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The Potential Impact of Domestic Tourism on Rwanda's Tourism Economy

Joan Mazimhaka

A research report submitted to the Graduate School of Humanities, University of the Witwatersrand, Johannesburg, in partial fulfilment of the requirements for the degree of Master of Arts by coursework in Tourism Studies

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ABSTRACT

As a continuously growing industry worldwide, tourism has often demonstrated its role as a vital tool in the advancement of economies through direct domestic and foreign exchange earnings and through the employment and investment opportunities it can generate. African countries, mainly in sub-Saharan Africa, often over-reliant on one or two sectors for economic development, have recognised the potential of the tourism industry to diversify local economies and contribute to poverty alleviation, economic regeneration and stability, affording many Africans the opportunity to participate in and benefit from tourism.

The participation of local populations in Africa's tourism industries, however, is often limited to employment opportunities. Travel by local tourists is often overlooked by members of the tourism industry, and is often considered a luxury by many in the local population. The role of domestic tourism and its importance for the creation of a sustainable tourism industry has been widely acknowledged, but limited writings on the subject exist and few tourism policies include domestic tourism, neglecting its potential.

The emergence of a new African middle-class, equipped with more of a disposable income and influenced by Western lifestyles, has proven that such potential does in fact exist. Those living in Africa as well as members of the Diaspora have shown more of an interest in leisure travel and represent a new tourism market. Globally, the impact of domestic tourism has been shown to have had a great impact on the tourism economies of several countries, demonstrating that African countries can only serve to benefit from participating in domestic tourism.

This research report provides a case study of Rwanda, an African country emerging from war and devastation, aiming to rebuild itself economically, socially and politically. The country has chosen tourism as one of its main economic drivers for poverty reduction and economic development. While the industry is succeeding, an over-reliance on international visitors in such a volatile region threatens the sustainability of the industry. The development of a domestic tourism industry, as has been demonstrated in other countries, offers the opportunity to generate a more diverse and economically sustainable domestic tourism industry. This research focuses on the potential impact of such a domestic tourism industry on Rwanda's tourism economy and as a result, on the country's economy as a whole.

DECLARATION

I declare that this research report is my own, unaided work. It is being submitted for the degree of Master of Arts (coursework) in Tourism Studies at the University of Witwatersrand, Johannesburg. It has not been submitted before for any degree or examination in any other university.

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Name

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Date

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Chapter 1
Introduction

1.1 Context

Tourism is defined by Woods, Perry and Seagull (1991, p.2) as essentially an export industry that provides domestic services and experiences of domestic resources to foreign consumers in exchange for foreign currency. Instead of staying home and importing goods and services, tourists visit the exporting country and enjoy the experiences and activities on site. Tourist expenditure, therefore, enters directly into the domestic economy through the firms and activities that cater to tourist needs. Countries the world over, particularly developing countries with fledgling economies, have come to recognise the importance of tourism to local economies. Tourism has thus become one of the fastest growing industries in the world. This introductory chapter builds a case for this recognition of the importance of the tourism industry to world economies, and of domestic tourism in particular to the developing world. The chapter begins with an analysis of the global tourism industry and a focus on the effects of tourism on developing countries, providing a backdrop for a discussion on the impact of domestic tourism worldwide and its potential to boost the economies of developing countries. The discussion leads to a brief exploration of the role tourism has played in Rwanda as a developing country, providing the rationale for the growth and development of the industry through increased attention to, and promotion of, domestic tourism. The Introduction also highlights the aims and objectives of this research, specifically the potential economic gains that could accrue from increased domestic tourism for Rwanda, a case study of a poor developing world country. The final section of this introductory chapter provides an outline for the structure of the research report.

1.2 Problem Statement

As one of the world's fastest growing industries, the tourism industry creates jobs and contributes significantly to the growth of economies, especially in developing countries. Expected to overtake agriculture as the world's largest industry by 2010, it has been

widely acknowledged that economic benefits arising from the tourism industry such as an increase in foreign exchange earnings, employment, and income generation, can overcome many resource problems as well as create opportunities and improve the quality of life of local populations (UNEP, 2001).

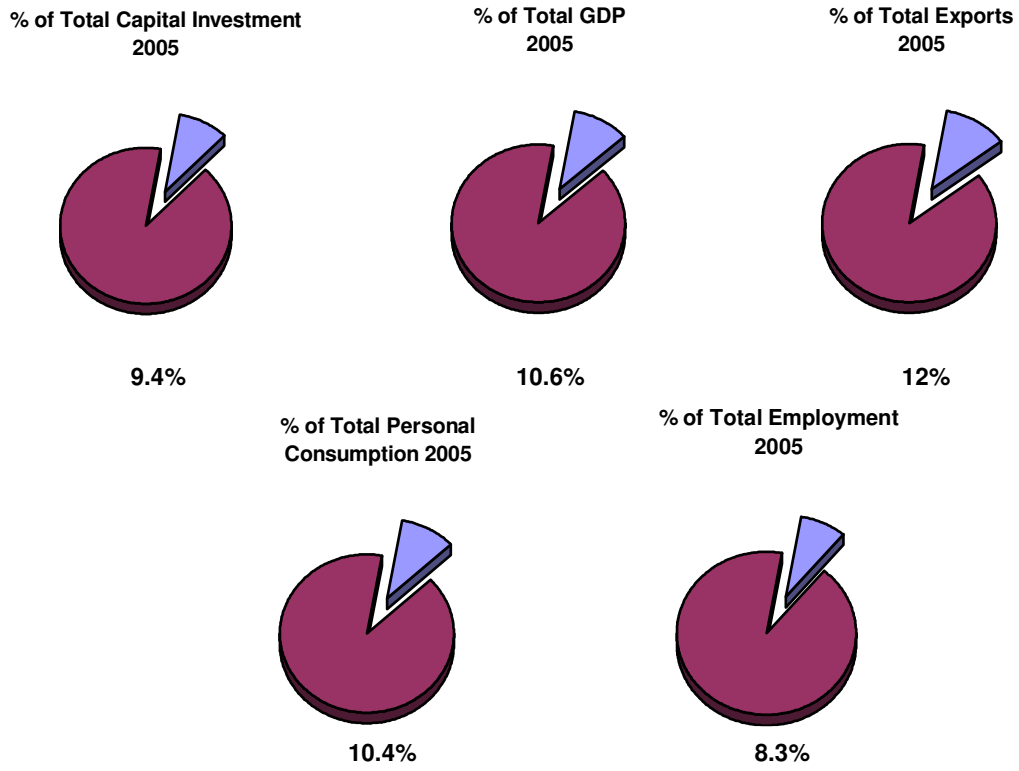
As the global tourism industry continues to grow, African countries, particularly in sub-Saharan Africa, are also experiencing significant growth rates. Although there are several hindrances that threaten the growth and development of the industry, it must be acknowledged that tourism still remains one of the few viable policy options left for many African economies and must be maximized on in spite of the constraints experienced by, especially, the developing world (Christie and Crompton, 2001, p.15). The importance of tourism as a policy option for developing countries, therefore, cannot be overemphasized. As Mitchell and Ashley (2006) assert, "tourism expansion is associated with accelerated economic growth, job creation and welfare, improved exports and public finances." The tourism industry has a growth rate that supercedes that of most other goods and services. As globalisation and leaps in communications and technology make the world a smaller place, a stronger tourism environment has emerged allowing people to experience and enjoy other cultures, create economic and social ties with a variety of communities, and broaden and diversify their lives. Once considered an activity to be enjoyed only by a small group of elites, tourism has gradually become a mass phenomenon reaching large numbers of people throughout the world. Not only is tourism beneficial for individuals, the industry greatly contributes to national economies and to the global economy as a whole.

The economic development of the industry on an international scale is often influenced by broad-based economic change, multi-national and international institutions' influence on tourism investment and development, and political influences that prohibit or allow travel to specific global regions (Milne and Ateljevic, 2001, p.372). The international tourism industry has become a global economic force, generating significant revenues and contributing directly and indirectly to national economies. The World Tourism Organisation (WTO) indicates that in 2002, 703 million tourists travelled across international boundaries, generating over US$ 474 billion in revenues. In its tourism growth forecast, *Tourism: 2020 Vision*, the WTO also predicts that the tourism sector will grow by an average of 4.1% per year over the next two decades, surpassing a total of 1

billion international tourists by the year 2010. Projections for the year 2020 indicate that tourist arrivals will grow to around 1.6 billion with earnings of up to US$ 2 trillion (Milne and Ateljevic, 2001; Neto, 2002; NEPAD, 2004, p.3).

The rapid and steady growth of the tourism industry has meant that many governments are recognising the significance of tourism and are looking towards the benefits the industry can bring, and indeed, as a constant contributor to economies worldwide, tourism's influence on a global scale needs to be acknowledged. The World Travel and Tourism Council's (WTTC) summary of the travel and tourism industry's impact in 2005 is shown in Figure 1.1 below:

Figure 1.1 Impact of the Tourism Industry on the Global Economy 2005



Source: *The 2005 Travel and Tourism Economic Research*; World Travel and Tourism Council, 2005

The figure above highlights several critical influences of the industry on the global economy:

- Tourism's capital investment in 2005 is estimated at US$ 918.0 billion or 9.4% of total investments;
- The tourism industry's direct contribution to the world economy is at 3.8% of total GDP, with the combined direct *and indirect* impact of the tourism economy reaching 10.6%;
- In 2005, the industry was expected to generate 12% of total global exports, an equivalent of US$ 1,512.5 billion, emphasising its continual influence on the global economy;
- Despite terrorist threats and several natural disasters, personal travel is estimated at US$ 2,833.1 billion or 10.4% of total personal consumption in 2005;
- Finally, in terms of employment, tourism is estimated to have totalled 8.3% of total employment or 1 in every 12 jobs worldwide (WTTC, 2005a, p.3).

The rapid expansion of international tourism means significant employment creation is a critical aspect of tourism. As established by the United Nations Environment Programme (UNEP), the tourism industry generates "substantial economic benefits to both host countries and tourists' home countries" (UNEP, 2001). The main motivation for host countries, particularly in developing countries is to generate economic benefits, and sustainable employment opportunities for local communities, is one way of doing so. *Sustainable* employment opportunities are critical, particularly in countries dependent on tourism as a major economic sector. According to the WTTC (1991, p.1), tourism is expected to generate, both directly and indirectly, 255 million jobs worldwide by 2010. Directly, tourism generates jobs through hotels, restaurants, nightclubs, taxis and souvenir sales. Indirectly, the industry creates employment through the supply of goods and services needed for tourism-related businesses (UNEP, 2001).

In spite of these positive trends, however, there are certain constraints that hinder the steady growth of the industry. Some view tourism as being elitist, providing menial seasonal employment and causing environmental and social degradation (Mitchell and Ashley, 2006, p.1). In addition to these negative perceptions existing within the industry, other risks threaten its growth. As highlighted above, personal travel has continued to grow despite external threats to the industry, but its volatility remains one of the most significant constraints to tourism development. UNEP (2001) stresses that over-reliance on tourism, especially mass tourism, carries significant risks to tourism-dependent

economies. Sudden changes in consumer tastes and sharp economic downturns are some examples of external forces that cannot be controlled by tourism dependent nations. This becomes a danger for countries that rely heavily on tourism. In The Gambia, for example, 30% of the workforce depends directly or indirectly on tourism, and in small-island developing states, percentages range from 83% in the Maldives to 34% in Jamaica and 21% in the Seychelles (UNEP, 2001). Less diversified economies that increasingly depend on tourism increase their vulnerability to international shocks such as natural disasters, regional wars and other unexpected events (Neto, 2002, p.6). After such shocks, immediate effects tend to be felt on tourism-dependent economies, meaning that countries must seek to diversify their economies in order to ease the potential damage that can be caused by such shocks.

Regional and domestic tourism have often been cited as potential 'solutions' for countries overly dependent on international tourism, hence the need to improve the domestic tourism sector, especially in developing countries. Domestic tourism accounts for approximately 80% of all tourism activity worldwide (Dieke, 2000, p.16; Neto, 2002, p.2). According to Ghimire (2001, p.2), some authorities estimate that the number of domestic tourists may soon be as much as ten times greater than the current international arrivals, particularly as there is a rapidly rising trend in domestic tourism in some developing countries.

This upward trend notwithstanding, "governments of most developing countries would rather promote international instead of domestic tourism (Dieke, 2000, p.16). In many developing nations, priority is still given to international tourism often at the expense of the domestic because of the much-needed foreign exchange earnings the industry generates for the host country. For several decades now, the promotion and progression of tourism in developing countries has been based primarily on the attraction of international tourists, with domestic tourism playing a less considerable role in tourism planning and development. This is particularly relevant in African countries where the importance of foreign exchange earnings is still the dominating factor for creating and maintaining a tourism sector. This means that most tourism strategies are still geared towards European, American and other foreign markets that continue to be attracted by the continent's diverse people and natural environments. As a continual generator of foreign exchange earnings, the tourism industry currently ranks third in Africa after

telecommunications and agri-business in terms of attracting foreign investment (Business in Africa, 2004). As African tourism continues to grow, however, inconsistencies within and threats towards the global tourism industry indicate that focusing solely on international tourists can prove detrimental. While domestic tourism does not provide the same opportunities, it does lead mainly to a wider distribution of national income (Dieke, 2000, p.16), providing business to smaller enterprises throughout the country, and ensuring the sustainability of the industry. While the growth of international tourism is critical for economic growth and income generation, the development of previously neglected domestic tourism markets in developing nations in particular can bring stability to a volatile industry and create a more sustainable tourism market.

The impact of domestic tourism varies greatly between developed and developing countries, with several developed nations in Europe and North America experiencing domestic tourism numbers that often surpass international tourism numbers. For example, in the United Kingdom (U.K.), around 85% of the nation's tourism income in 2003 came from domestic tourists. In this same year, domestic tourists spent around £26.4 billion or US$ 46.2 billion compared to around £11 billion or US$ 19.2 billion spent by overseas tourists (Visit Britain, 2004). This major contribution to the country's tourism industry has come from the fact that "domestic tourism is now becoming recognised for its vital role in underpinning the social and economic fabric of many of the U.K.'s rural and urban communities" (British Resorts and Destinations Association, 2006).

The important contribution of domestic tourism can particularly be felt when a country is faced with a crisis that hinders the development of its international tourism industry. The United States (U.S.) faced a drop in its tourism industry in 2002 and 2003, after the September 11th attacks on the country. After 2003, numbers have since risen from 43.6 million and 41.2 million respectively, to 46.1 million international tourists in 2004 (Office of Travel & Tourism Industries [OTTI], 2005; Travel Industry Association of America [TIA], 2005; American Hotel and Lodging Association [AH&LA], 2005). Throughout the aftermath of the attacks, domestic tourism numbers maintained a steady growth rate as shown in Table 1.1 (TIA, 2005; TIA, 2005b) below:

Table 1.1 Total Domestic Person-Trips, United States, 2001-2004

	2001	2002	2003	2004
Total Domestic Trips (Millions)	1,123.1	1,127.0	1,140.0	1,163.9

Source: Travel Industry Association of America, 2005

Of the total US$ 600 billion received by the American tourism industry in 2004, US$ 525.3 billion was contributed by domestic tourists (TIA, 2005). While efforts to promote tourism in the U.S. as regards the international market maintain, local tourists continue to use their weekends and vacation time to travel throughout the country.

Much like tourism in the United Kingdom, Canada's domestic tourism industry is an extremely significant portion of its overall tourism industry. In 2002, domestic travel by Canadians represented 8 out of 10 of all overnight trips taken in the country per year. Over the past few years, the domestic tourism market has continued to represent a "very substantive share of [the] country's total tourism account" (Rogers, 2002, p.4). With a recent 6% decline in tourists from the U.S. and a 1.2% decline in spending by international tourists both during the third quarter of 2005 (Constantineau, 2006), Canada has begun to rely more heavily on its domestic tourism market. Within the third quarter of 2005, Canadian tourism spending rose by 2.5% to approximately $CAD 10.9 billion or US$ 9.56 billion while non-Canadian tourism revenues fell by 0.5% to around $CAD 4.5 billion or US$ 3.95 billion (Constantineau, 2006). This growth in domestic tourism spending is "continuing to drive the overall growth in tourism in Canada" (Statistics Canada, 2005). Statistics Canada (2005) views domestic expenditure as having been the sole source for growth in tourism in 2005, with domestic tourism's share of total tourism spending having reached 70.7% towards the end of 2005, up from 68.6% at the end of 2004. The steady growth of domestic tourism has clearly helped the country maintain strong growth through dips in its overall industry.

These three examples of strong domestic tourism markets are clearly enshrined within environments whereby travel and tourism is a valid option for a significant portion of the population. In developed nations, as in developing nations, tourism is promoted mainly to the international tourism market; tourists in developed nations, however, have the

means and the inclination to take advantage of the same tourist attractions aimed at the international market within their countries. This has proved advantageous for these nations in that the domestic tourism industry has sustained and maintained the growth of their respective industries over the years. Domestic tourism in developing nations needs to have the same effect. In developed nations, local populations are continuously showing an enthusiastic interest in touring their respective countries and do so far more often than those in developing countries. The economic impact made by domestic tourism in more developed countries, as shown above, is evidence that the contribution of this segment of the tourism industry can make a far more substantial impact than international tourism on a nation's economy.

Nevertheless, the role of domestic tourism globally remains secondary to international travel, as is evidenced by the limited writings on domestic tourism as a whole. In developed nations, a culture of tourism has been more deeply entrenched and the notion of travel at least once a year is feasible for many members of society. This is due to many obvious factors, such as a larger amount of disposable income available to those in developed nations; paid vacation time allowing for the opportunity to take short trips within the country; and, a culture of tourism having been developed over the years, creating both the inclination and opportunity for travel amongst the local population. By contrast, in developing nations, the culture of tourism and travel for leisure purposes is essentially non-existent, where local populations have instead developed a 'culture of survival'. The idea of travel is often considered a luxury that many people cannot afford. More recently, however, several factors are beginning to change this concept and the interest in developing domestic tourism in developing countries is growing.

In some developing countries, the improvement of socio-economic conditions of certain sections of the local population, the rise in workers' rights such as paid holidays, and expansions and improvements in the transport system have led to the growing phenomenon of domestic tourism. In addition, a rapid globalization process encouraging Western lifestyles and promoting the "Northern-style consumerism" and leisure travel (Ghimire, 2001, p.6) has encouraged many locals, including those in the Diaspora (through conferences, such as the *First Conference of Intellectuals of Africa and the Diaspora* held in October 2004 in Dakar, Senegal and more recently, *Second Rwanda Diaspora Global Convention* held in Kigali, Rwanda in December 2005), to begin

exploring their countries. While these factors contribute to the growth of domestic travel in such countries, it is still a very recent phenomenon that must be strongly promoted and developed.

Some benefits of domestic tourism to developing economies can be noted in the contribution to local economic development in particular. Domestic tourism is significant and growing in Asia, Africa and South America and because it often develops within important markets for the poor, it has a greater impact on local economies and local development (Ashley, Boyd and Goodwin, 2000, p.1). “Domestic tourists are particularly important clients for self-employed sellers and owners of small establishments”, and they tend to buy more from local vendors than do foreign tourists (Ashley, Boyd and Goodwin, 2000, p.1). The main motivations for domestic travel in developing countries include visiting friends and relatives (VFR), leisure travel, business, and religious pilgrimages (Opperman and Chon, 1997, p.82). Mass domestic tourism motivated by leisure purposes, however, “is a more recent phenomenon related mostly to economic growth and the consequent expansion of the urban middle classes” (Ghimire, 2001, p.8). Even as a more recent phenomenon, domestic tourism strictly for leisure purposes is still, as mentioned earlier, a rare occurrence in most developing countries.

In discussing the development of national tourism policies, the issue of a bigger role domestic and regional tourism can play in African economies arises. Gerosa (2003, p.40) states that domestic tourism is “often overseen”, despite case studies showing a greater impact particularly on the informal sector than international tourism. The advent of the new millennium has brought about changes in the direction of most tourism strategies around the world. Countries like China, Russia, India, Thailand, Nigeria, Kenya and South Africa have begun initiatives to improve their domestic tourism markets. After the late 1980s following the Tiananmen events, China’s national tourism market began to offer competitive prices and diversified activities to Chinese tourists, creating an industry more suited to the needs and interests of the national population. The rise in income in both urban and rural areas, the expansion of the middle class, as well as the influence of Western consumer lifestyle contributed to the success of the industry (Ghimire and Li, 2001, p.104). This change in policy proved effective as international overnight tourist arrivals to China in 2004 totalled 41.76 million, contributing US$ 25.73 billion while domestic tourism numbers in 2004 totalled 1.1 billion with a total

of US$ 58.3 billion in receipts (China National Tourist Office, 2005; Dominican Today, 2005) giving China the largest domestic tourism industry in the world (Dominican Today, 2005).

International tourism numbers have fallen in Russia since the 1980s (Albrighton, 2000). However, Russia has more recently been considered an emerging market for tourism and now more Russian citizens are being encouraged to holiday at home in order to maintain the struggling industry (Leisure Tourism, 2004). When drops in international tourist numbers occur, therefore, as was the case in Russia, a shift in focus towards domestic tourists becomes necessary for the sake of sustaining the country's tourism industry.

In India, the notion of travelling for leisure had been for years, considered too much of a luxury for the majority of the population, and therefore the focus was often in attracting foreign visitors who brought in U.S. dollars (BBC News, 2001). "Domestic tourism was ignored because it competed for facilities and services with international tourists and these were in short supply" (Rao and Suresh, 2001, p.208). Now it is politically and economically sensible to focus on domestic tourism and "the marketing and organization of domestic tourism services have become very recently part of the function of the travel trade in India" (Rao and Suresh, 2001, p.208). The private sector, for example, has emerged as a strong supporter of the domestic tourism industry by offering packages and deals for local residents to specific resorts. In 2000, India received 2.5 million international tourists, while domestic tourist numbers reached 135 million (Roe, Ashley, Page and Meyer, 2004, p.10).

Thailand's domestic tourism industry has been positioned as a key economic driver. With the rapid growth experienced by the economy over the past ten years, an expansion of the country's middle-class has resulted in a rise in domestic tourism. The World Tourism Organisation (WTO) recorded 9.1 million international tourists to Thailand and 55.1 million domestic tourists in 2000 (Roe, Ashley, Page and Meyer, 2004, p.10). More people are finding the time and the financial resources to travel and will soon make up a greater share of tourism-related expenditures than foreign tourists to the kingdom (Kaosa-ard, Bezic and White, 2001, p.109-110).

In Africa, domestic tourism initiatives have been slower in terms of growth. Countries like South Africa, Nigeria and Kenya are also seeking to improve domestic tourism. South Africa's "Sho't Left" campaign, derived from everyday taxi language, is a method of making tourism accessible to the greater population (Rogerson and Lisa, 2005). The campaign focuses more particularly on South Africa's black population, previously excluded from any leisure tourism activities during the country's apartheid years. Since "Black South Africans were not permitted to be accommodated in the same hotels as whites or even visit the same beaches as whites, domestic tourism under apartheid geared itself to serve the interests of the privileged white minority population" (Rogerson and Lisa, 2005). This new campaign to encourage black South Africans to enjoy and participate in South Africa's tourism industry has been described as "the sustainable future of tourism in South Africa", aiming to create a tourism culture within a previously marginalised population (Rogerson and Lisa, 2004, p.14). The benefits for domestic tourism as cited by the Minister of Environment and Tourism, Marthinus Van Schalkwyk, include the fact that tourism is about creating jobs and bringing more income for communities. It is also, however, about long-term tourism success (Schalkwyk, 2004).

Statistics for domestic tourism numbers in the following countries are very limited and at times inconsistent. Nigeria, with the largest population in Africa and "one of the largest pools of educated middle-class professionals in sub-Saharan Africa" (Mustapha, 2001, p.172), has enormous potential for a strong domestic tourism sector. Though the majority of Nigeria's middle-class "has been crippled by economic adversity", the notion of creating a tourism industry that is designed to cater to the local population can make a great difference in Nigeria's tourism industry (Mustapha, 2001, p., p.187). Babatunde (2004) discusses President Obasanjo of Nigeria's speech in December 2004 at the 4th *Presidential Council on Tourism*, which argued that the improvement of domestic tourism will not only help to accelerate the development of Nigeria's tourism industry, but will also help the country save a lot of foreign exchange. He stated: "it is only when we have a vibrant tourism activities [*sic*] within the country that we will encourage others to come and enjoy what we are enjoying" (Babatunde, 2004).

In Kenya, the Kenya Tourism Board plans to use Ksh50 million (around US$ 690 000) mainly in marketing and promoting of domestic tourism in the country. The aim of this venture is "to sensitise and create awareness among communities on the benefits of

domestic tourism and also diversify their tourism products for more gain" (Kenya News Agency, 2004). Several domestic tourism fairs held at Nairobi, Mombassa, Eldoret and Kisumu, have been developed in order to "encourage Kenyans to explore their country for themselves, and to consider travelling in Kenya before jetting off on an overseas holiday" (Magical Kenya, 2003). The importance of domestic tourism in Kenya has not been overlooked as was indicated in a speech by the Permanent Secretary of the Ministry of Tourism and Wildlife (Nabutola, 2005) where she stated that, "domestic tourism forms the basis for a stronger international tourism. It bridges the seasonality gap and therefore creates jobs and stability in the employment sector. This ties in appropriately with the government goals of poverty reduction and wealth creation hence leading to social harmony". Ensuring the long-term sustainability of the tourism industry, particularly in developing countries, is therefore critical.

Judging from the above discussion, clearly the domestic tourism industry is indeed a growing phenomenon. The impact of this sector can be great if developing countries like Rwanda, for example, take full advantage of it. Rwanda is ranked among the poorest countries in the world. The country's tourism industry faced a devastating slump between 1990 and 1994 during civil strife that escalated into war and culminated in genocide, leaving the country in a state of stagnation physically, economically and socially. Currently, as Rwanda completes its transition to stability and global market entry, there has been a determined effort to rebuild what was lost, and this has also led to the development of the national tourism industry. Ever since 2001, the country has made a renewed commitment to tourism development as the industry is considered a significant driver in economic development, job creation and economic stability. Figure 1.2:

Figure 1.2: Location of Rwanda



Source: Wendy Job, Cartography Department, University of the Witwatersrand, 2006

As is the case with many African countries, Rwanda's present tourism strategy, while specifying that domestic tourism is a critical part of tourism development, has directed most of its efforts on the development of international tourism. The country's current tourism initiatives attract specific international tourists, particularly eco-tourists who are drawn to the country's natural attractions, especially the world-famous mountain gorillas. Marketing plans geared towards this market have resulted in considerable growth in the country's third most significant contributor to the national economy. While such growth is considerable, Rwanda's domestic tourism potential has been set aside in order to restore the industry as quickly and effectively as possible. This has meant a more direct focus on international tourists who generate foreign exchange earnings and increase the potential for more tourists from critical tourist-generating countries.

While the role of domestic tourists has been addressed in the latest material used to develop Rwanda's *National Tourism Strategy*, the initiatives set forward have had minimal effects. This research report will therefore address the issue of an increased focus on domestic tourism promotion in Rwanda and highlight the potential impacts from

such a focus. The rationale for the study supports a strong motivation for a more dedicated approach by Rwanda's tourism stakeholders, to develop the country's domestic tourism market alongside the international market.

1.3 Research Aims and Objectives

This study seeks to examine the potential impact on Rwanda's overall tourism economy of an increase in domestic tourism, as well as subsequent social benefits associated with the participation of the local population in the tourism industry. The objectives of this study include the following:

- To identify the role of domestic tourism globally, highlighting the impact of growing domestic tourism numbers *on the economies* of both developed and developing nations;
- To determine the current role of international and domestic tourism in Rwanda, and,
- To investigate the possible impact of a more focused domestic tourism market in the country. Part of this investigation will involve recording opinions of Rwanda's tourism stakeholders on domestic tourism, and identifying the potential for the development of this market.

1.4 Structure of the Research Report

The report is composed of five sections: Chapter 1, the introductory chapter, will give an overview of the tourism industry in general, and domestic tourism in particular, and its place in the world economy. Chapter 2 will cover the literature review, and provide an overall view of tourism in Africa and its relevance to growing economies of developing countries. Chapter 3 will concentrate on the history of the tourism industry in Rwanda, with a look at international tourism in general, and the mountain gorilla in particular, as the main area of concentration. Chapter 4 will examine the place of domestic tourism in Rwanda's overall economy as a case study for developing countries, particularly in

Africa. The final chapter will form the conclusion and give recommendations as to the next steps needed to help transform Rwanda's domestic tourism industry.

Chapter 2
Africa's Tourism Industry

2.1 Introduction

The aim of this chapter is to focus on the tourism industry on the African continent. On a global scale, Africa's tourism growth rate is expected to continue to gain strength; with the tourism industry playing a strong role on the economies of several African nations, it is critical to outline the benefits and hindrances that are specific to the continent and are a part of this growing industry. Section 2.2 outlines the role of tourism in African economies and the impact the sector has had on much-needed employment and economic stability. Section 2.3 focuses on current tourism initiatives on the continent from countries that have developed successful tourism industries over the years, to those that have struggled with conflict and instability that has hindered the stability of their tourism industries. This section focuses on benefits and constraints to the development of tourism on the continent. The main hindrances to the development of tourism, those that prevent tourism industries from thriving on the continent, will also be addressed. Section 2.4 discusses the role of tourism as one of the few remaining policy options left for African countries and the potential benefits of proper policy development. Section 2.5 concludes with an overview of the development of tourism in Africa including the major hindrances countries on the continent must overcome. This review leads to the introduction of Rwanda as such a country, overcoming significant hindrances to tourism development in order to create a significant industry, as will be discussed further in Chapter 3.

2.2 The Role of Tourism in African Economies

As already noted, tourism can provide a substantial contribution to a country's overall economy, aiding in poverty alleviation and a more sustainable and diverse economic outlook. As Liu and Wall affirm, tourism is often "used as a tool to stimulate marginal economies and to promote development through the jobs and incomes that it can foster" (Liu and Wall, 2004, p.1). Such factors are critically important to developing countries in

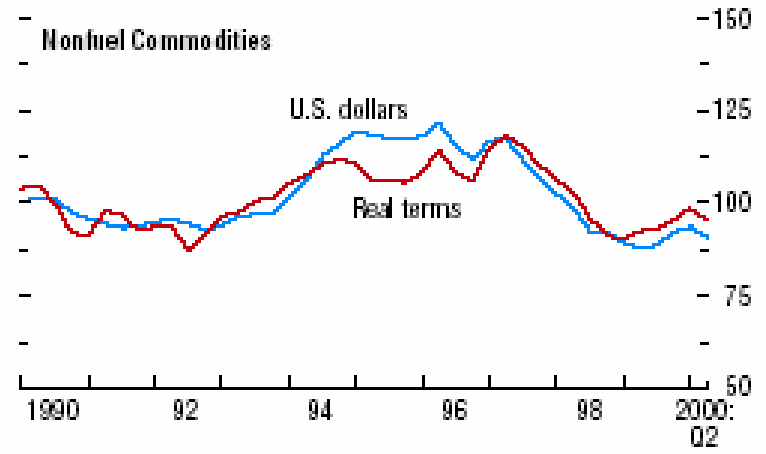
general and African countries in particular. According to a 1999 report by the Department for International Development (DFID), 80% of the world's poor (living below US$1 a day) live in twelve countries, eleven of which have tourism as a significant and/or growing sector. In the 100 poorest countries of the world, tourism is considered to be significant, often accounting for over 2% of GDP or 5% of exports. This is the case for almost half of the low-income countries and almost all the lower-middle income countries in the world (Goodwin, 2000, p.13; World Bank Group, 2005). As previously mentioned, tourism is significant in about one hundred of the world's poorest countries, therefore significant for a large number of African countries, which make up over half of the United Nations' world's 50 poorest countries. The New Partnership for Africa's Development (NEPAD) developed a Tourism Action Plan at the 3rd General Assembly of the African Union in July 2004, emphasizing the bigger role tourism will play on the continent. The plan sees in tourism incredible potential to contribute to the "economic regeneration of the continent" (NEPAD, 2004, p.3) and indeed, the industry has grown into one of the major economic activities on the continent.

Often falling behind the agricultural sector as the lead sector in most African countries' economies, tourism still has the potential to add diversity to many of these economies, a fact many countries are now recognizing. Throughout Africa, Simpson (2001, p.1) asserts that tourism keeps re-emerging as a potential growth area. Ashley, Boyd and Goodwin (2000, p.1) suggest that tourism has the opportunity to diversify local economies particularly in areas with few other export and diversification options, under which most African countries fall. In addition, "tourism represents an important transfer of resources from predominantly affluent source countries to Africa" (Mitchell and Ashley, 2006, p.3). Africa is said to have shown the strongest growth rate for tourist numbers internationally and, as Christie and Crompton (2001, p.3) state, with the "expected dynamic growth of the sector worldwide, sub-Saharan African countries can realistically expect to increase their share of the market". The WTTC specify that jobs in tourism in sub-Saharan Africa will account for nearly 7.5% of total employment on the continent, and that the industry would account for over 11% of the sub-Saharan African region's GDP with a growth rate of over 5% in real terms (2% higher than the forecasted growth rate for the world), all over the next decade (Christie and Crompton, 2001, p.1). These are all positive indications that the tourism industry has the potential to thrive on the

continent, and the current economic situation in Africa calls for governments to look towards tourism as a viable sector.

There are several factors that have slowed down the positive impact of tourism on countries in Africa, most particularly the fact that African economies currently tend to be heavily reliant on export commodities. Subsistence agriculture is a significant part of life within the less developed world with nearly 60% of the workforce employed in agriculture compared with just 5% in more developed nations (Sharpley, 2002, p.28). As Simpson states, "African economies that have been founded on the exportation of raw commodities such as cocoa and coffee, minerals and ores, are having to look for new sources of revenue" (Simpson, 2001, p.1). Traditionally reliant on commodities, the prices for these goods have been low and continue to fall on the world market. See Figure 2.1 below:

Figure 2.1: Prices of Non-Fuel Commodities 2000



Source: IMF, Current Issues in the World Economy, Chapter II, 2000

Very few economies in Africa are "sufficiently diversified to absorb the fall in value of such goods". While tourist arrivals in Africa have consistently bypassed the world average, as mentioned above, commodity prices have steadily dropped (Simpson, 2001, p.1).

Malik Fal, Africa Director of OTF Group consultants, a competitiveness consulting firm that advises developing companies, regions and nations to create competitive

advantage, noted how currently, most African countries' and companies' exports are based mainly on basic commodities. On any scale, he stresses, "countries that export [only] basic commodities stay poor" (Lagace, 2005, p.1). Further, it is stated that "when one looks at the trends in prices for commodities, whatever the timeline is…commodity prices have been going down" (Lagace, 2005, p.1). Ankomah and Crompton (1990, p.13) underscore this point by stating that "over-dependence on limited primary commodities has subjected…nations' economies to damaging fluctuations in the unstable world primary export commodity market." Many African countries have had to face this reality, and as a means to rectify the situation, have turned towards diversification in their economies.

The benefits of tourism as a means to bring growth and stability to countries' economies are a strong motivating factor. Dieke (2000, p.4) states that, the option to choose tourism as a policy "may stem from several considerations, not least being a lack of viable alternative development possibilities open to a country". Brown (1998, pp.1-2) strongly echoes Dieke's point, stating that "for African governments, the struggle for economic growth and independence is a central and pervasive issue. To the citizens of these societies, economic justice is a necessity for survival. Thus the enthusiastic embrace of tourism by poor nations is not surprising, through the lure of quick growth in foreign exchange earnings to governments, and to the people, new forms of development." Jenkins (2000, p.125) points out that as a "service-intensive" industry, tourism is often regarded as an effective option in terms of economic diversification and job creation. Employment and job creation has become a serious concern for several countries, and in many developing nations with high rates of increase in population, the availability of jobs for a young workforce is often a major problem.

In Africa, unemployment is one of the most serious problems facing the continent. Unemployment among women and youth continues to be particularly prevalent, despite economic growth in the continent. According to the United Nations, "Africa's real GDP is estimated to have grown by 5.1% in 2005, roughly the same rate that was achieved in 2004…the relatively high rates of growth recorded over the last five years confirm the continued recovery of African economies" (Africa Focus, 2006). As African economies begin to stabilise and foreign direct investment in the continent shows signs of growth from $18 billion in both 2003 and 2004, to an estimated $30 billion in 2005 (United

Nations, 2006), the future looks promising. However, as highlighted by the United Nations, this growth has had “little spill-over effects on employment creation and on the rest of the economy” (Africa Focus, 2006). There are several persistent factors that contribute to the continuously high rates of unemployment despite economic growth in these same countries:

- While increased education is encouraged through government policies resulting in larger numbers of university students, “there is often inadequate planning for future employment of graduates”;

- Technological advances have led to a drastic reduction in labour-intensive work, such as agricultural employment as fewer people are needed for certain jobs;

- As the population on the continent increases and as urban migration increases, with large numbers of people from rural areas in search of employment in urban centres, more job seekers are thrust into the job market;

- Structural adjustment programs on the continent have also left people working harder and longer for lower wages, while others are laid off in large numbers (Alli, 1995).

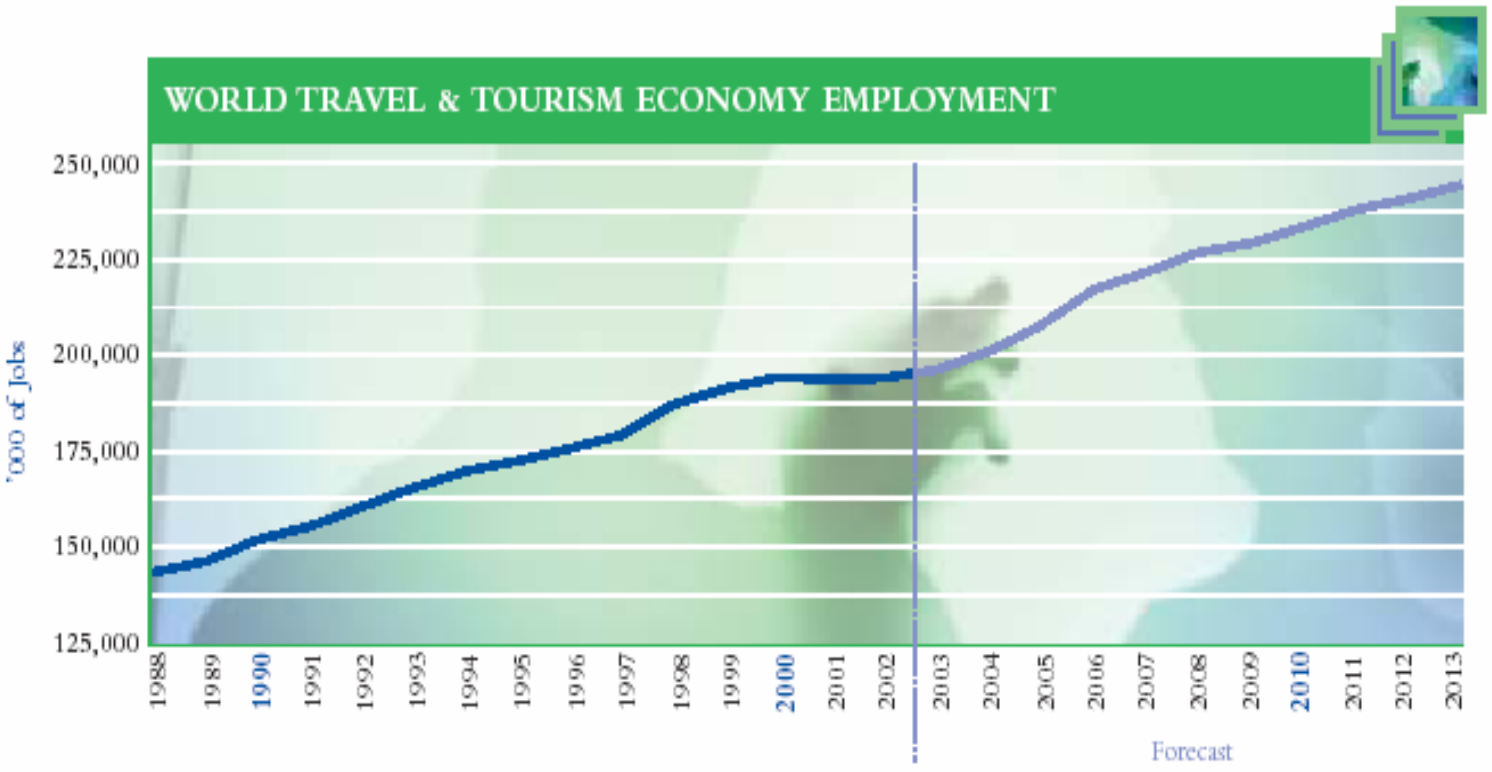
Unemployment and poverty has evidently “been unresponsive to economic growth” with the majority of Africans being employed in the agricultural industry which often provides seasonal employment and rarely leads to income security (Africa Focus, 2006). Augustin Fosu, the Director of the Economic Commission for Africa’s Economic and Social Policy Division states that, "as long as people are kept from participating in the economy as productive agents, people will continue to benefit only sparsely [from] whatever growth is actually achieved" and that “sustained growth is precisely what is necessary in order to increase employment and reduce poverty” (Africa Focus, 2006).

In Namibia, for example, with a small population base, a marginal agricultural sector and limited opportunities within the manufacturing sector, tourism has a “comparative advantage to create jobs particularly in the rural areas where most tourism activity takes place” (Jenkins, 2000, p.125). Tourism as a policy has often been selected by many

developing countries due to the fact that it is a very labour intensive industry, at times considered more so than manufacturing; and employs a large number of women and low-skilled workers. Such conditions are important for many developing countries lacking such opportunities for more disadvantaged members of their populations. Tourism can promote independence and economic relief for many men and women who see the industry as "representing another set of opportunities, however limited, in a social world where options are few" (Harrison, 1995, p.25). Tourism not only creates jobs, but according to Christie and Crompton (2001, p.15), it also creates "good jobs" with better physical working conditions and healthier working environments than many other economic activities such as mining, logging and manufacturing.

The tourism industry represents options that many people in host countries do not often encounter. Whether in the formal or informal tourism sectors, job opportunities increase significantly with growth in the tourism industry. See Figure 2.2 below:

Figure 2.2: World Tourism (Direct) Employment and Potential Employment, 1988-2013



Source: World Travel and Tourism Council, *Blueprint for New Tourism*, 2003

Across Africa, according to Simpson (2001) “tourism is being targeted as a potentially lucrative foreign-exchange earner and means of attracting foreign investment”. In developing countries, women are often most involved in the informal sector often selling goods or crafts to tourists. Being low-skilled workers, the domestic-type jobs as well as the service nature of the industry, allowing for the opportunity to sell goods that are easily accessible or easily created, opens a new world of possibility for previously unemployed women on the continent. Overall, based on all the potential benefits tourism can bring to African countries, among many others, it is evident that tourism can play a significant role in assisting Africa, and mainly sub-Saharan Africa, to attain its target growth rates (Christie and Crompton, 2001, p.1).

African tourism, based on its natural and cultural assets, offers a diversity and authenticity not found anywhere else in the world: “Ancient cultures, unique natural parks, unspoiled beaches, and the fascination that the African continent still exerts on the imagination of tourists, are the elements on which the competitive advantage of African tourism is based” (Gerosa, 2003, p. 5). It is with this purpose in mind that NEPAD, through the *Tourism Action Plan*, emphasises that focused actions need to be taken in order to develop dynamic tourism sectors throughout the continent. Forging partnerships to maximize benefits; providing Africans with opportunities to participate in, and benefit from tourism; and paying attention to issues of safety and security are some of these actions that will lead to a more beneficial tourism industry for Africa (NEPAD, 2004, p.3).

2.3 The Current Situation of Tourism in Africa

In Africa there are a wide variety of tourism experiences ranging from “safari tourism, beach tourism, ‘roots’ tourism, marine tourism and cultural and heritage or ethnic tourism” (Dieke, 2000, p.3). The tourism industry is not new to some African countries, as they have been involved in the sector since political independence. Several countries have considerable tourism potential while countries including Kenya, Mauritius, Morocco, South Africa and Senegal are well-established, successful tourism destinations:

- Kenya: World famous for its safaris, continues to attract large flows of international tourists every year. Thousands of tourists intrigued by adventure tourism and discovering "the cradle of humanity" continue to flock to this East African destination evidenced by a growth of 26% in 2005. Increased demand for tourism to the country has resulted in an increase in international flights to the country, with internationally renowned tour operators recently restarting weekly charter flights (World Travel Market, 2006);

- Mauritius: Predominantly a holiday destination made famous by its numerous beach-resorts, the country's sub-tropical climate and hospitable population attracted over 750,000 tourists to the country in 2005 (Mauritius Chamber of Commerce and Industry, 2006). The tourism industry in Mauritius is extremely significant for the national economy. As the third most important economic sector, the industry has contributed considerably to the development of the country. Over the past 20 years, "tourist arrivals increased at an average annual rate of 9% with a corresponding increase of about 21% in tourism receipts". In 2000, tourism receipts equalling US$508.3 million contributed about 11% of the country's GDP (Republic of Mauritius, 2005).

- Morocco**:** Viewed as a mythical and exotic destination, Morocco is an extremely popular destination, particularly due to its proximity to Europe. Morocco continues to attract tourists to its Imperial cities with much of the country's history and culture being its main attractions. Tourism in North Africa has continued to grow, although at a slower pace than sub-Saharan Africa. Tunisia and Morocco lead the growth in the region and recent promotional campaigns abroad and the generation of tourism infrastructure within the country led to an increase of 5% in the country's tourism industry (ANSAMed, 2006).

- South Africa: A significant player in African tourism, South Africa is a diverse nation, attracting tourists from all over the world. The country's historical, cultural, and natural attractions ensure enjoyable attractions for any tourist. Recently, the country has identified two key market segments, (the adventurous 'Wanderlusters' and the NSSAs [Next Stop South Africa], keen on sampling the country's wines, natural beauty and sightseeing opportunities) as part of the

country's aim to increase visitor spending and duration of stay (World Travel Market, 2006);

- Senegal: The country's beach resorts along with its natural habitats provide several diverse options for any tourist. A significant growth of 6.7% in 1996-2000 reflected the country's popularity with its main tourism market in Europe. European tourists are most attracted to the country due to its proximity and warm climate (Crompton and Christie, 2003, p.ii). With "over 700Km of beautiful beaches, with high palms and rainforests, dry deserts and over 100 varieties of tropical plants and flowers" in addition to several historical museums, natural parks and reserves (Senegal Tourist Office, 2004) Senegal is a prime destination for many travellers.

Other countries like Rwanda and Ethiopia, however, have faced a depletion of their tourism industries due mainly to conflict and/or economic strife. These countries therefore have to develop and create new experiences, adequate tourism infrastructure, and marketing initiatives in order to refurbish their respective tourism sectors. Tourism is considered to be an economically sound industry internationally. This could serve as a benefit for many African nations as Africa's main economic sectors, including agriculture and mining, "have suffered adverse shocks in the past" due to internal and external factors such as environmental degradation and lack of access to markets (Gerosa, 2003, p.6). While the tourism industry is vulnerable to certain factors as well, it often serves to mitigate such shocks to the economy.

2.3.1 Tourism in Africa: Benefits

Several economic benefits of tourism have already been mentioned, and remain potentially the most significant benefits offered by the industry. These include:

- Economic stability and diversity;
- Job creation; and
- Economic and social benefits for disadvantaged members of society in developing countries (less-skilled workers, women, etc.)

The capacity of the industry to benefit a variety of sectors, previously neglected environments and several social groups is what makes it an intriguing option for many countries, particularly developing countries. The tourism industry creates links with construction industries, transportation sectors, agricultural sectors, and cultural and historical institutions. Such far-reaching connections create more prospects for sustainable development in an overall economy. The *Tourism Action Plan* document states that in addition to the sector having the potential to catalyze growth in other economic areas such as horticulture, agriculture and the service sector, "more importantly, the tourism sector has a huge potential to contribute to the achievement of the Millennium Development Goals, and ultimately eradicate poverty" (NEPAD, 2004, p.3). The document stresses that for Africa in particular, if these economic benefits are realised, they can be used to "overcome resource problems, increase the region's economic well-being, and improve the opportunity and quality of life of its inhabitants" otherwise the continent will continue to "depend on international aid to support development efforts" (NEPAD, 2004, p.5). Tourism has the ability to flourish in previously neglected regions that may have been considered "unattractive" or "hostile" environments. Often "the gains of tourism are ploughed back into the development of areas where they are generated" (Ankomah and Crompton, 1990, p.14). The ability of the industry to develop in poorer areas that lack other export and diversification options (Ashley, Boyd and Goodwin, 2000, p.1-2) has been a significant benefit for many countries. Revenues from wildlife tourism in many countries are used to support the running of national parks and game reserves as well as to support the development of the surrounding communities. As Ankomah and Crompton argue, "tourism can also validate traditional culture and help local people see some value in preserving and restoring historical artefacts and cultural traditions" (Ankomah and Crompton, 1990, p.15), bringing a sense of pride to the people of the host nation.

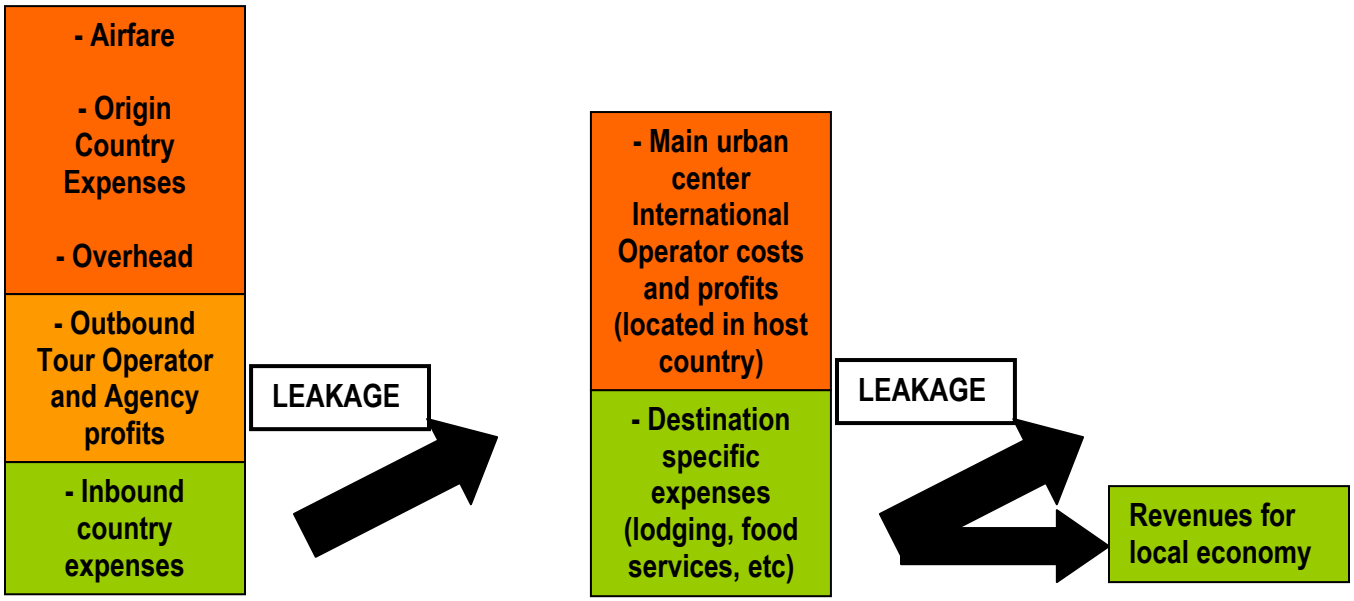
Overall, part of tourism's potential to become and remain a dynamic sector will be its ability to provide Africans with opportunities to participate in, and benefit from, the sector. While tourism is a valuable asset for the continent, the industry is widely acknowledged as being potentially volatile. Tourism, however, is easily susceptible to changes in economic, political or social environments (including changes in trends) and, as a result, the potential threats of tourism must be considered.

2.3.2 Tourism in Africa: Constraints and Hindrances

There are several negative aspects affecting tourism in developing countries in general. The benefits of employment were outlined above, but some negative aspects to employment in tourism do exist. Employment is a major aspect of the impact tourism has on countries, particularly in the developing world. The “seasonal character” of the industry presents a danger to direct employment and creates general economic problems in the form of “job [and therefore income] insecurity, usually with no guarantee of employment from one season to the next; difficulties in getting training; employment-related medical benefits and recognition of their experience; and unsatisfactory housing and working conditions” (UNEP, 2001). Nevertheless, while these dangers are very real, employment opportunities offered by the tourism industry can and have been very beneficial.

Another constraint to tourism is that of “leakage”. Leakage in the tourism industry is caused when a significant amount of money generated from a country’s tourism industry does not remain within the country. Taxes, profits and wages that are paid outside the host country and imports that are purchased in order to sustain the country’s tourism industry are called “leakage”. See Figure 2.3 below:

Figure 2.3: Two Potential Forms of "Leakage" in the Tourism Industry



Source: UNEP, 2001

Leakage acts to reduce the total economic impact within the country with only a small proportion of the extra income being re-spent locally (Brown, 1998, p.238). Most often, all-inclusive packages are the largest source of leakage in a country. It is estimated that 80% of travellers' expenditures go to airlines, hotels and other international companies, not to local businesses or workers (UNEP, 2001). From each US$100 spent on a tour by a tourist from a developed country, only US$5 actually stays in the developing host country's economy (UNEP, 2001). A need to acknowledge the larger population, therefore, when creating and implementing tourism policies in many developing countries is necessary (Christie and Crompton, 2001, p.15; UNEP, 2001). The issue of leakage may not be totally avoidable in developing countries' tourism development, but it is important to note that the policies and practices of multi-national corporations' ownership and management of tourism initiatives often contributes to exacerbate the problem. The use of local input and personnel therefore becomes critical (Brown, 1998, p.240). The criticisms of the industry listed above are widely acknowledged and can have severe consequences if they are not addressed. Pressing issues in the development of tourism are often considered to be threats to tourism industries in developing countries in particular: These include the dependency of developing countries on economic conditions in external markets; the potential exploitation of

natural and cultural resources; the dependency on tour operators who can shift their interests between different resorts or countries in response to changes in costs or trend; and, the fact that mass tourism is highly seasonal, having the effect of reducing holiday enjoyment because of overcrowding or under-utilization of fixed capital hotels (Shaw and Williams, 1994, p.183-184).

Dependency on external factors and influencers can have great consequences for a developing nation. Current global political and social problems have not meant that the tourism industry has come to a stand-still; however, African host countries must be aware that continuing threats to larger economies can mean dips in their tourism industries every now and then. Before the tragic events of September 11th, world tourism was set for an increase of 3-4% in 2001. After the attacks, in 2002 the WTO estimated that year-end results would show a growth of just 1% of tourist arrivals as worldwide travel reservations dropped by 15% at the end of October 2001 (Neto, 2002, p.3). The war in Afghanistan and a global economy that was weakening even before the attacks also contributed significantly to the drop in world travel. The situation was grim for the tourism industry and, according to the WTO, industry revenue dropped from US$475 billion in 2000 to US$463 billion in 2001 due to the attacks (Neto, 2002, p.3). While the initial reaction from tourists after this international tragedy was to remain at home, the secretary-general of the WTO stated that “hundreds of millions of people still traveled overseas in 2001 [and] made shorter journeys closer to home” (Tourism Queensland, 2001). The WTO expected the industry to make a comeback as the global economy was anticipated to improve by the second half of 2002. Indeed, tourism numbers did bounce back from revenues of US$463 billion in 2001, as mentioned above, to US$474 billion in 2002, nearly reaching revenues of pre-September 11 tourism (Vantage Communications, 2000, p.4). In December 2004, a Tsunami in the Indian Ocean devastated many coastal nations, and greatly impacted three economies in particular: Maldives, Sri Lanka and Thailand. These countries, all heavily reliant on tourism, faced significant declines in tourist numbers. The WTTC found that the total impact of the Tsunami on travel and tourism numbers in 2005 would cost around US$3 billion, and more than one quarter million jobs (WTTC, 2005b, p.2). While the impact was great, the WTTC (2005b, p.2) underscores that this impact is expected to be limited to specific destinations. While the industry continues to bounce back after seemingly impossible circumstances, it is nevertheless affected.

Developing more stable industries through the strengthening of domestic and regional tourism efforts, for example, can help mitigate some of these problems. Domestic and regional tourism can often maintain a country's tourism industry during otherwise harmful times. As Neto (2002, p.3) notes, after the September 2001 terrorist attacks in the United States, it was travel within the same country or region that weathered the worst effects of the crisis and at times, benefited from it. As regards the potential exploitation of natural and cultural resources, since African countries tend to focus their tourism products on their natural and cultural assets, policies need to be put in place to protect these assets and ensure sustainable development efforts. The pressure put upon a country's natural resources, which are often the major attractions for many countries, makes tourism industries extremely vulnerable. Several sources (Brown, 1998; Shaw and Williams, 1994; Neto, 2002) stress the importance of protecting natural resources. At times, intensive tourism development can threaten natural landscapes causing deforestation, loss of wetlands and soil erosion (Neto, 2002, p.7).

Cultural tourism often means developing tourist experiences and products within local communities, but countries have to be aware of its potential to have negative effects on the community itself and the surrounding environment, such as over-exploitation of both natural and cultural assets. As Brown (1998, p.8) asserts, "Tourism should play the role of preserving these attractions." While tourism offers one of the few legal avenues by which those living in rural communities can derive economic benefits from wildlife and natural attractions, most rural entrepreneurs and community organisations who are interested in the tourist market "possess neither the skills nor the know-how to operate successful tourism establishments" (Victurine, 2000, p.1). Communities can be exploited and often lose out on land and former areas in which they grazed animals or grew crops either for consumption or as a means to earn an income. Often tourism offers minimal links with local economies and those that exist are often weak, with the possible exception of employment (Ashley, Boyd and Goodwin, 2000, p.1). At times tourism development not only leads to economic difficulties for those living in these communities, but, as Harrison (1995, p.24) states, it can also lead to an increase in social inequality and other unacceptable consequences if not approached in a positive, constructive manner at an early stage.

The volatility of the tourism industry is a major factor. Poirier states that "tourism operates as an 'elastic' commodity that can shrink rapidly under political pressures and economic constraints often outside of the government's control" (Poirier, 2000, p.31). The industry can be affected by events overseas in the source country, like a recession or the fluctuating prices of oil, or terrorist threats that have been occurring more recently. Threats in the host or receiving country, including political instability in developing nations, for example, bring pressure on the political authorities to maintain domestic stability (Poirier, 2000, p.31). For some, these threats are considered to be a strong warning against incorporating tourism into the economies of some developing countries. However, as mentioned above, while the tourism industry is affected by many external influences "fluctuations in demand for tourism are less severe than for the commodity exports on which many developing countries depend" (Christie and Crompton, 2001, p.15). While tourism is less volatile than many other industries in Africa, significant development in the industry, particularly in the domestic sector, still has not transpired.

While visitor numbers and opportunities from tourism are increasing on the continent, the proper growth and development of the industry has not reached its full potential. There are some negative effects within the tourism industry that are specific to African countries, which if not resolved, can pose a bigger threat in the long-run. These include:

- Standards of excellence that must be introduced;
- Management and administration of the sector that must be improved;
- The implementation of policies that must be the primary focus of governments;
- Public health and personal safety in tourist areas that must be improved if the sector is to develop;
- Human resource development and capacity building that must be addressed, and environmental mitigation and protection that must be improved by governments (Christie and Crompton, 2001, p.23).

In addition to these, Ankomah and Crompton (1990, p.11) outline what they feel are the five biggest and most pressing hindrances to the development of tourism in Africa:

- A negative image;
- The lack of foreign exchange to procure resources for tourism development;
- The lack of skilled manpower;
- Weak institutional frameworks for tourism planning; and
- Political instability

The negative image of Africa still persists today because most exposure to the region tends to convey negative information. This comes from the fact that most news media feature only the bad news from the region. The effects of such negative images on tourism development can be damaging for many countries. The largest problem comes from the fact that developing countries have insufficient resources available to counter these negative images abroad. Developing stronger relations with the media and the improvement of hospitality facilities could be the means needed to reverse the trend (WTO CAF, 2003). A good image is at times a destination's most valuable asset. The second issue is that of a lack of foreign exchange essential for the survival of the industry. Falling revenues from exports over the years has meant that "there is a lack of funds for the import of equipment, spare parts and other resources critical for development of the tourism industry" (Ankomah and Crompton, 1990, p.11). The third issue regarding a lack of skilled manpower addresses the fact that there is a severe shortage of people with sufficient management and technical skills necessary to organise and sustain industries. This often means that foreigners are brought in to provide expertise or to replace local workers altogether. Developing countries thereby increase rather than decrease their dependency on more developed countries. The lack of skilled tourism professionals in both the public and private sectors has led to capacity building becoming a priority in the tourism development strategies of most developing countries (WTO CAF, 2003). Weak institutional frameworks hinder the growth of the industry, or create unstable tourism industries. The private sector needs to be strong to

avoid the implementation of diverse policies from different organisations and institutions with divergent objectives (Ankomah and Crompton, 1990, p.18). Finally, political instability in a region not only maintains the negative image of a country and an entire region, but also leads to an unpredictable environment for tourists and potential investors. Certain regions plagued with instability will continuously have problems repairing their industries, yet policies need to be set in place for such a circumstance. Despite these hindrances, tourism's ability to contribute to economic growth and resolve critical and persistent unemployment issues has rendered it a significant contributor to the development of many African countries and has thus become one of the major policy options being developed by African governments.

2.4 Tourism as a Policy Option

More often than not, African economies tend to lack economic diversification. This could lead to economic stagnation and threaten a country's stability if it is over-dependent on one economic sector in particular. A shift towards a focus on the service sector has become increasingly necessary. This shift towards a service-led economy often includes more of a focus on tourism policy development. The benefits of participating in tourism and maintaining a strong tourism industry are evident to many policy makers. The *Tourism Action Plan* stresses that there are many potential benefits for the region, "including improved welfare and equity, the empowerment of local people, and improved resource conservation by local people" (NEPAD, 2004, p.6).

While many countries consciously select and implement tourism policies as a route towards economic development vs. other policies, it "appears to be one of few real policy choices left open to African decision-makers" (Poirier, 2000, p.31). Creating diversification in a country's main economic industries, particularly in developing countries, often results in a more sustainable economy. As Brown (1998, p.9) indicates, "Tourism in Africa should be planned on an integrated basis, with other sectors, taking account of socioeconomic and political objectives and constraints." Creating a sound tourism policy enables a country to have an articulate framework with which to work towards the development of the sector. Tourism policies, therefore, have to be implemented wisely in order to benefit the majority of the population. When developing a

strategy for the industry, it is critical to keep in mind which individuals are being affected and what policies can be initiated to ensure the least damage to the natural environment and social structure of the society. Tourism policies should reflect pending constraints and hindrances in order to produce a more sustainable and efficient tourism industry. Brown voices this issue specifically, stating that:

> Planning for alternative tourism projects in particular areas should be integrated with the planning of additional local services, including infrastructure, housing, education, health for the local population. Furthermore, host populations should be actively consulted and involved in tourism plans for their areas and have a voice in determining the extent and nature of development" (Brown, 1998, p.9).

Involving the local population in tourism development initiatives is not only important as regards protection of tourism assets, but also because members of the local population can significantly contribute to tourism development. Developing domestic tourism initiatives can help the local population to understand the importance of preserving natural resources and developing cultural and historical sites as well as encourage them to contribute to a growing and relevant industry for their nation's economy. Policy initiatives should include the importance of domestic and regional tourism, creating a more sustainable industry. Over the years, due to several reasons including exile, educational and professional opportunities, and the recently identified "brain drain" of the continent, many Africans are living in the Diaspora. Members of the Diaspora can also contribute to and influence the policy framework of their respective countries, embracing their cultural heritage and reflecting a demand for domestic tourism. This has the potential to add more value to the tourism policy and create a wider market (Mwatsama, 2005, p.3). Overall, it is critical for African governments to develop a tourism policy that involves the coordination of different agencies working to ensure the successful implementation of suitable tourism strategies. Simpson (2001) stresses that "stable African governments with the political will and strategic plans to support a tourist industry are set to do well."

2.5 Conclusion

Over the years, the development of tourism in African countries in particular, has faced several challenges and has had to deal with many constraints that have so far delayed its progress. A lack of standards, management and administration initiatives, infrastructure development, policy development, and capacity building initiatives has held back the growth of the industry in many countries. In addition, the continent faces challenges not felt by the rest of the world, including a persistent negative image that is usually set off by political instability in many regions on the continent. Both these issues are the most difficult hindrances to overcome. Governments must focus specific attention on creating political stability for the benefit of their people and the country overall, and countries fortunate enough to have overcome political instability must now focus on developing a positive image of their nation. Countries like Rwanda have had to and are having to deal with all these issues. Rwanda is a nation that has had its fair share of political turmoil and is in the midst of rebuilding. The tourism industry has become a priority for the nation and while it is still facing many of the challenges listed above, the development of the industry has come a long way. The next chapter focuses on the history of Rwanda's tourism industry from its early beginnings as an ecotourism hub, through the devastation of the genocide and war of 1994, and finally the current rebuilding process of the industry that has led many in the international tourism industry to take notice.

Chapter 3

The Development of Tourism in Rwanda

3.1 Introduction

The aim of this chapter is to introduce Rwanda's tourism history including a brief economic, cultural and historical summary of Rwanda; all factors that contribute significantly to the role of tourism in the country. Since the beginning of the tourism industry in the country, existing material and records on Rwanda tourism has been scanty, and the few offerings that are available are mainly on the famous Rwanda mountain gorillas which have been at the heart of the country's tourism effort so far (see Gotanegre1992, Shackley 1995). While not shying away from the country's most popular asset, more recently (2001), members of Rwanda's tourism industry have recognised a need to diversify the country's tourism product. This chapter addresses the historical developments as well as major directions in the changing role of tourism in Rwanda's economy, and in particular, the industry's orientation towards international tourism and gorilla tourism.

Section 3.2 begins with a discussion on Rwanda's economic status creating a basis for understanding the country relative to other developing nations. Section 3.3 discusses the history of the country's tourism industry outlining the transformation of the industry from a base for researchers and conservationists, to an eco-tourism hub. This section will also discuss the impact of gorilla tourism and some hindrances to the development of the industry. Section 3.4 takes a more specific look at the effects of the 1994 genocide on the tourism industry including recovery efforts. Section 3.5 analyses Rwanda's current tourism industry including the role of the national tourism board as well as the new vision for Rwanda tourism. Finally, Section 3.6 summarises the challenges to Rwanda's tourism growth.

3.2 Brief Economic Profile

Information on the economic profile of Rwanda (MBendi, 2003; Government of Rwanda, 2005; Institute for Security Studies, 2005; CIA World Factbook, 2006) describes the country as landlocked with few natural resources and minimal industry. Covering an area of 26, 338 sq. km with a population of 8.4 million people, 59% of whom live below the poverty line, the country is one of the poorest in the world and has the highest population density on the African continent, with up to 500-700 people per square kilometre (Plumptre, Masozera, and Vedder, 2001, p.1). About 91% of Rwanda's population are engaged in the agricultural sector and rely mainly on subsistence farming. Accordingly, land is a very precious natural resource, the need for which often overrides other developmental initiatives (World Wildlife Fund, 2002). The primary foreign exchange earners in the country have traditionally been coffee and tea. The catastrophic 1990-1994 war and genocide decimated an already fragile economic base and badly affected the livelihood of the population. The image of the country was damaged, which in turn impacted on both private and external investments. After 1994, the country was faced with the daunting task of reforming its economy. These reform efforts have subsequently brought about a surge of growth during the last ten years, particularly in the agriculture sector which has currently taken the lead (41.6% of the GDP) and employs the largest number of the working population (OTF Group, 2005a).

Although Rwanda continues to depend highly on foreign aid to meet its numerous development challenges, it has, in the last decade, made substantial progress in stabilizing its fledgling economy which has been one of the fastest growing in Africa. Rwanda has also recently (2005) received debt relief from the IMF-World Bank Heavily Indebted Poor Country initiative. Poverty, nonetheless, remains severe, and the government's main economic challenge is to stimulate new sources of poverty-reducing growth. With exports continuing to lag far behind imports, the situation will continue to affect the current account. More significantly, the persistent lack of economic diversification beyond the production of tea, coffee and *coltan* (Columbite-Tantalite), keeps the country vulnerable to market fluctuations. While the development of the primary agricultural sector as well as that of smaller manufacturing and other service industries is badly needed, the government of Rwanda realizes more and more that the

country's budding tourism industry could have greater potential given Rwanda's current stability, travel infrastructure, and several potential tourist sites and other attractions.

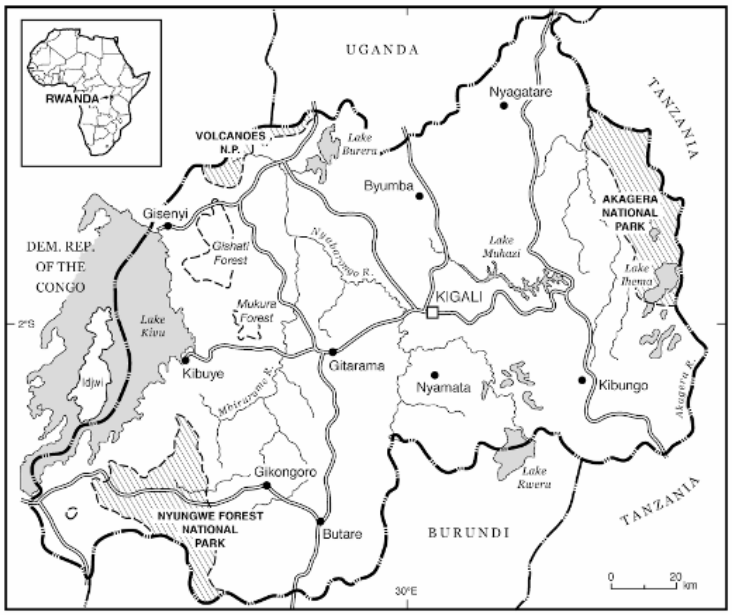
3.3 The History of Tourism in Rwanda: An Overview

Rwanda's fascinating history, its distinct culture and varied natural attractions come together to form a unique experience for any type of tourist. Over the past eleven years in particular, the country has transformed itself into an interesting destination with rich experiences for any visitor. With an infectious enthusiasm, Booth and Briggs describe it as "a vibrant…, safe and energetic nation, well able to tackle the demands of the 21st century and to welcome tourists" (Booth and Briggs, 2004, p.vii). This enthusiasm for Rwanda's tourism was not always the case, as the orientation was different, but since 1994, the industry has undergone a significant overhaul, not the least of which was that Rwanda had to strategically try to establish itself as a unique destination in Africa, especially being a small country and neighbouring important African tourist destinations like Uganda, Kenya and Tanzania. Rwanda's tourism has mainly been based on its natural endowments which coincided with conservation and preservation efforts.

3.3.1 Rwanda's National Parks

The majority of Rwanda's natural attractions are located within its three National Parks. These are the Volcanoes National Park in the northwest, where gorillas may be viewed in their natural habitat; in the southwest is the Nyungwe Tropical Forest, which offers good opportunities for hiking; and, the Akagera National Park in the north east, a popular destination, but still short on game that could be boosted in numbers for competitive advantage.

Figure 3.1: Locations of Rwanda's National Parks



Source: Booth and Briggs, *Rwanda: The Bradt Travel Guide*, 2nd Edition 2004

In 1990, the three National Parks fell under the management of the Rwanda Office for Tourism and National Parks or Office Rwandais pour Tourisme et Parcs Nationaux (ORTPN) as property for conservation as well as development purposes (Plumptre, Masozera and Vedder, 2001, p.1). The three national parks have been the industry's and the country's biggest attractions thus far.

In the far north-west of Rwanda, the Volcanoes National Park sits on the slopes of the Virunga mountain range and is home to the rare and famous mountain gorilla. Nearby are the "seldom visited" but beautiful Lakes Burera, Ruhondo and Karago (ORTPN, 2005a). These attractions and incredible views have made Volcanoes National Park Rwanda's most popular national park, particularly for international tourists. Plate 3.1:

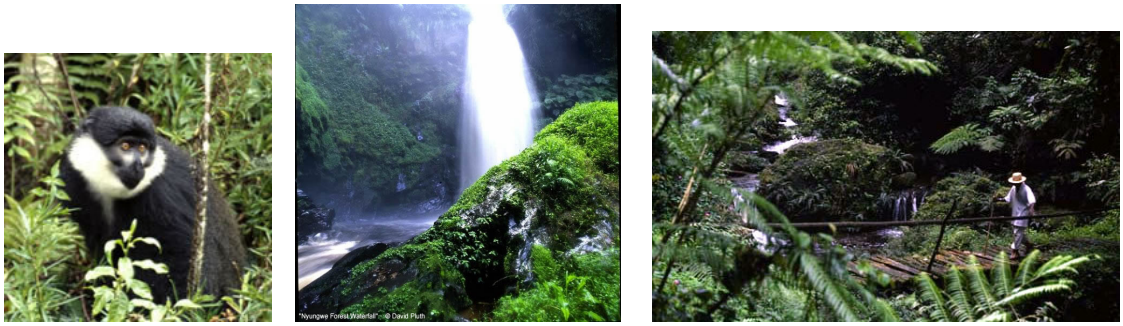
Plate 3.1 Attractions in Rwanda's Volcanoes National Park



Virunga Volcano Chains and primates found in Volcanoes National Park (Mountain Gorillas and the rare Golden Monkey); (Sources in order: www.pbase.com, www.iloveparks.com, Rwanda Development Gateway, Rainbow Tours)

The Nyungwe forest is made up of a variety of ecosystems composed of evergreen and bamboo forest, open grassland, swamp and heath (Rwanda Development Gateway, 2005). Surrounded by a lush forest canopy, the forest is home to several birds (attractive to avid ornithologists) and the rare golden monkey. Plate 3.2. Nyungwe National Park was granted park status only in March 2004 (it was initially Nyungwe Forest Reserve), and the adoption of this status by the government was seen by many in the conservation community as a great contribution to the conservation effort (Ministry of Lands, Environment, Forestry, Water and Mines, 2005, p.30). The national park is made up of Nyungwe Forest, the largest single tract of montane forest remaining anywhere in East or Central Africa with a rich centre of biodiversity including 86 mammal species, 280 birds, 120 butterflies, and around 200 varieties of orchid (Booth and Briggs, 2004, p.139). The Rwanda tourism sector has realised Nyungwe National Park's potential to attract many more tourists than it has been able to in the past, and though lack of accommodation and poor roads leading to the parks have "plagued" tourism opportunities thus far, the Park was selected as a priority by Rwanda's tourism industry for development in 2005.

Plate 3.2 Nyungwe National Park



Colobus Monkey in Nyungwe Forest; Waterfall, Nyungwe National Park; Walkway in Nyungwe National Park (Source: ORTPN, 2005a)

The Akagera National Park is situated next to the Tanzanian border with Rwanda and is named after the river which runs the length of its eastern boundary (Bradt and Booth, 2004, p.216). This “archetypal African savannah landscape” is relatively warm and mixes woodlands interspersed with open grasslands (ORTPN, 2005a). Adverse effects on the Akagera region, especially since the war and genocide of 1990-1994, have negatively affected the park over the years. Poaching greatly reduced the wildlife in the area over recent years, and significant human pressure on the park, including the fact that in 1998 much of the northern and western territory was de-gazetted, has not only reduced the size of the park but also the wildlife living in it (Booth and Briggs, 2004, p.216). Despite these setbacks, there is plenty to see in the park with herds of elephant and buffalo; giraffes, zebras and a variety of antelopes (ORTPN, 2005a). Plate 3.3.

Plate 3.3 Attractions at Akagera National Park



Wildlife in Akagera National Park (Source: Rwanda Development Gateway)



View of Akagera National Park
(Source: ORTPN, 2005a)

According to Booth and Briggs (2004, p.220), the lakes in Akagera "support some of the highest concentrations of hippo you'll find anywhere in Africa". The importance of Akagera National Park goes beyond the conservation efforts in place to maintain it. In order for the tourism industry to thrive, Rwanda must move past the "pit-stop cross border gorilla tourism" that encourages tourists to spend only one or two nights in the country (Booth and Briggs, 2004, p.221). Akagera's diversity and newly developed Akagera Game Lodge, re-opened in December 2003, were marketed and promoted by Rwanda's tourism stakeholders in order to encourage visitors to stay longer in the country, a main goal of the National Strategy. These efforts were rewarded as Park visits to Akagera were shown to have increased by 63% for 2003-2004 (ORTPN, 2005c).

3.3.2 The Growth of Tourism in Rwanda

Rwanda's natural attractions have always been the country's primary tourist attraction. Developing a more diverse industry has been a recent occurrence, based on the need for the country to create a name for itself in the international tourism market, but also to open space for a more diverse group of visitors into the country.

The attraction of the country for international visitors began early. While there is very limited historical information on the growth and development of Rwanda's tourism industry due to lack of records and data, some sources show its evolution as having started in the late 19th century- early 20th century (World Wildlife Fund 2002, Booth and Briggs 2004), though its impact economically was not much felt. This could be because the sole purpose of the British and German scientists and explorers, who came to the

region, came mainly for environmental research within the chain of the Virunga volcanoes and to study the mountain gorillas living within them. Rwanda's varied flora and fauna, diverse primates, and its rare mountain gorillas, including the country's famous Silverback gorillas, attracted several visitors to the country from all over the world, but only as naturalists, scientists, and zoologists. In 1925, the Albert National Park, renamed the "Volcanoes National Park" after Rwanda's political independence in 1962, was created (World Wildlife Fund, 2004). The park, located within the Virunga Volcanoes mountain chain, had since been the site of many studies of gorillas and their surroundings well into the 1960s and beyond (Booth and Briggs, 2004, p.177). At the time of independence, the gorillas were already well known internationally, and despite the problem of overpopulation, the then Rwanda's new leadership vowed to maintain the park for tourists and researchers (Booth and Briggs, 2004, p.177). According to the World Wildlife Fund and ORTPN, several projects and studies were carried out over the years by different organisations promoting conservation efforts mainly in the Volcanoes National Park. Nevertheless, it was not until the zoologist Dian Fossey began her work in 1967 that the study of the mountain gorillas was made most famous. Her life and work were depicted in the 1988 film *Gorillas in the Mist*, "which drew global attention to the plight of the mountain gorilla, and generated unprecedented interest in the gorilla tourism program" (Booth and Briggs, 2004, p.178). Fossey was killed under mysterious circumstances on December 27th, 1985 in her cabin at the Karisoke Research Centre in the Volcanoes National Park where she is buried. Her grave remains an important site for tourists, conservationists, and fellow researchers.

Rwanda Government's dedication to foregrounding tourism as well as conservation was demonstrated on June 18th 1973 when ORTPN was formed with a mandate to focus on and ensure the promotion of sustainable tourism and the conservation of wildlife (ORTPN Strategic Plan, 2004c, p.3). The new organization enabled Rwanda to create new and much needed regulations on national parks, hunting and tourism (World Wildlife Fund, 2002); its main focus, however, remained the conservation of the national parks and of the mountain gorilla. During the 1970s and 1980s, several members of the tourism industry participated in a number of international tourism fairs and exhibitions, but while other attractions were promoted as well, the main selling point for Rwanda was the only well known tourism product: the mountain gorilla. The preservation of the mountain gorilla habitat and the dedication to the conservation of the country's National

Parks was tested in 1979 when plans were announced to clear a large area of Volcanoes National Park for cattle grazing. Conservationists and researchers mainly from the Karisoke Research Centre were determined not to allow this plan to progress further, so they developed the *Mountain Gorilla Project* headed by the WWF. The project, which began in 1979, was aimed at the protection of the flora and fauna in the PNV, the creation of "gorilla tourism", and education for local people in both these regards (World Wildlife Fund, 2002). It also helped to facilitate conservation and initiate Rwanda's gorilla tourism effort (Williamson, 2001).

Research efforts by several international conservation groups plus several private organizations interested in nature conservation continued within the parks throughout the 1970s into the early 1990s. Through projects such as the *Mountain Gorilla Project* and the growing popularity of Dian Fossey's research and lifestyle, eco-tourists in particular became more interested in the region, and tourism in the country began to grow. The positive relationship between conservation projects and eco-tourism could work both ways. As Kruger (2003) indicates, "flagship species" like the gorillas in Rwanda, are often strong drivers of successful eco-tourism efforts and they are often so appealing that related projects frequently thrive. Gorilla research and gorilla tourism started to bring Rwanda into the international spotlight during the mid-1970s. By the end of the 1980s, "gorilla tourism was a major source of foreign currency for the government, second only to coffee and tea exports" (Plumptre, Masozera and Vedder, 2001, p.1). Gorilla tourism has continued to be an important aspect of tourism in Rwanda over the years, and is still very significant to the tourism economy up to now (2005).

3.3.3 Gorilla Tourism and its Economic Impact

For close to 30 years, Rwanda's mountain gorillas have been the country's most recognisable tourism asset. As mentioned on the country's national tourism website, "there are only 700 mountain gorillas left in the world, and Rwanda is home [to] about one third of the total population" (ORTPN, 2005a). The gorillas live in stable family groups with a dominant silverback male, his harem of females, and their offspring (Rutagarama, 2001). As several sources state, the gorillas are peaceful, non-aggressive creatures and usually only become hostile when one of their group is perceived to be threatened or when directly provoked. Being a rare species, they continue to attract

tourists from around the world and to contribute strongly to Rwanda's tourism economy. As Shackley (1995) stated, in 1995, they were estimated to account for 75% of all tourism income. This number had increased to 93% of tourism income by 2004, greatly aiding the tourism industry in achieving their tourism targets of nearly US$2.5 million (ORTPN, 2005c, p.3). Gorilla tourism has contributed significantly to both the national and local economy of Rwanda, and prior to 1990, gorilla tourism was the third largest source of foreign income for Rwanda (GRASP, 2002, p.2). Fine (1995) also emphasises this point, stating that before the war, with few other options, this form of tourism was a way of garnering much-needed foreign currency.

Conservation efforts, particularly as regards the gorillas, have been stepped up in recent years, "thanks to the renewed efforts of the national authorities and the local populations of the three countries harbouring mountain gorillas" (ORTPN, 2005a). Increased protection of the parks and daily observations of the gorilla families has been critical for the success of Rwanda's tourism efforts thus far (Williamson, 2001). The efforts put into promoting the gorillas and maintaining their habitats are critical and, as Williams (2001) states, "research on population demographics carried out at Karisoke Research Centre indicates that tourism has not been deleterious to the gorillas' overall health, behaviour and ecology". Rutagarama (2001, p.2) makes a strong point regarding Rwanda's conservation efforts and effort in Africa overall: "Conservation in Africa and especially during a crisis period is very challenging. It is important to be committed and to face to the situation with a big picture of conservation, a picture which reconciles the need of natural resources conservation with the human concerns (staff and local community) and a good but non- compromising understanding with the political leaders".

The international popularity of the mountain gorillas in Rwanda has brought great attention to the country, and while leaders in Rwanda's tourism industry are enthusiastic to promote other tourism products, they are not about to distance themselves from the gorillas that have made the country famous. As Williamson states, the gorilla has become a national symbol with images of the gorilla being used on bank notes, and national companies and organisations (Williamson, 2001). ORTPN underscores this point: "gorillas play an essential role in contributing to the positive image of Rwanda and act as an [*sic*] ambassadors on the international scene by raising the profile of the country" (ORTPN, 2005a). The gorillas still remain Rwanda's main attraction, and even

though more recently Akagera National Park has been receiving more tourists both locally and internationally, gorilla tourism in Volcanoes National Park has brought the largest numbers of international tourists to the country and continues to do so. In this regard, the gorilla tourism experience has proved to be fundamental to the growth of the national economy. Tourism has been beneficial for the mountain gorillas as well, as it "provides a mechanism for ensuring that the parks and the gorillas are valued for many reasons, and has probably saved the gorillas in the Virunga Volcanoes from further habitat loss or degradation" (Williamson, 2001). Immediately after the 1990-94 war, tourism was essentially a non-existent contributor to the economy, but efforts to preserve Rwanda's natural attractions and increase tourism awareness has driven tourism forward once again to third place in terms of industries set to generate the greatest foreign currency after the war (ORTPN, 2005a). International visitors not only contribute through tourism revenues, however. Conservation efforts over the years designed to ensure the long-term survival of the gorillas have contributed "substantial human and financial resources, and continue to do so" (ORTPN, 2005a). The protection of the gorillas' habitat is a strong priority for Rwanda tourism.

As the main draw for the more than 20,000 tourists from around the world (African Wildlife Foundation, 2005), the gorillas are an economic asset to the country. ORTPN strongly argues that they represent an environmental and social advantage for the country, advising that "the whole country should remain mobilized to keep this remarkable…asset as untouched as possible for future generations" (ORTPN, 2005a). It is in this vein that ORTPN launched its first annual public Gorilla Naming and Fundraising Ceremony on June 25th, 2005, a day that "will become an annual celebration [and] play a major role in rewarding and recognizing the country's conservation efforts" (ORTPN, 2005a). Twenty-nine gorillas were named at the Volcanoes National Park in an official ceremony. Children from the communities near the park proposed names for each of the gorilla infants and officials selected the final names (African Wildlife Foundation, 2005). The ceremony led into the Gorilla Fundraising Gala and both events launched an annual Gorilla Fundraising Campaign designed to attract those interested in Rwanda in general and gorilla conservation in particular. Plate 3.4:

Plate 3.4: Gorilla Naming and Fundraising Ceremony, June 2005



Gorillas to be named in Gorilla Naming and Fundraising Ceremony (Source: www.rwandatourism.com)

The gorilla adoption concept is designed for individuals or companies/organisations to adopt a gorilla and have the opportunity to contribute their donations directly to the preservation of that gorilla's natural habitat. Specific projects include conservation efforts, preserving Rwanda's endangered gorilla population, and assisting in the development of local communities (ORTPN, 2005a).

3.3.4. The Development of Rwanda's Tourism Industry

Even though gorilla tourism in particular and the country's national parks and other natural attractions put Rwanda on the map, in terms of government strategy and the potential economic significance of the industry, tourism still did not take precedence over other industries such as agriculture (Werabe, 2004). As Werabe comments, the tourism

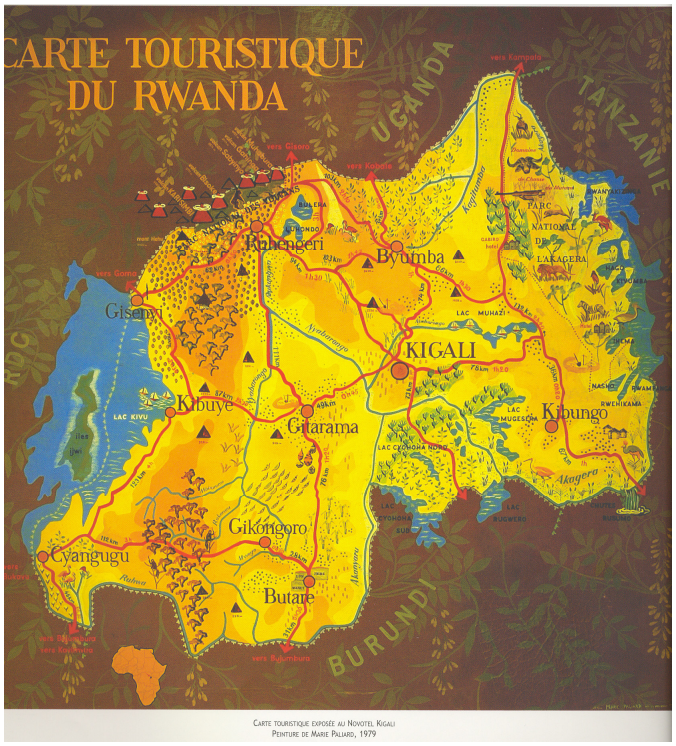
industry, outside the various conservation projects, was never considered an economic priority for the country (Werabe, 2004). Although ORTPN was charged with the promotion and strengthening of Rwanda's tourism industry in 1973, the first Strategic Plan for the development of the industry was not set until 1989, and even then, the plan concentrated mainly on the development of the country's National Parks (ORTPN Strategic Plan, 2004c, p.15). Not only that, but when ORTPN was established, it took long to find a permanent place of its own. From interviews conducted with the Director of Research and Development within the Rwanda Tourism Agency of ORTPN, the tourism sector was moved from Ministry to Ministry and office to office, taking on as it were, a place of secondary importance (Werabe, 2004).

From 1974 when ORTPN was ratified up to 1992, the organisation was placed under the supervision of the Office of the President, but at the beginning of 1992, it fell under various ministries at different stages in the restructuring of the government. Initially, it had been placed under the then Ministry of Environment and Tourism (MINETO) but was later moved to the Ministry of Small Scale Industries, Mines and Tourism (MINAMIT) until it finally fell under the current Ministry of Commerce, Industry and Tourism (MINICOM). With these destabilising relocations and no permanent home of its own, the tourism sector could not have thrived. Instead, it took a back seat to the other sectors with which it shared the Ministry's roof. While the popularity of Rwanda's mountain gorillas grew, thereby increasing visitor numbers in the country, without an official, visible home for years, it is safe to say the pre-1994 tourism industry was still not considered as a significant factor in the economic growth of the country as it could have been.

Furthermore, despite the growth in the tourism sector noted above, the ability of the industry to actively promote a diversified tourism industry in Rwanda was limited. As stated earlier, hardly any literature or records on tourism development existed in the country, and those that are available, have insufficient data. The emergence of a few guidebooks on Rwanda published in the 1950s (focusing mainly on Belgian African territories) and in the 1970s were one point of reference for anyone interested in the country. These guidebooks were an attempt to promote the region, giving general descriptions of the country, including accommodation sites and other practical information (Booth, 2004). One of the main books on Rwanda, *Rwanda: Land of Eternal Spring*, produced by ORTPN in 1974, was the organisation's strongest attempt at the

time to promote tourism in the country. Describing Rwanda as “a land of fabulous tourist attractions” and “a land once visited, never forgotten” (Booth, 2004), the book focuses on the country’s natural attractions including its chain of volcanoes, wild animals and hunting facilities (at the time hunting was permitted), the country’s lake region, cultural attractions and handicrafts, and, of course, the mountain gorillas. A painting of Rwanda’s tourism offerings from 1979 still hangs in the Novotel Hotel in Kigali, Rwanda. Plate 3.5:

Plate 3.5: Tourist Map of Rwanda, 1979



Tourism Map of Rwanda, highlighting Rwanda’s National Parks and provinces, 1979 (Source: *Rwanda Nziza*, Sepia, June 2005)

At the time the book was written, the country’s tourism industry was getting relatively stronger—the airport was being made more accessible for larger aircrafts, and the hotel industry was growing particularly in the capital city, Kigali, with two 60- and 66-room hotels recently constructed. Overall, tourism promotion efforts included “the publication of illustrated literature, action on the part of Rwandan embassies abroad, participation in numerous international trade fairs and exhibitions, the screening of promotional films, and the implementing of tourist development surveys” (Booth, 2004). There was also a strong desire on the part of ORTPN to promote tourism in conjunction with its national

conservation projects, and according to a few sources (Booth 2004, ORTPN Strategic Plan 2004c), the organisation sought the participation of foreign research and/or donor projects in their promotional efforts. Between 1974 and 1990, significant donor aid programmes were created with, among others, the Rwandan Hotel and Tourism Company, the Belgian Cooperation (specifically the Tourism and National Parks Project), and the World Tourism Organization in order to develop and sustain specific tourism projects (ORTPN Strategic Plan, 2004c, p.9). These projects and programs, however "were developed in a spontaneous and ad hoc way" and no long-term or concrete strategy was fully developed or realised (ORTPN Strategic Plan, 2004c, p. 10). In this regard, tourism remained on the side lines of the country's economic development strategy.

3.3.5. Hindrances to the Growth of Rwanda's Tourism Industry

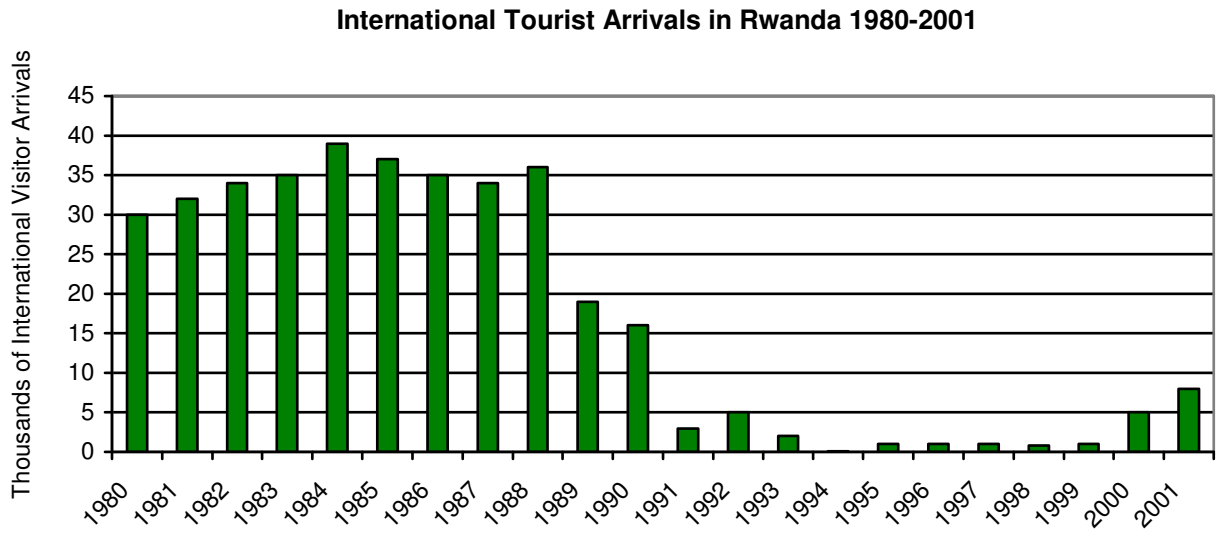
The majority of Rwanda's population since independence in 1962 until today has earned a living from subsistence farming and other agricultural activities. Indeed, with 90% of its population involved in the agricultural sector, land is a very precious natural resource. At times the need for land often overrides other initiatives, as was demonstrated most significantly in 1968 when the Rwandan government converted more than one-third of the Volcanoes National Park towards agricultural development (World Wildlife Fund, 2002). According to ORTPN, the still compelling need for the country's dense population to acquire land and natural resources, such as firewood from the parks and forests, means that the pressures on the environment continue to be very serious indeed (ORTPN Strategic Plan, 2004c, p.12). This puts great pressure on the country's remaining natural ecosystems, whether forested, savannah or wetland (Plumptre, Masozera and Vedder, 2001, p.1), and leads to environmental problems, such as the loss and degradation of precious ecosystems and key habitats, reduction in water levels, erosion and the diminishing of the country's biodiversity (ORTPN Strategic plan, 2004c, p.12). According to a study conducted by Masozera and Alavalapati (2004), in order to resolve this issue, it is critical that "protected areas management must be consistent with overall socioeconomic development plans." These problems notwithstanding, "two national parks and several forest reserves had been established by the mid-1950s for either complete protection or for sustainable management" (Plumptre, Masozera and Vedder, 2001, p.1). Though a large section of these areas were, over time, converted to

agricultural land, “even in 1990 more than 10% of the country was still under some form of protection” (Plumptre, Masozera and Vedder, 2001, p.1). Research within the national parks had continued to develop throughout the 1970s and beyond, in accordance with some conservation efforts on the part of the Rwandan government.

3.4 Effects of the Genocide

Rwanda’s main attraction remained its natural endowments for some time with no focus on the part of tourism authorities on other forms of tourism, such as cultural or historical tourism. This meant that at the time, the government still did not see the full potential of Rwanda as a tourist attraction and of tourism as an economically viable industry (Werabe, 2004) even as gorilla tourism gradually picked up and more tourists were attracted to the small, lush country. The year 1984 was recorded as the peak year with the highest tourist numbers in the country; international tourist arrivals reached a peak of 39,000 (OTF Group, 2005b, p.1). This represented Rwanda’s highest count for international tourists so far (Rwanda’s annual international tourist numbers stabilised from 1984-1988 with an average of around 36,000 visitors). Ten years later, the country witnessed one of the worst tragedies of our time, the 1994 genocide. Besides the resultant negative image of Rwanda in the aftermath of the genocide, conflict in the region and travel warnings that were issued also made it unsafe for many tourists to move as freely through the mountains and volcanoes. Inevitably, this caused an overwhelming plunge in the economy, and a significant drop of tourist numbers to dramatic lows. These numbers fell further to around 19,000 as instability in the country grew, reaching a dramatic low of 1,000 international visitors to the country between 1994 and 1997 (OTF Group, 2005b, p.1). Figure 3.2:

Figure 3.2: International Tourist Arrivals—Rwanda



(Source: OTF Group, 2005b, p.1 based on data provided by ORTPN)

The post-1994 Rwanda had a long restructuring process to undergo and fought off several bursts of sporadic violence over the next few years. Ongoing problems surrounding issues of poverty and a lack of human development were considered by many to be major threats on the road to peace and continued sustainable development (Grosspietsch, 2005, p.11). While tensions still exist and the country continues to suffer from poverty and difficult social and economic conditions, Rwanda strives to rebuild and distance itself from the persistent negative images many people have of the country. For many people throughout the world, their first images of this small African country were those of a horrendous bloodshed. As stated by Booth and Briggs (2004, p.18), "the international media suddenly found Rwanda newsworthy. Chilling images filled our TV screens and the scale of the massacre was too great for many of us to grasp".

Since 1994, Rwanda has been fighting against these negative images, a particularly difficult challenge for its tourism industry. Grosspietsch's research (2004) on perceived images of Rwanda from visitors and international tour operators demonstrates that destination image is indeed critical for the success of a country's tourism development. Indeed after the genocide, all developmental activity, including tourism, ground to a halt: Rwanda was perceived as dangerous and insecure. As a tourism destination emerging

from a tragedy of such enormous proportions, the country lacked tourism experiences and activities on immediate offer, and this was a major concern. Rwanda's exports and investments were lagging behind regional and international benchmarks. The Government of Rwanda (GoR) enlisted the help of OTF Group, an American-based "competitiveness consulting firm that advises developing companies, regions, and nations to be more innovative, increase productivity and create competitive advantage" (OTF Group, 2005c) to execute the *Rwanda National Innovation and Competitiveness* (RNIC) Program. The RNIC aims to increase exports in specific sectors that were chosen for the growth and development of the national economy including coffee, tourism, tea, fruits and vegetables, hides and skins, and mining; build export promotion institutions; and diversify exports. Since 2001, OTF Group has worked with leaders in Rwanda to articulate clear strategies, strengthen public-private partnerships and build the capacity of key institutions.

In 2002 OTF Group conducted a survey of tour operators and potential visitors to Rwanda in order to gain perspective as to how Rwanda could differentiate its tourism product from that of its neighbours as part of the newly developed *National Tourism Strategy*. The survey involved 225 international participants and revealed that 53% of participating potential visitors had either never heard of or knew little about Rwanda and 52% believed it was not a safe place to be (OTF Group, 2002b, p.6; Grosspietsch, 2004, p.225). According to OTF Group (2002b, p.8), the fact that potential visitors had never heard of the country should be good news to members of the tourism industry in Rwanda. This meant that the country could build an image that it wanted to sell to potential tourists without any pre-conceived notions on the part of the tourists, particularly as regards the recent genocide. Overall, the results of the survey confirmed the "prevailing hypothesis that Rwanda needs to improve its image" and provided "additional impetus for the country to quickly engage in an image rebuilding effort" (OTF, 2002b, p.8).

3.4.1 Economic Recovery Efforts after the Genocide

The effects of the 1990-1994 war and genocide on Rwanda's already weak economy were indeed devastating, and even prior to the results of the surveys indicated above, the post-genocide Rwandan government had already set about to repair not only the

country's tarnished image but also its devastated economy which had been affected by a combination of factors: economic ills and historical circumstances exacerbated by the genocide. As the government's *Poverty Reduction Strategy Paper* puts it, "Rwanda's poverty is the outcome of both economic and historical factors. First, the economic structure reflects a chronic failure to achieve productivity increases in a context of a large and growing population…Second, the war and genocide of 1994 left a horrific legacy" (Government of Rwanda, 2002, p.6). Faced with tremendous development challenges, the government set out to develop a *Vision 2020* document as part of the rebuilding process. The document highlighted, among other things, the importance of revitalising the national economy to enable the country to escape from poverty and underdevelopment, and to become a middle income country by the year 2020 by increasing the country's GDP per capita from $250 to $900 for 2000-2020 (OTF Group, 2005a, p.1). This would require "a radical transformation of its historical economic strategies, away from ineffective agriculture-led strategies and more recent humanitarian aid-fuelled growth, toward a diversified economy based on constantly increasing human resource productivity" (OTF Group, 2001, p.2). Overall, *Vision 2020* "illustrates Rwanda's aspirations….and points out where [the country] should be in twenty years time. The strategy aims at….creating an information rich, knowledge-based economy…, developing human capacity as the primary resource, and using ICT as an enabler to achieve other development goals" (Embassy of the Republic of Rwanda, Washington D.C., 2002).

A shift from an overwhelmingly agriculture-based economy to knowledge- and human capacity-based economy meant a focus on industries and services, including the tourism industry, in order to achieve the country's per capita and job creation targets. Immediately after the war, emergency humanitarian assistance was directed mainly to relief efforts in Rwanda, with a more recent shift in direction towards reconstruction and development assistance (U.S. Department of State, 2005). Focusing on specific sector development initiatives and generating investments in the country's business environment became the goals of the government in order to promote sustainable revenue generation (OTF Group, 2001, p.1). The actions outlined in Rwanda's *Poverty Reduction Strategy Paper* (PRSP), also developed in 2002 are based on the original idea set out in the *Vision 2020* document. These include, among others, poverty reduction, human resource development, rural economic transformation, and the

development of services and manufacturing. In addition to these, the PRSP also focuses on short term challenges facing Rwanda's population including health issues, those of reintegration and the pressing issue of "high underemployment in rural and urban areas" (Government of Rwanda, 2002, p.9).

The PRSP document outlines the view of the GoR and its objectives as it aimed at rebuilding the nation: "Since the war and genocide of 1994, we have achieved considerable progress in economic, political and social recovery by adopting radical reforms. We now need to develop a coherent strategy for sustainable development and poverty reduction, avoiding the economic stagnation which characterised the past" (Government of Rwanda, 2002, p.6). As the basis of the national planning effort, the PRSP document presents a strategy for poverty reduction and economic growth. All the action-plans mentioned above require the generation of economic opportunities "to earn incomes outside agriculture" (Government of Rwanda, 2002, p.9) and to diversify the economy. It was at this stage that the GoR hired OTF Group to initiate the RNIC program with tourism among the top sectors selected for development.

3.5 The Current Role of Tourism and its Impact on the Economy

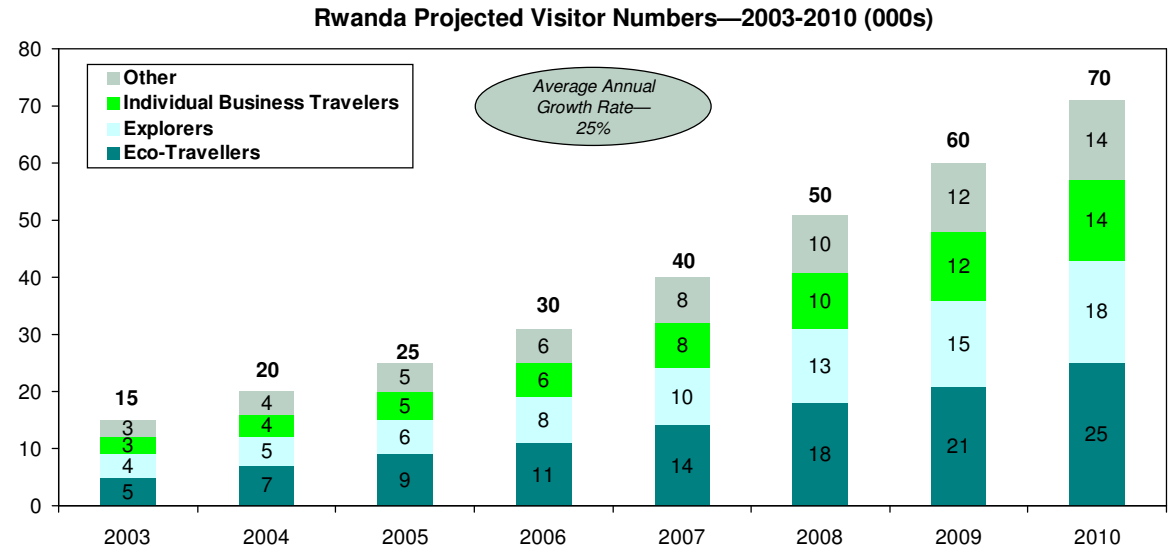
Since 2001, the GoR has been identifying several priority sectors as indicated above, and tourism was also earmarked as a possible poverty reduction tool. Internationally, it has been recognised that "tourism is an important opportunity to diversify local economies" (Ashley, Boyd and Goodwin, 2000, p.1) and the GoR noted this in the PRSP document itself, as it emphasised a need to "develop other engines of growth and to transform [the] economy" including "encouraging the development of tourism" (Government of Rwanda, 2002, p.9). Being a small country, Rwanda has limited options as regards tourism, but "the country's parks and natural forests are [already] a valuable commodity for tourism" (Rutagarama, 2001). In terms of the country's capital, Kigali, the opportunities for growth exist and the benefits for expanding the industry are significant in terms of creating jobs and generating "spin-off development" (Kigali Economic Development Strategy, 2002). Through the RNIC program, OTF Group "developed a *National Tourism Strategy* that was adopted in 2001. The *Strategy* identified a long-term vision and defined several areas to be developed to promote tourism in Rwanda" (OTF

Group, 2004, p.1). A group of 40 representatives from the private and public sectors as well as NGO leaders got together and formed Rwanda's *Tourism Working Group* (TWG) with a mandate to implement the *National Tourism Strategy*. Prior to developing and defining the *Strategy*, the TWG identified the main constraints "hindering the development" of the tourism sector. These included:

- The perception that Rwanda is *not a safe destination*;
- The *limited accommodation* offered at key tourism sites;
- *Limited airlift* to main tourism markets;
- The *restricted range of tourism experiences* offered;
- *Lack of tourism culture* needed to increase service quality;
- *Lack of reliable information* on the tourism industry;
- *Weak public and private sector collaboration*;
- *Business challenges* to the development of the industry (including access to financial capital, lack of qualified human resources, etc.); and
- Regional *political instability*, which was the main reason international tour operators were reluctant to engage Rwanda as a destination (OTF Group, 2005b, p.3).

The TWG had to take into account all these issues in the formation of the *Strategy*. Overall, they "articulated the following vision for Rwanda's tourism industry: 'Generate $100 million in tourism receipts [and 70,000 international tourists] in 2010 by focusing on creating high value and low environmental impact experiences for Eco-[tourists], Explorers and Individual Business Travellers'" (OTF Group, 2005b). Figure 3.3:

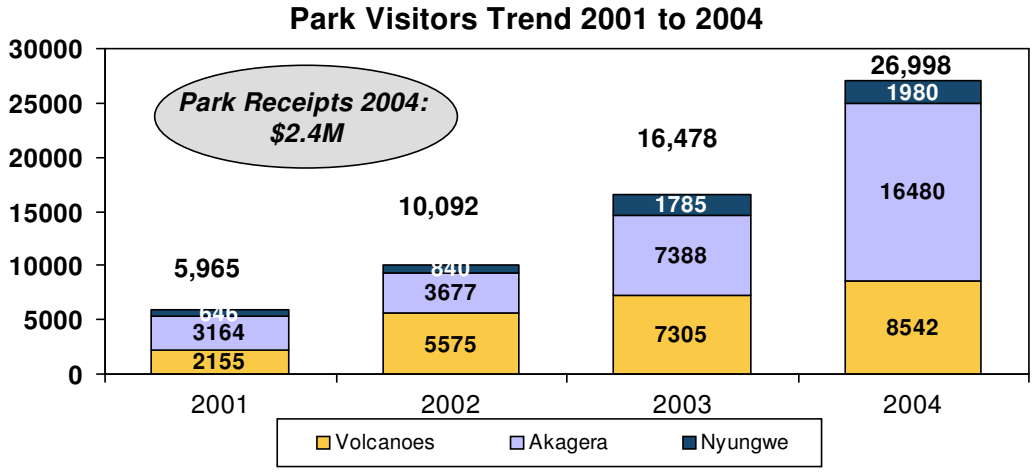
Figure 3.3: Projected Visitor Numbers



(Source: OTF Group, 2002b, p.7)

Rwanda's success in addressing these issues is evidenced by the steadily increasing number of tourists to the country. Figure 3.4. Tourist numbers in Rwanda are most often measured by visitor numbers to the country's National Parks since data collection systems are very limited.

Figure 3.4: Visitors to Rwanda



(Source: OTF Group, 2005b, p4)

However, the *Tourism Strategy* recommends that not just tourism numbers should be targeted, but also the length of stay of foreign tourists. Often Rwanda may be treated as a short 1-2 day stop as an add-on from Kenya or Uganda, so the tourism sector is striving to offer attractive and unique experiences that enable tourists to have a longer length of stay in the country, even as an add-on country, focusing on a variety of Rwanda's peculiar attractions (Rwanda Development Gateway, 2005).

3.5.1 The Role of ORTPN

Through the coordination of private and public sector investments and the development of clear action plans as well as the support of the government, the development of Rwanda's tourism sector became a priority. As the driving force behind the tourism industry, ORTPN was in need of restructuring in order to successfully implement the new policies that were to be developed. Funding for ORTPN had previously been attained through income accrued from national parks, game hunting and government-owned hotels which was enough to cover costs. As Plumptre et al (2001) put it, in the years before the war, "tourism was a major source of revenue for the government and for ORTPN, bringing in around US$1 million as gate fees and an estimated US$3–5 million as revenue spent in the country on food, transportation, and accommodation." As tension rose in the country beginning in 1990 and on, tourist numbers dropped drastically. The radical loss of income caused by the war and subsequent genocide left ORTPN with a severe lack of funding as income from hotels and protected areas no longer existed. The decrease in revenue for ORTPN also left the organisation unable to fully support the salaries of its staff (Plumptre, Masozera and Vedder, 2001, p.1), and this in turn, affected the support of conservation projects in the country's parks and forest reserves. The crisis led to a privatisation process of the government-owned hotels as well as seeking government subsidies and mobilising the efforts of partners including the *International Gorilla Conservation Project* (IGCP), the *Wildlife Conservation Society* (WCS) and the *Dian Fossey Gorilla Fund International* (DFGFI) among others (ORTPN Strategic Plan, 2004c, p.10). It was due to this change that ORTPN's supervising body, the Ministry of Commerce (MINICOM), requested a restructuring process for the organisation, which began on January 28th, 2002 (ORTPN Strategic Plan, 2004c, p.10). It was hoped the process would enable ORTPN to re-examine its mandate and mission and allow it to improve its overall structure and services for the good of the sector.

The creation of two agencies, the *Rwanda Tourism Agency* and the *Rwanda Wildlife Agency* has enabled ORTPN's efforts to be more concentrated in achieving its two main objectives: the development of the tourism industry as a whole and ensuring the integrity of the country's protected areas. The existing tourism initiative is currently centred on the three national parks namely: Volcanoes National Park, Akagera National Park and Nyungwe National Park. Although other sites and attractions are being developed in Rwanda, the parks will continue to be a primary focus for some time (OTF Group, 2004, p.1). In accordance with this, the *Rwanda Wildlife Agency* (RWA) focuses most of its efforts on the "protected areas" around and within the national parks. "Protected areas'" refer to the national parks and savannah and wetland areas. As previously mentioned, environmental pressures like the degradation of the country's precious ecosystems and key habitats, reduction in water levels and erosion, do exist and could expand if not managed appropriately. On the other hand, local populations are also in need of land, firewood and other natural resources, a big problem for the industry. While this is an issue mainly for the government, the RWA is charged with conservation and preservation efforts in such areas (ORTPN Strategic Plan, 2004c, p.12).

The purpose of the *Rwanda Tourism Agency* (RTA) within these same areas is "to ensure diversification, effective and sustainable management of tourism products in the protected areas" (OTF Group, 2004, p.2). The RTA has been charged with creating and implementing a development plan for tourism in each of the national parks and other identified tourism areas. The agency must ensure "diversification and effective management of the services, tourism products and infrastructure in order to promote tourist activities in each protected area" (ORTPN Strategic Plan, 2004c, p.12). These efforts require the cooperation of both the public and private sectors under the direction of ORTPN and the TWG. While most of the RTA's efforts in ORTPN's Strategic Plan centre on the national parks, a critical objective for the agency is to ensure diversification of the tourism product by developing and managing high quality tourism attractions outside of these distinct areas. This initiative by ORTPN generates a focus on natural attractions outside of the national parks, including thermal springs near Lake Muhazi in the east of the country, and unique caves found in the northwest of Rwanda, as well as cultural and historical sites such as the National Museum, the Royal Residence in southern Rwanda, and Genocide memorials throughout the country (ORTPN Strategic Plan, 2004c, p.12).

3.5.2 A New Vision for Rwanda Tourism

In accordance with the objectives set out within *Vision 2020*, which included increasing of competitiveness particularly in the service and industry sectors, OTF Group focuses on the 'competitive' as opposed to the 'comparative' "advantage model", a strategic base the government of Rwanda was eager to follow. The strategy developed by OTF Group and worked on with the TWG and ORTPN, "targeted specific groups of tourists" such as eco-tourists, explorers and individual business travellers, "to develop products that meet their needs rather than providing for general mass tourism" (OTF Group, 2004, p.1). These tourist segments were chosen specifically because they were viewed as having the potential to bring the most significant foreign currency to Rwanda, can maximise the benefits of tourism within the country, and also minimise the negative impacts of tourism on such a small country and its valuable natural resources (OTF Group, 2004, p.1). Among the three tourist segments, as stakeholders in the tourism industry (including tour operators, and hotel and restaurant managers) the TWG initially chose to focus on eco-tourists and explorers as they felt they would generate the most business. Eco-tourists are those who prefer nature products and experiences centred on natural attractions and wildlife; and explorers prefer cultural products that exhibit a country's traditions, art forms and daily life experiences. As previously indicated, part of the strategy is to create high value experiences for Rwanda's tourists. By creating the types of experiences that encompass products that are unique to the country, Rwanda seeks to distinguish itself from its neighbouring countries (OTF Group, 2004, p.1). Based on this, two tours were created within the strategy: the *Primate Discovery Tour* for eco-tourists and the *500 Years of Civilization Tour* for explorers.

The *Primate Discovery Tour* is designed to enable tourists to see the unique and famed mountain gorillas and golden monkeys of the Virungas, as well as the 13 primate species residing in Nyungwe National Park (ORTPN, 2004a, p.1). A *Discovery Centre* is also being established for the Volcanoes National Park where more detailed educational and interactive tools will be used to familiarise the tourists with the park's landscape and inhabitants. This is a particularly important project for the tourism industry and the TWG in particular as many families come to the country, and because children under the age of twelve are not allowed to visit the gorillas, the centre will provide a different and exciting experience for them and any other tourists not able to visit the gorillas

themselves. The tour would also encompass a visit to the shores of Lake Kivu before moving to the dense rainforest of Nyungwe National Park with its 13 species of primates, including chimpanzees (OTF Group, 2004, p.1). According to Grosspietsch's research (2005, p.20), visitors to Rwanda feel that the country's natural attractions are its main assets as a tourist destination. Eco-tourists are a significant market for Rwandan tourism and having such a unique tour, in the form of a "primate safari", could put Rwanda ahead of its competitors in terms of wildlife viewing and 'one-of-a-kind' experiences (ORTPN, 2004a, p.1). The *500 Years of Civilization Tour* enables the visitor to "learn about Rwanda's unique people from before colonization to the genocide and beyond, by visiting Rwanda's museums across the country", the majority of which are currently being developed or rehabilitated. Visitors to Rwanda often express how friendly and welcoming the people of Rwanda are and have shown an interest in Rwanda's traditional lifestyle (Grosspietsch, 2004, p.232). This tour also showcases Rwanda's arts and culture and provides opportunities for meaningful interaction with local communities (OTF Group, 2004, p.1).

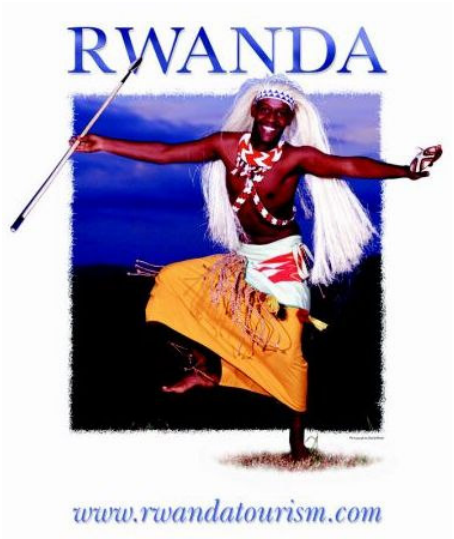
The above-mentioned tours are still being refined and constantly updated (2005), and the desire to expand the current product is the main driving force behind the development of these tours. One of the OTF Group documents indicates that although the current situation (at the end of 2004) shows that the tourism sector is "one of the primary income generating sectors of Rwanda and has provided more receipts than expected", the length of stay of the visitor is much shorter than planned (OTF Group, 2004, p.1). It is specified that "this is primarily due to the fact that the Rwanda experience is still centred …around the mountain gorillas…Rwanda is still selling products rather than experiences" (OTF Group, 2004, p.1). The push to create a uniquely Rwandan product was the impetus behind the development of these tours and is still the main motivating factor.

Although the number of visitors to the parks increased by 39% and park receipts increased by 42% in 2003-2004, it became evident that "the gorillas alone cannot sustain Rwanda's tourism growth" (ORTPN, 2004a, p.1). Despite their tremendous contribution to the industry, concern still remains that international tourism remains gorilla-centred and current growth is therefore unsustainable. This justifies ORTPN's suggestion that Rwanda "needs to move away from Gorilla monoculture" (ORTPN,

2005b, p.1) and explains why in the past few years, Rwanda's tourism industry has been focused on providing a diverse tourism experience for all visitors when re-launching its tourism effort domestically and internationally.

In October 2003, ORTPN and the TWG held a National Tourism Launch in Kigali, designed to inform the local population of the industry's latest efforts and give the weak domestic tourism industry a boost. This launch attracted several VIP guests including His Excellency, the President of the Republic of Rwanda, Paul Kagame, and Cabinet ministers. As the Director of the RTA in ORTPN said, the National launch was designed to declare to the local population that after the effects of the war and genocide, "tourism is being launched again. There is a future for Rwanda and a future for…tourism" (Rwigamba, 2005). In the same year, ORTPN hired the UK-based marketing firm Southern Skies, which was linked to Indigo PR, a public relations firm, to assist the industry to reach markets it could not reach on its own (ORTPN, 2004b, p.15). The role of Southern Skies and Indigo PR was to promote Rwanda throughout Europe and arrange for a successful re-launch of Rwanda tourism to the international market at the World Travel Market (WTM) in London, England in November, 2003. The re-launch of the industry at the WTM was to be the official message to the international community that Rwanda was ready to offer a unique tourism experience to all tourists. "The move represented a strong indication of Kigali's commitment to ensuring that tourism plays a central role in the rebuilding of Rwanda" (Southern Skies, 2003, p.1). As discussed earlier, Rwanda's National Parks are often the most popular attractions, but as part of the industry's diversification efforts, natural and cultural assets are being promoted equally. Cultural tourism is, for example, critical for the industry's growth, but also for ORTPN as part of its efforts to showcase Rwanda's diversity. Plate 3.6:

Plate 3.6: Images Used to Re-launch Rwanda's Tourism Industry 2004





Traditional Dancer performing a dance often used to showcase Rwandan culture and hospitality
(Source: ORTPN)

More recently, at the annual International Tourism Board (ITB) held in Berlin, Germany in March 2005, Rwanda was named the fourth best exhibitor in the category of African exhibitors. At the World Travel Market in London, England, Rwanda's delegation attracted 24 new tour operators from around the world who made agreements with local tour operators to send tourists to Rwanda (Nuwamanya, 2005). Constant research, product development, and marketing initiatives have been highlighted in ORTPN's efforts to sustain the positive effects created by the launches in 2003 (ORTPN, 2004a, p.2). The success of both official launches and a continued presence at international fairs are priorities for the promotion of Rwanda's tourism industry (ORTPN, 2005b, p.4). .According to Southern Skies (2003, p.1), the success of all these efforts means that Rwanda will have laid the foundation for its ambitious plan to increase tourism arrivals five-fold by 2010.

3.6 Conclusion

It is evident that, Rwanda tourism has faced several challenges to its growth and development, and as the country continues to rebuild itself economically, tourism will continue to play an important role in that process. Tourism is widely considered to be one of the sectors that will help the country achieve its economic targets through revenue gains and job creation. So far, Rwanda's tourism product has been aimed largely towards international tourists understandably in order to raise the much-needed foreign currency, and while this has been proving positive as regards achieving industry targets, a dependency on an exclusive market can be detrimental to the industry in the future. The development of domestic tourism has been included in the Rwanda's *National Tourism Strategy* and over the past few years, ORTPN has managed to develop a few projects aimed at domestic tourists. However, while ORTPN and other tourism stakeholders believe in the significance of domestic tourism, development of domestic tourism initiatives has been slow to take place and it has yet to become a major contributor to the industry.

If the tourism sector is to play a more considerable economic role than it has done so far, a vibrant domestic tourism will have to be encouraged. Its success will go a long way to boosting not just Rwanda's tourism industry, but the country's economy as a whole. This provides the context against which the focus turns to analyse the role of a more diverse tourism product overall, and the potential growth of domestic tourism in Rwanda in particular. Chapter four will outline the potential role of domestic tourism in Rwanda and show how further incorporating domestic tourism within the national strategy can develop a culture of tourism in Rwanda, creating a new market for Rwanda's tourism industry and benefiting the economy overall.

Chapter 4
Domestic Tourism in Rwanda and its Potential Impact on Rwanda's Tourism Economy

4.1 Introduction

Chapter 4 brings together the research findings on the role of domestic tourism in Rwanda. The research was carried out using mainly one-on-one interviews, but brief surveys were also conducted with Rwanda's tourism stakeholders on the current role of domestic tourism and the potential impact this market can have on Rwanda's tourism industry overall.

As a background to the current role of domestic tourism in the global tourism industry, section 4.2 discusses the growing role of domestic tourism in developing nations, highlighting the perceived benefits and constraints of the industry. Section 4.3 looks at domestic tourism in Africa, with specific case studies and significant issues that are particular to the continent. Section 4.4 examines the current state of Rwanda's tourism economy, emphasising the role of tourism in the national economy and the main contributors to Rwanda's tourism industry. Section 4.5 outlines Rwanda's current domestic tourism industry with data from surveys conducted with members of Rwanda's tourism industry and information and comments from specific one-on-one interviews with key stakeholders in the country's tourism industry. Finally Section 4.6 looks at the potential of domestic tourism in Rwanda, leading into Chapter 5 which will finalise the findings of this research report and outline recommendations as to how to include domestic tourism in Rwanda's tourism effort in an effective and sustainable manner.

4.2 Domestic Tourism and its Role in Tourism Sustainability

Previous chapters have shown that tourism has significant potential to be an especially valuable tool for stimulating economic growth, particularly in African countries. In order for efforts to be successful, however, the industry must be sustainable and able to succeed even during dips in the global economy, natural disasters and other significant

hindrances to growth. Domestic tourism worldwide helps maintain the sustainability of a country's tourism industry by generating a tourism market able to continue travel despite these threats, something greatly needed by many developing nations. It also creates tourism awareness and a tourism culture within the host country, providing the people with a greater understanding and appreciation of what their country has to offer and instilling pride among the people of the particular nation. While the benefits of domestic tourism must be highlighted, several constraints to the development of domestic tourism need to be addressed as well. There is still significant resistance in many countries when it comes to the development of domestic tourism, so both the benefits and constraints of the domestic tourism sector must be carefully analysed in order to determine the best methods for the success of the sector.

4.2.1 Benefits of Domestic Tourism in Developing Countries

Domestic tourism, particularly in developing countries, is critical for the tourism industry to thrive. With a focus on the domestic tourism market, countries are able to diversify their tourism products and appeal to a wider target audience. Information on domestic tourism in developing countries, however, is extremely scarce. In fact, as Ghimire (2001, p.2) notes, very limited knowledge on tourists in the South exists at all. Among the scanty literature that does exist, there is a consensus on the fact that one of the major benefits of domestic tourism is that while domestic tourists often spend less money per visit, they travel more often and bring greater economic growth particularly to the local communities. Domestic tourists contribute more directly to the services offered by the local population, thereby contributing to the informal tourism sector, maintaining the strength of the industry, promoting pro-poor tourism and as a result, aiding in the poverty alleviation efforts of the country. As previously shown, a survey of literature on tourism in developing countries indicates that countries like South Africa, Nigeria, Kenya, China and India have realised the significant benefits of improving the domestic tourism market, especially with regard to the growth of this market (Ghimire and Li, 2001; Mustapha, 2001; Rao and Suresh, 2001; Kenya News Agency, 2004; Rogerson and Lisa, 2005). Undoubtedly, these efforts result in economic benefits for local communities and a more sophisticated product for international consumers.

Another benefit of the development of a domestic tourism industry is that domestic tourists are not as often deterred from travel based on political, social or economic problems in the region as are international tourists. Rao and Suresh (2001, p.208) point out that "domestic tourism is not vulnerable to bad publicity, internal security problems and poor infrastructure." Basically, domestic tourism helps, among other things, to:

- Maintain the industry during dips in the tourist market, and essentially mitigates many negative threats to the industry. There are in fact several advantages to domestic tourism;
- Sustain demand for tourism when there are seasonal variations in international tourism;
- Conserve foreign exchange by encouraging locals to see their own country rather than travelling abroad;
- Expand investment from richer to poorer areas, also enabling local people to benefit from government investment in tourism infrastructure; and
- Protect the occupancy of accommodation and other services as international tourists decline.

Most importantly, it meets the recreational needs of the resident population, helps to create a tourism culture, and generates awareness about the natural resources of the country and its conservation (Rao and Suresh, 2001, pp.208-209). In spite of these positive aspects of domestic tourism, several constraints get in the way of its growth and development, including a strong bias in favour of international tourism that still remains.

4.2.2 Domestic Tourism Constraints in Developing Nations

Developing countries often encounter several constraints that limit the growth of the industry. Domestic tourism initiatives have often been overshadowed by international tourism efforts, and this is reflected particularly in the lack of data regarding domestic tourism on a global scale. In addition, the survival of a domestic industry relies heavily on the existence of a tourism culture which allows for an enthusiastic approach to travel by the local population. In many developing nations, this culture is still absent. Policies regarding domestic tourism tend to be makeshift and informal and do not have long-term strategies in place, making sustainable growth impossible. Most tourism policies are

generally biased towards the development of international tourism and this bias, termed the 'Northern Bias' by Ghimire (2001), is what deters the creation of possible domestic tourism initiatives. These constraints, discussed further below, highlight factors that need to be addressed before a country can achieve a successful domestic tourism industry.

In order to allow for the advancement of domestic tourism, governments must have existing information on how the industry has grown so far. Yet, while the importance of domestic tourism has been widely acknowledged, significant research and information on the current role of domestic tourism is still lacking. This is a major constraint to the growth of domestic tourism, and this gap stems from the fact that most developing countries view domestic tourism as secondary to attracting the international market, which brings in badly needed foreign currency. As a result, there are very few records of domestic tourism initiatives; "as the dominant official concept of tourism in developing countries focuses on receiving wealthy foreign visitors…most governments have put significant effort into promoting international tourism", and tend to find domestic tourism particularly in developing countries, to be less important (Ghimire, 2001, p.2). This is a continuing trend in developing countries and hinders the progress of a viable domestic tourism industry.

Yet domestic tourism, as Rao and Suresh (2001, p.208) indicate, "is usually the predecessor to international tourism as it helps to create tourism awareness and tourism culture that can sustain international tourism in the long term." While the creation of such a tourism culture is critical to the development and growth of domestic tourism, unfortunately, it is still lacking in many developing countries because it continues to be viewed as a luxury that many locals cannot afford. Developing countries faced with economic adversity will naturally have difficulty generating a significant local tourist population, though in many of these same countries, a sizeable middle-class exists and has the potential to participate in and make use of their country's tourist attractions.

Nevertheless, while there are evidently several barriers to the sustainable growth of domestic tourism in many developing nations, there have already been a few efforts taking place, as mentioned in the introduction to this report. Specific programs by countries like India and South Africa are good examples of countries recognising the importance of domestic tourism and have taken initiatives to ensure the development of

such an industry. Unfortunately in many other cases, governments and the private sector tend to approach domestic tourism policies in an ad hoc manner, formulating policies in an unplanned fashion with only short-term solutions. As Ghimire (2001, p.2) asserts, domestic tourism in almost all developing countries is occurring "without any systematic government planning". A more determined effort in the promotion of this sector needs to be initiated. In 1980, a declaration that followed the World Conference on Tourism in Manila highlighted the importance of domestic tourism's ability to diversify the economy. Domestic tourism was described "as a means to secure everyone's right to holidays, to know his/her own country, as well as to reaffirm national conscience and solidarity". More than twenty years have passed since then, but very little has changed (Ghimire, 2001, p.21). Very few policy measures have been implemented as regards domestic tourism; however, as Shaw and Williams (1994, p.21) point out, "media presentations of 'desirable' lifestyles are leading to an increase in domestic tourism and a greater use of both active and passive leisure time." As more locals are being influenced by Western lifestyles and consumerism, the desire to travel for leisure purposes is increasing. With more nationals beginning to explore their countries on their own accord, it becomes more evident that policies designed to boost their experiences must be created in order to build and sustain this market.

The effect of many of the existing policies in developing nations has meant that the general bias for supporting the development of international tourism has resulted in the tendency to ignore larger domestic flows within developing countries and the emergence of these same countries as major sources for tourism. According to Ghimire (2001, p.2), it is the 'Northern Bias' that continues to suppress the potential role of domestic and regional tourism. In African countries in particular, where the generation of foreign exchange is very necessary for economic growth, creating a prosperous domestic tourism industry becomes a daunting task.

4.3 Domestic Tourism in Africa Today

In 2001 NEPAD developed a document outlining the goals of the organisation, specifically the common vision to eradicate poverty on the continent and create sustainable growth and development. This plan specifically included a "*Strategy for*

Achieving Sustainable Development in the 21st Century" and the development of the tourism industry is one of the means by which NEPAD plans to achieve these goals (NEPAD, 2001, p.1). Among the goals for Africa's tourism industry is that of providing "the African people with the capacity to be actively involved in sustainable tourism projects at the community level" and increase regional coordination and interregional demand for tourism activities (NEPAD, 2001, p.45).

Encouraging Africans to participate in domestic and regional tourism is part of developing sustainability in Africa's tourism industry. According to Dieke (2000), however, intra-African tourist development is still a problem "due to the relative lack of indigenous African tourists". The notion of travel for leisure purposes is still considered to be an extravagance in many African countries, even for members of the middle-class who are more likely to have the time and resources to travel. More often than not, Africa's middle classes either "possess little or no surplus capital for leisure" or when they do, tend to travel to Europe rather than "risk the potential hazards of visiting their neighbouring African countries" (Dieke, 2000, p.34). This "euro-dependent" pattern in Africa is a key hindrance to the development of domestic tourism, and has several negative economic implications. As Poirier argues, a lack of resources and significant financial, cultural and infrastructural obstacles also hamper efforts aimed at promoting domestic and intra-African tourism, which would lead to a self-sustaining industry (Poirier, 2000, p.30).

Economic hardships throughout Africa often stop short the potential for the continent's middle-class to participate in leisure activities; however, countries that are in the process of re-building or those that have opportunities for growth, are finding themselves with a more willing and able segment of the population. In countries like Nigeria, the country's middle-class felt the hardships of an economic downfall in the 1980s, which still resonates today and has left them more concerned with survival than leisure (Mustapha, 2001, p.187). By contrast, countries like South Africa and Rwanda which have seen the recent emergence of a new middle-class with a more disposable income are facing a growing sector of the population that is now enthusiastic about travel, resulting in more journeys within each of the two countries.

The role of domestic tourism in other African countries has also been recognised and countries like Ghana, having realised the potential of a thriving domestic tourism industry, are attempting to capture this market. The president of the *Ghana Tourism Federation* (GHATOF), recently (2005) appealed to the media to educate the public on the importance of the tourism industry to the country, stating that "the media play an important role in the growth, development and promotion of tourism by creating the right mental images of Ghana as a tourism destination for the prospective tourist both domestic and foreign" (Hatsu, 2005). In October 2005, an "*'Eat Ghana', 'Drink Ghana', 'Sing Ghana', 'Dance Ghana'*" cultural festival was created to celebrate Ghana's tourism image, and was targeted at both domestic and international tourists (Hatsu, 2005).

In Kenya, it has been acknowledged that domestic tourism "indirectly impacts and potentially benefits the local communities of Kenya" (Marshall, 2004, p.6). For example, during the low tourism season in Kenya (from April to August) when many tourism workers have to be laid off, a strong domestic tourism sector can diminish this threat as "the seasonality of tourist expenditure would become less defined and workers could keep their jobs year round" (Sindiga, 1999; Marshall, 2004, p.6). Domestic tourism leads to an understanding of what one's country has to offer and this can benefit the people greatly. In discussing the current situation in Kenya, Marshall (2004) underlines that such an understanding "will empower the people of Kenya and equip them for future national and regional decisions".

4.4 The Tourism Economy in Rwanda

The benefits of domestic tourism in many African countries are beginning to be recognised, thus encouraging the development of this segment of the tourism industry which occupies such a significant percentage of the GDP of many countries. Rwanda is one such African country. During the years of civil war that culminated in the 1994 genocide, Rwanda's GDP experienced a depression, "posting a dramatic decline at more than 40% in 1994, the year of the genocide" (U.S. Department of State, 2005). In 1995, the first postwar year, the GDP saw an increase of 9%, signalling the "resurgence of economic activity, due primarily to massive foreign aid" (U.S. Department of State, 2005). Humanitarian aid brought into Rwanda to support reconstruction and

development assistance sustained the country during a devastating period in the economy. Since then, the Rwandan economy has been “one of the fastest growing in Africa and indeed the world.” From 1998-2002, real annual GDP growth averaged 7.7%, slowing down to an estimated 3.5% in 2003 (Institute for Security Studies, 2005; IExplorer, 2005).

After the war, the new Rwanda government, formed in 1994, restored security throughout the country, returned most subsistence farmers to their fields, and directed their focus towards “poverty reduction, infrastructure development, privatisation of government-owned assets, expansion of the export base, and liberalisation of trade” (U.S. Department of State, 2005; Institute for Security Studies, 2005). Poverty does still exist, and the main economic challenge facing the government is “to stimulate new sources of poverty-reducing growth” (Institute for Security Studies, 2005), which includes the development of manufacturing and service industries, tourism among them. The government set out to achieve these goals towards the late 1990s and into the new millennium. As has been echoed by many authors, for countries with “a limited industrial sector, few natural resources and a dependence on international aid, tourism may represent the only realistic means of earning much needed foreign exchange, creating employment and attracting overseas investment” (Sharpley, 2002, p.15). In the particular case Rwanda, which had to recover from war and devastation, as an industry, “tourism can generate new sources of income without significant new investments” (Christie and Crompton, 2001, p.15) and has several economic advantages, not just for the industry itself but acts as an entry point to several other industries. It creates jobs in the construction, transport, telecommunications and financial fields and also creates links to the informal sector (Christie and Crompton, 2001, p.14).

In increasing the role of service industries in the country, the tourism industry was considered to have “far greater potential given the current stability, travel infrastructure, and available animal parks as well as other potential tourist sites” (U.S. Department of State, 2005). As one of the largest industries in the world, tourism is continually growing and tourism receipts are “of critical importance to many countries’ balances of payments and general economic welfare” (Natsios, 2004). As noted in the previous chapter**,** tourism has made a significant contribution to Rwanda’s economy, and currently (2006) ranks third in terms of the country’s export industries along with tea, after mining and

coffee (OTF Group, 2006), and according to the Rwanda Investment and Export Promotion Agency (RIEPA), around US$ 89 million worth of investments of new tourism products was added from 2001-2005 (Kacou, 2005). The industry has revived itself over the past few years and owes its success mainly to international tourists visiting the national parks, and more recently, business travellers that are coming to the country for the many conferences and events the country has held in its three main hotels. These have included major international, regional and local conferences ranging from:

- The *NEPAD Summit* with eleven heads of state and governments held in February, 2004;
- The *Conference to Prevent and Banish Genocide through Active Universal Solidarity* in April, 2004;
- The *Festival Pan-African de la Danse (FESPAD)*, the pan-African dance festival in August 2004;
- The *Society of Women and Aids in Africa International Conference* in May, 2005; and
- The *10th Summit of the COMESA Authority Heads of State* in June, 2005 which was attended by over 10 heads of state and government and over 1,200 delegates.

Rwanda's tourism receipts reached around US$ 26 million by the end of 2005, up significantly from US$ 17 million in 2004. Park visitors and business travellers, account for these receipts, making up 61% and 39% of recorded tourism receipts respectively, with park visitors spending an average of US$ 268 per day and business travellers spending an average of US$ 150 per day (OTF Group, 2005e). The majority of money earned from park visitors is due to park entrance fees. In July, 2004 ORTPN increased the price of gorilla permits for international visitors from US$ 250 –US$ 375, compared to the price for local tourists which is currently at FRW 10,000, the equivalent of about US$ 18. In order to make a tourism experience more successful, countries often charge more entry fees from tourists from developed countries, increasing revenue creation substantially (Kruger, 2003, p.16).

In Rwanda's case in particular, the higher prices at the Volcanoes National Park not only increase tourism revenues, but also act "as a necessary means to try to control the high

pressures put upon the gorillas and the park authorities" since the gorillas have a limit in terms of the number of people who can visit them per day (Williamson, 2001). The government policy on the gorilla permits therefore renders the contribution of local tourists quite minimal. However, the proper development of domestic tourism in Rwanda would not centre on encouraging locals to spend more money on the national parks. Creating a sustainable domestic tourism sector would mean generating tourism products that would appeal to the national population and encourage spending on new as well as existing experiences. Currently, Rwanda's tourism industry is heavily dependent on eco-tourists and individual business travellers, as mentioned earlier. It might be important at this stage of Rwanda's tourism development to minimise the threat of over-reliance on any tourism segment. Rwanda's tourism stakeholders have already set some plans in motion to generate an interest in tourism. While many of these initiatives have begun, however, proper marketing and promotion programs (by sources other than the national tourism board, ORTPN) geared towards Rwandans is minimal and has therefore hindered the success of these initiatives.

4.5 Rwanda's Current Domestic Tourism Situation

In order to gain a better understanding of the current situation of Rwanda's domestic tourism industry, focused interviews were conducted with three key participants in the development of Rwanda's tourism strategy: Eric Kacou, Director of the Rwanda National Innovation and Competitiveness (RNIC) project that is charged with developing and helping to implement Rwanda's *National Tourism Strategy*; Rica Rwigamba, the Executive Director of the Rwanda Tourism Association of ORTPN; and, Joseph Birori of Primate Safaris, one of Rwanda's leading tour operators. In addition, surveys were distributed to 10-15 of Rwanda's tourism stakeholders including tour operators, restaurant owners and members of the national tourism board yielded ten responses, the results of which are outlined below. Survey respondents indicated that they believed that there is a strong demand for domestic tourism in Rwanda; that it can help create tourism awareness and a tourism culture; that it is important for the growth of the national economy; and, that it has the potential to sustain the overall tourism industry. The majority of respondents believe that Rwanda's current tourism products are

sufficient to attract domestic tourists, but some still believe new attractions are necessary to draw domestic tourists to participate in the industry.

When Rwanda's *National Tourism Strategy* was initially created, there were two main things the industry needed in order to make it competitive at an international level. First, there needed to be a "change in the beliefs and attitudes" of those in charge of the industry (Kacou, 2005). After the devastation of 1994, many leaders were sceptical that any tourist would be interested in visiting the country and doubted that the industry could be successful. Second, there was a need to build a common vision and this was done through the creation of the Tourism Working Group (TWG) which helped develop a new perspective on the potential role of tourism in Rwanda (Kacou, 2005). When the strategy was created, the role of domestic tourism was addressed, but the main goal of the strategy was to look at what was needed at the time "in order to prioritise the industry" and what Rwanda needed was to develop world-class experiences for all tourists (Kacou, 2005). As survey respondent Fidèle Ruzigandekwe (2005) of ORTPN indicated, Rwanda's tourism industry is "quite a young industry" and the development process has just begun. Domestic tourism was always a part of the *National Tourism Strategy*, but international tourism was the focus in order to build and sustain the industry, and therefore it took precedence. Emmanuel Ruzibiza (2005), a member of the Tourism Working Group stated in his survey response that "any tourism strategy in Rwanda is outward looking" and this may become a problem when it comes to convincing Rwandans to participate in domestic tourism.

The fact that domestic tourism was not a priority in the *National Tourism Strategy*, however, did not result in members of the industry discouraging local tourists to travel in Rwanda. What was lacking was the direct promotion of domestic tourism. Even though domestic tourism was not a main factor in the strategy, local tourists have shown an "unexpected participation" in tourism since 2004 (Rwigamba, 2005). In order to promote tourism and the new strategy for tourism development, ORTPN has participated in several local events and exhibitions, winning medals for the best stand and encouraging Rwandans to tour the country (Rwigamba, 2005). Participation in these events made tourism more visible to Rwandans. Rwigamba (2005) has noted that more recently "people [in Rwanda] want to spend" and visit places in Rwanda. Clearly, the potential for

domestic tourism growth exists, but members of Rwanda's tourism industry have yet to grasp this potential and utilise it to the full benefit of the country.

Kacou agrees that domestic tourism has the potential to contribute to Rwanda's tourism industry and to the national economy in several ways, among which are those cited below:

- When domestic tourism begins to grow in the country, people will begin to believe in it and gain a sense of national pride. This pride will encourage locals to go out of their way to ensure that tourists enjoy their stay by providing friendly service and knowledgeable information;

- Domestic tourism can also help non-5 star hotels and restaurants in the country get steady business, and since domestic tourism is the biggest generator of jobs, it will create a more consistent market demanding consistent service;

- Domestic tourism also has the potential to expand the industry by:
    - encouraging entrepreneurs to invest in industries, bringing in bigger investment companies and therefore creating more jobs;
    - protecting local historical and cultural assets so that they become or remain tourist-generating sites; and
    - building new products and experiences (Kacou, 2005)

Kigali restaurant-owner, Aaron Makuba (2005), states that maintaining a strong international tourism industry becomes very difficult if the domestic tourism sector is not successful. Ruzigandekwe (2005) of ORTPN was of the opinion that "domestic tourism encompasses an important segment relevant to the national economy", a point which was echoed by several other survey participants. Nyagah Mbae, a survey participant and tour operator in Kigali, believes the benefits of domestic tourism are quite extensive. Not only could domestic tourism "create a cultural understanding among the diverse people of the country", but it could also provide a more sustainable employment industry as the tourism industry would be operating year-round and not just during peak times of the year (Mbae, 2005). This practice would inevitably provide individuals with a more steady income.

Another survey respondent, Tim Muzira from USAID states that “domestic tourism will contribute to improving rural livelihoods through employment” (Muzira, 2005). Job creation is highly significant particularly for Rwanda, as it can lead, as Kacou observed, to a reduction of the possibility of conflict later on (Kacou, 2005). Adding to these opinions, Rwigamba (2005) believes that sustainability is the biggest benefit of domestic tourism. She states that “Rwandans are people who consume the products the whole year through” and participation in the tourism industry will mean that hotels, for example, can have relatively high occupancy rates throughout the year. This will be very beneficial for Rwanda as a more consistent clientele will encourage more investments in the industry (Kacou, 2005; Rwigamba, 2005).

The demand side of the market for domestic tourism in Rwanda targets several segments of potential tourists within the country. These are the expatriates, Diaspora returnees, more affluent Rwandans, and school children. This means that domestic tourism promotion and marketing efforts will be approached differently depending on which segment is to be targeted. Joseph Birori (2005) from *Primate Safaris* admits that “tour operators have not done enough to promote domestic tourism” and that while Rwandans want to join in the tourism effort and the potential of a successful domestic tourism effort is there, a lot of work remains to be done. Like Kacou, Birori makes the point that there are different tourist segments in Rwanda’s domestic tourism population, and that tour operators must target them differently. Expatriates in the country tend to behave like foreign tourists in their desire to explore various parts of the country and participate in experiences (such as gorilla trekking) that Rwandans are less likely to participate in. Promoting Rwandan experiences to Rwandans would require different approaches by tour operators and other members of the industry, and these are the approaches that need to be addressed and developed. The goal must be to ensure that a bigger percentage of the country wants to enjoy the experiences offered (Kacou, 2005). The government, represented by ORTPN, has “put in a lot of effort in putting up products” (Birori, 2005) and now it is up to the private sector to market these products to the people.

ORTPN’s participation in domestic tourism initiatives was more evident over the past couple of years, 2004-2005:

- In October 2004, ORTPN began a targeted campaign of tourism awareness directed towards Rwandan school children, resulting in 1300 children visiting the national parks since then;

- As part of this campaign in 2004, ORTPN started petitioning the Ministry of Education to include tourism and conservation-related education in schools and to give financial support to help sustain the existing training schools;

- In 2005 the promotion of the Kigali City Tour geared towards business travellers as well as tourists living in Rwanda gained momentum and promotion efforts by ORTPN towards the local population were increased;

- Cultural exhibits in particular have been highlighted for local tourists including fundraisers to refurbish historical sites and generate new experiences;

- Throughout 2005 ORTPN participated in several local exhibitions and events providing tourism information for the local population;

- ORTPN has supported local sports events in order to gain local recognition for tourism such as the Kigali Peace Marathon in May 2005 and the Gorilla Rally in August 2005;

- ORTPN's Gorilla Naming Ceremony in June 2005 was conducted with local community involvement as well as regular promotional efforts for the event done over the main local radio stations and televised to target a larger portion of the population;

- Partnerships with both the government and the private sector have been formed to encourage the distribution of tourism information to the population (Kacou, 2005; Rwigamba, 2005; OTF Group, 2005d)

This aggressive approach is reflected in Rwigamba's assertion: "anywhere we can give information, we will be doing that" (Rwigamba, 2005). As was stated by all three key interviewees, the actions taken by ORTPN have been worthwhile, but what is needed

now is the follow-up of each of these activities. Many survey respondents from the private sector felt that government support was very marginal and that more cooperation from the government would lead to better and easier implementation of some of these programs. Despite this setback, it has been acknowledged by members of the TWG that it is now up to Rwanda's tour operators and the private sector to expand on the initiatives that have been taken by government so far. It is very important for tour operators to begin promoting tourism within local communities, but they must consider the main constraints to the development of this sector. Overwhelmingly, the survey participants and interviewees stated that the lack of *information* and *affordability* were the main hindrances to domestic tourism development. There was a general feeling that in order for the population to be able to participate in the industry, they must first understand what is happening in Rwanda tourism. Kacou (2005) states that different information sources depend on the specific segment being addressed.

Rwanda's expatriate population is an untapped market that is very important to the tourism effort in Rwanda as they are able to encourage friends and family living abroad to travel to the country. As Rwigamba notes, this segment has also been neglected (Rwigamba, 2005) and has several concerns of its own which ORTPN is addressing. For example, many expatriates do not believe they should be charged similar park entry fees as foreign visitors to the country. ORTPN addressed this concern by creating yearly gorilla permits at a lesser cost for foreign residents, encouraging them to visit the gorillas and other parks more often while living in Rwanda (Rwigamba, 2005). In terms of tourism promotion, Kacou (2005) believes that expatriates can be best targeted through their embassies, hotels, and newsletters.

Rwanda's Diaspora population is also a significant market that needs to be tapped. Several tour operators acknowledge the impact the Diaspora can have on Rwanda's tourism effort, and this impact has been demonstrated recently both through the annual *Rwanda Convention* that held its second annual convention in July 2005 in Houston Texas, and the annual *Rwanda Diaspora Global Convention*, the most recent of which was held in Kigali in December, 2005. The *Rwanda Convention* had a special focus on tourism in Rwanda at both the first and second annual conventions, with ORTPN as special guests. Members of the Diaspora are increasingly more willing to travel within Rwanda and are now specifically seeking to invest in Rwanda (Rwigamba, 2005). These

conventions should stimulate tour operators and members of the tourism industry to follow through with what ORTPN has begun by specifying all the tourism opportunities available for any tourists. In terms of attracting Rwandans living in Rwanda, radio programmes and major events are the best sources for tourism promotion. Kacou (2005) observes that major events in particular, attract Rwandans, so they would be more willing to participate in tourism-related events, albeit members of the tourism industry have not explored such events adequately.

In terms of affordability, as is typical of most developing countries, the majority of Rwandans cannot afford to travel for leisure and could not justify spending the little money they have for such purposes. Mika Inamahoro, another participant in the survey from the Dian Fossey Gorilla Fund International (DFGFI), explains further that for this segment of the population, "travel for leisure sounds like a foreign language" (Inamahoro, 2005). In his survey response, Makuba (2005) explains that "the majority of the population lives in an economically precarious situation," making it very difficult to encourage travel and tourism. For this reason, many tour operators have not seen the value in promoting tourism to the majority of people in Rwanda as they lack the buying power that international tourists often have. It still becomes necessary, however, to think about how to satisfy both markets as "it is still necessary to create a culture of tourism and make tourism sites available [to Rwandans]" (Makuba, 2005). The majority of the population must therefore be targeted for tourism participation in other ways.

Part of creating a culture of tourism in Rwanda and encouraging the participation of all Rwandans in tourism is to educate the population about its importance. John Kayihura, a leading Rwandan tour operator asserts that domestic tourism is necessary to encourage Rwandans to appreciate, enjoy and learn about their country. This knowledge and sense of appreciation will lead to a more concerted effort to protect and conserve Rwanda's tourism assets (Kayihura, 2005). Inamahoro of DFGFI feels that "if Rwandans do not know what their country has and is about, they will not understand their role in biodiversity protection. If the entire population understands the beauty and richness of their country, there will then be millions of people out there doing tourism marketing for their own country" (Inamahoro, 2005). Survey participant Rajan Tiwari of *Kiboko Tours and Travel* in Kigali echoes Inamahoro's statement and adds that exposure to tourism is a must in all "nurseries, schools, colleges and universities and *ministries*". He adds that it

is important to note that at the moment, expatriates are advising Rwandans on the country's attractions when it should be the other way around (Tiwari, 2005).

In addition to educating Rwandans on the importance of the industry itself, educating Rwandans on the job opportunities available to them through tourism and the benefits of working in the tourism industry will lead to a stronger desire to participate in the industry. Currently, Rwanda's tourism training institutions and schools are failing because they lack support (Birori, 2005). They are inefficient and do not meet standards of a productive tourism industry. If the government and the private sector gave more priority to tourism institutions, more people would be willing to get involved in the industry. According to Birori (2005), many Rwandans do not respect jobs in the tourism industry and feel they are "beneath them" particularly those that involve serving others. He states that such beliefs are "letting us down as members of the tourism industry" (Birori, 2005). Changing the view of tourism and emphasising to the local population that jobs in tourism are respectable and can earn an individual a good salary, would go a long way towards improving the industry. Creating a stronger tourism industry means more and better jobs and this is something that needs to be instilled in the psyche of the population at large.

There are several Rwandans who can afford the time, who have the means to travel and are eager for the opportunity. There are also those who can afford the time and cost, but still do not think of tourism as something they can be involved in. Those who are eager to travel in Rwanda approach tour operators or staff at ORTPN on a personal level to ask which activities are available to them in Rwanda, and take it upon themselves to seek out these activities or interests. In 2004, Rwandans surprised the tourism industry by making up over 40% of the tourists who visited Akagera National Park without much prompting from the industry (Birori, 2005; Rwigamba, 2005). This "unexpected participation" was evidence that Rwandans want to travel and need to be targeted as a legitimate tourism market. The efforts made by domestic tourists to travel on their own means that there is a potential that is not being tapped into. Some Rwandans are more willing to pay for services that they see improving and experiences that they can enjoy (Rwigamba, 2005).

Many other Rwandans, however, are not as in tune with a tourism culture and are not sensitised to the culture of holiday-making and taking long weekends away from home. They can afford to travel but do not have the inclination to do so and are not informed enough to understand which tourism activities they may enjoy. As Kayihura (2005) aptly states in his survey response, “citizens of most countries hardly ever notice the beauty of their own surroundings and simply take [them] for granted. Until awareness is created and tourism culture is promoted, it will be hard to achieve.” Many Rwandans still believe that tourism is for foreigners and expect prices or experiences to be out of reach. Ruzibiza (2005) felt that Rwandans often believe that Rwanda’s tourism products are not for them. Inamahoro believes that middle-class Rwandans still need to be taught about vacations and holidays: “a whole education program about vacation and leisure as a *concept* needs to target the nouveaux riches,” expand their minds with regard to what activities they can take part in, and encourage them to take advantage of holidays (Inamahoro, 2005). This is a major factor in Rwandans’ attitudes to travel within the country, and is something Birori says tour operators must address; they must “play their part” in promoting tourism to the majority of the population (Birori, 2005).

A key hindrance to the development of tourism for the local population is the lack of activities on offer. While some Rwandans enjoy nature-based activities and exploring Rwanda’s national parks, informal research has indicated that these are very few compared to the majority of the population that prefers cultural-based activities and relaxation (Birori, 2005; Rwigamba, 2005). The current attractions, according to Birori, are attractive to potential domestic tourists but there is a need to emphasise activities involving weekend getaways to the lakeside. Rwigamba (2005) adds that local tourists have already expressed an interest in Akagera National Park (which is a more relaxed, game viewing excursion) and the Lake Kivu region, which is encouragement enough for tour operators to improve on the products offered in these areas. Lake Kivu encompasses the cities of Kibuye, Gisenyi and Cyangugu, all potential relaxing spots for Rwandans who enjoy such experiences. Currently, however, there is not much to do at the lake. While there are nice lakeside hotels, particularly the Kivu Sun hotel in Gisenyi which was opened in July 2004, some of these are “beyond the reach of many [Rwandans]” (Birori, 2005).

At Kibuye, while there are more affordable hotels, there is also very little to do in terms of activities. There are no boats or water sports available for tourists, so thus making a trip to Kibuye is dull (Birori, 2005). While Birori (2005) noted that the lack of a tourism culture on the part of Rwandans is a hindrance to the growth of the sector, the availability of products and the strengthening of the tourism culture go "hand in hand". As Birori says, one cannot sell what one doesn't have, and tourists are convinced to travel based on what is on offer. If the products are available for the tourists, it is much easier to promote a culture of holidaying in one's own country (Birori, 2005). Mbae believes that since domestic tourism is so prevalent around the world, "there is no reason why it cannot be so for Rwanda" (Mbae, 2005). This optimism is echoed by Rwigamba (2005): "there is so much that Rwandans have to discover about their own country"; the numerous sites, their own culture and a history that has so much to offer, and until Rwandans are willing to discover Rwanda, she cautions, "our tourism will always be somebody else's tourism" (Rwigamba, 2005).

4.6 Potential Impact of Domestic Tourism on Rwanda's Economy

The tourism industry has managed to make an impact on nations not only economically, but socially as well. In Africa, tourism is not only seen as a means to strengthen existing economies, but also as a means to rebuild them. This rebuilding process means that the people themselves must make a significant contribution to progress, and their involvement in the tourism industry is one way of accomplishing this. In Eritrea, for example, "the tourism sector was considered to be a strategic sector by the government and one that would play a critical role in the nation's recovery program" (Burns, 2000, p.107). For thirty years, Eritrea has been dealing with the effects of a devastating war that has made it one of the poorest countries in the world. Efforts made towards reconstruction are daunting and for most of the population that live a subsistence lifestyle, aid imports have been supporting them thus far (Tzehaie, 2005). Eritrea's reconstruction and national development efforts included the development of the tourism industry which has made a contribution thus far, but "remittances from overseas Eritreans, coupled with local tourism by those who return for visits, are Eritrea's main source of foreign exchange" (Tzehaie, 2005). Members of Eritrea's Diaspora have

participated in and encouraged local tourism, contributing significantly to economic development and national pride. This is a very similar situation to that of Rwanda.

The people of Rwanda must take ownership of their tourism industry. This sentiment was echoed by survey participants and most believe that a significant and positive difference will be felt in the tourism industry once Rwandans begin to participate in it. All participants recognised the difficulty in the development and growth of domestic tourism which lies in the fact that most Rwandans cannot afford to travel and explore their country. Much like Eritrea, however, the contribution to the progress of the domestic tourism industry does not lie solely in travel by the population, but in the process of expanding and rebuilding the tourism industry. The participation of all Rwandans in tourism through travel as well as employment and participation in education goes far beyond economic gains. Eric Kacou (2005) of OTF Group specifies that in Rwanda, domestic tourism is about more than just travel, but "it is about pride". The leadership of the country has worked hard to rebuild the nation as "one people, one nation, and one culture", and tourism has a big role to play in encouraging Rwandans to see their country as their own, as a country they have worked to rebuild and they can now enjoy (Kacou, 2005).

In a nation recovering from the ravages of war and genocide, domestic tourism can also play a significant part in the healing process leading to national unity and reconciliation. Participants in the survey all see the promotion of Rwanda's cultural tourism efforts as the best angle with which to attract Rwandan domestic tourists. Kayihura (2005) views the promotion of cultural tourism as critical because the new generation of Rwandans need to know and understand their culture." As well as learning about their own culture, the exposure of Rwandans to other cultures can only be beneficial. While "not all values that tourists bring are good, [most of the time] bonds are created, friendships are made", and it is an opportunity for locals to get a new view of the world, making them "look forward to something better and exciting in their lives" (Kacou, 2005). As part of developing tourism awareness in Rwanda, members of the industry must explore domestic tourism if this awareness is to be meaningful. The more the participation increases, the greater chances for the industry's sustainability.

In final analysis, Rwanda's domestic tourism industry so far has begun to show signs of development, but it is still thought of by many in the country's tourism industry as not being utilised to its fullest potential. There is still plenty of room for improvement. The next chapter, the conclusion, will summarise the information provided so far, and will suggest policy recommendations.

Chapter 5
Conclusion

5.1 Introduction

This chapter aims to pull together the discussions of the previous chapters, specifically the significance of domestic tourism, its global impact, its impact on developing countries in general and on Rwanda in particular, and the various possibilities of creating a sustainable domestic tourism industry in Rwanda.

Section 5.2 is an overview of domestic tourism on the African continent, and of the Rwandan tourism industry in its efforts to shift from gorilla monoculture and instead to create a new vibrant and diversified industry. This leads to an examination of the various aspects of domestic tourism development in Rwanda and what it will mean for each sector of the country's potential tourist population. Section 5.3 specifies the current situation of Rwanda's rural population and outlines methods to introduce and promote domestic tourism to this segment of the population who cannot afford to travel but can still contribute to the promotion and maintenance of the domestic tourism industry.

Section 5.4 looks at Rwanda's middle-class population and expatriates who are eager to travel and how the country's tourism stakeholders, tour operators in particular, must now take advantage of this enthusiasm. Section 5.5 looks at the most critical aspect of domestic tourism development in Rwanda—the development of a tourism culture. The lack of an understanding of what tourism means to Rwanda and for Rwanda has hindered the citizens of the country from fully embracing, and therefore participating in, Rwanda's tourism industry. Finally, Section 5.6 concludes the research report with final thoughts on the impact of domestic tourism on Rwanda's economy.

5.2 Domestic Tourism in Africa: An Overview

As this research report has shown, it is clear that tourism has contributed to the economic development of several African countries. A recent special report in African

Business magazine states that, despite threats of international terrorism and high aviation fuel costs, recent figures from the United Nations World Tourism Organisation (UNWTO, formerly the WTO) show that “sub-Sahara’s tourism sector is booming. Sub-Saharan Africa recorded the world’s most rapid growth in 2005 while the overall growth of continental tourism was double the global average” (African Business, 2006, p.32). Travel and tourism revenues for the continent were around US$ 73.6 billion of the GDP in 2005, equivalent to 8.8% of the regional economy and up 10% from 2004, double the global rise of 5.5%. Sub-Saharan African tourism provided the most rapid growth of any other region in 2005. In addition, the sector provided 3, 877, 200 jobs directly and 10, 647, 000 jobs indirectly in 2005 or 6.8% of all employment in sub-Saharan Africa. Visitor numbers to the continent were up from 33.3 million in 2004 to 36.7 million in 2005 (African Business, 2006, p.33).

The research has demonstrated that in the world’s poorest countries, with the right policies, tourism in general, and domestic tourism in particular, can be a major export and primary development tool and can contribute significantly to poverty reduction. This is mainly due to its potential to create jobs, socio-economic opportunities, and enhanced quality of life in local communities. Geoffrey Lipman, president of the International Council of Tourism Partners (ICTP) argues that “only properly planned and directed tourism can benefit a national economy as a whole”, having to deliver to local communities, meet sustainability criteria as well as international anti-corruption and fair trade tests (African Business, 2006, p.34). As a job creator in both formal and informal economies, tourism has brought new opportunities to the poorer members of society and created new investment initiatives, contributing to both the social and economic development of the continent. Africa’s main multilateral organisations, including the Economic Commission for Africa (ECA) and the NEPAD, affirm that only if people are part of the process of economic growth in their respective countries, will they truly benefit from this growth. The tourism industry, as recognised by NEPAD, and many individual African countries, is a means to encourage direct participation by the people and offer a sustainable contribution to economic growth. Unfortunately, tourism in several countries has been marked by poor management, a lack of set standards, and poor policy development (Christie and Crompton, 2001). A solution to these constraints is necessary in order to ensure maximum benefits for tourism to continue to impact African economies positively and effectively.

The development of Rwanda's tourism industry is based on an acknowledgement by the government of Rwanda that the industry could play a more significant role in the rebuilding of the country's economy and on improving the country's international image. Being one of the world's poorest countries and emerging from the devastating effects of the 1990-1994 war and genocide, Rwanda stands to benefit from a boost in the tourism industry which will contribute significantly to poverty alleviation through job creation and in turn lead to higher standards of living. Currently, the country's over-dependency on agriculture does not bode well for economic stability. A diversified economy is more likely to be sustainable and to provide a greater chance to achieve poverty alleviation goals in the country, a top priority for the government.

As discussed earlier, for years, Rwanda's tourism industry concentrated mainly on gorilla tourism, which is still the country's most popular tourist attraction. More recently, however, Rwanda's tourism industry has had to develop a new strategy outlining a more diversified tourism experience for potential tourists. The country's small size and the fact that few people know Rwanda, except for its 1990-1994 tragic events, were among the major hindrances faced by Rwanda's Tourism Working Group (TWG) in its attempt to rebuild the industry. The group, however, is managing to turn these hindrances into benefits. The limited knowledge of Rwanda as a country and more so, as a tourist destination meant that the industry could start afresh by promoting itself through offering unique experiences directed to specific types of clientele. This strategy has been working thus far through the initiatives of ORTPN, the country's main tourism office, and through strong support from the government and private sector.

For a country like Rwanda with limited economic resources, however, these efforts must be extended to move beyond international tourism and include domestic tourism. As this research report has shown, a strong domestic tourism industry provides a country with a more dynamic and diverse base, protecting it from any unforeseen developments that could threaten to keep international tourists away from the country. Rwanda faces many such threats, including political instability along the country's borders and infrastructural issues that threaten to slow down the growth of the industry. Developing a domestic tourism industry would serve to mitigate many of these threats and also create a new market that can significantly contribute to the country's tourism economy.

5.3 Promoting Domestic Tourism among Rwanda's Disadvantaged Population

Although a successful tourism industry in Rwanda was once thought to be impossible to achieve, but recent developments point to many opportunities for the industry. The 1994 war and genocide destroyed the entire country's fabric, leaving it with essentially no human capital and without the infrastructure or resources needed to rebuild not just an industry, but an entire country. These tragic events notwithstanding, the accomplishments of the government in the past 12 years of the post-war, post-genocide period have been significant. Nevertheless, due to poverty, the majority of the population is still focused on daily survival, such that anything beyond survival is but a luxury they may well not afford. This explains why the majority of the local population stay within secure and familiar confines; most are employed within the agricultural industry, earning negligible incomes and leading poor lifestyles. Those who may be ill-equipped to alter their lifestyles and have few options when it comes to how they live their daily lives need to be informed about alternative forms of employment that could accrue from improved domestic tourism. In addition, they need to be made aware of what the current economic and social changes in Rwanda will mean for them, especially as they would likely be able to enjoy the benefits that come from these changes, and feel like they are contributing to the growth of the economy. The tourism industry, in general and domestic tourism in particular, can offer these opportunities.

Over the past decade the Rwandan government has sought to ensure security and stability in the country. Nevertheless, while the tourism industry has grown considerably, unfortunately, the importance of the industry is yet to be fully grasped by the general population. Many Rwandans are not fully aware of how they can benefit from the industry and, therefore, do not appreciate its potential. The tourism sector must thus target the local populations and encourage greater awareness of its potential. Since tourism features strongly in the national plan to rebuild the economy, the Rwandan population must be made to feel a part of this process and to understand how they can participate in it. As Kacou (2005) states, "the promotion of domestic tourism should be about creating a culture of tourism, creating jobs, making people want to protect and retain the industry's assets, including ensuring the survival of the national parks, and making people feel they want to work in the industry."

The critical contribution of the tourism industry to job creation and the fact that jobs in the industry range from informal trade and sales to formal employment in tourism-related businesses, means that an increasing share of Rwanda's population has the potential to secure employment in the industry. Over the past few years the GoR has been working towards diversification of the economy, which would mean more options for Rwandans in terms of employment and creation of a more stable economy. Rwanda has just over 8 million people and is a country whose rural population makes up 83.1% of the entire population. The majority of the population—88.6%—survives on the basis of subsistence agriculture, with the rest of the country employed as follows:

- 3.3% of the population works in the service industry;
- 3.1% as unskilled labourers;
- 2.6% in businesses and as traders;
- 1.6% as professionals and "assimilated associates", and
- 0.8% in the manufacturing industry

(Rwanda Development Gateway, 2005)

The over-reliance on agriculture means that diversification is necessary. New industries, both formal and informal, need to be created so that Rwandans can seek out more opportunities for employment as well as for investment. Selling traditional crafts and artwork at the country's main tourist sites is an initiative many Rwandans have been encouraged to take upon themselves. Other potential activities, mostly based on local communities and built around cultural heritage, include historical sites, traditional dance and poetry performances, basket-weaving projects and so on. Such cultural opportunities can contribute to the economic and social development of local communities. Taken as tools for poverty reduction purposes, these could be incorporated into tourism policies and specific programmes and projects whose central goal is the alleviation of poverty. The rural population can benefit from this type of work, especially as most of Rwanda's main tourism sites are located in rural areas. The promotion of domestic tourism, particularly as regards information dissemination, would help the local population better understand the role that tourism can play in their communities and the benefits this would bring to bear on their daily lives. The creation of community-run kiosks and stalls which sell crafts and 'double' as information centres for

tourists is a welcome initiative that has been proposed by ORTPN, albeit has yet to be implemented.

Formal employment in the tourism industry includes jobs in the hotel industry, in restaurants, tour guide operations, and within the transport industry. Unfortunately, lack of trained personnel and of proper training institutions are major constraints upon the industry. In addition, as Birori (2005) emphasises, many Rwandans do not appreciate 'employment' within the tourism industry. Rather, there exists a perception among a few Rwandans that employment in this sector is of low value compared to other seemingly prestigious service sectors such as banking. This attitude, according to Birori (2005), is part of the reason why tourism training institutions in Kigali have failed to take off. Part of the development and promotion of domestic tourism in the country must include capacity building for the industry, and eradicating the belief that employment within the tourism industry is a negative thing and beneath the standards of many. The population needs to be fully sensitised to what the job market within the tourism industry entails, including remuneration and other incentives, such as gratuities if a job is well done. The local people need to be aware and appreciate that well-trained and satisfied employees can greatly contribute to the stability and viability of the industry and therefore to the well-being of the community. The general lack of interest in the tourism industry is also reflected in past trends which have indicated that encouraging employment in the tourism industry has also been a low priority for both government and the private sector. Yet domestic tourism promotion by both sectors could generate more of an interest in tourism as a whole and create a new generation of workers in the industry, those who could potentially invest in new tourism initiatives in the future.

5.4 Promoting Domestic Tourism for Rwanda's Middle-Class

The gap within Rwanda's population between what is often considered low- vs. middle-class is very wide. Consistent data on the exact percentages of the population that fall into each category is unavailable. Introducing these diverse groups to the benefits of tourism, therefore, requires specific approaches for each group. As has been previously discussed, on the one hand, there are those Rwandans who cannot afford to travel, but need to know how to support domestic tourism through seeking employment in the

industry and utilising their skills as artisans and craftspeople to build a strong local tourism industry as well as develop a strong tourism culture. On the other hand, there are Rwandans and those foreigners residing in Rwanda who can afford to travel, but lack the critical information that would enable them to do so. Expatriates, in particular, who are accustomed to travel when they visit a new location as well as those who have friends and family visiting, need to be provided with all information necessary to enable them to explore all that Rwanda has to offer.

Currently, many of Rwanda's main tourist sites still require some infrastructural adjustments including the betterment of main roads; putting in place reasonably comfortable, affordable, and adequate accommodation at or near the main tourist sites; proper information dissemination, as well as the creation of a variety of activities at the specific sites. Through its *Vision 2020* report, it is clear that government is committed to building a strong tourism industry. Its envisaged support to develop these needs is, therefore, expected to make it easier in the long run to promote domestic tourism by making the country's hidden treasures, including Rwanda's magnificent geographical and climatic diversity, inviting enough to potential and real domestic tourists. At present, domestic tourism is still in its formative stages. What is critical at this stage is for Rwanda to sell its tourism products well, through promotion of tourism experiences and activities exclusive and unique to Rwanda and targeting expatriates as well as to foreigners residing in Rwanda. These can easily be reached through their embassies, embassy newsletters, or at hotels.

Although the marketing and promotion initiatives by ORTPN as well as by the private sector targeting the local population have generated a measure of awareness and interest in domestic tourism (particularly among the middle class) a follow-up to these initiatives is still lacking. Several methods have been utilised by the tourism industry during specific events, encouraging Rwandans to take note and participate in the country's tourism initiatives. These efforts have been successful and have forced Rwandans to take notice of the progress of tourism in the country. Nevertheless, Rwandans need to fully understand the importance of tourism so that they are able to understand the needs of the tourists who come to Rwanda (Rwigamba, 2005). While these programmes have been associated with events and functions, the same methods may be used to promote domestic tourism and to encourage more frequent local travel.

With the rich diversity Rwanda has to offer, if each specific tourist destination was to celebrate its cultural traditions and heritage each showcasing its own characteristics, customs, and values, it would draw the attention of both local and international tourists alike.

Several members of Rwanda's tourism industry are in agreement that many tour operators do not believe that local tourists are a viable segment. They have yet to get into "the business of domestic tourism" by promoting experiences to the local market (Kacou, 2005; Birori, 2005). This attitude must change in order for locals to gain the opportunity and an appreciation for travel. Birori (2005), one of Rwanda's leading tour operators, suggests a more aggressive approach to changing such attitudes. He argues that information should be disseminated to tourists through discussion programmes aired on the national television station (TVR) and on radio (especially since mass households in Rwanda own a radio) where members of the tourism industry can be invited to discuss various topics that include new experiences Rwanda can offer, targeting members of the population who can call in to ask questions. Brochures and information packages by tour operators specifically for the local population have also been suggested but not yet executed. Promoting tourism through existing and new experiences specifically for locals, monthly updates on Rwanda's tourism initiatives and offers or competitions conducted at national events or over the radio could provide more of an incentive for Rwandans to travel. Essay competitions in schools based on tourism in Rwanda would also be another way of reaching the youth.

Birori (2005) believes that a build up of interest can entice tour operators to invest more in the tourism segment while Kacou (2005) suggests that creating domestic tourism packages for potential tourists would be an appropriate initiative by Rwandan tour operators to interest more people in the sector. Indeed, the tour operating industry must take responsibility for the sustainability of the industry by continually coming up with promotional packages and new initiatives as part of the quality service expected by tourists in order for the industry to remain competitive. All-inclusive packages for Rwandans living in Rwanda, for members of Rwanda's Diaspora, and expatriates living in Rwanda would encourage many domestic tourists who would like to travel but do not know where to go, how to find transport to their destinations, and how to locate the best accommodation for their price range. Fortunately, most of the middle class population do

believe that there is something to be earned from participating in the promotion of domestic tourism and especially are encouraged by the fact that the strengthening of domestic tourism will help sustain the industry during off-peak seasons. Part of the promotion of domestic tourism includes encouraging Rwandans to market Rwanda amongst themselves and to potential visitors. This is why it also becomes important for the promotion of tourism in general to target Rwanda's Diaspora and encourage them to speak about and promote Rwanda tourism wherever they go. The participation of Rwandans in promoting their tourism industry develops a sense of pride in the country. Tourists who encounter people who are very proud of their country are often encouraged to visit and travel within that country (Rwigamba, 2005).

The more Rwandans know about what the country has to offer, the more those who can afford are able to enjoy what they have, the more the demand will grow. An increase in demand from domestic tourists could potentially encourage the government to move faster in the development of these specific projects, and tourism stakeholders will need to satisfy this demand. Kacou (2005) recommends that there should be 3-4 tourism-related events per year for the local population in different parts of the country and that these should be coordinated by the government through ORTPN, and by the private sector. Such initiatives would force tour operators and other members of the industry to package tours, talk to locals, and create new and 'unforgettable' experiences to expand the importance of the industry to Rwanda.

5.5 Developing a Tourism Culture in Rwanda

For the long-term success of Rwanda's tourism industry, Inamahoro (2005) feels that in order to develop domestic tourism and encourage participation by a population that is not used to travel, the industry must focus on reduced costs and increased accessibility to key sites. Making travel easier among Rwandans will serve to encourage tourism in the country. Although, accessibility to tourism products must be improved, of equal importance is that a tourism culture must be developed in Rwanda. This should include a declaration by both the government and the private sector that tourism is for all Rwandans and the success of the industry can be contributed to by all Rwandans. The

above suggestions as to how to promote and develop a sustainable tourism industry will not be effective if Rwandans do not fully develop a culture of travel and tourism.

As observed in the Chapter four, many Rwandans who can afford to travel still do not consider it a valuable exercise. Travel within the country for a long weekend, or over the holidays is still a 'foreign concept'. Many young, single Rwandans who can afford to travel every once in a while tend to cross the border into Uganda to spend the weekend in Kampala, a city which they find more exciting. The culture of eating out, be it during the week or the weekend, has also been relatively new to Rwandans who find this to be a luxury. Over the past few years, Kigali city has seen the emergence of a number of Chinese restaurants, a few Indian restaurants, an Italian restaurant, a Greek restaurant, an Ethiopian restaurant and many restaurants offering local and foreign cuisines. These restaurants cater mainly to expatriates and to Rwandans returning from the Diaspora who are more accustomed to dining out. Nonetheless as there are more choices of restaurants to go to, an increasing number of Rwandans in Kigali have begun to appreciate the activity of eating out with family, friends, or colleagues.

As mentioned earlier, the culture of tourism has not always been appreciated by the majority of Rwandans; the concept was alien, and in some cases, an impediment. In order to help create this culture, the government must address critical issues that are preventing the majority of the population from fully supporting and engaging in tourism. For example, there are certain land issues that are currently not popular with local farmers. The land used for Rwanda's National Parks has been designated by government as a "protected area" and cannot be used for agricultural purposes. Rwanda is one of the most densely populated countries on the continent and land is very scarce. Whatever little there is, people need it for their subsistence activities (Kacou, 2005) so the idea of the preservation of National Parks that cut into their potential grazing or agricultural areas is not a popular move with the local population who, out of necessity, would not easily support such tourism activities. It has actually been a source of controversy for many, particularly in rural areas. This issue of land allocation and distribution must, therefore, be addressed and resolved by government if the tourism industry is to flourish in the long-term.

The issue of revenue-sharing initiatives, started by ORTPN, must also be put in place and be seen to be effective. ORTPN is seeking to build lodges around the parks that will be managed by the communities. More details are required before this project can be launched, but when it does, it will go a long way to helping local communities better understand and benefit from tourism. Finally, domestic tourism packages must be properly established and prices set for domestic tourists around the country.

Sustainability can be achieved not only through tourism promotion and therefore participation by locals as tourists, but also through investments in the industry as well. Part of the development of domestic tourism in Rwanda also includes the promotion of investment initiatives in the industry by the local population. As Birori states, investments in both international and domestic tourism need to be increased because any investment that is made will benefit both domestic and international tourism (Birori, 2005). Returning Rwandans, in particular, often have the capital and experience to develop new projects throughout the country, and the tourism industry is a prime industry to invest in, particularly at the country's main tourism sites that lack accommodation facilities or leisure activities.

Currently, many Rwandans cannot afford some of the hotels that are targeted mainly to international tourists. Those that are affordable to Rwandans may not be in good condition or have poor service. Rwigamba (2005) suggests that if a tourism culture and a spending culture exist, then the service industry will improve. Local restaurant-goers and those who stay in Rwanda's hotels can develop an understanding of what is expected in the service industry and can encourage local staff to meet those needs by demanding proper service from them. This in turn, will prepare local staff for foreign tourists who are used to such service. Indeed, Birori (2005) suggests that investors could begin to develop well-run, attractive, and affordable hotels targeting domestic tourists, encouraging them to visit these sites more often throughout the year.

Investments need to be made not only in accommodation, but also in transportation, in hotel management, and in tourism training institutions. Muzira (2005) feels the biggest investment that can be made is image-building within the country. A strong public relations firm to build or encourage a positive attitude towards tourism and a sense of confidence and security among Rwandans would be a welcome start. In order for

Rwandans to believe in their tourism industry, they must also believe in their abilities to sustain such an industry. A tourism industry that encourages the participation of all members of the host country's society is a successful tourism industry. Whether the participation is demonstrated through travel within the country, through investments made by nationals, or through employment in jobs created by tourism, the creation of a domestic tourism industry offers the prospect of a stronger economy and a more sustainable industry overall.

5.6 Conclusion

Domestic tourism for Rwanda is critical economically, socially, and politically. The tourism industry is one of the world's most significant job creators. Economically, the impact of a thriving domestic tourism industry for Rwanda, a poor developing country attempting to diversify its economy from subsistence farming to a service-led economy, would be very significant. Developing a tourism culture in Rwanda that allows for regular travel by domestic tourists would mean a boost to both the informal tourism economy, through the sale of local goods and services, as well as to the formal tourism economy through site-visits and stays at the country's lodges and hotels. Socially, the development of a tourism culture in Rwanda would open 'new worlds' to Rwandans through new and exciting experiences and interactions with foreign as well as local tourists they encounter. In addition, the growth of a tourism culture would offer new avenues for friends and family to enjoy holidays and socialise in ways that were not considered or appreciated before. Politically, as Kacou (2005) suggests, the development of domestic tourism would hopefully bring Rwandans together in their shared experiences of the beauty and uniqueness of their country, a country in which they can have a common pride, something they can enjoy because it would be something they have worked hard together to build. In the wake of the country's recent tragic history, the domestic tourism industry in Rwanda could accentuate the values of unity and reconciliation, one of the priority programmes government has been emphasising since 1994. By encouraging all Rwandans to travel their country and embrace the fact that they are tied together by 'one culture, one language, and one country', it is hoped by many in the tourism industry that local people will gain an

appreciation for the entire country and gain a sense of pride in being Rwandan above all else. Without a doubt, the love of a nation is the fastest route towards its development.

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