest was the issuing of news alerts, such as Nyungwe going to the birds, Nyungwe named a top destination by Lonely Planet and the addition of videos. The lesson? Content continues to be “king,” especially branded content and snappy headlines such as “Nyungwe has gone to the birds.”

More linkages will be pursued between the Facebook page and branded travel and media sites, as well as the sites listed below. The following diagram lays out the promotional plan leveraging Facebook.

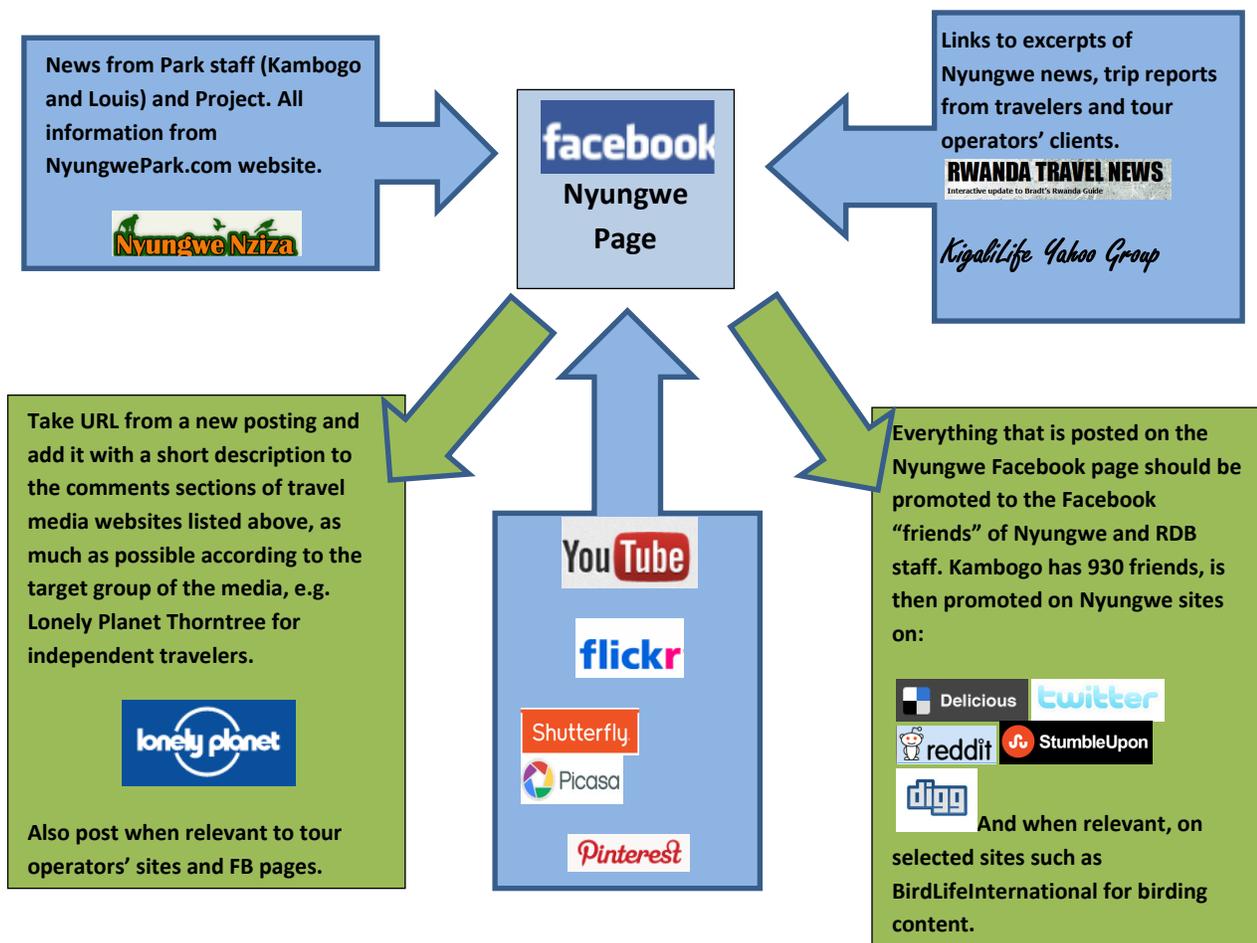


Figure 15: Promotional plan leveraging Facebook

The Nyungwe twitter feed (www.twitter.com/NyungwePark) currently has 79 followers and is following 300 people. The URL and an excerpt of anything that is posted on the Nyungwe Nziza website, the Facebook page, the YouTube Channel or Flickr are then tweeted. Sometimes the tweets are retweeted by people this twitter feed is following. For example, Gael Ruboneka retweeted a tweet about birds to his 602 followers and that tweet, in turn, could have been retweeted to hundreds of others.

5. YouTube



The Nyungwe YouTube channel currently has 47 videos from and about Nyungwe.

<https://www.youtube.com/user/NyungwePark1?feature=mhee> It includes video clips from visitors, interviews with Park rangers and a few semi-commercial videos from the Nyungwe Forest Lodge. Whenever a new video is posted, it is posted on the Facebook page and tweeted.

6. Flickr, Shutterfly, Picasa



The Nyungwe Flickr photo stream currently includes six sets of photos about Nyungwe: Birds, Ferns, Orchids, the Uwinka Visitor Center, the Canopy Walk and Chimp Trekking:

<http://www.flickr.com/photos/nyungwefan/>

Whenever new photos are posted, they are automatically posted to the Nyungwe Facebook page.

The Nyungwe photo stream is a “member” of the following Flickr groups: “I Love Birds” (14,364 members), Birds Photos (43,117 members), Bird Fanatics (12,847 members), Bird Photography (952 members), Birding in the Wild (7097 members), Birds (14,671 members), Bird Brained (3605 members), Birds birds birds (8423 members) and Ecotourism Africa (20 members). All of these groups are potential networks for promoting Nyungwe.

Shutterfly and Picasa are also popular photo sharing sites, but Nyungwe pages are not set up yet on those sites. One photo-sharing site should be enough.

7. Pinterest



Pinterest is a relatively new site that is becoming popular for destination marketing. While a Pinterest Nyungwe page has been established (<http://pinterest.com/nyungwepark/>), in all frankness, the consultant is not quite sure how to use it yet to the advantage of marketing the Park. We will continue to watch this space and see what possibilities might exist.

8. TripAdvisor



TripAdvisor has become the world's largest travel site and source of user-generated travel reviews. The TripAdvisor sites, which include multiple other brands, attract over 74 million unique monthly visitors from around the world in multiple languages. The reviews cover just about everything, including Nyungwe National Park and individual experiences within the Park.

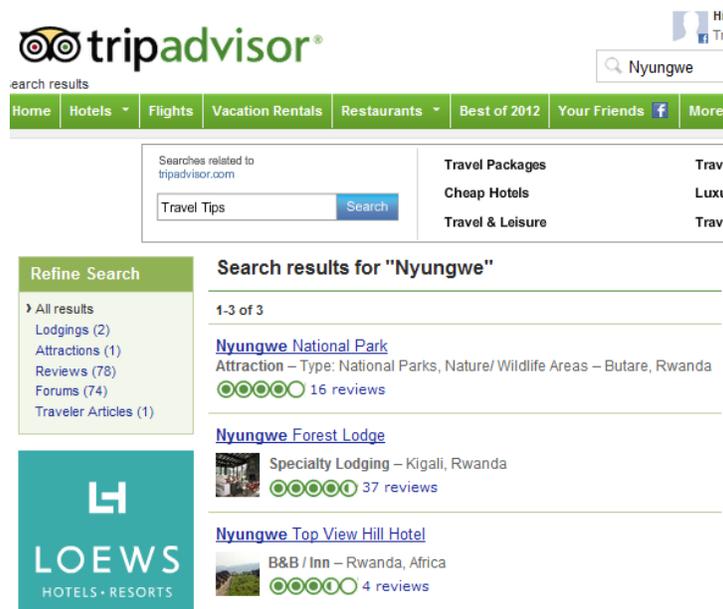


Figure 16: Nyungwe TripAdvisor site

We posted links to the various Nyungwe-related websites on TripAdvisor, but those were not accepted. TripAdvisor sticks with reviews from travelers only. So we have placed a link to the TripAdvisor Nyungwe page on the Nyungwe Facebook page, so that visitors can access this information from the Facebook page as well.

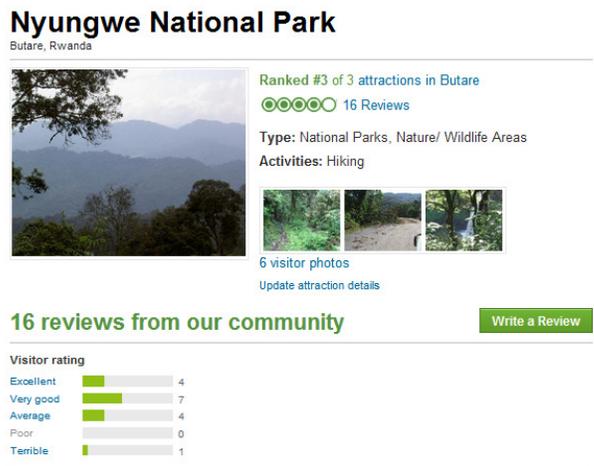


Figure 17: Link to the TripAdvisor Nyungwe page on the Nyungwe Facebook page

9. Lonely Planet



The Lonely Planet Thorntree Forum is one of the most active independent traveler forums on the web. It has become “the” source of travel information for travelers in nearly every corner of the planet. The Nyungwe section includes trip reports and multiple requests for information about travel to the Park. Since the beginning of September 2012, for example, seven posts have been submitted about Nyungwe. Unlike TripAdvisor, we have been able to post links to Nyungwe sites. We will continue to post links to information posted on the Nyungwe Nziza website and Facebook page whenever it is relevant to independent travelers.

D. Potential Partnerships

A number of partnerships can benefit the development and marketing of Nyungwe. The types of organizations with which the Park, RDB and the Nyungwe Nziza Project could pursue partnerships include:

- 1) Private sector businesses and associations;
- 2) Nongovernmental organizations;

3) Educational institutions

At a minimum, a “partnership” could be linking of websites, Facebook pages and following twitter feeds and re-tweeting tweets from the other organization. For those sites that offer “memberships” and/or subscriptions to their blog posts or newsletters, these are sometimes also ways to distribute links and content from Nyungwe sites. For example, Nyungwe Fan is a member of the Bird Forum and contributes Nyungwe-related birding information; the Forum has 116,582 members. Below are some – not all – representative examples.

1. Private sector businesses and associations

The newsletters of associations such as the Africa Travel Association, of which this consultant is a member, and the Rwanda Tours and Travel Association should regularly receive news of Nyungwe parks with requests to circulate the news to their members.

Tourism industry stakeholders should also be regularly informed of Nyungwe Park developments. These could include:

Table 6: Tourism industry stakeholders to be regularly informed of Nyungwe Park developments

TOURISM INDUSTRY STAKEHOLDERS	COMMENTS
AIRLINES	
Ethiopian Airlines	Link to Facebook page. Place news and feature article in in-flight magazine.
KLM	Link to Facebook page. Attempted to place news and feature article in in-flight magazine.
Rwanda Airways	Link to Facebook page. Place news and feature article in in-flight magazine.
Turkish Airlines	Link to Facebook page. Place news and feature article in in-flight magazine.
Brussels Airlines	Link to Facebook page. Place news and feature article in in-flight magazine.
Kenya Airways	Link to Facebook page. Place news and feature article in in-flight magazine.
Qatar Airways	Relationship already established.
South African Airways	Link to Facebook page. Place news and feature article in in-flight magazine.

TOURISM INDUSTRY STAKEHOLDERS	COMMENTS
EQUIPMENT SUPPLIERS	
Binoculars and Cameras	
Bushnell and Olympus	Two of the main providers of binoculars to birdwatchers. Link to Facebook page. Send YouTube links to Nyungwe ranger video interviews. Place story with their corporate social responsibility CSR office and public relations office.
Leica, Nikon, Olympus, Pentax, and Swarovski, and Zeiss	All are top-rated for bird watching and thus potentially interested in the publicity of promoting use of their binoculars in Nyungwe.
Outdoor Gear	
Recreational Equipment, Inc. (REI)	One of largest outdoor gear providers in the US. They also offer an extensive travel program, including Africa, but not Rwanda yet. Their target demographic – active adventurous adults, many higher income and education levels – fits for Nyungwe. REI blog could be good for placing articles.
L.L. Bean	Also one of the largest outdoor gear providers in the US. Similar to REI.
Tumi	Luxury luggage provider. Encourage them to do a photo shoot to promote their luggage from the heart of Africa. They pride themselves on the durability of their products.
Louis Vuitton bags	Pitch a Nyungwe photo shoot. They shot Angelina Jolie in Cambodia and Bono in Africa with their bags. 

2. Nongovernmental organizations

In addition to the African Travel Association (ATA) and the Rwanda Tours and Travel Association (RTTA), there are many environmental organizations whose members could be interested in Nyungwe. Some of the most prominent organizations are listed below.

Table 7: Environmental organizations that might be interested in Nyungwe

INSTITUTION	COMMENTS
Columbus Zoo	The Zoo has been supporting a Nyungwe Forest Conservation Project through its Partners in Conservation program. Perhaps the program could be reactivated?
Sierra Club	With 1.4 MN members, it is one of the largest environmental organizations in the US. Their magazine, Sierra, is circulated to all members and could be a good outlet for the placement of Nyungwe content. They also maintain a large travel program, which includes tours to Africa, but not Rwanda. Some of their trips are also voluntourism tours. Members are well educated and many at high-income levels.
National Audubon Society	One of the oldest conservation organizations especially dedicated to the protection of birds. They have a network of 467 Chapters, 50 Centers, 2544 Important Bird Areas and hundreds of thousands of members. Their magazine, Audubon, and newsletter Audubon Wingspan are possible outlets for Nyungwe bird news.
National Geographic	Already linked to National Geographic, through their Geotourism program.

3. Educational institutions

Table 8: Educational institutions

INSTITUTION	COMMENTS
Antioch University, Center for Tropical Ecology and Conservation	Already established relationship. Beth Kaplin, Director of the Center for Tropical Ecology and Conservation is a Nyungwe expert and supporter.
Cornell Lab of Ornithology, Cornell University	A world leader in the study, appreciation, and conservation of birds. They are supported by “45,000 friends and members...and 5 million bird enthusiasts who connect” with them online at allaboutbirds.org . They also maintain a blog, Facebook page and eNewsletter – all possible ways to promote Nyungwe.

E. Action Plan – Next Steps

The following Action Plan parallels the above sections and specifies target organizations, media, and travel fairs. For example, in order to target local and regional tour operators, we recommend a survey of RTTA members followed by a presentation about Nyungwe and the survey results to the members. The survey and presentation would be conducted by RDB Tourism.

1. Targeting Trade

Table 9: Trade organization next steps

TRADE ORGANIZATION	TACTICS	WHO
Local and Regional Tour Operators		
Selling Rwandan operators on Nyungwe	<ol style="list-style-type: none"> 1) Nyungwe survey of RTTA members 2) Presentation at RTTA 	<ol style="list-style-type: none"> 1) RDB with analysis support from Nyungwe Nziza Project (NN) 2) RDB with NN for support.
Selling Ugandan operators on Nyungwe	<ol style="list-style-type: none"> 1) Work through RTTA, connect with Ugandan operators, focusing on those who are branches or affiliates of Rwandan operators. 	<ol style="list-style-type: none"> 1) RTTA with presentations and brochures provided by NN. 2) Online and social media outreach
Foreign tour operators		
Reaching the operators through Trade Fairs	<ol style="list-style-type: none"> 1) One RDB Tourism staff needs to be appointed and trained as the main coordinator for travel trade fair participation. 2) Use the ITTFA and UNWTO guides as training and planning tools. See above for specific steps based on the ITTFA guide. 3) Advance planning for trade fair participation is essential both for trade and media outreach and interviews. Cultural and media events 	<ol style="list-style-type: none"> 1) Philibert Ndandali, Senior Promotion Officer, Tourism and Conservation Department, RDB with support from Ildephonse Kambogo, Tourism Warden, Nyungwe National Park. NN can conduct some of the training.

TRADE ORGANIZATION	TACTICS	WHO
	should be included.	
	1) Adventure Travel Shows: 2) Adventure Travel World Summit, Lucerne, Oct 2012 3) New York, Jan. 2013 4) UK, Jan 2013 5) RDB should join the Adventure Travel Trade Association	1) RDB facilitates trade show presence with RTTA members and Nyungwe park staff
	1) National Tour Association Convention, Jan 2013? Need to look at this more closely. Usually a good show to tap US operators.	1) RDB Trade Fair coordinator with input on Nyungwe from NN.
	1) WTM, London, Nov 2012 – RDB/RTTA presence should already be arranged. Organization of meetings and events should be completed by end of September.	1) RDB Trade Fair coordinator with input on Nyungwe from NN.
	1) Vakantiebeurs, 9-13 January 2013, Utrecht. It is not too early to start planning for participation in this Fair.	1) RDB Trade Fair coordinator with input on Nyungwe from NN.
	1) ITB, Berlin, March 2013 – Registration deadline for exhibitors was Sept 1, 2012. Additional deadlines in mid-December.	1) RDB Trade Fair coordinator with input on Nyungwe from NN.
	1) ITB Asia, EMITT Turkey – ditto. Turkish Airlines connection is an important one to mine.	1) RDB Trade Fair coordinator with input on Nyungwe from NN.

2. Targeting Media

Table 10: Media targets and tactics

MEDIA TARGETS	TACTICS	WHO
Print media and their online sites		
	The media list in Annex A is prioritized by types of media and, to a lesser extent, by target countries other than the US, UK and Germany. More needs to be done on German speaking markets, Belgium and India.	RDB with NN support and input. A media relations official needs to be designated.
Media familiarization trips		
	Organizing additional group media tours by NN is a complicated endeavor that requires sponsorship from multiple patrons. It would be easier to recruit and arrange for visits by individual journalists. Turkish Airlines is willing to sponsor journalists' flights from the Western US.	RDB and NN
Online Media		
Overall Strategy	Establish and maintain an overall online marketing program for Rwandan tourism that includes a focus on Nyungwe. General steps for RDB are specified above.	RDB needs to designate a marketing staff person whose sole function is online marketing. As described above, online marketing is a top priority for reaching nearly every market segment. NN can implement the online marketing of Nyungwe.
Facebook and Word-of-Mouth Marketing + YouTube, Flickr, and KigaliLife.	The chart above shows that all Nyungwe content that appears on other sites – the NyungwePark.com site, the Nyungwe sites with YouTube, Flickr, Rwanda Travel News, KigaliLife – should also appear on the Facebook page. And when	NN can manage the Nyungwe-specific social media content distribution. And when RDB is ready, this strategy can be replicated for all of Rwandan tourism. However, RDB must first assign at least one person to online marketing with a major

MEDIA TARGETS	TACTICS	WHO
	that content is placed on the Facebook page, the link should be circulated to Twitter, Reddit, Digg, Delicious and Stumbleupon.	focus on social media marketing.
Travel sites – TripAdvisor, Lonely Planet, Rwanda Travel News and others identified in Annex A.	Comments linking to the Nyungwe sites should be placed on these sites on a regular basis.	

3. Travel Fair Calendar of Actions

Table 11: Travel fair calendar of actions

MONTH	YEAR
	2012
September	Finalize preparations for WTM. Reconfirm ITB registration
October	Register for NY and UK Travel Shows; NTA Convention; Vakantiebeurs
November	WTM London
December	Finalize preparations for January shows
	2013
January	NY and UK Travel Shows
February	Finalize preparations for ITB
March	ITB: Register for the Arabian Travel Market
April	
May	Arabian Travel Market
June	Application for Adventure Travel World Summit
July	Register for WTM
August	Register for ITB
September	Finalize preparations for WTM; Reconfirm ITB registration
October	Register for NY and UK Travel Shows; NTA Convention; Vakantiebeurs

MONTH	YEAR
November	WTM London
December	Finalize preparations for January shows

APPENDIX A: SELECTED PRINT AND ONLINE MEDIA

1. Travel publications and websites

The following publications and websites have been targeted for the distribution of news and information about Nyungwe:

a. North America-based Target Publications and Websites

NAME OF PUBLICATION OR WEBSITE	DESCRIPTION	COMMENTS
Afar Magazine www.afar.com	AFAR is the multi-platform travel media brand that inspires and guides those who travel the world to connect with its people, experience their cultures, and understand their perspectives.	Could be a great fit for articles from Rwanda. Could also be a great source for a journalist on the Turkish Airlines familiarization trip.
Conde Nast Traveler www.cntraveller.com	Popular high end magazine and website	A few articles on Rwanda, but nothing on Nyungwe
www.Dreamscapes.com	Canada-based magazine and website distributed as a supplement to the Globe & Mail.	No coverage of Rwanda yet.
www.escapefromamerica.com	Online magazine aimed at Americans living abroad. Over 400k subscribers. Although the emphasis is on financial and household issues, travel pieces are included.	Since much of the market for Nyungwe is currently expats in Rwanda and surrounding countries, this could be a good site for the placement of Nyungwe content, particularly as told by an expat visitor to Nyungwe.
Fodors	Great travel resource, guidebooks. Similar to Lonely	Several notes posted on the Forum directing people to the

NAME OF PUBLICATION OR WEBSITE	DESCRIPTION	COMMENTS
	Planet	various Nyungwe sites.
Go World Travel	Features and photo essays on people and places from around the world, with reviews, news, tips and advice	In Interest Section “Natural Park” → “Land of a Thousand Hills” article on Rwanda. Place to comment. 0 comments.
Independent Traveler	Portal including advice on trip planning and other topics, travelogues, online forum, current travel bargains, and other resources.	Able to submit a “trip review” including photos. Nothing on Rwanda yet.
Outpost (www.outpostmagazine.com)	Canada-based, targeted at young independent travelers.	Some Rwanda coverage; none on Nyungwe.
<input type="checkbox"/> PlanetWare	Online guide offering resources in 97 countries. Includes navigation by geographic area, flight and hotel search.	Pretty good website but no info on Rwanda. The only submission area that I could see related to attractions and, according to their rules, you have to the proprietor or representative of the proprietor of the attraction. Odd.
<input type="checkbox"/> Rough Guides	Travel and music guide publishers; includes an online guide to destinations throughout the world, as well as a guide to various genres of music.	Love Rough Guides but nothing on site on Rwanda at all.
<input type="checkbox"/> The Expeditioner	Travel themed webzine featuring news articles and videos where you can find other travelers and discuss destinations.	Nothing on Rwanda but option to submit article or spot check on destination (not sure if this is targeted towards professional writers or just the everyday traveler).
<input type="checkbox"/> Transitions Abroad	Live, work, study, volunteer, or travel abroad. Online publication offers articles, information, and access to new guides in print.	Site targeted towards studying abroad, nothing on Rwanda.
<input type="checkbox"/> Travel Intelligence	Hosts and syndicates travel writing and travel writers from	Nothing on Rwanda and no place to submit articles.

NAME OF PUBLICATION OR WEBSITE	DESCRIPTION	COMMENTS
	around the world.	
Travel Weekly Web	Publication provides articles, links, and worldwide information on trade shows, corporate news, and transportation to those in the travel industry.	Targeted more towards aviation, MICE, etc.
Travel and Lifestyle	Canadian based publication covers wide variety of international destinations. Provides contact information and travel tips for each featured location.	No articles on Rwanda or places to comment/submit articles.
Travel with a Challenge	Volunteer, educational and workshop vacations for the mature and active traveler, with focus on nature, exploration and eco-tourism.	No sections on Africa.
TravelRag	International travel featuring articles on social, scientific, and environmental aspects of worldwide destinations; from the luxurious to rugged, publication includes diaries, poetry, and photo library.	Nothing on Rwanda. No comment section.
Travelmag	Monthly online magazine aimed at the independent or adventurous traveler.	Nothing on Rwanda.
Traveloscopy	Articles, news, contests, and links to international travel destinations and services.	Nothing on Rwanda.
USA Today - Travel	Travel news and information including travel tips, discount travel and specialty web deals.	Search site broken, could not find anything on Rwanda though.
Web62	Videos, photos, news and reports on select international destinations. Viewing is accessible through use of Internet video features.	Seems to be a general blog on Fashion, Travel, Lifestyle, etc. Nothing on Africa.

NAME OF PUBLICATION OR WEBSITE	DESCRIPTION	COMMENTS
☒ Where To Go Next	Daily travel newsletter containing features and summarized travel news linked to the expanded news items archived by date and category.	Articles on Eastern Africa, nowhere to place comments or submit stories.
☒ World66	Open source travel information with regional guides. Users can participate by offering hints and reviews. Includes travel tools.	Similar to Lonely Planet. Both a “guide” for Rwanda and Nyungwe but no place to comment or submit.
☒ World Hum http://www.worldhum.com/search/results/1d42c745adem/search/results/1d42c745adem/2192d36685ac0a2700a03/	Travel narratives, reviews, and links to travel media.	Pretty good website but no relevant articles to Rwanda to comment on (see link).

b. Rwanda and Regional Target Publications and Websites

NAME OF PUBLICATION OR WEBSITE	DESCRIPTION	COMMENTS
Kigali Life Yahoo User Group	User group mostly for expats living in Kigali. Over 6000 members.	A Nyungwe folder has been set up on the site. Members have received a message promoting the Nyungwe sites.
MBendi	Directory of services and links for travel in Africa includes accommodations, tour operators, and list of embassies.	Great resource for outside links (news on Africa, events, etc.) but nowhere to post or make comments.

c. UK-based Target Publications and Websites

NAME OF PUBLICATION OR WEBSITE	DESCRIPTION	COMMENTS
Geographical magazine	Magazine for the Royal Geographical Society	Interested in covering Nyungwe.
Country Walking and Trail -- Livefortheoutdoors.com http://www.livefortheoutdoors.com/Forum/	Offbeat source of travel info and equipment.	Nothing on Rwanda yet, but could be a good outlet for independent-oriented pieces. The Forum could be a good place to plant Nyungwe info.
National Geographic Traveler UK		Stuart Forster's blog posting
TNT Magazine	The home of the TNT magazine, based in London, UK.	Great site, some articles on Rwanda (gorilla trekking), log in to leave comments.
Travel Africa Magazine	UK-based publication. Travel destinations, wildlife, conservation and culture. Birding column included.	This is a decent website. I think articles can be submitted and there are places to comment (there were some "spot checks" on Rwanda).
Traveller – the Traveller's Club	quarterly publication of Wexas	Has a short but good section on Nyungwe
Wanderlust magazine	UK-based popular travel magazine, especially with independent travelers	Nyungwe already covered.

d. German-language Target Publications and Websites

NAME OF PUBLICATION OR WEBSITE	DESCRIPTION	COMMENTS
Abenteuer und Resien http://www.abenteuer-reisen.de/	One of the most popular travel websites and magazines in Germany. Half of the users are 30-49 years with above average education. More than a third has personal monthly net income of +2500 euros. The adventure-reisen.de users are disproportionately interested in travel / vacation. The website	Some coverage of Rwanda, but no coverage of Nyungwe yet.

NAME OF PUBLICATION OR WEBSITE	DESCRIPTION	COMMENTS
	receives 300,000 impressions a month. The magazine has 480,000 readers.	
Geo.de and GEO Magazine	Very popular travel and lifestyle website and publication.	Some Rwanda coverage, but nothing on Nyungwe.
TIP Profi-Reisen	Austria-based travel trade magazine and website.	Suzanne Hagen wrote articles about Nyungwe for the magazine.

e. International Target Publications and Websites

NAME OF PUBLICATION OR WEBSITE	DESCRIPTION	COMMENTS
Bradt Guides Rwanda page	Update page for the Bradt Guide to Rwanda	We are in contact with the author, Philip Briggs.
Lonely Planet: Rwanda	Provides a guide for visitors to the country including when and how to go, work opportunities, study, lodging, practical information and places to visit	Some articles on East Africa, nothing specific to Nyungwe. Can post comments and also participate in the forum (one question posted: “What is a fun, safe place to travel to in Africa?” One person’s response: “Uganda for fun, Rwanda for safety”).
Travel Daily News International	Daily newsletter for the travel and tourism professional around the world.	Similar site to eturbonews.com – collection of news stories relating to travel industry.
Travel Media Pros LinkedIn User Group (http://www.linkedin.com/groups?viewMembers=&gid=87439&sik=1340918309152&goback=%2Eanp_87439_1340916701631_1)	5,795 members	
TripAdvisor	Information on hotels, resorts and packages with reviews from travelers with star ratings.	

NAME OF PUBLICATION OR WEBSITE	DESCRIPTION	COMMENTS
Wikitravel	A project to create a free, complete, up to date and reliable worldwide travel guide. Destination guides and other articles written and edited by Wikitravellers from around the globe. Open editing by any reader.	Wiki on Nyungwe. We could add to it. Also on Rwanda wiki as well.

2. Special interest publications and websites

a. High-end Travel and Consumer Publications and Websites

NAME OF PUBLICATION OR WEBSITE	DESCRIPTION	COMMENTS
 Luxury Web	Monthly lifestyles and travel magazine dedicated to the art of living well.	Nothing on Rwanda. Not the best website either. Might be a target for a story on the Lodge.
www.luxurytravelmagazine.com	Online travel magazine focused on luxury offers.	Appropriate site to place a Lodge story.
American Association of Retired Persons magazine and website.	Audience of 37 MN 50+ members; travel is a favorite activity. High education and income levels.	Target for Nyungwe in general and especially a Lodge story.

b. Birding Publications and Websites

NAME OF PUBLICATION OR WEBSITE	DESCRIPTION	COMMENTS
http://www.birdforum.net/forum.php	116,506 members; one of largest birder forums	No Rwanda section yet.
www.birdwatchingdaily.com/	A popular US-based magazine	No Rwanda coverage yet.

NAME OF PUBLICATION OR WEBSITE	DESCRIPTION	COMMENTS
	and website dedicated to birding.	
www.Birding.com	Online guide to bird watching.	No section on Rwanda yet.
Birdlife International http://www.birdlife.org/ http://www.acnrwanda.org/	Birdlife International website and Rwandan affiliate.	Contact has already been made with them.
http://www.fatbirder.com/	One of most popular birding sites and family of birding sites in Europe.	Ditto.

APPENDIX B: STATEMENT OF WORK

Consultant Name:	Wayne, Scott	Position Title:	Travel and Tourism Marketing Specialist
Contract Name:	Strengthening Sustainable Ecotourism in and around Nyungwe National Park – Nyungwe Nziza (Beautiful Nyungwe)		
Contract Number:	AID-696-C-10-00002		
Period of Performance:			

BACKGROUND

Rwanda is an emerging tourist destination, and Nyungwe Nziza seeks to help the country reach its tourism potential. To do so, the project targets the spectacular and protected Nyungwe National Park (NNP), focusing on inclusive ecotourism development for the benefit of local communities surrounding the park, and leveraging private sector investment in the management, construction, and maintenance of new and existing park infrastructure.

The Nyungwe Nziza project is working to transform NNP into a viable ecotourism destination, capable of generating employment and sustainable and equitable income for local communities and other stakeholders, thus providing economic incentives to conserve the rich biodiversity of the Park. The ultimate goal is a thriving economy in NNP with engaged communities and a private sector that realize they can benefit economically by protecting and leveraging the unique environment in which they live and work.

However, Nyungwe is currently marketed and promoted as an add-on product to the gorillas by the majority of tour operators. Given the recent increase in the gorilla permit price, tour operators are concerned that they might have to sacrifice Nyungwe add ons in an effort to make their 'primate packages' more affordable to their clients. Hence there is an urgent need to develop a marketing strategy for Nyungwe which would position the Park as a self sustaining and standalone destination in Rwanda.

To help address this challenge and in following the Year 3 work plan, Nyungwe Nziza is seeking the services of SW Associates consultant Scott Wayne to work with the Rwanda Development Board (RDB) and Nyungwe Nziza to develop a strategy and plan to help market and promote

Nyungwe National Park as Rwanda's iconic destination, independent from the already famous mountain gorillas.

This work would build on the foundation work for the website and tourism market profiles conducted in September-October 2010, March-August 2011, and January-present, thus supporting the rollout of both off- and online marketing strategies. Included in this strategy would be strengthening of the technology for web-based and social media solutions to facilitate posting of photos and videos, documents by both staff and fans of NNP.

OBJECTIVES

The objective of this assignment is to conduct a thorough market analysis of constraints and opportunities in making Nyungwe a standalone destination and based on this analysis, develop a marketing strategy and plan that maximizes awareness and marketing efforts for NNP.

TASKS (PERFORMANCE REQUIREMENTS)

Under the technical oversight of Nyungwe Nziza's Chief of Party and Ecotourism Team Leader the consultant will undertake the following tasks:

Development of a Targeted Marketing and Promotion Strategy and Action Plan – Drawing on previous NNP market and related studies and the results of the price optimization study, combined with interviews with outbound tour operators in the United States and the United Kingdom, develop a marketing strategy and plan that applies the results of a thorough market analysis to maximize awareness and marketing efforts for NNP's three key market segments: bird watching, primate tourism and adventure. The strategy and action plan should focus on way and means by which RDB and Nyungwe Nziza can:

- Maximize exposure of NNP among international media and outbound tour operators who specialize in covering or selling wildlife and/or adventure packages in East Africa;
- Widen and expand NNP's market base in the main niche markets (UK, US, Germany and Netherlands);
- Increase consumer and trade awareness of NNP's biodiversity-based products in the US, UK, Germany and Netherlands markets;
- Increase availability of NNP's multimedia content in the public sphere.

The strategy and action plan will include but not necessarily be limited to the following elements:

- **Identification of Partnerships** -- Recommendations to RDB and Nyungwe Nziza for partnerships that intersect private sector goals and challenges with RDB's and USAID's development objectives for NNP;
- **Industry Event Participation** – A plan (including promotional materials and staff requirements) for better integrating NNP and related products and service providers into key travel industry events;
- **Media Planning and Product Development** - Recommendations on how the Nyungwe brand could be better strengthened and positioned especially through increased international media coverage and targeted product development efforts;
- **E Marketing** – Revise/adapt the previously developed Nyungwe Nziza's E-marketing strategy to better reflect RDB's needs and current staffing situation. This will consist of specific recommendations and guidance for developing innovative marketing mechanisms for NNP including but not limited to travel blogs and social network travel sites and linking these sites with other established travel websites, as part of the market outreach, especially to bird watchers and primate trackers;
- **Familiarization trips** – Recommendations on the organization (and participants) for familiarization trips to Nyungwe for travel writers, journalists and other key industry personnel.
- **Gorilla permit price increase impact on Nyungwe** – Develop a strategy and plan to help market and promote Nyungwe National Park as a standalone destination, independent from the famous mountain gorillas.

DELIVERABLES

Marketing and Promotion Strategy and Action Plan developed with RDB and Nyungwe Nziza that is focused solely on Nyungwe National Park and which incorporates (but is not necessarily limited to all the above elements);

A power point presentation and one half day workshop on the Marketing and Promotion Strategy for key stakeholders including RDB, USAID and the private sector; and

A consultancy report and on the above, summarizing findings, conclusions and recommendations for future activities related to this scope of work.

APPENDIX C: PERSONS CONTACTED

Contact List for Nyungwe Marketing Plan – August-November, 2012

The 14 Rwandan tour operators that offer tours to Nyungwe were invited to an RDB workshop led by tourism consultant Scott Wayne on August 29th. RDB staff and representatives from Volcanoes Safaris, Nyungwe Forest Lodge and Top View Hotel participated. The remaining 13 operators were then sent a survey by email and RDB marketing manager, Philibert Ndandali, said that he would follow-up in person with each operator. By late October, no responses had been received, so the consultant then called each operator and was able to interview the following: Amahoro Tours, Bizdanny Tours, Eagle Ride, Mapendano Voyages, and Primate Safaris. Discussions were also held with the following operators on the Rwanda stand at the World Travel Market November 5th-7th: Thousand Hills Expeditions, Volcanoes Safaris and Wildlife Tours-Rwanda.

Note: The consultant briefly discussed Nyungwe with Marcel Walter, the owner of Madendano Voyages, on October 25th, but the telephone connection was not good, so a new time was scheduled. Mr. Walter missed the October 26th appointment, but he did talk with Chief of Party, Jim Seyler. The consultant tried calling and emailing him again on October 29th, but did not receive a response.

HOTELS	
Gisakura Guesthouse	
Milles Collines, Kigali	
Nyungwe Forest Lodge	
Nyungwe Top View Hill Hotel	
Rwanda Development Board	
Kigali – RDB Tourism and Conservation	
RDB - Nyungwe National Park	

Tour Operators	
Amahoro Tours	
Bizidanny Tours & Safaris	
Eagle Ride	
The Far Horizon	
Mapendano Voyages	
Primate Safaris	
Thousand Hills Expeditions	
Volcanoes Safaris	
Wildlife Tours-Rwanda	