Projected Destination Images on African Websites: Upgrading Branding Opportunities in the Global Tourism Value Chain

Jeroen van Wijk, Frank M. Go, and Robert Govers

ERASMUS RESEARCH INSTITUTE OF MANAGEMENT

REPORT SERIES
RESEARCH IN MANAGEMENT

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Availability	
Classifications	

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Upgrading branding opportunities in the global tourism value chain

Jeroen van Wijk*, Rotterdam School of Management, Erasmus University

Frank M. Go, Rotterdam School of Management, Erasmus University

Robert Govers, University of Leuven.

* corresponding author
Rotterdam School of Management, Erasmus University
Burg. Oudlaan 50, room T7-16
3062 PA Rotterdam, The Netherlands
Phone: +31 104081923
E-mail: jwijk@rsm.nl

Abstract
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Keywords: tourism industry; global value chain; dynamic image formation; Rwanda; Uganda; Mozambique; upgrading

1

1 Introduction

Tourism represents a promising service sector that could significantly support the development of African economies. African governments that target foreign tourists are firmly supported by international organizations. The United Nations, for example, has identified the tourist sector as a means in the 'war on poverty'; to contribute towards achieving the Millennium Development Goals by 2015 (UNWTO, 2005). A major barrier, however, is Africa's troublesome image. Africa has actually two dominant images in the outside world. In the western mass media the continent is overwhelmingly associated with corruption, violent conflicts, hunger and diseases. These media glimpses led *The Economist* (13-19 May 2000) to conclude, that Africa is a "hopeless continent"

In stark contrast, Africa's tourism image conjures up gazes of wide open spaces, nature and wildlife, ready for discovery by the adventurous tourist willing to visit the past. Advertisements by Western tour operators generally depict Africa as a continent where Westerners can re-discover their "pre-industrial self" (Cornelissen, 2005). This act of stereotyping directs attention away from the specific, present realties of African societies. Stereotypes are structures containing one's beliefs, knowledge and evaluation of members of a group or nation. Accordingly, stereotyping influences the way new information is processed and its subsequent recall of stereotypical images of places and people who inhabit the African continent. In turn, stereotypical images can be given either positive or negative valances (Niemann and Secord, 1995). Western travel brochures typically portray black, colored or Indian South Africans basically as heritage products (Cornelissen, 2005); thereby perpetuating national stereotypes. Even South

Africa, the economic power house of the continent has been unable to shake its pre-industrial stereotypical image. Consequently, the dominant image of Africa, as perceived by a majority of foreigners, is increasingly challenged on the grounds that it would not reflect Africa's dynamic diversity in terms of economic growth, political stability and optimism.

Various forums have tackled the question how to "re-brand" Africa.[1] With respect to tourism development, Africa's re-branding strategies raise two issues. The first is about structure, and concerns the opportunities for African tourism suppliers to brand their destinations in the main international markets, considering their marginal position as players in the global tourism chain. Moreover, destination management organizations (DMOs) heavily rely on the Internet for information exchange and computerized reservation systems. Since most African countries have limited connections to global information and communication technology (ICT) networks, domestic African tourism service suppliers must be inventive to cope with, or circumvent, the inequality in the information society', which is commonly referred to as the 'digital divide' (van Dijk, 2005)

The second issue is concerned with content, i.e., the contribution by African tourism service suppliers to sustain the foreign stereotypical image of the African continent. In his presentation called "Africa's negative global media identity: who owns the lenses?" Mawugbe (2006) reports on a study that investigated the sources of African news

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[1] See for instance the discussion on 'Strengthening Branding and Changing Perceptions", during the 2006 Word Economic Forum on Africa in Cape Town; the article "Changing Brand Africa" in the first 2007 issue of the *International Trade Forum*; and the "Re-Branding Africa" theme during Africa's International Media Summit in 2006, in Ghana.

published in two state-owned newspapers in Ghana in 2005. The analysis revealed that 85 per cent of the articles on Africa were sourced from the BBC News Agency. Only 15 percent were based on information gathered by Ghanaian reporters working for the Ghana News Agency. The author's conclusion that the re-branding process should start from Africa itself is also relevant to African tourism destinations. It raises two issues of importance, that is: first, whether there are African organizations that may "own" the lenses and are needed to give rise to the domestically-induced formation of destination branding; second, to what extent the image that is projected to the outside world differs from the foreign stereotypes.

The Internet has become *the* medium for tourism marketing. In principle the Internet also offers a promising space for relatively marginal industry players in the global tourism value chain to reduce their dependency on the main international tour operators. This opportunity raises a central question, namely: how might African suppliers leverage global virtual networks to expand their presence through high value-added branding and marketing activities?

The relevance of the present paper is two-fold. First it contributes to the knowledge of how African service suppliers presently brand their tourism destinations in the international market. In particular, its focus is on both the structure and the content of tourism websites of three poor, emerging tourism countries in Sub-Sahara Africa: Rwanda, Uganda and Mozambique. Second, the paper contributes to the dearth of literature on the role of the Internet as an image formation agent (Choi et al, 2006: 118). Following on from the central question, this paper is largely organized along the following three sub-questions: (a) What are the opportunities for indigenous tourism service suppliers in the African countries to project their own image of tourism destinations in the international markets through the Internet, (b) which organizations can be

considered to be the 'movers and shakers of tourism branding in these countries, and (c) what dominant national destination image, if any, do these organizations currently project?

In the remainder of the paper we first position the marketing of African destinations in a theoretical framework that is based on two approaches. First, within the context of the *global value chain analysis* we explain the relative position and strategies of African tourism service suppliers in the global tourism sector. Second, the *dynamic image formation* approach is subsequently used to clarify the Internet-based marketing strategies of African service suppliers. In the third section, we explain the methodology that is used for the tourism website search and content analysis. Section five presents the results, while the final section draws conclusions and explores avenues for indigenous African tourism firms to upgrade their capabilities in modern destination branding and marketing skills, thereby improving their position as actors in the global tourism value chain.

2 Global value chain analysis in the tourism industry

The role of coordination aimed at enhancing the value-creation process and, by extension, provider performance, is crucial. Global value chain (GVC) analysis is a systematic approach that focuses on transnational networks of companies, aligned in value chains (Gereffi and Korzeniwicz, 1994).[2] The GVC approach offers an analytical model to understand the nature of ties between geographically dispersed firms of all sizes that are linked together in global markets. GVC analysis helps identifying the underlying global

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[2] GVC analysis was developed under the name of 'global commodity chain', but the term 'commodity chain' has been replaced by "value chain' in the recent literature in order to enable coverage of those products that lack commodity characteristics (Gibbon and Ponte 2005: 77).

organization of an industry in order to uncover basic power relations within the chain as well as the allocation of economic surplus (Clancy, 1998: 125).

Relationships and dependencies among actors in the chain is a key issue in GVC analysis. Some value chains are dominated by one firm that has (vertically) integrated a large part of the value added activities of the chain. In other chains, lead firms have emerged due to global outsourcing and concentration. In the retail sector, for example, lead firms increasingly dominate suppliers through their market power and forms of hands-off control, rather than through formal ownership. Lead firms own a technology, a highly valued brand, and market knowledge that is vital to the entire chain. Since their strategic decisions impact all other actors in the chain, lead firms *de facto* are capable of governing the chain, i.e. setting the quality standards for the entire chain (Gereffi et al, 2005; Gibbon and Ponte, 2005; Humphrey and Schmitz, 2004).

A second important element in GVC analysis is the intra-chain competition, i.e. competition among the chain actors. Whereas the lead firm may push for lower supplier prices and higher quality standards, suppliers and traders may challenge the position of the chain leader. Same can be effectuated by a process of 'upgrading', i.e. the movement by chain actors from low-value to relatively high-value activities in global production networks (Gereffi and Korzeniewicz, 1994). The most commonly used categorization of upgrading, identified by Humphrey and Schmitz (2004)**,** involves: (a) process upgrading (more efficiency); (b) product upgrading (more sophistication); (c) inter-chain upgrading (diversifying into alternative value chains), and (d) functional upgrading (the acquisition of new functions in the chain, such as processing or design, marketing, branding). Since

the latter process is about taking over functions from other firms, the targeted competitor is expected to strike back. Functional upgrading aspirations thus may result in either a rivalry among suppliers in the chain (Meyer-Stamer, 2004: 338-340), or clash with the core competencies of the lead firm (Humphrey and Schmitz, 2004: 359).

In this paper we examine the global value chain of tourism. Transactions within the chain can be analyzed from two perspectives. First, a so-called business-to-business approach, which explores the role and relations amongst suppliers and intermediaries along the chain, including their contestations and negotiations, which usually entail the mobilization of arguments about what entails value-adding and for whom during the various stages prior to tourism services being sold to consumers. Secondly, there is the 'business-to-consumer' approach, which implies that the tourist moves upstream into the value chain, thereby by-passing the intermediaries and purchasing various services from the individual service suppliers. Against this background, tourism services should be perceived as modules, to be either tightly coupled through long value chains or loosely coupled in short chains, e.g. via a combination of tourist services at the DMO-level. Although both value chains result in a travel/holiday experience, the former adheres to a rather strict hierarchical and efficiency-driven regime, wherein services are typically sold through either retailer of all-inclusive package tours, supported by global computerized reservation systems, or tour operators who offer the trusted quality that many consumers appreciate. Especially in non-Western destinations, such as Africa, intermediaries play a crucial role to help Western-tourists bridge the gap between travel expectation and experience.

The shorter chains, targetting at independent travellers, involve tourism services that are typically not packaged, affording tourists a sense of freedom and more spontaneous trip planning. Independent tourism service suppliers increasingly use the Internet for their own 'business-to-customer' (B2C) sales. For instance, airlines, hotel chains, and Internet-based travel platforms offer online booking opportunities, thereby allowing travellers to plan their own holiday itinerary. Access to a home PCs is all it takes to embark on a dynamic "mix-and-match" process that, at a bundled price, may include the purchase of airline tickets, hotel rooms and rental cars. According to the Yahoo! Summer Travel Survey in 2007, 61% of online Americans turn to the internet for vacation recommendations . In Europe, the 2007 online travel market was worth €49.4 billion, represented 19.4% of the market, according to the Centre for Regional and Tourism Research, Denmark (Marcussen, 2008). This was up from €39.7 billion in 2006 when it represented 16% of the market. Online travel sales in Europe increased by 24% from 2006 to 2007. A further increase of about 18% during 2008 to about €58.4 billion (22.5% of the market) is expected. .The global tourism value chain is therefore increasingly variable in length, with both tour operators and suppliers performing high value-added functions, particularly in marketing and branding.

Moreover, the sale of tourism services is not the only B2C encounter in the tourism value chain. Tourism services are corporeal in nature, and consumption necessarily takes place *in situ*. Travellers move to the production locations to consume the tourist experience, and enable B2C encounters both during the trip and upon arrival in the destination. An important question is whether individual suppliers are capable to leverage functional

upgrading opportunities at the numerous 'touching points' in order to enhance the travel experience and benefit their business partners in the tourism GVC.

In the organized tourism context, African tourism service firms hitherto have depended on multinational corporations in the global tourism value chain, typically an international tour operator, to persuade Western markets of the attractiveness of African destination images. Presently, the web has turned the traditional distribution channel on its head. This creates opportunities, but only with access to the specific capabilities of hotels and airlines, and applying same to the own marketing skills. Significant product and process upgrading is required to make African tourism destinations more attractive to a wider public. African destinations hold a marginal competitive position in the international tourism market, which is reflected in the relatively small number of visitors: only three per cent of international travellers end up in sub Saharan Africa (UNWTO, 2007). Inter-chain upgrading, i.e. diversification into alternative tourism value chains, is potentially promising. A wave of affluent middle class tourists is emerging in China, Brazil, Russia, and India over the next 10-15 years (Future Foundation, 2005:15), and African destinations could cater to these new markets.

In view of African image formation, the most relevant category of upgrading appears to be functional upgrading. The source of power in most global value chains lies increasingly in branding, marketing, product development and coordination of inter-firm relations. Due to the bad overall image of the continent, and the high level of investment that is required to join the global reservation systems, African tourism service suppliers largely depend on trusted international tour operators for their sales. This dependency has

two consequences for African suppliers: (a) they play an insignificant role in the high-value added functions of destination marketing and branding in the main tourism markets, because these nodes in the value chain are looked after by multinational lead companies, and (b) they can only play a very limited role in the formation of the projected image of African destinations, which, again, is covered by the lead firms in the value chain.

The dependency position that African tourism service suppliers find themselves in creates little, if any domestic wealth, and therefore renders an exploration of opportunities for functional upgrading, particularly relevant. From a tourism GVC perspective, at least three strategies may be applied:

(1) Enhancing reputation: Because travelers move along the value chain to consume services with individual suppliers, those suppliers are offered a unique opportunity to build and enhance their reputation directly with end consumers.

(2) Shortening the value chain: Individual tourism service suppliers could use the Internet for direct marketing (and sales) to consumers in foreign markets, targeting "self catering" or "co-creating" travelers. This market segment consists of visitors who do not require holiday packaging of trusted outbound tour operators, but use the Internet to build their trip by themselves.

(3) Destination branding: Associations of individual African tourism service suppliers, supported by governmental bodies, could promote a specific country, region or city as a tourism destination. A competitive asset of African destinations is the geographic authenticity which is relevant in view of "origin-based trust" (Gibbon and Ponte, 2005: 184) in an African experience. The use of geographic indications reduces the mental

distance between suppliers and consumers, enables the former to engage in B2C marketing, and may make legal protection of the geographical tradename a wise option. Independent, international branding of the destination could enhance interest by foreign consumers, and provoke a higher demand for African destinations with tour operators.

However, functional upgrading into branding and marketing is a challenging process. In particular, it requires local tourism stakeholders in the African destination context to collaborate and develop, jointly, a distinct and competitive image, and to coordinate capabilities to represent the attainments of a tourism destination in a manner that bridges the gaps between the perceptions and expectations of the destination's services and between local tourism entrepreneurs on the one hand and visitors on the other, resulting in a return on investment.

3 Dynamic image formation

Image formation and branding imaging of Africa are key factors that influence the tourists' destination choice process and are increasingly subjected to the dynamics of global competition, away from the one-way 'push' mechanism of mass communication and fixed channels, toward the 'pull' process of interactive processes of sharing, reflecting, selecting, debating and experiencing (Molenaar, 1996, 2002). With the proliferation of the internet, its convergence with and influence on the de-massification of the media (Toffler, 1980: 165; Werthner & Klein, 1999: 69), tourism destination images are becoming increasingly fragmented and ephemeral in nature (Harvey, 1989: 293).

However, today's technologies do not merely assist us in our everyday lives; they are also powerful forces acting to reshape our behavior as tourists and our understanding of places. The use of the Internet, radically changes the communication process, from the traditional media of "the language of tourism" (Dann, 1996), based on monologue and 'unilateral communication from western senders (tour operators) to western receivers (tourists)' to its electronic equivalent, "Word-of-Mouse" (Riedl et al., 2002). This scenario opens the way for interactive communication. It not only provides the tourist with a 'voice', but also lets destination residents and other actors have a "greater say in deciding whether or not to accept tourism and, if so, what type and how it should be promoted" (Dann, 1996). Technological advancement, the global media and increased international competition affect the way in which tourism destinations are imagined, perceived and consumed.

This is illustrated in Figure 1. This model provides the basis for the detailed synthesis of the destination image formation paradigm from a '3-TDS' gap approach (Govers & Go, 2004; Govers et al., 2007), confronting host-guest (supply and demand) perspectives, based on the idea of the 5-gap service quality analysis model by Parasuraman et al., (1985: 44)) and with major contributions from Baloglu and McCleary (1999), Fesenmaier and MacKay (1996) and Gartner (1993). The internet, as a medium for projecting images, but also as a channel for vicarious place experiences (Kim & Richardson 2003) (as an induced agent in Gartner's (1993) terminology) can form the basis for a perceived destination image in the mind of the consumer prior to visit (Baloglu & McCleary, 1999; Beerli & Martín, 2004; Boorstin, 1962; Boulding, 1956; Echtner & Ritchie, 1993, 2003; Gallarza et al., 2002; Gartner, 1993; Poiesz, 1989). This

is mediated by the person's identity (i.e. self-congruity (Baloglu & McCleary, 1999; MacKay & Fesenmaier, 2000; Sirgy & Su, 2000)), potential temporal environmental or situational influences (Gartner & Hunt, 1987) (or Autonomous Agents according to Gartner (1993: 201-203)), and the direct or indirect interaction with other consumers (word of mouth/mouse (Riedl et al., 2002), or Solicited or Unsolicited Organic Agents in Gartner's terminology (1993: 203-204)).

- INSERT FIGURE 1 ABOUT HERE -

The projected image should be anchored to some extent to the identity of place (brand) (Go et al., 2004; Noordman, 2004; Onians, 1998; Van Rekom & Go, 2003; Van Riel, 1996: 34) as well as the tourism product offering, as it builds experience expectations. As the tourism industry is highly fragmented and involves many different kinds of players (attraction, accommodation, transport and ancillary service providers), a consistent and harmonized projected image obviously requires a tightly coupled regime orchestrated by the GVC (as opposed to fragmented) local business networks that tend to be orchestrated on a loosely coupled basis of value chain management. In this respect the bridging of North-South gaps seems an essential issue demanding the attention of researchers.

Content analysis of narrative representations of African destinations on the Internet can therefore provide useful insight into how the continent is presented and projected through global value chains and business networks. Investigating what is projected by various actors in the industry, would give us insight into what part of the image of the world that they have, they want to "appropriate" (Sontag, 2002: 4). Taking this into account,

different actors in the tourism industry, public agencies versus private sector-specific companies, are hypothesized to have different objectives in terms of projecting a destination image that will favourably affect their intended positioning and ultimately their customers' buying behaviour. Based on Gnoth, (2002) and Govers and Go (2005) it can be assumed that induced images vary among different actors. In a globalizing world tourism emerges as 'an ideological framing of history, nature and tradition with the power to reshape culture and nature to its own needs' (MacCannell, 1992). In turn, in the GVC context the issue may be, to paraphrase Long (1997), "how actors struggle to give meaning to their experiences through an array of representations, images, cognitive understandings, and emotional responses".

4 Methodology

The methodology used for the African tourism website research comprised of a website search and content analysis of website texts.

4.1 Website search

Tourism websites were collected from three African countries: Rwanda, Uganda and Mozambique. three Sub-Saharan African countries: Mozambique, Rwanda and Uganda. All these countries are classified as Low Income Countries (GNI per capita of US$ 825 or less) (Worldbank, 2005), where tourism could potentially have a high impact on economic development. The three countries are emerging tourism markets. Together they attracted around 5% (1 million) of the in total 22 million international visitors in Sub-Saharan Africa in 2004 (UNWTO, 2008; Verdugo et al., 2008).

The website search focused on English-language websites, and took place initially through the Google search engine, using search terms such as 'Tourism [country]', '[country] Travel', 'Gorilla Uganda', 'Diving Mozambique', etc. The tourism portals that were discovered offered additional tourism enterprises. Hard copy travel guides, such as of Lonely Planet, were used to trace more tourism suppliers that were then checked for online presence. Finally we relied on personal experiences and networks to collect tourism service suppliers that we may have missed. As later 'control searches' revealed no new relevant websites, we assume that our data set is nearing the entire population of tourism websites relevant for the three countries that were operational in 2006.

The search focused at three categories of websites:

(a) Tourism portals, which we define as online information gateways that offer links to local intermediary and primary tourism service suppliers. The portals may be either specialized in tourism or may be general interest portals with links to tourism websites. Two selection criteria were used: portals should be fully focused on one of the three countries, and they should be free of commercial interest other than of marketing the countries as tourism destinations.

(b) Intermediary organizations, which include mainly online booking agents and tour operators with a clear local linkage (see below).

(c) Primary tourism service suppliers, a category that covers all types of accommodations, safari tours, diving schools, museums, community-based tourism projects, transport, etc..

For both the intermediaries and primary suppliers the following selection criteria applied. The website (i) should represent a domestic tourism enterprise; (ii) should indicate that the owner of the enterprise is in control of the website content; (iii) may either have an exclusive domain name, or has at least one full web page dedicated to the firm; and (iv) should include contact details that enable customers to get in direct contact with the enterprise.

The data set includes a total of 449 websites (see Table 1). Ownership and server location of the websites was determined by using 'whois' queries on the website DomainTools.com. Websites with a top-level domain name (TLD), such as '.com', would give a variety of information, including the registrant or owner of the domain name, the registrant's real address, as well as the country of the server that hosts the website. For websites with a country code top-level domain (ccTLD), for instance '.rw', information was basically collected at national registration sites. Those African websites that lacked their own domain name were categorized under the registry information from their host domain.

4.2 Content analyses

In order to identify most frequently used words in the website content, automated content analysis with the software package CATPAC was used. CATPAC will work with any and all words in the text; produce a frequency table and then perform the neural network analysis on the top-X most frequently found words (the latter functionality not being used

for the analysis presented in this paper). X (i.e. the maximum number of words to be included in the analysis) is to be defined by the researcher. However, words incorporated in an exclude file are ignored. A default exclude file containing words like articles, prepositions, and other 'meaningless' words is provided with CATPAC[3], but the researcher can incorporate additional words in de exclude file.

- INSERT TABLE 1 ABOUT HERE -

Because a substantial number of websites lacked textual content, only 358 websites were used for content analysis. Text was collected from every website at three levels of website pages: the home page, the internal pages that were accessible from the homepage, and the internal pages that were accessible from the second-level pages. The texts were merged into three country files. In each file, synonyms were merged, for instance 'dive' and 'diving' ended up as two occasions of the word 'diving'. Eventually, we produced for each country a list of 60 words that appear most frequently at the tourism websites. These words were then listed into seven categories which are commonly used in the tourism literature to characterize tourism destinations (cf. Echtner, 2002; Gnoth, 2002).

5. Results: tourism websites structure and projected destination image

Table 1 provides an overview of the magnitude of websites that project Rwanda, Uganda and Mozambique as tourism destinations on the Internet. Rwanda has the smallest representation on the Internet; Uganda the largest of the three. The vast majority of the

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[3] For further details working of the programme see for a good overview please refer to (Woelfel & Stoyanoff ,1993). Among others, Gretzel and Fesenmaier (2003) and Ryan (2000).

tourism websites represent primary tourism service suppliers, except for Rwanda where these account for slightly over half of the total number of websites. Accommodations in Rwanda seem very much under-represented online: of the 72 hotels and accommodations that could be traced, only 12 have a website.

5.1 Online tourism representation

Figure 2 indicates that the vast majority of tourism service suppliers use foreign server companies in a technologically advanced country to hosts its website. Most servers that are used are located in the US, Europe or South Africa. Only a very small proportion of websites in Uganda and Mozambique is hosted by domestic servers. An obvious reason for this finding could be that in this way African online firms cope with the limited ICT infrastructure, the regular power blackouts, and a population that has limited computer skills.

A similar strategy is found in respect of the administrative dimension of the ICT infrastructure. Availability of Internet service providers, price differences between Top Level Domain (TLD) extensions, or long procedures may influence firms in their choice for a domain name. For this reason generic TLDs may sometimes be preferred over country code TLDs (ccTLD). On the other hand, ccTLDs may also have some emotional appeal and may contribute to the overall image projection of the country, although they might prove to be more difficult to find on the web as consumers are potentially less familiar with these country codes. Figure 3 shows that half of the online tourism firms in Uganda and Rwanda use their own ccTLD. The other half resorts mainly to the dot-com

TLD. Mozambican tourism service suppliers hardly use the ccTLD. Around half of them use the dot-com TLD, where the remaining firms can be found with the ".za" extension, which basically reflects the high number of South African tourism entrepreneurs that invest in Mozambique.

- INSERT FIGURE 2 ABOUT HERE -

- INSERT FIGURE 3 ABOUT HERE -

5.2 Tourism website networks

Tourism websites can be divided into two categories: suppliers of tourism services, such as accommodation, gorilla tracking, or scuba diving, and intermediaries, such as local tour operators and booking agents, and portals. Tourism portals tend to be viewed as the most powerful websites, because they serve as information hubs in website networks, thereby influencing many users. Portals guide potential customers via hyperlinks to intermediaries and primary suppliers. The information provided on the portal as well as processed on the websites linked to the portal, in combination contribute importantly to exerting an influence on the formation of projected image of a particular country as tourism destination.

Figure 4 shows the tourism portals per country. They are presented in a hierarchy that is based on the number of hyperlinks to local tourism service suppliers: the higher the number of hyperlinks, the higher the position in the hierarchy. The chart in Figure 4

depicts the proportion of hyperlinks per portal in the total number of hyperlinks of all portals combined.

- INSERT FIGURE 4 ABOUT HERE -

In Rwanda, six tourism portals were discovered. The largest is the *Bwana Mitch's Safari Portal* (http://www.safari-portal.de/RW.e.html), owned by a German entrepreneur. The Safari portal accounts for about 40 per cent of total Rwandan tourism portal hyperlinks. The second largest portal is that of the *National Museum of Rwanda* (http://www.museum.gov.rw/). The museum portal is one of the two tourism portals that are owned by Rwandan organizations. It offers many links to museums, genocide memorials and exhibitions in Rwanda.

Mozambique has seven tourism portals, which are all owned by foreign organizations.[4] The three largest portals have a combined share of 70 per cent of the total number of hyperlinks from the tourism portals to Mozambican service suppliers. The portal *Off road and Sea* (http://www.ofroadandsea.com/) is the biggest and owned by a UK based entrepreneur. The owners of the other two portals *Northern Mozambique* (http://www.northern-mozambique.com/) and *Mozguide* (http://www.mozguide.com/index.asp) are based in the USA. The remaining four tourism portals are owned by organizations or entrepreneurs residing in South Africa.

Tourism opportunities in Uganda are presented by seven portals that are mostly owned by Ugandan organizations. The second largest portal is *VisitUganda*

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[4] Several Mozambican-owned tourism information websites were found, but since they did not offer hyperlinks to local service suppliers they could not be included in the analysis.

(http://www.visituganda.com/) that accounts for 15 per cent of all hyperlinks from tourism websites. The portal is operated by the Uganda Tourism Board that functions under the aegis of the Ugandan Ministry of Tourism. The two main Ugandan newspapers have their own tourism portal: *EnterUganda* (http://www.enteruganda.com/) and *MyUganda* http://www.myuganda.co.ug/). A significant finding is the foreign ownership of Uganda's largest portal, *TravelUganda*. This portal (http://www.traveluganda.co.ug/) accounts for over 60 per cent of all tourism portal hyperlinks. The owner is a South African tourism entrepreneur who resides in Europe. His firm offers Ugandan tourism service suppliers web space either under their own domain or, alternatively, under the domain of TravelUganda.co.ug. By using the cheaper and faster Internet access of Swiss internet service providers he can offer his web hosting services at a competitive price.

- INSERT FIGURE 5 ABOUT HERE -

Next to the identification of the main tourism websites, the data offers the opportunity to examine the domicile of the registrants of the websites, which can be considered the website owners. Figure 5 indicates that ownership of the vast majority of tourism websites in and representing the three African countries rests by foreign entrepreneurs or "boardrooms". Domestic ownership of tourism websites in Mozambique and Rwanda is limited to only a few percent, but increases to around 35 percent in the Uganda context. Currently, over 60 per cent of Mozambican tourism websites is presently owned by individuals and organizations residing in South Africa, while more than half of the Ugandan websites are owned by Europeans, mainly the owner of the TravelUganda portal. Europeans also seem to play a disproportionate role in the website ownership in

Rwanda, although for over half of the websites the researchers were unable to trace the data of registrants due to unavailability.

Both the information on the tourism Internet portal networks and on the domicile of the website owners seem to confirm, that the virtual 'real estate' of online tourism in the three African countries tends to be foreign owned. In Mozambique this situation basically reflects the high interest in Mozambique by South African tourism investors in view of the South African tourist market. In Uganda, the foreign involvement can largely be explained by one foreign web-hosting firm that offers local tourism service suppliers the opportunity of having an online exposure and dominates the national market. As a result, the "lenses" of image formation of three African national destinations seem to be substantially owned by foreign stakeholders.

5.3 Projected destination image

To reveal the destination image projected by the tourism websites in the three African countries that are subject of the present study a content analysis was carried out on the total sample of websites per country. The aggregate result of the study is shown in the three radar charts (Figures 6-8). The charts show a number of interesting findings:

(a) All three countries project particularly NATURE as the key attraction of the country. The category nature is built on words, such as 'forest', 'volcano', 'park', 'lake', 'falls', and 'ocean'.

(b) Both Rwanda and Uganda also strongly include FAUNA in their projected image. This category basically refers 'gorillas' and 'chimpanzees' of which colonies can be found in both countries, as well as to words such as 'safari', 'game', and 'bird'. In Mozambique FAUNA seems to be a less important attribute in the image projection, even though the country hosts rare wildlife (both terrestrial and marine). Perhaps this low emphasis on wildlife can be explained by the South African dominance in Mozambique's online tourism networks. Wildlife is ample available in South Africa itself, and South African tourists are particularly interested in the Mozambican coastline.

(c) In the Mozambican projection the category "sports" is relatively visible. It consists mainly of the words 'dive', 'scuba', and 'boat', and reflects the many diving opportunities on the Mozambican coast, whereas in Rwanda and Uganda sporting opportunities are undeveloped.

- INSERT FIGURE 6 ABOUT HERE -
- INSERT FIGURE 7 ABOUT HERE -
- INSERT FIGURE 8 ABOUT HERE -

(d) The category HOSPITALITY ('hotel', 'lodge', 'resort', 'bar', 'campsite') seems well presented in the projected image of all three countries. In contrast, ACCESS ('road'', 'drive', 'tour') and CITY LIFE (including mainly the names of the largest cities in the countries) are categories that seem to be less relevant in the projected images. Neither seems CULTURE (based on words such as 'museum', 'local', 'tradition', 'genocide') particularly important in the projected images of Mozambique and Uganda. In Rwanda

culture has more prominence. However, this result might be biased by the well-developed museum portal that is having a relatively large influence on the small sample of Rwandan websites.

6. Conclusions and discussion

This paper focuses on the issue of how African suppliers could leverage global virtual networks to expand their presence in the high value-added activities of branding and marketing. In respect of the structural dimension, we found a high reliance among indigenous suppliers on foreign server networks, general Top Level Domains, foreign web hosting services, and foreign tourism investors. On the one hand, this reflects the competitive vulnerability of local African tourism firms who have to cope with the digital divide Access to advanced ICT networks and better skills to manage computer software may put foreign tourism entrepreneurs who are active in African destinations, in a relatively advantageous position for functional upgrading in the tourism global value chain. In this way, the "lenses" that make destination images visible to the international markets are largely foreign owned, a situation which carries the risk of reinforcing stereotypical images of Africa. On the other hand, resorting to effective foreign web hosting organizations, while maintaining control over the website content, may reduce such as risk. Hiring foreign organizations seems a pragmatic strategy for indigenous tourism firms to circumvent the limitations of the present domestic ICT infrastructure.

In respect of the content dimension of the tourism websites, the main findings suggest that the projected images bridge the destination image gaps, albeit only weakly. First, as regards the *strategy gap* (Figure 1) there is a risk that the projected image is not structurally linked to the identity of those places where the services of foreign ICT providers are hired. In line with the international perceptions, the focus of the websites is primarily on nature and fauna, but their cultural and heritage attributes are largely ignored, or worse, presented in a negative light. Second, those who make the service delivery promise (foreign ICT providers and channel captains) tend to differ from the firms that deliver the service, and therefor may contribute to widening the *delivery and supply gap*. Furthermore, it may trigger considerable discrepancies between tourist expectations and experiences, thereby harming a destination's reputation. Third, with respect to the *demands specifications gap*, the projected image on the websites upholds international hegemonic media perceptions. None of the African tourism websites that were investigated appears to undertake some initiative to either bend or contradict stereotype images so as to improve the image of Africa's culture, people and economic and political situation. A possible explanation for this finding could be that the indigenous tourism suppliers themselves hold a stereotype image of what foreign tourists would like to see. Thereby, they might ignore a growing segment of tourists who are in search of 'local content' that enhances their holiday experience, and who are sensitive to the costs and benefits that tourism bestows on local communities. Catering to this demand in low cultural contexts requires tourism service suppliers to differentiate their products much more. For instance, value could be added to ordinary hospitality issues (room, bed) when linked to local customs in order to create an African experience. Adding local content in respect of high culture contexts involves the provision of online

information about, and references to, for example, national novelists, musicians, artists, architects, and fashion designers. Currently, the tourism websites are almost completely silent on the cultural attributes of their destinations. Hence, the limited available information (solely focusing on nature), that Western consumers can get on African tourism websites may be seen as a gap so wide and ill-equipped to be perceived as adding value. Consequently, the former are likely to mix and match their demands specifications through autonomous agents.

Functional upgrading in the global value chain of tourism requires African tourist destinations identifying their true position in the market through the systematic and critical analysis of the image they project upon an international audience. Such an exercise should give destination management organizations appropriate insights in their strategic degrees of freedom to focus their efforts on one of three or a combination of aforementioned destination strategies, namely:

(1) Enhancing reputation directly with end consumers;

(2) Shortening the value chain through 'direct selling', thereby bypassing established intermediaries;

(3) Destination branding which leverages the power of network-association to promote a specific African country, region or city as tourism destination.

No single tourism destination can afford to stand alone, because each is locked into a complex global value chain network of relationships. Therefore to be effective, the

destination management organizations (DMOs) of Rwanda en Uganda could contemplate how to achieve a collaborative advantage. Our research results indicate that in both countries the gorillas are seen as their main attraction feature. Therefore, the gorilla may be interpreted as a 'crown jewel' and anchor for the fostering of the tourism image formation process. Within the framework of the tourism value chain network of relationships, the gorilla as symbol would serve the function of 'network picture' around which to mobilize relevant actors to develop a jointly-supported destination brand identity, which incorporates relevant local cultural-natural characteristics. The gorillas habitat is a sufficiently distinctive symbolic feature to differentiate (Aaker and Joachimsthaler, 2000) Rwanda and Uganda as tourism destination from competing destinations and persuade tourists to visit these instead of other destinations.

Against the backdrop of branding within a network approach, it is essential that the DMOs constantly assess their strategic opportunities along two main strands. Firstly, they need to identify strategies that enable DMOs to bridge the digital divide including the support of foreign servers and foreign web hosting organizations. However, secondly, the reliance on foreign organizations is likely to lead to new dependencies in functional upgrading strategies of destination branding and marketing. Consequently, DMOs must be vigilant and monitor constantly their business relationships within the tourism value chain and the local networks of suppliers (e.g. hoteliers), customers and other business partners (e.g. airlines) on four brand levels: the brand as a product, the brand as a symbol, the brand as an organisation and the brand as a personality. Modern tourists want to experience 'a sense of place' when visiting a destination. Hence, experiential and

symbolic benefits play as important a role as functional benefits in a destination brand's identity. For purposes of bringing a sense of harmony in the 'network picture', Rwandan , Ugandan, and Mozambican-based DMOs could develop the capabilities to deal with the effects of the dynamic tourism destination image formation process and its ensuing triadic tensions between place identity, its projection and the consumers' perceived image.

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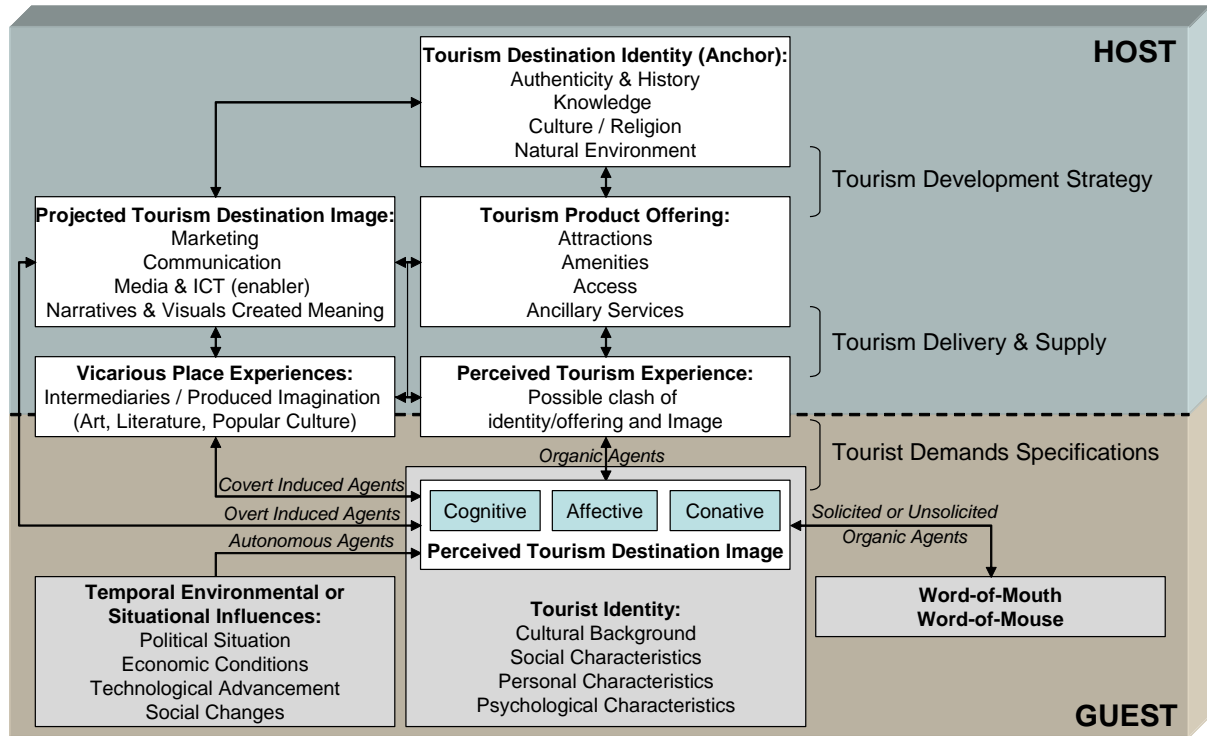Figure 1: The 3-gap Tourism Destination Image Formation Model. (Source: Govers & Go, 2004)

Table 1 Dataset of tourism websites in three African countries

	RWANDA		UGANDA		MOZAMBIQUE	
	Dataset	Content analysis	Dataset	Content analysis	Dataset	Content analysis
Primary suppliers	28	12	172	138	141	116
Intermediaries	16	15	66	57	6	5
Portals	6	2	7	7	7	6
Total	**50**	29	**245**	202	**154**	127

Figure 2 Server location of tourism websites of three African countries*
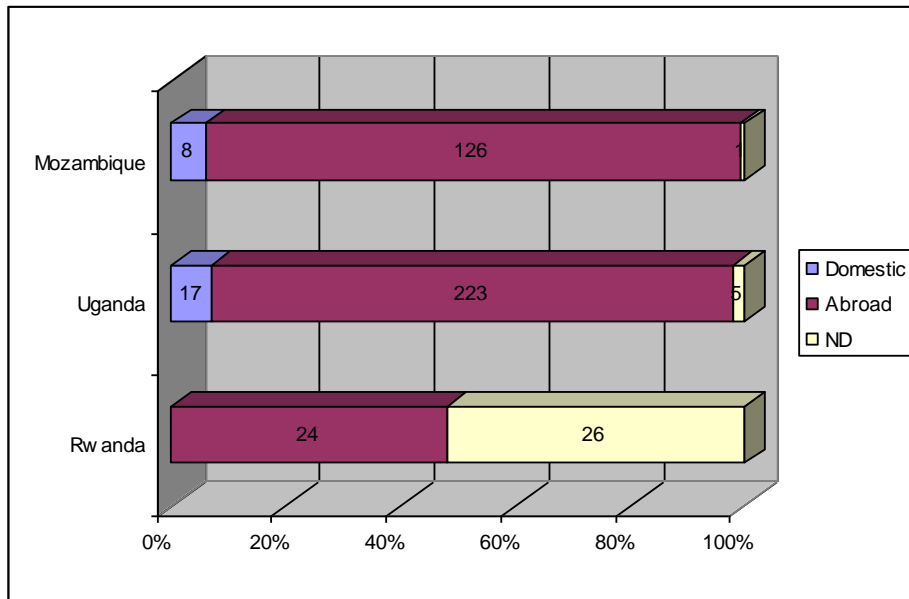
* Analyses of Mozambique is based on only 135 service suppliers

Figure 3 Domain names of tourism websites of three African countries
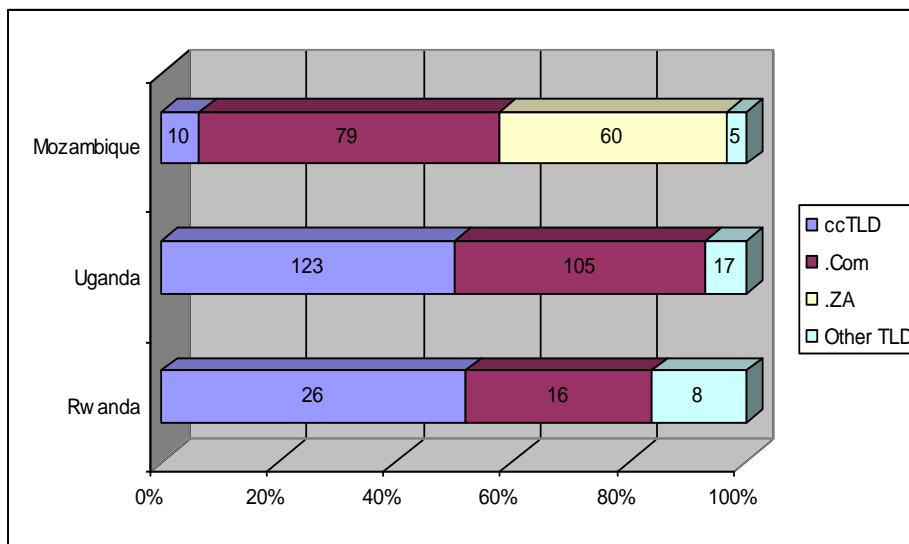
Figure 4 Hierarchy of tourism portals in three African countries, based on the number of hyperlinks to tourism service suppliers
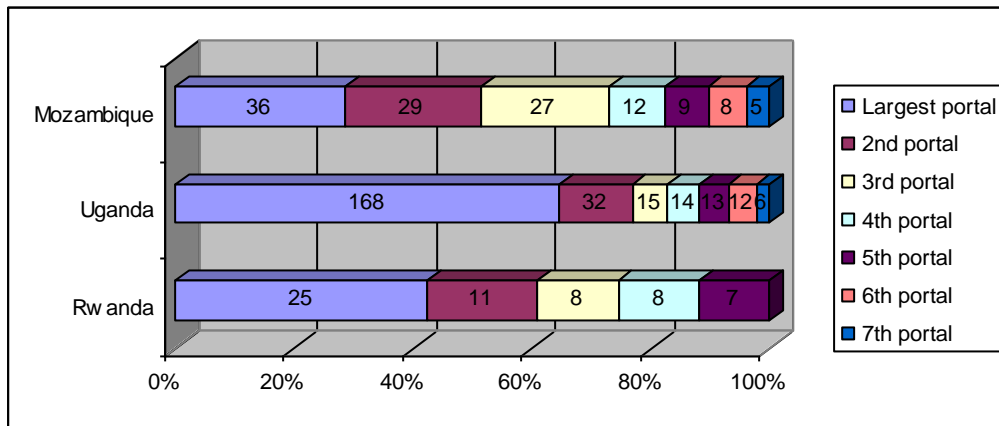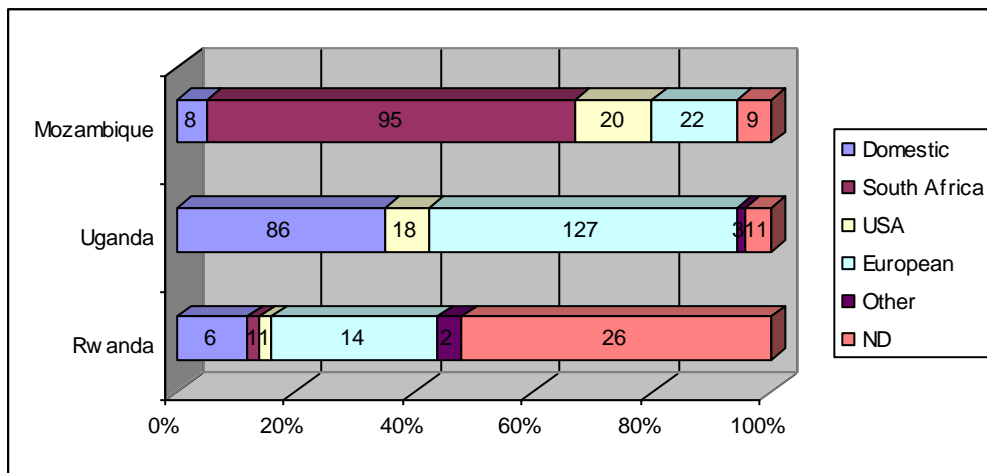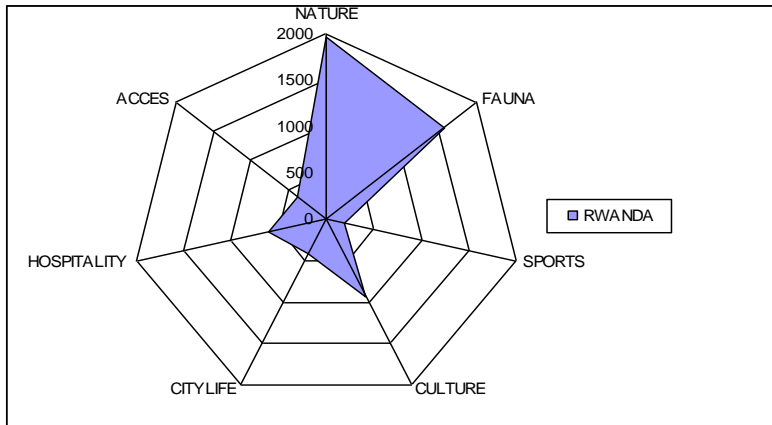

Figure 5 Domicile of tourism website owners in three African countries*
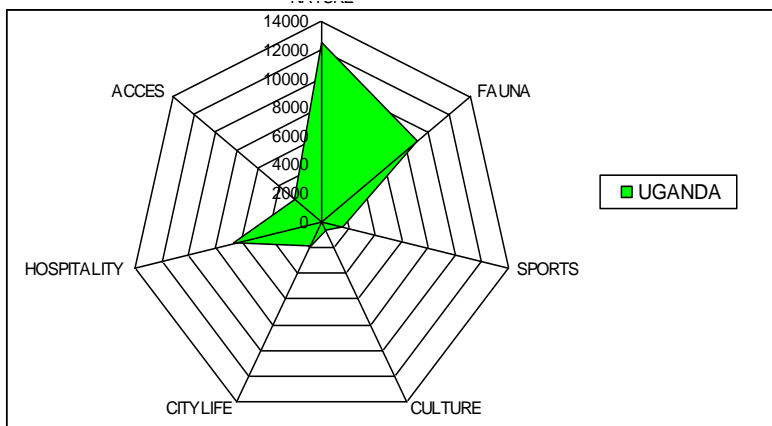Number and share in the total number of websites in the sample

* Calculations are based on the domicile of the website registrant

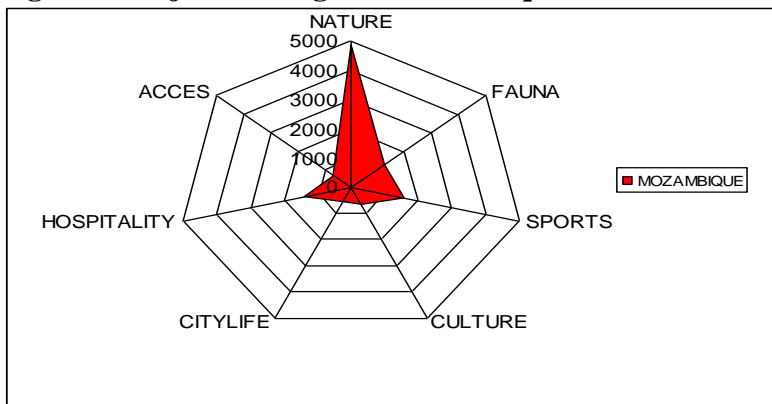**Figure 6 Projected image of Rwanda as tourism destination**

Source: Content analysis of 29 tourism websites of Rwanda

Figure 7 Projected image of Uganda as tourism destination

Source: Content analysis of 202 tourism websites of Uganda

Figure 8 Projected image of Mozambique as tourism destination

Source: Content analysis of 127 tourism websites of Mozambique

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