

Perceived and projected images of Rwanda: visitor and international tour operator perspectives

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Abstract

The present study was conducted with the purpose of determining and comparing the images of Rwanda as a tourist destination as perceived by visitors and as projected by international tour operators. The employed instruments consisted of two independent, but in their main parts, identical questionnaire surveys that featured both structured and unstructured methods in order to capture the various components of the image construct. The study identified several important differences between the perceptions of visitors and tour operators, thereby indicating that the latter project inadequate or even negative images of the country. The three main discrepancies appeared to be the evaluation of the current safety situation, opinions about the range of activities offered, and views concerning the value of visitors' encounters with the local people at the destination. The results offered valuable policy implications for future marketing strategies in Rwanda.

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1. Introduction

Despite its various potential negative impacts, tourism has been identified as one of the few viable economic opportunities in large parts of the least developed world. Among the major impediments for increased tourist activity in such regions is the limited destination knowledge of visitors and the perceived negative image provoked by political instability, poverty and recent tragic events and humanitarian conditions. Image studies have thus been found to be of precious value to national tourism authorities, who can use the findings to improve their marketing strategies.

Rwanda in Central Africa is a case in point. It is recognised for its poor living conditions, its violent past, and its location in a politically unstable region. Peace has still not been achieved in the neighbouring Democratic Republic of Congo and Burundi, and a terrorism threat was recently announced for Tanzania

and nearby Kenya. Most importantly, for the last decade the country was “almost exclusively associated with the genocide” (Briggs & Booth, 2001, p. vii) involving the brutal killing of almost one million Rwandans by the hands of fellow countrymen in an orchestrated civil war that took place in 1994.

Market research conducted in neighbouring countries in early 2002 by the US-based consulting firm ontheFRONTIER, was a strong reminder of the importance of a positive destination image. The survey findings suggested that 53% of participating international visitors ($n = 225$) had either never heard of or knew little about Rwanda, and 52% believed that it was an unsafe destination, leading to the statement that they were “somewhat reluctant to take a trip to the country” (ontheFRONTIER, 2002, p. 6). Furthermore, they perceived Rwanda as being a lesser-quality destination than its direct East African competitors, Kenya, Tanzania and Uganda.

These results were surprising to those responsible for tourism marketing in Rwanda. It became clear that the prevalent image problem needs to be overcome if

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tourism is to play a key role in the future development of the country, as was suggested in Rwanda's Vision 2020 (The Government of Rwanda, 2001, 2002). The present image study therefore aimed at providing the empirical background for future marketing efforts. Its objectives were to examine the images perceived by international visitors to the country and those projected by international tour operators featuring or intending to feature it. The results of the two images were then compared in order to draw conclusions for future marketing strategies.

2. Destination image

Since the first studies were conducted three decades ago (e.g., Hunt, 1975), destination image has been identified as critical for the success of an area's tourist development, and has become the pivotal aspect of a destination's marketing strategy (Chon, 1990; Echtner & Ritchie, 1991; Ferreira & Harmse, 2000; Gallarza, Saura, & Garcia, 2002). Although researchers record a growing body of literature on destination image (Pike, 2002), various shortcomings have been noted.

First of all, the term 'image' imposes a definition problem. While Bignon, Hammit, and Norman (1998) assumed that, depending on the researcher's viewpoint, image has many definitions, Echtner and Ritchie (1991) lamented that in many studies precise definitions are avoided or not explicitly stated. Secondly, most of the studies concentrate on only a few countries as well as states and regions in the United States, neglecting most emerging tourist destinations in developing countries (Sönmez & Sirakaya, 2002). And, thirdly, apart from a few exceptions (e.g., Echtner & Ritchie, 1991, 1993), studies have been criticized as "atheoretical and lacking in any conceptual framework" (Fakeye & Crompton, 1991, p. 10).

2.1. Methodologies of measuring destination image

Various methodologies of measuring destination image have been developed over the past 30 years, most of which consist of either a structured, quantitative approach or, less frequently, an unstructured, qualitative approach (Pike, 2002). Studies employing structured methods usually measure the various common image attributes through a set of semantic differential or Likert scales, thereby producing ratings on each attribute. Examples for this concept are the studies of Hunt (1975) concerning four US states, Shanka and Frost (1999) concerning Ethiopia, Andreu, Bigne, and Cooper (2000) concerning Spain, Chaudhary (2000) concerning India, and Sönmez and Sirakaya (2002) concerning Turkey. Whilst structured approaches have the advantages that attribute lists are easy to administer, produce

data that can be easily coded and analysed, and facilitate comparison of several products (Echtner & Ritchie, 1991), they offer little opportunity to capture "the full dynamics or richness inherent in the process of destination choice" (Dann, 1996, p. 42), thereby potentially reducing the completeness of the measurement.

The rarely used alternatives to structured approaches are unstructured, qualitative methods of measurement such as focus groups or open-ended survey questions with content analysis and various sorting techniques, employing free form descriptions to capture the more holistic components of the image (Echtner & Ritchie, 1991). Among others, such methodologies were developed by Dann (1996), examining linguistic expressions of visitors to Barbados, and by Kelly (1998), comparing photographs from various sources with oriental paintings and analysing textual themes concerning Jordan. While it is acknowledged that these methods are more conducive to measuring the richness of the image (Baloglu & Mangalolu, 2001), they are criticised as only offering limited possibilities for statistical analysis and, therefore, are subject to more interpretational bias (Murphy, 1999) as well as depending upon either available data sources or the skills, willingness and knowledge of responding individuals (Echtner & Ritchie, 1991).

Trying to address the shortcomings of both approaches, Echtner and Ritchie (1991, 1993) developed a comprehensive concept of the destination image that was largely adopted for this study. According to them, destination image needs to be measured by a three-dimensional model featuring the three continuums attribute–holistic, functional–psychological and common–unique. They concluded:

[D]estination image is defined as not only the perceptions of individual destination attributes but also the holistic impression made by the destination. Destination image consists of functional characteristics, concerning the more tangible aspects of the destination, and psychological characteristics, concerning the more intangible aspects. Furthermore, destination image can be arranged on a continuum ranging from traits which can be commonly used to compare all destinations to those which are unique to very few destinations (Echtner & Ritchie, 1991, p. 8).

An operationalisation of this concept resulted in the combination of structured and unstructured methods, using a list of 35 attributes and three open-ended questions in order to capture the richness of the image according to all three continuums. Further studies that employed or adapted Echtner and Ritchie's (1991, 1993) approach include Choi, Andrew, and Janice's (1999) research on Hong Kong, Murphy's (1999) study on Australia, and Baloglu and Mangalolu's (2001)

comparison of four Mediterranean countries. All of them confirmed that Echtner and Ritchie (1991, 1993) had successfully developed a conceptual framework that managed “to identify ‘true’ images of tourist destinations” (Baloglu & Mangalolu, 2001, p. 7).

2.2. *Samples of image studies*

The targeted samples for the studies vary according to the goals of the researcher. Bignon et al. (1998) and Sönmez and Sirakaya (2002), for example, surveyed individuals who were either experienced or interested in international travel in general, but had not necessarily been to the study destination before. Frequently, however, samples feature visitors who have been to the destination at least once in order to determine the perceived image of that place (Dann, 1996; Brown, 1998; Choi et al., 1999; Murphy, 1999). In this context, Schneider and Sönmez (1999, p. 539) concluded that “investigating and attending to current tourists provides a baseline of information from which to build and tailor marketing and service promotions”.

In contrast to the above studies that mainly focused on the perceived image of a destination, other researchers have tried to capture the projected image. Andreu et al. (2000) identified travel intermediaries as major protagonists who transmit information to potential tourists and, thereby, influence the images and decisions of travellers. Tour operators, in particular, tailor destination images in accordance with what they think will sell to their customers (Willis, 2001). They do not necessarily respect the accuracy or reality of those images (Santos, 1998), although it is not always clear whether this is intentional, careless or out of ignorance due to a lack of local and up-to-date knowledge. Studies aimed at determining the projected image more often than not deal with travel intermediaries that feature or intend to feature the destination (Pirie, 1995; Santos, 1998; Gle, 1999; Okore, 1999; Tema, 1999; Baloglu & Mangalolu, 2001) or are interested in the destination (Dimanche & Moody, 1998).

Andreu et al. (2000) further suggested examining the relationship between the two concepts of perceived and projected image. They compared perceptions of two different segments of individuals interested in undertaking travel to a destination, namely those who had already been to the destination and those who had had no personal experience to-date. Their findings suggest that differences exist between the perceptions of the two samples. Unfortunately, this approach does not seem convincing in terms of studying both the perceived and, especially, the projected image. In particular, those visitors with no personal experience might have been exposed to a number of different information sources and, therefore, are not representative for the identified protagonists of projected image. Similar and slightly

more convincing studies have been carried out by Chaudhary (2000) and Willis (2001) who compared expectation with satisfaction levels of visitors by collecting pre- and post-trip data. The relevance of such an approach had already been identified in previous studies (Chon, 1990; Echtner & Ritchie, 1991; Bramwell, 1998). Akama and Kieti (2003) concluded that this strategy offers a good opportunity to compare the image projected by various information sources with the image gained by visitors at the destination.

Acknowledging the aforementioned, it is surprising that no study could be found that aimed at directly comparing the image perceived by visitors to the destination with the image projected by tour operators. The current research seeks to overcome this shortcoming.

3. Rwanda and tourism

In the Lonely Planet Guidebook for East Africa, Rwanda is described as a “beautiful yet brutalised country” (Finlay, Fitzpatrick, Fletcher, & Ray, 2000, p. 617). Any introduction in the context of tourism therefore needs to deal with both the tragic historical events, as well as the current situation of the political economy and developments in the tourism sector.

3.1. *History*

At the time of the arrival of the first Germans and later Belgians, the majority Hutus and the dominant minority Tutsis shared the same language, religious practices and culture. Out of a belief that their rule would be easier in a racially divided class society, the colonisers reemphasised the initial differences between the two main races. Since Rwanda gained its independence in 1962, “tensions among the ethnic groups deepened into ever-worsening conflict” (Oxfam, undated: Internet). This racial trouble culminated in the worst acts of genocide since the Holocaust. Starting on the 7th April 1994, Hutu military and militia groups, joined by incited furious ordinary citizens, carried out the pre-planned rounding up and killing of an estimated 800,000 Tutsis and moderate Hutus. It could only be stopped by the invasion of the Tutsi exile rebel group ‘Rwandan Patriotic Front’ (RPF) that subsequently took over government control. Possible explanations for these incomprehensible atrocities are manifold—Magnarella (2001) and Pottier (2002) provide good summaries.

Now, a decade after the genocide, poverty and lack of human development is seen by many as the major threat on the road to lasting peace and continued sustainable development (Gahururu, 1997; Kayizzi-Mugerwa, 2000; Mackenzie, 2003; Mutebi, Stone, &

Thin, 2003). Nevertheless, Rwanda can tell an incredible success story, which is probably best described in the words of Clare Short, the former British Secretary for International Development (quoted in *The New Times*, 2003, p. 4):

I think when you think about 1994 and the terrible suffering and loss of life and destruction of all institutions of the country and the economy, and the fact that the people responsible for the genocide went out into the Congo and have been determined to come back and try to destabilise the country once again; and the levels of poverty and suffering, it is a miracle that Rwanda has managed to achieve what it has achieved.

3.2. *Political economy and tourism*

Although economic progress since 1994 has been significant with a growth rate of 10% in 2002, Rwanda is one of the poorest countries in the world with a 2002 per capita GDP of 210 US\$ (UNCTAD, 2004). The country suffers from environmental problems and an “abject poverty from which there is no obvious means of escape” (Waller, 1987, p. 3), at least for the 59% of the population of 8.1 million who live below the poverty line. With only few natural resources to exploit, the Rwandan economy is almost entirely based on agricultural production of small, semi-subsistence and increasingly fragmented farms. Agriculture contributes 91% of employment, 41% of GDP and 72% of exports. Additional export products consist of coffee and tea, and a slowly increasing variety of fruits, potatoes and cut flowers (The Government of Rwanda, 2001).

Before the genocide, tourism has been the third largest earner of foreign exchange, making a substantial contribution to GDP, providing significant employment and generating funds for conservation programmes (Shackley, 1995). Although tourist arrivals have dropped considerably from 40,000 in 1990 to only about 8000 in 2002, tourism planners appear to be very optimistic for the future. After an evaluation of Rwanda’s tourism potential, tourism consultants concluded that an investment of about \$100 million during the next 8 years could increase the arrival figures to almost 80,000 by 2010. They particularly emphasise targeting a market of ecotourists, explorers and individual business travellers (Katarebe, 2002; Stratte-Mc Clure, 2003).

This optimism results from Rwanda’s increasingly diversified attractions. Its natural environment is highly varied with grassy up-lands and literally a thousand hills, five volcanoes, more than 20 lakes including the large inland sea Lake Kivu, and plains and swamps in the eastern border region. About 10% of Rwanda’s area is protected within three very distinct National Parks.

The undisputed highlight to most travellers is a visit to the largely untouched bamboo forests of Volcanoes National Park, where an estimated 350 of the last remaining 650 mountain gorillas continue a threatened existence. Nyungwe National Park, a giant virgin rainforest, and Akagera National Park, a more or less typical East African savannah park, complement a great ecotourist’s experience (Kanyamibwa, 1998; Lyambabaje, 2002).

Apart from ecotourism, the Rwandan Office of Tourism and National Parks (ORTPN) recently introduced a culture tour featuring a chronological journey across the country and 500 years of its history. Furthermore, small community-based projects, particularly near Volcanoes National Park, have started to attract growing numbers of individual travellers and explorers interested in an authentic Central African experience (Grosspietsch, 2004).

4. Methodology

Two separate questionnaire surveys were conducted in June and July 2003 in order to determine the images perceived by visitors and projected by tour operators. The first sample consisted of those visitors who were non-Rwandan nationals, and were either waiting to board their flight at Kigali’s international airport or had just finished their visit to Volcanoes National Park. Data were collected through a questionnaire (available in English, French and German) administered together with a covering letter either by the researcher or the National Park staff, or offered in a non-personal way with a collection box in the airport’s departure lounge. After 23 unusable questionnaires had been filtered out, 508 were retained for data analysis. The question whether the sample was representative was difficult to answer because detailed national arrival figures as well as potential comparable figures from previous years were not available. The only possible analysis was a comparison with visitor figures from Volcanoes National Park for the same period of time. The results indicated that the sample was representative. Still, some doubts remain because it is highly probable that certain neighbouring countries are among the principal non-Rwandan markets but that their nationals are not very excited about a gorilla trip.

The second sample consisted of those international tour operators who already featured or planned to feature Rwanda in the near future. After establishing contact through an introductory email, data were collected through a questionnaire (available in English and French) administered via email. Out of 167 contacted tour operators, 65 responded to the introductory email with indications of a contact person and their products, and 43 returned the completed survey

after a maximum of two follow-up emails. One questionnaire was unusable, but 42 were kept for data analysis, yielding a response ratio of 25%.

Identical in their main parts, both questionnaires were based on previous research, the content of the brochure of the ORTPN and a conversation with the national Director of Tourism Development. The first part was adapted from the approach developed by *Echtner and Ritchie (1991, 1993)* as it comprised both structured and unstructured components. Respondents were asked to rate a list of 15 attributes, reflecting the three identified continuums, according to their satisfaction on a 5-point Likert scale from 1 (very dissatisfied) to 5 (very satisfied). Additionally, three open-ended questions aimed at examining the more holistic and unique elements of the destination image. Respondents were asked:

- What three images/characteristics come to mind when you think of Rwanda as a tourist destination?
- Please describe the atmosphere/mood that you have experienced in Rwanda.
- Please list any distinctive/unique tourist attractions that you can think of in Rwanda.

In a second part, respondents were asked to indicate their level of agreement concerning nine pre-developed statements on Rwanda on a 5-point Likert scale from 1 (strongly disagree) to 5 (strongly agree). The visitor survey featured these statements under the heading “What would you tell your friends about Rwanda?”, while the question “What do you believe your clients would tell their friends about Rwanda?” was the heading in the tour operator survey. Additionally, both surveys comprised various questions that targeted socio-demographic data and other valuable information asked for by ORTPN officers who assisted in the research.

The collected data were analysed by employing Microsoft Excel 2002 for summaries and descriptive statistics. To evaluate the three open-ended questions, the various descriptions used by respondents were classified and labelled in order to allow frequency analysis.

5. Results and discussion

5.1. Visitors' profile

The four major tourist-generating countries were the UK, the USA, Germany and France, together representing 54.6% of all visitors. The great majority of respondents were aged below 55 and some 40.9% below 30, with a slight majority of male visitors. In all, 60.1% were on holiday, and almost half of all respondents

came in a group with other visitors. When asked about their travel preferences, 44.2% claimed to be nature tourists and 42.3% to be adventure tourists. Previous travel experience on the African continent was found to be high with almost two-thirds of respondents having been to East Africa before. Similarly, for almost every fifth visitor it was not the first trip to Rwanda. The most important information sources prior to visiting the country were the accounts of friends and relatives as well as travel guide books. A more detailed summary of visitor profiles is presented in *Table 1* below.

5.2. Tour operators' profile

The 42 participating tour operators represented 12 different countries, with the majority being located in the UK, Uganda and the USA. In all, 43.8% indicated that they were specialised in nature tours, while 25.0% specialised in adventure tours, 18.8% focused on the African continent or the sub-region of East Africa in general, and 12.5% offered tours with a special focus on the culture within the destination. Most of their clients travelled with a partner or in a group, and the majority (65.0%) of their tours were tailor-made. A more detailed summary of tour operator profiles is presented in *Table 2* below.

5.3. Image perceived by visitors

The image perceived by visitors was determined through a list of 15 attributes, three open-ended questions and a list of nine pre-developed statements. The major issues were safety, natural attractions, cultural attractions including the life of the local people, and feelings about the destination.

Safety is among the top concerns of every tourist destination, especially if it is burdened with a history of political instability. The respondents gave a clear message on this issue. On average, their satisfaction level for safety and stability was 4.27 on a 5-point scale. Asked about the specific national context, the average visitor agreed with the statements that ‘ethnic and social tensions are not perceptible (any more)’ and that the people ‘have learned a lot from the recent past’ (3.66 and 3.71 on the 5-point scale, respectively). Answers to the open-ended questions provided a similar picture. Among the images and characteristics that came to mind when they thought about the country, only 6.2% referred to current political problems and 4.5% revealed other adverse effects, such as poverty or begging children. In 90.7% of all responses describing the atmosphere or mood experienced within the country, visitors mentioned a generally pleasant, peaceful and welcoming ambience. Only the remaining 9.3% indicated that they were confronted with tense or

Table 1
Visitors' profile ($n = 508$)

Demographic characteristic	Frequency	Percentage
Country of origin		
UK	106	20.9
USA	82	16.1
Germany	47	9.3
France	42	8.3
Netherlands	32	6.3
Australia	27	5.3
Belgium	27	5.3
New Zealand	22	4.3
Canada	19	3.7
Other	104	20.5
Age		
< 30	206	40.9
30–55	237	47
> 55	61	12.1
Gender		
Male	267	53.3
Female	234	46.7
Main purpose for visit		
Holiday	301	60.1
Business	100	20
Visit to friends/family	74	14.8
Other	26	5.2
How did they travel		
Group	234	47.1
Single	121	24.3
Partner	94	18.9
Family	48	9.7
Visitor motivations (multiple responses possible)		
Nature tourist	225	44.2
Adventure tourist	215	42.3
Recreational tourist	146	28.7
Culture tourist	95	18.7
Previous travel experience in Africa (multiple responses possible)		
East Africa	322	63.4
Southern Africa	193	38
Other Africa	216	42.5
Rwanda	97	19.1
Most important information source		
Friends, relatives, etc.	177	36.9
Travel guide books	91	19
Brochures from TO	70	14.6
Business contacts	53	11
Internet	45	9.4
Media	39	8.1
Official ORTPN brochure	5	1

contradictory situations that caused a negative impression. The great majority of respondents therefore perceived the destination as safe and saw no impediments arising from political instability.

The natural attractions were most often regarded as the country's main assets as a tourist destination. Of all responses concerning unique and distinctive tourist

Table 2
Tour operators' profile ($n = 42$)

Demographic characteristic	Frequency	Percentage
Country of origin		
UK	9	21.4
Uganda	9	21.4
USA	7	16.7
Kenya	4	9.5
South Africa	3	7.1
Canada	2	4.8
France	2	4.8
Germany	2	4.8
Belgium	1	2.4
Spain	1	2.4
Switzerland	1	2.4
Tanzania	1	2.4
Area of specialisation (multiple responses possible)		
Nature	28	43.8
Adventure	16	25.0
Africa/East Africa	12	18.8
Culture	8	12.5
How long have you been offering tours to Rwanda		
< 2 years	15	35.7
2–10 years	21	50.0
> 10 years	6	14.3
How do clients travel (multiple responses possible)		
Partner	28	43.8
Group	16	25
Family	12	18.8
Single	8	12.5
Type of tour		
Package		35.0
Tailor-made		65.0

attractions, 88.7% were linked to nature. Similarly, 57.5% of all images and characteristics respondents thought of focused on nature. Not surprisingly, the visit to the mountain gorillas in Volcanoes National Park was seen as the unique selling point (4.73 on the 5-point scale). However, the results also indicated that visitors enjoyed the great diversity of Rwanda's natural environment (3.98), with several mentions of the numerous beautiful lakes, the stunning volcanoes, the giant rainforests of Nyungwe National Park, and the savannah habitat of Akagera National Park. More generally, respondents were very satisfied with the spectacular landscape in the entire country (4.49).

Rwanda's cultural attractiveness as well as its ceremonies/performances and its local handicrafts in particular were secondary to the natural attractions (3.39, 2.99 and 3.26, respectively). Only 11.3% of the unique and distinctive tourist attractions mentioned in the third open-ended question had a focus on culture. However, the picture changes if images of the lifestyles of the local people are included in this section. Respondents were very satisfied with the friendliness

of the local population and their own interaction with the locals (4.11 and 3.78, respectively). Similarly, they agreed that Rwanda provides good opportunities to meet the inhabitants of the towns and villages visited (3.66). Even more convincingly, 22.7% of all images and characteristics thought of by the visitors were linked to the daily life in Rwanda. Respondents particularly mentioned their interest in various traditional activities such as brick making or the cultivating of small plots for farming.

The questions targeting the more psychological elements of the destination image revealed that Rwanda is offering a good African experience (4.06 on the 5-point scale), particularly because it is still quite unknown and unspoiled, as well as exotic and unusual (3.86 and 3.83, respectively). The great majority of respondents (90.7%) talked about a 'wonderful' or 'lovely' time with 'respectful', 'courteous' and 'helpful' people who contributed to an 'adventurous', 'authentic' and generally 'pleasant' experience.

5.4. *Image projected by tour operators*

The image projected by tour operators appears rather gloomy. Respondents were apprehensive with regard to the current political situation. There was a general concern about destination's safety (2.79 on the 5-point scale) and a belief that ethnic and social tensions are still prevalent (2.42). However, whilst they assumed that local people had learned from the tragic recent past (3.03), when asked about the mood and atmosphere within the country 45.3% referred to degrees of tension, uncertainty and anxiety.

The majority of participating tour operators perceived the natural attractions as the only real pull factors of the destination, and frequently referred to the limited range of activities (2.46). The mountain gorillas as well as the spectacular landscape both featured high amongst respondents (4.79 and 4.39, respectively), while most of them were less convinced by the overall diversity of natural attractions (3.21).

Cultural aspects were deemed to be mediocre at best. The general cultural attractiveness as well as the more particular categories of ceremonies/performances and local handicrafts all scored moderate index values (3.11, 2.88 and 2.96, respectively). Similarly, respondents did not value the life of the local people as being of great interest to their clients. Opportunities for interaction appeared to be limited (2.86) and potentially not desirable as local people were not perceived to be overly friendly (3.21). Another indication of this attitude was the fact that only 4.4% of all images and characteristics associated with Rwanda focused on the culture or the life of the local people.

Finally, a potential destination asset appeared to be its exoticness (3.78 on the 5-point scale). However, this

perception was partly clouded since the respondents did not perceive Rwanda to be particularly unknown or unspoiled (3.27) or to be offering a great African experience (3.40).

5.5. *Comparison of the perceived and projected images—implications for marketing*

A tabulation of the images perceived by visitors and projected by tour operators is presented in [Table 3](#) below. It reveals contrasting differences between the two images. The first general observation relates to the fact that index values of both lists (attributes and statements) were almost consistently higher on the side of the visitors. In this context, it needs to be acknowledged that tour operators have, by their very nature, characteristics that are different to those of visitors. On the one hand, they are professionally and legally liable for the advice they give and, on the other hand, their perspective is wider and more objective as they offer a variety of destination packages and make comparisons based on their knowledge and preconceptions of each one. Apart from that, different visitors are affected by numerous different factors such as the purpose of their visit, whether they stay with friends and relatives, the length of their stay, the places that they visited or the contact that they had with local residents.

Several significant differences are, nevertheless, observed. Firstly, there are contradicting statements about perceptions of safety. While visitors were very satisfied (4.27 on the 5-point scale) with the security conditions and almost exclusively experienced a friendly, welcoming and peaceful atmosphere (90.7%), tour operators described the safety and political stability in the country as rather dissatisfying (2.79) and often expected to find a tense and contradictory mood (45.3%). This finding indicates a clear need to educate the tour operators and the general media in tourist-generating countries on recent positive developments at the destination and in the region. Among others, a leading official in a European embassy revealed in a personal communication with the researcher that, at the time of the research, he did not see any serious security threat anywhere in the country.

Secondly, although both visitors and tour operators valued the mountain gorillas and the spectacular landscape as unique natural attractions, the tour operators appeared not to appreciate the diversity of the country's nature as much as the visitors (3.21 compared to 3.98). Tour operators particularly lamented the limited range of activities, indicating a need to improve the marketing of those activities that are currently available, and the need to develop and promote a wider range of attractions. For instance, several visitors mentioned nature activities that the national Director of Tourism

Table 3
Images perceived by visitors and projected by tour operators

List of 15 attributes	Index value (visitors)	Index value (TO)
Safety/stability	4.27	2.79
Spectacular landscape	4.49	4.39
Mountain gorilla tour	4.73	4.79
Other wildlife viewing	3.3	2.65
Cultural attractiveness	3.39	3.11
Ceremonies/performances	2.99	2.88
Local handicrafts	3.26	2.96
Interaction with people	3.78	2.86
Friendliness of people	4.11	3.21
“African” experience	4.06	3.4
Unknown/unspoiled	3.86	3.27
Wide range of activities	3.00	2.46
Good value for money	3.49	3.00
Accommodation	3.53	2.90
Infrastructure (roads)	3.08	3.18
Three open-ended questions	% (visitors)	% (TO)
Images and characteristics		
Natural attractions	57.5	74.4
Interesting culture/life	22.7	4.4
Friendly people	9.1	8.9
Political problems	6.2	8.9
Negative images	4.5	3.3
Mood or atmosphere		
Friendly/welcoming	52.7	22.6
Relaxed/peaceful/pleasant	38	32.1
Tense/contradictory/negative	9.3	45.3
Distinctive/unique attractions		
Mountain gorillas	48.3	41.3
Diverse landscape	17.1	16
Culture/life	11.3	9.3
Lakes	9.2	10.7
Volcanoes	7.2	8
Other nature	7.4	14.7
List of nine statements	Index value (visitors)	Index value (TO)
Rwanda is a safe country.	3.96	2.29
Ethnic and social tensions are not perceptible (any more).	3.66	2.42
The people have learned a lot from the recent past (genocide).	3.71	3.03
Rwanda offers a great diversity of natural attractions.	3.98	3.21
Rwanda offers a great diversity of cultural attractions.	3.32	2.97
Rwanda is exotic and unusual.	3.83	3.78
Rwanda offers a complete “African” experience.	3.57	2.95
Rwanda offers great opportunities to meet local people.	3.66	2.95
Tourism in Rwanda can help to reduce poverty.	4.29	4.37

Development was not (yet) aware of, such as new trekking and water activities.

Finally, the tour operators did not appear to appreciate the cultural attractiveness of the destination and, in particular, the potential encounters of their clients with the local people. Even though it might seem to be unexpected due to the recent tragic past, visitors perceived the local people as extremely friendly and welcoming, offering numerous occasions for valuable personal interaction. Furthermore, visitors showed a strong interest in the traditional lifestyles and thus proved that community-based tourism activities could be a

precious alternative to the future of Rwanda’s tourism. This is even more the case as long as the destination is still regarded as reasonably exotic and unspoiled. Destination marketing professionals as well as tour operators should therefore rethink their current strategies concerning the cultural attractiveness of the country.

6. Conclusions

The comparison of the images perceived by visitors and projected by tour operators showed that Rwanda

has a great catch-up demand for accurate marketing strategies for tourism. The two identified images offered at least partly different perceptions of the same destination, and in all significant parts it was the tour operators who provided a much more negative and gloomy picture. This result is particularly disturbing as it is these tourism professionals upon which a country such as Rwanda depends to attract visitation. If they do not hold a positive perception of a destination themselves, they will not be good sales representatives for it. The study revealed a basic need for further development of diversified tourist attractions, particularly with a focus on the cultural attractiveness. Much more urgent, however, are the actions necessary to counter the lack of knowledge held by tour operators. This implies the need for the distribution of more accurate and up-to-date information about the destination in tourist-generating countries. The study identified several issues as priority for future marketing strategies, particularly aspects of safety, the range of activities offered in the country, the great value of encounters with the local people, and the increasing efforts to develop more community-based tourism offerings.

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