



BRANDING RWANDA AS TOURISM DESTINATION

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Branding Rwanda as tourism destination

What image do Rwandan tourism stakeholders want to promote abroad?

SNV Rwanda and RSM-Erasmus University

SNV

Connecting People's Capacities

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Acronym and Abbreviation

APEHOTOUR	: Association des Parents pour l'Education en Hotellerie et Tourisme
ATA	: Amahoro Tourism Agency
CAURWA	: Communauté des Autochtones Rwandais
CBT	: Community-Based Tourism
DMO	: Destination Management Organization
KIST	: Kigali Institute of Science and Technology
NGO	: Non-Governmental Organizations
ORTPN	: Rwanda Office of Tourism and National Parks
OTF	: On the Frontier Group
RTC	: Rwanda Tourism Centre
RTTO	: Rwanda Tourism Training Centre
STD	: Sustainable Tourism Development
SNV	: Sticing Nederlandse Vrijwilligers
UNWTO	: United Nations World Tourism Organization

Introduction

Rwanda has unique opportunities for tourism development. International travel guides often refer to Rwanda as 'the land of a thousand hills', or 'Africa's best kept secret'. The country has a rich biodiversity concentrated in its three national parks. Most popular is the Parc National des Volcans that hosts the rare populations of mountain gorillas that became internationally renowned through the film 'Gorilla's in the Mist', which featured Dian Fossey struggling for the protection of these primates. Despite this potential, Rwanda is not yet a tourism hotspot. The growth of international arrivals to Rwanda is 16%, well above the average of 13% for Sub Sahara Africa¹, but the number of incoming visitors in 2006 was estimated at a modest 30,000. Moreover, the majority of travellers that visit Rwanda do so for business purposes.²

The development of a tourism industry that is beneficial to the Rwandan economy faces two major challenges. Firstly, Rwanda is one of those Sub-Saharan African countries coping with a prevailing international image, which is a mix of poverty, violence and primitiveness. Rwanda is one of the poorest countries in the world, and extreme violence took place during the 1994 civil war. The genocide has been extensively displayed by the international media and the international film industry through a number of films, including 'Hotel Rwanda' and 'Shooting Dogs'. In contrast, Western tourism marketing literature tends to profile African countries as 'frontier' destinations, captured in a primitive development stage. Developing country destinations are generally depicted as 'amazing' and 'colourful', but, frontier countries are distinctively portrayed as 'strange', 'pristine', 'savage', waiting to be discovered and explored by adventurous tourists.³ In this image, the social dimension

is being reduced to stereotype presentations of staged, traditional activities, which ignore present-day aspects of society, the economy, and expressions of "high" culture, such as music festivals, architecture, fashion design, and literature.

The second challenge of tourism industry development is to link up to the international tourism markets in a manner that creates employment and income, and reduces poverty. The global tourism industry is dominated by foreign companies that usually maintain a minimum of linkages to local tourism service suppliers. To facilitate a higher local share from the global tourism value chain, and to ensure a more equal distribution of tourism revenues over the urban and rural population, local value chains that increase the local content in the supply of foreign tourists need to be developed. Involving local tourism stakeholders in the international (re-)branding of the country as a tourism destination is an important element in that strategy.

This report presents the results of a study on the tourism image perception among Rwandan tourism stakeholders. In the opinion of the stakeholders, what does the country have to offer foreign tourists? In 2006, data was collected in three different ways. Open interviews were conducted among 32 stakeholders from government agencies, tourism companies, non-profit organizations and rural communities. Subsequently, a series of 12 websites designed and maintained by Rwandan tourism stakeholders were analysed for their destination image content. Finally, a similar approach was followed for the analysis of 24 Rwandan postcards.

The report is organized as follows. The first section shortly explains some important, theoretical aspects of destination marketing and cooperation. Section two offers and explains a typology of four Rwandan tourism stakeholder groups. The subsequent section describes the opinions of these groups on several aspects of the Rwandan destination image. The analysis of the websites and postcards can be found in separate exhibits. The report ends with conclusions.

Destination marketing and cooperation : A few theoretical insights

In marketing management, the term 'destination image' refers to a series of associations that individuals or groups may have with a particular destination. The associations may be derived from objective knowledge, impressions, prejudice, imaginations, or emotional thoughts. A destination image can be formed *organically*, i.e. through media involvement, such as TV news channels, films and literature; or is *induced* through purposeful marketing by the destination. Because suppliers need to know what their market wants, tourism entrepreneurs must analyse the *perceived* image of their destination by potential tourists. If this perception does not fit that of their own, tourism service suppliers have to promote their own *projected* destination image in the target market in an effort to influence the perceptions of the potential customer. It is the perceived image that determines whether or not the tourist decides to visit a place. Understanding how tourists evaluate different destinations is therefore vital.

The process of destination-image formation is a challenging one because service suppliers have to bridge three image formation gaps.⁴

The *strategy gap* refers to the risk that the projected image is not structurally linked to the identity of place. This gap occurs when the image aired to tourists is not the one that is shared and supported by the population or the service suppliers in the destination.

The *delivery and supply gap* refers to the discrepancies between tourist expectations and their actual experiences. This gap occurs when destination marketers, such as tour operators, make promises on service delivery without having sufficient contacts and knowledge of the capabilities and capacity at destination level. The *demands specifications gap* involves differences between demands of the tourist market and the offerings by a destination.

The destination image positioning needed to bridge these three image formation gaps depends on the synergistic approach of stakeholders in the destination. A wealth of marketing literature exists about the benefits of cooperation between tourism stakeholders in view of their marketing strategy and communication and lobbying strength. Ideally, tourism service suppliers cooperate under the umbrella of a destination management organization (DMO). In reality, however, such concerted action is in most countries and destinations difficult to achieve, due to contradicting private interests or political and cultural controversies.

The lack of cooperation between different tourism stakeholders was a key issue addressed during the international tourism workshop on 'Government incentives for enhancing local economic impacts of tourism', organized by the Rwanda Office of Tourism and National Parks (ORTPN), SNV-Rwanda, and United Nations World Tourism Organization (UNWTO), in October 2006 in Kigali. In the African context, a collaborative approach between industry stakeholders is particularly difficult because of what in business literature is called the "segmented business system".⁵ The African segmented business system refers to the fragmentation of markets that consist of manifold business networks that function in a relatively isolated manner. Commonly, they include networks of foreign companies, networks of Indian or Lebanese businessmen, government networks, and networks of indigenous Africans, which may be further subdivided by distinct ethnic or religious identity. The African 'segmented business system', is featured by (a) the central role played by informal networks of the indigenous elite, (b) the concentration of activity in the metropolitan area, and (c) deep cleavages between export and non-export oriented sectors, and between formal and informal economic activity.

The fragmentation in networks and the wide gaps between them often result in distrust among entrepreneurs and high transaction costs. Since in the African context general institutional trust is also not well developed, cooperation between companies from different networks is often difficult and exposes business parties to greater risks. This situation also applies to the tourism service industry where divides may exist between stakeholder group networks. Bridging these networks is therefore a priority, with best examples serving as role models.

Tourism service suppliers in rwanda

In the Rwandan tourism sector, four stakeholder groups can be distinguished: (a) governmental authorities, (b) private tourism business, (c) supporting non-profit, non-governmental organizations (NGOs), and (d) communities. Each of the groups has a distinct role in developing tourism services. Table 1 explains their main characteristics.

Table 1: Four tourism stakeholder groups in Rwanda

	A. Public authorities	B. Private business
Selection criteria	Organizations under government control and involved in tourism	Private tourism companies based in Rwanda
Main stakeholders	ORTPN (state destination marketing organization)	Accommodations and tour operators (offering full tour packages)
Main partners	All stakeholder groups, but <i>de facto</i> primarily the private sector	Public and private sector stakeholders
Position in network	Main decision making body in the sector by coordinating and promoting valuable public resources; parks and permits	Influential, but also depending on direction of ORTPN and their coordination of permits and national parks
Location	Primarily in Kigali	Primarily in Kigali
Objective	Structuring the tourism industry and protecting against negative impacts	Improving the private tourism sector

	C. Non-profit support organizations	D. Communities
Selection criteria	Non governmental organizations (NGOs) that support community-based tourism in Rwanda	Local communities that offer tourism services as a local attraction in Rwanda
Main stakeholders	NGOs involved in local tourism development (mainly in Musanze district)	Local community initiatives of the Amahoro Tourism Association (ATA) in the Musanze district
Main partners	Public, private and community actors	Support NGOs & surrounding community
Position in network	Experienced 'intermediary' role between local suppliers (communities) and the public-private sector, or complementary in case of hotel schools, taxi association, etc.	Weak position in the main tourism network. Tourism knowledge mainly accumulated through cooperation with NGO's and one local tour operator
Location	Kigali	Primarily around Musanze
Objective	Alleviating poverty by facilitating tourism as an additional source of income for local communities	Improving living conditions in the community by developing tourism services as an additional source of income

In the context of the present study, 32 interviews were conducted with representatives of the four stakeholder groups. Table 2 provides an estimation of the total number of organizations per group, as well as the number of respondents that participated in the study.

Table 2: Number of interviewees and estimated number of organisations per tourism stakeholder group

	Public authorities	Business	Support NGOs	Communities
Estimated total # of organizations	20-40	80-100	20-30	15-20
Organizations interviewed (N)	7	8	8	9

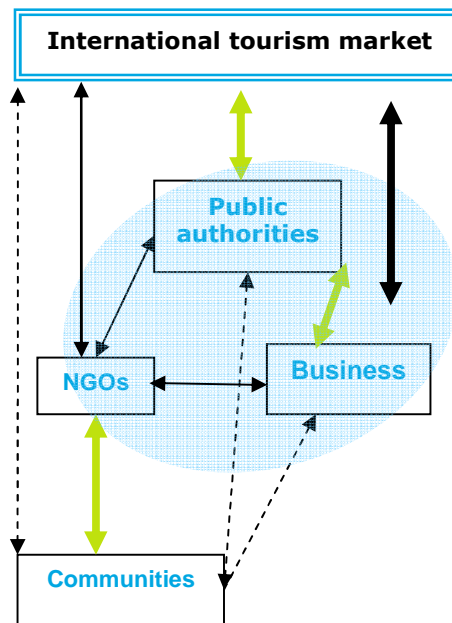
Stakeholder groups differ in terms of location, resources, tourism experience, and network access. The Rwanda Office of Tourism and National Parks (ORTPN) is located in the centre of the national tourism industry network. It has the authority to release the scarce and expensive gorilla tracking permits, and carries responsibility for the maintenance of all national parks. Since most of Rwanda’s tourism service supply banks on primates and parks, the tourism business relies on, and is well connected to the ORTPN.

A similar, relatively close relationship can be found between the communities and the NGOs that support them. Community tourism stakeholders are based in rural areas, particularly the Ruhengeri area near Parc des Volcans. Most of the communities are cooperating with the umbrella organization Amahoro Tourism Agency (ATA). Community-based tourism (CBT) is a relatively new phenomenon in Rwanda where tourism were previously highly focussed upon one product; the short visits to the mountain gorillas. Since 2005, international tourists that travel to the national park to observe gorillas are being encouraged to also pay a visit to nearby local communities. The CBT initiatives started receiving tourists in July 2006. The communities consider tourism as a new activity that should fit their daily customs and that could provide additional income. Among their tourism ‘products’ are banana beer brewing, traditional healing, traditional dancing & percussion, and art and craft work. Several non-profit NGOs are supporting CBT projects because community members lack previous experience in tourism service supply. They also face a language barrier in communication with foreign tourists as they speak the local Kinyarwanda, but no English and often no French.

A major difference between stakeholder groups is their geographic location. The public agencies, the companies and support-NGOs are based in the urban area in and around Kigali. They meet regularly and are to some extent intertwined with the international community. Some of them are foreign. In the interviews, the urban stakeholders revealed that the majority are fluent in English and have experience in other English-speaking countries, sometimes because they had lived abroad as refugees during the civil war. The CBT stakeholders, in contrast, mostly reside in the northern region of Rwanda and operate in relative isolation.

They are not easily reached, while community members themselves lack the means to frequently travel to the capital city, Kigali. The geographic distance is one of the reasons for the relative independent or marginal position that the communities hold in the national tourism network. Public officials claim to be collaborating with the communities, but during the interviews community members stated that such collaboration is not very effective. The communities claim not to be involved in tourism policy decision-making in Kigali. Moreover, the CBT projects hardly form part of round tours organized by private travel agencies. Figure 1 provides an impression of the relationships between the four stakeholder networks.

Figure 1 Impression of Rwandan tourism industry networks



The perceived image of Rwanda by tourism service supplier groups

Interviews were conducted with a sample of 32 representatives of the four Rwandan tourism stakeholder groups. The respondents were asked to give their associations through a series of open questions concerning the tourism image of Rwanda.

Tables 3-7 show the responses per stakeholder group on five questions. Each table lists the thematic associations that (a) respondents consider to be the most important, and (b) are most frequently mentioned. The associations may consist of individual words, sentences, or longer answers that focus on a particular theme. Through content-analysis software, all associations were first counted and then categorized in more general themes, such as 'people', 'turbulent', or 'wildlife'. In a third step, the themes were categorized according to selective codes according to the "4-A" typology of Echtner³: Attraction, Actor, Action or Atmosphere.

(a) Personal associations with the name 'Rwanda'

From Table 3, it can be concluded that the name 'Rwanda' is associated with Attractions and Atmosphere rather than with Actors and Actions. Public authorities, business and communities primarily associate the name 'Rwanda' with atmospheric issues. The authorities and communities point to Rwanda's turbulent past, i.e. the Genocide in 1994, but they also refer to the safe present and to Rwanda as their home. The business respondents associate Rwanda with the new dynamic (good governance, the reconciliation efforts) as a cause for the relative progress of the country in the past 12 years.

Attraction issues are particularly mentioned by the support NGOs. Rather than political issues, they associate Rwanda with its general attractiveness, i.e. the beauty of the country with its mountainous landscape. They also appreciate the resilience of the Rwandan population. One of the NGO respondents explained: "Look where they were 12 years ago and where they have pitched themselves up now. You can align this with the Rwandan traditions that are unique."

Table 3: Associations with the name 'Rwanda', by stakeholder group*

	All	Public	Business	NGO	Community
Attraction	16	1	2	11	2
Beauty			1	6	1
People				4	
Actor	0				
Action	0				
Atmosphere	22	7	5	2	8
Turbulent		3	1		4
Home		2			2
Safe		2			2
New dynamic			2		
Climate				2	

* Listed are the associations that respondents considered to be the most important ones. In some cases, respondents insisted that there were two. Theme totals are in bold. Other figures do not necessarily add up to these totals, because only the most frequently mentioned associations are listed

(b) Assumed foreign perception of Rwanda

The interviewees were asked about how they think foreigners perceive Rwanda. Again, the associations concern Attractions and Atmosphere, not Actors and Actions. Table 4 indicates that atmospheric associations with 'turbulence' exceed associations with attractions. All stakeholder groups assume foreigners think of Rwanda as an insecure, violent destination; a country in despair. In the perception of public authorities and tourism business, this is the primary foreign association of those who have never visited the country.

According to one of the entrepreneurs: “Some of the foreigners only have knowledge of what happened 12 years ago. But when they arrive in Rwanda, they are all quite surprised with what they encounter here.” Communities distinguish themselves from the other groups because they hold a far more optimistic assumption that foreigners also associate their country with attractions related to wildlife, culture, and the people.

Table 4: Assumed foreign perception of Rwanda, by stakeholder group*

	All	Public	Business	NGO	Community
Attraction	8	0	0	--	8
People					4
Wildlife					2
Culture					2
Actor	0				
Action	0				
Atmosphere	11	5	4	--	2
Turbulent		5	3		2

* This question was not asked to support NGOs

(c) Best personal leisure experience

The question about the best personal leisure experience in the country provided mainly associations with attractions (places to go to) and actions. Table 5 shows that business and support NGOs tend to emphasize attractions, while public authorities and communities primarily mention actions. Business respondents point to the parks and wildlife, while the NGOs find their best personal leisure experience in cultural elements (culture, people and diversity). Community stakeholders also consider the gorillas (covered by the word wildlife) a great experience. Several community respondents added that this is an experience they only dream of. In the words of one interviewee: “We have some pictures of the gorillas, and we get really excited about them, but will probably never see the creatures ourselves. I would personally like to go. I am still waiting to get enough funds to go and see for myself.”

Government and community stakeholders prefer leisure through relaxation amongst family and friends. Communities do not name parks explicitly; they rather (inexpensively) stay at home or visit their relatives. The personal leisure question was often misunderstood by community respondents as they almost never go to places of general interest due to financial constraints. Several other respondents suggested that the Rwandan people are generally unaware of what can be experienced in their country due to restricted travelling exposure.

Table 5: Best personal leisure experience in Rwanda, by stakeholder group

	All	Public	Business	NGO	Community
Attraction	19	4	7	6	2
Parks		3	4		
Wildlife			2		2
Culture		1		2	
Diversity			1	2	
People				2	
Actor	1	0	0	0	1
Action	15	6	2	0	7
Relax		2	2		4
Learning		2			1
Camping		2			
Atmosphere	1	0	0	1	0

(d) Distinctive feature in the East-African context

Rwanda is located within a region internationally renowned for its wildlife and nature. In the opinion of the interviewees, should tourists in the region also travel to Rwanda for another unique experience? Table 6 shows that respondents assume Rwanda to differ in terms of atmospheric elements from neighbouring countries. Business and NGO respondents emphasize that it is safe for foreign tourists to travel in Rwanda.

Communities primarily focus on the developing stage of the tourism industry in Rwanda as a prime difference. For them the question was difficult to answer as none of the community interviewees had ever visited other countries although they often live close to the border.

Public authorities associate mostly with attractions. With the business and NGO stakeholders, they share the focus on the unique population of mountain gorillas in Northern Rwanda. One public official said "I think we differ in terms of the gorillas. You cannot experience them everywhere, and especially in Rwanda, the experience is relatively the best".

The 'people' are also perceived as distinctive feature of Rwanda by the three urban-based stakeholder groups. Language, hospitality, and their positive attitude were mentioned relatively frequently. Public stakeholders also point to a new dynamic in public administration: good governance, well-organized, and the clean public space. Finally, they appreciate small-scale tourism rather than 'mass tourism' that can be found in many other destinations in East Africa.

Table 6: Distinctive feature of Rwanda within East Africa, by stakeholder group

	All	Public	Business	NGO	Community
Attraction	11	6	3	2	0
Wildlife		2	2	2	
Diversity		2			
Similar		2			
Actor	6	2	2	2	0
People		2	2	2	
Action	2				
On foot			2		
Atmosphere	33	3	9	13	8
Safe		1	4	6	
Developing					6
New dynamic		2	1	1	
Comfortable				2	2
Sustainable			2		
Opportunities				2	
Turbulent				2	

(e) Preferred image projection

The respondents were finally asked their opinion about the features of Rwanda that should be included in websites and brochures and other marketing material to attract more foreign visitors. From Table 7 can be concluded that 'Attraction' associations by far outnumber all others. At this point there is little difference between stakeholder groups. The gorillas (wildlife) emerge as the key attraction of the country. Consensus also seems to exist on the inclusion of the image projections: 'nature', encompassing references such as "the mountainous landscape" and "the mysterious and peaceful Lake Kivu", and 'diversity', the variety of attractions in the country, such as wildlife, beaches, culture, and the 'people'. Major differences of opinion can be found in respect of the importance attributed to cultural and safety elements. Community stakeholders value culture-related aspects far higher than the other three stakeholder groups.

The second category is Atmosphere where the importance of stressing safety is acknowledged by all stakeholder groups. Safety seems to have a higher priority among public and private sector stakeholders, presumably because they are best informed about the concerns in the international tourism market. Other recurring atmospheric themes include 'comfort' in travelling through Rwanda (by urban stakeholders) and the hospitality of the Rwandan people (mainly by public and private stakeholders). The word 'hospitality' should be understood to literally refer to the warm welcoming attitude of the population rather than to a high standard of accommodation services. The sub-standard service level is considered to be the number one frustration of both the public and private sector stakeholders. The interviewees often expressed their appreciation for Rwandan training facilities of higher hotel staff. Training of the middle-management was considered to be very limited.

Table 7: Preferred image projection Rwanda, by stakeholder groups*

	All	Public	Business	NGO	Community
Attraction	116	22	28	23	43
Nature		4	6	5	9
Culture		4	1	3	14
Wildlife		5	5	3	8
Diversity		6	4	5	2
Parks			6	4	5
People		2	4	3	5
Genocide		1	2		
Actor	12	4	4	0	4
Hospitable		4	4		2
Language					2
Action	6	1	2	2	1
Adventure			1	2	1
Atmosphere	43	14	14	8	7
Safe		8	6	2	3
Opportunities		2	2	2	1
Comfortable		2	3	1	
New dynamic		2	3	1	
Developing					2

* In this question, respondents were asked to give their five most important associations

Conclusions

Enhancing the local content in the tourism value chain is required to increase the economic benefits of international tourism for Rwanda. An important element in such a strategy is the acquisition of marketing functions in the tourism chain. Whereas the marketing of Rwanda as a tourism destination is presently dominated by the images of foreign tour operators, travel guides, international media, and the film industry, the Rwandan tourism stakeholders may want to use websites, brochures, and postcards to project, in part, a different destination image abroad.

To reduce the risk of a *strategy gap* in destination image formation, it is important that the projected identity of Rwanda in the outside world fits the self identity of the Rwandan population. This study explored the most important elements that make up this self identity: Wildlife and nature; hospitality, culture and heritage; turbulent past and present safety. These elements are generally valued by all four tourism stakeholder groups. A high degree of consensus also seems to exist in respect to relaxation. None of the stakeholder groups intends to stress active holidays in the projection of Rwanda as a tourism destination. On the tourism websites, there are also notable differences. The turbulence and safety issues are particularly addressed by public authorities and tourism business. They are probably most realistic about the foreign perception of Rwanda and tend to consider the communication of the present safety and new political dynamic as a *sine qua non* for a further growth of international tourist arrivals. Differences could also be found in respect to attractions. Public authorities and tourism business tend to value particularly parks and wildlife, a finding that was supported in the analysis of tourism websites (see exhibit 1), whereas human elements are promoted by community stakeholders, at some distance followed by the NGOs. The latter two stakeholder groups tend to attribute a higher value to 'culture', 'heritage' and 'people' as potential tourist experiences than do the public and private sectors.

The finding of the different self-image among tourism stakeholders is relevant for two reasons. Firstly, the promotion of Rwanda as a 'no longer violent' and pristine natural reserve ready for discovery by the adventurous tourist, resembles the dominant stereotype image of foreign tour operators (see also exhibit 3). The limitation of this image is that it neither reflects Rwanda's recent economic and social developments nor its social and cultural diversity. The stereotype image simply ignores present African societies - the way people live, how they think, and what they create. A more local re-branding of the country as a tourism destination away from the dominant stereotypes may therefore be considered desirable. Taking into account the increasing interest among international tourists in learning experiences next to leisure activities, the wilderness bias may underutilize valuable opportunities for tourism service supply development. The community and NGO stakeholders intend to provide a more balanced image that could receive attention.

Secondly, the connection between stakeholder groups residing in the urban area of Kigali and the rural tourism service suppliers seems very weak. In particular, the networks of the communities seem to have a thin connection with those of the government authorities and the private tourism business, a result that was also confirmed through other research.⁶ This situation entails the risk of a non-inclusive tourism development. In most African countries, tourism development is led by a select group of urban specialists including governmental authorities and the major hoteliers. Because cooperation with small tourism service suppliers upcountry is often lacking, the latter tend to play a marginal role in national tourism strategy development. This holds especially true for small private accommodations and community tourism projects. The pro-active inclusion of these small-scale service suppliers in tourism development is important to broaden the country's arsenal of tourist attractions, and to let tourism development reach out to the poorer population in the country.

Exhibit 1: Destination image projected via Rwandan tourism websites

The table below summarizes the results of a content analysis of 12 websites of private Rwandan tour operators. Displayed are the themes that are mentioned most often, listed in frequency order.

The dominant theme that is referred to on Rwandan tour operators' websites is 'wildlife'. No other theme is mentioned as often. This finding is also reported in other research on other African countries.⁶ Each Rwandan tourism website highlights gorilla tracking services that are mostly sold as a distinct package for a "lifetime" experience that needs to be undertaken "under escort" of experienced guides.

Destination image projection on websites of Rwandan tourism organizations

Attraction	Actor	Action	Atmosphere
Wildlife (114)	under escort (8)	Experience (82)	Amazing (20)
Parks (51)		Journey (19)	Sensual (19)
Culture (41)		Discover (17)	Best (10)
Heritage (38)		Indulge (12)	Past (9)
Nature (35)		Do (10)	Challenging (6)
Lakes (31)		Learn (8)	Amiable (5)
Kigali (11)		Observe (3)	Pristine (4)
Diversity (3)			Gentle (4)
			Mystical (3)
			Majestic (3)

Other primates, such as the golden monkeys in Parc des Volcans, or the chimpanzees and colobus monkeys in Nyungwe Forest also appear in the itineraries. The Parc des Volcans in the north is most often mentioned, however. The third main attraction mentioned on the websites includes the local cultural heritage, while the mountains and volcanoes (nature) and the 'serene' view of the twin lakes are also often featured on the websites' menu.

The Action 'experience' refers to both visits to gorillas and communities. The majority of tourism business websites point to the possibility of visiting local communities. However, tourists are basically expected to observe. Visiting time

is limited, and invisible divides between the tourists and the local population may limit close interactions.

'Journey' and 'discover' are two other Action themes that are communicated via the websites. They refer to either the game drives in Akagera Park or boat excursions to one of Rwanda's lakes, particularly Lake Kivu. These associations, too, represent rather passive actions; very different from the less frequently mentioned 'do' themes like swimming, golfing, and climbing.

Besides 'amazing', Rwanda is often qualified as 'sensual', with references to the beautiful landscapes, the hills, the 'towering' volcanoes in the north, the 'peaceful' lakes, and the 'mysterious' dark forest in the South East (Nyungwe). The websites relatively often mention atmosphere elements, including the theme 'ancient' (past). The special attraction in this context is the city of *Huye*, formerly known as Butare, and *Nyabisindu*, previously known as Nyanza, which was the traditional seat of Rwanda's feudal monarchy.

Exhibit 2a: What image message do Rwandan Postcards send abroad?

Postcards are an interesting element in destination image formation, although under-researched. They do not have elaborate textual contents, but the clear camera images give receivers the impression of a close experience of real life. Postcards images are often trusted, and this makes postcard photography a valuable medium in destination image formation and tourism development.⁷

In the context of the present study, 24 Rwandan postcards could be collected (See exhibit 2b). Most of them (88%) are published by a private travel company in Kigali. The visual representations on the postcards were categorized and analyzed in line with the 4-A's model. The limitation of analyzing visual rather than textual content is that it is the researcher who subjectively translates images into words, which may cause bias. In order to enhance the reliability of the analysis, all pictures are included in this report.

Destination image projections on Rwandan postcards

Attraction	Actor	Action	Atmosphere
flora (11)	local (5)	leisure (7)	beautiful (13)
lake (7)			exotic (11)
people (5)			mystical (6)
			pristine (5)
			luxurious (5)

The postcards mainly show images that can be categorized either as attraction or atmosphere. Attractions are dominated by 'flora' related images (flowers, landscape) majority of which are depicted in a lake environment. The Kigali golf course (action) is depicted relatively often (four cards). In the category Atmosphere, the pictures associate Rwanda most with 'beauty', 'exotic' and 'mystical'. The 'Gorillas' or other 'wildlife' dominate the postcard images; 'people', 'culture' (buildings), and 'action' (golf) are almost equally represented. Hence, the collection of postcards offers a relatively diverse image of the country.

Exhibit 2b: Rwandan Postcards



Exhibit 3: Foreign Perceptions of Rwanda

To analyse the foreign destination image of Rwanda provided by international travel guides, two prominent guides were selected: the *Bradt Travel Guide* and the *Lonely Planet East Africa*. They were submitted to a content analysis. A large number of different associations in the texts were identified first. Then, all characters in the sections of the text that were directly related to these associations were summed. The associations were later grouped into themes ('Park', 'Do'), and then assigned to one of the four 'A' categories.

Guide book associations with Rwanda in terms of text space devoted to specific themes

In number of characters

Attraction	Char. #	Actor	Char. #	Action	Char. #	Atmosphere	Char. #
Park	75,211	Private vehicle	4,754	Do	10,746	Genocide	88,018
City	66,076	Guidance	3,459	Experience	9,652	Best	11,114
Wildlife	55,524	Adventurous	1,308	Observe	6,414	Sensual	9,873

The dominant foreign guide book image of Rwanda is a typical African destination image. On the one hand, the books offer a picture of a country teeming with wildlife, 4-wheel drive guided tours, active experience and a serene atmosphere. On the other hand, the guide books extensively discuss violence during the Genocide of 1994. Actually, the space devoted to the civil war (almost 90,000 characters) exceeds the space spent on the country's national parks (75,211 characters).

The image provided by the guide books is in part different from what tourists reportedly experience. Two Rwandan studies on the perceptions and demands of foreign travellers have recently been published. The Kigali Institute of Science and Technology (KIST)¹ carried out a survey among 155 visitors, including 90 business travellers. The visitors were asked (a) to rank the Rwandan attractions they were interested in, and (b) to estimate the costs for these experiences. The KIST researchers found that the tourists particularly appreciate ethnic/cultural attractions found in rural areas which are also low cost attractions. The second study involved a survey among 508 tourists and 42 international tour operators by the Kigali-based non-profit organization Sustainable Development through Tourism (SDT)⁸. The main finding in this study is that the images of Rwanda displayed by international tour operators differ considerably from the perceptions of travellers that actually have visited Rwanda. Whereas the tour operators hold a cautious attitude, the visitors turn out to be much more positive. They said they felt safe and liked the hospitality and the peaceful environment. The visitors also showed great interest in cultural and heritage attractions of the country besides nature and wildlife.

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Appendix

List of interviewees

ORGANIZATION	NAME	LOCATION	FUNCTION
Amahoro Tours	Gregory Bakunzi	Ruhengeri	Managing Director
Rwanda Safaris	Ronald Rutehenda	Kigali	Managing Director
Albertine Safaris	Ernest Ntagozera	Kigali	Managing Director
Kiboko tours and travel	Rajan Tiwari	Kigali	Managing Director
Silverback Adventures / RTTO	John Kayihura	Kigali	Managing Director
On the Frontier Group (OTF)	Joan Mazimhaka	Kigali	Junior Consultant
Hotel Gorillas	Emmanuel Rusera	Kigali	General Manager
Hotel Milles Collines	Patrick Knipping	Kigali	General Manager
ORTPN	Emmanuel Werabe	Kigali	Tourism research & development manager
ORTPN	Rica Rwigamba	Kigali	Executive Director
Rwandair Express	Manzi Kayihura	Kigali	CEO
Government Karongi district	Jean Babtiste	Kibuye	Vice-Mayor
Gisakura Tea Estate	Narcis Bucyana	Gisakura	Director
Dutch Embassy Rwanda	Anthe Vrijland	Kigali	Private sector advisor
National Museum Butare	Jean Jacques Nsanzabaganuwa	Butare	English speaking guide
Atavorwa (taxi mini-bus association)	Klebert Rukimbira	Kigali	President & driver
SNV-Rwanda	Dominique Verdugo	Kigali	Tourism advisor
STD	Michael Grosspietsch	Kigali	Managing Director
Dancing Pots	Jean Munyaneza	Kigali	Managing Director
CAURWA	Zephirin Kalimba	Kigali	President association
Apehotour (tourism school)	Ernest Safari	Kigali	Director association
RTC (tourism school)	Peter Oluoch	Kigali	Director

Project Rwanda	Jared Miller	Kigali	Project manager
ATA (Lake Burera island)	Japhet Ntahobari	Ruhengeri	Chairman / resident of Birwa island
ATA (banana handicrafts)	Uwimana Alphonsine	Ruhengeri	Banana handicrafts - wife of president ass.
ATA (banana beer making)	Febronie Kambabazi	Ruhengeri	Banana beer / vice-president
ATA (orphanage Rwaza)	Marie Mediatrice & Marie Deo-gratias	Rwaza	Teacher & former nun
ATA (traditional healing)	Davide Bizimana	Kinigi	Traditional healer & president
ATA (traditional dancing/drums)	Jack Mutemberezi & Martin Nizeyemama	Ruhengeri	President & dancer
Restaurant Karisimbi (Ruhengeri)	Augustin Nzabana	Ruhengeri	Managing Director
UBWUZU	Blandine Kumuyumba	Byumba	Manager protestant church centre
Crafts village Viaki	Jean Basco Sibonmana	Nyanza, Huye	Chief wood-carver

