

The Success of Tourism in Rwanda: Gorillas and More

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Rwanda is well known for its mountain gorillas. First brought to international attention by the conservation efforts of Dian Fossey in the 1960s and 1970s, Rwanda's gorillas have been featured in numerous documentaries and have been visited by well-known figures such as Bill Gates, Natalie Portman, and Ted Turner, all of whom have participated in Rwanda's annual gorilla-naming ceremony.

Rwanda and Uganda are currently the only two countries in the world where mountain gorillas can be visited safely, and the number of tourists visiting the Volcanoes National Park (VNP) has increased dramatically since the end of the war. Rwanda also views gorilla tourism as a valuable conservation tool, and as such enforces strict rules for the habituation of, and trekking with, gorilla families. Tourists are willing to pay high fees for a limited number of permits, which are usually sold out. Revenues from gorilla tourism provide funds to national parks and facilitate conservation activities.

Although Rwanda is known for its violent past, international perception of the country is shifting. As of 2010 Rwanda is considered one of the safest destinations in East Africa. This rebranding goes hand in hand with the marketing of the country and, in particular, the mountain gorillas. The revival of gorilla tourism demonstrates that with the right strategy, a postconflict country can successfully focus

on high-end tourism while maintaining conservation and contributing to poverty reduction through the involvement of communities.

Besides the VNP, Rwanda has two other national parks that offer a range of wildlife and biodiversity. Furthermore, the country has been particularly successful in attracting large numbers of business and conference travelers, mainly from the Democratic Republic of Congo and other neighboring countries of the East African Community (EAC).¹ This success is evidenced by the large increase in the number of hotel rooms, restaurants, and the planned construction of a convention center. Local and foreign direct investments have been substantial, accounting for 16 and 20 percent of total local and foreign direct investment, respectively, over the last 10 years. In terms of export revenue, tourism already outperforms coffee and tea by a wide margin.

Several key characteristics have contributed to the successful revival of the tourism sector in Rwanda. First and foremost, the government has shown a clear commitment to the development of tourism and has established Rwanda as a safe destination in the region. The early development of a strategy and policy demonstrated this commitment. Furthermore, the government involved the private sector from the start and has implemented policies that enhanced the business environment and promoted private sector

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investment in tourism, thereby marketing Rwanda as a destination. The business environment has improved markedly in recent years, promoting private sector involvement in tourism. In addition, Rwanda has always seen tourism as an instrument to reduce poverty, for example by directly involving local communities.

THE SUCCESS OF GORILLA TOURISM

Background: How did Rwanda start to develop gorilla tourism?

The Virunga mountain gorilla (*Gorilla beringei beringei*) is a highly endangered African ape subspecies, with a total estimated population of 380, that exists only in the Virunga Conservation Area encompassing Rwanda, the Democratic Republic of Congo, and Uganda (figure 14.1). The distribution of the Virunga mountain gorillas is limited to an approximate area of 447 square kilometers, which encompasses the Mgahinga Gorilla National Park in Uganda, the VNP in Rwanda, and the Mikeno sector of the Parc National des Virunga of the Democratic Republic of Congo (Gray et al. 2005). The VNP consists of about 160 square kilometers of montane forest. Until Rwanda's independence in 1962, the VNP was part of Africa's first national park, the Parc National Albert, which was created in 1925 with the intention of protecting the great apes (ORTPN 2004).

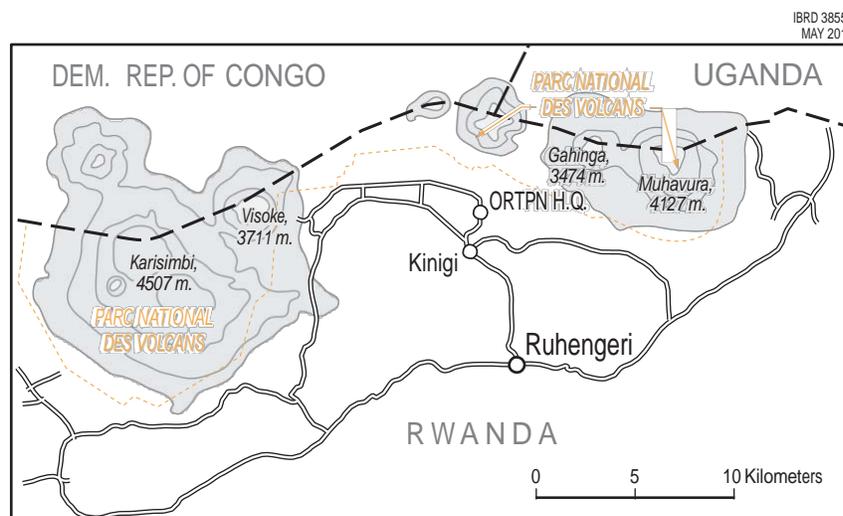
Tours to view wild mountain gorilla groups have been organized since 1955 (Butynaski and Kalina 1997), with

the first attempts at habituation for this purpose occurring as early as 1966 (Murnyak 1981). These early tourism programs displayed an almost complete lack of structure and control. The focus was on revenue rather than conservation, and there are many anecdotal reports of large groups of tourists visiting groups of nonhabituated or semihabituated gorillas (Fawcett, Hodgkinson, and Mehlman 2004).

In 1979 the Virunga region's first official mountain gorilla tourism program was launched by Bill Webber and Amy Vedder with funding from the African Wildlife Foundation, World Wide Fund for Nature, and Fauna and Flora International (Bush 2009). It was one part of the three-part approach of the Mountain Gorilla Project, which also included antipoaching and education programs. The gorilla tourism program had a dual purpose: providing the Rwandan government and park authorities an incentive to conserve the VNP and the animals within it from the threat of proposed conversion of 5,000 hectares of the VNP for agricultural purposes; and generating local employment and tourism-related revenue (Weber 1982, 1985; Vedder and Weber 1990). The program subsequently evolved into what is now the International Gorilla Conservation Program, still organized as a coalition of the three agencies (Bush 2009).

Two wild groups of gorillas were initially habituated for tourism visitation purposes, with strictly enforced limits on the number of visitors and length of visits (box 14.1). The combination of quality control and international interest in

Figure 14.1 Area of Distribution of the Mountain Gorillas



Source: Bush and Fawcett 2007.

Box 14.1 Current Rules Controlling Gorilla Tourism in Rwanda

A number of rules designed to protect both gorillas and tourists have been established, as follows:

- Maintenance of a distance of 7 meters between the tourists and the gorillas
- A maximum of eight tourists per visit
- A limit of one tourist group per day to each gorilla group
- A limit of one hour per visit
- Tourists who are visibly unwell or declare themselves to be ill may not visit

As of 1989 the number of tourists allowed in a single visit was increased to eight people (six people for smaller gorilla groups). In 1999 the required separation distance between tourists and gorillas (to reduce the risk of disease transmission) was increased from 5 to 7 meters. Other rules have been added over time:

- Minimum age of 15 years for tourists
- No flash photography

Source: Fawcett, Hodgkinson, and Mehlman 2004; Homesy 1999.

- Tourists must remain together in a tight group
- No loud noises or pointing
- Eating, drinking, and smoking are not permitted within 200 meters of the gorillas
- Tourists must turn away and cover their mouths when coughing and sneezing
- Human feces must be buried in a hole of a minimum depth of 30 centimeters
- No trash may be deposited in the park
- Tourists are not allowed to clear away vegetation to get a better view

These rules (adapted from Litchfield 1997) were designed and set to minimize behavioral disturbance and disease transmission to the gorillas from tourists. Although the welfare of the gorillas has always been the primary concern, the majority of these regulations were created based on expert opinions rather than specific research findings.

Dian Fossey's highly publicized gorilla studies resulted in steadily increased visitation throughout the 1980s, peaking around 6,900 in 1989 (ORTPN 2008b). By the mid-1980s local attitudes toward and political support for conservation increased significantly as a direct result of this program (Weber 1987). Stimulated by the attraction of gorilla tourism, Rwanda received almost 22,000 visits to its three national parks in 1990 (Bush, Hanley, and Colombo 2008), before conflict brought tourism to a halt.

Since the VNP reopened in 1999, visitation has rebounded from 417 visits that year to nearly 20,000 visits in 2008 (of which 17,000 were to see the mountain gorillas) (ORTPN 2008b). Gorilla visitation shows some amount of seasonality, with a peak in the number of permits sold between June and September (figure 14.2).

Factors contributing to the success of gorilla tourism

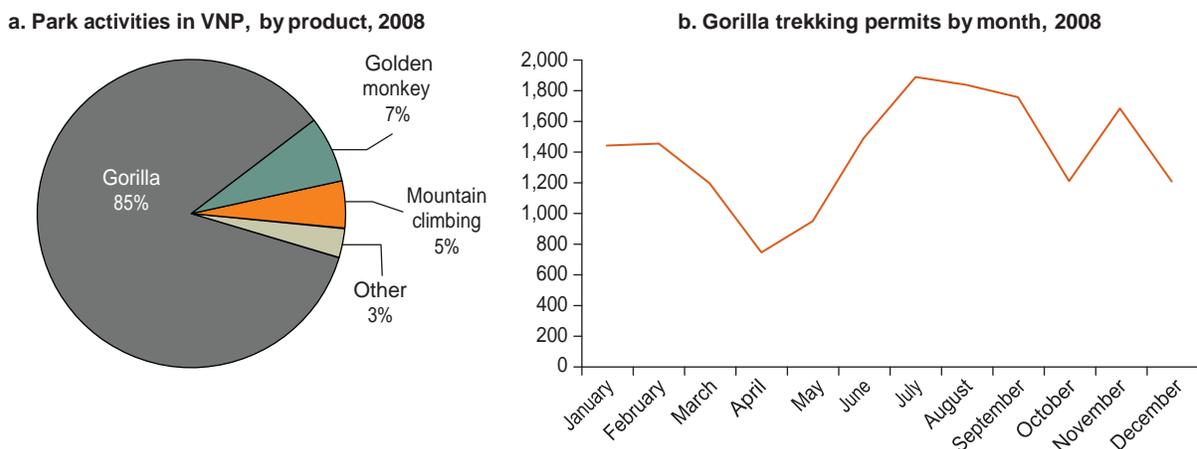
A number of factors have contributed to the success of gorilla tourism in Rwanda. A prerequisite is the relative ease of habituating mountain gorillas to the presence of humans, facilitated by the temperate climate and benign habitat. The only other country where mountain gorillas can currently

be visited safely is Uganda. With a broad client base² and a limited number of permits (around 17,000 per year), demand is higher than availability of permits. The accessibility of the gorillas is another advantage. Because of Rwanda's small size, tourists can reach the gorillas in two hours from Kigali; by comparison, it takes six hours to reach the gorillas from Kampala in Uganda. In addition, the condition of infrastructure in Rwanda, especially roads, is relatively good compared with that of its peers.

Besides viable tourism assets and relatively good infrastructure, Rwanda has shown a strong commitment to promoting the tourism sector. It has developed a clear tourism strategy, marketed the destination Rwanda successfully, involved the private sector in the policy dialogue, and generally improved the country's business environment.

Overall strategy and vision. Between 1994 and 2001 the Rwandan government worked to establish a tourism-friendly environment. The first meetings with the private sector on the development of the tourism sector were held in 1999. From 2000 onward Rwanda participated in major tourism fairs, and in late 2001 the Tourism Working Group, which included the public and the private sectors, was established. The Rwanda Tourism Strategy was developed

Figure 14.2 Gorilla Trekking in Volcanoes National Park



Source: ORTPN 2008b.

and approved by the Cabinet in 2002. A revised Rwanda Tourism Strategy (“Sustaining the Momentum”) was elaborated in 2007. A National Tourism Policy was put in place in 2006, a revision of which is currently under way. With support from the United Nations World Tourism Organization, the government of Rwanda has also prepared a 10-year Sustainable Tourism Development Master Plan (Republic of Rwanda 2002, 2007b, 2009a, and 2009b).

Rwanda’s overall strategic vision is to focus on high-end ecotourism rather than mass tourism. In the first Rwanda Tourism Strategy, three core market segments were identified: ecotravelers, explorers, and business travelers. The targets set in that document were soon surpassed, however, mainly through the success of the gorilla product. The revised strategy in 2007 identified the primates as Rwanda’s unique selling proposition but recognized the need to diversify the tourism sector and identified international conferences and birding as two additional core segments. Tourism receipts are already higher than the targets set for 2012 in the revised strategy. In the latest tourism policy, objectives are set within the framework of other national strategic documents, such as the Vision 2020 and the Economic Development and Poverty Reduction Strategy.

The Sustainable Tourism Development Master Plan for Rwanda consolidates previous strategies and policies, gives clear and detailed recommendations, and sets ambitious targets. Tourist arrivals to Rwanda are projected to increase from about 980,000 in 2008 to more than 2 million in 2020, with an expected increase in foreign exchange earnings from about \$200 million to more than \$600 million. Separate strategies are being developed for MICE (meetings,

incentives, conferences, and exhibitions) tourism and for birding activities (OTF Group 2008a, 2008b).

Although the different strategies have not yet been implemented completely, the Rwandan government has consistently demonstrated strong commitment to the execution of tourism-related reforms and to the overall improvement of the performance of the sector. Despite the limited number of staff in the Rwanda Office of Tourism and National Parks (ORPTN), its leadership has effectively led the advancement of reforms. Further, Rwanda has learned from the experience of other countries. Study tours have been undertaken to Kenya and Mauritius to learn from the tourism development strategies of those countries.

Marketing. Following the passing of formal tourism plans in Rwanda, a national campaign was launched to improve the image of tourism in the country. (The word for tourism in *Kinyarwanda*, the local language, means “wandering around aimlessly” and has therefore a negative connotation.) A media campaign was launched to sensitize the population and convey that the country can benefit from tourists and should therefore welcome foreigners. Simultaneously, Rwanda has worked to improve its image on an international basis. In the late 1990s international perceptions of Rwanda were primarily associated with the genocide. Even still in 2002 market research conducted in neighboring countries showed that more than half of international visitors believed that Rwanda was an unsafe destination (Grosspietsch 2006). Despite concerns about the safety situation, however, surveys carried out in 2003 showed that the satisfaction level of visitors in terms of safety and

stability was very high after they had visited the country (Grosspietsch 2006).

Specific public relations and marketing efforts pursued by Rwanda include contracting international public relations and marketing agencies in the United Kingdom and United States and launching a new Web site in 2003. In addition, Rwanda has been featured extensively in documentaries on international television channels and has received positive coverage in more than 350 credible international press publications, as well as in major travel guides. Rwanda has also represented itself well at major tourism fairs since 2000, earning first prize for the best African stand at the International Tourism Bourse in Berlin for three consecutive years, 2007–09, and at the World Travel Market in London in 2009. ORTPN's financing of travel fees for several Rwandan tour operators to these trade fairs has contributed to cooperation between the government and the private sector on issues related to tourism. To foster the interest of tour operators and travel agents in Rwanda, the government has also organized familiarization tours for international investors and tour operators, during which the Minister of Commerce and ORTPN have received the delegates to demonstrate the importance of their visit.

Rwanda's annual gorilla naming ceremony (*Kwita Izina*), launched in 2005, during which mountain gorillas born in the previous 12 months are named, has attracted a number of international celebrities. The baby gorillas have been named, among others, by the president of Rwanda and his wife, ambassadors, Hollywood stars, international conservationists, and performing artists. The ceremonies provide a good platform to promote Rwanda as a destination and the need for efforts to protect gorillas and conserve their habitat. The ceremony is now accompanied by several other events, including a cross-country cycling tour and a conservation conference. Thanks partly to the awareness of the need to protect the gorillas that the gorilla naming ceremony and gorilla tourism in general have brought about, poaching has been significantly reduced and the number of gorillas has increased steadily.

Improved business environment and involvement of the private sector. Initially, promotion of Rwanda's tourism sector was almost entirely driven and implemented by the government. The private sector lacked the capacity and funding and was not well organized. The government, however, made efforts to involve the private sector from the start with the long-term objective that the private sector would take over as the driving force for encouraging

tourism in Rwanda. As a result, there is now a strong public-private dialogue surrounding tourism in Rwanda, and a tourism working group composed of private and public stakeholders in the tourism industry is now in place. The private sector is consulted in the development of new policies and strategies, such as the Sustainable Tourism Development Master Plan. In addition, the private sector federation, of which the tourism chamber is a member, is consulted before new strategies and laws are adopted.

Rwanda has implemented a number of market-based reforms to strengthen the role of the private sector in tourism. Several important laws and codes have been revised, including the investment code, company law, secure transactions law, labor law, and insolvency law. The new insolvency law facilitates the access to finance, allowing movables, such as livestock, to be used as guarantee. Customs procedures are also being simplified. A pilot, one-stop-window was successfully launched at one border crossing, and plans are in the works to replicate it at other border posts.

Rwanda's business environment has also improved substantially in recent years. A one-stop-window has been introduced to register a business, and the administrative costs of registering a business have been lowered. It is now possible to register a business within one day for a flat fee of RF 25,000 (\$43). Rwanda's success in this area has been documented by a substantial improvement in the World Bank's *Doing Business* indicators: Rwanda was named the top performer in 2009. Rwanda outperforms all other countries in the EAC in the rankings and has shown a strong commitment to further improving private sector conditions, particularly in the tourism sector.

A number of tourism sector-related incentives are offered to investors. According to the investment code, tax exemptions are granted to investors who invest \$100,000 or more in a facility. Airplanes imported to transport tourists are tax exempt, and specialized vehicles such as hotel shuttles are exempt from import and excise duties. An investor in the tourism and hotel industry is also exempt from payment of import duties on equipment such as bedroom fittings, swimming pools, and outdoor leisure equipment.

BENEFITS OF GORILLA TOURISM

Implications for communities

Bush, Hanley, and Colombo (2008) note that the Virunga mountain gorilla represents an isolated island population in an upland area surrounded by a sea of humanity at some of the highest densities found on the African continent (in some areas of Rwanda, population density reaches 820 people per

square kilometer), and much of the land surrounding areas where gorillas live is inhabited by extremely poor people who derive their incomes from agricultural activities. Gorillas are severely threatened by anthropogenic disturbances such as agricultural conversion and illegal extraction of resources (for example, snare setting for smaller mammals that entrap young gorillas). While gorillas are no longer hunted for their meat in the Virunga range, they are the focus of illegal animal trafficking. Members of gorilla groups are killed and wounded in an effort to trap infants for the black market, sometimes leading to the disintegration of groups. This hunting pressure currently represents the greatest threat to the survival of the mountain gorillas and the integrity of their habitat. Illegal hunting is mainly motivated by meeting subsistence needs for the poorest people around the VNP (Plumptre et al. 2004).

To address local welfare needs to mitigate some of these poverty-related conservation threats, a key focus of contemporary conservation strategies is on local communities (Hulme and Murphee 2001). Combining conservation with local development through integrated conservation and development projects is now a standard approach in many developing countries (Barrett and Arcese 1995). Rwandan communities are involved in gorilla tourism in the following ways:

- **Creation of a department for community conservation** to work on local education and social infrastructure projects (Uwingeli 2009).
- **Revenue sharing:** Since 2005 ORTPN (which was absorbed into the Rwanda Development Board, or RDB, in early 2009), with the support of the government, has

overseen a revenue-sharing scheme whereby 5 percent of tourism revenues from VNP fees are injected into local community projects around the national park to ensure that the local people feel some ownership of the parks (box 14.2). Although it is not known what proportion of the budget of local councils is represented by the shared revenue, it is clear that local governments must be actively involved in selecting local projects to finance.

· **Employment opportunities** are offered through national parks: guides, trackers, and antipoaching agents, for example. Some of the private tour operators also offer community-based tourism activities, such as stays with local families, village walks, banana beer production, and even volunteer opportunities in local communities.

Disbursement of funds to communities. Since 2005 nearly \$428,248 has been directly invested in community projects and used to empower communities. The total amount, however, equates to an investment of only \$1.45 per person since the program's inception, or an average of \$0.36 per person per year. Projects for which funds have been used include education, environmental protection (tree planting, soil erosion control, and fencing in protected areas to limit access by poachers), food security, basic infrastructure, and water and sanitation (figure 14.3). Specific community projects have included construction of schools, water tanks, and hospitals; basket weaving; establishment of culture centers; potato farming; tree planting; bee-keeping; milk cooler construction; goat rearing; and mushroom and pepper farming. Education projects have received the most

Box 14.2 Process for Disbursing Community Funds

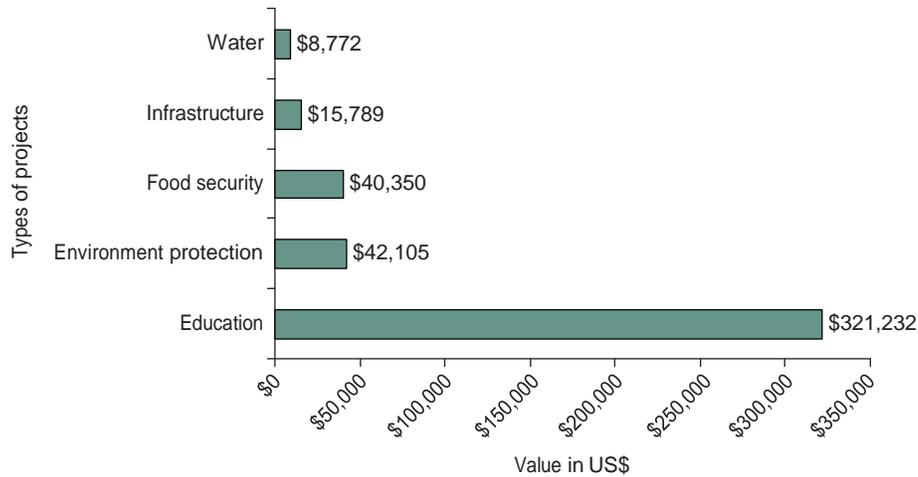
Five percent of tourism revenues from the protected areas in Rwanda are put into a fund for community projects in administrative sectors that neighbor national parks. The Rwanda Development Board issues calls for proposals, and a project selection process is completed at the sector and district levels. Selection criteria include positive impacts on local communities and on conservation of biodiversity in protected areas. Areas that register a large number of cases of conflict between protected areas and the community, according to the results of a ranger-based monitoring system, have preferential access to funds, as do areas that are located close to the protected areas.

Source: Tusabe and Habyalimana 2010.

Sustainability of projects (gauged through the economical, social, and environmental indicators stated in the proposal and their likelihood of being achieved) and the proportion of community contribution are also considered.

Once projects are selected, contracts are signed with the district authority and the community. Contracts cover lengths of time that depend on the project complexity and can vary from 1 month to 15 months. The community is often grouped into cooperatives or direct-specific target groups when their ownership and level of organization guarantee effective implementation of the project.

Figure 14.3 Funds Disbursed to Community Projects around the VNP, by Sector, 2005–08



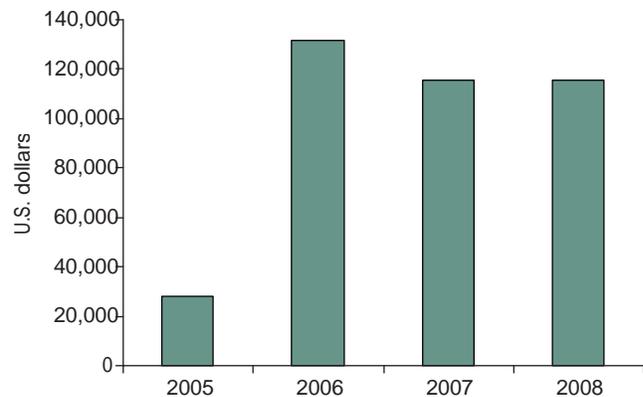
Source: Téléspire 2009.

funds because of the high priority education is given within the sectors in the Musanze district, near the VNP. The annual amount disbursed is directly correlated to tourism revenues collected in the previous year. The amount of funds disbursed to communities in each year between 2005 and 2008 is shown in figure 14.4.

By 2008 seven districts bordering parks in Rwanda with a population of almost 300,000 people had been reached by the community project financing scheme (Bush 2009). Although no formal study has yet been carried out to assess the impact of the scheme on the livelihoods of people living near the VNP, the RDB and local authorities indicate that the scheme has contributed to an increased awareness of tourism benefits to the community and to the need to protect biodiversity in the VNP (Spenceley et al. 2010).

One specific project that has benefited from community fund financing is the high-end Sabyinyo Silverback Lodge. The eight-room lodge located at the periphery of the VNP is a joint venture of the local Kinigi and Nyange communities (represented by the Sabyinyo Community Livelihoods Association, or SACOLA); the private sector (Governors Camps Ltd); international NGOs, in particular, the International Gorilla Conservation Program (IGCP) and the African Wildlife Foundation (AWF); and the RDB. Planning for the lodge began in 2004, and the first tourists began to arrive in August 2007 (Makambo 2009). Some initial funding was obtained from the U.S. Agency for International Development (Verdugo 2009). The joint venture agreement includes a 15-year lease agreement between Governors Camps Ltd and SACOLA. The private sector operator built

Figure 14.4 Funds Disbursed to Community Projects around the VNP, 2005–08



Source: Téléspire 2009.

and operates the lodge, and pays the communities a \$50 occupied bed night fee and also 7.5 percent of net sales (Makambo 2009).

This joint venture operation allows people who live close to the VNP to benefit from tourism in four main ways: equity in a tourism business, employment opportunities at the lodge, the supply of goods and services, and dividends from profits. The lodge employs 45 local people, who receive training and experience in hospitality and tourism. Local agricultural produce is purchased for use by the lodge, and there are plans to establish traditional dancing, a cultural center, a community walk, and handicraft sales at the lodge. In addition, there are plans under the

joint venture to use funds from the lodge to finance infrastructure, such as roads, in the area (Makambo 2009). Weaknesses of the joint venture, however, include poor leadership and weak governance of SACOLA and the reliance on the private sector operator to generate revenue from tourists (Makambo 2009).

Social benefits from gorilla tourism. Since the tourism revenue-sharing scheme was initiated in 2005, a number of direct and indirect projects with social benefits of gorilla tourism for local communities living near the VNP have been implemented (Uwingeli 2009):

- **Schools:** Ten schools have been constructed, with 56 classrooms and an average of 65 pupils per classroom per rotation (morning and afternoon). The school construction has reduced the distance traveled by children to the nearest schools, allowing them to spend more time on their studies after school.
- **Water tanks:** Thirty-two water tanks have been constructed. These provide 20 liters of water per person per day, and at least 1,250 people are served by each tank.
- **Income-generating activities:** Ten community associations have been supported directly through the revenue-sharing scheme, and a number of other projects, such as bee-keeping and basket weaving, have been implemented. In all of these projects, the focus has been on training for income-generating activities.
- **New partnerships in conservation and community development** brought to the construction of the Sabyinyo community lodge, which is owned by SACOLA, but managed by a specialized ecolodge company. At least 3,000 households are members of SACOLA and benefit from the agreement with the managing company to pay SACOLA bed night fees and a percentage of monthly net income.

Employment from gorilla tourism. The VNP employs at least 180 people, who work as guides, gorilla group trackers (for both tourism and research groups), and antipoaching teams deployed in the five protected sectors of the VNP (Uwingeli 2009). In addition, an estimated 800 community members around the VNP are involved in day-to-day management activities and benefit from opportunistic and temporary employment and the revenue-sharing scheme. VNP management has helped to form two umbrella associations: one for conservation activities in the VNP (*Amizero*, or hope) and another for community development activities (*Iby'Iwacu*). Several hundred volunteers work with the two

organizations as crop rangers, conservationists, porters, and community awareness representatives.

The *Iby'Iwacu* cultural village has been developed in collaboration between a private sector tour operator, Rwanda Ecotours, and a group of former poachers living near the VNP. As a result of an academic research project, a participatory process began in 2005 to transform the livelihoods of poachers toward farming, and then tourism. Part of the concept was to benefit conservation, by providing alternative livelihood opportunities to illegal hunting of buffalo and other wildlife in the VNP. Meetings with poachers were held to gain their trust and insights, and study tours were undertaken to raise understanding of cultural tourism products elsewhere.

Interviews were undertaken with tourists to establish what they would be willing to pay for a cultural experience. Community members engaged in the design, construction, and operation of the cultural village. Local architectural techniques were used in the construction along with local materials such as thatching grass and wood. Tourists can stop at the *Iby'Iwacu* and experience local attire, practice traditional fire-making techniques, archery, drumming, and dancing; visit a traditional healer; and prepare and eat traditional food. The village generates around \$14,000 per year, and community representatives identify projects in the community that they can finance (Sabuhoro 2009).

Challenges. Studies show that tourists to Rwanda do not have a particular willingness to pay for community benefits. Bush, Hanley, and Colombo (2008), for example, find that the percentage of VNP revenues used to enhance local community development does not have a significant effect on tourism demand. Bush, Hanley, and Colombo also note that these findings do not imply that tourists are unwilling to take part in community-based tourism—rather, that they are not willing to sacrifice other immediate benefits of the trekking experience relative to increases in permit prices that were dedicated to revenue sharing. This represents an important departure from common ecotourism principles about social benefits. Bush (2009) suggests that tourists need to be better educated about the human dimension of conservation to emphasize the conceptual link between the needs of the local populations and biodiversity conservation.

Furthermore, Rutagarama and Martin (2006) state that there is something of a catch-22 in relation to community conservation in Rwanda. On one hand, the empowerment of local partners will be constrained when appropriate powers are not devolved to them. On the other hand, it is

impossible to impose powers on those who feel neither capable nor inclined to exercise them. Rutagarama and Martin (2006) therefore suggest the need for a flexible framework that enables capacity and power to coevolve in locally appropriate ways. Developing the assets that partners need to maximize their opportunities for entering productive partnerships should be a fundamental part of plans to widen (and deepen) local participation in tourism. In some countries this has been done through a hybrid approach, and by retrofitting community-based tourism enterprises into joint-venture partnerships with private sector operators. Although the transaction costs, such as the time needed to negotiate deals, can be high, these partnerships can provide a win-win for the private sector and community members with appropriate agreements (examples are Damaraland in Namibia, Rocktail Bay and Phinda Reserve in South Africa, and Covane Fishing and Safari Lodge in Mozambique). In these situations the capacity of community members is built over time through partnerships with businesses that understand the tourism sector, how to operate a business, and how to establish market linkages.

Implications for conservation

Mountain gorilla tourism in Rwanda has long been viewed as a valuable conservation tool. An economic incentive to conserve the mountain gorilla is provided by international tourists paying relatively large sums of money to spend a short amount of time with the gorillas. Since its conception, organized gorilla tourism has provided funds to VNP authorities to assist with conservation activities. Nature-based tourism has thus been enthusiastically accepted and supported by governments, conservationists, and tourists alike and, in Rwanda, has been acknowledged as playing a crucial role in the success of mountain gorilla conservation in the VNP (Bush, Hanley, and Colombo 2008).

The number of mountain gorillas left in the world is estimated to be approximately 700. As of 2003, 380 gorillas lived in the Virunga volcanoes range, while 320 lived in Bwindi Impenetrable National Park in Uganda as of 2006 (Uwingeli 2009). Research indicates that the gorilla populations in areas frequented by tourists are increasing, with an overall growth in the population of 1.1 percent between 1989 and 2003 (Fawcett 2009) (box 14.3). Gorilla groups in the Democratic Republic of Congo are doing less well in terms of population growth, which may be due to the lower presence of patrols, researchers, and tourist visits there compared with Rwanda and Uganda (Fawcett 2009).

Box 14.3 Growth in Gorilla Conservation Efforts

Mountain gorillas in the Virunga region of Rwanda, Uganda, and the Democratic Republic of Congo were censused five times between 1970 and 1989, when the population was estimated at 324 gorillas. War and political unrest in the region since 1990 meant that no census was conducted over the next decade, and in 2000, the observation of 32 groups provided an estimate of between 359 and 395 gorillas. This represents a 0.9 percent to 1.8 percent annual growth rate over 10 years and a 1.0 percent to 1.3 percent annual growth rate between 1972 and 2000.

Source: Kalpers et al. 2003.

Biological research on mountain gorillas by teams of researchers in the Karisoke Research Centre in Rwanda provides important information on trends in sound tourism management. Of the estimated 380 gorillas in the Virunga Volcanoes Range, at least 260 are habituated and regularly monitored in Rwanda (Uwingeli 2009): These gorillas are checked on a daily basis; health reports are shared, and actions taken when necessary. The habitat is patrolled daily to detect illegal activities and discourage attempts to set snares. The use of information technology allows the habitat of the mountain gorillas to be mapped—in particular, to show where gorilla groups are moving and what illegal activities are occurring and to plan ranger patrol activities accordingly.

Over the years, the Rwandan government has become more supportive of gorilla conservation, including allocating more land around the VNP for cultivation to reduce pressure on the park for agriculture and natural resource use (Uwingeli 2009). A consultation exercise is currently under way to assess the feasibility of a VNP expansion program (Bush 2009). Although the number of snares found in the VNP have increased over time (Fawcett 2009), some former poachers have begun working on conservation efforts, and there is even an “ex-poachers association” consisting of about 400 local community members, who patrol with ORTPN staff and also help with local education, collecting information, and addressing human-wildlife conflict (for example, crop raiding) (Uwingeli 2009).

Although no systematic method currently exists for registering or training guides in Rwanda, VNP staff have benefited from capacity-building programs by the RDB (and previously, by ORTPN) and their partners in guiding, gorilla

health monitoring, and general biodiversity conservation. Also, with the support of IGCP and the Karisoke Research Centre, additional training has been provided for gorilla trekking guides on how to work with visitors and how to minimize adverse impacts on the gorillas (Kalpers et al. 2003; Fawcett 2009).

Revenues from Rwanda's national parks are primarily used to fund conservation efforts in the parks and worldwide tourism marketing activities. Salaries for all of the staff are paid out of national park fees. VNP park management is cofunded through the research activities of the Karisoke Research Centre, which provides basic park management functions such as monitoring and antipoaching patrols for gorillas. Further conservation funds are contributed by NGOs such as the IGCP and CARE. These additional funds and support have contributed enormously to gorilla conservation successes in Rwanda (Bush 2009).

Willingness to pay for conservation

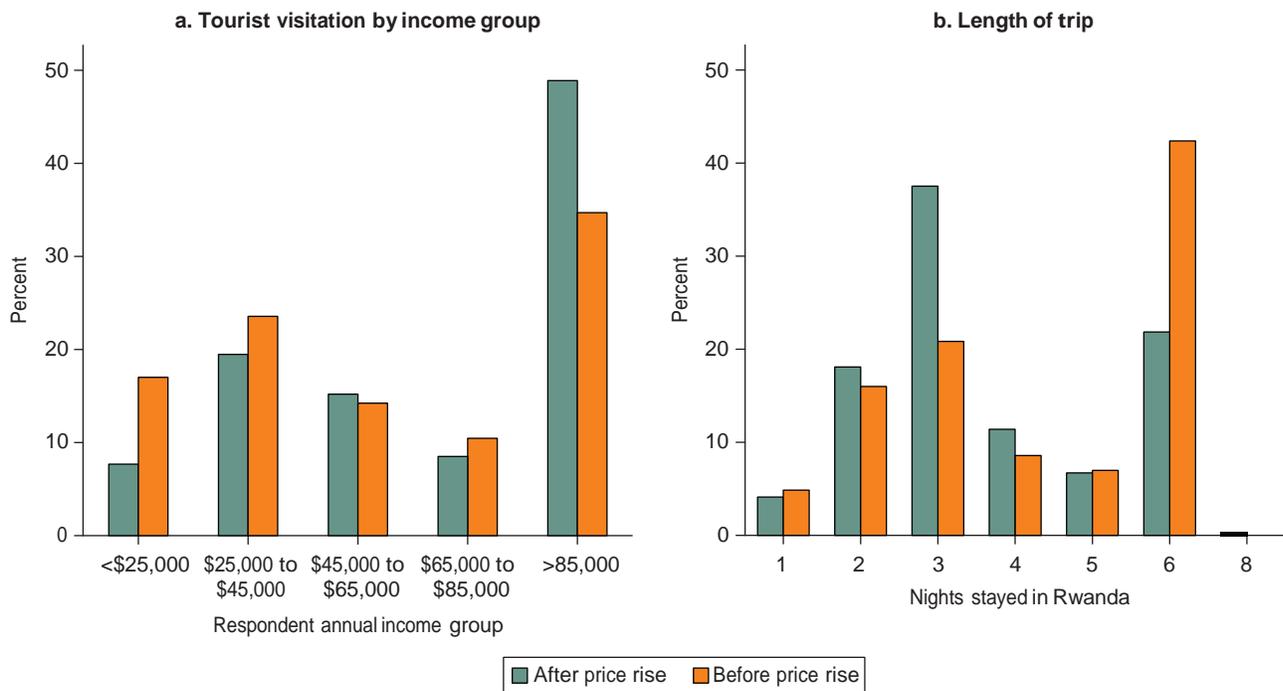
Research by Bush, Hanley, and Colombo (2008) finds that gorilla trekking tourists are willing to pay for biodiversity conservation, for both gorillas and other wildlife. The authors also find that tourists prefer to be in small

groups³ and prefer the length of their trek to be between one and three hours. These two findings could be interpreted as showing that tourists support the ecotourism principle of minimizing ecological impact, since more people taking longer trips would increase adverse ecological impacts.

However, price increases in gorilla permits appear to affect tourism visitation, at least in the short term. Research by Bush and Fawcett (2007) reveals that the price increase in June 2007 from \$375 to \$475 had a marked impact on the demographics of visitors to the mountain gorillas (figure 14.5). In particular, the percentage of visits by people in the highest income group increased significantly, while visits by all but one of the other income groups decreased. The length of the stay also decreased significantly, from a mean number of 4.2 nights to 3.6 nights.

The proportion of visitors going to the other national parks in Rwanda was also significantly lower after the price increase, as was the proportion of visitors to the genocide memorial and taking the Kigali city tour. The proportion of visitors participating in alternative activities within the VNP increased, however: hikes on the Karisimbi and Bisoke volcanoes, viewing golden monkeys, visits to Dian Fossey's tomb, and nature walks.

Figure 14.5 Impact of the 2007 Gorilla Permit Price Increase on Visitation



Source: Bush and Fawcett 2007.

The reduction in visitors' length of stay and in the frequency of other activities caused by the price increase in gorilla tourism has implications for the overall economic impact of international tourism in Rwanda. However, Bush (2009) notes that it is probably time to repeat the study and establish whether the changes in demographics and consumption were temporary or lasting. This study would also provide guidance for decision making about further price changes. A study of tourism satisfaction and pricing for alternative products to ensure value for money is also needed in order to increase the number of bed nights and overall trip spending (Bush 2009).

Remaining constraints and lessons learned

There are a number of constraints to the further development of gorilla tourism in Rwanda:

- Gorilla tourism can present a threat to gorilla conservation, affecting, for example, the health and behavior of gorillas (box 14.4), and needs to be well managed.
- Although the number of tourist accommodation facilities is growing, the facilities are not sufficient at key tourism sites, including the VNP. Additionally, the quality of accommodations is not standardized, and prices are high relative to accommodations of equivalent quality in other East African countries.
- The quality of customer service is inconsistent and generally poor compared with that in neighboring countries. Also the focus on high-end consumers implies demand for higher quality. Bush found that after the increase of the permit price respondents registered significantly lower levels of satisfaction with their trekking experience (Bush 2009).
- Public and private sector collaboration is improving through the Joint Action Development Forum and Steering Committees, though it is still weak.
- Although the road distance between Kigali and Musanze is short, the quality of the road could be improved.
- While regional collaboration is of interest to government authorities of the Democratic Republic of Congo, Rwanda, and Uganda, regional instability has made it difficult to harmonize tourism and conservation in

Box 14.4 Threats to Gorilla Conservation from Tourism

All six great apes—gorillas *Gorilla gorilla* and *Gorilla beringei*, chimpanzees *Pan troglodytes* and *Pan paniscus*, and orangutans *Pongo pygmaeus* and *Pongo abelii*—are categorized as endangered on the International Union for Conservation of Nature's 2000 Red List. Threats to these species include loss of habitat to settlement, logging, and agriculture; illegal hunting for bushmeat and traditional medicine; the live ape trade; civil unrest; and infectious diseases. The great apes are highly susceptible to many human diseases, some of which can be fatal. If protective measures are not improved, ape populations that are frequently in close contact with people will eventually be affected by the inadvertent transmission of human diseases. Regulations that protect habituated apes from the transmission of disease from people are often poorly enforced. Enforcement of existing regulations governing ape-based tourism, and the risk of disease transmission between humans and the great apes minimized (Woodford, Mutynsky, and Karesh 2002).

Tourism might also be changing gorilla behavior in negative ways. In one research study, Fawcett, Hodgkinson, and Mehlman (2004) assessed more than 10 months

of behavioral data collected from three gorilla groups during one-hour observation sessions before, during, and following tourist visits. Results from these data show clearly that the current tourism program is having a significant impact on gorilla behavior. All three gorilla groups were found to spend significantly less time feeding and more time moving during tourist visits. In addition, the frequency of certain aggressive behaviors, many directed at humans, increased in all three groups during tourist visits, and the gorillas increased their proximity to the silverback members (adult male gorillas usually more than 12 years of age).

Some gorilla behaviors observed during the study were correlated with the distance maintained between the gorillas and the tourists and the number of tourists in the gorilla group. Reducing this impact on gorilla behavior may be a simple matter of better training guides to maintain the 7-meter distance rule between tourists and gorillas. Many of these changes in gorilla behavior during tourist visits are believed to indicate higher levels of stress in gorillas (Fawcett, Hodgkinson, and Mehlman 2004).

accordance with the Virunga Massif Transboundary Plan (Uwingeli 2009; Mehta and Katee 2005).

- There is widespread poverty around the VNP and increasing pressure for more agricultural land by a growing rural population.
- Benefits accruing from the VNP should be in relation to the needs of people living close to the park. Local people desire individual benefits (such as money), and not only collective infrastructure that is used by the whole population, such as water tanks or clinics (Uwingeli 2009).

Several tourism-related lessons learned at the VNP have the potential to improve other protected areas in Rwanda:

- Because of the limited number of available gorilla permits, product diversification and promotion is required to encourage visitors (particularly repeat visitors) to stay longer, spend more money, and visit other destinations in the country.
- Gorilla conservation needs to be balanced with research visits and tourism trips to ensure that the health of the gorillas and the integrity of their habitat are maintained.
- Conservation efforts focused on the key species is important, but the contribution to the habitat/ecosystem conservation must also be ensured. Long-term dedication and partnerships in conservation (research, protection, and tourism) are essential.
- Sustainability of gorilla tourism can be achieved only if regional collaboration is established to conserve transboundary protected areas and cross-border resources.
- Standardized and high-quality training for guides is needed, for those working both within and outside protected areas.
- A more diverse range of accommodation and restaurant facilities is required, with higher quality and better value for money.

TOURISM IN RWANDA: THE BIGGER PICTURE

Besides the mountain gorillas in the VNP, Rwanda has other excellent tourism assets that create a wider foundation for the tourism sector. Rwanda has three national parks that cover about 10 percent of the country's area, one of which is the VNP. The Akagera National Park offers a range of wildlife including elephants, hippopotamuses, giraffes, and zebras. The Nyungwe Forest National Park has a large tract of mountain forest and is rich in biodiversity. Guided walks and chimpanzee tracking is offered. Lake Kivu has recreational facilities as well, but there is still potential for significant

tourism development. Rwanda also offers business opportunities, mainly for travelers from the eastern part of the Democratic Republic of Congo and other neighboring countries. Rwanda has also been successful in attracting national, regional, and international conferences.

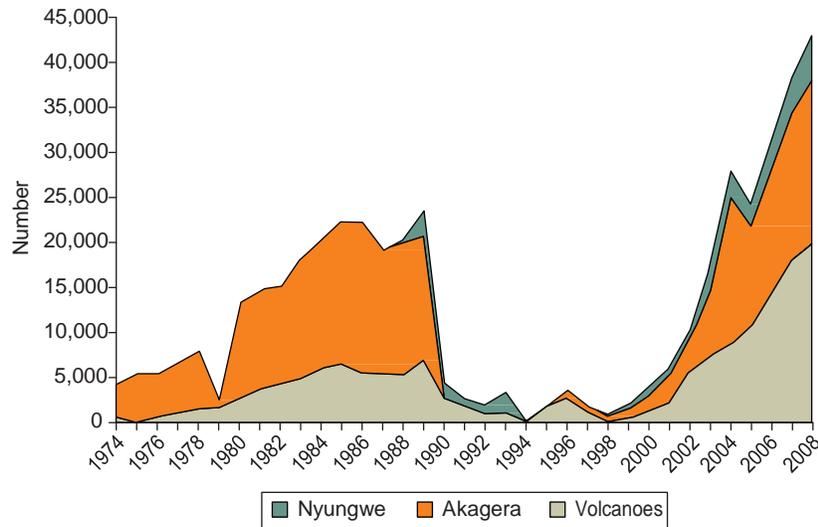
Development and structure of the tourism sector

In the 1970s and early 1980s only a small number of international tourists visited Rwanda. Most tourists visited Akagera National Park, a government-owned, high-end destination used mostly for hunting. Only a very limited number of tourists visited the gorillas. Tourism was not a national priority and was not viewed as a tool to reduce poverty. The first hotel, the Mille Collines, was built in 1973 and the ORTPN was created in 1974. No tour operators existed in the 1970s and 1980s, and the sector was dominated by the government, which owned all hotels except the Mille Collines.

Tourist arrivals started to increase notably in the 1980s (figure 14.6). Most tourists still visited only Akagera National Park at that point, but the first official mountain gorilla tourism program was launched in 1979, leading to continuously increasing visitor numbers in the VNP, peaking at 6,900 in 1989 (ORTPN 2008b). This trend was brought to an abrupt end with the outbreak of the war in mid-1990s, however. Visits to the VNP, which provided most of the tourism revenue by the mid-1990s, dropped in 1994 due to the genocide and again between 1997 and 1999, when the VNP had to be closed for some time due to an insurgency. Visits increased in the years following, however. In 2008 about 17,000 people visited the VNP to see the gorillas, a dramatic increase from the late 1980s and an impressive recovery from only 417 tourists in 1999 after the reopening of the VNP following the war. Total visits to all Rwanda's national parks reached more than 43,000 visitors in 2008. Today, the majority of visitors to the VNP are foreigners, while Akagera National Park is visited by a more equal mix of Rwandan and foreign residents.

Reliable tourist arrival statistics for Rwanda as a whole are available only for 2007 onward, when entry cards were introduced. This innovation led to a substantive upward revision of tourism revenue. The use of statistics on park visits alone led to a significant underestimation of the total number of tourists. Most important, the large number of business and conference tourists had not been taken into account. Although data are still not collected electronically and the quality of data is not high, there is little doubt that the recovery of the tourism sector in Rwanda has been successful.

Figure 14.6 Visits to Rwanda's National Parks, 1974–2008



Source: ORTPN.

Table 14.1 Tourist Arrivals to Rwanda by Purpose of Visit, 2007–09
Thousands

| Year | Holiday/vacation | | Visiting friends and relatives | | Conference/business | | Transit | | Other | | Total |
|------------------|------------------|-----------|--------------------------------|-----------|---------------------|-----------|---------|-----------|--------|-----------|-------|
| | Number | Share (%) | Number | Share (%) | Number | Share (%) | Number | Share (%) | Number | Share (%) | |
| 2007 | 21.5 | 2.6 | 332.0 | 40.2 | 275.8 | 33.4 | 150.1 | 18.2 | 47.0 | 5.7 | 826.4 |
| 2008 | 59.4 | 6.1 | 248.3 | 25.3 | 345.9 | 35.3 | 307.8 | 31.4 | 19.1 | 1.9 | 980.6 |
| 2009 (Jan - Jun) | 21.4 | 4.9 | 112.2 | 25.6 | 187.9 | 42.8 | 83.3 | 19.0 | 34.1 | 7.8 | 439.0 |

Source: ORTPN.

A total of 980,577 international arrivals were recorded in 2008, up from 826,374 in 2007 (table 14.1). The main characteristics of international tourists entering Rwanda are:

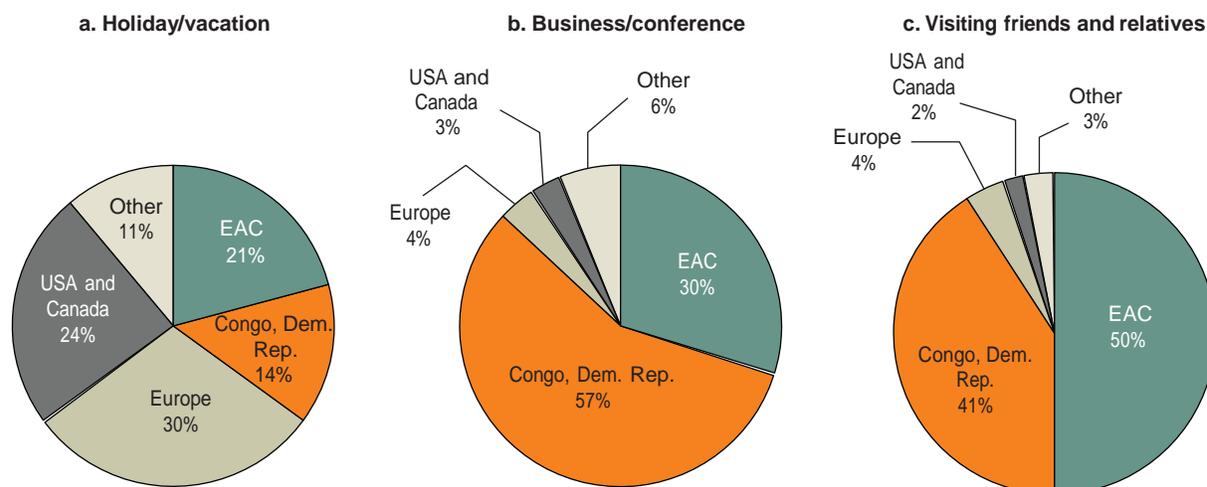
- Most visitors came for business and conferences (35 percent in 2008). This had already been indicated in a hotel market study, which found that 75 percent of all tourists in the country in 2006 were business travelers (IFC 2007).
- The share of tourists arriving in Rwanda for vacation is relatively small, but increased from 3 percent in 2007 to 6 percent in 2008.
- The large number of international arrivals includes transit passengers, thereby reducing the overall number of arrivals that can be counted as tourists entering Rwanda.

The tourist entry cards offer more details about travelers entering Rwanda. Overall, 88 percent of total international

arrivals came from Africa. The country or region of origin, however, varies considerably by the purpose of the visit. Most of the tourists on vacation came from Europe and the United States (figure 14.7a). The majority of business and conference travelers came from the Democratic Republic of Congo and the other EAC member states (figure 14.7b). Most international tourists visiting friends and relatives in 2008 came from the EAC and Congo Republic (figure 14.7c). According to estimates by ORTPN and the Ministry of Economy and Finance, non-African tourists coming to Rwanda for leisure or conference and business purposes spent the most money among the various categories of tourists (table 14.2).

Most leisure tourists visit the region as part of a multi-country itinerary and do not yet consider Rwanda as a stand-alone destination. A recent survey of tourists, tour operators, and accommodation providers in Rwanda (SNV and RDB 2009) finds that the most common length of stay for

Figure 14.7 Country/Region of Origin of Foreign Arrivals to Rwanda, by Purpose of Visit, 2008



Source: ORTPN.

Table 14.2 Average Spending by Tourists in Rwanda, by Purpose of Visit, 2009

| Purpose of visit | Average amount spent per visit (US\$) | |
|--------------------------------|---------------------------------------|------------------|
| | Non-African visitors | African visitors |
| Leisure | 1,623 | 1,136 |
| Conference and business | 1,623 | 108 |
| Visiting friends and relatives | 120 | 84 |
| Transit/other | 119 | 83 |

Source: RDB/ORTPN/MINECOFIN, based on visitor expenditure survey from 2006, adjusted for inflation.

Table 14.3 Growth in Hotel Rooms, Restaurants, Tour Operators, and Travel Agencies in Rwanda

| Service | 2003 | 2009 | Average annual growth rate (%) |
|-------------------------|-----------------|-------|--------------------------------|
| Hotel rooms | 650 | 4,256 | 37 |
| Restaurants | 50 ^a | 94 | 17 |
| Tour operator companies | 12 | 26 | 14 |
| Travel agencies | 5 | 24 | 30 |

Source: RDB/ORTPN.

a. Data from 2005.

domestic tourists was two days, while the most frequently cited length of stay by international tourists was four days.

The number of hotel rooms and tour operators in Rwanda has increased significantly in recent years, underscoring the successful recovery of the tourism sector. Data available from RDB and ORPTN show that the number of hotel rooms increased from 650 in 2003 to 4,256 in 2009, more than 500 percent overall and 37 percent annually on average (table 14.3). Information on occupancy rates, however, is very limited. The only available information spans January to March 2008 and indicates an average room occupancy rate of 36 percent. There was a large difference in the occupancy rates by the grade of accommodation. Room occupancy rates for upper-grade accommodation (a total of 453 rooms) were more than 70 percent on average, whereas

rates for lower-grade accommodation (2,264 rooms) were only 28.5 percent (ORTPN 2008c, 2008d).

A total of 26 tour operators were active in Rwanda as of 2009, compared to none in the 1980s. The number of restaurants and travel agencies has grown as well. Most Rwandan tour operators started out with little available finance, which limited their possibilities. They could, for example, not afford to buy a car, but had instead to rent cars as they needed them. Most of those tour operators have successfully expanded their businesses by now, though, and some regional operators have also opened offices in Kigali.

The tourism sector has also experienced a significant amount of privatization. The situation is much different from the 1980s, when all hotels except one were government owned. Although the government still held a share in two hotels in 2010, it was not involved in their management, leaving the tourism sector almost entirely in the hands of

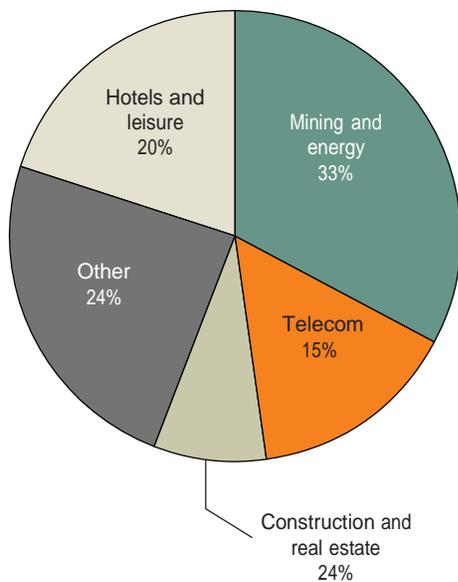
the private sector. The government still owns and runs the national parks, although in 2009 a concession was awarded to the private company African Parks to manage Akagera National Park.

Tourism income, as recorded by ORPTN, has increased in recent years. The majority of revenue is derived from VNP entrance and gorilla permit fees. Other income is raised through the gorilla naming ceremony, partners and donors, and interest from treasury bills and other income. Most of the revenue is spent on operating expenditures, whereas capital expenditures paid out of the budget of ORPTN are limited. Large investments are funded by the overall central government budget. Revenue shared with communities has increased since 2005, representing 8 percent of total operating expenditure in 2008, up from 6 percent in 2006.

Foreign investment in Rwanda's tourism sector is substantial. Between 2000 and 2009, foreign direct investment of RF 258 billion went into hotels and leisure, accounting for 20 percent of total FDI inflows into the country (figure 14.8). Local investment in hotels, restaurants, and other tourism activities amounted to RF 140 billion between 1999 and 2009, representing 16 percent of total local investment over that period.

Although the amount of foreign investment exceeded the amount of local investment, it has been concentrated on a small number of projects. Local investors play an important

Figure 14.8 FDI to Rwanda, by Sector, 2000–2009



Source: RDB; included are RDB registered investments.

role in the development of the tourism sector in Rwanda. Eighty-six percent of all new projects since 1999 that are operational were financed by local investors. Moreover, a group of private investors has established the Rwanda Investment Group (RIG) to pool resources. Several sub-RIGs have also been created, one of which is currently planning the construction of a convention center intended to hold up to 2,000 participants, which would increase Rwanda's chance of attracting large conferences.⁴

Finally, the structure and organization of the tourism sector has been reformed to assign clear responsibilities. The Ministry of Commerce, Industry, Investment Promotion, Tourism, and Cooperatives (MINICOM) holds overall responsibility for tourism. The private sector is represented by the tourism chamber, which consists of four industry associations: accommodation, tour operators, transport, and private education establishments. The tourism chamber is, however, still supported by the government because of insufficient resources. It is part of the private sector federation, the equivalent of a chamber of commerce and industry.

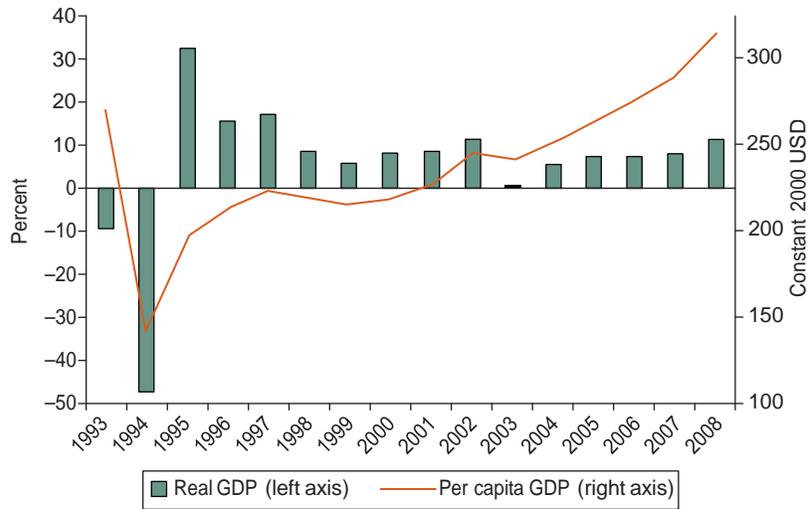
Contribution of tourism to the economy

Rwanda has made remarkable progress in terms of economic growth since the genocide in 1994 (figure 14.9). Growth averaged 15.6 percent in the five years after the genocide in 1994, declined to an average of 6.6 percent between 2000 and 2004, and increased again to an average of 8.4 percent between 2005 and 2008. A significant increase in GDP per capita has been recorded along the way, from \$142 in 1994 to \$313 in 2008 (both in 2000 prices).

While the contribution of tourism to GDP remains small, the sector has become Rwanda's main source of export revenue. The category "restaurants and hotels" has contributed less than 2 percent to overall GDP and 4 percent to the services sector on average since 1999, but value added from restaurants and hotels (at constant prices) has recorded a steady increase of 21 percent on average.⁵ The main increase in the services sector came from wholesale and retail trade and other services (education, health, finance and insurance, and real estate). The measurement of tourism's contribution to GDP, however, is difficult, because transport services, for example, constitute a large share of tourism revenues but are not included in the "hotel and restaurants" category.

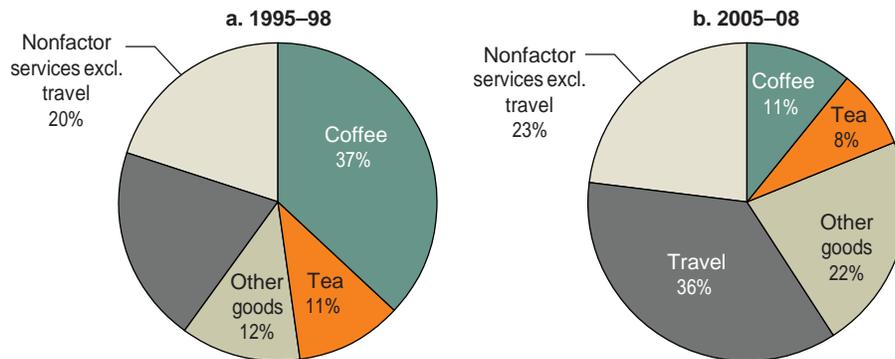
Overall, exports of nonfactor services from Rwanda have outperformed exports of goods (such as coffee and tea) as Rwanda's main foreign exchange earner (figure 14.10). Travel is the largest component of exports of nonfactor

Figure 14.9 Growth in Real GDP and GDP per Capita, 1993–2008



Source: International Monetary Fund.

Figure 14.10 Comparison of Composition of Export of Goods and Nonfactor Services (Averages)



Source: IMF.

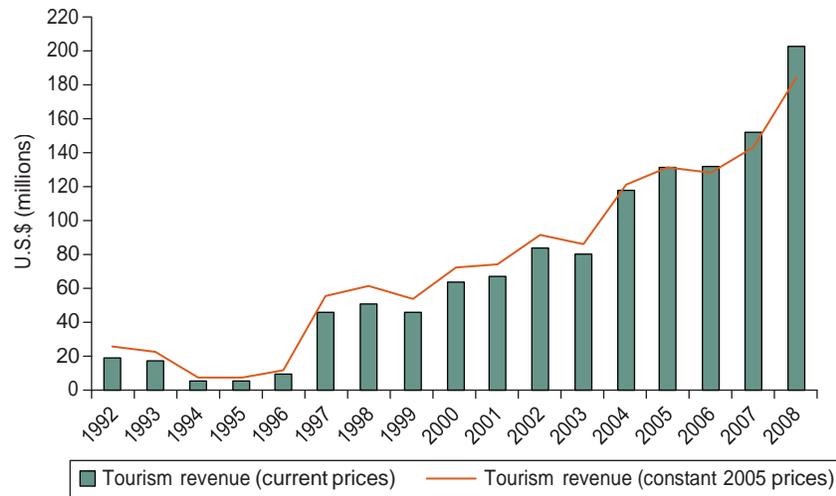
services; other categories include other transportation and freight and insurance. After a decline from \$19 million in 1993 to only \$6 million in 1995, revenue from tourism increased tremendously to \$202 million in 2008 (figure 14.11). A comparison with the preconflict period is difficult, because data on tourism revenue are available only for 1992 onward.

Rwanda has identified tourism in its Economic Development and Poverty Reduction Strategy as a national priority sector to eradicate poverty (Republic of Rwanda 2007). According to rough estimates, each of the three big business hotels in Kigali⁶ generates about \$500,000 per year in income for semiskilled and unskilled workers, food pro-

ducers, and artisans. Tourists visiting the VNP and the Musanze area generate around \$1 million in income for poor workers and producers. In addition, the area receives large amounts of donations and grants⁷ (SNV and ODI 2008). As much as possible, hotels source their supplies (particularly food products) from the local market to contribute to the economy.

Estimates for 2009 indicate that the tourism industry directly employs 33,800 people in Rwanda, whereas indirect employment accounts for another 40,500 jobs, resulting in total travel and tourism-related employment of 74,300 jobs. Tourism thus represents 4.0 percent of total employment in Rwanda, only slightly below the Sub-Saharan African

Figure 14.11 Tourism Revenue, 1992–2008



Source: IMF and World Bank, World Development Indicators database.

average of 4.6 percent, and well below the amount in Kenya (7.1 percent), Tanzania (7.1 percent), and Uganda (6.6 percent). Employment in the tourism industry (direct and indirect) has grown by 2.8 percent on average in Rwanda over the past 10 years, compared with 3.4 percent in Kenya, 2.5 percent in Tanzania, and 2.4 percent in Uganda (World Travel and Tourism Council 2009).

REMAINING CONSTRAINTS AND EMERGING POSSIBILITIES FOR TOURISM

Despite the good performance of the tourism sector in Rwanda, several challenges remain. The main impediment cited by almost all actors in the sector is the large skill deficit. This deficit applies to all areas of tourism, including guides, chefs, and hotel service personnel and technicians. Hotels and tour operators either train their staff in house or send them to neighboring countries to be trained, although recently some tourism schools have been opened by the private sector. The emphasis of the curriculum is on managerial rather than technical skills, meaning that the demands of the sector are not taken into account adequately. To accomplish the goal of turning Rwanda into a service-oriented economy, skill development is of utmost importance.

Several other challenges confront the tourism sector:

- There is an overreliance on gorilla tourism. The number of permits cannot be easily increased, and the existing permits are typically sold out. Tourism needs to be

diversified and other attractions promoted, such as birding and primates in Nyungwe, visits to Lake Kivu, and conference tourism. Diversity is particularly important in establishing Rwanda as a stand-alone destination.

- Access to finance is still an impediment for the development of the sector. Banks seem reluctant to finance tourism projects because they are within a service-oriented sector rather than attached to a sector producing tangible goods. Stakeholders in the tourism sector have proposed the establishment of a guarantee fund by the government.
- Other sectors need to be further promoted through the tourism sector in order to reduce poverty. Pro-poor links that can be exploited further include the food supply chain to hotels, lodges, and restaurants; assistance to poor households to access training, employment, and promotion in hospitality; practical initiatives to help businesses enhance their own business models; and partnerships with more domestic and regional tour operators, hotels, and lodges to promote community activities such as cultural events and the sale of handicrafts (SNV and ODI 2008).
- Rwanda needs to comply with international standards. Currently, hotels are being classified according to the EAC standard. While this is an important step, it poses challenges to a number of hotels. Once Rwanda shifts to an international system of standards and classifies hotels accordingly, the pricing structure might have to be revised to remain competitive with the neighboring countries.

- RDB and MINICOM do not have sufficient staff. In MINICOM, only one part-time person is responsible for tourism. RDB, as well, has only a limited number of staff. Given the very ambitious agenda for the tourism agenda, sufficient staffing should be in place.
- Infrastructure needs improvement. Although roads in Rwanda are broadly adequate, the air transport connection to the country is still limited. A new airport is currently being planned, which could attract more international carriers to offer direct flights, especially from Europe.

In the face of the challenges, several possibilities are emerging to diversify the tourism sector and increase its contribution to the economy. Regarding leisure tourists, primate tours, and birding in the Nyungwe Forest are the most promising areas of diversification. New experiences would extend the length of stay of tourists and eventually establish Rwanda as a stand-alone destination. Lessons learned from gorilla tourism regarding conservation, however, should be taken into account when developing tourism attractions in other national parks. The development concept of Rwanda's Destination Management Areas is identified in the Sustainable Tourism Development Master Plan (Republic of Rwanda 2009b). Conference tourism could also be of great benefit to Rwanda. In this regard, the construction of a conference center that will accommodate up to 2,000 people is under way. Further, a draft action plan for the development of MICE (meetings, incentives, conferences, and exhibitions) tourism has been prepared by the Tourism Working Group.

NOTES

1. EAC member countries are Burundi, Kenya, Rwanda, Tanzania, and Uganda.
2. The gorillas are visited by independent travelers, overlanders, and high-end tours (ORTPN 2004).
3. The optimum group size, according to tourists, is six people; tourists are not willing to pay more to reduce group size beyond this (Fawcett 2009; Weber 1993).
4. The currently available conference facilities can host a maximum of 500 and 1,000 participants.
5. The share of hotels and restaurants is not available for years before 1999.
6. Serena Hotel Kigali, Hotel de Mille Collines, and Laico Umubano Kigali Hotel (former Novotel Kigali).
7. Including contributions to community development from ORTPN's revenue-sharing program and donations by tourists.

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