



**An analysis of tourism economic development in the Northern Province of
Rwanda**

By

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DECLARATION

I, Mugisha RURANGWA, declare that the contents of this dissertation represent my own unaided work, and that the dissertation has not previously been submitted for academic examination towards any qualification. Furthermore, it represents my own opinions and not necessarily those of the Cape Peninsula University of Technology.

Signed

Date

ABSTRACT

For many developing countries such as Rwanda, tourism has been viewed as one of the most lucrative industries to diversify the economy, create jobs and enhance the general welfare of people living in dire poverty. This research focused on tourism economic development in the Northern Province of Rwanda. This study also considered documentary and empirical research by examining existing literature. The survey used three types of questionnaires as the data collection method. Questionnaires considered views of tourists in the Northern Province of Rwanda; tourism business owners/managers in the Northern Province, and the Rwanda Development Board/Tourism and Conservation in the Northern Province. Data collected was presented, analysed and interpreted using the Statistical Package for Social Sciences version 18 (SPSS). Findings revealed that tourism does contribute to economic development in the Northern Province. Results reveal that the number of tourists in the Northern Province is increasing; tourism businesses are also increasing thus creating jobs for local people. Rwanda Development Board/Tourism and Conservation in the Northern Province is involved in five projects that promoted job creation and improved the lives of local people in the province. Findings revealed that the Rwanda Development Board/Tourism and Conservation and tourism business employ 75% employees that are originally from the Northern Province. The study further suggests the diversification in tourism products and services, recommends the promotion of domestic tourism and the consumption of local products.

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DEDICATION

To my parents,

For your love, support, encouragement, motivation and inspiration; this dissertation is dedicated to you both.

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GLOSSARY

Abbreviation explanations

B&B	Bed and Breakfast
BC	Before Christ
BCK	Boucherie Charcuterie de Kigali
EAC	East African Community
EU	European Union
F&B	Food and Beverage
FIFA	Fédération Internationale de Football Association
GDP	Gross Domestic Product
HAC	Hotel Association of Canada
IATA	International Air Transport Association
KES	Kenyan shilling
KFC	Kentucky Fried Chicken
KIST	Kigali Institute of Science and Technology
MAD	Moroccan dirham
NATO	North Atlantic Treaty Organisation
NGO	Non-Governmental Organization
NPF	National Patriotic Front
ORTPN	Office Rwandais du Tourisme et des Parcs Nationaux
PPI	Producer Price Index
RDB	Rwanda Development Board
RTTA	Rwanda Tours and Travel Association
RTWG	Rwanda Tourism Working Group
RWF	Rwandan Franc
SADC	South African Development Community
UK	United Kingdom
UNCTAD-ICC:	United Nations Conference on Trade and Development - International Chamber of Commerce
UNDP	United Nations Development Programme
UNWCED	United Nations World Commission on the Environment
UNWTO	United Nations World Tourism Organization
US\$	United States dollars

USA	United States of America
VNP	Volcano National Park
WTO	World Tourism Organization
WTTC	World Travel and Tourism Council
WTT	World Travel and Tourism Council

N.B: Calculations in this study were done at RWF 600 to US\$ 1

CHAPTER ONE BACKGROUND TO THE STUDY

1.1 Introduction

The research seeks to analyze the economic impacts of tourism in the Northern Province of Rwanda as they relate to the development of the region. Tourism in the Northern Province of Rwanda has the potential to be a reliable sector, with expectations that its benefits may contribute not only to the economy of the province but also to the development of Rwanda as a country. For many developing countries, including Rwanda, tourism has been viewed as one of the most lucrative industries to diversify the economy, create jobs and enhance the general welfare of the people living in poverty. Many recorded instances have, however, borne witness to the fact that mass tourism receipts do not necessarily translate to the desired economic development of an underdeveloped country. In addition, a literature review has also shown that the spatial distribution of tourism arrivals is uneven, the distribution of tourism resources is also uneven, and the distribution of tourism income is grossly inequitably. Implications of the above sentiments stress the fact that there have been disappointments in some developing regions of the world on tourism's ability to pull the economy out of the doldrums of underdevelopment and poverty. This research seeks to analyze contributions of tourism to the economic development of the northern region of Rwanda by considering such indicators as infrastructural development, job creation and enhancement of family income.

The Northern Province of Rwanda has natural attractions to host a tourism industry in a sustainable way, which could translate into economic development of the region. Tourism in the Northern Province of Rwanda is mainly centred on the Volcanoes National Park, which covers an area of 12.000 ha of natural forest. There is a variety of fauna, such as buffalo, golden monkeys, and mountain gorillas and flora such as bamboo trees. In addition, there are various other tourist attractions such as the Musanze grottoes, Mukungwa and Mpenge Falls, as well as a pleasant and cool climate with a mountainous landscape (Rwandagateaway.org:2009). This research analyses whether the plethora of tourism resources in the Northern Province can be converted to economic development for the region, and the upliftment of the local populations.

1.2 Tourism, economics and development

Frederick (1993:215) asserts that tourism is a popular economic development strategy. In actual fact, tourism for most underdeveloped regions is often the only readily available option, which

diversifies local economies and creates meaningful development. The economic benefits of tourism are numerous, and include:

- The creation of jobs directly or indirectly. Direct jobs include tourist guiding, travel consultancy, airline and tour operations, and hospitality employment. Jobs are also created in supporting industries and services such as security, food production, and retail business. Tourism has a multiplier effect on the economy and the job market.
- Tourism promotes increased spending on local produce and products since visitors support local businesses.
- Local entrepreneurship is also promoted as residents showcase their various skills and knowledge in fields such as arts and crafts, tourism services such as tourist guiding, retail shops and local market ventures that include street vending.
- Economic diversification is another important positive benefit that is associated with tourism, which offers an additional source of income that ensures local communities against difficult times in instances where traditional industries such as agriculture, fishing or mining fall under distress, and
- Massive infrastructural development is often associated with tourism in both an employment creator and catalyst for future economic prosperity.

The economic benefits of tourism are however, sometimes overstated. Tourism also has some negative impacts. Unplanned tourism could have devastating environmental, cultural and socio-economic consequences. These negative impacts could range from environmental degradation, pollution, increased pressure on local amenities, loss of cultural identity and degradation of heritage and historic sites. In the final analysis Frederick (1993:215) notes that the economic benefits of tourism often come at a cost. Developers and tourism planners should consider the cost benefit analysis of available options to proposed tourism programs that have less negative and more positive economic impacts. For the purpose of this research, the negative economic impacts of tourism are noted as:

- Visitors who came from better economies fuel artificial inflation. Artificial inflation refers to the increase in local prices mainly due to increased demand, without any relation to the costs of production of local goods. The perception that tourists have more disposable income could cause local businesses to charge higher prices and hence discriminate between locals and tourists. The effect of the sentiment stated above is that the poorer local residents may pay more for goods than what they would have without the tourists.
- Foreign currency leakage: for many underdeveloped countries the pursuit of tourism ventures is often associated with huge importation of materials which are sourced from developed countries, which ironically are source markets for tourists. Tourism receipts may fail to justify such import expenditure and support these sentiments (Getz, Andersson and Larsson: 2007).
- Foreign domination by multinational tourism and hospitality companies suffocates local entrepreneurship potential and is often reviled for foreign currency leakage from the developing to the developed countries where the multinational companies are based.

Briedenhann and Wickens (2004:71) noted that owing to financial and economic pressures governments in developing countries often fell victim to the devastating negative impacts of

tourism owing to a combination of lack of foresight, consultation and ad hoc planning. According to Briedenhann and Wickens (2004:72), although tourism has some negative impacts, proper planning, the clustering of activities and attractions, in less developed regions, stimulates mutually beneficial relationships between neighboring regions which can serve as a vehicle for development that is driven by tourism. Scholars (Frederick, 1993; Briedenhann and Wickens, 2004; Getz et al., 2007) often differ on the methodology and strategies of the nature of truly beneficial tourism prescription for developing countries, but seem to agree on two important facts: tourism comes at a cost, and properly planned tourism development is a panacea for driving economic growth, reviving hope, stimulating social regeneration and improving the living conditions in marginalized regions.

1.3 Literature Review

Literature on the development of tourism in Rwanda suffers from a lack of documentation. However, some scholars have recently attempted to trace the development of tourism in Rwanda and this research is one beneficiary of the work of such scholars. The works of Dian Fossey in the 1960s; Briggs and Booth, 2004; Briggs and Booth, 2007; Mazimhaka, 2007; Ngenzi, 2009, and Nongovernmental Organisations (NGOs) such as the United Nations in collaboration with the Government of Rwanda and its tourism bodies such as the ORTPN and RTWG, have assisted this research with relevant literature. The work of Fossey in particular, and the articles she published in the Courier Journal, the third largest daily paper in the United States, and the National Geographic Magazine, popularized mountain gorilla tourism in Rwanda, although she herself was strongly against such tourism (Wikipedia.org, undated).

The literature, which mostly deals with Rwanda tourism, is concerned with what is available now without much detailed history regarding the development of the tourism sectors in Rwanda. The available literature, however, pinpoints the fact that there has been enthusiasm for the development of tourism since pre-independent Rwanda, centered mainly on mountain tourism (Mazimhaka, 2007; Briggs and Booth, 2004; Ngenzi, 2009). Grosspietch (2004:228) discussed the development of tourism and its contribution in post-independent Rwanda. He noted, before the 1994 genocide, that tourism in Rwanda was the third largest foreign currency earner making significant contributions to the gross national product and to employment creation. Following the genocide, the new government rejuvenated the country with new hope and optimism in which tourism is one of the key drivers for economic growth (Katarebe, 2002; Stratte-Mc Clure, 2003; Grosspietsch, 2004).

1.3.1 History

Gitera (2008:14) asserts that Rwanda existed long before European colonization. Pre-colonial Rwanda was a united society with its own identity, distinct culture, socio-economic and political structures. The population of Rwanda comprised of three ethnic groups, namely the Tutsi, Hutus and the Twa. The Hutus and the Tutsis shared the same language, religious beliefs and culture (Grosspietsch, 2004:227). Rwanda was organized into clans and for governance sake these clans were important political and social structures that constituted the order and chain of command of the society in terms of authority (Remmie, 1972:49). The clans lived in harmony, peace and respect with each other and there were clear channels for dispute resolution.

However, the arrival of the Germans in 1899 changed the political and social structure of Rwanda. The Germans employed a divide and rule strategy to strengthen their colonial power in Rwanda and indeed the people were divided into ethnic clans. On taking over from the Germans, the Belgians perpetuated the same strategy of divide and rule more strongly and directly (Gitera, 2008:15). Kagame (1943:11) explains that the Belgians favoured the Tutsi minority group and strategically handed over all administrative authority to the aristocratic Tutsi overlords of the Nyinginya clan. The colonizers created such ethnic awareness and re-emphasized the people's differences with such vigor and shrewdness, that the Tutsi became the dominant clan over the Hutu majority. To reinforce the divisions, the colonizers introduced compulsory identity cards that clearly endorsed the ethnic clan of the cardholder. Sebahara, (1998:86) noted that pre-independent Rwanda experienced at least half a century of ethnic classification, divide and rule policy, and socio-cultural unsettlement at the hands of the European colonizers.

On attaining independence in 1962, the people of Rwanda were still divided by ethnic classification. The divisions were a source of mistrust and unfounded hatred that later culminated into the 1994 horrific genocide. The image of Rwanda, even to date, is tainted by the 1994 genocide that, according to Grosspietsch (2004:227), was one of the worst acts of cruelty and inter-tribal conflict since the Holocaust. Tourist arrivals dropped drastically after the genocide, and for ten years up to 2004 arrivals were still lower than the time before the genocide, by close to 80% (Grosspietsch 2004:228). The National Patriotic Front (NPF) stopped the incomprehensible atrocities in 1994 on assuming power. The new leadership renewed hope, unity and energy for the people of Rwanda by strongly denouncing ethnic divisions. Ethnic identification was banned and every citizen is now referred as Rwandese.

The NPF steered Rwanda out of political turmoil and socio-economic doldrums with such vigor and energy that Rwanda is considered as one of the more optimistic nations in the world (Finlay, Fitzpatrick and Ray, 2000:617). The country experienced a GDP growth rate of 10% between 1994 and 2002, and the image of the country is improving due to good governance, sound economic policies, and the cooperation of the government with the international community. Presently Rwanda is still one of the poorest countries, but it is decided in its optimism and vision (Gitera, 2008:17).

1.3.2 Rwanda in perspective

Gitera (2008:14) noted that the history of Rwanda is characterised by strife, reconciliation and reconstruction, with economic hope pinned on tourism. He also repeated that tourism's impact on the GDP was estimated at 3.5 percent in 2008, and by 2016 it is expected to account for 5.8 percent of the GDP and 4.6 percent of total employment (Newtimes.co.rw, undated). Rwanda's tourism as a whole has become a major boost not only for environmental protection but also for economic development and growth. But the general population has still to learn the employment potential of tourism.

The Northern Province has an area of over 3331 km² and a population of more than one million, six hundred and four thousand, nine hundred and ninety seven (1 604 997) inhabitants (statistics.gov.rw 2001). The major part of the Northern Province is dominated by high mountains, separated in their north from the volcanoes' chain by a plain of fertile lava soil. The climate is generally mild with good rains all year around.

The Northern Province was created by the Organic Law No. 29/2005 of December 2005, which established the administrative organs of the region. The Northern Province is the result of the fusion of the former provinces of Ruhengeri, Byumba and the northern part of Kigali Ngali. It presently comprises five (5) districts namely: Burera, Gakenke, Gicumbi, Musanze and Rulindo, with eighty nine (89) sectors, 413 cells and 2743 quarters according to the Republic of Rwanda.gov, (Undated).

This province is the most visited by tourists to Rwanda; hence, much emphasis was placed on the economic development of this young and economically reliable industry in this Province. The tourism industry is large and comprises many sectors that work dependently to satisfy the needs of tourists. Visitors come to Rwanda to see wild animals, particularly the famous mountain gorillas, whose range is restricted to the slopes of the Virunga in the Province. Visitors who

leave their countries (international tourists), or any other region of the country (domestic tourists) for a visit to the Northern Province to see the famous mountain gorillas will absolutely need all or some of the following services:

- Travel services
- Transportation
- Accommodation
- Food and beverage, and
- Entertainment and recreation.

Tourists need more than one service from the different sectors to satisfy their needs. This research seeks to identify the economic development of each of the above-mentioned tourism sub sectors in the Northern Province, to the ultimate benefit of local people. One may regard tourism as a team, tourism sectors as players, a tourist as a ball, and his/her satisfaction as a goal. Therefore, each and every player must play well his/her role to ensure the success and development of the Rwandan tourism team.

1.3.3 The importance of tourism to Rwanda

The importance of tourism is well recognised in Rwanda (Grosspietsch, 2004; Briggs and Booth, 2004; Mazimhaka, 2007; Gitera, 2008; Ngenzi, 2009). The potential of tourism development and the benefits accruing from tourism are also acknowledged. However, tourism development in Rwanda is constrained by a number of factors. These constraints range from a lack of human and capital resources, underdeveloped infrastructure, lack of cutting edge innovative marketing strategies, overreliance on one tourism product, and lack of understanding of the potential of tourism to develop Rwanda. The current trends in tourism seem to work in favour of Rwanda's tourism industry. Popular trends lean towards promotion of quality tourism contrary to mass tourism which was popular between the 1960s and the late 1990s. Quality tourism refers to tailor-made tourism experiences, which are primarily aimed at enhancing tourism experiences on an individual level, whilst minimizing negative impacts on the host destination, according to the sentiments proposed by Briedenhann and Wickens (2004:72). Terms that are interchangeably used to refer to quality tourism include sustainable tourism, ecotourism, green tourism and low volume tourism. The terms stated above are related but strictly different, but have a connotation of human upliftment.

In 2002 the United Nations Development Programme (UNDP) delegated the United Nations World Tourism Organisation (UNWTO) to prepare a Plan of Priority Action of the revitalisation of

Tourism in Rwanda (UNWTO Barometer, 2009:9). The UNDP, in conjunction with the WTO and the Government of Rwanda agreed that tourism was one of the quickest and most attractive strategies for the economic development of Rwanda. The reasons that were given to support this proposition are listed below:

- Production and consumption of tourism products and services is simultaneous and fixed at the destination point, which means that travellers have to go to the point of production and consumption for a tourism experience. This opens up opportunities for local businesses, including informal traders, to benefit directly from tourism.
- Rwanda, like many other African countries, has decided advantages of valuable natural assets like the natural landscape, flora and fauna, sunny climate, culture, art, historic and heritage sites. The exploitation of these natural assets for the purposes of tourism has a dual advantage of creating jobs and generating income for local communities, while at the same time helping to preserve and conserve the cultural and natural resources.
- Tourism has a multiplier effect on those industries with capabilities of both initiating development and sustenance of other industries. Tourism also comprises many sub-sectors, which are capable of supporting other economic activities, both through providing casual and flexible employment that can supplement local people's incomes, and through its domino influence on the complex supply chain of goods and services from local economies.
- Tourism is classified as a labour intensive industry. The implication of this is that tourism creates a variety of jobs, which helps to address the problem of unemployment, which is rampant in the Third World and especially African countries,
- Micro enterprises and local entrepreneurial talent is showcased in the formal and informal industries of the country. The benefits of tourism are immediate: start up costs are lower and barriers to entry to tourism are generally low, or can be easily minimized.
- Local people do not only benefit materially from tourism, but more importantly their self worth is promoted through local participation in the preservation and conservation of their land, wildlife, culture and heritage. Although the chief motivation for conserving the environment and culture could be without a doubt economic, it has been noted that along the process, a sense of ownership is created. A sense of security is also created as tourism provides an economic diversification opportunity for local livelihoods.
- Infrastructure is the *modus operandi* for tourism. The construction and expansion of transport facilities, telecommunication facilities, power and energy utilities, water supply and sanitation, entertainment facilities and health services for the purposes of boosting tourism and the destination image, benefits poor communities in various ways, which includes employment and general improvement in living standards (UNWTO, 2010:9).

The potential for tourism in Rwanda is massive. In essence, underdevelopment means that there is vast room for development. As tourism is in its infancy it gives an opportunity for developers to use it as a vehicle for socio-economic development. It has been noted however that though tourism is a lucrative route for development, Rwanda faces a number of constraints in its attempts to develop its tourism industry. These constraints include a lack of financial resources, but this is mainly associated with a lack of awareness among national and international financiers regarding the real potential of tourism in Rwanda. As noted earlier, the potential for tourism has been readily accepted by Rwandan authorities, but the development plans have been associated with a lack of coordination among some actors in the industry. Government

departments are bureaucratic and in some instances political interests overshadow the greater vision of the developmental plans of the country. Heavy reliance on importation of material leads to foreign exchange leakages and Rwanda still needs to develop its human resource capital to ensure that technical skills, knowledge and greater understanding is channeled into the tourism industry through education, training and development of the aspiring players in the tourism industry.

1.4 Problem statement

The economic contributions of tourism to the economy of the Northern Region of Rwanda are not clearly understood by tourism planners and developers, and the local public is not fully aware of the actual potential of tourism's contribution to their livelihoods.

1.4.1 Expanding on the problem statement

The lack of specific and measurable economic goals in the tourism industry of the Northern Province of Rwanda has several implications and consequences for the local economy and livelihood of the local people. Tourism planners and developers rely on subjective estimates, expectations and immediate visible economic indicators in their planning. (Ngenzi, 2009; Mazimpaka, 2007; Gitera 2008). The situation stated above draws a clear picture of ad hoc planning characterised by unrealistic expectations that are created by vibrant hope, without considering the balance between negative and positive impacts of tourism at a local level. There is also inherent danger which is apparently engraved in the habit of measuring economic development of tourism only at national level without measuring economic development/contribution at a local level (Ngenzi, 2009; Mazimpaka, 2007; Gitera 2008).I. The lack of local results is testimony to the lack of local consultation and lack of local participation in the decision-making process of developmental routes and strategies. Evidence from several case studies shows that the lack of local participation in the decision-making process has often been associated with disastrous consequences according to researchers (Ngenzi, 2009; Mazimpaka, 2007; Gitera 2008). These consequences include a lack of cooperation to developmental goals, resistance to change as some ideas could be considered as imported ideas, while some important local values, logistics and politics may not be considered in the tourism plans. Therefore, developmental programs would not make the desired impact.

Some limited research has been conducted to establish the economic development of tourism sub sectors (Mazimpaka, 2007; Gitera 2008). Coordination between the sectors has not been

given much attention, while the contribution of each sector at a provincial level is not known and the importance of the local community has not yet been emphasized. Furthermore, tourism planners and developers in the Northern Province of Rwanda have not provided enough attention to decentralization of tourism economic development from Kigali to a more local level. This research seeks to uncover the contributions of tourism and its subsectors on a more local level, specifically in the Northern Province of Rwanda.

1.4.2 Background to the Research

According to Rwandatourism.com, (undated), Rwanda's economy may be small and predominantly agricultural, but between 2000 and 2011, with political stability, it has posted on average an impressive 9.9% GDP growth rate whilst reducing inflation to 3.2% and currency depreciation to only 6.5% per annum. In Rwanda, tourism is continually growing as an industry. Tourism's impact on the GDP was estimated at 3.5 percent in 2008 and by 2016 it is expected to account for 5.8 percent of the GDP and 4.6 percent of total employment. If one considers tourism impact on the GDP by 2016 and compares it with tourism impact on the GDP in 2008 you find an increase of 2.3% in eight years (Newtimes.co.rw, undated).

Rwandatourism.com shows that Rwanda has three national parks namely Nyungwe in the southwestern part of the country, which is well known for its 13 different primate species and almost 200 types of trees. The Akagera National Park in the eastern region of Rwanda is the home of herds of elephant and buffalo, leopard, hyena and lions. Giraffes and zebras inhabit the savannah, and more than a dozen species of antelope inhabit the Park. The Volcanoes National Park, which is situated in the northwest of Rwanda, protects the steep slopes of this magnificent mountain range, golden monkeys, and the rare mountain gorilla. The respective families of mountain gorillas in this Park number to around 750 animals. With the numbers increasing from year to year Rwanda aims to raise the awareness of the gorillas, and to highlight Rwanda as an excellent tourist destination.

1.5 Objectives of the research

To summarize what is to be achieved by this study, the objectives of this research are the following:

- To identify the **benefits** of tourism's economic development to the Northern Province and its people.

- To identify the main **stakeholders** in tourism development in the Northern Province of Rwanda.
- To determine the importance of **tourism proceeds** to the tourism economic development of Northern Province and its people.
- To identify the main **beneficiaries** of tourism proceeds in the Northern Province of Rwanda.
- To ascertain the **distribution** of tourism income in the Northern Province of Rwanda.
- To identify the main **challenges** to tourism economic development in the Northern Province of Rwanda.

1.5.1 Beneficiaries of the research

Tourism developers and planners: This research seeks to inform tourism planners, government agencies and non governmental bodies, of the weighted benefits of tourism to the economy of the Northern Province, the barriers to tourism development, the need for local population participation and the views of local people about the distribution of tourism resources and income. The information should help developers in their future tourism development planning.

Residents of the Northern Province: Ngenzi (2009) and Gitera (2008), suggest that in the next ten years tourism will continue to grow in importance as one of the world's highest priority sectors and employer. This applies to Rwanda too (Ngenzi, 2009; Mazimpaka, 2007; Gitera 2008). This research is a timely resource for the residents of the Northern Province as it aims to assess the economic benefits of tourism on a local level. Interrogating the distribution of tourism income which sometimes fails to reach the poor public (Singh, 2008; Kulindwa, 2002), and the lack of local participation in tourism development and enjoyment of tourism receipts, have been known to be a cause of civil unrest. The research explores the aspect of local participation in tourism and economic benefits to the poor, with the aim of identifying problems in the distribution of tourism income, and to find strategies that establish equity and sustainable tourism development.

Investors and the private sector: The research aims to explore the plethora of tourism attractions in the Northern Province and the potential of the region to host tourism development in a way that seeks to inform investors of the potential of investment in the tourism industry of the region

Academic community: The research should contribute to the available body of knowledge with respect to tourism in Rwanda. For a country that is little known, with a tourism industry that is largely undocumented, this research could prove a timely resource to the academic community.

1.5.2 Significance and contribution of the study

The numbers of research studies related to this subject are still limited in the Northern Province of Rwanda. In this context, the research should be a significant source of information which provides economic development status of the tourism sub sectors, thus tourism industry as a whole in the Northern Province of Rwanda. This document serves as a guideline on the development of tourism, from dividing tourism as a whole industry into its sectors for proper and specific study, as well as interpretation of each sector. The study should help tourism managers and planners to recognize the economic development of each of the sub sectors of tourism in comparison to one another. This document would further inform the Government (Rwanda Development Board/Tourism and Conservation Department) about tourism economic development status in the Northern Province.

1.6 Clarification of basic terms and concepts

Tourism: Tourism is the sum of the phenomena and relationships arising from the travel and stay of non-residents, insofar as they do not lead to permanent residence and are not connected with any earning activity.

Development: Development is defined as a process in which something passes by degrees to a different stage (especially a more advanced or mature stage).

Travel services: These are agencies that make travel arrangements for tourists or other travelers, for transportation, accommodation, and itineraries. This is one of the tourism sub-sectors that connects the tourist to others services providers.

Transportation: This is the movement of people and goods from one location to another. Modes of transport include air, rail, road, water, cable, pipeline, and space.

Accommodation: This is the act of providing rooms to guests. It is one of the tourism sub-sectors and plays a big role given that a tourist, be domestic or international, spends more than twenty four hours away from home and therefore needs a place to sleep. Accommodation differs depending on the service that is provided to guests. They range from guest house, B&B, small hotel, hotel, international resort hotel, self-catering, serviced apartment, lodge, inn,

restaurant with rooms, campus accommodation, hostel, holiday parks, touring park, and camping parks.

Equity: The principle of equity in trade and society refers to a moral obligation to distribute resources and/or income among the citizens of a society fairly and justly, without favour and prejudice

Food and Beverage: “F&B” is one of the sub-sectors that specializes in the conceptualization, the making of, and delivery of, foods and beverages.

Genocide: Acts of wholesale manslaughter of a specific target group of people mainly driven by unfounded hatred, greedy or political pursuits.

Recreation and Entertainment: This refers to the refreshment of health or spirits by relaxation and enjoyment. Things that amuse, please, or divert, like a performance or show.

1.7 Delineation of the study

The research is limited to tourism entities in the Northern Province of Rwanda. In other words those are people/organisations operating in the accommodation sector, transportation, travel services, food and beverages services, and recreation and entertainment.

1.8 Dissertation overview

This first chapter starts with the introduction, problem statement and the background to the study, it proceeds with the research objectives and the clarification of basic terms and concepts, and lastly it shows the delineation of the study and explains the significance of the study, and contributions of the research.

The literature review in the second chapter considers a world tourism economic development perspective; it continues with tourism economic development on a continental perspective (African perspective) and concludes with the national tourism economic development perspective of Rwanda. The tourism industry is also analyzed by sub-sector.

The third chapter examines the methodology used to achieve the objectives of this study effectively and efficiently.

In Chapter four the questionnaires are coded, analyzed, interpreted and the results are presented.

Chapter five presents the findings and discusses the results.

In Chapter six conclusions are drawn and recommendations regarding the analysis of the tourism economic development in the Northern Province, are stated and addressed.

1.9 Summary

This chapter provides an overview of the research. In the chapter a brief history of Rwanda is provided and the lack of development of tourism is stated. The expectations and plans of tourism in the Northern Province of Rwanda are also stated. Key terms and terminology are explained to enhance understanding. In the following chapter the literature covering the subject is described in more detail. Tourism is one of the most lucrative strategies that could assist in fostering economic development in the Northern Province of Rwanda, and as such research into the current state of affairs in the tourism subsectors is important.

CHAPTER TWO LITERATURE REVIEW

2.1 Introduction

Tourism is the fastest growing industry in the world according to a report cited by Weird Planet (2010). In Africa, where countries are struggling to eradicate poverty and underdevelopment, tourism has emerged as the most lucrative industry for economic development and poverty alleviation. Rwanda is no exception, indeed so, the country has positioned itself to reap maximum benefits from tourism, using the available natural resources. The country has created a stable political climate and opened up to the international community to attract tourism and industrial investment.

The chapter discusses tourism, its sub sectors and development. The definition of tourism, and the relationship between tourism and economic development is also provided, which further discusses the development of tourism from three perspectives; that is the world perspective, the national level and at a regional perspective. The focus is on providing an overview of tourism development from an international level down to a local level. In this way the history and spatial development of tourism is established

2.1.2 Definition of tourism

Literature review shows that a number of definitions of tourism have been postulated. In fact, the term tourism has been over-defined according to the observations of Smith (1988:179), who noted that the reason for these many definitions is the fact that tourism is a big industry with many sub sectors and stakeholders. Each stakeholder defines tourism from their perspective representing their own perceptions and interests. One of the oldest and more encompassing definitions of tourism is that which was proposed by Jafari (1977:6), "...tourism is the study of man away from his usual habitat, of the industries which respond to his needs, and of the impacts that both he and the industries have on the host's socio-cultural, economic and physical environment.." This definition highlights some important elements of tourism. Firstly it is clear from the definition that tourism involves trips from normal areas of domicile to places referred to as the host destination. It is not clear though from Jafari's definition what length of stay is considered to be of a tourist nature. The definitions also suggest that a number of industries support the basic and leisure needs of a tourist while they are away from home. Equally important in the definition is the recognition that the collective activities of the tourist, and the industries that serve the needs of the tourist, impact on the destination communities' socio-

cultural, economic and physical environment. As noted by Smith (1988:180), the definition describes tourism from an intellectual and academic perspective, more useful for academic research with little industrial relevance. To cover for the shortcomings of the definition, Smith (1988:184) postulated what he thought to be a more encompassing definition of tourism. "Tourism is the aggregate of all businesses that directly provides goods or services to facilitate business, pleasure and leisure activities away from the home environment".

Smith's definition recognizes tourism as an industry but also lacks the time frames missing in Jafari's definition. Smith's definition seems to have omitted the fact that tourism has got positive and negative impacts on the host environment. Deducing from the sentiments above a more encompassing definition can be formed. The World Tourism Organization (WTO) handbook (1981:89) defines tourism as the sum total of all activities and their impacts of businesses directly supplying the needs of business or leisure travelers away from their normal environments of residence for a period of more than 24hours. It is clear from the WTO definitions that visits that are less than 24hrs are not considered as tourism trips. The following section discusses the various sectors of tourism that are mentioned in the definition given above.

2.1.3 Sectors in the tourism industry

The needs of a traveler away from home are served by various businesses. These businesses can be classified into sector groups of the greater tourism industry. It is relatively easy to classify the sectors as they are based on the needs of the tourist. According to an internet publication by the Canadian Tourism Human Resources Council (2010:1) tourism is composed of the following eight sectors

1. Accommodation
2. Adventure tourism and recreation
3. Attractions
4. Events and conferences
5. Food and beverage
6. Tourism services
7. Transportation
8. Travel trade

Each of the eight sectors is briefly discussed below.

2.1.3.1 Accommodation

The accommodation sector comprises bed and breakfasts, hotels, motels, lodges, guest houses, farm houses, and camping sites, and other forms of shelter that tourists can rent while on holiday or business trips. The accommodation sector basically caters for the tourist's need for shelter and sustenance while away from their normal areas of residence. The accommodation sector is one of the largest industries in the world, generating millions of dollars in revenue. In South Africa, for example, the accommodation sector generated R28 122 million in 2009 according to figures released by Statistics South Africa (2010a:2). Statistics from Canada confirms that the accommodation sector is also among the fastest growing industries in the world. Between 2005 and 2010 the Canadian accommodation sector experienced a growth rate of 39% according to the Canadian Tourism Human Resource Council (2010) and total spending for 2009 reached \$17 478 781 000 according to results released by the Hotel Association of Canada (HAC, 2009)

Rwanda's accommodation sector comprises of bed and breakfast (B&B), Inns, hotels, lodges, motels and chalets. Like most other African states, statistics on the performance of accommodation are not easily accessible but there are general proclamations by governments claiming huge growth rates in accommodation and the tourism industry. As demand for accommodation increases new jobs are created, career development becomes possible for those employed in the industry, designs and quality of accommodation improves, and from small guest houses to large hotel chains experience growth. The development of big hotels is normally undertaken by large multinational companies and involves bilateral arrangements between government and investors. Big hotel development, mostly by multinational companies, is viewed as a form of direct foreign investment necessary for economic development of a host destination.

2.1.3.2 Adventure tourism and recreation

As the name suggest adventure tourism is a sector of tourism that serves the tourist's need for exploration, knowledge of the rare and dangerous environments and activities that involves an amount of intense physical activity and risk. Adventure is defined as "...a chance of danger, or loss; risk, a hazardous enterprise..." (New Shorter Oxford English Dictionary, 1993:31)

The term adventure tourism can be defined as the aggregate of all outdoor activities carried out by tourists and tourism enterprises, involving close interaction with the natural environment and containing an element of risk, in which the outcome is heavily influenced by the participant,

environment, and the management of the tourist experience (Hall and Weiler, 1992:143). The changing tourism trends indicate that adventure tourism is becoming very popular with travelers seeking active recreational experiences in the natural setting. In 2010, the Canadian adventure tourism sector had 7 659 000 people under its employ according to Statistics Canada (2010)

The various adventure activities that tourists can engage in Rwanda according to (Mazimhaka 2001; Booth and Briggs, 2004; Ngenzi, 2009) are briefly described below:

- Backpacking is sport of hiking with a knapsack on the back with food and clothing supplies for the journey.
- Bicycling is sport of riding bicycles in different terrains, including mountains. This activity is popular in the Virunga mountains of Rwanda.
- Kayaking is the sport of moving locally made kayaks over water bodies like Lake Kivu.
- Rogaining refers to the leisure activity of long distance cross-country navigation. It is especially interesting in the thick forests of Rwanda and tests the route planning, map reading and navigation skills of participants.
- Orienteering is more like rogaining but it is more vigorous and involves more discipline and control. Orienteering is a longtime component of initiation activities like scouting programs such as the Boy Scouts of America and other Scouting groups.
- Sailing and boating is sport that involves movement of specially crafted ships or boats on the water surface by manipulating wind energy. In Rwanda this sport is not popular; rather recently a motorized boat on the Akagera River in the Akagera Park is being used for leisure purposes according to Ngenzi (2009:51).
- Diving is a leisure activity in which participants plunge into the depth of water bodies headfirst. The activity is often associated with viewing of aquatic animals. Despite having a range of water bodies in Rwanda the sport is still in its infancy.
- Mountaineering is sport that involves climbing of mountains on foot for enjoyment or competition. The sport is very popular in Rwanda and is commonly carried with trekking (Mazimhaka 2001; Booth and Briggs, 2004; Ngenzi, 2009)
- Ballooning is leisure sport in which hot air usually helium, because of its density is used to float around a carriage balloon. In Rwanda , Kenya Rwanda safaris operates hot air balloon trips between Rwanda and Kenya parks (www.governorscamp.com)
- Skydiving is a highly specialized and risk sport in which participants jump from an aircraft into space and practice a few free-fall maneuvers before landing on the ground with the aid of a parachute. The Rwanda National Army and a few private specialists offer these courses to tourists in Rwanda.
- Trekking is the sport of following animal footprints and finding them in their natural habits. Special skills are required for these and rangers usually guide tourists through the forests. In Rwanda gorilla trekking is the most popular activity with tourists.
- Hiking is the sport of long distance walking on given trails.
- Rock climbing is a special skills sport in which participants test their climbing skills on steep rocky topographies which are abundant in Rwanda.

Adventure tourism has provided Rwanda with an opportunity to develop tourism sustainability. Under the banner of ecotourism, tourism development can be achieved using the natural

resources that are available which include large unspoilt mountainous environments with a plethora of flora and fauna. Activities that are available include mountaineering, trekking, backpacking, hiking, rock climbing, rafting, hang gliding and ballooning. Rwanda earns more than 30% of its foreign exchange revenue from ecotourism mainly based in the mountain gorilla habitat in the Volcano National Park according to McNeilage (1996:338).

2.1.3.3 Natural and manmade attractions

Attractions are special areas of tourism interest capable of drawing visitors from distant countries to the host destination. The work of Bonn et al., (2007:345), suggest that the combination of the physical environment and heritage attractions can be used to create brand meaning and uniqueness in the minds of tourists, thereby imprinting a brand name and increasing competitive advantage for a destination reliant on heritage attractions. Attractions include places of special interests like historical sites, cultural and heritage sites, museums, galleries, casinos, water parks, amusement park, theme parks, botanical gardens, casinos, landmarks, research centers, zoos, and mystery places. In Rwanda these attractions include mountain gorillas in the Volcanoes National Park, Lake Kivu , Akagera National Park, Genocide Museum, tea and coffee plantations and various cultural centers dotted in Rwanda's major towns and cities.

Yale (1991:253) noted that the history and cultural life of a country or region are forms of tourist attractions which with the passage of time have been popularized to be industries in themselves. It is because of this phenomenon that Las Vegas attracts millions of tourists per annum because of its casinos and gambling. In Zimbabwe, Great Zimbabwe is a heritage site that draws tourists from overseas, and in France the Eiffel Tower is a landmark that tourists would not want to miss upon visiting Paris. It is important to note that many heritage and cultural attractions are educational in nature and the rest of attractions are purely for entertainment. In Europe and the rest of the developed world a combinations of heritage sites and massive engineering feats encompassing high technology developments act as attractions. African countries rely heavily on natural attractions and few places of historical significance, notably the pyramids of Egypt, Zimbabwe ruins, the Battlefields in Kwazulu Natal in South Africa, and in Rwanda the Genocide Memorial Museum attract significant international attention from travelers.

2.1.3.4 Events and Conferences

Hiller (1995:375) asserts that conferences, conventions and congresses involve a form of travel in which the main purpose of the visit is a formal meeting. Conventions are much bigger than

conferences and the bigger they become may trigger the need for many different service providers like different lodging establishments, and different transfer companies as one individual company may lack the capacity to serve the multitude of the visiting delegates.

South Africa recently hosted the FIFA 2010 Soccer competition and the country received slightly over a million visitors by July 2010 (Department of Home Affairs, 2010). Rwanda hosted the Africa under 20 soccer competition in 2009 and the Africa under 17 soccer completion in 2011 and received a fair number of visitors, although the figures are not immediately available. History of the FIFA world soccer competition shows that this event is a mega event/hallmark event. Ritchie (1984:3) defined hallmark events as ‘...major one time or recurring events of limited duration, developed to enhance the awareness, appeal and profitability of a tourism destination in the short or long term’. Hallmark events take several years of planning and are associated with massive infrastructural development. The development of infrastructure has great spinoff benefits to host communities, a fact acknowledged by the sports minister of Rwanda when he was quoted saying “...we want to use these competitions to welcome visitors to our country and boost our infrastructure...” (Habineza, 2011). In fact, the primary goal of conferences and events is to brand or rebrand a destination in a positive and dynamic manner capable of attracting and sustaining future tourism volumes.

2.1.3.5 Food and Beverage

The food and beverage sector comprises of various establishments that offer food and drink for a profit. This sector serves to satisfy the needs of the tourist to eat and drink. The food and beverage sector is closely linked to accommodation, and they collectively form the hospitality industry. Food and beverage enterprises include fine dining restaurants, quick service restaurants, cafés, institutional food outlets, catering firms, pubs, bars, nightclubs and lounges.

The food and beverage industry is a large sector. In Canada it is considered a 32billion dollar industry per year and in 1995 it had 913 000 people directly under it employ according to the Canadian Tourism Human Resources Council (2010:7) The sector is also experiencing phenomenal growth, for example the South African food and beverage sector experienced increased earnings of 5, 2% between 2009 and 2010. (Statistics South Africa, 2010b). For many African countries like Rwanda, the food and beverage sector still needs to improve to gain international acclamation such does the French cuisine. The lagging behind of the African food and beverage market implies that there is an opportunity to be exploited in this regard. The

potential of food and beverage is so apparent that for countries that encourage the improvement of this sector the benefits are massive. Information show that Africa's food and beverage industry has an annual growth rate of 6% against a comparative 2% for the USA in 2009 (<http://www.tradeinvestafrica.com/news>). Trends in the food and beverage sector are also rapidly changing prompted by the ever-changing customer needs and preferences. Food and beverages in Rwanda were affected by an 3.3% increase in inflation between 2009 and 2010 (National Bank of Rwanda, 2010) but the total income from the food and beverage sector is not immediately available, stressing again the lack of industrial statistics in Rwanda

2.1.3.6 Tourism Services

The tourism services sector refers to organizations that specialize in serving the needs of the travel and tourism industry without directly dealing with the tourists themselves. A tourism services sector is composed of government, marketing bodies, tourism education councils, standard and quality associations, tourism training centers and retail services. The roles of the government sectors are briefly explained below:

- Government- the Government of Rwanda has cultivated an environment for businesses by ensuring political stability, law and order, infrastructure, signing bilateral and trade agreements, destination marketing, encouraging entrepreneurship and putting in place policies to develop tourism sustainably (Gitera, 2008:19)
- Marketing Bodies- such as the RTWG, KIST and ORTPN, all conduct research in the tourism industry to determine trends and to provide tourism suppliers with information on how to respond to customer needs in various situations. Marketing bodies can be governmental like Rwanda Development Board/Tourism and Conservation Department, or local authority bodies like the Northern Province Development Board or private interest groups like Rwanda Tours and Travel Association (RTTA). The reports they generate are useful for tourism planning and development and also very important in shaping tourism policy.
- Trade associations include quality and standards bureaus, training and development associations, advocacy associations such as environmental groups and special groups such as hospitality associations, and travel agent associations. Some specialize in advocacy and lobbying, while others specialize in marketing, research, standards and quality control.
- Retail shops are an integral part of tourism because tourism uses them frequently. In fact some destinations like Dubai have gained a reputation in tourist shopping which forms part of their attractions package. Though the retail industry of Rwanda does not compare to Dubai or South Africa, on a more regional level there is a fairly good selection of good shops in Kigali.

2.1.3.7 Transportation

The transportation sector is responsible for moving tourists and their goods from their areas of normal residence to desired destinations. Travelers and their goods are collectively known as traffic. Transportation takes the form of air, road, rail and water modes.

- Air transport refers to the airline business. It is composed of scheduled and chartered flights. There are also domestic and international flights and the development of air travel will be discussed in detail in the following section.
- Rail transport is one of the oldest forms of transportation and has undergone much change and development. From the days of steam engines to the introduction of electric railway transport has been a very important form of affordable transport. Today rail transport still moves large numbers of people from place to place, but other forms of luxury rail transport specifically meant for tourists comfort and enjoyment has emerged. An example is the Blue Train in South Africa. In Rwanda there is no rail transport.
- Road transport is the most common form of domestic transport in the world. In Rwanda road transport entails cars, overland tourist trucks, buses, luxury coaches. Road transport is the second cheapest form of transport following rail transport. In many instance road transport is the most used domestic system between different points of tourist interest in the host country. In Rwanda road transport also affords the tourist scenic viewing while traveling and multi-stops are very possible.
- Water transport refers to the movement of traffic over masses of water. The Transport Corporation of India (2010) broadly divides water transport into two categories that is inland water transport and shipping. Inland water transport comprise of natural modes as navigable rivers like the Taapi and Krishna and also manmade waterways like canals and lakes. Example of inland transport includes houseboats and ferry boats. Shipping refers to transportation over sea bodies and includes such examples as cargo and cruise ships. Rwanda recently acquired a leisure boat that is used for tourism purposes on the Akagera River.

2.1.3.8 Travel Trade

The commerce dictionary defines the travel trade as all businesses that organize travel for people (www.commercedictionary.com/definition/travel-trade.html). The travel services sector assists travelers with holiday planning, reservations and bookings for products and services like accommodation, transport, tours and other travel related services, and the travel press. The travel sector is the intermediary between travelers and tourism products suppliers. The sector supports bookings and sales of travelers and tourism suppliers. The travel sector can be conveniently divided into two sub-sectors, which are the retail and the wholesale categories. The difference between the two sub-sectors is that the retail sector sells directly to members of the public and businesses while wholesalers develop and package tours that they sell to retailers. Retailers are collectively referred to as travel agencies, while the wholesalers are known as tour operators. In Rwanda, the RTTA has the mandate to oversee the activities of the travel trade in collaboration with the ORTPN.

2.1.4 Definition of economic development

According to McCann (2002:390-391), economic development refers to the increase in activities that earns the public wealth as shown by growth in the number and quality of jobs, expansion of the tax base and the ability of the community to pay for services. He makes a distinction between general development and economic development. The difference being that general development exceeds the confines of economic activities to include growth in the quality of life as a whole. Development measured in this way would include improvement in the quality of air, morality, the environment and economic growth. Economic development is desirable but the attainment of economic development can compromise some equally important aspects of life. The development of tourism for example, has been largely associated with environmental and socio-cultural degradation, the very reason why Dian Fossey, who popularized gorilla tourism in Rwanda, was opposed to tourism (Briggs and Booth, 2004). Fossey's opposition to gorilla tourism was based on the fact that gorillas are vulnerable to virus that cause flu and their constant contact with humans expose them to diseases. Likewise, industries like mining, fishing, petroleum and agriculture have also been hailed for bringing economic growth to benefiting communities, but have perpetuated environmental problems such as pollution, deforestation. The implication of these sentiments is that economic development should be in check with other important sectors of the community. Rather what is desirable is sustainable economic development more so than mere economic development. The Rwandan Government adopted the protection of the environment and the promotion of tourism among the main focuses of poverty reduction and development in its document "Vision 2020", with the overall aim to prop up sustainable development. Rwanda's Vision 2020 is a strategic plan aimed at reducing poverty and dependency on foreign aid by promoting macroeconomic stability, entrepreneurship and a knowledge based economy. (Republic of Rwanda Ministry of Finance and Economic Planning, 2000:9)

2.1.5 Economic development and tourism

Tourism has been hailed as an industry that could assist third world countries to deal with problems of underdevelopment and poverty. In fact, for many countries tourism is the only realistic option to advance economic development in their respective countries. Tourism has the potential of opening up a destination to the whole world, therefore facilitating trade and investment.

The World Travel and Tourism Council (WTTC, 2010:12) asserts that tourism is the largest industry in the world, employing over 235million people and generating 9.4% of global GDP in 2009. It reported that, for the same period, Rwanda received US\$428,2million in tourism receipts and was expected to increase to US\$863 by year 2020. Contribution to the Gross National Product in 2010 was 8.4% and direct employment stood at 122 000 jobs and was projected to reach 160 000 jobs by 2020. Export earnings from international visitors for 2010 generated 40.8% of total exports (RWF145.9bn or US\$250.4mn) and total investment in travel and tourism reached US\$250,4million, 9, 2% of total investment in infrastructure and services for Rwanda.

The economic benefits of tourism are apparent; increase in foreign currency earnings, job creation, direct foreign investments, development in infrastructure, commercialization of local arts and culture becomes possible, and local entrepreneurship is promoted as local shop owner's benefit from tourists purchasing goods, curios, local artifacts and daily conveniences. Increasingly social scientists have warned developers to be cautious of pursuing tourism for its economic benefits while neglecting its negative impacts on the environment. Social scientists, especially environmentalist camps are advocating for sustainable tourism development. The United Nations World Commission on the Environment (UNWCED) defines sustainable development as "...as a development that meets the needs of the present without compromising the ability of the future generations to meet their own needs..." (UNWCED. 1987:42)

The UNWCED definition implies then that sustainable tourism development is exploitation of tourism resources in such a manner that the present consumption would not impact on the future generation consumption of the same tourism resources, a stance that is clearly stated in the Rwanda's "Vision 2020". The WCED compass of thought is a noble one but achieving such a development with conflicting posts is problematic, Tosun (2001:289).

Evidence from research reveals that the tourism industry is a big business, with some special forms of tourism are already business (Michael, 2002; Timothy, 2005; Lapitskaya, 2005). The literature review also shows that the tourism industry is the fastest growing industry in the world with great future potential (WTTC: 2010). In Rwanda, tourism is associated with economic development and is currently the most attractive industry to diversify the economy according to researchers (Ngenzi, 2009; Gitera, 2008). Tourism has the potential of bringing economic growth to Rwanda but needs to be planned and managed to attain sustainable development.

2.2 The development of tourism sectors: a world perspective

The discussion will first centre on an international perspective, followed by an African perspective, then a Rwandan, and finally a provincial perspective. The development of tourism is closely associated with improvement in living standards in Europe and the USA. Early tourism was, however, associated with adventure in unknown territories in pursuit of scientific knowledge, land and wealth according to Weber (2001: 363). The main transport system for domestic tourism was by road and for overseas explorations was by water transport. Brave sailors reached distant places gradually, discovering new places of which some they came to like obsessively. The work of Steyer (2009:233-235) documents the famous explorations of Charles Darwin who traveled the world in search of knowledge particularly about creation and the origins of mankind. Early tourism were limited by transport according to Steinecke (1993)

Major inventions in transport in the 19th and 20th centuries enabled more mobility, greater production and a need to find new sources of raw materials in Europe. The mercantile era witnessed the development of transport, tourism services, and food and beverage sectors as explorers and merchants traveled abroad in search of fortune and leisure. According to the Wikipedia (n.d.), tourism became more apparent with the introduction of the Grand Tour in Europe. The Grand Tour was a traditional European trip, undertaken mainly by wealthy European young men from noble families across the continent. The custom flourished from 1660 until the introduction of public rail transport in 1840. Initially the tour composed of a standard itinerary, mainly aimed at increasing knowledge in the arts, culture and language of some European states, of the British young noble class. Wealthy young men of Protestant North Europe later joined in the trips and the Americans joined in the 18th century. The tradition was extended to include more of the middle class after rail and steamship travel made the journey less expensive, and Thomas Cook made the "Cook's Tour" a byword. The first World War increased the need for improvement in transport. After the First World War the economic boom in America also promoted the development of tourism. The Second World War also witnessed major inventions especially in air transport.

After the Second World War, tourism gained momentum and businesses such as Thomas Cook, which had already established tourism services companies, continued to serve the needs of travelers and holiday makers with renewed vigor and propensity due to favorable conditions. Tourism then was concentrated in Europe and gradually changed in proportion to other destinations. Statistics show that in the 1950s, the top destinations were in Europe and USA and accounted for 98% of all international arrivals, in the 1970s it had changed to 75% and in

2007 it had dropped to 57% reflecting the emergence of new destinations, most of which are in Africa and the developing world. (UNWTO World Tourism Barometer, 2009)

Presently, the tourism industry with its eight sectors has become the largest and the fastest growing industry in the world. According to UNWTO World Tourism Barometer (2009) tourism earnings reached a record US\$856 billion in 2007, an increase of 5.6% from 2006. The financial crisis in the USA, and subsequent melt-down in Europe, slowed the momentum from 2008 to date. Forecasts made by the UNWTO World Tourism Barometer for the transport sector for 2010 were US\$165 billions which, when added to the US\$856 billion amounts to US\$1 trillion in international tourists' receipts. Employment in the tourism industry reached 235million people in 2009 according to the WTTC (2010:13).The statistics above show how much the tourism industry services industry has grown in size and strength.

2.2.1 The development of the travel services sector

The concept of travel for leisure before the First World War 1 was primarily confined to the wealthy society. The emergence of the travel agency business is believed to have been in the United Kingdom (UK) according to the Wikipedia (Wikipedia.org). Cox and Kings, a financial services company in the UK is also believed to be the oldest travel agency established in 1758 to cater for the travelling and leisure needs of its affluent customers.

During the 19th century, Thomas Cook developed what is known today as the travel agency. Thomas Cook developed package tours, which became very popular. Thomas Cook's first commercial venture took place in the summer of 1845, when he organised a trip from Haborough to Liverpool. This tour was well planned in a 60 page brochure with detailed itineraries and the costs involved (Thomascook.com). Other companies that quickly developed after Thomas Cook on the streets of London were the Polytechnic Touring Association, Dean and Dawson, and Cooperative Wholesale Society. The partnership between Thomas Cook and the Midland Railway company opened avenues for leisure travel to the middle working class. In the 19th Century Thomas Cook became a household name (Thomascook.com), establishing a chain of agencies in which the agency not only sold its own package tours but also became an intermediary between the clients and other agencies. In the USA the oldest travel agency is believed to be Brownell Travel that was established in 1887 (Wikipedia.org)

The recent development of the travel agency is closely associated with the development of the aviation industry. In fact, in some countries, the common belief is that travel agencies only exist

to sell air tickets. In the development of travel agency business focus was on wealth clients, then it spread to middle class citizens, and the advent of mass tourism after 1945, increased the need and importance of the travel agency. Latest trends and developments in information technologies are however eroding the importance of the travel agency. Future trends seem to suggest that the role of the travel agency may at some point in the future not be needed or need to change with changing times. At the moment, the travel agency plays a big role in developing and organizing tours and conferences. The industry employs millions of people across the globe.

2.2.2 The development of transportation sector

Transport is an important necessity for tourism. Pre-historic forms of transport were walking and swimming. The domestication of animals later introduced the development of animal-drawn carriage along animal trails. Roadways were introduced in the early civilization states, e.g. Mesopotamia and Roman empires. The Industrial Revolution in England witnessed a number of inventions that changed the transport sector, such as the invention of the steam engine. Travel remained slow and expensive up to this period.

Major developments in the transport sector are recorded in the table below:

Table 2.1 Historical facts on the development of transport

Invention	Year	County
Steamboat	1787	USA
Bicycle	1790	France
Cable car	1871	UK
Steam engine	1803	UK
Automobile	1885	Germany
Aircraft	1903	USA
Modern helicopter	1940	Germany
Supersonic jet	1947	Germany
Bullet train	1967	Japan

Source: About.com, 2011

The major developments in transport that is relevant to the tourism industry began after the Second World War in the 1950s, with rapid development from the 1960s up until today. The sector has grown from strength to strength employing more people, ensuring more comfort, efficiency, safety and increasingly becoming more affordable.

2.2.3 The development of the accommodation sector

Housing and shelter can be traced back to the time when man started to live in permanent settlements. Before then it is impossible to envision accommodation as everyone was nomadic, according to Enzensberger (1996:122) Travelers in the Dark Ages had to be content with staying in monasteries that offered shelter, food and drink. The stewardship phenomenon developed in the Middle Ages, with the affluent travelers enjoying hospitality services from local landlords in various destinations. Further developments and more commercialization began with the boom of trade and commerce, giving rise to the development of taverns and inns on trade routes and ports.

Enzensberger (1996:125) noted that luxury accommodation was available in the last years of the Roman Empire in the form of luxury villas of marble, and hotels exhibiting great architectural expertise. The early 15th century witnessed the formalization of accommodation in France and England, according to Bonvin (2003). In that period France and England passed laws that required accommodation providers to register with authorities, and to keep a register of their bookings. Bonvin (2003) tracks the development of the accommodation sector as one that was driven by a desire to offer luxury and sophistication in both service and architecture. While trade and commerce from the 16th to the 19th century influenced tourism and subsequently the development of accommodation, some special interest in tourism also played a role in the development of the industry. Enzensberger (1996:126) noted that mountaineers in Europe played a key role in the development of tourism and accommodation. In 1787, Saussure, a mountaineer climbed to the peak of Mount Blanc marking the birth of Alpinism. In the 20th century new prestigious hotels were developed. Examples include l'Hôtel du Palais that was built in Biarritz, the "Négresco" was opened in Nice in 1913, and the Ritz which opened in Madrid in 1910. Bonvin further notes that the 1970s marked the development of business hotels and that in the 1980s hotels began to specialize in serving specific market segments like youth hostels, and business hotels. In the 1990s information technology transformed the accommodation sector into sophisticated buildings with improved property, security and energy management systems. In 1995 a new age in the accommodation sector was marked with the development of super luxury hotels in Dubai blending sophisticated and extravagant architectural expertise, and property management technology with excellent services sometimes called '6 star' services; a term coined from the Dubai developments.

2.2.4 The development of the food and beverage industry

The development of food and beverage industry is closely linked to the development of accommodation services in the tourism industry, especially the development of taverns and inns. However the food and beverage industry is believed to have evolved in China in the 11th century (Wikipedia.org). This industry also known as the restaurant industry catered for mostly middle class merchants and was initially associated with gambling, prostitution and institutions of theatrical drama according to West (1997:69). Keifer (2002:5) states that Paris is often mentioned as the birthplace of the restaurant industry but restaurants have been in existence well before their popularization in France. The reason for this notion is that Paris was the dominant commercial and cultural hub of Europe after the French Revolution. Keifer notes that restaurants developed in quality and type of services with time. Cafes were later developed in 1644 and the Parisian style restaurant in 1792. The fast food concept has been in existence since pre-modern Europe but was only popularized after the First World War in USA. The restaurant business is a \$ billion industry in the USA according to Keifer (2002:7) employing thousands of people in various capacities.

2.2.5 The development of the entertainment and recreation sector

Early forms of tourism can be classified as adventure and recreational tourism as they involved as great amount of risk. Weber (2001:363) noted that early adventures were associated with exploration of distant foreign lands, in search of new scientific discoveries, and wealth. The examples cited by Weber (2001:363) include voyages of Pytheas (c.330BC) and Cook's expedition to Tahiti (1768-71). In these voyages travelers were entertained by music and traditional dances on ceremonies hosted in the places they visited.

2.3 The development of tourism sectors: Continental perspective

Tourism is viewed as one the industries that has great potential for increasing economic growth in Africa, where member countries have limited developmental strategies due to lack of forward planning, finance, infrastructure and expertise (Dieke, 2000: 25). In Africa, tourism development has been associated with slow growth due to lack of infrastructure and marketing. Africa is rich in natural resources, and up until now there has been an over-reliance on natural attractions to develop and sustain the tourism industry. It is fortunate that the trends in tourism favour many forms of adventure tourism, like cultural tourism and ecotourism that Africa is positioned to offer at the moment.

The development of long haul travel in the 1950s opened opportunities for Africa as tourists seeking new adventure experiences visited the continent. The northern African countries benefited the most, mainly due to their close proximity to Europe, which meant cheaper travelling costs. Countries in the south experienced slow tourist growth because of the distance coupled to political instability that characterized southern Africa in the 1960s to 1980s. South Africa was an exception, its developed transport system and wide range of attractions based on the natural fauna and flora, meant that the country continued to be among the top African destinations even in the time preceding its independence. In countries such as Zimbabwe tourism only grew after Independence in 1980 and flourished in the 1990s, but later again declined due to political instability and economic chaos. In Rwanda, tourism was on steady progress until the 1994 genocide. Tourist arrivals dropped drastically after 1994. In 2004 tourists arrivals were still less than those received prior to 1994. The current stability and efforts of the government have however, resuscitated the tourism industry which it is progressing well.

Table 2.2 International Tourist Arrivals and International Tourism receipts: Continental perspective

Major destinations	International Tourist Arrivals						International Tourism receipts			
	2008 (1000)	2009 (1000)	2010 (1000)	Change (%) 09/08	Change (%) 10/09	Share (%) 2010	2008 (US \$ million)	2009 (US \$ million)	2010 (US \$ million)	Share (%)2010
Africa	44,380	46,021	49,376	3.7	7.3	100	30,316	28,780	31,677	100
Algeria	1,772	1,912	..	79	..	..	324	267	..	..
Angola	294	366	425	24.3	16.2	0.9	285	534	..	..
Botswana	1,500	1,553	..	3.5	..	..	553	452	..	..
Cape Verde	285	287	336	0.7	17.1	0.7	358	292	289	0.9
Ethiopia	330	..	..	..	..	..	377	329	..	..
Gambia	147	142	91	-3.5	-35.7	0.2	81	63	..	..
Ghana	698	803	..	15.0	..	..	919	968	..	..
Kenya	1,141	1,392	..	22.0	..	..	752	690	755	2.4
Lesotho	285	320	..	12.3	..	..	24	40	..	..
Madagascar	375	163	196	-56.6	20.5	0.4	351	308	..	..
Malawi	742	755	..	1.7	..	..	43	43	..	..
Mauritius	930	871	935	-6.4	7.3	1.9	1,449	1,117	1,282	4.0
Morocco	7,879	8,341	9,288	5.9	11.4	18.8	7,168	6,557	6,720	21.2
Mozambique	1,815	2,224	..	22.5	..	..	190	196	197	0.6
Namibia	931	980	..	5.3	..	..	378	398	438	1.4
Nigeria	1,313	1,414	..	7.7	..	..	573	608	..	..
Reunion	396	422	421	6.4	-0.3	0.9	448	425	..	..
Rwanda	731	699	..	-4.4	..	..	186	174	202	0.6
Senegal	..	..	..	..	..	..	543	463	..	..
Seychelles	159	158	175	-0.9	10.8	0.4	258	209	..	..
South Africa	9,592	7,012	8,074	n/a	15.1	16.4	7,925	7,543	9,070	28.7
Sudan	441	420	..	-4.6	..	..	331	299	..	..
Swaziland	754	909	..	20.4	..	..	26	40	..	..
Tanzania	750	714	794	-4.8	11.1	1.6	1,289	1,160	1,303	4.1
Tunisia	7,050	6,901	4,785	-2.1	14.0	13.9	2,953	2,773	2,654	8.4
Uganda	844	817	..	-3.2	..	..	498	667	730	2.3
Zambia	812	710	..	-12.6	..	..	148	98	..	..
Zimbabwe	1,956	2,017	2,239	3.2	11.0	4.5	294	523	634	2.0

Source: World Tourism Organization (UNWTO) (Data as collected by UNWTO, June 2011)

Table 2.2 shows that Africa, the only region to post positive figures in 2009, maintained growth during 2010. The region benefited from increasing economic dynamism and the worldwide exposure created by the FIFA World Football Cup. International arrivals increased by 3 million (+7%) to 49 million, while in terms of receipts the region added US\$ 3 billion to reach US\$ 31 billion (+4% in real terms). In South Africa, which accounts for over a quarter of total arrivals in Sub-Saharan Africa, arrivals were up 15% in 2010, following the successful staging of the World Cup. Other destinations in the sub-region, according to available data, performed above average: Madagascar (+21%), Cape Verde (+17%), Tanzania and Seychelles (both +11%). Results in North Africa (+6%) were driven by the leading destination Morocco (+11%).

The data in that table above shows that Rwanda has a long way to go, tourist arrivals and tourism receipts still lag when compared to other African countries. In eastern Africa region like Kenya, Uganda and Tanzania received more arrivals than Rwanda (UNWTO, June 2011).

Table 2.3 International Tourist Arrivals by region of origin: World perspective

From	International Tourist Arrivals by region of origin (million)							Share (%)	Change (%)	Change	Average Annual growth (%)
	1990	1995	2000	2005	2008	2009	2010*					2010*	09/08	10*/09	00-10*
World	435	528	675	798	917	882	940	100	-3.8	6.6	3.4
Europe	250.7	303.4	389.4	450.8	507.5	479.7	491.1	52.8	-5.5	3.4	2.5
Asia and the Pacific	58.7	86.1	113.9	152.7	182.3	178.8	197.4	21.0	-1.9	10.4	5.6
Americas	99.3	108.5	130.8	136.5	151.5	146.3	154.4	16.4	-3.4	5.5	1.7
Middle East	8.2	9.3	14.0	23.3	31.9	32.7	36.0	3.8	2.7	10.2	9.9
Africa	9.8	11.6	15.0	19.6	25.8	25.8	27.5	2.9	-0.1	6.5	6.2
Origin not specified	7.8	8.7	11.4	15.5	17.7	18.6	28.5	3.0	-0.9	9.9	1.7
Same region	349.1	423.3	532.9	632.1	715.9	689.2	721.3	76.7	-3.7	4.7	3.1

Source: World Tourism Organization (UNWTO) (Data as collected by UNWTO, June 2011)

Table 2.3 shows that the large majority of international travel takes place within the traveller's own region, with about four out of five worldwide arrivals originating from the same region. Source markets for international tourism are still largely concentrated in the industrialized countries of Europe, the Americas and Asia and the Pacific. However, with rising levels of disposable income, many emerging economies have shown fast growth over recent years,

especially in a number of markets in North-East and South-East Asia, Central and Eastern Europe, the Middle East, Southern Africa and South America. Europe is currently still the world's largest source market, generating just over half of international arrivals worldwide, followed by Asia and the Pacific (21%), the Americas (16%), the Middle East (4%) and Africa (3%).

Table 2.4 International Tourist Arrivals forecast by regions

Regions	Base year	Forecasts		Average Growth rate (%)	Share (%)	
	1995	2010	2020	1995-2020	1995	2020
Total	565	1,006	1,561	4.1	100	100
Africa	20	47	77	5.1	3.6	5.0
Americas	109	190	282	3.9	19.3	18.1
East Asia/Pacific	81	195	397	6.5	14.4	25.4
Europe	338	527	717	3.0	59.8	45.9
Middle East	12	36	69	7.1	2.2	4.4
South Asia	4	11	19	6.2	0.7	1.2
Intraregional(a)	464	791	1,183	3.8	82.1	75.8
Long-haul(b)	101	261	378	5.4	17.9	24.2

Source: World Tourism Organization (UNWTO) © (Data as collected by UNWTO, June 2011)

UNWTO's Tourism 2020 Vision projects that international arrivals are expected to reach nearly 1.6 billion by the year 2020. Of these worldwide arrivals in 2020, 1.2 billion will be intra-regional and 0.4 billion will be long-haul travelers. East Asia and the Pacific, South Asia, the Middle East and Africa are forecast to grow at over 5% per year, compared to the world average of 4.1%. More mature regions Europe and the Americas are anticipated to show lower-than-average growth rates. Europe will maintain the highest share of world arrivals, although this share will decline from 60% in 1995 to 46% in 2020. The total tourist arrivals by region shows that, by 2020, the top three receiving regions will be Europe (717 million tourists), East Asia (397 million) and the Americas (282 million), followed by Africa, the Middle East and South Asia.

2.3.1 The development of the travel services sector in Africa

The travel services sector, with the exception of South Africa, remains small and unevenly distributed in Africa. The development of packaged tours and the travel agency business in Europe in the mid 19th Century led to the selling of Africa to tourists as a tourist destination. The first true African travel agency is believed to be Trans Africa Safaris, which opened business in 1918 (Transafrica Safaris website. www.transafricasafaris.com). Based in Cape Town in South Africa, Trans Africa Safaris specialized in selling inbound tour packages to southern Africa.

International tour companies were founded, and continue to operate, opening branches throughout Africa.

Developments in communication and information technology in the 21st century are fast threatening the existence of travel service companies around the world, including Africa. In countries like South Africa development in communication and information technologies means that travelers can plan and purchase their holiday packages without the assistance of the traditional travel consultant, using personal computers, emails and the internet. In many African countries information technologies still lag behind and the role of the travel agent is still in demand especially for outbound tourism. Internet access in Rwanda also means that travelers can organise their vacations without involving the travel agency.

2.3.2 The development of the transportation sector in Africa

As noted in earlier discussions, most of the major inventions in transport occurred in Europe, the USA, and more recently in Asia. Africa played a receiving role in these inventions and technologies, which means that the transportation sector of Africa generally lagged behind that of the developed countries. The transport network of Africa developed mainly due to the introduction of trade and commerce with early voyager merchants from the Middle East, Asia, and Europe

Taaffe, Morrill and Gould (1963: 505-507) explained that transportation development in Africa commenced with networks which linked a few scattered harbours and ports to inland raw material supply zones. He noted that later development was centered on the concept of penetration lines, which were water ways and highways developed to reach inland areas for commerce and political interests. Taaffe, Morrill and Gould (1963) distinguished three main important factors that led to the development of transport networks in Africa, between coastal and inland trading posts:

- The desire to control a coastal administration centre to productive inland areas for political and military control.
- The desire to reach areas of mineral importance, and
- The desire to reach fertile inland areas with agricultural export potential.

It is generally believed that of the three factors listed above; the desire to have political and military influence in strategic and productive inland areas played the greatest role in the development of transport networks in Africa (Seleti, 1990; Beinart, 2001). The first railway line linking Cairo to Alexandria was built in Egypt in 1855. In the 1800s the French constructed the

Suez Canal (completed in 1869) that linked Asia to Europe via Egypt and the Middle East, and opened a safe and alternate ocean way between the eastern hemisphere and Europe, especially facilitating the spice trade. The discoveries of gold in southern Africa also influenced the development of transport and tourism. Cecil John Rhodes had an ambitious plan to build a highway, which linked Cape Town in the south to Cairo in the north, as part of his colonization strategy. The transport sector developed due to colonization, trade and commerce. Political instability in many parts, lack of engineering expertise and the lack of financial resources in parts of Africa hampered the development of efficient transport systems. On the African continent, South Africa is the only country with a state-of-the-art transport system, as witnessed during the hosting of the 2010 FIFA Soccer World Cup competition. A comparison of development projects in transport in developing regions are summarized in the table below, for a period which saw independence in African countries, opening the continent to independent trade, the influence of communists countries on the infrastructure development of Africa, and the demise of apartheid in South Africa.

Table 2.5 Estimates of Transport Infrastructure Projects having reached financial closure in developing and transition economies (1990-2001)

	Africa	East Asia	Eastern Europe	Latin America	Middle East	South Asia	Total
Airports							
No of Transactions	10	17	14	32	7	2	82
Value in US\$Millions	375	2,625	1,500	7,125	750	125	12,500
Ports							
No of Transactions	10	52	16	78	8	13	177
Value in US\$Millions	180	8,820	720	5,580	900	1,800	18,000
Rail							
No of Transactions	9	11	7	48	1	0	76
Value in US\$Millions	288	10,080	288	17,856	288	0	28,800
Road							
No of Transactions	9	149	6	137	0	26	327
Value in US\$Millions	2,280	34,200	2,770	36,000	0	750	76,000
Total							
No of Transactions	38	229	43	295	16	41	662
Value in US\$Millions	3,123	55,725	5,278	66,561	1,938	2,675	135,300

Source: World Bank, Infrastructure Vice-Presidency, PPI Database (2002:3)

The table 2.5 above highlights the magnitude of expenditure on transport infrastructure in third world regions. The table shows that Africa is still overshadowed by other developing regions in terms of commitment to developing transport infrastructure, notably Latin America, East Asia and Eastern Europe. Countries from these regions are bound to receive more tourists than Africa due to increased accessibility and mobility.

Deregulation and privatization of the transport sector, which started in the USA in the 1960s, improved the African transport sector, two decades later in the 1990s. Today in Africa, with the clear exception of South Africa, the transport sector still struggles under the inefficient hands of national governments and local authorities.

2.3.3 Development of the accommodation sector in Africa

Julius Nyerere the former president of Tanzania said ‘...Those of us who talk about the African way of life and, quite rightly, take a pride in maintaining the tradition of hospitality which is so great a part of it...’ (Nyerere; 1987:6). The sentiments stated by Nyerere show that the provision of shelter for strangers for free remained part of Africa civilization up until the advent of commercial lodgings during the 16th century. Presently many Africans and visitors to Africa still benefit from this cultural goodwill by staying in the homes of friends, relatives or complete strangers, while on holiday. The development of commercial lodging in Africa is closely linked to the development of trade and commerce in Africa.

Early explorers who came for scientific reasons moved with their tents and caravans. Early merchants and traders needed comfortable shelter from which they could conduct their business. These early merchants also promoted the development of food and beverage services in Africa. However, as part of the colonial history of Africa, the early travelers came with their own designs for hotels, motels, and inns and dictated the type of cuisine offered. Today for example, North Africa is home to many tales of Oriental hospitality. In the south colonial hotels like the Victoria Falls hotel in Zimbabwe and the Mount Nelson in South Africa, bear clear testimony to the influence of colonialism. In Rwanda, hotels like the Ibis, exhibit colonial traits that have to be preserved for tourist purposes. Independent Africa has to be content with keeping these colonial hotels for the tourist interest they generate.

2.3.4 Development of the food and beverage sector in Africa

The food and beverage industry in Africa dates back to the time of early urbanization in North Africa in towns like Cairo and Casablanca. The food industry was then largely composed of street vendors selling ethnic dishes for people who did not have time to cook. However in some parts of Africa, including Rwanda, little is known about the development of food and beverage services owing to the lack of research in the area and lack of documents about the early food industry in Africa.

According to Bromley (2000:5) early foreign traders and settlers introduced the concept of the restaurant to Africa. Along with this development was also the introduction of foreign dishes. Street vendors continued to develop with the growth of urban settlements, and even now street vending still provides quick service food options for the locals and tourists. In some instances street vending is associated with music, and chant sales and street theatrics in a colorful and attractive way that in itself becomes a tourist attraction, according to Bromley (2000:4)

The development of Africa's hotels carried with it growth in the food and beverages sector. As hotels developed, in-house fine dining restaurants were also developed. The fast food international chains like KFC, MacDonald's and Pizza Hut have their presence in Africa. Examples of African chain groups include Spur, Chicken-Linken and Nandos in South Africa, Mr. Briggs, in Nigeria, Chicken and Pizza Inn in Zimbabwe. In Rwanda, fast food operations include Baba's, La Galette and BCK fast food.

2.3.5 The development of the entertainment and recreation sector in Africa

The earliest form of entertainment in Africa is traditional singing and dancing, enacted life situations and music, performed by the locals. Africa is rich with unspoilt cultural music, dance and arts that are unique and a reflection of pre-modern era. Deady (2005:20) noted that music, dance and art form an integral part of Rwanda's social life in which this tradition is taught to children from a tender age. These arts have since been commercialized and are part of tourism attractions in Africa.

Outdoor recreation is also available, mainly associated with Africa's wildlife. Activities that have been identified with Africa include trekking, mountain climbing, hunting and fishing. In a few countries like South Africa, Tunisia and Egypt, modern entertainment like amusement parks, well developed theatres and a vibrant nightlife are available. There is a correlation between economic development and the development of tourism sectors like the entertainment sector. In poorer countries, like Rwanda, entertainment options are few and the nightlife is dull, while in developed countries like the USA and the UK entertainment options are abundant and night life is vibrant.

2.4 Development of the tourism sectors: national perspective

Tourism in Rwanda started as early as the late 19th century according to records (Booth and Briggs, 2004). Tourism began with British and German environmentalists and explores who were

mainly interested in research related to the vast volcanic mountains in Rwanda, and the rare species of mountain gorillas that inhabit the Virunga Mountains. The rare species of mountain gorillas increasingly became the main attraction for conservationists and tourists alike. The early development of tourism in Rwanda is difficult to account precisely due to the lack of documented records but it is believed that the first national park aimed at protecting the gorillas was formed in 1925 (Mazimhaka, 2007:42). The Albert National Park was established around the volcanic mountains of the Virunga area. Booth and Briggs (2004:177) note that the Albert National Park became an important research and attraction centre for environmentalists, zoologists, tourists and naturalists, in the process promoting Rwanda as a tourist destination.

On attaining independence in 1962, the new Government of Rwanda renamed the Albert National Park to the Volcanoes National Park. The new Government pledged its commitment to continue with the conservation and preservation of the Park and its wildlife and gorilla tourism continued to flourish in the 1960s. Booth and Briggs (2004:178) also noted that the development of gorilla tourism gained momentum after 1967, when a zoologist named Diane Fossey published her conservation work on the mountain gorillas.

In 1973 the Government of Rwanda formed the Rwanda Office of Tourism and National Parks also known in French as Office Rwandais du Tourisme et Parcs Nationaux (ORTPN), to oversee the promotion of ecotourism, sustainable development and conservation. ORTPN enabled Rwanda to respond to conservation and developmental needs through formulating new and much needed legislation for national parks, hunting and tourism. Mazimhaka (2007:42-43) noted that ORTPN, with a dual mandate to promote tourism and sustainable development, concentrated on one tourism product in the 1970s and 1980s, and created an over-reliance on the mountain gorillas leading to the lack of diversification. Over reliance on gorilla tourism continues today and the realization for the need for diversification is a recent thing according to Mazimhaka (2007). The fact is understandable; there are only 700 mountain gorillas left in the whole world, and are only left in Rwanda according to the ORTPN (2005a). Rwanda enjoys a monopoly of gorilla tourism and should take advantage of this but equally important is the need for diversification of the tourism product.

2.4.1 Development of the travel services sector in Rwanda

The development of travel services in Rwanda is difficult to trace due to the lack of recorded information which is consistent and coherent. In the early days international tour operators in Europe and the USA, working in partnership with international researchers and conservationists

in Rwanda, were responsible with marketing and planning holidays for tourists to Rwanda. The Government had been actively involved in providing tourism services to international tourists throughout the history of tourism in Rwanda. The ORTPN is responsible for organizing tours in Rwanda. Local tour operators are still few but have increased three-fold since 1994, according to Ngenzi (2009:50). Local tour operators and travel agencies are still in their infancy and cannot compete with international organisers according to the Rwanda Tourism Working Group (RTWG, 2002:10). In fact, the Kigali Institute of Science and Technology (KIST, 2001:32) noted that inadequate local tour operators and travel agencies in Rwanda, including bad services from the ones presently operating, are among the factors that are hindering faster tourism growth in Rwanda.

2.4.2 Development of the transportation sector in Rwanda

The transport system in Rwanda is still underdeveloped and centers mainly on road transport according to Ngenzi (2009:50). The road network of Rwanda covers approximately 14 000Km, of which only 2,662km is tarred. Most towns are connected by paved roads but feeder roads are unpaved and are of varying roughness. Public transport is by way of shared buses between cities and shared commuter taxis within the cities. Express taxis are available at a premium price (Wikipedia.org)

The first airport was constructed in 1986 on the outskirts of Kigali, the capital city. Formerly known as the Gregoire Kayibanda International Airport, Kigali International airport serves as the main gateway into the country. The second largest international airport is Kamembe International in the City of Cyangugu in the Western Province of Rwanda. Rwanda Air is the only airline and is operated by the Government. A number of international airlines also operate in Rwanda especial at the Kigali International airport. According to Ngenzi (2009:50) Rwanda has four domestic terminals.

There is no railway transport in Rwanda. In 2006 the Government approached a Chinese consulting firm to research and carry-out feasibility studies for a rail system. As in the past, Rwanda would have to rely on donor funds to roll out this project.

Water is the traditional form of transport in Rwanda before the advent of tourism. Water transport was not motorized and exists mainly on Lake Kivu and the Akagera River serving both business and leisure travelers. Ngenzi (2009:50) noted that the water transport system of Rwanda is still underdeveloped but at least it is functional, for example, Lake Kivu is used for trans-border

transport between Rwanda and the Congo in the west. Recent developments in the Eastern Province indicate that leisure boats are now operational on the Akagera River.

2.4.3 The development of the accommodation sector in Rwanda

Early explorers began by sheltering themselves in make shift tents and log cabins in Rwanda. The local people, though very friendly and with amazingly warm hospitality, were not in the practice of commercial accommodation. Rather hosting a traveler or a stranger with respect and care is one of the oldest African traditions that made vulnerable and easy prey to conquering imperialists, (Nyerere, 1987).

However, as settlements grew and numbers of visitors increased, the need for accommodation became apparent. The history of the early hotels in Rwanda is difficult to obtain due to lack of records. Today accommodation services are still poor and mostly below international standards according to the Kigali Institute of Science and Technology (KIST, 2001:32). The accommodation sector of Rwanda comprises 2500 rooms, a sum total of 141 registered hotels and guest houses, according to statistics of the Rwanda Tourism Working Group (RTWG, 2002:9)., where 40% of total accommodation capacity is found in Kigali, the capital city of Rwanda.

2.4.4 Development of the food and beverage sector in Rwanda

The development of food and beverage services in Rwanda is closely linked to the development of accommodation, where records documenting the development of the sector are scarce and sketchy (Mazimhaka, 2007; Ngenzi, 2009; Gitera, 2009). The numerous restaurants in the towns of Rwanda serve African cuisine and are mainly targeted at the working class of the country.

Restaurants that suit international tourists are mainly housed in hotels, and especially in Kigali (Ngenzi, 2009:50). In hotel restaurants a good choice of reasonably priced European, Indian, Italian and Middle Eastern dishes can be found. Ngezi also asserts that a fairly good selection of beers, wines and spirits is also available. Most of the spirits and wines and food served in the up-market hotels are imported. There is still room for the food and beverage industry of Rwanda to develop according to the Kigali Institute of Science and Technology (KIST, 2001:32).

2.4.5 The development of the entertainment and recreation sector in Rwanda

Rwanda attracts mainly the adventure tourist based on the nature of its main tourist product (gorilla tourism). More recently the concept of ecotourism which forms part of adventure tourism is the main selling attractions in Rwanda. In 2004 dependence on gorilla tourism had increased to 93% of total income (ORPTN 2005:3) and currently gorilla tourism earns 70% of the Rwanda tourism income (Ngenzi 2009:38). The reliance on gorilla tourism has its roots in the historical development of Rwanda and Africa as a whole, where the main attraction is the natural scenery and wildlife. Early explorers promoted Rwanda as tourist destination based on its unique geographical terrain and the existence of rare species of mountain gorillas.

Alongside gorilla tourism the thick forests of Rwanda in the north and western provinces make outdoor recreational activities like mountaineering, trekking, hiking, rock climbing, and canoeing available options, (Ndayis, 2010). There is however need to market these adventure and outdoor activities with the same magnitude as the Knysna Oyster Festival in the Western Cape Province of South Africa. Apart from adventure recreational options, the entertainment and leisure sector in Rwanda is limited and concentrated in Kigali according to Ngenzi (2009:51). The development of tourism has given rise to the commercialization of Rwanda's arts and culture to some extent. Traditional theatre groups, dancers and performing arts have since been entertaining tourists on various occasions, some of which are of national and traditional importance. The economic contribution of arts and cultures is not readily available.

Tourist shopping in Rwanda is mainly for artifacts and cannot compare with shopping in Dubai, Paris or Cape Town. Ngenzi (2009:51) also noted that though available active sports like golf and tennis are still underdeveloped and the facilities need improvement. The implication of the situation of outdoor recreation and entertainment in Rwanda is that the economic contribution of the entertainment and recreation sector to total tourism income is low and there is a still room for development. In other words development of a vast range of outdoor and recreational packages could be a way of diversifying the tourism product.

2.5 Development of the tourism sectors: provincial perspective

The Northern Province of Rwanda was created in January 2006 by the Government in an effort to decentralize authority and create local authority structures. Today the Northern Province comprises most of the former provinces of Byumba, Ruhengeri and northern parts of rural Kigali.

Byumba is the capital city of the Northern Province, which is also divided into five districts being Burera, Gakenke, Gicumbi, Musanze and Rulindo.

The development of tourism in the Northern Province of Rwanda is closely related to the work of early explorers and environmentalists who had interests in the volcanic mountains and the mountain gorillas that live there. The Virunga geography is comprised of undulating volcanic mountains at altitudes up to 4500m above sea level (ORPTN, 2004). The formation of the Albert National Park in 1925 gave new momentum to the early tourism industry of Rwanda. The flourishing settlements of Ruhengeri Town and Karisoke were the base of early researchers according to Ngenzi (2009:58). It was from these centres that tourists, researchers and environmentalists could get daily necessities and conveniences.

Ngenzi (2009: 59) noted that tourism in the northern region of Rwanda grew at a much faster rate than in any of the other regions, albeit slowly. He attributed the slow growth in tourism to the lack of local participation which led to activities like poaching and resistance to conservation efforts by local communities. The protracted political strife in Rwanda impacted heavily on the development of tourism in the Northern Province (Mazimhaka, 2007; Ngenzi, 2009; ORTPN, 2004), and the 1994 genocide impacted negatively on Rwanda as a destination by creating an image of an unsafe destination. Security ranks among the first three considerations in holiday destination choice according to World Travel and Tourism Council (WTTC: 2010). Close to two decades after the war a number of international markets still perceive Rwanda as an unsafe destination thereby impacting negatively on tourists' arrivals and receipts for Rwanda. However, the current government has made efforts to resuscitate the tourism industry of Rwanda, with the main selling point being the Northern Province among other strategies to diversify the tourism product and increase the economic benefits of tourism (Mazimhaka, 2007; ORPTN, 2004). Ngenzi (2009:73) maintains that today the Northern Province is the main tourist destination in Rwanda and a top earner of tourist revenue.

2.5.1 Development of the travel services sector in the Northern Province of Rwanda

Travel services in the Northern Provinces are offered by both local and international tour operators. Tour operator's main selling point is the Volcanoes Mountains and its mountain gorilla population. Local travel services companies operate mainly from Kigali, which borders the Northern Province. Byumba, the capital of the Northern Province, has a few operators and agencies that are struggling to compete with international tour operators (RTWG, 2002).

Strategic partnerships with international tour operators have assisted local tour operators, such as Volcanoes Safaris and Kiboko Tours and Travel, with their marketing expertise and customer databases. The travel services sector in the Northern Province is still in its infancy and needs to improve according to Ngenzi (2009:50). The size of the travel services sector in Rwanda has two economic implications these are that most of the income earned from selling the northern district is earned in Kigali and hardly reaches the North, and secondly the money that is earned by international tour operators in selling travel services to Rwanda does not benefit Rwanda or the Northern Province.

2.5.2 Development of the transportation sector in the Northern Province of Rwanda

The Musanze district, where this research was conducted is situated 118 kilometers from the Rwandan capital city, Kigali (Briggs and Booth, 2007:64); and is linked to the capital city by a paved road. The transport sector in the Northern Province of Rwanda is still underdeveloped and centres in this province are connected by road transport. Most towns are connected by paved roads but feeder roads are unpaved and are in a bad state. Road transport is divided into three categories, which are outlined below:

- Government taxi buses that are relatively new and are generally big, spacious and painted white. They only tend to cover the main bus routes such as Kigali- Musanze.
- Private taxi buses all look similar but are much smaller and usually with a yellow line along the middle. They open with sliding doors and offer a much more intimate experience as four people squeeze into a row and squash up tight to let more passengers on.
- Public motorbike, or “moto”

The following are the famous shared transport companies of the Northern Province as outlined by (Briggs and Booth, 2007: 64)

- Virunga Express
- Sotra
- Karisimbi
- Atraco
- Onatracom.

The first four transport companies are private, and the fifth a Government owned company. In addition to these companies there are self owned vehicles that are operational in the transport sector, benefits directly from usage by travelers and tourists. Local private owners of vehicles that are used to transport tourists, enjoys the full economic rewards of tourism in their trade.

2.5.3 Development of the accommodation sector in the Northern Province of Rwanda

The hotel industry of Rwanda is still in its infancy. Adequate hotels and lodges are mostly concentrated in Kigali, which is 60km away from Byumba, the capital of the Northern Province. Byumba is the home of the SOS Children's Village that offer quality accommodation to traveler and volunteers (Briggs and Booth, 2004). Reed (2002) noted that Government opened doors to international participation in accommodation through its foreign policy and privatization programs that started in 1996. The international operators that have been operating in Rwanda since 2001 include the French group Accor and the Libyan group Soprotel. Rwanda's plan is to build new high quality lodging facilities outside Kigali in six areas of tourism interest, that includes Ruhengeri in the Northern Province according to a United Nations conference report of 2006 (UNCTAD-ICC:2006). Privatization and the participation of multinational companies seeks to improve the quality and quantity of accommodation in Rwanda and more importantly to decentralize accommodation facilities from Kigali to other places, including the Northern Province which is well placed for development, with its tourism attractions. The Hotel Urumuli 15 project has shown the Government's commitment to improve accommodation facilities in the Northern Province. The economic benefits of the accommodation sector to the Northern Province include foreign currency, direct and indirect employment, and that the sector in this region can contribute to regional GNP. Critics are of a view that privatization of accommodation facilities in Rwanda has been slow and unsuccessful according to an internet source Xinhua news, (2010). This internet source added that very little money was earned in the privatization process and various hotels and guest houses earmarked for privatization remained unsold for unknown reasons.

2.5.4 Development of the food and beverage sector in the Northern Province of Rwanda

The development of food and beverage services in the Northern Province is linked to the development of urban areas. Kigali remains the centre of all activities commanding a leading role in both the number and variety of restaurants. Byumba, Ruhengeri and other major urban centers in the Northern Province have a limited selection of good restaurants. The problem is to establish the development of the food and beverage sector of this region as there is little documented information about the region outside Kigali. Adequate food and drink outlets are however available in stand-alone restaurants and in-house restaurants in lodgings establishments. Street vending and local catering entrepreneurs cater mainly for the local

working-class citizens and largely prepare ethnic dishes for their clients. For the adventure tourist, street restaurants could be an adventure in which they get to sample real African cuisine, although there is no food safety guarantee.

2.5.5 The development of the entertainment and recreation sector in the Northern Province of Rwanda

Entertainment and recreation in Rwanda is limited and confined to Kigali. In the Northern Province entertain and recreation takes the form of outdoor adventures like mountain climbing, trekking, local live bands on weekends and traditional performances. The Rwanda Tourism Group (RTWG) that was formed in 2005 noted that the entertainment sector need to improve and identified four areas that would assist the entertainment and leisure industry to grow in Rwanda. The four areas identified by the RTWG (2005) are:

- The creation of zoological and botanical gardens in major urban centers like Kigali, Byumba, Butare, and Ruhengeri, with a view to attract both the local public and tourists.
- The creation of water parks, with boating, leisure and sporting facilities on Lake Kivu.
- The creation of theme parks and a variety of cultural and entertainment centres in strategic regions of the country, including the Northern Province.
- Offering training in entertainment, leisure and hospitality to improve the human resource capital in these strategic sectors.

The Government of Rwanda has proved that it is committed to development of the entertainment and leisure industry of the Northern Province and the country at large with such zeal and energy that can be likened to that of the United Emirates States. The commitment is a good thing for the future of the entertainment and recreational sectors of the country in general and the Northern Province in particular.

2.6 Impacts of tourism on national economies

The impacts of tourism cannot be understated; in fact for both developed and less developed countries tourism is seen as the most feasible option for economic development and diversification from traditional industries like manufacturing and agriculture (Pompl and Lavery: 1993). It should be noted however that the impacts of tourism are twofold, there are massive positive impacts that can come from tourism, and by the same token, tourism can be a source of disastrous negative impacts both on the economy and the environment. Briedeman and Wickens (2003) note that while governments generally expect tourism to generate new employment opportunities for the youth, enhance community infrastructure, and assist in rejuvenating flagging national economies, in many recorded instances furustration has been witnessed

emanating from the paucity of the revenue, and the inequity in the distribution of tourism income, with these weighed against the perceived social and environmental costs of tourism

2.6.1 Measuring and interpreting tourism impacts on the economy

The impacts of tourism on the economy are measured in monetary terms. The World Travel and Tourism Council (WTTC) is a research body created by the United Nation World Tourism Organisation to measure and publish tourism economic impacts using standard accounting procedures. It helps member nations to measure their performance in travel and tourism. WTTC use the total contribution of travel and tourism, including its wider impacts on the economy. The WTTC measure such indicators as:

- Direct contribution- contribution of travel and tourism to the Gross National Product from strictly travel and tourism activities.
- Total contribution - contribution of travel and tourism to the Gross National Product from travel and tourism activities including income generated from supportive industries.
- Employment; direct contribution- employment created strictly within the tourism and travel industry.
- Employment: total contribution- employment created within the tourism and travel industry, including other industries that support the travel and tourism industry like security, construction and infrastructural development.
- Visitor Exports- total income generated from outbound tourism
- Investment- total expenditure by government and the private sector to goods, services and infrastructure that supports tourism.

The WTTC, in conjunction with national governments, measures the economic impacts of tourism on an annual basis. The results of 181 member-nations are also published annually with detailed reports on progress and recommendations on how to improve.

2.6.2 Global impacts of tourism: A Comparative Analysis of Tourism happening and not happening

Tourism contributes significantly to the global economy. The World Travel and Tourism Council (WTTC, 2010:12) asserts that tourism is the largest industry in the world, employing over 235 million people and generating 9.4% of global GDP in 2009. The economic benefits of tourism include; increase in foreign currency earnings, job creation, direct foreign investments, development in infrastructure, commercialization of local arts and culture becomes possible, and local entrepreneurship is promoted as local small-scale business people benefit from visitors

purchasing goods, curios, local artifacts and daily conveniences. Presently, the tourism industry with its eight sectors has become the largest and the fastest growing industry in the world. According to UNWTO World Tourism Barometer (2009) tourism earnings reached a record US\$856 billion in 2007, an increase of 5.6% from 2006. The financial crisis in the USA, and subsequent melt-down in Europe, slowed the momentum from 2008 to date. Forecasts made by the UNWTO World Tourism Barometer for the transport sector for 2010 were US\$165 billions which, when added to the US\$856 billion amounts to US\$1 trillion in international tourists' receipts. Employment in the tourism industry reached 235million people in 2009 according to the WTTC (2010:13).

To see the impact of tourism to the global economy clearly, it is important to look at what happens when tourism is disturbed by a natural disasters, war or civil unrest. In Zimbabwe, and recently Egypt (2011) millions of dollars were lost due to political instability. The Japanese and Haiti earthquakes resulted in massive cancellations of trips that resulted in massive loss of revenue. Japanese tourists to the United States are among the top visitors in the world. Tourism between Japan and Hawaii comprise 20% of Japanese travel. The Japanese earthquake and tsunami resulted in US\$ 2billion decline in tourism from Japan in 2011.

The ripple effects of non-performance of tourism due to whatever reason are disastrous to the global economy. For example the Japanese earthquake and tsunami affected the global community via tourism as outlined below:

- According to the International Air Transport Association, IATA, air travel went down from March 2011 as a result of the Japanese natural disaster. Premium travel declined by seven percent globally since the Japanese market makes 7-8% of the global market.
- Thailand recorded massive losses in tourism receipts
- Thousands of trips were cancelled between India and Japan, countries that share good business trips.
- New Zealand, Japan's 4th largest partner, recorded massive losses in business travel.
- Australia's Queensland region suffered from the crisis, after experiencing a 12% increase in Japanese tourists in 2010. Japan is the 5th largest inbound group of tourists to Australia.
- Nepal's tourism is expected to be down with many Japanese cancelling trips to Nepal.
- Indonesia recorded much lower tourism numbers to and from Japan.

The global economy experienced tourism and its ripple affects economic repercussions from the Japan earthquake, tsunami, and general devastation.

When tourism is positive the globally economy is boosted and national economies benefit according to evidence from the Department of Tourism Report for 2011 in South Africa. The FIFA World Cup assisted South Africa to maintain the highest growth in tourism's GDP contribution globally at 13%, compared to Australia's 12%, despite that country's lower than

expected tourist volumes in 2010.(Department of Tourism Report: 2011) However, the other four countries are outperformed by Brazil, where tourism contributed 24% to GDP (Department of Tourism Report, 2011:11) Overseas tourism to South Africa still generates a larger tourism spend than the domestic market, and thus the dependence on foreign visitor arrivals renders the industry vulnerable and should be compared with, for example, Brazil, where domestic tourism is by far the largest component and spend. Brazil and Thailand had relatively high direct employment creation/tourist numbers, at 2,2 million and 1,9 million respectively in 2008. Comparatively, South Africa recorded a total of 439 000 direct job opportunities provided, and 4% growth between 2003 and 2008. In the same period, Australia recorded 0% growth in jobs, and generated 499 000 direct jobs.

Latest economic impact research shows that the global travel and tourism industry will grow more slowly in 2011 and 2012 than previously forecast. However, global travel and tourism is expected to grow by an average 4% per year between 2011 and 2021. This is down marginally from the 4.3% for the same period that was forecast earlier in the year, with the decline due almost exclusively to the downward revisions in 2011 and 2012. By 2021 travel and tourism is predicted to account for 69 million more jobs– almost 80% of which will be in Asia, Latin America, the Middle East and Africa (WTTC, 2011:2)

2.6.3 Economic Impact of Tourism in Africa

The WTTC Report (2011:3) revealed that direct tourism receipts in Africa contributed 5.3% to total GNP, and 5.3% of total contribution; direct employment was pegged at 2.7%, a value of 7 806 000 jobs expected to rise to 10 203 000 jobs by year 2021. The total contribution of the industry to employment, including indirect employment was pegged at 18 173 000. Visitor exports generated US\$ 53.4billion and forecasts for 2021 were pegged at US\$ 92, 5billion. Total investment for infrastructure and expansion projects for tourism in Africa were pegged at 5, 6% of all total investments in developmental projects across Africa (WTTC, 2011:3)

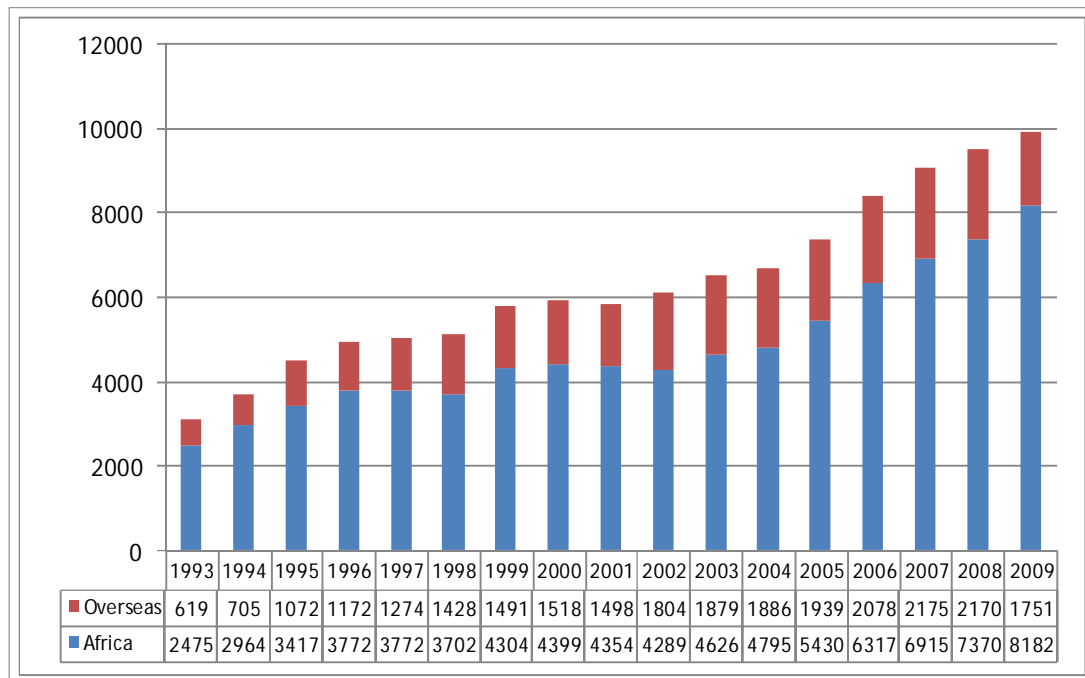
2.6.4 Impacts of tourism in southern Africa. The South African Example

South Africa is a good example to discuss the potential of tourism in Africa because of its popularity in tourism (Naude & Saayman, 2005; Ferreira & Harmse, 2000) Rooted at the southernmost tip of Africa, the country receives millions of long-haul visitors from all over the world. Tourism contributes enormously the national GDP of the economy. The contribution of

tourism and the distribution of the proceeds of tourism income improve the life standards of citizens and contribute to social well-being and stability. According to a report released by the Department of Tourism (2011:8), South Africans are generally satisfied with the Government's performance and prioritization of tourism as an economic driving force since the country attained independence in 1994. This in part goes a long way to reinforcing the fact that apart from economic benefits, tourism can act as a uniting force both on a national and global level. To further confirm the sentiments propounded above, the Government of South Africa, under the leadership of President Jacob Zuma in 2009, further acknowledged the importance of tourism by the establishment of a stand-alone Ministry of Tourism which is a key indicator that the Government recognizes that tourism is a growth-driving activity (Department of Tourism: 2011:8).

Regional and domestic tourism plays an important role in the economy of South Africa. In 2008 for example, 33 million trips were recorded as domestic tourism, and in 2009 30million trips were taken, a decline of 8% caused by the world financial crisis that officially hit South Africans in 2009, according to the Department of Tourism Report (2011:10). The report also indicates that domestic tourism contributed R224 billion in to the country's economy. Regional tourism also plays a vital role in the economy of South Africa. Despite the fact that South Africa is located far from major source markets, which are the European, American and Asian markets, the country continues to receive ever-increasing visitor numbers as shown by figure 2.6 below:

Figure 2.1: Annual visitor arrivals for overseas markets compared to Africa (in thousands)



Source: WTTC: 2011. Travel and Tourism Economic Impact. Africa 2011

Overseas arrivals were at 1,751 million in 2009, indicating a slight decrease compared to 2008, however the African market increased tremendously in 2009 to a total of 8,182 million compared to 7,370 million (Department of Tourism Report: 2011:10). These figures increased with the 2010 FIFA World Cup competition that was hosted by South Africa. Official figures of the impacts of the event were not out at the time of this research; however the country witnessed massive infrastructural upgrading that included stadiums, airports, road and telecommunication networks and all these contributed to the creation of jobs. The Department of Tourism Report (2011) revealed that publicity and improved awareness about the country as a result of the Confederations' Cup and the 2010 FIFA World Cup competition are expected to boost the country's tourism industry beyond 2014.

2.6.5 Impacts of tourism in Central and East Africa. Kenyan Example

Tourism has been the lifeline for two stable East African countries, Kenya and Tanzania. The results for 2010 that were released by the WTTC (2011) show the following results:

- Tourism direct contribution to GDP was recorded at KES124.0bn which represents 4.5% of total GDP. Forecasts for 2011 expects a rise of 4.7% pa to KES 195.9bn (4.6%) in 2021 (in constant 2011 prices).
- The total contribution of travel and tourism to GDP, including its wider economic impacts, is forecast to rise by 4.6% pa from KES315.2bn (11.4% of GDP) in 2011 to KES 492.7bn (11.6%) by 2021.
- Travel and tourism was expected to support directly 245,000 jobs (3.8% of total employment) in 2011, rising by 2.4% pa to 312,000 jobs (3.9%) by 2021.
- The total contribution of travel and tourism to employment, including jobs indirectly supported by the industry, is forecast to rise by 2.3% pa from 643,000 jobs (9.9% of total employment) in 2011 to 807,000 jobs (10.1%) by 2021.
- Travel and tourism visitor exports are expected to generate KES110.9bn (14.3% of total exports) in 2011, growing by 10.1% pa (in nominal terms) to KES176.9bn (11.6%) in 2021.
- Travel and tourism investment was estimated at KES39.2bn or 7.2% of total investment in 2011. It should rise by 4.7% pa to reach KES62.0bn (or 7.4%) of total investment in 2021.

In 2010 Kenya's tourism experienced significant growth after two years of poor performance caused by the 2008 post-election political violence, and the 2009 global financial crisis in the USA (Euromonitor Report: 2011). According to the Report, towards the end of 2009 tourism recorded huge gains as coastal hotels began to record occupancy levels of 100% from both domestic and international tourists. Accommodation capacity in the peak season on Kenya's coastal hotels failed to meet demand in 2010. The main attraction in Kenya is wildlife; the popular safari tours pronounced a real African jungle experience to most overseas tourists. Safari tourism contributes significantly to Kenya's GDP and has assisted in the preservation of the environment through eco-tourism. Experiencing mass tourism in the 1990s, Kenya started to experience some environmental problems and the Government had to resort to eco-tourism to protect and preserve the environment's precious resources for sustainable development. (Euromonitor Report: 2011) This means that generations and generations will continue to benefit from responsible tourism development in Kenya. According to the Euromonitor Report (2011), the 2010 Lamu Cultural festival in November 2010 was a success. The 10th anniversary of the Lamu Cultural Festival was organised to popularise and preserve the Lamu tradition and culture. Occupancy levels in the accommodation sector in the local town and surroundings were at 100% during the festival. The Lamu Cultural Festival set a good example resulting in various groups in

Kenya coming forward with plans and budgets to host their own cultural festivals, as noted by one held by the Abaluhya and the Gusii on the coast recently, both attracting large numbers of domestic tourists. The inclination is to popularise such festivities to the international market to such a magnitude as the January Coon Carnival in Cape Town in South Africa.

2.6.6 Impacts of tourism in Northern Africa. The Moroccan Example

Morocco is a North African country strategically located to the European source markets of tourism. Travel between Morocco and Europe and America is short and relatively inexpensive compared to travelling to countries like South Africa, Brazil and Australia. Recognizing this advantage the Moroccan Government has over the years demonstrated a strong commitment to promote tourism as it is one of the major economic drivers of the economy. In 2010, 9million international tourists visited Morocco, the majority of whom are from the European Union (EU) block which is just across the ocean. Vision 2010 was the first tourism development strategy that drove tourism development in Morocco and recorded major success like the Plan Azur in which vast luxury property developments along Morocco's coastal region were built.

The pursuit of tourism development puts pressure on governments to make economically sound decisions. In Morocco for example, the desire to benefit from tourism growth made the Government to liberalize its air transport industry. An open-skies policy lured low cost airlines to Morocco, including Easyjet, Rynair and Air Arabia, among others. Entry of these airlines created new jobs and increased visitors to the country; therefore the tourism economic multiplier effect was experienced.

A report released in 2011 by the WTTC reveals that for 2010, the direct contribution of tourism to GDP was estimated at Moroccan dirham 24.2billion, which represent 9, 1% of total GDP. Forecasts show that tourism direct contribution will rise by 6.2% per annum to MAD135, 9billion by 2021. A brief outlook of the impact of tourism as provided by the WTTC (2011) is listed below:

Total Contribution to GDP

The total contribution of travel and tourism to GDP, including its wider economic impacts, is forecast to rise by 5.7% pa from MAD159.3bn (19.5% of GDP) in 2011 to MAD278.2bn (21.6%) by 2021.

Employment: Direct Contribution

Travel and tourism is expected to support directly 918,000 jobs (8.0% of total employment) in 2011, rising by 3.6% pa to 1,314,000 jobs (9.4%) by 2021.

Employment: Total Contribution

The total contribution of travel and tourism to employment, including jobs indirectly supported by the industry, is forecast to rise by 3.1% pa from 2,001,000 jobs (17.3% of total employment) in 2011 to 2,711,000 jobs (19.5%) by 2021.

Visitor Exports

Travel and tourism visitor exports are expected to generate MAD 74.6bn (26.3% of total exports) in 2011, growing by 9.3%pa (in nominal terms) to MAD 142.7bn (25.7%) in 2021.

Investment

Travel and tourism investment is estimated at MAD 28.5bn or 11.4% of total investment in 2011. This should rise by 4.8% pa to reach MAD45.4bn (or 11.4%) of total investment in 2021.

The results and the forecast above are encouraging. In fact the Moroccan Government has made significant plans under Vision 2020 to drive the tourism industry to new heights. The emphasis is on luxury at budget prices. The instability in the region, started by the Tunisia uprising has been a drawback, but the future looks bright as tourism products command a better priced as compared to competitors in Europe and the Middle East. Morocco is also set to be a Spa destination, and religious and cultural destination, further diversifying its tourism products under vision 2020 according to Euromonitor (2011). A number of large projects are in the pipeline in Morocco tourism plans which will see continued growth of tourism in Morocco.

2.7 Summary

Tourism is the fastest growing industry in the world, and the most attractive economic strategy for third world countries like Rwanda to diversify their poor economies and create jobs for the

people. Tourism in Rwanda is still in its infancy and most of its sectors need to improve in order to make meaningful contributions to the economy and the economic welfare of the ordinary Rwandese. Trade and colonization have influenced the development of tourism in Rwanda, and since then, succeeding governments in independent Rwanda have continued the tourism route as its economic impacts are felt. Gorilla tourism is central to the development of tourism in Rwanda and earns the country foreign currency making a significant contribution to the regional and national GDP. All the tourism sectors of Rwanda's tourism need to improve, more particularly the tourism services sector and entertainment. Tourism services sector needs to increase the visibility of Rwanda on the world tourism market by branding Rwanda positively, designing and marketing innovative tourism products that can complement the current limited entertainment options in the country. The distribution of tourism income also needs to make meaningful economic impacts for the ordinary Rwandan. This chapter has discussed the development of tourism from a world perspective, to the provincial and finally local levels. In chapter 3 the research methodology for this research is discussed.

CHAPTER THREE RESEARCH METHODOLOGY

3.1 Introduction

This chapter presents and discusses the methodology that was adopted to effectively and efficiently achieve the following stated objectives:

- To identify the **benefits** of tourism's economic development to the Northern Province and its people.
- To identify the main **stakeholders** in the tourism development in the Northern Province of Rwanda.
- To determine the importance of **tourism proceeds** to the tourism economic development of the Northern Province and its people.
- To identify the main **beneficiaries** of tourism proceeds in the Northern Province of Rwanda.
- To ascertain the **distribution** of tourism income in the Northern Province of Rwanda.
- To identify the main **challenges** to tourism economic development in the Northern Province of Rwanda.

Emphasis is placed on the research design, the sample sizing, the procedures and methods that were used in data collection, while research ethics were also adhered to. The instruments and measures which were utilised and the techniques to analyse the collected data, are also expanded on in this chapter.

3.2 Tourism growth in Rwanda versus Tourism research

According to the Africa Research Bulletin (2011:1891), the Rwanda Development Board (RDB) for Tourism and Conservation released tourism arrivals and related data for the year 2010. Tourism receipts for the country were over US\$200m up by over 14% compared to the year 2009 and 7% ahead of the projected earnings. This makes tourism one of the leading economic sectors in Rwanda.

The RDB also confirmed that in 2010 over 660,000 tourists visited Rwanda, and expected new airline connections will undoubtedly make further impact in 2011 (p.1891), a year in which a new record is expected to be attained.

RDB sources attributed the success of 2010 in great part to the ongoing diversification of the country's tourism product, and while gorilla tracking remains the number one activity, the opening of the Nyungwe National Park and the Nyungwe Forest Lodge also made an impact on the sector's performance.

For 2011, RDB plans the establishment of birding trails outside the traditional national parks to relieve the pressure on accommodation near the main parks, and investors wishing to put up, new lodges and resorts have been encouraged to contact RDB for available sites.

In an interview with Business Times, Kigali, the head of Tourism and Conservation at RDB Rwigamba, said a new canopy walk and “a unique interactive interpretation centre was unveiled in Nyungwe and is now operational,” adding that visitors to the Park rose by 18%.

The Africa Research Bulletin (2011) continued confirming that the population of mountain gorillas has raised by 26.3% over the last seven years, with an annual 3.7% growth, according to a gorilla census conducted in April 2010. Statistics suggest that leisure tourists accounted for 46% of the total visitors, while business travelers make up 41%. Despite the boom, Rwigamba said, the sector is still challenged with limited capacity in the private sector, which is affecting the service in the hospitality sector.

The New Times pointed out meanwhile that Rwanda had been ranked among the top five emerging destinations during the 2011. It is the only African country named in the top five by the British travel magazine in the worldwide poll.

Based on what is written and confirmed by the RDB, tourism in Rwanda had a successful 2010 year, exceeding its target by several percentage points. It is excellent, but the success of the tourism industry has to go parallel with researches aiming to find out the economic impact of such success on local communities, especially those located near tourist attractions. This research is therefore one of the few, if not the only one, that analyses the economic development impact of tourism as a growing industry in the Northern Province (home of mountain gorillas) as the most preferred tourist area in Rwanda.

3.3 Qualitative research versus Quantitative research

Research basically means the application of scientific methods in finding out the truth concerning a given phenomena (Zikmund and Babin, 2007:5). These scientific methods can categorised into two broad categories:

- Qualitative, and
- Quantitative.

These two research methods are different and their differences are discussed below.

3.3.1 Quantitative method as a preferred research method for this research

This research method allows researchers to make use of an objective approach, deductive reasoning and the research can be generalised and utilises numbers. This research method is a means to test theories by examining their relationship among variables, where the variables, in turn can be measured on instruments, so the numbered data can be analysed using statistical procedures (Creswell, 2009:4). As far as this research is concerned, the relationship between two variables was a concern:

- Variable one is tourism economic development (independent variable), and
- The second is local people in the Northern Province of Rwanda (dependent variable).
- The relationship that is to be found is the impact of tourism development on local people in the Northern Province of Rwanda, where
- The numbered data were analysed using statistical software known as Statistical Package for Social Sciences version 18.

In brief, the quantitative method aims to determine how one thing (independent variable) affects another (dependent variable) in a population by quantifying the relationships between those two variables.

3.3.2 Qualitative method

According to Denscombe (2008:333) qualitative research is an umbrella term that covers a variety of approaches to social research, drawing on disciplines such as sociology, social anthropology and social psychology. These approaches have the following in common:

- The use of text and images as their basic data.
- An interpretive approach that sees knowledge as socially constructed.
- A concern with meanings and the way people perceive things
- An interest in the activities of social groups, and
- An interest in patterns of behaviour

Alitinay and Paraskevas (2008:75) explain that qualitative research aims to develop an understanding of the context in which phenomena and behaviours take place. It focuses mainly on experiences and emotions and is designed to be probing in nature. Qualitative data is usually in text form, and offers a richer, more in-depth representation of people's attitudes, experiences and beliefs. Creswell (2008:4) explains that qualitative research is a means to explore and understand individuals or groups that have a social or human problem. The process involves emerging questions and procedures, which are in the form of data which is typically collected in the participant's setting, as well as data analysis inductively built from particulars to generate

themes, while the researcher interprets meanings of the data. The qualitative method was not used in this research study.

3.3.3 Advantages of quantitative method versus disadvantages of qualitative method

Johnson and Omwuegbuzie (2004:19) assert that the quantitative method affords the research an opportunity to test and validate already constructed theories about how phenomena occur. The researcher can create a situation that eliminates the confounding influences of many variables. In this way cause and effect relationships could be credibly and easily established. On the other hand Zikmund and Bobin (2007:83) assert that qualitative research method have certain disadvantages. The information that is produced may be too abstract and general for direct application to specific local situations, contexts and individuals.

The following table shows the advantages of quantitative method as asserted by Johnson and Omwuegbuzie and disadvantages of qualitative method as asserted by Zikmund and Babin.

Table 3.1 Advantages of quantitative method versus disadvantages of qualitative method

Advantages of Quantitative method	Disadvantages of Qualitative method
In situations where we have to know “how much/many or how often”	Research results are highly subjective. The research results are dependent on the interpretation of the researcher. High involve of the researcher in all aspects of the research makes results less objective and prone to bias. These methods can be used for lobbying or to advance preconceived ideas therefore lack scientific objective.
Where there is need to come up with model, theories and hypothesis	Qualitative methods are usually expensive in terms of both money and time. For example, to hold focus group there is need to hire appropriate conferencing facilities, set up sound and vision equipment, arrange for refreshments for the respondents and in some instances respondents are paid for their participation in focus group. In-as a depth interviews need a lot of time to execute.
In experimental control and manipulation	Since there is high involvement of the researcher in all aspects of the research it therefore implies that there is need for a trained researcher. In focus groups for example there is need for a person with public presentation skills, good social etiquette, excellent moderating skills and the results must be interpreted by a professional.. Some of the skills that are needed in qualitative research are purely skills that are not taught in the formal researchers overall professional and personal skills.
To profile target audience by determining what proportion of the audience possesses articular attitudes, behavioural traits, behavioural intentions and whether some specific determinants predict behaviours that are statistically important	Results from qualitative research are not very useful for operational management where figures/numbers matter more than mere descriptions and explanations.

Source; Adapted from Johnson and Omwuegbuzie (2004:19) and Zikmund and Babin (2007:83)

3.4 Research design

This research used both documentary and empirical research. Documentary research concentrated on available literature, adopted a detailed analysis and inspected the economic development of each of the following sub sectors of the tourism industry:

- Accommodation
- Travel Services
- Food and Beverage
- Transportation
- Recreation and Entrainment in the Northern Province of Rwanda as a province in Rwanda.

Empirical research adopted concise, clear and understandable written questionnaires to gather data related to the economic development in the Northern Province of Rwanda; three different types of respondents were taken into consideration namely:

- Tourists as respondents
- Tourism business owners/managers as respondents
- Rwanda Development Board/Tourism and Conservation as respondents.

Questionnaires were designed in English and comprised both quantitative and qualitative questions, and were developed to establish the economic development of the Northern Province of Rwanda.

3.4.1 Tourists as respondents

The first questionnaire considered tourists as respondents where tourists in the Northern Province were given questionnaires that were completed under the guidance of the researcher or research assistant. Respondents were given an introduction regarding the research, which comprised:

- The purpose of the research
- The reason why they were chosen as respondent
- The confidentiality of data
- Instructions on how to complete the questionnaire
- Contact information of the researcher.

The questionnaire comprised four sections:

- Demographic characteristics of respondents; with five (5) questions under this section which probed age, gender, origin, level of education and monthly income.
- Destination choices had four (4) questions and two (2) sub-questions, regarding purpose of visit, source of information, advice to others to visit the Northern Province, and the possibility of returning to the destination.
- Tourists' contribution to tourism economic development; this section comprised four (4) questions and four (4) sub-questions, regarding how the visit was arranged, types of accommodation and length of stay, and the expenses for each service in each sub-sector of tourism.
- Overall tourism economic development; this section comprised five (5) questions and two (2) sub-questions. This section probed levels of satisfaction for services obtained from all tourism sub-sectors, recommendations concerning development of the tourism industry in the Northern Province, means of transport, port of entry and overall impression in terms of friendliness, helpfulness, customer care. In addition to these four sections, two spaces were provided for comments regarding the research and another for e-mail responses to the research. Only tourists in the Northern Province qualified as respondents.

3.4.2 Tourism business owners/managers as respondents

The second questionnaire considered tourism business owners, managers, or any other person representing tourism business entities in the Northern Province of Rwanda as respondents. They were provided with questionnaires on the Northern Province, that were completed under the guidance of the researcher or research assistant. Respondents were given an introduction regarding the research, which dealt with:

- The purpose of the research
- The reason why they were chosen as respondents
- The confidentiality of data
- The instruction on how to complete in the questionnaire
- Contact information of the researcher.

The questionnaire comprised three sections:

- Respondents and business characteristics; four (4) questions and one (1) sub question under this section probed the position occupied by the respondent in the business, the main business/tourism sub-sector of the business, the business length of existence and the size of the business.
- Tourism economic development; six (6) questions and eleven (11) sub-questions under this section probed the number of employees for the current year compared to the number of employees in the first year of existence, the total number of employees originally from the Northern Province, the monthly turnover compared to the turnover in the first year of existence, and the average monthly number of clients this year compared with the number of clients in the first year of existence.
- Overall tourism economic development; nine (9) questions and six (6) sub-questions under this section probed the rate of the business's profitability, others benefiting from the profit of the business, the overall status of tourism development in the Northern Province, the number of tourists, average expenses of tourists per day per service obtained from any tourism sub-sector, the average time spent at a destination, the perceptions on the efforts of the government to develop the tourism industry, and recommendations for tourism planners or developers. In addition to these four parts, two spaces were provided for comments regarding the research and another for e-mail responses to the research. Only business owners/managers in the Northern Province qualified as respondents.

3.4.3 Rwanda Development Board/Tourism and Conservation as respondents

The third questionnaire considered the Rwanda Development Board/ Tourism and Conservation as respondent. A questionnaire was provided to the Rwanda Development Board/Tourism and Conservation employees at its branch located in the Northern Province. Rwanda Development Board/ Tourism and Conservation is a department that conserves the rich biodiversity of the protected areas, and develops sustainable tourism in collaboration with stakeholders for the

benefit of all Rwandan people. The respondents were given an introduction regarding the research, which comprised:

- The purpose of the research
- The reason why they were chosen as respondents
- The confidentiality of data
- Instruction on how to complete in the questionnaire
- Contact information of the researcher.

The questionnaire comprised five (5) sections:

- Demographic characteristics of tourists; this section comprised four (4) questions, which probed age, gender, origin and level of education of the majority of tourists that visit the Volcano National Park.
- Destination choices had two (2) questions, which probed preferred attractions visited, the length of stay of most tourists, and the type of accommodation.
- Tourism's contribution to economic development; this section comprised eleven (11) questions, which probed the arrangement of the package, the maximum number of tourists in the Volcano National Park per day, the cost of visiting different attractions for both domestic and international tourists, projects in which the Rwanda Development Board/Tourism and Conservation Department is involved for the benefit of local people, the total number of employees originally from the Northern Province, the monthly turnover, and the average monthly number of tourists.
- Tourist trends; this section comprised two (2) questions which probed tourist trends when visiting the Volcano National Park between 1995 and 2010, and the trend of tourists coming to see the mountain gorillas tracking from 1995 to 2010.
- Overall tourism economic development; this section had two (2) questions and five (5) sub questions, which probed the profitability of the organisation, others who benefit from the organisation's profitability, and the rate of the organisation's efforts to promote the economic development in the region. In addition to these five sections, two spaces were provided for comments regarding the research and another for e-mail responses to the research.

3.5 Sample size

3.5.1 Tourists as respondents

A total number of two hundred and fifty (250) surveys were distributed to tourists in the Northern Province. Questionnaires were distributed in the following manner:

- At the reception of the Rwanda Development Board/Tourism and Conservation Department in the Northern Province. Receptionists acted as research assistants.
- At the reception of different accommodation establishments in the Northern Province. Receptionists acted as research assistants.
- Other questionnaires were distributed to tour guides at tour operating companies in the Northern Province, and the tour guides acted as research assistants. From a total of two hundred and fifty (250) surveys that were distributed, two hundred and thirty two (232) responses were properly completed and eighteen (18) surveys were cancelled because thirteen (13) of them were partially completed and five (5) were not submitted at all.

3.5.2 Tourism business owners/managers as respondents

A total number of sixty (60) surveys were distributed at tourism business entities that operate in the Northern Province of Rwanda. Surveys were given to tourism business owners or managers, who were given three (3) days to complete the questionnaires. The researcher collected them after three (3) days. Surveys were distributed in five (5) tourism sub-sectors in the following manner:

Table 3.2 Data collection (tourism business entities owners or managers as respondents)

Tourism business entities as respondents	Number of surveys distributed	Number of surveys collected	Number of surveys cancelled
Travel services	12	12	0
Transportation	12	12	0
Accommodation	12	12	0
Food and Beverage	12	12	0
Entertainment and recreation	12	10	2
Total	60	58	2

Summary:

- Twelve (12) surveys were distributed to owners/managers in the travel services sector; all of them were properly completed, therefore meeting an objective of this study;
- Twelve (12) surveys were distributed to owners/managers in the accommodation sector and were properly completed, therefore meeting an objective of this study;
- Twelve (12) surveys were distributed in the transportation sector, which were properly completed, therefore meeting an objective if this study;
- Twelve (12) surveys were distributed to owners/managers in the food and beverage sector, which were properly completed, therefore meeting an objective of this study.

- Twelve (12) survey were distributed in the recreation and entrainment sector, and ten (10) were properly completed therefore, meeting an objective of this study. Two (2) surveys were cancelled because they were not returned.

3.5.3 Rwanda Development Board/Tourism and Conservation as respondents

One survey was distributed and was collected from the Rwanda Development Board /Tourism and Conservation office in the Northern Province of Rwanda.

Table 3.3 Data collection summary

Type of survey	Number of surveys distributed	Percentage	Number of surveys collected	Percentage	Number of surveys cancelled	Percentage
Tourists as respondents	250	100%	232	92.8%	18	7.2%
Tourism business entities as respondents	60	100%	58	96.6%	2	3.4
Tourism Organising Board as respondent	1	100%	1	100%	0	0%
Total	311	100%	291	93.6%	20	6.4%

The above table can be explained in the following way:

- Of the two hundred and fifty (250) surveys that were distributed to tourists, two hundred and thirty two (232) responses were properly completed, and eighteen (18) were cancelled.
- Sixty (60) surveys were distributed at tourism business entities, and fifty eight (58) responses were properly completed, and two (2) surveys were cancelled.
- One survey was distributed and properly completed by the Rwanda Development Board /Tourism and Conservation.

3.6 Data collection procedures and methods used

Three hundred and eleven (311) questionnaires were distributed; two hundred and fifty (250) questionnaires to tourists in the Northern Province of Rwanda; sixty questionnaires to owners or managers of different tourism business entities in the following order:

- Twelve questionnaires in the travel services sub sector.

- Twelve questionnaires in the transportation sub sector.
- Twelve questionnaires in the accommodation sub sector.
- Twelve questionnaires in the food and beverage services sub sector.
- Twelve questionnaires in the entertainment and recreation sub sector.

Owners or managers of the tourism business entities were approached, and completed the questionnaires with the assistance of the researcher or an assistant researcher. One questionnaire was completed by an official at the Rwanda Development Board / Tourism and Conservation Department in the Northern Province of Rwanda. Data was collected within a period of 26 days between 8th December 2010 and 4th January 2011.

3.7 Instruments and measures used

The process for collecting data began with a consent letter which was written by the Head of Tourism and Conservation at the Rwanda Development Board. The letter served as approval and an agreement with the researcher to conduct the research, and as a welcome and promise of full co-operation with the Tourism and Conservation Department in the Rwanda Development Board. The researcher lived in Ruhengeri Town between 8th December 2010 and 28th December 2010; and in Byumba from 29th December 2010 to 4th January 2011. These are two towns in the Northern Province where one finds tourism business entities. Questionnaires were left with receptionists after explanations and clarifications of the questions so that they could distribute, and assist tourists, to respond. Receptionists were chosen as research assistants as they could access tourists easily.

3.8 Ethical considerations

This research does not have significant ethical considerations since it does not involve persons as a subject. However, the researcher informed all the respondents that the study was purely for academic purposes and that he did not represent any Rwandan organ. Detailed information about the research and its objectives were explained before respondents completed the questionnaire, and included important guidelines such as the following:

- Informing participants that their participation is voluntary.
- Informing participants that they may withdraw from the research at any time and for any reason.
- Giving participants the option of omitting questions they do not want to answer.
- Telling participants that their data will be treated in the strictest confidence and that, if published, they will not be identifiable.

3.9 Data Analysis

The data from the questionnaires is presented in combination with existing literature. As far as primary data is concerned, this was placed on an excel spreadsheet and was coded by the programme Statistical Package for Social Sciences (SPSS version 18.0). This software analysed the data, while appropriate frequencies were produced in the form of tables.

3.10 Summary

In brief, this third chapter provided answers regarding the following basic information gathering: who did what, when, where, how and what was the output. Data was gathered by the researcher and research assistants, between 8th December 2010 and 4th January 2011 in the Northern Province of Rwanda, by means of questionnaires that were used as research instruments. From the three hundred and eleven (311) questionnaires that were distributed, two hundred and ninety one (291) questionnaires were properly completed, representing 93.6% response rate. Twenty (20) questionnaires were cancelled, representing 6.4% of the total number of questionnaires that were distributed. The following chapter presents data analyses and discussion of the research results.

CHAPTER FOUR DATA PRESENTATION AND ANALYSIS

4.1 Introduction

This chapter presents and analyses the results obtained from the three types of completed questionnaires. Data collected is presented and analysed, respectively, in the following way:

- Part one presents and analyses views from tourists in the Northern Province of Rwanda. Of the two hundred and fifty (250) questionnaires distributed, a total of two hundred and thirty two (232) were considered for analysis. This is a response rate of 92.8%;
- Part two presents and analyses views from owners/managers of tourism business entities that are located in the Northern Province of Rwanda. Of the sixty (60) questionnaires distributed, a total of fifty eight (58) were considered for analysis, which represents a response rate of 96.6%; and
- Part three presents and analyses views from the Rwanda Development Board/Tourism and Conservation. One (1) questionnaire was distributed and was considered for analysis. This is a 100% response rate.

In summary, of three hundred and eleven (311) questionnaires distributed a total of two hundred and ninety one (291) were considered for analysis. This is an overall response rate of 93.6%. The frequencies were obtained by using the Statistical Package for Social Sciences (SPSS) version 18.0. To analyse frequencies, each question was considered and the results are presented in tabular form and analysed below.

4.2 Part one: Tourists as respondents

This research considered tourists in the Northern Province of Rwanda as respondents with the aim of knowing their group ages, the destination choices, their contributions to tourism economic development and their perceptions concerning the overall tourism economic development in the Northern Province of Rwanda.

4.2.1 Demographic characteristics of respondents

4.2.1.1 Age

In terms of the research topic, namely tourism economic development, it was necessary to identify the age group of tourists because the difference between ages determines the needs and purpose of a visit. It is significant for tourism planners/developers in the Northern Province to know the age group of tourists in the Northern Province of Rwanda.

Table 4.1: Age group of tourist respondents (n=232)

Age	Number of respondents	Percentage (%)	Valid Percentage (%)	Cumulative Percentage (%)
20	1	.4	.4	.4
21-30	21	9.1	9.1	9.5
31-40	104	44.8	44.8	54.3
41-50	82	35.3	35.3	89.7
51-60	19	8.2	8.2	97.8
61-70	5	2.2	2.2	100.0
Total	232	100.0	100.0	

Analysis of the results

Table 4.1 shows that the highest number of respondents was in the age group of 31 to 40 years representing 44.8%, while the lowest number of respondents was 20 years, representing 4%, following tourist respondents in the age group of 61-70 representing 2.2 %. This age group represents young adults earning a living and in a position to offer meaningful advice. This could be significant for tourism developers.

4.2.1.2 Gender

Understanding gender differences in the consumption of tourism products and services in the Northern Province is important for tourism planners/developers in order to identify their respective needs, serve and satisfy them.

Table 4.2 Gender demographics of tourist respondents (n=232)

Gender	Number of respondents	Percentage (%)	Valid Percentage (%)	Cumulative Percentage (%)
Male	143	61.6	61.6	61.6
Female	89	38.4	38.4	100.0
Total	232	100.0	100.0	

Analysis of the results

Table 4.2 shows that male tourist respondents are 61.6%, while female tourist respondents are 38.4%. Tourism developers should therefore strive to maintain the existing male tourists, but also seek ways to attract more female tourists.

4.2.1.3 Domestic tourists and International tourists

Understanding the relationship between domestic and international tourists that visit the Northern Province is important for tourism planners/developers, since it helps them to identify where emphasis in marketing strategies is needed. It also helps to identify their respective needs to serve and satisfy them.

Table 4.3 Origin of demographics of tourist respondents (n=232)

Origin	Number of respondents	Percentage (%)	Valid Percentage (%)	Cumulative Percentage (%)
Rwanda(domestic)	19	8.2	8.2	8.2
Foreigner(International)	213	91.8	91.8	100.0
Total	232	100.0	100.0	

Analysis of the results

Table 4.3 shows that international tourist respondents are 91.8%, while domestic tourist respondents are 8.2%. Tourism developers should maintain international tourists but also seek ways to attract more domestic tourists.

4.2.1.4 Province of origin for domestic tourists

Comparing the proportion of domestic tourist respondents by province of origin is important for tourism planners/developers in the Northern Province, since it helps them to identify in which province emphasis on marketing tourist products and services is needed.

Table 4.4 Origin of domestic tourist respondents by provinces (n=19)

Province of origin	Number of respondents	Percentage (%)	Valid Percentage (%)	Cumulative Percentage (%)
Eastern Province	6	31.6	31.6	31.6
Western Province	0	0.0	0.0	31.6
Southern Province	0	0.0	0.0	31.6
Kigali City	13	68.4	68.4	100.0
Total	19	100.0	100.0	

Analysis of the results

Table 4.4 shows that tourist respondents from the City of Kigali represent 68.4%; tourist respondents from the Eastern Province represent 31.6%; respondents from the Western and Southern Provinces represent 0% of the total number of tourist respondents. Tourism developers should attract more domestic tourists from the Western and Southern Province but also maintain domestic tourists from Kigali City and the Eastern Province.

4.2.1.5 Country of origin for international tourists

Tourist respondents were asked to indicate their country of origin. This information is important for tourism planners and/or developers, since it helps them to know where their customers come from. The information collected here may be used in tourism planning with the aim of knowing what tourists would enjoy, taking into account their origin.

Table 4.5 International tourist respondents by country of origin (n=232)

Country of origin	Number of respondents	Percentage (%)
Australia	10	4.3
Belgium	4	1.7
Bulgaria	3	1.3
Canada	10	4.3
Denmark	9	3.9
England	26	11.2
Finland	7	3
France	1	0.4
Germany	25	10.8
Greece	4	1.7
Holland	8	3.4
Israel	1	0.4
Kenya	9	3.9
Norway	11	4.7
Portugal	2	0.9
Russia	5	2.2
Rwanda	19	8.2
Scotland	4	1.7
Sweden	2	0.9
Switzerland	2	0.9
Uganda	1	0.4
Uruguay	7	3
USA	62	26.7
Total	232	100

Analysis of the results

Table 4.5 shows that most tourists during the study period were from the United States of America (USA), representing 26.7%, followed by tourists from England (11.2%) and Germany (10.8%). Domestic tourists (Rwandan) represent 8.2%. The information in the table above shows that at the time of the research there were no tourists from SADC (South African Development Community) countries and few from EAC (East African Community) countries of which Rwanda is a member, and no tourists from the rest of the African Continent. Tourism developers should maintain tourists from Europe and North America but also devise ways to attract tourists from South America and the African continent.

4.2.1.6 Education

Understanding of educational differences relating to consumers of tourism products and services in the Northern Province is important for tourism planners/developers, since it helps them to identify different tourists' educational levels with an aim of identifying their respective needs, and thereafter to serve and satisfy them accordingly.

Table 4.6 Education (n=232)

Level of education	Number of Respondents	Percentage (%)
Primary completed	7	3.0
Secondary completed	58	25.0
Certificate/diploma	132	56.9
Undergraduate Degree	31	13.4
Postgraduate	4	1.7
Total	232	100.0

Analysis of the results

Table 4.6 shows that tourist respondents with post-school certificates represent 56.9%, followed by tourist respondents who have completed secondary education representing 25.0%, while tourists who have postgraduate qualifications represent 1.7%. Tourism developers should attract tourists who have postgraduate degrees, because they have a higher potential to pass on relevant information to prospective visitors.

4.2.1.7 Income

Tourists in the Northern Province of Rwanda were asked their net monthly income. From a marketing perspective it is necessary to find out the purchasing power of consumers. It would help tourism planners/developers in the Northern Province to set prices of tourism products and services in accordance with consumers' purchasing power.

Table 4.7 Income (n=232)

Net monthly income (in Rwandan Francs)	Number of respondents	Percentage (%)
Non disclosure	3	1.3
<100000	8	3.4
100001-200000	1	.4
200001-300000	5	2.2
300001-400000	12	5.2
400001-500000	12	5.2
500001-600000	41	17.7
600001-700000	39	16.8
700001-800000	41	17.7
800001-900000	33	14.2
900001-1000000	20	8.6
>1000000	17	7.3
Total	232	100.0

Analysis of the results

Table 4.7 shows that the majority of tourist respondents earn a net monthly income that ranges between 500,001-900,000 Rwandan francs (between 833 and 1500 US\$ at an exchange rate of 600 RWF to the US\$) and represent 51.1%. Tourist respondents representing 1.3% did not disclose their net monthly income and 3.4% of tourist respondents earn less than 100000 Rwandan Francs (approximately 167 US\$).

4.2.1.8 Purpose of visit

Tourists in the Northern Province of Rwanda were asked the purpose of their visit. This data is useful for tourism planners in relation to development, promotion and diversification of tourism services and products.

Table 4.8 Purpose of visit (n=232)

Purpose	Respondents	Percentage (%)
Natural attractions	128	55.2
Adventure	132	56.9
Social(VRF)	9	3.9
Wildlife	80	34.5
Culture/Heritage	20	8.6
Business	9	3.9
Trading	0	0
Night life	0	0
Health	0	0
Other(experience)	1	0.4
Other (Research)	2	0.9

Analysis of the results

Table 4.8 shows that most tourist respondents visit the Northern Province for adventure purposes, namely 56.9%, followed by tourists who come for its natural attractions. Under this section it was possible to see that tourists visit the Northern Province for more than one reason. Tourism developers should attract tourists to come for businesses, nightlife and health.

4.2.2 Source of information

Tourists in the Northern Province of Rwanda were asked how they became aware of the Northern Province (source of information). The reason for this question was to identify the most used channel of communication so that more advertising could be sent to the least used channels of information.

Table 4.9 Source of information (n=232)

Source of information	Respondents	Percentage (%)
Television	8	3.4
Radio	2	0.9
Magazine	73	31.5
Newspapers	20	8.6
Internet	126	54.3
Travel guide	96	41.4
Previous visit	19	8.2
Friends or Relatives	31	13.4
Other	0	0

Analysis of the results

The table above shows that the internet was used as a main source of information by 54.3% of tourist respondents, followed by magazines, which were used by 31.5%. Radio is the least used, since only tourists representing 0.9% were informed via radio. Tourism developers should use different channels of communication to access as many tourists as possible.

4.2.3 Advise friends, relatives or colleagues

Tourists in the Northern Province of Rwanda were asked if they would inform their friends, relatives and or colleagues about the experience that they gained in the Northern Province. The reason for this question was to identify indirectly their satisfaction. “No definitely” meant that tourists did not gain any experience, “possibly” meant that the tourist was indifferent, and yes definitely meant that tourists would entice other tourists to visit the Northern Province of Rwanda.

Table 4.10 Attraction of tourists by other tourists (n=232)

Possibility of sharing the experience with others	Respondents	Percentage (%)
No, definitely not	2	.9
Possibly	30	12.9
Yes definitely	200	86.2
Total	232	100.0

Analysis of the results

Table 4.10 shows that 86.2% of tourist respondents would definitely tell their friends, relatives and/or colleagues about the Northern Province, and 9% will definitely not inform others about the experience that they gained during their stay in the Northern Province. This information shows that tourists were satisfied with the experience they gained and they wanted to share it with their relatives, friends and colleagues. These visits could be used as a valuable form of word- of-mouth marketing.

4.2.4 Retention of tourists

Tourists in the Northern Province of Rwanda were asked if they were likely to come back to the Northern Province within the next two years. The reason for this question was to identify their satisfaction. “Not likely” meant that tourists did not gain any experience, “possibly” meant that the tourist was indifferent and “yes likely”, meant that tourists probably had a positive impression of their visit.

Table 4.11 Tourist retention

Possibility of coming back within the next 2 years	Respondents	Percentage (%)
No, Not likely	51	22.0
Possibly	137	59.1
Yes, likely	44	19.0
Total	232	100.0

Analysis of the results

Table 4.11 shows that 59.1% of tourist respondents would possibly go back to the Northern Province within the next two years, 22% were not likely, and the other 19% were likely to return. The reason for “not likely” or “possibly” coming back was justified by the fact that they

were relatively satisfied and would prefer to explore new destinations. This information shows the majority of tourists might come back to the Northern Province in the future.

Table 4.12 Motive for not taking a trip to the Northern Province in the next two years (n=232)

Motive	Respondents	Percentage (%)
Missing responses	225	97.0
I have seen them (mountain gorillas)	1	0.4
I will be going back to the USA	1	0.4
I will visit other countries	1	0.4
I will visit other places	1	0.4
Once is enough	1	0.4
Strongly satisfied	1	0.4
Visit other countries	1	0.4
Total	232	100

Analysis of the results

The information in the table above shows that the seven tourists who responded to the question would not take a trip to the Northern Province within the next two years because they considered that one visit was enough.

4.2.5 Tour package arrangement

Tourists in the Northern Province of Rwanda were asked how their tours were arranged. The reason behind this question was to identify the most preferred way of arranging visits.

Table 4.13 Tour package arrangement (n=232)

Operator	Respondents	Percentage (%)
No	182	78.4
Yes	50	21.6
Total	232	100.0

Analysis of the results

Table 4.13 shows that 21.6% of tourist visits were arranged as a tour package, while 78.4% of respondents preferred to make their own arrangements. This information suggests that correct detailed facts must be provided in the various forms of marketing.

4.2.6 Tour package costs

Tourists in the Northern Province of Rwanda were asked the costs of their tour packages. The reason for this question was to identify the total economic contribution of a tourist to the region.

Table 4.14 Tour package costs (n=232)

Total cost	Respondents	Percentage (%)
Missing responses	182	78.4
<500000	0	0
500001-1000000	1	0.4
1000001-1500000	5	2.2
1500001-2000000	6	2.6
2000001-2500000	20	8.6
2500001-3000000	10	4.3
3000001-3500000	1	0.4
3500001-4000000	2	0.9
4000001-4500000	0	0
4500001-5000000	1	0.4
5000001-5500000	0	0
5500000-6000000	2	0.9
6000001-6500000	0	0
6500001-7000000	0	0
7000001-7500000	0	0
7500001-8000000	0	0
8000001-8500000	0	0
8500001-9000000	1	0.4
9000001-9500000	0	0
9500001-10000000	1	0.4
>10000000	0	0
Total	232	100

Analysis of the results

Table 4.14 shows that the tour costs for the 50 respondents who used an operator ranged between 500,001.00Rwf and 10,000,000.00 RWF (approximately 833 and 16,667US\$). This suggests that only a small contribution to the local economy originates through organized packages.

4.2.7 Tour package inclusion

Tourists in the Northern Province of Rwanda were asked what was included in their tour packages. The reason for this question was to identify tourism sub-sectors that benefitted from the total cost contributed by one tourist in the Northern Province.

Table 4.15 Other sectors benefiting directly from the tour package (n=232)

Sectors benefitting from the tour	Respondents	Percentage (%)
Missing information	79	0
Transport	50	21.5
Accommodation	50	21.5
Food and Beverage	22	9.4
Coach tours	21	9
Car hire	9	3.8
Others	1	0.4

Analysis of data

Table 4.15 shows that 43% of tour packages included accommodation and transport; 9.4% included food and beverage; 9% included coach tours; and 3.8% included car hire. This information shows that transport and accommodation are the first tourism sub sectors that benefit from tourists. It is obvious a tourist needs a place to stay and transport when away from home. These sectors should be further promoted.

4.2.8 Type of accommodation

Tourist respondents were asked to specify the type of accommodation that they used during their stay in the Northern Province. It is important for tourism planners/developers to know the most preferred type of accommodation among tourists.

Table 4.16 Type of accommodation (n=232)

Type of accommodation	Respondents	Percentage (%)
4-5 star	4	1.7
1-3 star	83	35.8
Guest house	62	26.7
House rental	13	5.6
friends/family	7	3.0
Game Lodge	7	3.0
Tented camp	1	.4
Day trip	55	23.7
Total	232	100.0

Analysis of results

Table 4.16 shows that 35.8% of tourists stayed at 1-3 star hotels, while 26.7% of tourists stayed at guest houses and 23.7% did day trips from their home base. This information shows the majority of tourist respondents were staying in 1-3 star hotels and guest houses, and the type of accommodation that could be further developed and promoted.

4.2.9 Length of stay

Tourist respondents in the Northern Province were asked to specify the number of nights that they spent or would spend in the Northern Province. The rationale for this information was to find out how long the tourists stayed at their accommodation establishments. The longer the stay, the more the revenue, and the reverse is true.

Table 4.17 Length of stay (n=232)

Type of accommodation	Length of stay	Percentage (%)
4-5*Hotel	71	40.3
1-3*Hotel	70	39.8
Guest House	18	10.2
House rental	6	3.4
Friends/Family	5	2.8
Game Lodge	3	1.7
Others	3	1.7
Total	176	100.0

Analysis of the results

Table 4.17 shows that 40.3% of tourist respondents stayed at 4-5* hotels and spent a total of 71 nights at those hotels; 39.8% of tourist respondents stayed at 1-3* hotels and spent 70 nights there, 2.8% stayed with friends or family; and 1.7% stayed at game lodges. This information shows that tourists who were staying in 4-5 and 1-3 star hotels were staying longer than in other types of accommodations. In total 232 tourists stayed for 176 nights, suggesting many day-visitors.

4.2.10 Tourism sub sectors' contribution in terms of number of tourists serviced

Tourist respondents in the Northern Province were asked to specify the number of nights that they spent or would spend in the Northern Province. The rationale for this information was to find

out how long tourists stayed at their accommodation establishments. The longer they stay the higher the revenue.

Table 4.18 Tourism sub sectors' contribution in terms of number of tourists serviced (n=232)

Sub sector	Respondents	Percentage (%)
Travel services/Tour operators	151	65.1
Transportation (including airfares)	184	79.3
Accommodation	173	74.6
Food and Beverage	216	93.1
Visiting attractions	224	96.6
Recreation and Entertainment	97	41.8
Other services	181	78.0

Analysis of the results

Table 4.18 shows that 96.6% of respondents visited attractions; 93.1% needed services from the food and beverage sector; 79.3% needed service from the transportation sector; 74.6% needed accommodation; 65.1% needed travel services; and 41.8% benefited from the recreation and entertainment sector. This information shows that tourism sub-sector complement one another and must work together as a unit.

4.2.11 Tourism sub sectors' contribution to total tourism revenue

The rationale for this information was to establish which tourism sub-sector made more revenue, and its contribution to the tourism industry as a whole.

Table 4.19 Tourism sub-sectors' contribution to total revenue earned (n=232)

Sub sectors	Revenues	Percentages (%)
Travel Services/Tour operators	3,561,427.00	8.0
Transportation(including airfares)	22,473,427.00	50.4
Accommodation	5,169,427.00	11.6
Food and Beverage	3,273,427.00	7.3
Visiting attractions	4,361,427.00	9.8
Recreation and Entertainment	2,866,427.00	6.4
Other services	2,866,427.00	6.4
Total	44,571,989.00	100.0

Analysis of the results

Table 4.19 shows that 50.4% of the total tourist revenue was made by the transportation industry; the accommodation sector earned 11.6%; attractions earned 9.8%; and travel services earned 8%; food and beverage earned 7.3% and both recreation and other services earned 6.4% respectively of the tourist spend. Transportation and accommodation remain the most important sub- sectors

4.2.12 Daily average consumption per tourism sub-sector

The rationale for this information was to establish the average daily expenses in all tourism sub-sectors in the Northern Province. This will help tourism planners with the costing control of tourism products and services.

Table 4.20 Daily average expenditure per tourism sub sector (n=232)

Sub sector	Expenditure	Number of Visitors	Average expenditure
Travel Services/Tour operators	1,162,633.33	100	11,626.33
Transportation(including airfares)	2,150,583.33	121	17,773.42
Accommodation	2,140,583.33	166	12,895.08
Food and Beverage	1,233,583.33	216	5,711.03
Visiting attractions	4,855,583.33	196	24,773.38
Recreation and Entertainment	752,583.33	64	11,759.11
Other services			
Total	12,295,549.98		

Analysis of the results

Table 4.20 shows that, on average, tourists in the Northern Province spend per day 24,773.38 RWF (equivalent to 41.29 US\$) on visiting natural attractions; they spend 17,773.42 RWF (equivalent to 29.62 US\$) on transport: 11,759.11 RWF (19.38 US\$) on recreation and entertainment; 11,626.33 RWF (19.60 US\$) on travel services; and 5,711.03 RWF (9.52 US\$) on food and beverage and 12,895.08 RWF on accommodation (21.49 US\$). This information shows that tourists spend more for visiting attractions than other services but this fact could be high entrance fee at attraction sites.

4.3 Level of satisfaction

The rationale for this information was to establish tourist level of satisfaction. Tourist respondents were asked to rate their level of satisfaction with each sub-sector of the tourism industry.

4.3.1 Travel services sector

The rationale for this information was to establish tourist level of satisfaction with travel services.

Table 4.21 Level of satisfaction with travel services sector (n=232)

Level of satisfaction	Respondents	Percentage (%)
Satisfactory	13	5.6
Good	90	38.8
Excellent	115	49.6
Exceeded expectations	14	6.0
Total	232	100.0

Analysis of the results

Table 4.21 shows that 49.6% of respondents confirmed that services provided by the travel services were excellent; 38.8% confirmed they were good; 6% confirmed that the service that they received exceeded their expectations; and 5.6% said that it was satisfactory. This information shows that services provided by travel agencies were positively perceived by tourists, but that there is room for improvement.

4.3.2 Transportation sector

The rationale for this information was to establish tourist level of satisfaction with the transport sector.

Table 4.22 Level of satisfaction with the transportation sector (n=232)

Level of satisfaction	Respondents	Percentage (%)
Satisfactory	10	4.3
Good	65	28.0
Excellent	136	58.6
Exceeded expectations	19	8.2
Total	230	99.1
Total	232	100.0

Analysis of the results

Table 4.22 shows that 58.6% of tourists confirmed that services provided by transportation agencies were excellent; 28.0% confirmed that they were good; 8.2% confirmed that the service that they received exceeded their expectations; and 4.3% said that they were satisfactory. Providers should work for higher levels of services delivery.

4.3.4 Accommodation sector

The rationale for this information was to establish tourists' level of satisfaction with the accommodation sector.

Table 4.23 Level of satisfaction with the accommodation sector (n=232)

Level of satisfaction	Respondents	Percentage (%)
Satisfactory	1	.4
Good	54	23.3
Excellent	137	59.1
Exceeded expectations	40	17.2
Total	232	100.0

Analysis of the results

Table 4.23 shows that 59.1% of tourist respondents confirmed that services provided by the accommodation sector were excellent; 23.3% confirmed that it was good; 17.2% confirmed that the service that they received exceeded their expectations; and 0.4% said that it was satisfactory. This information shows that services provided by accommodations were positively perceived by tourists, but the service level could be improved.

4.3.5 Food and beverage sector

The rationale for this information was to establish tourists' level of satisfaction with the food and beverage sector.

Table 4.24 Level of satisfaction with the food and beverage sector (n=232)

Level of satisfaction	Respondents	Percentage (%)
Satisfactory	2	.9
Good	64	27.6
Excellent	134	57.8
Exceeded expectations	32	13.8
Total	232	100.0

Analysis of the results

Table 4.24 shows that 57.8% of respondents confirmed that services provided by the food and beverage sector were excellent; 27.6% confirmed that it was good; 13.8% confirmed that the service that they received exceeded their expectations; and 0.9% said that it was satisfactory. This information shows that services provided by the food and beverage sector were positively

perceived by tourists, but that attention should be paid to the reasons why some tourists responded only as “good”.

4.3.6 Entertainment and recreation sector

The rationale for this information was to establish tourists’ level of satisfaction with the entertainment and recreation.

Table 4.25 Level of satisfaction with entertainment and recreation (n=232)

Level of satisfaction	Respondents	Percentage (%)
Poor	3	1.3
Satisfactory	4	1.7
Good	71	30.6
Excellent	136	58.6
Exceeded expectations	18	7.8
Total	232	100.0

Analysis of the results

Table 4.25 shows that 58.6% of respondents confirmed that services provided by the entertainment and recreation sector were excellent; 30.6% confirmed that they were good; 7.8% confirmed that the service that they received exceeded their expectations; and 1.3% said that it was satisfactory. This information shows that services provided by entertainment and recreation sector were positively perceived by tourists, but attention must be given to the 30.6% not entirely happy with the service.

4.3.7 Reasons for dissatisfactions with the Northern Province tourism industry

The rationale for this information was to ascertain the reasons why tourist respondents were dissatisfied. This information will help tourism planners/developers or managers in tourism industry to know where they can improve regarding their service delivery.

Table 4.26 Reasons for dissatisfactions (n=232)

Dissatisfied	Respondents	Percentage (%)
Missing responses	228	98.28
Delay in service delivery	4	1.72
Total	232	100.00

Analysis of the results

Table 4.26 reveals that the majority did not respond so a meaningful conclusion cannot be made. There was some dissatisfaction with the delay in service delivery.

4.4 Recommendations

The rationale for this information was to seek recommendations from tourists for the development and improvement in the tourism sub-sectors. This information could help tourism planners/developers or managers in the tourism industry to know how their sector is perceived by clients.

4.4.1 Travel services

The rationale for this information was to seek recommendations from tourist respondents for the development and improvement in travel services sector.

Table 4.27 Recommendations for travel services sector (n=232)

Recommendation	Respondents	Percentage (%)
Neutral	2	.9
Good as it is	214	92.2
More emphasis	16	6.9
Total	232	100.0

Analysis of the results

Table 4.27 shows that 92.2% of tourist respondents confirmed that the travel services sector is good as it is; 6.9% confirmed that it needs more developmental emphasis; 0.9% of respondents

were neutral. This information shows that the majority of tourists perceive that travel agencies are satisfactory developed.

4.4.2 Transportation sector

The rationale for this information was to seek recommendations from tourist respondents for the development and improvement in transportation sector.

Table 4.28 Recommendations for development of the transportation sector (n=232)

Recommendation	Respondents	Percentage (%)
Neutral	2	.9
Good as it is	206	88.8
More emphasis	24	10.3
Total	232	100.0

Analysis of the results

Table 4.28 shows that 88.8% of respondents confirmed that the transportation sector is good as it is; 10.3% confirmed that it needs more developmental emphasis; 0.9% of respondents were neutral. This information shows that the majority of tourists perceive that transportation sector is satisfactory developed.

4.4.3 Accommodation sector

The rationale for this information was to seek recommendations from tourist respondents for the development and improvement in accommodation sector.

Table 4.29 Recommendations for development of the accommodation sector (n=232)

Recommendation	Respondents	Percentage (%)	Valid Percentage (%)	Cumulative Percentage (%)
Neutral	1	.4	.4	.4
Good as it is	224	96.6	96.6	97.0
More emphasis	7	3.0	3.0	100.0
Total	232	100.0	100.0	

Analysis of the results

Table 4.29 shows that 96.6% of tourist respondents confirmed that the accommodation sector is good as it is; 3% suggest that it needs more developmental emphasis and 0.4% of respondents

had no specific opinion. This information shows that the majority of tourists perceive that the accommodation sector is already developed and no drastic changes are presently needed.

4.4.4 Food and beverage sector

The rationale for this information was to seek recommendations from respondents for the development of the food and beverage sector.

Table 4.30 Recommendations for development of the food and beverage sector (n=232)

Recommendations	Respondents	Percentage (%)	Valid Percentage (%)	Cumulative Percentage (%)
Neutral	3	1.3	1.3	1.3
Good as it is	221	95.3	95.3	96.6
More emphasis	8	3.4	3.4	100.0
Total	232	100.0	100.0	

Analysis of the results

Table 4.30 shows that 95.3% of tourist respondents confirmed that the food and beverage sector is good as it is; 3.4% suggest that it needs more developmental emphasis; 1.3% of respondents were neutral. This information shows that the majority of tourists perceive that food and beverage sector is sufficiently developed to meet the present industry needs.

4.4.5 Entertainment and recreation sector

The rationale for this information was to seek recommendations from tourist respondents for the development of the entertainment and recreation sector.

Table 4.31 Recommendations for development of the entertainment and recreation sector (n=232)

Recommendations	Respondents	Percentage (%)	Valid Percentage (%)	Cumulative Percentage (%)
Neutral	18	7.8	7.8	7.8
Good as it is	194	83.6	83.6	91.4
More emphasis	20	8.6	8.6	100.0
Total	232	100.0	100.0	

Analysis of the results

Table 4.31 shows that 83.6% of respondents confirmed that the entertainment and recreation sector is good as it is; 8.6% suggest that it needs more developmental emphasis; 7.8% of respondents were neutral. This information shows that the majority of tourists perceive that the food and beverage sector is sufficiently developed to meet their present needs.

4.4.6 Means of transport

The rationale for this information was to ascertain from respondents the means of transport.

Table 4.32 Means of transport (n=232)

Transport mode	Respondents	Percentage (%)
Personal automobile	32	13.8
Motor coach	110	47.4
Rental car	54	23.3
Taxi	36	15.5
Total	232	100.0

Analysis of the results

Table 4.32 shows that 47.4% of respondents used motor coaches to arrive in the Northern Province; 23.3% used rental cars; 15.5% used taxis; and 13.8% used personal automobiles. This information shows that visitors rely heavily on public provided transport.

4.4.7 Port of entry

The rationale for this information was to ascertain from respondents the port of entry. This information will help tourism planners/developers or managers in the tourism industry to know where development is needed in the ports of entry.

Table 4.33 Port of entry (n=232)

Ports of entry	Respondents	Percentage (%)
Missing responses	14	6.0
Kigali international Airport	186	80.2
Gisenyi border gate	4	1.7
Gatuna border gate	20	8.6
Cyanika border gate	8	3.4
Total	232	100.0

Analysis of the results

Table 4.33 shows that 80.2% of tourist respondents used Kigali International Airport to enter Rwanda; 8.6% entered via the Gatuna border; 3.4% via Cyanika; and 1.7% from the Gisenyi border. This information confirms that the majority of tourists access the Northern Province via Kigali (the capital city) where the international airport (the main port of entry) is located. Any future infrastructural development should probably concentrate here.

4.5 Overall impression of Northern Province

The following group of question tested various criteria of the tourist's overall impression of the Northern Province.

4.5.1 Friendliness of locals

The rationale for this information was to ascertain from tourists their impressions of their stay as far the locals' friendliness is concerned.

Table 4.34 Friendliness in the Northern Province (232)

Measure	Respondents	Percentage (%)
Fair	4	1.7
Good	228	98.3
Total	232	100.0

Analysis of the results

Table 4.34 shows that 98.3% of respondents said that people in the Northern Province were friendly; this is positive and tourism developers in the Northern Province should encourage friendship by locals towards tourists because they want to feel home away from home.

4.5.2 Helpfulness of locals

The rationale for this information was to ascertain from tourists their impressions of their stay as far as locals helpfulness is concerned.

Table 4.35 Helpfulness in the Northern Province (n=32)

Measure	Respondents	Percentage (%)
Fair	5	2.2
Good	227	97.8
Total	232	100.0

Analysis of the results

Table 4.35 shows that 97.8% of respondents said that people in the Northern Province were helpful. This is positive and tourism developers in the Northern Province should encourage helpfulness by locals towards tourists because they want to be assisted when away from home.

4.5.3 Cleanliness of facilities

The rationale for this information was to ascertain from tourists their impressions of their stay as far as cleanliness is concerned.

Table 4.36 Cleanliness in the Northern Province of Rwanda (n=232)

Measure	Respondents	Percentage (%)
Poor	10	4.3
Fair	65	28.0
Good	157	67.7
Total	232	100.0

Analysis of the results

Table 4.36 shows that 67.7% of tourist respondents said that the Northern Province was clean; and 28.0% said that the area was only fairly clean. Tourism developers must encourage cleanliness in the province by local inhabitants because tourists want to stay in a clean and hygienic environment.

4.5.4 Value-for-money of facilities

The rationale for this information was to ascertain from tourists their impressions of their stay as far value for money is concerned.

Table 4.37 Value for money in the Northern Province of Rwanda (n=232)

Measure	Respondents	Percentage (%)
Poor	2	.9
Fair	56	24.1
Good	174	75.0
Total	232	100.0

Analysis of the results

Table 4.37 shows that 75% of tourist respondents said that services were good value for money in the Northern Province; 24.1% rated the expenses as fair. Tourism developers must concentrate on providing value for money. Tourists are way from home and pay for every service they get. They convert the local currency into their own currencies to make sure that the moneys they are paying is a fair reflection of service received. Tourist expenditure has an impact on maintaining existing tourists and attracting new ones to Rwanda.

4.5.5 Banking facilities

The rationale for this information was to ascertain from tourists their impressions of the banking facilities.

Table 4.38 Banking in the Northern Province of Rwanda (n=232)

Measure	Respondents	Percentage (%)
Poor	14	6.0
Fair	70	30.2
Good	148	63.8
Total	232	100.0

Analysis of the results

Table 4.38 shows that 63.8% of respondents said that banking facilities in the Northern Province are good; and 30.2% said that banking facilities were fair. While this is positive, tourism developers in the Northern Province should liaise with bankers to make sure that services provided by banks are totally effective and efficient.

4.5.6 Customer care

The rationale for this information was to ascertain from tourists their impressions of their stay as far as customer care is concerned.

Table 4.39 Customer care in the Northern Province of Rwanda (n=232)

Measure	Respondents	Percentage (%)
Poor	1	0.4
Fair	71	30.6
Good	160	69.0
Total	232	100.0

Analysis of the results

Table 4.39 shows that 69.0% of respondents said that customer care in the Northern Province was good while 30.6% said that customer care was fair. This is positive but tourism developers in the Northern Province should nevertheless liaise with all service providers to make sure that services are fully effective and efficient.

4.6 Part two: Tourism business owners/managers as respondents

This research considered tourism business owners/managers in the Northern Province of Rwanda as respondents with the aim of knowing their business characteristics, their economic development and their perceptions concerning the overall tourism economic development in the Northern Province of Rwanda.

4.6.1 Respondents' position in the business

Respondents were asked to identify their positions in the business. This information was important to know if respondents had authority to provide, the required data concerning the business.

Table 4.40 Respondents' position in the business (n=58)

Position	Respondents	Percentage (%)
Owner of the organization	24	41.4
Manager of the organization	30	51.7
Other	4	6.9
Total	58	100.0

Analysis of the results

Table 4.40 shows that 51.7% of the respondents were managers, while 41.4% were owners of the business, and 6.9% occupied other positions. The question arises as to whether they have the necessary tourism and hospitality skills. Tourism developers in the Northern Province should encourage management to be assigned to people with tourism and hospitality skills, or to equip owners who are managing their businesses with basic tourism and hospitality skills.

4.6.2 Type of the business

Respondents were asked to identify their type of tourism business. This information was important to the research to know if all tourism sub-sectors were represented in the research, and therefore enhance the validity of possible conclusions.

Table 4.41 types of business

Tourism sector	Respondents	Percentage (%)
Accommodation	12	20.7
Food and Beverage	12	20.7
Recreation and Entertainment	10	17.2
Transportation	12	20.7
Travel services	12	20.7
Total	58	100

Analysis of the results

Table 4.41 shows that all tourism sub-sectors were represented in the research and that the information gathered could be trusted if used for development purposes.

4.6.3 Length of existence of the business

Respondents were asked to identify how long their businesses had been in existence. This information was important to know whether the number of tourism business entities has increased, suggesting a growth in tourism activities in the Northern Province.

Table 4.42 Length of existence of tourism business entities

Business length of existence	Respondents	Percentage (%)
<1year	2	3.4
1-4years	12	20.7
5-9years	14	24.1
10-14years	18	31.0
15 years and longer	12	20.7
Total	58	100.0

Analysis of the results

Table 4.42 shows that 31.0% of tourism businesses have been in existence for between 10 and 14 years; 24.1% between 5 and 9 years; 20.7% between 1 and 4 years; 20.7% for more than 15 years; and 3.4% have been in existence for less than 1 year. This information reveals that tourism businesses are at least maintaining their influence in the Northern Province.

4.6.4 Size of the tourism business entity

Respondents were asked to identify the size of their businesses. This information was important to the research to know of the capacity to expand in the tourism industry.

Table 4.43 Business sizes

Size	Respondents	Percentage (%)
Small	25	43.1
Medium	29	50.0
Big	4	6.9
Total	58	100.0

Analysis of the results

Table 4.43 shows that 50.0% of businesses were medium sized and 43.1% were small. This information shows that most tourism businesses have the capacity to expand and take part in any possible future development of the Northern Province industry.

4.3.5 Number of employees

Respondents were asked to indicate the number of employees in their business. This information was important to know the direct economic impact of tourism on employment.

Table 4.44 Number of employees in 2010 (n=58)

Employees	Respondents	Percentage (%)
1-19	34	58.6
20-39	15	25.9
40-59	4	6.9
60-79	5	8.6
Total	58	100.0

Analysis of the results

Table 4.44 shows that 58.6% of tourism businesses have less than 19 employees; 25.9% had between 20 and 39 employees; 8.6% had between 60 and 70 employees; and 6.9% had between 40 and 59 employees. Employment in the tourism industry, especially small entities, appears viable.

4.6.6 Number of employees at the opening of the organisation

Respondents were asked to identify the number of employees that they had at the start of their business. This information was important to help us to identify the evolution of the business.

Table 4.45 Number of employees in the first year of existence (n=58)

Employees	Respondents	Percentage (%)
1-19	49	84.5
20-39	7	12.1
40-59	2	3.4
Total	58	100.0

Analysis of the results

Table 4.45 shows that 84.5% of tourism business entities had between 1 and 19 employees in their first year of existence and 12.1% had between 20 and 39 employees. The comparison between tables 4.44 and 4.45 reveals that the number of employees in tourism business entities appears to be increasing.

4.6.7 Tourism businesses' monthly turnover in 2010

Respondents were asked to specify their monthly turnover. This information was important to know because the higher the revenue the higher the profit and the more economic impact the business had on local employment.

Table 4.46 Monthly turnover in 2010 (n=58)

Turnover in Rwandan Francs	Respondents	Percentage (%)
Below 1 million	6	10.3
1-19	33	56.9
20-39	15	25.9
40-59	4	6.9
Total	58	100.0

Analysis of the results

Table 4.46 shows that 56.9% of tourism business entities earned between one and 19 million Rwandan francs in 2010 (1,667 and 31,667 US\$) while 25.9% earned between 20 and 39 million Rwandan francs. (33,333 and 65,000 US\$) Businesses appear financially viable and capable of contributing to the economic wellbeing of the local people.

4.6.8 Tourism business monthly turnover in the first year of existence

Respondents were asked to specify their monthly turnover in their first year of existence. This information was important to ascertain variations in turnover of tourism business entities.

Table 4.47 Monthly turnover in the first year of existence (n=58)

Turnover in Rwandan francs	Respondents	Percentage (%)
Below 1 million	36	62.1
1-19 million	22	37.9
Total	58	100.0

Analysis of the results

Table 4.47 shows that 62.1% of tourism business entities earned one million Rwandan francs or less (1,667 US\$) in their first year of existence; while 37.9% earned between one and 19 million Rwandan francs (1,667 and 31,667 US\$) The comparison between tables 4.45 and 4.46 shows that the revenues generated by tourism business entities appears to be on an upward trend.

4.6.9 Number of clients per sector in 2010

Respondents were asked to specify the number of clients they serviced in 2010. This information would help to make comparisons between 2010 and the first years of existence in terms of the development in the number of clients serviced.

Table 4.48 Number of clients serviced in 2010 (n=58)

Clients services	Respondents	Percentage (%)
below 1000	23	39.7
10001-10,000	29	50.0
10,001-20,000	6	10.3
Total	58	100.0

Analysis of the results

Table 4.48 shows that 50.0% tourism business entities served between one and 1000 clients in 2010, and 39.7% tourism business entities served 1000 or less in 2010.

4.6.10 Number of clients per sector in the first year of existence

Respondents were asked to specify the number of clients they serviced in their first year of their existence. This information would help to make comparisons between 2010 and the first year of existence in terms of the development in the number of clients serviced.

Table 4.49 Number of clients serviced in the first year of existence (n=58)

Clients service	Respondents	Percentage (%)
below 1000	44	75.9
10,001-10,000	14	24.1
Total	58	100.0

Analysis of the results

Table 4.49 shows that 75.9% served between 1 and 1000 in the first year of their existence, and 24.1% served between 1000 and 10,000 in their first years of their existence. A comparison between table 4.47 and table 4.48 shows increasing trend in clients.

4.6.11 Tourism business profitability in 2010

Respondents were asked to specify their profitability for 2010. This information would help to make comparisons between 2010 and the first year of their existence in terms of changes in profit.

Table 4.50 Tourism business profitability in 2010 (n=58)

Measure	Respondents	Percentage (%)
Good	11	19.0
Very good	23	39.7
Excellent	24	41.4
Total	58	100.0

Analysis of the results

Table 4.50 shows that 41.4% of tourism business respondents rated their profits as excellent and 39.7% very good. This information reveals that tourism business entities are currently profitable.

4.6.12 Parties that benefit from tourism business profits

Respondents were asked to specify which parties benefit from profits made. This information would help to identify direct beneficiaries of the tourism industry.

Table 4.51 Other beneficiaries (n=58)

Beneficiaries	Respondents	Percentage (%)
Government of Rwanda	58	100
Northern Province	55	94.8
Local Communities	52	89.7
Others	3	5.2

Analysis of the results

Table 4.51 reveals that the Rwandan Government is the major beneficiary, while 94.8% of respondents confirmed that the Northern Province benefits from profits they made, 89.7 % of respondents indicated that local communities in the Northern Province also benefit from tourism profits.

The following table shows perceptions of tourism business owners/managers regarding whether they think their business contributed to economic development.

Table 4.52 Tourism contribution to the economy (n=58)

Measure	Respondents	Percentage (%)
Boost the economy of the country	34	58.62
Country's development	13	22.41
Taxes payment	11	18.97
Total	58	100

Analysis of the results

Table 4.52 reveals the positive growth potential for the tourism industry in the Northern Province.

4.6.13 Perceptions of tourist arrivals in the Northern Province

Respondents were asked about their perceptions of the number of tourists in the Northern Province. The information was important since tourism business operators are those who need to plan for tourism development.

Table 4.53 Growth perceptions

Growth	Respondents	Percentage (%)
Not growing	0	0
Growing	31	53.4
Growing Fast	27	46.6
Total	58	100.0

Analysis of the results

Table 4.53 reveals the positive growth potential for the tourism industry in the Northern Province.

4.6.14 Perceptions of tourist arrivals in the Northern Province

Respondents were asked about their perceptions of the number of tourists in the Northern Province. The information was important since tourism business operators are those who need to plan for tourism development.

Table 4.54 Perceptions of tourism arrivals (n=58)

Measure	Respondents	Percentage (%)
Highly increasing	25	43.1
Increasing	33	56.9
Stable	0.0	0.0
Decreasing	0.0	0.0
Highly decreasing	0.0	0.0
Total	58	100.0

Analysis of the results

Table 4.54 shows that 56.9% of tourism business respondents believe that the number of tourists in the Northern Province is increasing. This is positive to know since businesses must plan for the increase in the number of tourists by expanding their businesses.

4.6.15 Average expenses per day per sector

Respondents were asked about the daily expenditures for services they offer.

Table 4.55 Clients daily expenditure (n=58)

Sector Expenses	Expenditure	Number of Businesses	Average daily Expenses
Accommodation	1,565,000.0	12.0	130,416.70
Transportation	220,000.0	12.0	18,333.30
Travel services	1,704,000.0	12.0	142,000.00
Food and Beverage	627,000.0	12.0	52,250.00
Entertainment and Recreation	1,839,000.0	10.0	183,900.00
Total	5,955,000.0	58.0	102,672.4

Analysis of the results

Table 4.55 shows that 142,000.0 RWF is the average daily expenses for travel services; tourists spent on average 130,416.7 RWF daily on accommodation; 183,900.0 RWF on entertainment and recreation; 52,250.0 RWF on food and beverage, and 18,333.3 RWF is spent on transportation. This appears to be a good base for boosting future business.

4.6.16 Average time spent in the Northern Province

The rationale for this question was to identify the average length of stay in the Northern Province of Rwanda. The longer tourists stay the more revenue the tourism industry generates

Table 4.56 Clients' average time spent in the Northern Province (n=58)

Days stayed	Business Respondents	Percentage (%)
1	4	6.9
2	15	25.9
3	11	19.0
4	6	10.3
5	10	17.3
6	5	8.6
7	5	8.6
8	1	1.7
10	1	1.7
Total	58	100

Analysis of the results

Table 4.56 shows that 25.9% of respondents believe that, on average, their clients spent two days in the Northern Province; 19.0% believed they spent three days; 17.2% believed they spent five days; 10.3% believed tourists spent four days; 8.6% believed that tourists spent six days; and 8.6 % believed that tourists spent seven days in the Northern Province. This information shows that service providers could persuade their clients to spend more time in the province.

4.6.17 Interesting tourism activities in the Northern Province

The rationale for this question was to identify the interesting tourism activities in the Northern Province of Rwanda. The importance of this information is to help tourism marketers know where more marketing strategies should be applied.

Table 4.57 Most interesting tourism activities in the Northern Province of Rwanda

Activity	Frequency	Percentage (%)
Visiting natural attractions	44	75.9
Adventure	39	67.2
Wildlife	29	50
Culture/Heritage	7	12.1
Business	24	41.4
Trading	22	37.9
Nightlife	4	6.8
Health	10	17.2
Other(specify)	4	5.1

Analysis of the results

Table 4.57 shows that 75.9% of respondents plan that most of their clients come to visit natural attractions; 67.2% for adventure; 41.4% for business; 37.9% for trading; 50% assume that their clients come for wildlife; 17.2% for health; 6.8% for nightlife; and 5.1% for other reasons. This information provides business with developmental information.

4.6.18 Efforts of the Government of the Northern Province to develop tourism

The rationale was to establish how tourism business owners/ managers perceive the efforts of the Government of the Northern Province of Rwanda to develop tourism. This information is important as it could help the government to know how tourism business operators perceive what the government does for them, and how they can best inform the government on developmental needs.

Table 4.58 Perceptions of Government efforts to develop tourism (n=58)

Perception	Frequency	Percentage (%)
low	3	5.2
medium	14	24.1
High	41	70.7
Total	58	100.0

Analysis of the results

Table 4.58 shows that 70.7% of tourism business respondents perceive that the efforts of the Government of the Northern Province to develop tourism is high while 24.1% perceive that the

efforts are medium. This information shows that tourism business entities owners/managers recognize the efforts of the Government in developing the tourism industry.

4.6.19 Efforts of the Government of the Northern Province’s to promote economic development

The rationale for this question was to ascertain how tourism business owners/managers perceive the efforts of the Government of the Northern Province to promote economic development.

Table 4.59 Tourism businesses’ perceptions about government efforts to promote economic development (n=58)

Perception	Frequency	Percentage (%)
Low	2	3.4
Medium	21	36.2
High	35	60.3
Total	58	100.0

Analysis of the results

Table 4.59 shows that 60.3% of tourism business respondents perceived that the efforts of the Government of the Northern Province to promote economic development were high; while 36.2% confirmed that the efforts are medium.

4.6.20 Tourism business respondents’ recommendations for tourism planners

This information could help tourism planners/developers to become aware of the requirements tourism business operators.

Table 4.60 Recommendations by tourism businesses respondents for tourism planners/developers (n=58)

Requirements	Respondents	Percentage (%)
No responses	49	84.5
Attract more tourists	1	1.7
Develop other attractions	1	1.7
Diversify tourism attractions	1	1.7
Improve transport services	1	1.7
Market the destination as much as possible	1	1.7
Modern airport is required	1	1.7
More emphasis on customer care	1	1.7
More human resources	1	1.7
Provide loans to business people who want to expand their business	1	1.7
Total	58	100

Analysis of the results

Table 4.60 shows that of the tourism business operators who responded suggest to tourism planners/developers that an airport is needed; also diversification of tourism products; a more vigorous marketing of the destination; and the development of human resources in the field of tourism and hospitality, that is, education and training.

4.7 Part three: Rwanda Development Board/Tourism and Conservation as respondent

This research considered the Rwanda Development Board/Tourism and Conservation in the Northern Province of Rwanda as a respondent with the aim of establishing the most preferred destinations, tourism's contribution to economic development, and the overall tourism economic development.

4.7.1 Most visited tourism activities in the Northern Province

The Rwanda Development Board/Tourism and Conservation in the Northern Province was asked to indicate the most visited attractions in the National Volcano Park. The reason for this information was to establish the importance of tourism products.

Table 4.61 Most visited tourism activities in the Northern Province

Attraction ranking	Activity
1	Gorilla trekking,
2	Golden Monkeys visits
3	Community walks

Analysis of the results

Table 4.61 shows that gorilla trekking is the most attractive activity, followed by visits to the golden monkeys and then community walks. As these tourism activities are located in the Volcano National Park developers should diversify tourism products so that tourists will engage in more activities and therefore spend more money in the province.

4.7.2 Where, and how many nights, were spent in the Northern Province by tourists?

The Rwanda Development Board/Tourism and Conservation in the Northern Province was asked to indicate which type of accommodation was sought, and how many nights, on average, tourists spent in the province. The reason for this question was to identify the most preferred type of accommodation; this could help tourism planners or accommodation owners, to plan accordingly.

Table 4.62 Where and how many nights were spent in the Northern Province?

Type of accommodation	Number of nights
4-5 star Hotel	3
1-3 star Hotel	4
Guest House/B&B	1
Private room/House rental	1
Private accommodation (Friends/Family)	1
Game lodge	3
Tented camp	2
Caravan Park	1
other (Specify)	0

Analysis of the results

Table 4.62 shows that tourists in the Northern Province spend, on average, four nights at 1-3 star hotels; three nights at 4-5 star hotel and in game lodges; two nights in tent camps, and one night in guest houses, private rooms/house rental, private accommodation and caravan parks. This information shows that tourists in the Northern Province do not stay long; therefore tourism developers should develop strategies to keep tourists by diversifying tourism products and creating entertaining activities.

4.7.3 Arrangement of tours

The Rwanda Development Board/Tourism and Conservation was asked to specify how tours are arranged by tourists to come to the Northern Province of Rwanda. The reason for this question was to identify if tourist visits benefit tour operators who arrange their tours.

Analysis of the results

The Board considers that a majority of tourists prefer that tour operators arrange tours for them. This information shows that visits benefit directly tour operators.

4.7.4 Maximum number of tourists allowed visiting the Volcano National Park per day

The Rwanda Development Board/Tourism and Conservation in the Northern Province was asked to specify the maximum number of tourists that are allowed to visit the Volcano National Park per day. The reason for this question was to identify the accommodating capacity of the

Park, which may have a positive or negative impact on the turnover to be made by other tourism sub-sectors. The higher the number of tourists in the region, the higher the income, and the reverse is also true.

Analysis of the results

The Board considers that the maximum number of tourists allowed to visit the Volcano National Park is 100 per day. This information shows that the carrying capacity of the Park is small, meaning that tourism products are limited in this Park.

4.7.5 Costs of different activities in the Volcano National Park

The Rwanda Development Board/Tourism and Conservation in the Northern Province was asked to specify the costs of different tourism activities in the Volcano National Park. The reason for this question was to ascertain the costs since they may have an impact on tourism businesses in the region, which could also affect the income of the local communities.

Table 4.63 Cost of tourism activities in the Volcano National Park

Activity	Type of tourists	Costs for visiting in RWF	Cost for visiting in US\$	Difference in Costs in US\$
Gorilla tracking	Domestic tourists	20,000	33.30	466.70
	International tourists	300,000	500.00	
Golden monkeys	Domestic tourists	4,000	6.70	243.30
	International tourists	150,000	250.00	
Bisoke	Domestic tourists	4,000	6.70	243.30
	International tourists	150,000	250.00	
Diane Fossey Tomb	Domestic tourists	4,000	6.70	243.30
	International tourists	150,000	250.00	
Karisimbi	Domestic tourists	30,000	50.00	200.00
	International tourists	150,000	250.00	

Analysis of the results

Table 4.63 confirms that international tourists pay much more for tourism activities than domestic tourists. The fact that international tourists pay more than domestic tourists is positive for the support and development of the domestic market, and funds are generated for tourism development.

4.7.6 Projects in which Rwanda Development Board/Tourism and Conservation is involved for the benefit of local communities

The Rwanda Development Board/Tourism and Conservation in the Northern Province was asked to specify projects that it is involved in, which could benefit the local community. The reason for this question was to identify direct contributions of tourism for local people.

Table 4.64 Projects in which the Rwanda Development Board/Tourism and Conservation is involved in that benefit local communities

Number	Name of the project	Purpose of the project
1	School building	Livelihood formation
2	Health centre	Livelihood formation
3	Girinka program	Livelihood formation
4	Bee keeping	Livelihood formation
5	Mushroom projects	Livelihood formation

Analysis of the results

Table 4.64 shows that local communities could benefit directly from the five projects that were initiated by the Rwanda Development Board/Tourism and Conservation.

4.7.7 Number of employees at the Rwanda Development Board/Tourism and Conservation in the Northern Province

The Rwanda Development Board/Tourism and Conservation in the Northern Province was asked to identify their total number of employees, and the number of employees that are originally from the Northern Province. The reason for this was to identify direct employment offered by the Rwanda Development Board for local people.

Table 4.65 Number of employees in the Rwanda Development Board/Tourism and Conservation

Number of employees	Frequency	Percentage (%)
Employees from the Northern Province	59	75.6
Total number of employees in RDB Northern Province	78	100.0

Analysis of the results

Table 4.65 shows that 75.6% of employees who work for the Rwanda Development Board/ Tourism and Conservation in the Northern Province are from this Province, benefiting local communities directly from employment through tourism.

4.7.8 Average daily expenditure per tourist

The Rwanda Development Board/Tourism and Conservation in the Northern Province was asked to identify the average monthly turnover that they make and the average monthly number of visitors they receive. The reason for this question was to identify the average daily expenditure per tourist.

Table 4.66 Average daily expenditure per tourist

Average monthly number of visitors	Average monthly turnover	Average monthly expenditure	Average daily expenditure per tourist
1200	360,000,000.00	300,000.00	10,000.00

Analysis of the results

Table 4.66 shows that the Rwanda Development Board/Tourism and Conservation in the Northern Province enjoys a monthly turnover of 360,000,000 RWF and 1200 visitors to the Volcano National Park. This information shows that one tourist spends 10,000 RWF per day on average (equivalent to 16.67 US\$).

4.7.9 Trends of tourists in the Volcano National Park

The Rwanda Development Board/Tourism and Conservation was asked to specify tourist trends to the Volcano National Park between 1995 and 2010. The reason for this data is to ascertain the financial viability of the Park.

Table 4.67 Trend of tourists at Volcano National Park from 1995-2010

Year	Number of visitors	change	Percentage (%)
1995	1200		
1996	800	-400	-33.3
1997	0	-800	-100
1998	0	0	0
1999	850	850	0
2000	6800	5950	700
2001	7100	300	4.4
2002	7300	200	2.8
2003	7476	176	2.4
2004	8593	1117	14.9
2005	10641	2048	23.8
2006	14507	3866	36.3
2007	18380	3873	26.7
2008	19970	1590	8.7
2009	18844	-1126	-5.6
2010	22733	3889	20.6

Analysis of the results

Table 4.67 shows that the number of tourists who visited the Volcano National Park decreased from 1995 to 1998 because of the genocide. Trends show an increase from 1999 to 2008, a decrease in 2009 then an increase in 2010. The park therefore is enjoying a general upward trend in visitors.

4.7.10 Trends of tourists visiting mountain gorillas

The Rwanda Development Board/Tourism and Conservation was asked to specify tourist trends to the mountain gorillas in the Volcano National Park between 1995 and 2010. The reason for this data is to ascertain the financial viability of viewing the gorillas in the Park.

Table 4.68 Trends of tourists who visited mountain gorillas at Volcano National Park from 1995-2010

Year	Number of visitors	change	Percentage (%)
1995	1200		
1996	800	-400	-33.3
1997	0	-800	-100
1998	0	0	0
1999	850	850	0
2000	600	-250	-29.4
2001	700	100	16.7
2002	700	0	0
2003	6879	6179	882.7
2004	7747	868	12.6
2005	9276	1529	19.7
2006	12068	2792	30.1
2007	16068	4000	33.1
2008	17082	1014	6.3
2009	11556	-5526	32.35
2010	18488	6932	59.9

Analysis of the results

Table 4.68 shows that the number of tourists who visit Gorilla Mountains decreased from 1995 to 1998, while the trend increased from 1999 to 2010. However there was an increase from 2000 to 2008, a decrease in 2009 with a drastic increase in 2010.

4.7.11 Rate of Rwanda Development Board/Tourism and Conservation profitability

The Rwanda Development Board/Tourism and Conservation was asked to rate their profitability from the sale of tourism activities in the Volcano National Park. The Board is optimistic about the continuing profitability of the VNP.

Analysis of the results

The Board believes that the profit that it made from tourism activities in the Volcano National Park is excellent. This information shows that RDB/Tourism and Conservation is proud of its profitability, but they should think and forecast and plan for the future to maintain that existing profitability.

4.7.12 Rate of Rwanda Development Board/Tourism and Conservation profitability

The Rwanda Development Board/Tourism and Conservation was asked to specify if there are others that benefit from its profits.

Table 4.69 Direct beneficiaries of tourism activities in the Northern Province of Rwanda

Direct Beneficiaries	How do they benefit?
Government of Rwanda	Rwanda economic growth (for example taxes paid by all tourism businesses)
Northern Province	Employment opportunities (for example local people working for tourism businesses in the province)
Local communities	<ol style="list-style-type: none"> 1. Development (for example infrastructural development) 2. Business (for example selling handcrafts to tourists) 3. Employment (for example working for hotels that are in the province) 4. Development of projects for livelihood (for example Girinka project)

Analysis of the results

Table 4.69 shows that local communities do benefit from the Rwanda Development Board/Tourism and Conservation in a direct way through development, businesses, employment and the development of certain projects.

4.7.13 Efforts of the Rwanda Development Board/Tourism and Conservation to promote economic development in the Northern Province of Rwanda

The Rwanda Development Board/Tourism and Conservation in the Northern Province was asked to rate its own efforts to promote economic development in the province.

Analysis of the results

The Rwanda Development Board/Tourism and Conservation rates its efforts to promote economic development in the province as medium. This evaluation allows for future efforts to generate economic activities.

4.8 Summary

Chapter Four analyses the data that was collected by means of questionnaires and interviews, and was done by using SPSS (Statistical Package for Social Sciences). The presentation of the data was done in three parts. Part one dealt with tourists in the Northern Province; part two covered the responses of tourism business owners/managers, and part three surveyed the Rwanda Development Board/Tourism and Conservation. In total 69 tables were presented and summarised. The following chapter interprets and discusses these results, and compares interpretations from the three classes of respondents.

CHAPTER FIVE

DISCUSSION ON THE FINDINGS OF THE DATA PRESENTATION IN CHAPTER FOUR

5.1 Introduction

The objectives of this study, as stated in the first chapter, are:

- To identify the **benefits** of tourism's economic development to the Northern Province and its people.
- To identify the main **stakeholders** in the tourism development.
- To determine the importance of **tourism proceeds** to the tourism economic development.
- To identify the main **beneficiaries** of tourism proceeds.
- To ascertain the **distribution** of tourism income.
- To identify the main **challenges** to tourism economic development in the Northern Province of Rwanda.

A presentation and analysis of the findings contained in chapter four are now considered, based on the three questionnaires:

Questionnaire 1 Tourists as respondents

Questionnaire 2: Tourism business owners/managers as respondents

Questionnaire 3: Rwanda Development Board/Tourism and Conservation as respondent.

The findings obtained from the three questionnaires are discussed in four common parts:

- Demographic characteristics,
- Destination choices,
- Tourist's contribution to tourism economic development, and
- Overall tourism economic development

5.2 Demographic characteristics

5.2.1 Tourists as respondents

The data confirms that the majority of tourists are young adults, mainly from the USA. This implies market drives are needed in other countries of origin, to increase the range of tourists as well as opening new markets. It should be of concern to the tourism authority in the Northern Province of Rwanda as to the low numbers of local and regional tourists.

5.2.2 Tourism business owners/managers as respondents

The majority of respondents manage the tourism business researched, and these have been operating for as many as 15 years. New businesses are opening in the Northern Province of

Rwanda, but at a slower rate than in the past. The fact that there is a growth in tourism enterprises indicates the need for economic development in the Province, which in turn will lead to job creation and possible poverty alleviation.

5.3 Destination choices

5.3.1 Tourists as respondents

5.3.1.1 Purpose of visit

Although there may be several reasons to visit the Northern Province, nine closed and one open reason were taken into consideration in this study. According to the respondents they firstly came for adventure, secondly to visit natural attractions, thirdly to visit wildlife, then for heritage/culture, followed by business and social (visiting relatives and friends) reasons, while others came for research and experience. This order is not surprising given the fact the most visited place in the Northern Province is the Volcano National Park, that offers many natural attractions and several adventure activities. The Province is able to attract tourists. The point is now to increase the attractions value of the Park by developing new and improved facilities to maintain its present status, and strive for improved features.

5.3.1.2 Source of information

There may be several sources of information which tourists can access about a destination; eight closed and one open source were taken into consideration in this study. According to tourist respondents, the majority obtained information about the Northern Province as a tourism destination from the internet; secondly via travel guides; from friends and relatives who had visited the Province before; through newspapers; tourist respondents who had visited the destination previously; through television and radio. It is not surprising that most tourist respondents obtained information from the internet because, as previously mentioned, most tourist respondents were international. More use must, therefore, be made of the printed media to expand tourist's interest in the attractions of the Province. However, with the continued expansion of the electronic media, and the "new breed" of international tourists seeking adventure as the motivation for travel, the interest probably holds the key for future marketing.

5.3.1.3 Advise friends, relatives or colleagues

Respondents in the Northern Province were asked if, upon their return, they would advise friends, relatives, and/or colleagues to visit the Northern Province. 86.2% confirmed that they would advise others to visit the Northern Province. This information is very important since it justifies tourists' satisfaction; a satisfied tourist attracts other tourists, and word-of-mouth marketing remains a major source for promoting attractions.

5.3.1.4 Retention of tourists

Respondents in the Northern Province were asked if they were likely to take another trip to the Northern Province in the next two years. Most respondents said they were likely to come back. This information strongly suggests that tourists to the Northern Province would be retained, and should provide a good source of expanding economic activities, which could lead to job creation.

5.3.2 Rwanda Development Board/Tourism and Conservation

5.3.2.1 Purpose of visit

Rwanda Development Board/Tourism and Conservation was asked to state the order of most preferred tourism activities in the Northern Province. The response was that gorilla trekking comes first, golden monkeys follow, and community walks take the third position. This information confirms the facts of section 5.3.1.1 where the majority of respondents came to the Northern Province of Rwanda for adventure and visits to natural attractions. The natural features of the Province must be used to expand the fledgling tourism industry to the benefit of the local communities living at, and around, tourism sites.

5.4 Tourism's contribution to economic development

To establish tourism's contribution to economic development use was made of different types of questions **for the three different groups** of respondents.

- Tourists as respondents (n=232),
- Business owners/managers as respondents (n=58),
- Rwanda Development Board / Tourism and Conservation as respondent (n=1).

5.4.1 Tourists as respondents (n=232)

5.4.1.1 Tour package arrangement

Tourist respondents in the Northern Province were asked if their visits were arranged as a tour package. The majority responded that their visits were arranged as a tour package, while some arranged a tour themselves; this information differs from the general information obtained from Rwanda Development Board/Tourism and Conservation, which suggested that most tourist visits were arranged by tour operators. It is economically important for the tourism industry in general that visits are arranged by tour operators because the tourist expenditure generates income for more than one sector, thus boosting the economy of the Province.

5.4.1.2 Tour package costs

Tourists contribute between 500,001 and 10,000,000 RWF (approximately between US\$ 833 and 16,667) each on a visit to the Northern Province. This is valuable income to the region and needs to be expanded, through increasing tourist numbers to important attractions, and providing value-for-money services which should encourage more tourism, and the retention of current visitors.

5.4.1.3 Tour package inclusion

Respondents were asked what was included in the tour package. It is very important to know which sectors benefit most from tour packaging. Respondents reported that accommodation and transport was included in their tour packages. Many tourists appear to include accommodation and transportation in their tour packages. This impression creates a valuable opportunity for tour operators to expand their business, and the economy of the Province, by arranging tailor-made packages for arriving tourists. Pre-sold packages do not necessarily improve the economic climate, nor tourist's perceptions, of the accommodation and transport facilities available to visitors.

5.4.1.4 Type of accommodation

Respondents were asked which type of accommodation they choose stay at; this was to establish the most preferred type of accommodation in the Province for future accommodation planning. Tourists, especially those classed as adventurers or back-packers, are likely to prefer

cheap but quality accommodation rather than the four or five star offerings. Many tourists stay in Kigali, the capital of Rwanda and about 70 kms from the attractions in the Northern Province. This is a significant source of income that should be channelled into the Province.

5.4.1.5 Tourism sub-sector contribution in terms of the number of tourists serviced

Although it was not asked as a direct question but was referred to in chapter four, knowledge of the number of tourists serviced by tourism sub-sectors is very important to know the contribution to each of the sectors. Study results show that 96.6% of respondents visited attractions; 93.1% needed services from the food and beverage sector; 79.3% needed service from the transportation sector; 74.6% needed accommodation; 65.1% needed travel services, and 41.8% benefited from the recreation and entertainment sector. This information is vital to challenge the distribution of income among sub-sectors; to know where future planning is needed, and to protect the sub-sectors that are profitable from possible exploitation which could lead to job losses and further poverty.

5.4.1.6 Tourism sub-sector earnings from total tourism revenue

Respondents were asked the approximate amount they spent /were going to spend during their stay. This information is important to establish how the presence of a tourist in the Northern Province can benefit tourism sub-sectors. The transportation sector, accommodation and attractions earned the most income. This information shows that a tourist in the Northern Province benefits travel and accommodation services most and again highlights the areas that need improvement to boost the economy of the Province.

5.4.1.7 Daily average consumption per tourism sub- sector

The survey tried to establish the average daily consumption of tourism products and services. In total, approximately 12,295,550 RWF (US\$ 205,00) is generated by tourists in the Northern Province. These monies, if properly administered, should filter to local communities through the economic multiplier, which could boost job creation, thus justifying the use of tourism to improve the livelihood of the inhabitants of the Province.

5.4.2 Business owners/managers as respondents

5.4.2.1 Number of employees in 2010

Tourism business owners/managers were asked to specify their number of employees; 58.6% of respondents employed between 1 and 19 employees; 25.9% employed between 20 and 39 employees; 8.6% employed between 60 and 79 employees while 6.9% employed between 40 and 59 employees. The results, and the trends, support the use of tourism as an economic generator of wealth.

5.4.2.2 Employees from the Northern Province

Tourism business owners/managers were asked to specify the percentage of their employees that were originally from the Northern Province. 75% of the total number of employees are originally from the Northern Province of Rwanda, which justifies the importance of jobs in the tourism industry for local communities, and the improvement of the economic wellbeing of these communities through job creation and poverty alleviation.

5.4.2.3 Number of employees in their first years of operation

Tourism business owners/managers were asked to specify the number of employees employed in the first year of operation. 84.5% of respondents employed between 1 and 19 workers in their first year; 12.1% employed between 20 and 39 employees while 3.4% employed 40 and 59 employees in their first year.

Table 5.1 Comparison between number of employees in 2010 and number of employees in the first of existence

Number of employees	Number of businesses first year of existence (Section 5.4.2.3)	Number of businesses in 2010 (section 5.4.2.1)	change	Change in %
1-19 employees	49	34	-15	-30.6
20-39 employees	7	15	8	114.3
40-59 employees	2	4	2	100
60-70 employees	0	5	5	500
Total	58	58	0	0

Table 5.1 shows that the number of employees increased for all surveyed tourism businesses between the first year of existence and 2010. While the number of tourism-related businesses have not increased over the years, the employment in these organisations has increased, becoming larger and therefore able to provide a better service to potential clients. This increase could be attributed to the cessation of civil unrest which has led to an increased interest in natural tourism in Rwanda. Any increase in work position would certainly improve the economy of the Province.

5.4.2.4 Tourism businesses monthly turnover in 2010

Tourism business owners/managers were asked to specify their monthly turnover in 2010. The survey revealed that sales ranged between 19 and 59 million RWF (approximately 31, 667 and 98,333 US\$)

5.4.2.5 Tourism businesses monthly turnover in their first years of operation

Tourism business owners/managers were asked to specify the monthly turnover they had in the first years of operation. The income ranged between one and 19 million RWF. The following table compares tourism business' turnover in the first year of existence and 2010.

Table 5.2 Comparison between the monthly turnover in 2010 and monthly turnover in the first year of operation

Turnover	Number of businesses in first year of existence	Number of businesses in 2010	change	Change in %
1 million and below	36	6	-30	-83.3
1-19 million	22	33	11	50.0
20-39 million	0	15	15	1500.0
40-59 million	0	4	4	500.0
Total	58	58	0	0

Table 5.2 shows that business turnover increased for all surveyed tourism businesses between the first year of operation and 2010. This increase in turnover of tourism businesses, which in turn contributes to economic development of the Province through taxation, must be sustained. Following from the information in Table 5.1, the general increase in income relates to the change in the size of organisation, and, for the same reasons suggested in section 5.4.2.3, must be

viewed as positive for the economy of the Province, and the sustained growth in job potential. However, tourism growth (and improved job security) is dependent on a stable political climate in the Northern Province.

5.4.2.6 Number of clients per sector in 2010

Tourism business owners/managers were asked to specify the number of clients they serviced on average in 2010. The survey revealed that between 1 and 20 000 clients were serviced in this period.

5.4.2.7 Number of clients per sector in the first years of operation

Research findings revealed that only between 1 and 10,000 tourists visited organisations in the first year of operation.

Table 5.3 Comparison between the numbers of clients in 2010 and in the first year of operation

Number of clients	Number of businesses first year of existence	Number of businesses in 2010	change	Percentage (%)
1 thousand and below	44	23	-21	-47.7
1-10 thousand	14	29	15	107.1
11-20 thousand	0	6	6	600.0
Total	58	58	0	0

Table 5.3 shows that the number of clients who visited tourism organisations increased for all surveyed businesses between the first year of operation and 2010. Businesses that had one thousand clients or less in their first year of operation decreased from 44 to 23 in 2010. This means that all businesses received more clients over the years. This increase in the number of clients at tourism businesses contributes to the economic development of the Province through increased tax earnings.

5.4.3 Rwanda Development Board

5.4.3.1 Arranging package

While many respondents made their own tour arrangement without relying on tour operators, the Rwanda Development Board/Tourism and Conservation were of the opinion that tour operators

arranged tour package for the majority of tourists in the Northern Province. This research, therefore, solved the misconception of the Board regarding the importance and relevance of the tour operating sub-sector. This information should lead to a revision of the Boards' attitude to the tourism sub-sectors, and hopefully to improved co-operation

5.4.3.2 Maximum number of tourists permitted to visiting the Volcano National Park per day

The Rwanda Development Board/Tourism and Conservation in the Northern Province has specified that 100 is the maximum number of tourists allowed per day to visit different tourism activities in the Volcano National Park. This information was needed because the potential number of visitors has both positive and negative implications.

Positive economic impact: the higher the number of tourists in the region the higher the potential earnings, tax contribution to the Province, and job creation.

Negative environmental impact: the higher number of tourists in the Park the more the environment could be damaged. This is a delicate problem. Tourism in the Northern Province relies heavily on the natural environment. If it is not carefully managed it could be irreparably damaged which could spell the end of tourism, reduced tax contributions to the government, and the loss of jobs leading to further poverty of local communities. On the other hand, carefully managed increased tourism activity should benefit all stake-holders.

5.4.3.3 Costs of different tourism activities in the Volcano National Park

The Rwanda Development Board/Tourism and Conservation controls the cost for different tourism activities in the Volcano National Park. The research revealed that domestic tourists pay considerably less than international visitors to the following tourism activities: gorilla trekking, viewing the golden monkeys, Bisoke, the Diane Fossey tomb, and Karisimbi.

Table 5.4 Costs of tourism activities in the Volcano National Park (RWF)

Tourism activity	Domestic tourists	International Tourists	Difference
Gorilla trekking	20,000	300,000	280,000
Golden monkeys	4,000	150,000	146,000
Bisoke	4,000	150,000	146,000
Diane Fossey tomb	4,000	150,000	146,000
Karisimbi	30,000	150,000	120,000

Table 5.4 shows that international tourists pay 1,400% more compared to domestic tourists for gorilla trekking; 3,650% more for golden monkeys tours, Bisoke, the Diane Fossey Tomb and 400% more for Karisimbi. Local costs have been reduced to motivate domestic tourists to visit the Volcano National Park, while international guests, most of who can afford the higher prices, help contribute to tourism development and poverty alleviation in the Province.

5.4.3.4 Projects in which the Rwanda Development Board/Tourism and Conservation is involved that benefit local communities

Rwanda Development Board/Tourism and Conservation in the Northern Province is involved in the following projects that could benefit local communities.

- School building; Livelihood formation
- Health centre; livelihood formation
- Girinka Program; livelihood formation
- Bee keeping; livelihood formation
- Mushroom projects. livelihood formation

All of the projects have the aim of community advancement. These actions justify the direct contribution (economic development) of the tourism industry in the Northern Province, for the local communities.

5.4.3.5 Number of employees working for the Rwanda Development Board originally from the Northern Province

RDB confirmed that 75% of the total number of employees are originally from the Northern Province. This high percentage justifies the direct employment policy of the Board in employing local communities, and the economic development resulting in the Northern Province of Rwanda.

5.4.3.6 Rwanda Development Board/Tourism and Conservation monthly turnover and number of visitors on average

Rwanda Development Board/ Tourism and Conservation estimates its monthly turnover as 360,000,000.00 RWF (approximately 600,000.00 US\$) and estimates its monthly visitors to be 1200, an average of 300,000.00 RWF (approximately US\$ 500.00), and justifying an effort on the part of the Board to promote tourism.

5.5 Overall tourism economic development

5.5.1 Tourists as respondents

Tourist respondents were asked to rate the level of satisfaction for the different tourism services received during their stay in the Northern Province of Rwanda. Generally, tourists are positive about the services received, but the need for improvement is noted and the need for skills development and training must be followed-up.

5.5.1.1 Recommendations for tourism sub-sectors development

The service ratings of the different sub-sectors differs but is positive, the survey reveals that the majority of respondents perceived all tourism sub-sectors as good. This is positive and therefore tourism planners/developers should maintain efforts.

5.5.1.2 Perception of services in different sub-sectors

The service score of the different sub-sectors differs but is positive. The survey reveals the following:

- Public transport is the chosen mode of travel. This creates the responsibility on providers to ensure quality vehicles and drivers.
- The major port of entry remains Kigali International Airport. This being the case, the facility should be constantly maintained to meet international standards which, at the same time, would ensure employment for local contractors.
- General businesses were highly scored for friendliness, helpfulness and cleanliness, as well as customer care and value-for-money.

This positive situation justifies action to retain, and attract, tourists to the Province, which is good for economic development.

5.5.2 Perceptions of business owners/managers

5.5.2.1 Tourism profitability in 2010

Tourism owners/managers were asked to rate the profitability of their businesses. The findings show that tourism businesses owners/mangers are happy with the financial status of the business, noting that they are not planning to quit the tourism business, but rather that they may expand, thus generating more jobs for local communities. Others who benefit from the profits that these businesses made include the Government of Rwanda through tax payments and

creation of jobs, while local communities benefited from tourism businesses located in their Province through jobs and supply of products to businesses.

5.5.2.2 Tourism economic development in the Northern Province

Tourism businesses owners/managers were asked to rate the overall status of tourism economic development in the Northern Province. Findings show that 53.4% of the respondents perceived that tourism is growing and 46.6 % that tourism is growing fast. One may logically say that if tourism is growing, businesses will grow, more jobs in tourism should be created, and local communities could enjoy additional employment.

5.5.2.3 Average daily expenses and average length of stay

Owners/managers were asked to estimate clients' daily expenses, and average length of stay. The survey reveals that daily expenses ranges between 18,333.30 and 183,900 RWF (approximately between 30 and 306 US\$) for different tourism products and/or services receive in the Northern Province, while the length of stay ranges between 1 and 10 nights. Diversification of tourism products and services is needed in order to maintain this interest and to expand in the future.

5.5.2.4 Most interesting tourism activities in the Northern Province

Tourism owners/managers were asked to identify those tourism activities preferred by their customers. Respondents assumed that most clients come to visit natural attractions and for wildlife adventure. Business and trading were also drawcards, as was health tourism.

5.5.2.5 Efforts of the Government of the Northern Province to develop tourism and to promote economic development

The owners/managers were asked to evaluate the efforts of the Government of the Northern Province in developing tourism and in promoting economic development. 70.7% of respondents confirm that the efforts of the Government in developing tourism score high, confirming a positive perception towards the Government.

5.5.3 Rwanda Development Board/Tourism and Conservation as respondents

5.5.3.1 Trends of tourists between 1995 and 2010 to the Volcano National Park, and the Mountain Gorillas

The Rwanda Development Board/Tourism and Conservation was asked to specify the tourist numbers between 1995 when tourism was first identified as having economic developmental potential, and 2010.

Table 5.5 Trend in tourist arrivals who visited the Volcano National Park from 1995-2010

Year	Number of visitors	Change	Percentage (%)
1995	1200		
1996	800	-400	-33.3
1997	0	-800	-100
1998	0	0	0
1999	850	850	0
2000	6800	5950	700
2001	7100	300	4.4
2002	7300	200	2.8
2003	7476	176	2.4
2004	8593	1117	14.9
2005	10641	2048	23.8
2006	14507	3866	36.3
2007	18380	3873	26.7
2008	19970	1590	8.7
2009	18844	-1126	-5.6
2010	22733	3889	20.6

Table 5.6 Trends of tourists who visited mountain gorillas from 1995-2010

Year	Number of visitors	change	Percentage (%)
1995	1200		
1996	800	-400	-33.3
1997	0	-800	-100
1998	0	0	0
1999	850	850	0
2000	600	-250	-29.4
2001	700	100	16.7
2002	700	0	0
2003	6879	6179	882.7
2004	7747	868	12.6
2005	9276	1529	19.7
2006	12068	2792	30.1
2007	16068	4000	33.1
2008	117082	101014	628.7
2009	11556	105526	-90.1
2010	18488	6932	60.0

Tables 5.5 and 5.6 show that the number of tourists decreased between 1995 and 1998, probably due to the war in the region. From 1999 to 2008 the number of tourists increased constantly. The small decline in 2009 could be attributed to the global recession started in the United States of America in 2008. This is logical bearing in mind that the majority of international visitors are from that country. The decline in 2002 visitor number could be ascribed to the September 11 terrorist attacks on New York and other destinations of 2001.

5.5.3.2 Other beneficiaries

Rwanda Development Board/Tourism and Conservation in the Northern Province was asked who benefit from its profit. The following were listed as first beneficiaries:

- The Government of Rwanda: Tourism in the Northern Province contributes to the general economic growth of the country through direct investment and tax benefits.
- The Northern Province: Tourism creates employment opportunities and uplifts local communities.
- Local communities: The Northern Province contributes to the livelihood of local communities through business development, employment, development of projects for livelihood.

5.6 Chapter summary

This fifth chapter's findings were discussed, in four different parts:

- Demographic characteristics;
- Destination choices;
- Tourism's contribution to economic development, and
- Overall tourism economic development

Under each of the above parts the following questionnaires were considered:

- Tourists as respondents
- Tourism business owners/managers as respondents
- Rwanda Development Board/Tourism and Conservation in the Northern Province as respondent.

Results reveal that the number of tourists in the Northern Province is increasing and that most tourists come for adventure and to visit the natural attractions mainly the mountain gorillas in the Volcano National Park. Most tourists obtain information via internet before visiting the region, and generate an income that ranges between 500,000 and 900,000 RWF (between US\$ 833 and 1500 US\$) monthly for tourism activities. Respondents are likely to visit the Northern Province again within the next two years, and would definitely tell their relatives and friends about their experience. The majority of tourists did not arrange a tour package to visit Rwanda. Respondents stayed in 1 to 3 star hotels during their stay of one to 10 nights. Tourists were satisfied with the services provided by the travel services sector; accommodation, transportation, food and beverage and entertainment and recreation. Respondents agreed that the tourism industry, in general, is doing well in terms of service delivery, but that there was a room for general improvement.

The survey revealed that most business respondents were managers and that the number of employees, the level of turnover, size of business and the number of clients in 2010 was higher compared to the first year of business. This augers well for development of the tourism industry in the Northern Province. The results show that the Government of Rwanda, the Government of the Northern Province, and local communities benefit from tourism through tax payments and employment, thus contributing to the economic development of the country in general. Respondents perceive that the efforts made by the Government to develop tourism, and to promote economic development in the Northern Province, are highly regarded. Findings suggest that there should be diversification of products and services to maintain tourism growth and that

a modern airport is needed so that tourists can access the Northern Province without any stopovers. Training of human resources is also advocated.

Diversification of activities was needed to attract more tourists, and maintain the existing visitors for longer periods. The results show that international tourists pay more than domestic tourists for visiting tourism activities in the Volcano National Park, which supports tourism development. The Board was involved in five projects that directly benefit local communities, and that most of its employees are from the Northern Province, which directly benefits local people from tourism.

5.7 Conclusions

There can be little doubt of the economic benefits of increased tourism to the Northern Province. All sub-sectors were highly scored by tourists, and each is intertwined in the tourism industry. The next chapter, number six, concludes the study, with recommendations for an improved Rwandan tourism economy.

CHAPTER SIX CONCLUSIONS AND RECOMMENDATIONS OF THE STUDY

6.1 Introduction

The initial purpose of this research was six fold:

- It endeavoured to identify the **benefits** of tourism's economic development for the Northern Province and its people.
- It tried to identify the main **stakeholders** in tourism development in the Northern Province of Rwanda.
- It determined the importance of **tourism proceeds** for the tourism economic development of Northern Province and its people.
- It identified the main **beneficiaries** of tourism proceeds in the Northern Province of Rwanda.
- It ascertained the **distribution** of tourism income in the Northern Province of Rwanda, with the aim of establishing whether the principle of equity (equal distribution of income/wealth) was being followed.
- It identified the main **challenges** of tourism economic development in the Northern Province of Rwanda.

With the aid of the research data, the following key findings were obtained.

6.2 Key findings and study summary

The findings are classified into four parts:

- Demographic characteristics.
- Destination choices.
- Tourism contribution to economic development.
- Overall tourism economic development.

6.2.1 Demographic characteristics

The findings reveal that the majority of travellers to the Northern Province of Rwanda are aged between 31 and 40, more males than females, with an income ranging between 500,001 and 600,000 RWF (approximately between 833 and 1,000.00 US\$), with post school certificate qualifications. International tourists dominate inbound tourism in the region. This indicates an above average person who, through income, qualifications and interest, **should add value to the economy of the Northern Province.**

6.2.2 Destination choices

- The findings reveal that the primary reason/motivation for visiting the Northern Province of Rwanda is adventure, and visits to natural attractions. Tourists obtained **information** about the Northern Province primarily via the **internet**.
- The findings also reveal that tourists would definitely tell their relatives and/or colleagues about their experiences during their stay in the region. They would possibly return to the Northern Province within the next two years. This is positive since tourists must be **retained and others attracted to ensure the continued economic growth of tourism**.

6.2.3 Tourism contribution to economic development

The findings reveal that:

- Tour packages ranged between 600,000 and 10,000,000 RWF (approximately between 833.34 and 16,666.67 US\$) and mainly included accommodation and transportation. Tourists in the Province prefer to stay at 1 to 3 star hotels and at 4 to 5 star hotels than in other types of accommodations, where they spend between 1 to 10 nights, while other tourists do day trips. This may be justified by the relatively short distance between the Northern Province and Kigali (the capital city), so tourists prefer to visit the Northern Province and return to Kigali the same day. **This has a negative economic impact on the region since the economy of Kigali, therefore, benefits more than the Northern Province from the tourist spend.**
- Tourism sectors complement one another in servicing tourists; tourists need services from travel agents/operators, accommodation, transportation, and food and beverage outlets, but fewer services from the entertainment and recreation sector. **The transportation sector appears to benefit more than other sectors.** This is logical as tourists must travel to reach accommodation and attractions.
- There is a pleasing increase in the number of employees, numbers of clients, and turnover in all types of tourism businesses, over the study period. **This strongly suggests that tourism industry in the Northern Province is growing.**
- Of the total number of employees working for the Rwanda Development Board/ Tourism and Conservation in the Northern Province, 75% are originally from the Northern Province. **This is positive since local people directly benefit from tourism through employment, and the economy grows through the multiplier effect of income on the communities.**
- The Rwanda Development Board/Tourism and Conservation **is involved in five projects which benefit the local communities.**

Rwanda Development Board/Tourism and Conservation in the Northern Province estimates its monthly turnover to be approximately 360,000,000.00 RWF and estimates its visitors to be 1200 monthly. **A steady flow of quality tourists ensures constant word-of-mouth marketing and a contribution to the economy of the Province.**

6.3 General conclusions

The findings reveal that:

- Tourists considered services provided by travel **services, transportation, accommodation, food and beverage, and entertainment and recreation to be excellent** and where there is some dissatisfaction it is due to a delay in service delivery.
- Tourists considered the **development of the travel sector, transportation, accommodation, food and beverage and entertainment and recreation sectors is positive**, but much more emphasis must be paid to customer care.
- The main means of transport to the Northern Province are motor coaches, and the main port of entry for international tourists is Kigali International Airport, since there is no airport in the Northern Province.
- Tourists perceived people in the Northern Province as friendly and helpful; they also confirm that the Northern Province is generally clean; the value-for-money of outlets to be reasonable; the banking system is appropriate to travel needs. **This is positive because tourists do not only consider direct service providers, but also consider all peoples and institutions** that they interact with during their stay.
- The number of **tourists and number of tourism businesses is increasing**, which justifies the development of the tourism industry in the Northern Province of Rwanda.
- The efforts of the Government of the Northern Province **to develop tourism and promote economic development are highly appreciated**. It is developing infrastructure, like roads, that facilitates tourist access to different attractions around the province.

6.4 Recommendations

The recommendations for this study are classified in three parts:

- By tourists in the Northern Province of Rwanda;
- By tourism business owners/managers in the Northern Province of Rwanda, and
- By the researcher.

6.4.1 Recommendations by tourists

Tourist respondents in the Northern Province recommend that **customer care must be improved** as far as service delivery is concerned. As said in the conclusions, where little dissatisfaction was noted, dissatisfaction was usually due to delays in service delivery. Tourism planners/developers should therefore **seek ways of training employees working in the tourism industry in customer care**, especially in service delivery. Services delivered to tourists must be effective and efficient.

6.4.2 Recommendations by tourism business in the Northern Province

Tourism business respondents in the Northern Province recommend the following:

- Attraction of more tourists to the Province: they suggested that there should be a **strong marketing strategy** that would attract more tourists to the Province. The higher the number of tourists, the higher the profits they make, the greater the benefits to all stakeholders.
- Create new, and develop existing attractions in the Province: they suggest that **existing attractions should be developed and upgraded and the creation of new attractions/activities** is needed. Tourism planners/developers should create new attractions so that tourists **could be retained longer** to visit different attractions. Genocide tourism is a case in point, commemorating in 1994 atrocities. The longer the length of stay, the more the expenditure and the more the industry earns, which will, again, benefit all stakeholders.
- **Diversify tourism products and services:** Business persons suggest diversification in tourism services and products; this attracts tourists with different motivations. More tourism services and products are diversified, the more tourists with different needs visit, and the greater the economic development of the Province.
- **Market the Northern Province as a tourist destination:** Business people suggested that the Northern Province should be better marketed (including the internet) in both the local and international markets with the aim of attracting more tourists to the region.
- The suggestion is **to construct a modern airport** in the Northern Province: The suggestion to construct a modern airport **so that tourists can directly access the region**. This increases tourist's expenditure in the Northern Province, and will create jobs ensuring economic growth.
- Train human resources in the field of tourism and hospitality management: The business sector considered that the tourism industry in the Northern Province lacks highly qualified human resources. It is recommended that tourism planners/developers **should train human resources in the field of tourism and hospitality capable to communicate, understand, and provide tourism services and products in a professional way**.
- Provide loans to business people who want to start or expand their tourism businesses: they suggested that facilitation should be given to them to **access loans for expanding or creating new businesses**.

6.4.2 Recommendations by the researcher

- Tourism marketing: Marketing **strategies must be developed to expand the different sources of information**, thus ensuring reaching a wider market. The findings indicated that most tourists obtained information on the destination prior to departure for Rwanda via internet. Alternate sources, like magazines, newspapers, travel guides, television and radio must also be used, and suitably developed to promote tourism.
- Promotion of domestic tourism: Findings show that, despite domestic tourists paying far less than international tourists, **they are not interested in tourism products and services** in the Northern Province. This can be done via different channels of communication that are accessible by locals, like local radios, local newspapers, local television, and where locals are encouraged to visit different attractions that are in the country.

- Promotion of regional tourism: Findings reveal that tourists from the region (neighbouring countries) are few; therefore, promotion of tourism products and services is needed to develop the whole region to the benefit of the Northern Province. This can be done via different channels of communication that are accessible by locals in the region, like local radios, local newspapers (for example, tourism travel guides can be distributed in different planes or buses) so that locals in the region can fully access information concerning tourist attractions in Rwanda.
- Evaluation of tourism success: The 'success' of tourism in the Northern Province **must be evaluated, not only in terms of 'arrivals', but also in terms of economic and social benefits it contributes**, and of the limiting of the negative environmental and social impacts. This will make tourism in the region become sustainable.
- Encourage the **consumption of local products**: This will directly benefit local communities. This can be done by motivating communities to make available their local products near to tourist destinations so that tourists can easily access them.
- Encourage day-trippers to stay over: This can be done by increasing the length of stay of tourists. It can be done by providing diversified tourism activities, thus motivating them to stay longer, and tour guides should tell tourists about all possible tourist attractions that are available in the region and not limit the information to one or two attractions.

6.5 Summary of recommendations

Although recommendations for this study are classified in three parts, namely tourists, tourism business owners/managers, and the researcher, they have many similarities. Construction of a modern airport, diversification of tourists products and services, marketing of tourist products and services, training of human resources in the field of tourism and hospitality, the encouragement of consumption of local products, promotion of domestic and regional tourism, and the evaluation of tourism success. As it has been agreed by the researcher in the consent letter before undergoing this research, Rwanda Development Board will get full access to the final dissertation so that they can improve their services and not merely for information purposes, which will help them in their tourism development decision-making. We bring these recommendations to its attention. A call for further research in **analysing tourism' economic development in other Provinces of Rwanda and Rwanda in general**, is identified in order to create and develop tourism in the country that contributes to the economic development of the country and its people.

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APPENDICES

APPENDIX A: MAP OF THE NOTHERN PROVINCE OF RWANDA



APPENDIX B: MAP OF RWANDA



APPENDIX C: MOST VISITED TOURISM PRODUCT IN THE NORTHERN PROVINCE

MOUNTAIN GORILLA



APPENDIX D: CONSENT LETTER



Kigali, 26/04/2010
Ref: RDB /04 /27/04/10

CONSENT LETTER

I have read the information presented in the information letter about a study to be conducted by **Mr. Mugisha RURANGWA** of the Department of Tourism and Event Management at the Cape Peninsula University of Technology.

I am aware that I have that the intention of this research is for academic purpose.

I am also aware that the researcher will send questionnaires to tourism business operators in the northern province of Rwanda in order to gain their views but quotations will be anonymous.

I was informed that respondents may withdraw at any time without penalty by advising the researcher.

I am aware that this letter is to serve for the compliance with ethics clearance at the Cape Peninsula University of Technology in regards with the researcher's thesis on "AN ANALYSIS OF TOURISM ECONOMIC DEVELOPMENT IN THE NORTHERN PROVINCE OF RWANDA".

I was informed that if I have any comments or concerns relating to this research, I may contact the following:

NAME	POSITION	TELEPHONE	EMAIL
- Dr REEDWAAN Ismail	<i>HOD: Tourism and Events Management and Supervisor of the research</i>	+27 (0) 21 460 3022	ismailr@cput.ac.za
- Ms Tahira Makda	Reviewer panel chair	+27 (0)21 460 3908	makdat@cput.ac.za
- Prof. Davies	Head of Research ethics committee	+27 (0)21 680 1575	daviess@cput.ac.za
- <i>Mr. Mugisha RURANGWA</i>	Researcher	+27 (0) 716380186	amatum@yahoo.fr

I am also informed that the Rwanda Development Board/Tourism and Conservation will get full access to the final report, so that we can also improve the services we provide but also merely for information purposes which would help us in decision making.

With full knowledge of all foregoing, I agree and consent the researcher to carry out this research and the Rwanda Development Board/Tourism and conservation welcomes that research and promises full cooperation.


Rwigamba Rica

Head of Tourism and Conservation

Rwanda Development Board (RDB)

Corner Blvd. de L'Umuganda (Airport Rd) & Nyarutarama Road, P. O. Box 6239, Gishushu, Kigali, Rwanda,
Web: www.rdb.rw

APPENDIX E: QUESTIONNAIRE (TOURISTS AS RESPONDENTS)

QUESTIONNAIRE CAPE PENINSULA UNIVERSITY OF TECHNOLOGY FACULTY OF BUSINESS

MTech: Tourism and Events Management (Questionnaire for Research Project)
Research Topic“ An analysis of tourism economic development in the Northern Province of Rwanda.”

- This research is being done for academic purpose as part of the requirements for the completion of a masters' degree.

You have been selected to respond to this questionnaire by the fact that you are a tourist in the Northern Province .Your contribution is needed to conduct an analysis of tourism economic development in the Northern Province of Rwanda.

This is purely for academic research .All information you will provide that may be personal will remain confidential.

How to complete this questionnaire

- Person completing this questionnaire should be a tourist in the Northern Province of Rwanda.
- Please place an “x” in the block that best describes your answer to the question, unless a detailed answer is needed.
- Should you wish to add a comment on this research? Please do so in the space provided.

All enquiries regarding this research and questionnaire may be addressed to:
Mugisha RURANGWA (Researcher) [Tel :\(+27\)71716380186](tel:+2771716380186) South Africa
(+250)0782032319 Rwanda
59 New Church Street (Cape Town) E-mail:amatusm@yahoo.fr

The researcher would like to express his sincere thanks for your valuable time and contribution to make this research possible .Your information and feedback is of paramount importance to the project. Your willingness is highly appreciated.

DEMOGRAPHIC CHARACTERISTICS OF RESPONDENTS

1. What is your age?

=20	21-30	31-40	41-50	51-60	61-70	>70 specify

2. What is your gender?

Male	Female

3. What is your country of origin?

Rwanda	Province
Outside Rwanda (Foreigner)	Country

4. Highest level of education?

No formal education	Primary completed	Secondary completed	Certificate/Diploma	Undergraduate degree	Postgraduate	Other specify

5. Please indicate your net monthly income in Rwandan Francs

Less than 100 000	100001 - 200000	200001 - 300000	300001 - 400000	400001 - 500000	500001 - 600000	600001 - 700000	700001 - 800000	800001 - 900000	900001- 1000000	Above 1000000

DESTINATION CHOICES

6. What is your primary reason/motivation for visiting the Northern Province of Rwanda?

Visiting natural attractions	Adventure	Social(VFR)	wildlife	Culture/Heritage	Business	Trading	Night life	Health	Other (specify)

7. Indicate the main sources of information on the destination used prior to departure to the Northern Province?

Television	Radio	Magazine	Newspaper	Internet	Travel guide	Previous visit	Friends or relatives who visited the Northern Province	Other (specify)

8. Would you advise friends, relatives, and /or colleagues to visit The Northern Province?

Yes ,definitely	Possibly	No, definitely not

8.1 If you answered negatively, please motivate your answer?

.....

9. Are you likely to take a trip to the Northern Province in the next 2 Years?

Yes, likely	Possibly	No, Not likely

9.1 If you answered negatively, please motivate your answer?

.....

TOURIST' S CONTRIBUTION TO TOURISM ECONOMIC DEVELOPMENT

10. Was your visit arranged as a tour package?

Yes	No

If yes what was the total cost per person? (RWF _____)

10.1 What was included in your package?

Transport	Accommodation	Food and Beverage	Coach tours	Car hire	Other (specify)

11. In which type of accommodation were/are you staying, and how many overnights stay did/will you spend during your stay in the Northern Province?

Type of accommodation	Number of nights
4-5 star Hotel	
1-3 star Hotel	
Guest house/B&B	
Private room /House Rental	
Private accommodation(friends/Family)	
Game Lodge	
Tented Camp	
Caravan Park	
Day trip	
Other (specify)	

12. Approximately how much money will you spend during your stay in the Northern Province?

- Travel services /Tour operators_____
- Transportation (including airfares) _____
- Accommodation_____
- Food and Beverage_____
- Visiting attractions_____
- Recreation and Entertainment_____
- Other services_____

a. For how many persons are these expenditures?

Myself	2 or more (specify)

13. Approximately how much money will you spend today? (Date :-----)

- Travel services /Tour operators_____
- Transportation (including airfares) _____
- Accommodation_____
- Food and Beverage_____
- Visiting attractions_____
- Recreation and Entrainment_____

13.1 For how many persons are these expenditures?

Myself	2 or more (specify)

OVERALL TOURISM ECONOMIC DEVELOPMENT

14. How would you rate your level of satisfaction?

Tourism 's sectors	Poor	Satisfactory	Good	Excellent	Exceeded expectations
Travel services					
Transportations					
Accommodation					
Food and Beverage					
Entertainment and Recreation					
Other (specify)					

14.1 If very poor, poor or satisfactory, what are you dissatisfied with?

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15. What would you recommend in the development of the tourism industry in the Northern Province?

Tourism's sectors	More emphasis	Good as it is	Neutral
Travel services			
Transportations			
Accommodation			
Food and Beverage			
Entrainment and Recreation			
Other (specify)			

16. How did you arrive in this region?

Personal automobile	Motor coach/Bus	Rental car	Taxi	Walked	Other(Specify)

17. What was your port of entry to Rwanda (foreigner tourists only)

Kigali International Airport	Gisenyi	Gatuna	Cyanika	Other entry (specify)

18. How would you rate your overall impressions/experiences of Northern Province in terms of the following?

	Good	Fair	Poor
Friendliness			
Helpfulness			
Cleanliness			
Value for money			
Banking			
Customer care			
Other (specify)			

If you wish to provide comments regarding this research, please use the space below:

If you would like the feedback, on this research, please write your email address in the space below:

E mail:

THANK YOU

APPENDIX F: QUESTIONNAIRE (TOURISTSM BUSINESS OWNERS/MANAGERS AS RESPONDENTS)

CAPE PENINSULA UNIVERSITY OF TECHNOLOGY

FACULTY OF BUSINESS

MTech: Tourism and Events Management (Questionnaire for Research Project)

Research Topic“ An analysis of tourism economic development in the Northern Province of Rwanda.”

- This research is being done for academic purpose as part of the requirements for the completion of a masters' degree.

You have been selected to respond to this questionnaire by the fact that you are operating in tourism industry in the Northern Province .Your contribution is needed to conduct an analysis of tourism economic development in the Northern Province of Rwanda.

This is purely for academic research .All information you will provide that may be personal will remain confidential.

How to complete this questionnaire

- Persons completing this questionnaire should be operating in tourism industry in the Northern Province of Rwanda.
- Please place an “x” in the block that best describes your answer to the question, unless a detailed answer is needed.
- Should you wish to add a comment on this research? Please do so in the space provided.

All enquiries regarding this research and questionnaire may be addressed to:

Mugisha RURANGWA (Researcher)

[Tel :\(+27\)71716380186](tel:+2771716380186) South Africa

(+250)0782032319 Rwanda

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The researcher would like to express his sincere thanks for your valuable time and contribution to make this research possible .Your information and feedback is of paramount importance to the project. Your willingness is highly appreciated.

RESPONDENT'S AND BUSINESS CHARACTERISTICS

1. What is your position in the business?

Owner of the organization	Manager of the organization	Public relations officer	Other (specify)

2. What is the main business/tourism sector of your organization?

Accommodation	Food and Beverage services	Recreation and Entertainment	Transportation	Travel services	Other (specify)

3. For how long has your business been in existence?

<1 year	1-4 years	5-9 years	10-14 years	15 and longer

3.1 If your organization has been in existence for more than 15 years, specify the number of years of existence.

4. What is the size of your organization? You must state whether in terms of staff, annual turnover, assets.

Micro	Small	Medium	Big

TOURISM ECONOMIC DEVELOPMENT

5. How many employees does your organization employ?

1-19	20-39	40-59	60-79	80-99	100 and above

a. If your company has above hundred employees, how many does it have?

- b. Of the total number of employees, how many are from the Northern Province of Rwanda?

6. How many employees did your organization start with?

1-19	20-39	40-59	50-69	60-79	70-89	80-99	100 and above

- a. If your organization started with above one hundred employees, how many did it start with?

7. What is the monthly turnover of your organization? (in Rwandan Francs)

1 million and below	1-19 million	20-39 million	40-59 million	50-69 million	60-79 million	70-89 million	80-99 million	100 million and above

- a. If your organization monthly turnover exceeds 100 million Rwandan francs, please indicate the turnover amount.
- b. If your organizations monthly turnover is below than 1 million Rwandan francs, please indicate the monthly turnover amount?

8. What was your organization turnover per month in the first year of existence?

(In Rwandan Francs)

1 million and below	1-19 million	20-39 million	40-59 million	50-69 million	60-79 million	70-89 million	80-99 million	100 million and above

a. If your turnover exceeded 100 million, please indicate the turnover amount?

b. If your turnover was below 1 million, please indicate the turnover amount?

9. How many clients does your organization service monthly?

1 thousand and below	1-10 thousands	11-20 thousands	21-30 thousands	31-40 thousands	41-50 thousands	51 thousands and above

a. If the number of clients is above 51 thousands, how many do you service?

b. If the number of clients is below 1 thousand, how many do you service?

10. How many clients did you service in the first year of existence?

1 thousand and below	1-10 thousands	11-20 thousands	21-30 thousands	31-40 thousands	41-50 thousands	51 thousands and above

a. If the number of clients in your company was above 51 thousands, how many did you service?

b. If the number of clients in your company was below 1 thousand, how many did you service?

OVERALL TOURISM ECONOMIC DEVELOPMENT

11. How would you rate your organization's profitability?

Very poor	poor	Satisfactory	Good	Very Good	Excellent

11.1 If you rate the performance as very poor, poor or satisfactory, what are you dissatisfied with?

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11.2 If you rate the performance as Good, very good, or excellent, who else is benefiting from your profit?

Government of Rwanda	Northern Province of Rwanda	Local committees (Rwandans)	Others (specify)

11.3 If your answer to question 11.2 is "government of Rwanda"; how is the government benefiting from your profit?

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11.4 If your answer to question 11.2 is "the Northern Province of Rwanda"; how is the province benefiting from your profit?

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11.5 If your answer to question 11.2 is “a Rwandan / local committees”; how are they benefiting from your profit?

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11.6 If your answer to question 11.2 is “others” who are they, and how are they benefiting from your profit?

.....

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.....

12. How would you rate the overall status of tourism economic development in the Northern Province of Rwanda?

Deteriorating	stable	growing	growing fast

13. How do you rate the number of tourists in the Northern Province?

Highly increasing	Increasing	Stable	decreasing	Highly decreasing

14. What is the average expense per day of your clients for:

Accommodation	
Transport	
Travel services	
Food and Beverage	
Recreation and Entertainment	
Other (specify)	

15. What is the average time spent, in the Northern Province of Rwanda?

16. What do you clients do/ what are they interested in?

Visiting natural attractions	
Adventure	
Wildlife	
Culture/Heritage	
Business	
Trading	
Nightlife	
Health	
Other (specify)	

17. How would you rate the efforts of the government of the Northern Province to develop tourism?

low	medium	High

18. How would you rate the efforts of the government of the Northern Province to promote economic development?

low	medium	High

19. What would you recommend to tourism planners and/or tourism developers in the Northern Province of Rwanda?

If you wish to provide comments regarding this research, please use the space below:

If you would like feedback on this research, please write your email address in the space below:

THANK YOU

APPENDIX G: QUESTIONNAIRE (RWANDA DEVELOPMENT BOARD/TOURISM AND CONSERVATION AS RESPONDENT)

**CAPE PENINSULA UNIVERSITY OF TECHNOLOGY
FACULTY OF BUSINESS**

MTech: Tourism and Events Management (Questionnaire for Research Project)

Research Topic“ An analysis of tourism economic development in the Northern Province of Rwanda.”

- This research is being done for academic purpose as part of the requirements for the completion of a masters' degree.

You have been selected to respond to this questionnaire by the fact that you are the Tourism warden in the Volcano National Park in the Northern Province .Your contribution is needed to conduct an analysis of tourism economic development in the Northern Province of Rwanda. This is purely for academic research .All information you will provide that may be personal will remain confidential.

How to complete this questionnaire

- Persons completing this questionnaire should be operating in tourism industry in the Northern Province of Rwanda.
- Please place an “x” in the block that best describes your answer to the question, unless a detailed answer is needed.
- Should you wish to add a comment on this research? Please do so in the space provided.

All enquiries regarding this research and questionnaire may be addressed to:

Mugisha RURANGWA (Researcher)

[Tel :\(+27\)71716380186](tel:+2771716380186) South Africa

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E-mail:amatusm@yahoo.fr

The researcher would like to express his sincere thanks for your valuable time and contribution to make this research possible .Your information and feedback is of paramount importance to the project. Your willingness is highly appreciated.

I. DESTINATION CHOICES

1. The majority of tourists in the Northern Province are (order of most visited attractions)

- 1) Interested in
- 2) Interested in
- 3) Interested in
- 4) Interested in
- 5) Interested in.....
- 6) Interested in

2. The majority of tourists in the Northern Province spend (number of nights)

Type of accommodation	Number of nights
4-5 star Hotel	
1-3 star Hotel	
Guest house/B&B	
Private room /House Rental	
Private accommodation(friends/Family)	
Game Lodge	
Tented Camp	
Caravan Park	
Day trip	
Other (specify)	

III. TOURISM'S CONTRIBUTION TO ECONOMIC DEVELOPMENT

3. The majority of tourists

Make the arrangements for themselves	Tour operators make arrangements for them

4. What is the maximum number of tourists allowed in the NPV per day?

5. What is the cost of visiting the NPV per person?

Domestic tourists	International tourists

6. The majority of tourists are

Domestic	International

7. Is there a project that RDB/tourism and conservation is it involved in for the benefit of the local community?

Yes	No

8. If yes how many?

9. If yes which ones?

Name of the project	Purpose of the project

10. How many employees does RDB/Tourism and conservation in the VPN have?

Less than 10 (specify)	11-20	21-30	31-40	41-50	More than 51 (specify)

11. Of the total number of employees, how many are from the Northern Province?

12. What is the monthly turnover of the RDB/Tourism and conservation in the VNP?

13. On average how many visitors do you receive monthly?

14. Trend of tourists in the VNP

Year	Year Number of visitors in the PNV
1995	
1996	
1997	
1998	
1999	
2000	
2001	
2002	
2003	
2004	
2005	
2006	
2007	
2008	
2009	
2010	

15. Trend of tourists visiting mountain gorillas?

Year	Year Number of visitors in the VPN
1995	
1996	
1997	
1998	
1999	
2000	
2001	
2002	
2003	
2004	
2005	
2006	
2007	
2008	
2009	
2010	

V. OVERALL OF TOURISM ECONOMIC DEVELOPMENT

16. How would you rate your organisation profitability?

Very poor	Poor	Satisfactory	Good	Very Good	Excellent

If you rate the performance as very poor, poor or satisfactory what are you dissatisfied with?

.....

.....

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.....

If you rate the performance as Good, Very good or excellent, who else is benefiting from you profit?

Government of Rwanda	Northern Province of Rwanda	Local communities	Others (specify)

If Government of Rwanda how?

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If Northern Province how?

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If local communities how?

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17. How would your efforts (RDB) to promote economic development in the Northern Province?

Low	Medium	High

If you wish to provide comments regarding this research, please use this space below

If you would like feedback on this research, please write your e mail address in the space below:

THANK YOU