

To what extent can ecotourism projects help to promote the Rwanda as a high-end tourist destination on the German market?

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Abstract

Tourism in Rwanda is challenging. Since the country is small and hilly, it is difficult to tap the potential. As the country is blessed with diverse nature, the Rwandan government decided to combine ecotourism with high-end tourism, to exploit the full potential. This study aims to assess the extent to which these two types of tourism fit together, as well as if sustainability is a decisive argument in this upscale segment. In this context, ecotourism is characterized by its 3 core criteria: education, nature and sustainability.

To evaluate the main question: to what extent can ecotourism projects help to promote the perception of Rwanda as a high-end tourist destination on the German market? As well as if sustainability is a decisive argument, interviews with stakeholder from the Rwandan tourism industry as well as German tour operators were conducted, to gain an understanding of both sites and then evaluate them according to the 3 ecotourism core criteria and the demands of high-end tourists. The results showed that there is a difference in the perception of the needs of high-end tourists. While the 3 core criteria seem to be too relevant while they are in booking decision with the tour operator. The high-end lodges in Rwanda state an interest in these three criteria.

It is evident from the results that there is a limited active demand for sustainable tourist products, while nature and education are more relevant, but not yet fully exploited. However, all interviewees indicated that ecotourism, and in particular sustainability, is experiencing an increase in demand and will continue to grow in importance in the future. Accordingly, the results suggest the driving markets approach is relevant to further drive demand in that segment.

1 Introduction

Rwanda, does not have a long history in terms of travel, yet it appears on lots of travel bucket lists as a top destination (Elliott, 2020). Luxury lodges run by global brands such as Singita, One&Only and Wilderness Safaris can be found around Rwanda's national parks and offer unique and nature-near experiences, with overnight rates exceeding USD 15,000. These high-end lodges provide this expensive and lavish experience in conjunction with sustainability consciousness and philanthropic behavior. The objective of this study is to examine how ecotourism contributes to the high-end experience.

1.1 Problem Definition

Tourism in Rwanda is a challenge: The country is small and densely populated; this means capacities are limited. In order to become dependent on the tourism industry, the country must preserve the resources it has, so it can make use of them in the future. Conventional tourism or mass tourism concepts are therefore not suitable for the destination Rwanda, since these kinds of tourism often have negative impacts on the environment and local communities, as they are easily overburdened. Moreover, normal tourism often has the issue that local revenues do not stay local, and therefore, nothing remains except for the negative effects.

Paul Kagame, the current president of Rwanda wants Rwanda to become the Singapore of central Africa (Africa's Singapore?, n.d.). Although tourism was initially not a major part of Rwanda's strategy, the tourism industry has rapidly become one of the most important sources of foreign exchange income (Kabera, 2017, p. 20). The Rwandan government seems to understand the negative impact of conventional tourism, since they see the opportunity in the tourism industry to monetize and protect natural resources such as national parks, gorillas and other endangered animals. In the capital, the focus is on Meetings, Incentives, Conferences and Exhibitions (MICE) tourism, which is accountable for 42% of all tourist arrivals (RDB, 2021, p. 27). In the countryside, around the national parks, the country embarked on the way of high-end ecotourism, which can be subsumed below leisure traveling, which is just responsible for 7% of tourists' arrivals (RDB, 2021, p. 27).

When upscale tourists travel, they often spend a lot of money and want to demonstrate social status (Costa et al., 2019). High-end tourism is often related to abundance, waste and materialistic things and seems to contradict the ecotourism idea, which is connected with values like sustainability, nature and education (Beaumont, 2011, p. 138 et seq). It appears that these two ways of traveling are at odds with each other. In spite of this, lodges in Rwanda comprise both values. On the one side they position themselves as very luxurious.

1.2 Objectives and research questions

Due to the contrasts of ecotourism and high-end tourism, the author wants to elaborate how these two types of traveling fit together and to what extent ecotourism projects help to promote the perception of Rwanda as a high-end destination on the German market. In order to answer these questions, we must first determine whether Rwanda is considered a global high-end destination and if the country meets the necessary requirements for that upscale

segment. The goal is to compare the needs of the typical high-end tourist with the supply in Rwanda on-site and to focus on the German segment and aims to find possible areas for improvement to attract more high-end travelers from the German source market. Additionally, the importance of sustainability as a decisive factor for a booking decisions will be examined to understand the relevance of sustainability in that high-end segment.

In order to get an impression of the situation of tourism in Rwanda and, at the same time, to speak to locals and conduct interviews as well as visit the Singita Kwitonda Lodge.

1.3 Structure

This research is based on qualitative interviews with stakeholders in the tourism industry. To understand both sides better, the demand and supply, interviews were conducted with touristic players in Rwanda, like Singita, Wilderness Safaris and the Sabyinyo Community Livelihood Association (SACOLA) and Governors' Camp cooperative and tour operators from Germany. Furthermore the author compared the demand of German high-end tourists with the actual supply by the Rwandan destination to evaluate the thesis based on the interview results.

3 Methodology

As part of this study, the author conducted semi-structured interviews in order to collect qualitative data and answer the main question: To what extent can eco-tourism projects help to promote the perception of Rwanda as a high-end tourist destination on the German market? as well as the sub question: Is the sustainability factor a decisive argument for a booring decision?

Several stakeholders from both sides were interviewed better to understand the supply in Rwanda on site as well as the demand on the German market. Rwanda's stakeholders were represented by a group of tourism providers from the high-end ecotourism segment, such as Singita, Bisate Lodge, and Governors Camp. They are the ones who maintain close contact with their customers, interact with them on a personal level, and determine their offers. As part of an effort to understand the government perspective, the RDB was interviewed, since they are the ones supporting the tourism industry and creating good conditions for tourists and investors. The interviews were conducted in October and November 2021. A few of them were done in person in Rwanda, others in writing or in calls via Microsoft Teams. The interviews consist of 9 main questions to understand the following topics.

To understand the German target group better, both sides had to define the German high-end ecotourist. To evaluate the environmental motivation and commitment of travelers, the second question aimed to conceive the role of sustainability within the booking decision for tourists as well for hotels. The third topic was to compare the emitted and perceived image of Rwanda. Another one aimed to understand the high travel expenses and compare Rwanda with their competitor Uganda in the north, which offers similar touristic products but is much cheaper. Next to the demand for tourism in Rwanda, which was discussed with all interviewees, the future development of their project and Rwanda as a high-end ecotourism destination was a topic, too. As well as the tourism strategy in general and how the hotels fit into it. To better understand the role of the government in the tourism strategy, the work of the RDB was thematized.

Due to the inductive approach, the author divided the coding into the following categories after the interviews based on the simplified transcripts.

4 Results

4.1 The Tourists' Perspective

4.1.1 The Typical High-End Tourists

All three interviewees had difficulties defining that specific target group, as they all experienced that even within the high-end segment, the guests have individual preferences. For example, some guests prefer staying in camps, others like to explore cities and nightlife, to ascertain where and how locals are living, while others prefer to enjoy the nature (Appendix 6, p. X). High-end tourism is related to luxury, but there exists a wide range of understandings, because every individual has his/her own definition and requirements to call something luxury. (Appendix 5, p. X). Privacy and exclusivity, as well as unique or authentic experiences were described by almost all interviewees as something high-end tourists sought after. All three tour operators mentioned that a tourist who travels to Rwanda is mainly experienced in traveling to other countries in Africa or at least wildlife traveling and knows what animal experiences are about and wants to bring it to another level. Brunecker has described the high-end tourist in more detail like this:

So, the typical client is a couple, let's say starting 40, up to any age, well educated, well-travelled. In most cases, it's very few clients going directly, without any previous travel or knowledge to Africa. And from that point on it's totally individual. (Appendix 6, p. X)

The last sentence of the quote underlines the statement about the individual understanding of luxury.

Infrastructure is another important component for that kind of traveler (Appendix 7, p. X). Especially in Africa where proper streets are rare, guests of that segment are used to flying and tour operators generally recommend that rather than taking the bus or car. Many distances can be covered by air, whether by public plane or private helicopter, to avoid long distances on bad roads and maintain high standards (Appendix 6, p. X; Appendix 5, p. X). This is consistent with Hartmann's description of Africa tourists, whom she sees as sophisticated especially since they are a bit spoiled in terms of good infrastructure and high-quality lodges and she experienced demanding requirements in travel consulting (Appendix 7, p. X). However, Brunecker remarked that some tourists try to avoid the high helicopter fares and underestimate the importance of helicopter flights in the small country Rwanda. (Appendix 6, p. X).

Pokorny contends that especially these high-end travelers tend to struggle with leaving their comfort zones. In some cases, this is caused by unforeseen, new situations or strenuous experiences that make the person feel uncomfortable. Some guests are looking for adventure excursions where they can learn from new experiences, but generally anything that makes them leave their comfort zone and sacrifice their luxury is usually not in their interest because they are used to their own standards (Appendix 5, p. X).

Another important consideration for high-end tourists is the safety of a destination. The implementation of safety precautions often aggravates the conditions of travel. It is not surprising that Pokorny's answer to the question

regarding what the most important thing for high-end tourists is was swift and straight to the point: Safety and unique experiences (Appendix 5, p. X).

According to all of the interviews, high costs do not pose a significant problem for these kinds of travelers. There are some tourists who are already aware of the special tourism in Rwanda, and they appreciate the reason for the high price strategy in regards to wildlife activities. While Pokorny described that their clientele has no problems with high costs for travelling between 30,000 to 100,000 USD (Appendix 5, p. X), Brunecker mentioned that there is still a percentage of 20% who are shocked and thereupon refuse the trip (Appendix 6, p. X).

In the interviews the Rwandan tourist suppliers were asked what they thought about the high-end tourists from Germany, but they had even more difficulty answering this question than the German tour operators. They perceive European tourists as a whole and do not see any differences between them, but they said that they receive Germans on a regular basis.

4.1.2 Purpose

During the course of speaking with the interviewees about the behavior of high-end tourists, it is apparent that there is a shift in mentality within the high-end sector, and that classical materialistic values are growing less relevant. This type of change is characterized by Pokorny as the increasing importance of meaningfulness. The tourists are questioning the luxury to gain a better understanding of what really takes place on-site, which, according to Pokorny, is particularly prevalent among Germans (Appendix 5, p. X). In the booking process and while travel consulting, the tour operators felt that customers appreciated information about the projects of these lodges, and on site, they showed themselves interested in the practices and went backstage to learn more about the solar power and water purification plant or asked to visit schools and kindergartens, which are supported by the lodges. But it also goes beyond curiosity. Their questions reach further than asking about the projects; they want to know what they can do to assist and contribute. They enjoy being involved, in order better to understand the place where they are staying, as well as asking for philanthropic elements or giving back and are interested in seeing their positive contributions to local communities and the environment. This point is summed up by Nzayo as follows:

Guests are choosing longer stays at one destination [...] because they have a desire to immerse themselves in the place – learning about local culture, landscape and animals, and to become more involved, making travel more meaningful. (Appendix 2, p. X)

In response to a question concerning the importance of sustainability for high-end tourists, it became apparent that there are still discrepancies. Baas and Brunecker saw an increasing awareness of sustainability, which mainly started within the last few years, which can be recognized by more offers and acceptance of carbon offsetting, which goes hand in hand with a greater awareness of the issue of climate change (Appendix 1, p. X; Appendix 6, p. X). Today, guests are increasingly concerned about their footprint and their impact on the environment, and they want to get informed about it (Appendix 5, p. X) and don't mind paying more said Brunecker (Appendix 6, p. X). The opinions from Baas and Nzayo are confirming his statement, as they see those high-end travelers value conservation efforts of lodges as well if these luxury lodges keep it authentic and adapt the lodges to the surrounding environment

(Appendix 2, p. X; Appendix 1, p. X). Pokorny, however, described it as an awareness of preserving the earth for future generations and mentioned that this is not related to sustainability. Ecological and sustainable conscious behavior are out of place in his opinion, because if a person is traveling by airplane to Rwanda, they are everything, but not sustainable. According to Pokorny, high-end tourists' behavior is influenced more by their desire for meaningful experiences (Appendix 5, p. X), which can be attributed to their purpose for traveling.

Even though the awareness of conservation and sustainable projects is described by almost all interviewees as an important part for high-end tourists, the customers do not have any special requirements in terms of sustainability, which they set as a condition, claimed Hartmann, while she shows herself surprised. This topic is, in her opinion, still irrelevant for the vast majority of customers (Appendix 7, p. X). Yet, said Pokorny. Pokorny stated that he could envision this happening in the future. From Pokorny's point of view, there is an awareness of the issue, but it does not appear to be top of minds of the majority of people. As a result, it is the responsibility of tour operators to communicate the sustainable efforts of lodges when they provide travel consultation (Appendix 7, p. X; Appendix 5, p. X). This is in line with Brunecker's assessment that acceptance of sustainability factors, which are associated with higher costs, is determined by the communication and explanation provided by travel consultants in the booking process.

Hartmann urged tour operators to place a higher priority on sustainability, in particular given the fact that travel, as already noted by Pokorny, is anything but sustainable. This makes it even more important to improve the image of travel. But at the same time, Hartmann admits that they have to impose this on their customers, since the initial desire does not come from themselves, which she explained with an example of a flat-rate carbon offsetting payment, which is automatically added to each travel offer.

The Rwandan tourism stakeholders came up with similar answers and perceive a rising interest in sustainability on-site. Nzayo pointed out that "travelers are increasingly expecting responsible, ethical and sustainable destinations that do not compromise on luxury" (Appendix 2, p. X).

4.1.3 The Experience

Apart from the trend toward a more meaningful travel experience, it was evident that they all agreed that the most important part for high-end visitors is the experience. The quality of the experience played a central role in all interviews, regardless of the perspective of tour operators or on-site stakeholders of the Rwandan tourism industry. Baas said, "it's all about your experience and the purpose of the travel and maybe less about how luxury the linen is that is on your bed" (Appendix 1, p. X) and Nzayo claims "luxury is not a unique selling proposition" (Appendix 2, p. X) in the high-end segment and the tourist experience comes first. Brunecker pointed out that for German travelers particularly, the experience is much more important than the accommodation (Appendix 6, p. X).

What emerges from the interviews is that the experiences must be something special, but also refer entirely to the different expectations and images in the travelers' minds (Appendix 6, p. X). Again, the on-site touristic providers were more concrete, using adjectives such as authentic and exclusive, which corresponds to their longing for privacy

(Appendix 1, p. X). Nzayo went even further, noting that: “The new luxury will be pristine nature, a light footprint, and holidays that make a difference, clean air, open spaces, and simplicity of design” (Appendix 2, p. X).

As a summary, the following table (Table 3) comprises the most important areas of expectations for high-end tourists and briefly describes them.

4.2 Rwanda’s Perspective

4.2.1 Rwanda’s Image

This emphasize on conservation is the result of Rwanda attaching importance to wildlife and seeing it as its duty to protect it, according to Baas (Appendix 1, p. X). Singita, as a global brand known for conservation, was even invited to Rwanda by Rwanda's president, Paul Kagame, further to drive conservation efforts and enhance Rwanda's tourism strategy by increasing high-end ecotourism offerings. In general, the targeted tourism strategy is to attract high-end tourists and prevent mass tourism or, as Nzayo described it, as “high-volume low-impact ecotourism” (Appendix 2, p. X). Taking this approach is vital to the conservation mission, since a large number of people would transform the gorilla experience into a zoo (Appendix 1, p. X; Appendix 5, p. X). This would disturb the wildlife and could result in the displacement of endangered mountain gorillas.

When asked about the image of Rwanda as a destination, a point which was found in X of X interviews, was the safety aspect, which is compared to other African countries surprisingly well. The government is “raising the profile of destination Rwanda, into one of the safest, most sought-after bucket-list trips in Africa” (Appendix 3, p. X). They perceive Rwanda as a safe and well-organized country, with the aim of promoting tourism and attracting investors, which the government needs in order to achieve its ambitious development goals. It was evident from all interviews that Rwandans were satisfied with the government in general.

Compared to Uganda, with whom they share the VNP and thus also the number one attraction, the mountain gorillas, Rwanda is also safer and further developed, which led Baas to say that tourists will have to come to Ruanda, if they are looking for “a very seamless experience” (2021, p. X). Especially when it comes to the high-end experience, the Rwandan industry is much more evolved in terms of luxury, stated Brunecker (Appendix 6, p. X). Even though all interviewees admitted that Uganda is a beautiful country, tourists face problems like corruption and stealing, noted Nkubana (Appendix 4, p. X).

In regard to Rwanda's reputation as a country still associated with the genocide, the interviewees slightly differed in their opinions on the issue. Some noted that the tourists are preoccupied with concerns like safety issues. Nevertheless, they are agreeing that the situation is changing, and the image of Rwanda has improved. They all agree as well that the experience tourists have in Rwanda is completely different and does not confirm their preoccupation, which may have previously existed.

4.2.2 Transportation

Infrastructure is key for pleasant transport, but due to the hilly landscape and roads as the only way for transportation on the ground, trips in Rwanda usually take a lot of time. This forces tourists, who want to avoid that situation to

take helicopters for travelling longer distances in Rwanda (Appendix 6, p. X), since Rwanda is too small for domestic flights, and the few existing ones are often delayed or cancelled (Appendix 7, p. X). Those lodges offer the possibility to arrive by helicopter, and tour operators are taking this into account while planning the tour.

4.2.3 The Lodges

Nzayo observed that guests are craving open spaces and simplicity in design. During their vacation high-end tourists do not want to renounce luxury, when they travel to Rwanda and stay close to nature. These guests are looking for clean air and spending more time close to nature, the lodges are in close proximity to the National Park and designed in a nature way. The materials used for the construction are usually local and made of wood or volcanic stone, but at the same time, they match these criteria with high luxury standards and keep the focus on traditional interior and décor. To address the longing for open spaces, the lodges are often very spacious, and large glass fronts are used to let the guests feel they stay directly in nature.

In Singita, there are 8 suites and one villa (Appendix 2.2, p. X) and Bisate only has 6 lodges for their guests (Appendix 1, p. X). The bar and restaurant belonging to the premises are closed for external people, whether its locals or guests from other hotels. Nobody except the own guests is allowed to enter the properties and security people are at the entrance. Everything is behind a big wall of volcanoes stones, which limits the view from outside on the property, and the land is so wide that you do not feel cramped. That's what the author experienced while visiting Singita.

Hartmann outlined that the lodges in Rwanda invest a lot of money into sustainability projects and conservation, like reforestation. When asked about sustainability at Singita, Lydia gave a very detailed answer. Singita promotes themselves as a leader in conservation and luxury ecotourism, with a 100-year purpose to protect and preserve African wilderness for coming generations (Appendix 2, p. X). They focus on the combination of luxury aspects with conservation, which they consider in an "interdependent relationship between biodiversity, sustainability and community partnerships" and have the commitment to reduce their own and their customers' ecological footprint (Appendix 2, p. X).

Similar was the answer of Baas; she mentioned Wilderness Safaris sees itself not only as a hospitality organization, but also as a conservation organization, with a strong vision and mission. Wilderness Safaris already started in 1983 with a focus on conservation and represents a pioneer in this area, which is known and respected by tourists, according to Baas (Appendix 1, p. X). The focus on luxury is there. "Everything should be 100%, very good and good quality, delicious foods, perfect service and all of that" (Appendix 1, p. X). The ecological part at Bisate is dominated by their reforestation program to expand the VNP like at Singita, with success to sighting more wildlife near the lodge, like gorillas, jackals, servals and golden monkeys. They remove invasive species like Eucalyptus to replace it with indigenous trees. But their contribution to the community and social aspects are also considered. Bisate has environmental clubs in primary schools around their lodges in Rwanda, where they teach pupils about conservation, nature and sustainability, to demonstrate benefits and to ensure more acceptance among the communities.

4.2.4 Pricing

The addressed people for this kind of travelling are very affluent and, as Lydia said, high-profile people (Appendix 2, p. X), so pricing is mainly negligible. Rwanda is using the price as a method of limiting the number of tourists and at the same time maximizing the tourism revenues. Uwingeli mentioned the case that Rwanda increased the gorilla permit from 750 USD to 1500 USD and this didn't lead to a decreasing number of visits, which makes him confident with the pricing strategy and decision they made (Appendix 3, p. X). Everyone agrees that Rwanda is forced to go this way, due to the limited space the country has and to be able to meet the needed standards in conservation. Other positive side effects highlighted by Baas are that it makes the experience even more exclusive and something special for guests (Appendix 1, p. X).

When the tour operators were asked for feedback regarding the value of money the tourist experienced on-site, they all unanimously responded that the tourists they talked to after their Rwanda trip were overwhelmed and satisfied, to which especially the unique experiences like gorilla trekking contributed (Appendix 5, p.X).

Prosper also mentioned the tourism revenue sharing program, which lead to increasing income for local communities, when the tourist revenues increase. The program comprises a kind of tax of 10% of the tourism revenues in order to support community development projects (Appendix 3, p. X).

4.2.5 Activities

The high-end lodges make an effort to provide an unforgettable experience for their guests, however some activities are not provided by high-end lodges, such as gorilla trekking. In this case, the lodges are expected to work closely with the RDB, who are responsible for the gorilla trekking and the experience the guests receive. Both parties, for example Lydia from Singita, and Uwingeli from RDB, praised their cooperation, and the RDB does take into account to maintain the service level, these high-end tourists get at the lodges and that these guests and also expect this from RDB (Appendix 3, p. X).

The gorilla trekking experience is based on exclusivity too. The limitation to the maximum of 96 visitors per day (Appendix 2.1, p. X), makes the tour more private and exclusive for guests, as these close encounters are not comparable to any zoo. And it also makes you feel like you are not disturbing, interrupting or harassing these animals. (Appendix 1, p. X)

As can be seen from this explanation of Baas, these smaller groups enhance the experience and make the situation even more remarkable. Besides being detrimental to wildlife conservation, this also undermines the high-end experience and special impressions during wildlife interactions.

In the same manner, Hartmann pointed out that in the Akagera National Park there are relatively few lodges, and the park is not as commercialized as other wildlife national parks in Africa, so there are fewer visitors, and the park is less crowded. Hartmann noted that this further enhances the experience of the guests (Appendix 7, p. X).

All the high-end lodges implemented nature-related activities into their tourist experience. At Singita, as well as in Bisate guests are invited to plant indigenous trees, to help with the expansion of VNP, the habitat of mountain gorillas (Appendix 1, p. X; Appendix 2, p. X).

At Singita, Lydia said, they “emphasize slowing down the entire experience creating the opportunity for guests to walk, learn, connect with nature, to sit quietly and meditate” (Appendix 2, p. X) and “awaken their senses” (p. X).

The lodges give tourists an opportunity to engage themselves, like already mentioned with the contribution to the reforestation project. Baas described all these small projects as appreciated by guests: “they feel like their contribution is not just their visit to Rwanda, that it is a bit further reach into conservation, community and development” (Appendix 1, p. X). As well the involvement in local communities and getting to know the culture is part of the experience at these lodges. Baas said that guests are “welcomed into the lives of the people that live around Bisate Lodge” (p. X). Since the staff is mainly from the region (Appendix 1, p. X; Appendix 2, p. X), the guests have the possibility to talk to them and get involved (Appendix 1, p. X). Nkubana confirms this behavior with his experiences at Sabyinyo Lodge. Around the lodges are living mainly poor farmers, which the guests perceive and makes them help those people (Appendix 4, p. X).

Nkubana provides an example of this behavior. The SACOLA organization offers tourists at the Sabyinyo Lodge the opportunity to donate a cow to a family in need in order to support local communities (Appendix 4, p. X). Pokorny knows of many customers who are committed to helping beyond their travel time and stay engaged (Appendix 5, p. X).

In Table 4 the tourists’ requirements, as presented above, were categorized and compared with the existing offer of destination Rwanda.

5 Discussion

According to all interviewees, the typical German high-end tourist was difficult to describe, and this shows that there is no such thing as the typical German high-end tourist. In general, upscale tourists are seeking out destinations that provide a safe environment and a good infrastructure to facilitate their travels. Since most of the tourists in this group are affluent, money is not the primary determinant in the decision-making process, but the value for money shouldn't be underestimated, as they expect something in return for the amount of money they spend on vacation. Apparently, this is going hand in hand with their requirement for high levels of quality. It has been described that they are people who are deeply rooted within their comfort zone and do not seem to be interested in stepping out of it. The high-end tourist market has acquired an understanding of luxury that is more purpose-driven than materialistic and there is a growing preference for experiences. The travelers want their traveling to have a meaning and have a growing concern for sustainability. For travelers of this kind, uniqueness, authenticity and exclusivity are of great importance to them while on a trip and they attach great importance to the experience during their trip.

From the Rwandan perspective, high-end lodges in Rwanda already take this into consideration very well. In order to limit capacity and foster exclusivity, the properties tend to be large and have fewer rooms. Furthermore, sustainability is an important component, not just for Rwanda as a country, but also for the lodges. Numerous projects are undertaken to promote conservation and education of the local population. Gorilla trekking is a unique experience Rwanda can offer to tourists, and as a destination the country is safe, but has some infrastructure concerns.

Additionally, the study showed that Rwanda can be considered as an ecotourism destination according to Jones's established criteria (2020, p. 14). All four of these national parks are known for their diverse biodiversity and are habitats for many endangered species. Based on the results of the study, Rwanda can also be considered to be a safe country, particularly in comparison with its neighbors, such as Uganda, which has a similar tourist offer but is far less developed and less secure, according to the interviewees. Furthermore, the government is very ambitious in providing stability and enhancing the economic environment for businesses and so, for private investors, with organs like the RDB and programs like the tourism revenue sharing in order to support communities, meet their needs and increase acceptance.

Firstly, the author will discuss the sub question, whether sustainability plays a role in the high-end segment before discussing the overall contribution of ecotourism to the high-end experience on the basis of the identified factors: the experience, accommodation, purpose, pricing and destination in order to answer the main thesis of this research.

5.1 Is the Sustainability Factor a Decisive Argument for a Booking Decision?

When it comes to the comparison between the interviews of tour operators and lodges on-site, the results show, that both sides observed sustainability becoming more important for travelers. But there is a discrepancy noticeable, too. Tour operators said that guests don't actively ask for sustainability efforts of lodges in the booking process. The tour operators are the ones who are pushing this topic into the traveler's mind and bringing attention to it. While Hartmann perceived the high-end tourists as not too committed to sustainability, Brunecker and Pokorny noticed some interest, after the travel consultants had to explain the advantages and reasons for extra costs and awaken their sensibility for sustainable efforts. Their assessments show that sustainability is not top of mind among high-end tourists and lead to the assumption, that sustainability is a nice feature of a location which was presented to them, but it's not too important to influence the final decision. This could be confirmed by the statement of Pokorny, regarding the hypocrisy when sustainably oriented tourists fly, since taking the plane is anything but sustainable in his opinion.

In the conversation with Brunecker, he pointed out that after travel consultation and an explanation of all sustainability advantages, the majority preferred the option which was more environmentally friendly. Even if this is not an indication of a strong conviction for the topic of sustainability, an awareness of this subject is evident. In addition, Pokorny's perception of the desire to preserve nature for future generations may be interpreted as an understanding of sustainability, even if he did not explicitly mention it.

From the lodge's perspective in Rwanda, one can speak of agreement that high-end tourists care about sustainability. They report interested behaviour for their projects and efforts, as they actively ask about them and are willing to get taught about them. The high-end tourists are inclined to visit the projects, like kindergartens, schools and other community projects, which would not be necessary if sustainable values wouldn't be important for them. Since they already booked a stay at a sustainable destination and their guilty conscience would have been calmed, there wouldn't be any need to show any further interest in deep diving into the lodge's projects. This shows that the awareness of a need for more sustainability exists, and people are concerned.

Additionally, sustainability is becoming more and more awareness, since topics like climate change and the related bad news are taking up more airtime in the media, which can be a driver for heightened concern.

However, the research has shown as well that there is an unequal perception between tour operators and the tourism industry on the ground in Rwanda. The author sees three different reasons which could be responsible for that result. These lead to the following hypotheses: assuming that German high-end tourists care for sustainability, but they don't tell the tour operator while travel consulting, it could be assumed that (1) the interest in sustainability awakens only on-site and is actively demanded by tourists, (2) the tourists really don't care much about sustainability and the hotels are giving more relevance to sustainability as needed, to pursue the driving markets approach or (3) the German tourists are the ones who do not care much about sustainability, whereas tourists from other source markets indeed care about ecological and social aspects while travelling. These three hypotheses provide opportunities for further research in this area.

The results show that sustainability is not top of mind by high-end tourists, but there is definitely a trend towards more relevance that is noticeable, and tourists start to care more, even if it is not directly considered initially by tourists and at the present time not yet very pronounced. Right now, it is up to the tour operators' communication and outlining of the sustainability advantages and the lodges who must provide sustainable experiences, to further drive this demand.

5.2 Is Ecotourism Contributing to the High-End Experience?

To evaluate in which way ecotourism is contributing to the high-end experience on site, the definition of ecotourism, which relies on the core-criteria nature, education and sustainability, will be compared with the needs of typical high-end tourists and offerings of the lodges on site.

The results from the tour operators and the high-end lodges in Rwanda do not completely coincide under the consideration of nature as an important factor for traveling. From the interviews with the tour operators, it appears that nature is not a determining factor for the trip itself. But they are interested in nature conservation and preservation for the future, which can be interpreted as a certain interest in nature. In addition, it must be assumed that when choosing a destination such as Rwanda in conjunction with wildlife experiences, there should be some connection to nature. The high-end lodges in Rwanda embody nature in themselves. The lodges are not just built within nature, they are mainly constructed with natural resources and adapt well to the environment, to ensure a close to nature experience and totally address people with a longing for close to nature experience and clean air, as Nzayo described.

The second core-criteria education shows way more overlaps between the tourist's behaviour and the destinations' offering. All interviewees described their perception of a growing interest in what camps are doing and their contribution to the environment, wildlife and communities which is not just a topic in the booking process, when the travel specialist is describing the lodge. The guests continue to show their curiosity and interest as well on-site, when it comes to specific projects of the lodges. This shows that high-end tourists have a willingness to learn. On the Rwandan side, the high-end lodges address this demand, with short trips to communities, where travelers can

experience and apprehend the culture and local people. This demonstrates that this ecotourism core-criteria fits well in high-end tourism, as well as it is being perceived and integrated into the tourism experience in Rwanda by the high-end lodges. As well the RDB, who is responsible for the gorilla trekking in the VNP includes the learning component into the experience. Singita, for example, also contributes to the full gorillas' experience, when they give their comprehensive gorilla briefing in the conservation room. Which additionally makes the experience even more unique.

The third core-criteria comprises sustainability. As the answer to the first sub-questions showed, sustainability is not that relevant in the booking decision for high-end tourists at the moment, but it is becoming more awareness. Therefore, the author will just compare that demand to the offerings and ambitions of the destination Rwanda itself. As mentioned in the theoretical foundation, Rwanda itself attaches great importance to sustainable development. The lodges have high conservation standards and integrate sustainability into their high-end concepts. The results demonstrate that the lodges are delivering on their sustainability promise, as evidenced through successful projects such as the reforestation programs that are expanding wildlife habitats through an expansion of the national park.

The findings on core criteria suggest that there are certain parallels between high-end tourism and ecotourism. Especially the education criteria seem to align the most of these three, while sustainability is getting more into focus for the high-end travellers, the full potential is not yet achieved.

The efforts in the core criteria nature and sustainability seem to exceed the needs of high-end travellers. Especially with regard to sustainability, the results show that the demand from the tourists' point of view would not exist without the explanation and the pointing out of the travel experts and still the efforts in sustainable projects of the high-end ecolodges are definitely far more elaborated than initially demanded by the German target group.

The results of the two questions, whether ecotourism is contributing to the high-end experience and the factor of sustainability within the booking decision is where Beaumont's driving markets approach can be considered (Beaumont, 2011, p. 138). High-end ecolodges need to drive sustainability education and implement sustainability into their communication and marketing. The integration into tourism activities can raise awareness for greater sustainability among these high-end travellers. In fact, they have a very good chance of doing so, as nowadays sustainability is becoming an increasingly important part in many people's life. But as Hartmann mentioned, the tour operators have a stake in this evolution as well (Appendix 7, p. X). They are the ones who must make the tourist aware before they book a destination and delineate the advantages, so high-end tourists decide in favour of sustainable options.

5.2.1 The Experience

The increasing relevance of the experience itself and more meaningfulness in travel outlines that the luxurious part and materialistic values are getting less attention from the guests. The questioning of the materialistic values is according to Pokorny especially among Germans well developed, but as others haven't confirmed this statement and a comparison with high-end travellers from other countries is missing, one cannot say that this is a special characteristic of German high-end travellers. Luxury is becoming more a minimum standard for high-end lodges and

to convince customers a unique experience is needed. Under the consideration of the experience the destination Rwanda as well as the high-end lodges on-site presents itself very well. The results revealed that high-end tourists attach great importance to values such as exclusivity, privacy, authenticity and uniqueness.

Another promising finding is that projects such as reforestation are not only beneficial for the wildlife in the national park itself, but it also brings them closer to the lodge and thus to the guests. A side effect and advantage are that these unexpected wildlife encounters contribute to an unforgettable and unique experience.

A contradiction in the findings can be found in the statement that high-end tourists are deep in their comfort zone. This would indeed be a problem for a destination like Rwanda, since the options for transportation are limited and comfortable travelling is just possible by helicopter. It is especially problematic with safaris and monkey trekking. This requires a lot of willpower to move in the mud and to get very close to nature. But the cooperation between the high-end lodges and the RDB showed, that the staff of the RDB takes the high standards of the upscale tourist into account to maintain the service level.

5.2.2 The Accommodation

As already described in the theoretical foundation from Atwal & Williams, the results confirm that the materialistic component is getting less important for high-end tourists. For these guests the experience is much more important. But the survey of the interviewees also shows that luxury continues to have a high priority. Pure luxury can no longer be counted as a prerequisite for a booking decision, but not just because it is no longer important to tourists. Luxury is still important to them, and they see it more as a minimum requirement of an accommodation where they want to spend their vacation and it is therefore essential for ecotourism projects in this high-end segment to maintain a high standard in order to keep up with the demands of this sophisticated target group.

The results show that the lodges themselves contribute a lot to creating authentic experiences. In the case of Bisate and Singita, the furnishings are very extravagant and distinctive. They pay attention to local traditions and design, which they incorporate into their luxurious standards and style of the lodges. This provides an authentic local experience for guests, which is fully focused on Rwanda and the nature experience.

The limitation of rooms as well contributes to the high-end experience at the lodge, because less people mean more exclusives. As well this provides more privacy, which is ideal for high-profile tourists, since they are probably known and want to spend their vacation undisturbed.

5.2.3 The Purpose

Another promising finding, which at the same time confirms the result that there is a shift away from materialistic values, is that the purpose is a determinant argument for a travel decision in the high-end segment. Additionally, this is contributing to the assumption that sustainability is becoming more relevant. High-end travelers pay attention to what they spend their money on. The interviews showed that they actively question this on site and value philanthropic activities. Their goal is to give something back on vacation. Of course, this can be due to a guilty conscience, but in the end, it comes down to whether they take advantage of the opportunities for engagement.

And the results depict that they value these givebacks, but the anticipation in the booking process seems to be the same as with sustainability. This is not really surprising, since sustainability and philanthropic behavior both presuppose a certain renunciation of one's own needs. It can therefore be assumed that the demand for significant trips with positive effects for local populations will also increase in the future. On-site, according to the tourism providers, the acceptance of these activities and the will to help already exists. This finding is evidence that ecotourism projects can enhance the travel experience for high-end tourists. Above all, ecotourism, which is based on the three core criteria, includes the sustainability component, where the social component can be equated with this philanthropic manner, but also the will and understanding to preserve nature for future generations and to engage for that goal on-site, fits well with the ecological component of ecotourism. The lodges also integrate this very well and embed these social and environmental projects into their on-site experience to be able to satisfy the need of the high-end tourists to get involved, with projects where guests are invited to plant a tree at Singita or Bisate, as well as the one cow per family project from the Sabyinyo Silverback Lodge.

5.2.4 The Pricing

It turned out that pricing is a secondary and more irrelevant factor for high-end tourists, which is quite important for the high-end ecotourism segment. High-end lodges have by default, due to their high standard, prices at the upper edge, but with the combination of costly sustainability concepts for avoidance of air conditioning, recycling and waste reduction and use of local resources, which must be additionally considered in the construction of the lodges, lift the already expensive prices to another level. In addition, there are these projects, such as reforestation, school projects, as well as scholarships for students, which the high-end tourists have to finance indirectly through higher over-night prices.

Nevertheless, wealthy tourists do not spend their money indiscriminately and pay attention to good value for money when choosing a destination. The results of the interviews with tour operators depict consensual, that the price-performance ratio is balanced in the case of high-end destinations in Rwanda, which can be deduced from the fact that all guests express satisfaction, and no negative feedback comes back to tour operators while and as well after their tours.

The results demonstrate that the high price strategy resulting from the limitation of gorilla permits per day in order to reduce the number of visitors is not just helpful in terms of conservation, since it provides more protection for the gorillas in their habitat, but at the same time it makes the experience even more exclusive and thus promotes high-end tourism. From this it can also be deduced that ecotouristic activities contribute to high-end experience.

5.2.5 The Destination

While the results show that safety is one of the most important requirements for a high-end destination, it also gets confirmed by all interview partners that Rwanda is safe. Additionally, these high-end ecolodges have a certain status that stands for reliability, as Hartmann described. Rwanda as a destination benefits from their reputation, because high-end tourists know what to expect in terms of service and accommodations and at the same time project these values onto Rwanda. They therefore act as a seal of trust for this destination, as they radiate security, and it is fair to

say that these high-end ecolodges are making a big contribution to the perception of Rwanda as a safe destination. But on the other hand, which has to be admitted, is that this is probably not related to ecolodges in particular, since other globally known brands would probably have the same effect on high-end tourists, as long as they trust these brands.

However, the results also show that Rwanda's infrastructure is not crumbling. Streets are in good condition and can be used for car transportation. But the hilly landscape severely limits possible fast travel conditions, with Rwanda being just the size of Brandenburg, short distances can take a tremendous amount of time. The results showed that these high-end tourists are sophisticated and value comfortable travelling and especially Africa experienced tourists are experienced to fly everywhere. Compared with the existing infrastructure of long car distances and almost now domestic flights, there just remains the possibility to travel by helicopter, if it comes to convenient and fast travel, what makes traveling in Rwanda very costly.

5.3 Limitations

The practice of conducting interviews simultaneously on both the supply and demand sides proved to be unfavorable. These results from the demand side would have been helpful in structuring the interviews with stakeholders in Rwanda, which represent the perspective from the supply side. As a result, a more precise coordination of the questions could have been achieved. While these are special times through COVID, which impact the tourism industry in general, it has been difficult for both parties to schedule interviews. It is understandable that many in this industry had other concerns besides interviews, because many employees have been laid off, and many businesses are understaffed, while at the same time, demand has plummeted, resulting in lost sales.

Considering the constraints of space, the discussion about the sustainability of high-end ecotourism has been lightly touched upon in this paper, which can be revisited to support further study. Furthermore, it would be interesting to evaluate whether local ecotourism products could satisfy the desire of these affluent guests to experience unique, authentic and exclusive experiences, without having to fly.

To better understand the typical German high-end tourist, a study based on a comparison with high-end travelers from other countries could be helpful. This investigation could reveal differences between the characteristics of the travelers and make it possible to create a profile of a typical German high-end tourist.

A further topic for future research could be the perspective of tourists, in order to assess the reasons for the unequal perception of the tourists' preferences when making a booking decision, and how they behave on site as described by the touristic service providers. To evaluate the changes in preferences that occur during the travel period, it would be appropriate to conduct a survey of tourists regarding their philanthropic and sustainable values before and after the trip.

Since Rwanda is focusing on diversification of the tourism products and MICE tourism is responsible for 42% of all arrivals, the evaluation of the combination of MICE tourism with high-end ecotourism would be interesting and helpful for Rwanda in order to grant sustainable growth and diversification. Especially, the part Incentives from MICE

could be the intersection of both touristic segments, when bonuses or rewards are used as incentives from companies or at conferences.

6 Conclusion

The results indicate that there are no typical German high-end tourists. In general, the segment is extremely diverse and is dependent on the requirements and expectations of individual clients, which are difficult to reduce to an example that can be generalized. It can be concluded, however, that high-end tourists place a high value on experience - this is almost above anything else and is also a driving factor in the travel decisions of high-end tourists. Luxurious accommodations can be viewed as something mandatory, which must be met in order to be considered as a destination for this upscale tourist segment. Unsurprisingly, the price is secondary in this segment. Nevertheless, the high-end tourists expect great value for money, since the price they pay is not insignificant. Besides that, a destination needs good infrastructure, a safe environment and uncomplicated accessibility.

On the basis of the results, it can be concluded that Rwanda as a destination fits well into the high-end segment. Rwanda has many aspects that are characteristic of a high-end destination, including first-class accommodations, unique experiences, and limited access. The country scores well in terms of general requirements, such as security and accessibility. It appears that its infrastructure poses the only minor difficulty. Despite the basic infrastructure being in place, the geographical conditions of the country restrict the possibilities and make travel routes long and time-consuming. Consequently, helicopter transportation is the only viable option for a fast and convenient travel experience.

Since it is proven that Rwanda is a high-end destination, the purpose of this research was to elaborate on the extent of ecotourism contributing to this. From the accommodations perspective it can be said that these ecolodges do a great job in creating an authentic experience with great exclusivity in luxurious lodges and an escapist touch, which highly aligns with high-end touristic values. In this research, the definition of ecotourism based on the three core-criteria education, nature and sustainability was used as a basis to assess the extent to which ecotourism contributes to the high-end experience in Rwanda. From the Rwandan perspective it can be said that the destination itself delivers on all three areas. The ecolodges are not just located in pristine nature, they all follow a very natural approach to deliver in terms of nature-near experiences. As well, the lodges and the RDB include activities for learning and options to go backstage in their program. The sustainability criterion is also very well fulfilled by Rwandan lodges. In fact, this can be seen as one of their focal points, at least at Wilderness Safari and Singita. Their sustainability concepts prove to be comprehensive and are deeply embedded in their practices.

However, from the interviews with the tour operators it can be deduced that these three criteria are not demanded by high-end tourists initially. They report that tourists do not come up with suggestions or specific wishes in terms of sustainable destinations or educational activities while travel consulting. This proves that there is low initial interest in sustainability, but it is up to the way of communication. The tour operators are the ones who have to explain the advantages of sustainable travel options. If it's done properly among some high-end tourists, the understanding of sustainability needs is noticeable. But sustainability is far from away from being the decisive argument, even though it is getting more into focus and at the moment it looks like it will be one in the future.

The results have shown that there is a great discrepancy between the standards and services offered on-site and the activities and accommodations demanded and desired by German high-end tourists. Due to this status quo, one cannot speak from a market driven approach, as it was described by Jones, rather this is where the use of the driving markets approach, like Beaumont outlined, can be helpful for the lodges or Rwanda in particular, to further drive the longing for sustainability, education and nature and to expand the demand. What supports the driving market approach is that all interviewees report a rising awareness of sustainability, which appeared in the recent years and is expected to increase.

Finally, it can be deduced from the results that ecotourism certainly contributes to promoting the high-end experience on site. Even if this currently happens more indirectly, such as through contributing to unique, exclusive and authentic experiences, which are values high-end tourists are attracted to and not directly through the demand for sustainable travel offers or a longing for educational and natural experiences. What should be considered, however, is that this is reflected by the perspective of the tour operators, and it could be that although tourists are interested in this, they do not actively communicate it to their tour operators. However, this contradicts the findings of the tourism providers in Rwanda, who report sustainable behaviour and an interest in this topic and confirms a discrepancy between the perception of the behaviour of high-end tour operators and tourism stakeholder on-site. This provides opportunities for further research to interview high-end tourists before and after their trip on their attitudes towards ecotourism core-criteria.

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