



**Enhancing Rwanda's Attractiveness for Large-Scale Touring Concerts: Opportunities,
Challenges, and Strategic Interventions**

by

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Abstract

This study examines Rwanda's potential to position itself as a destination for large-scale touring concerts, thereby contributing to the country's tourism, economic, and cultural objectives. Drawing on event hosting literature, foreign direct investment (FDI) theory, Porter's Diamond, and the resource-based view (RBV), the research explores the drivers and constraints influencing Rwanda's attractiveness to international promoters. Data was collected through semi-structured interviews with key stakeholders - government officials, industry experts, and event organisers - and analysed thematically.

The findings highlight Rwanda's recent strides in infrastructure development, including modern venues like BK Arena, as well as branding efforts by the Rwanda Convention Bureau. Nonetheless, several barriers persist: limited private-sector capacity, cultural misperceptions of Africa, and high fixed costs for major global tours.

To address these challenges, the study proposes interventions focused on public-private collaboration, sponsorship frameworks, and integrating local cultural assets to enhance Rwanda's value proposition. Additionally, developing human capital in concert production and management is identified as a critical success factor for meeting the technical demands of global touring acts. Overall, the research underscores the potential of concerts to diversify Rwanda's tourism and elevate its international profile.

Keywords

Concert Tourism, Event Hosting, Rwanda, Foreign Direct Investment, Resource-Based View, Large-Scale Concerts, Tourism Infrastructure, Public-Private Partnership, Stakeholder Collaboration, Music Festivals, Concert Tours, Music Touring, Rwanda

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1. INTRODUCTION

1.1. Background

The potential for tourism to drive economic development in Africa has been widely acknowledged, notably at the World Investment Conference in 2005 (UNTD, 2005). Africa recorded 58 million international tourist arrivals in 2016, which was an 8% increase from 2015 (UNWTO, 2017). Rwanda's tourist arrivals grew by 7% annually between 2012 and 2015 (UNWTO, 2017), and Rwanda's Ministry of Trade and Industry anticipated tourism-related projects to generate approximately USD 627 million from 2,219,000 international visitors - underscoring the sector's critical economic role (MINICOM, 2009). Concurrently, Rwanda's traditional reliance on agriculture has given way to a burgeoning service sector (Uwitonze & Heshmati, 2016). By 2011, tourism had become Rwanda's principal source of export earnings, constituting 63% of the total export revenue (UNCTAD, 2014).

Competition to attract tourists and foreign direct investment (FDI) extends beyond government policies and is increasingly shaped by the cultural branding of nations (Baiocchi et al., 2024). A country's cultural identity and its strategic branding efforts are critical to positioning itself within the global tourism market (Anholt, 2006). Music, as one of the most consumed art forms worldwide (Sound Diplomacy & Procolombia, 2018), is being leveraged by governments to stimulate employment, tourism, and economic growth (Baiocchi et al., 2024). In this regard, music festivals and large-scale concerts present a significant opportunity for Rwanda to enhance its economic standing and global reputation (Odunga et al., 2019). Internationally, concerts have transformed from entertainment ventures into key drivers of economic activity, influenced by factors such as ticket pricing, digital trends, and new event formats (Holt, 2010).

The Rwanda Convention Bureau (RCB), established in 2014, has played a strategic role in attracting events that increase international visitation, ranging from business conferences to global sporting events such as the UCI World Road Cycling Championships (RCB, 2023). While Rwanda has consistently pursued initiatives to develop its tourism infrastructure—including the construction of modern hotels, cultural venues, and convention centres—it has yet to fully capitalise on the potential of large-scale concerts and music festivals (RDB, 2019). Limited government prioritization, alongside factors such as corruption, political instability, and inadequate strategic planning, has constrained the effectiveness of arts-based tourism initiatives in other nations (Novelli et al., 2012; Christie et al., 2014; Okello & Novelli, 2014). The Rwandan Government's prioritisation of the sector may offer an opportunity to buck this trend.

The existing literature highlights the role of music festivals in attracting FDI while also identifying barriers to tourism development. However, limited research has been conducted on Rwanda's ability to position itself as a prime destination for large-scale concerts. This study aims to evaluate Rwanda's attractiveness to global concert promoters and to develop strategic recommendations that could enhance its appeal to international concert organisers.

1.2. Research Problem

In August 2024, Rwanda launched its second National Strategy for Transformation (NST2), outlining an ambition to double tourism revenues from \$620 million to \$1.1 billion by 2029 (NST2, 2024). A key mechanism for achieving this goal involves attracting high-profile consumer-driven events,

including major sports and entertainment activities. However, global touring artists and their management teams remain hesitant to include African destinations such as Rwanda on their schedules. This reluctance is shaped by the economics of global touring, which prioritise large, fixed-guarantee fees, as well as by the structural dynamics of the live music industry (Pastukhov, 2019). This situation poses a challenge for Rwanda, which has invested heavily in infrastructure, including the multipurpose BK Arena and the renovated Amahoro Stadium, where the ability to host large scale concerts has been integral to the design (Munyeri & Wanjiku, 2023).

Efforts such as Global Citizen's 'Move Afrika' initiative have attempted to establish a touring circuit in Africa, leading to Rwanda hosting concerts by Kendrick Lamar (2023) and John Legend (2025) at BK Arena (Global Citizen, 2025). Despite these milestones, Rwanda has attracted few further engagements from major international touring artists beyond Africa. Meanwhile, South Africa remains the only African country regularly included in global touring circuits. Accordingly, this study seeks to understand the factors influencing Rwanda's attractiveness as a concert destination and to propose strategic interventions aimed at improving its positioning in the international live music market.

1.3. Gap Analysis

Existing literature extensively explores how large-scale music events contribute to economic growth, infrastructure development, job creation, and foreign direct investment (FDI) in host countries (Brown & Knox, 2017; Davies, 2023; Cai, 2024; Das, 2020; Tegegne, 2024). Studies often emphasise the outcomes and impacts after events have occurred rather than analysing the determinants that attract global touring concerts in the first place. While scholars commonly discuss general determinants of country attractiveness, such as political stability, infrastructure, and FDI incentives (Khan, 2007; Tindan, 2023; Ucar & Tuncay, 2022), there is a notable scarcity of specific research on how developing countries can strategically position themselves within the global live music industry.

Developed nations, particularly the USA and several European countries, have strategically branded themselves as prime destinations for live music performances, successfully leveraging this to enhance tourism and economic growth. There has been little analysis of whether developing markets, including East Africa, have the capacity and strategic management to do the same (Joffe & Mukanga-Majachani, 2023). This gap is particularly significant given the growing importance of emerging markets and the potential economic benefits from live entertainment.

1.4. Research Question

This study aims to answer the question: "How attractive is Rwanda as a destination for large-scale touring concerts, and what are the opportunities, challenges, and strategic interventions required to enhance its appeal to international event organisers?"

1.5. Research Objectives

- To assess the key factors influencing Rwanda's ability to host large-scale music concerts.
- To evaluate the opportunities and challenges facing Rwanda's event industry in relation to live music events.
- To propose strategic recommendations for enhancing Rwanda's attractiveness to international concert promoters.

1.6. Significance of the Study

This study contributes to Rwanda's ambition of increasing annual tourism revenues from \$620 million to \$1.1 billion by 2029 (NST2, 2024). Live music concerts are memorable social events that provide unique musical experiences, and despite the availability of recorded music on digital devices, people are still motivated to attend live concerts (Swarbrick et al., 2021). However, the music tourism business across various countries is faced with challenges, such as limited understanding of industry-related policy development, complicated funding procedures, and lack of coordination between multiple stakeholders (Ord & Behr, 2019). Nevertheless, large-scale musical concerts do not only benefit a country in terms of revenue generation but are also a contributing factor towards increasing the appeal of the country itself (Kruger & Saayman, 2017). Adding to this, du Preez and Kruger (2017) argue that music is the aspect of the African culture which the continent has not fully utilised to its potential for creating destination value.

This paper proposes strategic interventions to overcome persistent challenges—such as misconceptions among global promoters, infrastructure utilisation, and financial ecosystem development—thus offering actionable insights for policymakers and industry stakeholders. By providing concrete, empirically supported recommendations, this study will facilitate Rwanda's positioning within the global concert industry, reinforcing its overall attractiveness for international visitors and investors, and hence contributing to its broader economic vision.

1.7. Structure of the Study

This research is structured into six chapters. The first chapter introduces the study's background, research problem, objectives, and significance. Chapter Two reviews relevant literature, drawing insights from global studies on large-scale concert tourism and event-hosting strategies. Chapter Three details the research methodology employed, including data collection and analysis techniques. Chapter Four presents the results, highlighting emerging themes from stakeholder interviews. Chapter Five discusses the findings in relation to existing literature, and the final chapter concludes with strategic recommendations based on the study's insights.

1.8. Theoretical Approach

This study integrates Porter's Diamond Model and the resource-based view (RBV). Porter's model identifies external competitive factors, such as industry structures and government policies, while RBV emphasises internal resource-based capabilities, including talent, venues, and cultural assets. Combining these frameworks enables an in-depth assessment of both Rwanda's external market conditions and its distinctive internal resources, providing a theoretical foundation for the research and informing strategic recommendations to enhance Rwanda's attractiveness to international concert promoters.

2. LITERATURE REVIEW

This section critically reviews the existing literature on the attractiveness of countries for large-scale event hosting, with the inclusion of literature discussing live music concerts as drivers of economic and cultural development. While extensive research has examined the role of political stability, and infrastructure in determining country attractiveness in relation to foreign direct investment (FDI) (Das, 2020; Tindan, 2023), limited attention has been given to the specific dynamics of attractiveness for large-scale touring concerts. Overall, this review synthesises insights from tourism, international business, and event management literature to establish a conceptual foundation for evaluating Rwanda's potential as a destination for global touring concerts.

2.1. Concert Tourism and Large-scale Event Hosting

2.1.1. Definitions of Concert Tourism and Events

Events and festivals have increasingly become pivotal in the strategic efforts of cities and nations to attract visitors and stimulate economic investment, particularly within the tourism sector (Getz, 2008). Travelers attending such events do not merely participate in the scheduled activities; they also explore new destinations, contributing to longer stays and increased expenditure, with a preference for group travel. This consumer behaviour positions event tourism as a lucrative segment within the broader tourism industry (Hernández-Mogollón et al., 2014).

Music has become an integral element of social life, embedded within a wide range of cultural and communal gatherings (DeNora, 2000; Schäfer et al., 2013). While historically associated with traditional forms such as opera and concert hall performances, live music experiences have evolved significantly, expanding beyond passive listening to encompass diverse and immersive formats (Wald-Fuhrmann et al., 2021). Within this context, Bowen and Daniels (2005) define music festivals as events where music serves as the central component, supplemented by various complementary activities designed to enhance engagement and reinforce the festival's thematic connection to music.

2.1.2. Impact of Large-Scale Concerts

Despite the rise of digital music streaming and increasing sales of recorded music, live music performances continue to retain their significance in the global music industry (Brown & Knox, 2017). Scholars have linked live music events to broader economic development, particularly within the tourism sector. Andersson and Getz (2008) examined the role of festivals in tourism marketing, highlighting their contribution to both cultural and socioeconomic development on a global scale.

Recent scholarship emphasises music's role in shaping cultural identity and facilitating international engagement. Dunkel and Schiller (2022) explored the integration of popular music into political discourse, illustrating its influence on public sentiment and policymaking. Similarly, Davies (2023) examined music events as catalysts within the international political economy, noting their potential to attract foreign direct investment (FDI). In a related analysis, Kiel (2020) investigated the 2019 Eurovision Song Contest, demonstrating how large-scale music events serve as mechanisms for strengthening international relations. Additionally, Pasler (2021) analysed the role of the Dakar Music Festival in African diplomacy, underscoring its function in fostering cross-cultural exchange. Extending these discussions, Zlotnyk et al. (2024) highlighted the multifaceted role of music festivals in bridging cultural divides and promoting peaceful international relations.

Beyond their sociocultural impact, large-scale concerts have become an increasingly vital revenue stream for artists, particularly in an era of widespread music streaming (Naveed, Watanabe & Neittaanmäki, 2017). Additionally, with artists and audiences alike demonstrating a growing willingness to travel for live performances, the economic implications of concerts have expanded significantly (Cai, 2024). Cai further emphasised the commercial dimension of live music events, noting that ticket sales, often priced at premium levels, contribute substantially to national GDP. Complementing this perspective, Umam and Manurung (2022) identified merchandise sales as an additional revenue stream for large-scale concerts, further reinforcing their economic impact. Furthermore, Cornwell and Kwon (2019) highlighted the integral role of sponsorship in concert financing, not only as a marketing tool but also as a key source of financial support for artists, thereby contributing to broader revenue generation within the music industry.

Despite the widespread shift towards digitalization and music streaming platforms such as Spotify, live music concerts continue to hold significant cultural and economic value (Holt, 2010). The sustained demand for in-person performances, particularly within the K-pop industry, illustrates this phenomenon. The international appeal of South Korean artists, such as BTS and BLACKPINK, has been a driving force in the country's music export strategy. This has not only supported the global expansion of K-pop (aligned with its ambitions for promoting cross-cultural exchange) but also contributed to South Korea's broader economic positioning (Kong, 2016; Boman, 2019; Oh, 2013). The economic impact of large-scale concerts in South Korea has been felt in the hospitality and tourism sectors, where major events featuring these artists have contributed to national revenue generation (Chen, 2023; Boman, 2019). Similarly, Taylor Swift's *Eras Tour* from 2023 illustrates the economic power of concert tours, with tens of thousands of attendees per concert boosting tourism and hospitality industries in host markets (Hoff et al., 2025; Cai, 2024).

Cai (2024) additionally notes that ticket sales, often at premium prices, significantly contribute to revenues from major events. Secondary revenue streams, such as merchandise sales, further contribute to economic returns, albeit on a relatively smaller scale (Umam & Manurung, 2022). However, quantifying the full economic impact of these concerts remains complex. Saayman and Saayman (2006) note that variations in consumer spending patterns across different locations complicate efforts to assess the precise financial benefits of large-scale events. This variability underscores the challenges in evaluating the broader economic contribution of the concert industry.

These cases illustrate the critical role that live music performances continue to play in contemporary economies. While digital platforms have reshaped the music industry, large-scale concerts remain central to revenue generation, tourism development, and cultural diplomacy. This reinforces the importance of assessing a country's potential to attract such events, particularly in the context of developing markets seeking to enhance their global entertainment appeal.

2.1.3. Large-Scale Musical Concerts and Africa

Getz (2008) identifies large-scale music events as a significant contributor to tourism development across Africa. Since the expansion of South Africa's event marketing sector after 1994, there has been considerable growth in demand for large-scale music events (Tassiopoulos, 2000). This expansion has coincided with an increase in the popularity of pop-rock and jazz music, with audiences increasingly willing to travel to attend live performances (Manners, 2012). Examining the economic implications of such events, Saayman and Saayman (2006) found that geographic location influences both the

financial impact of live music performances and the spending behaviour of attendees. Their study concluded that infrastructure plays a pivotal role in the success of these events, which in turn affects the broader economic growth of the host country.

Despite the recognised economic potential of large-scale concerts, limited research has been conducted on their role in enhancing country attractiveness. Manners et al. (2015) note that live music performances are often assessed through technical metrics rather than their potential as economic drivers in developing nations. The only comprehensive study in this area was conducted by Lade and Jackson (2004), who analysed the critical factors contributing to the success of Australian music festivals in attracting foreign investors and visitors. In contrast, research on large-scale events in Africa has primarily focused on alternative cultural and tourism-related events such as wine festivals, guesthouse openings, and art exhibitions as indicators of economic success (Marais, 2009; Appel, 2011; Erasmus, 2011). This gap in literature underscores the need for further exploration of the role of large-scale concerts in driving foreign direct investment and tourism development in African economies.

2.2. Country Attractiveness

The concept of country attractiveness within international business literature serves as a benchmark for assessing a nation's competitive positioning in relation to its market potential, encompassing its industrial landscape and foreign direct investment (FDI) prospects (Lee, 2016). It is commonly defined as the extent to which a country is preferred over others based on a set of criteria that may include both tangible and intangible attributes: in a competitive global environment where nations vie for scarce resources, country attractiveness functions as a strategic asset that can foster sustainable competitive advantage (Porter, 1990). Tindan (2023) underscores the significance of country attractiveness in attracting investment, which in turn strengthens a nation's socioeconomic standing. Similarly, Lee (2016) suggests that a country's perceived attractiveness can play a pivotal role in shaping its global image, particularly in the context of large-scale international events.

Tindan (2023) conceptualises country attractiveness as an interdisciplinary construct, shaped by the dynamic interplay of financial stability, economic development, legal and regulatory frameworks, and political stability. The author further delineates four principal attributes underpinning country attractiveness: (1) openness, which facilitates the unrestricted movement of human capital and economic resources; (2) innovation, which pertains to the promotion of scientific and technological advancements among businesses and citizens; (3) efficiency, which ensures the effective functioning of capital, product, and labour markets; and (4) endowment, which encompasses a nation's resource base, including natural assets, labour force, and capital reserves.

The increasing relevance of country attractiveness as a determinant of FDI inflows has resulted in growing scholarly and policy interest in the subject. Research into the factors driving decisions by international investors has relevance to the events sectors, as event promoters effectively make short term, ephemeral investments in the market.

Understanding the key determinants of a country's attractiveness is crucial in assessing its potential to draw investment, tourism, and immigration. These factors collectively shape a nation's ability to foster economic growth and enhance its competitive standing in the global market.

2.2.1. Porter's Diamond Model

Porter (1990) developed the Diamond Model as a framework for analysing country-specific advantages that contribute to competitive positioning within particular industries. The model identifies four interrelated dimensions that collectively shape a nation's competitiveness: factor conditions, demand conditions, related and supporting industries, and firm/country strategy. Each of these elements offers insight into the macroeconomic and industry-level factors that influence Rwanda's potential as a host for large-scale concerts.

Several empirical studies demonstrate the continued relevance of Porter's model. Bakan and Doğan (2012) applied it to assess the competitiveness of basic industries in Kahramanmaraş, Turkey, concluding that government policies, industry linkages, and demand-side factors impacted competitive positioning. Similarly, Vlados (2019) argued that while Porter's model remains applicable, its explanatory power can be enhanced by integrating broader socioeconomic dimensions, leading to a more dynamic 'competitiveness web' framework. In the context of tourism, Bouchra and Hassan (2023) employed the model to evaluate the UAE's tourism cluster, demonstrating that strategic government interventions—rather than natural endowments alone—underpinned its competitive success.

Applying Porter's Diamond Model to Rwanda's live events sector enables an evaluation of both its competitive strengths and structural limitations in hosting large-scale concerts. The model facilitates an analysis of industry support mechanisms (e.g., local event organisers, suppliers, regulatory frameworks), infrastructure quality (venues, logistics, and transport), and domestic demand for concerts. These factors collectively determine Rwanda's attractiveness as a concert destination and help identify strategic interventions required to enhance its positioning in the global live entertainment market.

2.2.2. Foreign Direct Investment (FDI)

The attractiveness of a country for foreign direct investment (FDI) is recognised as a fundamental driver of economic development. Traditionally, scholars have analysed the determinants of FDI by focusing on factors such as market size, labour costs, exchange rates, and infrastructure (Grosse & Trevino, 1996). Over time, particularly after the 1990s, institutional frameworks have gained prominence as additional determinants influencing FDI flows (Globerman & Shapiro, 2003).

Jackson and Markowski (1996) argue that FDI attractiveness is shaped by mobility and modality factors, which determine investors' preference for direct investment over alternative options such as portfolio investment or domestic firm expansion. Asongu et al. (2018) further highlight that while market size, infrastructure availability, and trade openness impact FDI in BRICS and MINT economies, factors such as natural resources and institutional quality play a less significant role. Similarly, Das (2020) found that the determinants of inward FDI vary considerably across advanced, emerging-market, developing, and transition economies, indicating that the drivers of investment are context-dependent.

The case of East Africa underscores the nuanced nature of these determinants. Tegegne (2024) argues that market size and exchange rate stability positively influence FDI inflows in highly indebted Eastern African countries, whereas labour force characteristics and external debt exhibit mixed effects. In South Africa, Snyman and Saayman (2009) identify factors such as perception, infrastructure, government policy, economic stability, competitiveness, and natural endowments as

key considerations shaping FDI flows, particularly in the tourism sector. Across Sub-Saharan Africa, Bartels et al. (2009) emphasise that transaction cost-reducing information on industries and markets, political economy considerations, and access to utility services are pivotal, whereas labour and production input costs have limited impact.

Bartels et al. (2014) further demonstrate that by 2010, production inputs and political-economic stability had become the most critical factors for attracting FDI in Sub-Saharan Africa, reinforcing the importance of policy predictability and investment climate. The role of fiscal incentives has also been explored, with Appiah-Kubi et al. (2021) finding that lower corporate tax rates and extended tax holidays enhance FDI inflows in African economies, while tax concessions appear to have negligible effects. Meanwhile, Utesch-Xiong and Kambhampati (2021) provide evidence that weaker institutional frameworks, combined with superior infrastructure quality, tend to attract Chinese FDI to African nations, particularly those that are resource-rich and have relatively higher income levels.

These insights collectively highlight the complex interplay between economic, institutional, and policy-related factors in shaping a country's attractiveness for foreign direct investment. While traditional determinants such as market size and infrastructure remain significant, emerging trends emphasise the growing importance of political stability, regulatory frameworks, and strategic fiscal policies in fostering a conducive investment environment.

2.2.3. Political Stability

Political stability is regarded as a critical factor in determining a country's attractiveness to investors and visitors. Many scholars contend that democratic nations tend to draw higher levels of foreign direct investment (FDI) and tourism due to their predictable legal frameworks and institutional stability (Khan, 2007; Tindan, 2023). However, this perspective is challenged by Hayakawa et al. (2013), who argue that authoritarian and communist governments can also establish structured policies that effectively support investors. The authors emphasise that ensuring political stability is essential for sustaining investor confidence and preventing disruptions that could deter foreign visitors.

Sub-Saharan Africa presents a complex landscape regarding political stability and investment attractiveness. Several nations in the region continue to experience political unrest, making them less appealing to foreign investors (Tindan, 2023). Naude and Krugell (2007) assert that political stability plays a more decisive role in determining the attractiveness of African countries than geographical factors. Aregbesola (2018) contends that weak political institutions and governance structures hinder the region's investment potential. In support of this argument, Adeola et al. (2020) find a strong positive correlation between political stability, economic growth, and tourism development in Africa, emphasising that stability is a prerequisite for fostering a thriving investment and tourism ecosystem.

This discussion underscores the nuanced role of political stability in shaping country attractiveness, particularly in regions where governance structures and institutional robustness vary significantly. While democratic governance is often associated with higher investment levels, alternative political systems with well-defined investor protections can also attract foreign capital. For African nations aiming to enhance their investment and tourism appeal, ensuring a stable and predictable political environment remains a fundamental priority.

2.2.4. Infrastructure Facilities

Infrastructure is a fundamental determinant of a country's attractiveness for foreign investment and international events. Vasiukov (2020) conducted a comparative analysis of developed and developing nations and found that while developing countries offer a wage advantage, the superior labour quality and infrastructure of developed economies render them more attractive for investment and visitation. Similarly, Jahan (2020) highlights that infrastructure is a critical factor in the competitiveness of developing nations. However, this view is contested by Onyeiwu and Shrestha (2004), who argue that infrastructure does not play a decisive role in shaping a country's attractiveness.

Empirical studies provide nuanced perspectives on this issue. Korez-Vide et al. (2014) analyse German and Austrian firms investing in Brazil and identify industry specialisation and robust physical infrastructure as key determinants of foreign direct investment (FDI) location choices. Ucar and Tuncay (2022) reinforce this argument, asserting that infrastructure development, alongside stable exchange rates, enhances the attractiveness of developing countries. Similarly, Ekeke (2020) examines Nigeria's tourism sector and concludes that inadequate infrastructure creates competitive disadvantages that limit the country's ability to attract foreign visitors and investors.

Within the African context, infrastructure emerges as a particularly complex variable. Asiedu (2001) highlights that Africa's determinants of country attractiveness differ from those in non-African economies, with infrastructure development and higher returns on capital serving as critical factors for attracting FDI outside of Africa. Cleeve (2008) supports this, finding that infrastructure improvements are among the most significant factors in increasing foreign investment in Sub-Saharan Africa. Maboa and Ncanywa (2020) echo this perspective, emphasising the long-term importance of infrastructure in shaping country attractiveness in South Africa.

In relation to event tourism, Handyastuti et al. (2023) conducted a systematic review of destination selection criteria and concluded that infrastructure, accessibility, and accommodation are fundamental considerations for international event organisers. Adelakun and Ogujiuba (2023) further contend that infrastructure gaps continue to hinder Africa's broader attractiveness for foreign investment and large-scale events. These findings suggest that while infrastructure alone may not dictate a country's ability to attract investors and tourists, its quality and availability play a significant role in fostering a competitive and desirable environment for international engagement.

2.3. Resource-Based View (RBV)

While Porter's model primarily focuses on external industry and market factors, the resource-based view (RBV) provides a complementary perspective by emphasising internal resources as sources of competitive advantage (Madhani, 2010). Various studies have contributed to the literature on the development of RBV, including Barney (1991) and Peteraf (1993). Originally developed within strategic management research, RBV has since been applied to tourism and investment attraction studies to evaluate how nations leverage unique assets to compete for visitors and foreign direct investment (FDI).

Empirical research highlights the role of internal capabilities in shaping country attractiveness. Alonso and Kok (2018) examined how Western Australia leveraged knowledge synergies, education, and research and development (R&D) to enhance its international appeal, focusing on industry resources and dynamic capabilities. Similarly, Alonso (2017) integrated RBV into an analysis of Uruguay's

tourism sector, finding that strategic consolidation of international markets and expanded offerings could counteract structural constraints such as weak airline connectivity and reliance on neighbouring markets.

Applying RBV to Rwanda's concert industry facilitates an assessment of how the country's distinctive assets—such as iconic venues (e.g., BK Arena), cultural heritage, and an emerging live music ecosystem—can be strategically utilised to differentiate Rwanda from competing destinations. By examining the availability of skilled labour in event production, logistical infrastructure, and the scalability of Rwanda's tourism sector, RBV provides a framework for identifying the country's intrinsic strengths and strategic gaps.

3. METHODOLOGY

This chapter outlines the data collection methods and analytical approach employed to address the research questions. Drawing from the insights established in the literature review, a qualitative research design was deemed the most suitable methodology for investigating the factors influencing Rwanda's attractiveness for large-scale concerts.

3.1. Study design

A qualitative research design was selected to explore complex phenomena, processes, and contextual factors (Payne, 2007) influencing Rwanda's attractiveness to multinational concert promoters, capturing stakeholder perceptions and industry-specific challenges (Merriam & Tisdell, 2016). It is particularly relevant for investigating the complexities surrounding the viability of Rwanda as a host for large-scale touring concerts, allowing for a richer understanding of both enabling factors and potential constraints (Morfoulaki et al., 2023).

3.2. Case Study Method

This study employs a case study approach for several reasons. Firstly, the case study method provides a structured framework for contextualizing and interpreting data, thereby allowing for an in-depth examination of the factors influencing country attractiveness for large-scale events (Yin, 2015). This methodology is particularly suited to exploring complex, multifaceted phenomena, which as the literature review illustrates is the case for investment decisions. As Merriam and Tisdell (2016) highlight, case study research is inherently time-bound and designed to investigate specific instances within a defined period, making it an appropriate method for assessing both the facilitators and barriers to foreign visitor and investor attraction for large-scale events.

Secondly, attracting large-scale events necessitates interventions across multiple policy and governance dimensions. The case study method allows for a focused exploration of these interventions within specific contexts, such as the case of Rwanda, offering nuanced insights into the mechanisms through which governments and private stakeholders seek to enhance their country's attractiveness (Merriam & Tisdell, 2016). Furthermore, leveraging multiple data sources—including interviews, document analysis, literature reviews, and direct observations—enhances the credibility and depth of the study's findings.

Additionally, by examining the case of a specific country, this study aims to identify recurring themes that may inform broader generalisations about country attractiveness for large-scale events. In doing so, it contributes to a more comprehensive understanding of the strategic and operational factors that influence a nation's ability to host and benefit from international concerts and similar events.

3.3. Data Collection Methods

Qualitative research facilitates the acquisition of in-depth descriptive insights from study participants, allowing for a comprehensive understanding of complex phenomena (Merriam & Tisdell, 2016). Semi-structured interviews were selected as the primary data collection method. Positioned between the rigidity of structured interviews and the open-ended nature of unstructured interviews, semi-structured interviews strike a balance between systematic inquiry and adaptability. This approach enables the researcher to elicit critical insights while also affording participants the

flexibility to contribute information relevant to the research context (Jamshed, 2014; Merriam & Tisdell, 2016).

3.4. Sample and Criteria

A non-probability sampling method was adopted, where the number of participants is not strictly defined but rather determined by the nature of the research inquiry (Merriam & Tisdell, 2016). In line with this approach, this study utilised a purposive sampling strategy to ensure that participants possessed relevant expertise and experience in the field of large-scale events in Rwanda.

The sample comprised talent agents, event promoters, venue providers, Rwandan service providers, and government stakeholders. The selection process was guided by a predetermined set of criteria, ensuring that participants met at least one of the following conditions: (1) substantial industry experience in managing, organising, or supporting large-scale events; (2) direct involvement as service providers or enablers of large-scale events in Rwanda; and, (3) a demonstrable understanding of Rwanda's positioning as a potential host for such events. Individuals who fulfilled these criteria were invited to participate, resulting in a final sample of nine voluntary respondents. Each interview, conducted with the full consent of participants, lasted between 60 and 90 minutes, ensuring a thorough exploration of the key themes relevant to this study.

Prior to their engagement in the study, all participants were informed of the research purpose and the expected duration of the interviews. Table 1 presents an overview of the participants according to the selection criteria.

Table 1: Participant Overview

Participant	Role	Interview Method	Experience in managing, organising, or supporting large-scale events	Direct involvement as service providers or enablers of large-scale events in Rwanda	Knowledge of Rwanda's attractiveness for large-scale events
1	Promoter	Remote video call	X	X	X
2	Promoter	Remote video call	X		X
3	Promoter	Remote video call	X		X
4	Promoter	Remote video call	X		X
5	Promoter	Remote video call	X		X
6	Government	In person	X	X	X
7	Service Provider	In person	X	X	X
8	Venue Operator	Remote video call	X	X	X
9	Talent Agent	Remote video call	X		X

This structured approach ensured that the study incorporated diverse yet relevant perspectives—combining both in-depth knowledge of the local market and insight into the global music industry, thereby strengthening the depth and validity of the findings.

3.5. Ethical Considerations

Maintaining ethical integrity and impartiality is fundamental in research involving participants (Merriam & Tisdell, 2016). One of the primary ethical principles in data collection is informed consent. Accordingly, before conducting the interviews, all participants were provided with comprehensive details regarding the study's purpose, scope, and nature. They were explicitly informed that their participation was voluntary and that their responses would be used strictly for academic purposes.

Confidentiality represents another critical ethical consideration in qualitative research. In line with best practices, measures were implemented to ensure the anonymity of participants and to restrict the use of their responses solely to the objectives of this research (Merriam & Tisdell, 2016).

Additionally, researchers must remain cognisant of the values, perspectives, and sensitivities of participants, ensuring that they are treated with dignity and respect (Merriam & Tisdell, 2016). Consequently, no attempt was made to influence or impose external perspectives on participants'

responses. Instead, care was taken to facilitate an open dialogue that allowed participants to express their knowledge and perceptions freely, thereby maximising the authenticity and depth of the data collected.

3.6. Data Analysis

Data analysis serves as a critical process for synthesising raw data and distilling it into meaningful findings (Rabiee, 2004). Merriam and Tisdell (2016) highlight that the purpose of data analysis is to identify recurring patterns within datasets, thereby addressing the research question(s). However, prior to analysis, data must first be systematically categorised. In qualitative research, this categorisation is typically achieved through coding and thematic development (Saldana, 2016).

To ensure data accuracy, all transcripts were subjected to multiple reviews. Following this, the data was systematically coded, organised, and subsequently refined into overarching themes. Coding constitutes the foundational step in converting unstructured data into analysable information. At its core, coding entails a process wherein data—ranging from sentences to entire paragraphs—is labelled with concise phrases that encapsulate its meaning (Linneberg & Korsgaard, 2019). This systematic approach enhances data validity by structuring findings in a coherent manner.

This study employed an inductive coding approach, facilitated through NVIVO 10 software. Initially, all transcribed data was imported into the software and subjected to iterative reviews to ensure accuracy and completeness. The next step involved assigning initial codes to segments of text in which 185 codes were generated from 9 interviews that were transcribed. Furthermore, the duplicate codes were consolidated. Finally, these refined codes were clustered into 25 broader thematic categories, thereby structuring the dataset into a cohesive analytical framework. Finally, the thematic analysis of these interviews resulted in the identification of six key themes, each of which contributes to the broader understanding of Rwanda's positioning within the live entertainment sector, and covers the breadth of external and internal factors identified by Porter's Diamond and the resource-based view:

1. **Audience Engagement and Market Potential** – Examining demand for live music in Rwanda, the demographic characteristics of potential audiences, and comparisons with other concert markets.
2. **Barriers to Country Attractiveness** – Identifying cultural, economic, and logistical factors that may deter international artists and promoters from considering Rwanda as a viable destination.
3. **Economic and Financial Considerations** – Assessing the financial dynamics of large-scale concerts, including revenue streams, sponsorship availability, and government support.
4. **Industry and Stakeholder Collaboration** – Evaluating the role of partnerships between public and private stakeholders in enhancing Rwanda's potential as a concert destination.
5. **Infrastructure and Logistics Readiness** – Analysing Rwanda's venue capabilities, technical resources, and logistical framework for hosting major events.
6. **Strategic Improvements for Future Growth** – Identifying actionable recommendations to enhance Rwanda's competitiveness and overcome existing barriers.

Each of these themes will be discussed in detail in the following sections, supported by direct participant insights and contextual analysis. The findings offer a nuanced understanding of Rwanda's

current positioning and inform strategic recommendations for strengthening its appeal as a destination for large-scale concerts.

4. FINDINGS

This chapter presents the key findings derived from the thematic analysis of Rwanda's attractiveness as a destination for large-scale touring concerts. Through a structured exploration of qualitative interview data, this section systematically outlines the factors influencing Rwanda's potential to host such events, alongside the challenges that may hinder its appeal to international promoters, artists, and audiences.

The study aimed to understand the determinants of Rwanda's attractiveness for large-scale concerts, as well as the barriers that may impact its ability to secure a strong position within the global live music industry. To achieve this, interviews were conducted with nine industry stakeholders, including government representatives, event promoters, talent agents, service providers, and venue operators. Their insights offer a comprehensive perspective on the opportunities and constraints that define Rwanda's competitiveness in hosting major international concerts.

4.1. Theme 1: Audience Engagement and Market Potential

The first emergent theme from the data pertains to the demand for live concerts in Rwanda. This theme is directly linked to the first research question, as understanding audience engagement provides insight into Rwanda's potential as a host for major concerts. Furthermore, it supports the study's objective of identifying the key determinants of Rwanda's ability to accommodate large-scale events.

The findings indicate that Rwanda has witnessed an enthusiasm for live music events, particularly among younger demographics. This reflects promising demand conditions as per Porter's Diamond model. Additionally, from an RBV perspective, the country's track record in successfully hosting international conferences underscores its potential, signifying competitive advantage. However, the size of the domestic market overall remains a key concern.

“Markets such as South Africa, Namibia, and Zimbabwe have been explored for concert hosting. A key factor in considering Rwanda is whether its population size and market demand can sustain large-scale events.” ~Participant 1

“It isn't a massive market. There aren't that many people there. I think we're talking around ten million, twelve million people total so. If you're talking about global artists, it's probably not going to make sense to play there.” ~ Participant 2

Therefore, significant visitor numbers would be required to make large scale events financially viable. Rwanda's reputation for scenic landscapes and natural attractions enhances its overall tourism appeal, drawing international visitors beyond the event itself and representing valuable internal resources according to RBV. Moreover, participants highlighted Rwandan Government policy choices that facilitate international event attendance. For example, the ease of obtaining a visa upon arrival encourages foreign visitors to attend concerts and other large-scale events.

“Our visa regime being very attractive. The fact that most people, one we can get visa on arrival. Everybody can get visa on arrival.” ~Participant 7

Another factor influencing Rwanda's attractiveness is the strategic interest of artists in emerging markets. Some performers seek opportunities to expand their audience base and explore new

territories. Participants noticed that Rwanda is perceived as offering superior event management, infrastructure, and logistical support compared to neighbouring countries, making it an ideal first choice for international artists with an interest in the Africa.

“Rwanda is ahead of Uganda and Tanzania in terms of venues and event infrastructure.” ~Participant 7

Participants highlighted strong alignment of interests between event promoters and the Government of Rwanda, with significant opportunities for collaboration. As participants noted that the financial benefits of the entertainment industry are increasingly being recognised by key stakeholders.

“So they’re starting to grow up as well and figure out that if they [government] can attract concerts, money will be made in the country.” ~Participant 8

4.2. Theme 2: Barriers to Country Attractiveness

This section examines the challenges that Rwanda faces in sustaining its attractiveness as a destination for large-scale international music events. The thematic analysis identifies five key subthemes, each representing distinct but interconnected barriers that impact the country's ability to position itself competitively within the global live entertainment industry.

4.2.1. Cultural Barriers

A predominant challenge emerging from the findings relates to cultural perceptions of Africa as a difficult market for foreign investment. Participants highlighted concerns regarding language barriers, cultural misunderstandings, and demographic considerations, which collectively contribute to an overarching hesitation among international stakeholders.

“Rwanda is always attractive as a potential market, and we are always looking at new opportunities. However, Africa is a difficult market.” ~Participant 2

This perception reflects significant weaknesses within Porter's 'Factor Conditions', particularly knowledge and cultural understanding. This impacts Rwanda's international reputation from an RBV standpoint, as these cultural perceptions undermine Rwanda's ability to capitalise on its existing cultural and infrastructure resources.

“You know, regardless of the money, for reasons of fear, for reasons of ignorance, for moral reasons, or for simplistic reasons, they [artists] just don’t want to perform outside of the Continental North America or Europe, or whatever it is.” ~Participant 3

4.2.2. Knowledge Barriers

A significant limitation to Rwanda's attractiveness stems from knowledge gaps—both within the global entertainment sector and the local industry. Many international promoters and artists lack a comprehensive understanding of African market conditions, which fosters misconceptions and inhibits interest in exploring Rwanda as a potential tour destination.

“This issue extends beyond Rwanda to most of Sub-Saharan Africa, where global promoters have limited knowledge of market conditions.” ~Participant 1

Additionally, infrastructural knowledge gaps within Rwanda present a further challenge. Several participants highlighted the limited awareness among local industry professionals regarding essential aspects of event production, such as technical infrastructure and market demand analysis.

“However, beyond the arena, little is known about Rwanda’s broader event production infrastructure, including sound, lighting, and stage equipment availability.” ~Participant 1

This highlights an internal resource gap from an RBV perspective, underlining the insufficient evidence available to multinational promoters such as AEG Live and Live Nation who require empirical data to assess market viability against their established benchmarks.

Building on this, the private sector’s reluctance to transparently share revenue data from concerts also impedes an accurate evaluation of the economic impact of large-scale events. Without clear financial data, promoters and investors remain uncertain about Rwanda’s commercial viability as a concert destination.

“Our private sector is not that good at sharing revenues” ~ Participant 6

4.2.3. Private Sector Limitations

The capacity of the private sector to support large-scale events is another critical constraint. Participants emphasised that promoters require confidence in the commercial ecosystem, including the availability of venues, suppliers, and logistical support, before investing in new markets.

“Additionally, promoters need confidence that venues, suppliers, and logistical support are available before investing in a new market.” ~Participant 1

However, uncertainty regarding market capacity continues to deter promoters. Participants noted that the lack of locally trained professionals with experience in large-scale productions further exacerbates these concerns, impacting overall production quality and reinforcing risk perceptions among international stakeholders.

“It is difficult to find locally trained professionals with experience in large-scale international productions.” ~Participant 7

This indicates a weakness in reference to Porter’s ‘Factor Conditions’ since the research highlights that skilled human resources are crucial for competitive advantage in the global concert industry.

4.2.4. Security Concerns

Security perceptions constitute another barrier to Rwanda’s attractiveness for international artists and their management teams. The challenge of convincing artists to perform in unfamiliar markets was repeatedly emphasised, with concerns often rooted in ingrained habits and risk aversion rather than factual security threats.

“And, you know, convincing artists to perform in new markets is very, very challenging because they're creatures of habit. And you know, where's the incentive to go and perform in, say, Rwanda or Yemen or Afghanistan.” ~Participant 3

Participants also indicated that, due to limited awareness of African cultural contexts, artists often perceive the continent as inherently risky. This generalisation affects Rwanda's ability to attract international talent, even though the country itself does not face the same security risks as certain other regions.

“Africa is still the unknown continent. There are a lot of artists who would like to come to Africa, but they're scared to. They don't understand what's available in the various countries.” ~Participant 8

4.2.5. Additional Structural Barriers

Beyond cultural, knowledge, private sector, and security concerns, additional structural barriers were identified. Participants cited Rwanda's relatively nascent concert promotion ecosystem as a barrier to entry for multinational promoters, since partnerships with strong local promoters were often critical to managing risk in a new market. Furthermore, the role of ticketing companies was highlighted as a critical factor in revenue generation, with the presence of a large, capable entity operating in this space deemed important to ensuring success.

Despite these challenges, some participants noted that Rwanda does not face technical constraints in hosting large-scale concerts. The physical infrastructure is largely sufficient, with no significant technical impediments to staging international performances.

“There are no barriers preventing Rwanda from hosting major concerts from a technical standpoint.” ~Participant 1

4.3. Theme 3: Economic and Financial Considerations

This theme examines the economic implications of large-scale events in Rwanda and the financial considerations necessary for the country to successfully host international concerts. The findings reveal three key subthemes: the economic impact of concerts, the role of government intervention, and the significance of sponsorships.

4.3.1. Economic Impacts of Concerts

Participants noted that concerts generate considerable economic activity, though measuring expenditures from ticket sales and merchandise is difficult due to complex spending patterns and preferences for alternative accommodations like Airbnbs.

“You know, our hotels are saying we don't have bookings because most people are staying in Airbnbs. How do we now bring Airbnbs into our spending calculation? So it's a bit hard.” ~Participant 6

This suggests limitations in the effective coordination of Rwanda's supporting industries, something integral to Porter's Diamond. This directly impacts the perceived financial attractiveness of Rwanda for international promoters and the case that can be made locally for Government support.

4.3.2. Role of Government

Government intervention is perceived as a critical factor in attracting international visitors and ensuring the financial viability of concerts in Rwanda. The study finds that while the government provides some support to concert promoters, this assistance is often insufficient due to inadequate financial planning within the industry. Many local promoters struggle with budgeting and miscalculating the costs associated with securing major artists, leading to financial instability and, in some cases, business failure.

“Many local promoters have gone bankrupt due to poor financial planning or miscalculating the costs of booking major artists.” ~Participant 9

This underlines a gap within Rwanda's 'Firm Strategy, Structure, and Rivalry' from Porter's perspective, as financial acumen among local firms is a factor in developing a strong competitive environment.

Furthermore, participants highlighted that the taxation structure presents additional financial barriers. In particular, the imposition of value-added tax (VAT) on ticket sales significantly reduces promoters' revenue streams.

“VAT on tickets is a big one and we've had this in a number of markets now where you've got a government saying that they want to host major concerts, but you've got 20%. 25% vat on ticket sales. So instantly if you're a show promoter to have to take 20% off the top when the margins are so thin as it is, then it just doesn't really make sense.” ~ Participant 2

This taxation model is viewed as a disincentive for hosting large-scale concerts, limiting Rwanda's competitiveness as an international concert destination.

4.3.3. Role of Sponsorships

Sponsorship revenue plays an integral role in determining the financial feasibility of large-scale concerts in Rwanda. Participants noted that private-sector sponsorship partnerships, combined with government-backed funding, contribute to the overall economic sustainability of the entertainment industry. The availability of sponsorship represents an important internal resource from an RBV perspective, potentially constituting competencies that could enhance Rwanda's competitive advantage.

“Since sponsorship revenue is often crucial for concert profitability, Rwanda's sponsorship landscape will directly impact whether large-scale concerts are viable.” ~Participant 1

The findings suggest that securing sponsorship is often challenging in Rwanda, with limited corporate investment in live music events compared to other sectors such as sports.

“Look at Kenya, like a festival can be provided, can be supported by Stanbic Bank, you know, BK [Bank of Kigali] and MTN [local mobile telecoms operator] can't do that” ~Participant 6

Participants noted that most sponsorship deals in Rwanda are negotiated on an ad-hoc basis, rather than through long-term agreements, creating financial uncertainty for promoters. Some also observed

that local brands and corporate sponsors were more inclined to support traditional entertainment sectors rather than live music, limiting available funding for concerts.

While the government plays a role in enabling the concert industry, financial constraints—including taxation, financial planning gaps, and a developing sponsorship market—continue to pose challenges for large-scale concerts in Rwanda.

4.4. Theme 4: Industry and Stakeholder Collaboration

This theme examines the significance of collaboration among key stakeholders in facilitating large-scale events in Rwanda. The findings highlight the necessity of strategic partnerships between government entities, promoters, and local stakeholders to enhance the viability and success of international events.

4.4.1. Government and Promoters Collaboration

The interaction between government bodies and event promoters is a fundamental driver of a flourishing entertainment industry in Africa, and Porter's Diamond emphasises the critical role of government policy and industry cooperation. The study reveals that government involvement through supportive policies, coupled with promoters who effectively navigate regulatory and logistical challenges, can enhance the prospects of hosting successful international events. A cooperative approach between the two entities ensures smoother operations, enabling promoters to leverage governmental facilitation while adhering to established regulations.

“A structured discussion between government and promoters would help align expectations.”
~Participant 2

4.4.2. Role of Local Service Providers

Local service providers possess critical contextual knowledge of market dynamics and operational landscapes. Their role extends beyond the execution of events, as they contribute to the dissemination of local expertise and cultural representation. The findings underscore that local stakeholders and promoters are instrumental in fostering international awareness of Rwanda's cultural identity, which serves to break down cultural barriers and facilitate artist participation.

“It [local stakeholder collaboration] also creates a huge amount of feel-good factor within the local community that's, you know, that's hard to measure, and then it also creates a significant amount of international awareness.” ~Participant 3

Local service providers play a role in ensuring the financial and operational feasibility of large-scale events, and leveraging their expertise would potentially represent unique internal resources from an RBV standpoint. Participants emphasise that their involvement strengthens both local and international impact, as their expertise and financial contributions support the execution of events in emerging markets.

“They help to provide financial assistance, as well as some operational assistance to help deliver events in a brand new city.” ~Participant 3

4.4.3. Role of the Rwanda Convention Bureau (RCB)

The Rwanda Convention Bureau (RCB) plays a pivotal role in attracting and facilitating large-scale events in the country. The study highlights that its involvement in promotion, coordination, and logistical facilitation provides Rwanda with a competitive edge in the international event-hosting landscape. Functioning as an information hub, the RCB offers guidance on regulations, logistics, and event planning, ensuring a streamlined approach for promoters and organisers.

“The one thing that makes Rwanda special, and what is our competitive advantage, is the fact that we have a convention bureau (RCB).” ~Participant 6

4.5. Theme 5: Infrastructure and Logistical Readiness

The ability of Rwanda to successfully host large-scale events is contingent on the robustness of its logistical and infrastructural capabilities. This theme critically examines the country's existing infrastructure and logistical preparedness in the context of attracting and sustaining international concerts. The discussion is structured into two key subthemes: infrastructural capacity and challenges, and infrastructural and technical capabilities.

4.5.1. Infrastructural Capacity and Challenges

Participants highlighted limited infrastructural capacity as a major concern for effectively supporting large-scale concerts. One of the primary challenges identified is the suboptimal utilisation of event spaces, which restricts the potential for maximising attendance and revenue generation. Additionally, the country faces a shortage of high-quality local production services, with limited access to experienced personnel and sophisticated concert infrastructure. This is compounded by the inadequacy of existing venues, which, while serviceable for some large-scale events, are not specifically designed for concerts.

While the BK Arena is Rwanda's primary venue for touring concerts, participants noted limitations in rigging and acoustic capabilities. Whilst it is a valuable resource, this lack of suitability impacts its status as a unique resource from an RBV standpoint. One participant notes:

“Because the other problem you've got is the fact that it's not geared or designed for concerts 100% so you lose the capacity by having to put a stage in, and you lose pretty much a third of the capacity by having to put a stage in for sight lines and things.” ~ Participant 8

4.5.2. Infrastructural and Technical Capabilities

Despite these challenges, Rwanda possesses certain infrastructural and technical strengths that can be leveraged to improve its standing as a host for large-scale concerts. While the BK Arena is not fully optimised for concert performances, it remains a valuable asset capable of hosting international events with targeted modifications. Furthermore, the country has established a foundational infrastructure that facilitates event promotion and logistical coordination, which is essential for attracting international concert organisers.

Additionally, Rwanda's technical ecosystem has demonstrated adaptability, with the capacity to adjust its event production framework in response to specific concert requirements. While large-scale outdoor venues remain limited, participants highlight the potential of undeveloped spaces that could

be repurposed for concert use with strategic investments, and which could directly address weaknesses in Rwanda's factor conditions as per Porter's Diamond. As one interviewee points out:

"While Rwanda lacks large-scale outdoor venues, there are undeveloped spaces that could be adapted for concerts." ~ Participant 7

4.6. Theme 6: Strategic Improvements for Future Growth

The final theme of this study examines the strategic advancements necessary for the collective enhancement of Rwanda's entertainment industry, particularly in positioning the country as a viable destination for large-scale international concerts. This theme directly corresponds to the research question and the third research objective, which focus on proposing strategic recommendations to strengthen Rwanda's appeal for international event organisers and attendees.

The findings indicate that Rwanda's entertainment industry holds potential as a vehicle for increasing international visibility and fostering global competitiveness. Beyond serving as a cultural asset, the entertainment sector emerges as a strategic economic lever, capable of attracting foreign direct investment and promoting the country's brand on the global stage. To further elevate Rwanda's attractiveness for large-scale events, several strategic imperatives have been identified by the study participants.

Participants underscored the importance of comprehensive market research to better understand global entertainment trends, ensuring that Rwanda's infrastructure, service providers, and venue capabilities align with international standards. Furthermore, financial planning and investment remain critical to the successful execution of large-scale events, with respondents emphasising the role of long-term strategic financial commitments to mitigate risks and enhance Rwanda's competitiveness (and which would align with Porter's Diamond in the sense of enhancing Demand Conditions):

"Rwanda's concert market remains unclear, and promoters would require comprehensive audience research, including social media engagement metrics, to assess its potential." ~Participant 9

Addressing the structural and financial limitations discussed in previous themes, participants highlighted key areas for policy and investment focus. The expansion of public-private partnerships, coupled with controlled yet proactive government intervention, is viewed as essential for enabling a sustainable event ecosystem. Additionally, increased funding opportunities, particularly those facilitating co-financing arrangements between international promoters and the government, could reduce financial risks for new market entrants. This reflects the need for a strong supporting industry structure according to Porter's Diamond.

"Rwanda's government should collaborate with international promoters to co-finance and manage events, reducing financial risk for new market entrants." ~Participant 6

4.7. Word Cloud

Following the thematic analysis of the data, the most frequently occurring words within the dataset were visualised using NVIVO 10. The resulting word cloud, as illustrated in Figure 1, highlights the predominant terms that emerged across the interviews and textual analysis, offering insight into the key themes and focal points of the study.

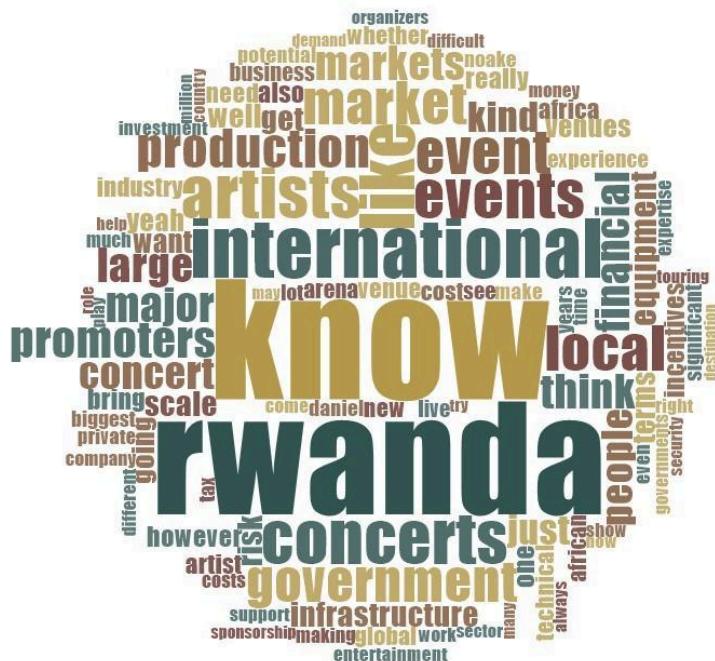


Figure 1 – Word Cloud

A key takeaway from the word cloud is the prominence of *knowledge* (*know*), which underscores that the primary challenges discussed in the interviews are not just infrastructural but informational. Rather than focusing solely on physical infrastructure, stakeholders emphasised gaps in market knowledge—both internationally, where promoters lack awareness of Rwanda’s potential as a concert destination, and locally, where industry professionals require more expertise in large-scale event production. This aligns with findings on the need for better data transparency, targeted marketing efforts, and knowledge-sharing between global and local stakeholders. Additionally, the frequent appearance of *government* and *local* reinforces the role of public-private collaboration in addressing knowledge gaps and strengthening Rwanda’s position in the international touring market.

5. DISCUSSION

5.1. Factors Contributing to Rwanda's Attractiveness

As Schäfer et al. (2013) note, music has become an integral part of everyday life, serving as a key feature of various social events. Given its enthusiasm for concerts, this trend underscores Rwanda's potential to develop as a viable destination for large-scale music events. Strong local and international demand encourages industry growth and therefore contributes to enhancing the competitive advantage of a country in hosting large-scale events (Porter, 1998). However, population size and market demand remain critical determinants of Rwanda's ability to attract and sustain large-scale concerts. Encouragingly, Cai (2024) highlights that both artists and audiences are increasingly willing to travel for concerts, driven by the rising demand for live music experiences.

Rwanda's appeal as a potential tour destination is also reinforced by international collaboration. Study participants identified strong partnerships between global promoters and local stakeholders, including government entities, playing a pivotal role in shaping the country's attractiveness. Cornwell and Kwon (2019) emphasise the significance of sponsorship collaboration in the concert industry, noting that such partnerships not only enhance marketing opportunities but also provide financial support to artists, contributing to overall revenue generation. The findings of this study also indicate that the crucial role of Government policy in supporting the economic viability of this sector in Rwanda. Cai (2024) argues that beyond their entertainment value, large-scale concerts now represent a major source of economic development, further justifying Rwanda's investment in this sector.

The financial feasibility of concerts in Rwanda is contingent upon government support and broader structural factors. Snijman and Saayman (2009) highlight the role of government policy in shaping the attractiveness of South Africa's tourism sector, suggesting that a similar approach could benefit Rwanda's live music industry. Findings from this study reinforce the importance of strong sponsorship agreements and public-private collaboration in enhancing Rwanda's potential as a concert destination. Markets that benefit from financial backing, whether through government initiatives or private sector partnerships, are better positioned to attract and sustain large-scale concerts. As such, Rwanda's ability to establish a robust framework of institutional support and financial incentives will be a key determinant of its long-term success in this industry.

5.2. Barriers to Country Attractiveness

The second major theme emerging from this study concerns the challenges that hinder Rwanda's attractiveness as a destination for large-scale concerts. The findings reveal obstacles that impact Rwanda's potential to host international artists.

Perception of risk among artists and promoters identified in this study aligns with wider patterns influencing foreign direct investment (FDI) flows into Africa. Scholars have long established that risk perception—whether political, economic, or security-related—is a key determinant of FDI attractiveness (Hayakawa et al., 2013). While Rwanda enjoys political stability, its positioning within Sub-Saharan Africa, where investment risk is often overstated, may lead to hesitancy among international event promoters. Naudé and Krugell (2007) argue that perceptions of political risk in Africa often outweigh tangible investment benefits, making it difficult for new markets to attract foreign capital—including event investment.

Knowledge barriers exist among international promoters, many of whom rely on outdated assumptions about Africa's event-hosting capacity. Tindan (2023) highlights that FDI decision-making is influenced by perceptions as much as economic fundamentals, suggesting that promoters assessing new touring destinations may operate under similar biases. Cleeve (2008) and Bartels et al. (2014) found that while infrastructure and tax incentives attract FDI, concerns about regulatory transparency and logistical efficiency deter long-term investment. Similarly, the global live music industry prioritises established, low-risk markets, limiting the willingness of promoters to experiment with destinations that lack a proven track record (Tegegne, 2024).

Nation-branding strategies have been shown to mitigate risk perceptions and enhance investor confidence (Baiocchi et al., 2024). Rwanda's success in attracting FDI in sectors such as tourism through this approach suggests that a similar effort is required for the entertainment industry. Dimitrov et al. (2017) emphasise that strategic promotion and government-backed investment can shift perceptions, making new markets more attractive to foreign investors.

5.3. Industry and Stakeholder Collaboration

The study indicates that successful international events depend on a combination of political stability and proactive government intervention through supportive policies, alongside promoters collaborating with authorities who offer procedural flexibility and effectively address logistical challenges. Participants highlighted Rwanda's political stability as a critical advantage, echoing findings in existing literature that emphasise stability as a foundational requirement for attracting international investment and events (Tindan, 2023; Adeola et al., 2020; Naude and Krugell 2007). They noted that Rwanda benefits from its stable governance, which enhances investor confidence and distinguishes it positively from less stable regional markets. However, they also emphasised that misconceptions regarding political stability in Africa continue to persist among international stakeholders, creating unnecessary hesitation despite Rwanda's relative security.

The study further reveals that local stakeholders are instrumental in ensuring the financial and operational feasibility of large-scale events, thereby creating local and international impact. Rwanda Convention Bureau (RCB) plays a central role in attracting and facilitating such events. Its core principle is to draw events that bring visitors to the country, such as the UCI World Road Cycling Championships (Rwanda Convention Bureau, 2023). Porter (1990) suggested that a network of well-developed supporting structures strengthen industry partnership and aids in securing long-term relationships. RCB's active involvement in promotion, coordination, and facilitation confers a competitive advantage on Rwanda for the international community. This directly reflects literature advocating structured frameworks and partnerships as essential to overcoming barriers to international event hosting (Andersson & Getz, 2008).

5.4. Infrastructure and Logistical Readiness

Rwanda's capacity to host large-scale events is fundamentally influenced by its infrastructure and logistical capabilities. The study highlights that while the country has made notable investments in its event infrastructure, certain challenges persist. Jahan (2020) emphasises that infrastructure is a critical determinant of a developing nation's attractiveness. However, Onyeiwu and Shrestha (2004) present a counterargument, suggesting that infrastructure alone does not significantly impact a country's attractiveness.

Although infrastructure quality is a pivotal factor in attracting large-scale touring concerts, the findings in this study similarly suggest that the mere availability of infrastructure is insufficient. Participants emphasised that Rwanda's challenge is not the infrastructure itself, but its effective utilisation and the development of local capacity to manage complex events at an international standard. Therefore, strategic investment in human capital and technical capabilities is as crucial as physical infrastructure upgrades. The availability of skilled and certified riggers represents an example of shortage of skilled labour (Porter, 1990).

This study finds that Rwanda's technical capabilities do demonstrate adaptability, allowing event infrastructure to be adjusted to meet concert requirements. However, certain improvements remain necessary to enhance the overall viability of international performances. While the existing infrastructure is generally suitable for hosting large-scale events, significant challenges persist.

5.5. Strategic Enhancements for Future Growth

The findings indicate that Rwanda has the potential to strategically position its entertainment industry as a key driver of international recognition and competitive advantage. Beyond its intrinsic cultural value, the entertainment sector can serve as a mechanism to attract global attention and facilitate foreign direct investment (FDI). Andersson and Getz (2008) have extensively examined the role of events and festivals in tourism marketing, highlighting their contributions to global cultural and socioeconomic development. To maximise Rwanda's potential in this regard, it is imperative to engage in benchmarking against markets such as Egypt, Kenya, and the Middle East, enabling a comprehensive understanding of the factors that underpin the economic and social success of large-scale concerts. Furthermore, robust collaboration among key stakeholders remains essential to ensuring the sustained growth and international viability of Rwanda's entertainment industry.

A coordinated approach, underpinned by public-private partnerships, measured government intervention, and expanded funding opportunities, emerges as a pivotal strategy for enhancing Rwanda's event-hosting capacity. Bakan and Doğan (2012) assert that a nation's attractiveness is shaped by the presence of supportive industries, proactive government policies, and well-established collaborative networks between public and private sector actors. This study underscores the strategic potential of Rwanda's entertainment industry as an instrument for strengthening the tourism sector, driving international engagement, and fostering economic growth. In this context, the integration of promoters, government entities, and industry stakeholders is identified as the critical determinant of Rwanda's ability to establish itself as a competitive destination for large-scale concerts. This holds particular relevance in African markets, where securing performances from internationally renowned artists remains a persistent challenge. Consequently, developing an ecosystem that actively facilitates such engagements will be instrumental in reinforcing Rwanda's attractiveness as a global entertainment hub.

5.6. Summary

The discussion synthesises the study's findings, highlighting Rwanda's emerging potential as a destination for large-scale concerts, driven by rising local enthusiasm, strategic government support, and international collaboration. However, key challenges persist, notably perceptions of risk among global promoters, limited market size, knowledge gaps, and an underdeveloped private sector. Infrastructure is generally adequate, though issues including skilled personnel shortages and suboptimal venue utilisation, remain constraints. The study emphasises the importance of enhancing

local capabilities, strengthening public-private partnerships, and strategically positioning Rwanda to overcome barriers and fully leverage its potential within the global live entertainment industry.

6. CONCLUSION

Rwanda has consistently pursued its ambition of becoming a premier destination for international conferences and large-scale events. The country's attractiveness as a tourism and event-hosting hub has improved alongside advancements in infrastructure and technical capacity. However, despite these efforts, Rwanda has yet to fully establish itself as a preferred destination for global touring artists and large-scale concerts. Scholars argue that this gap is attributable to a lack of comprehensive knowledge on how tourism development functions and how to enhance a country's attractiveness in this domain (Christie et al., 2014). Existing literature highlights barriers such as political instability and inadequate strategic planning as limitations to tourism and investment (FDI). This study identified strategic interventions to enhance Rwanda's attractiveness for large-scale touring concerts.

The findings indicate that, with international collaboration, Rwanda possesses significant potential as a destination for large-scale concerts. However, a key challenge remains the lack of awareness among international artists and promoters regarding the opportunities available in the country. To enhance its appeal to international artists, Rwanda must address key barriers, particularly misconceptions regarding security risks and infrastructure readiness, alongside developing a skilled workforce for event delivery.

The study further identified several strategic interventions that could enhance Rwanda's attractiveness as a concert destination. These include strengthening public-private partnerships, fostering controlled government intervention, and expanding funding opportunities. Additionally, the research emphasises the importance of coordinated efforts between the government, international promoters, and local stakeholders to create an enabling environment that encourages global artists to consider Rwanda as a viable tour stop.

6.1. Recommendations

Reflecting on Porter's Diamond Model, the factor conditions shaping Rwanda's events industry are not centred on large-scale infrastructure availability but rather on the specialised expertise and technical equipment required to produce concerts at an international standard. In terms of demand conditions, Rwanda's relatively small domestic market means that tapping into the international tourist market will be essential. Consequently, the transport and tourism sectors emerge as key related and supporting industries that require further investment.

Given that Rwanda's events sector remains in its early stages of development, government policy will be a decisive factor in shaping firm strategy and industry structure. A careful balance must be struck between incentivising international players to enter the market and fostering the growth of local capacity. From a resource-based view (RBV) perspective, this study has highlighted Rwanda's distinctive advantages within the African concert market while also identifying knowledge gaps that have hindered awareness among international promoters and artists. Addressing these gaps and enhancing global recognition of Rwanda's potential as an events destination will be crucial.

Building on these insights, the following recommendations are proposed:

1. Integrate entertainment into Rwanda's national economic strategy.

Given the economic benefits associated with hosting large-scale concerts, such as increased tourism revenues, job creation, and enhanced international visibility; Rwanda's government

should formally integrate live entertainment into the National Strategy for Transformation (NST2) and related tourism and investment policies. By explicitly identifying entertainment as a strategic economic sector, the government can effectively align infrastructure development, regulatory frameworks, fiscal incentives, and resource allocation to foster Rwanda's emergence as a premier international concert destination. While this could boost Rwanda's economic diversification and attract greater foreign direct investment, it also necessitates careful management of trade-offs. For example, diverting resources from existing strategic sectors or prioritising international promoters over local entertainment providers. Successful implementation will depend on coordinated efforts among stakeholders, including the Rwanda Development Board (RDB) and local businesses, supported by clear objectives, measurable targets, and regular stakeholder consultations.

2. Strengthen international partnerships and sponsorships.

To enhance Rwanda's appeal as a viable stop on global music touring circuits, the government, working closely with local stakeholders, should proactively build strategic relationships with international entertainment agencies, artist management firms, and global sponsors. This would help overcome some of the knowledge barriers identified in this study. Moreover, these partnerships offer benefits including improved access to high-profile artists, increased international audience engagement, and stronger global visibility for Rwanda's entertainment sector. However, pursuing these collaborations may pose challenges, such as potential dominance by international entities, which could limit the opportunities of local promoters and service providers. Successful implementation will need clearly defined partnership frameworks that ensure fair participation benefits for local stakeholders. Collaborative oversight by the Rwanda Convention Bureau (RCB), alongside transparent agreements and measurable partnership outcomes, will be crucial to balancing international engagement with local industry development.

3. Conduct comprehensive market research and economic impact assessment.

To address persistent promoter uncertainty regarding Rwanda's concert market viability, Rwanda should establish a robust audience data and market research initiative. Systematic collection and dissemination of market insights such as audience demographics, spending habits, social media engagement metrics, as well as post-event economic impact—would reduce market-entry uncertainty. While this initiative is resource-intensive and demands specialised expertise, it directly supports informed decision-making and strategic planning among international and local stakeholders alike. Collaboration between the RCB, research firms, local businesses, and promoters would ensure actionable insights, to drive informed investment and promotional strategies for Rwanda's concert sector.

4. Establish local event production capacity-building initiatives.

Establishing structured training and certification programs focused on large-scale concert production would directly address the shortage of qualified local professionals, thereby enhancing Rwanda's capability to manage complex events. This long-term strategy promises increased employment opportunities, improved quality of local event execution, and a decreased reliance on foreign expertise, making the industry more sustainable. Nevertheless, this approach requires considerable initial investment and the patience to await gradual returns as skill levels increase. Initial pilot projects should leverage partnerships with experienced international training institutions to ensure alignment with global industry standards.

5. Enhance stakeholder collaboration and cross-sector engagement.

To foster greater growth in Rwanda's concert industry, the government should facilitate structured dialogue involving Rwandan entities in tourism, commerce, and finance, alongside private-sector stakeholders and international promoters. This study has shown the critical importance of bringing visitors into the country if large-scale concerts are to be viable. Establishing a clearly defined framework for regular cooperation would yield significant benefits, such as improved coordination in event planning, streamlined logistics, and more strategic use of sponsorship resources. Enhanced communication may lead to better-aligned objectives and a unified vision for promoting Rwanda as a leading concert destination. Nevertheless, achieving this level of cross-sector collaboration might present challenges, including potential bureaucratic complexity. Effective implementation will require leadership, ideally from the Rwanda Convention Bureau to balance competing interests and ensure accountability across all parties.

6. Introduce fiscal incentives targeted at music promoters.

Introducing targeted fiscal incentives, particularly VAT waivers on ticket sales and elimination of withholding tax on artist payments, would enhance Rwanda's competitiveness by increasing promoter profitability and reducing entry barriers for international concert promoters. While these incentives could immediately boost Rwanda's appeal and accelerate event frequency, they would simultaneously reduce short-term tax revenues and potentially create market distortions if overly generous. Strategic, limited-time incentives which are monitored by government and calibrated through regular market reviews would minimise risks, while effectively positioning Rwanda as a financially attractive destination.

7. Enhance international perceptions of Rwanda as a concert destination.

Many international artists and promoters express apprehension about performing in Sub-Saharan Africa due to perceived security concerns. Rwanda should proactively implement targeted international marketing and PR campaigns designed to improve perceptions of safety and stability. Such initiatives can directly enhance artist willingness to visit Rwanda, contributing significantly to increasing the country's attractiveness for global tours. Despite being relatively economical, these campaigns necessitate sustained effort and carefully designed reputation management strategies. Coordinating closely with the Rwanda Convention Bureau (RCB), tourism boards, and international promoters can maximise effectiveness while monitoring international sentiment changes.

8. Increase investment in concert venues and technical capabilities.

While Rwanda has improved its event-hosting capabilities, further investment is needed to enhance concert-specific infrastructure including rigging capabilities and local equipment standards. Such changes would increase venue attractiveness. While this investment promises significant long-term returns in terms of enhanced marketability and venue utilisation, the upfront capital requirements and potential disruption must be carefully managed. Collaboration among venue operators, government agencies, and local service providers during planning and phased implementation would be essential to mitigate these short-term disruptions effectively.

9. Develop public-private partnerships (PPPs) to support long-term growth.

To boost international promoter confidence and manage the perceived financial risks

associated with large-scale concerts, Rwanda should consider structured public-private partnerships (PPPs) that offer clear co-financing frameworks. This approach would reduce financial barriers for multinational promoters, stimulate economic growth through increased event activity, and build trust in the country's event-hosting capabilities. However, this strategy requires careful oversight to avoid creating excessive reliance on government funding or inadvertently disadvantaging local promoters who may lack the financial scale to compete. A phased implementation approach, supported by clear legal guidelines, is advisable to balance financial risk and promote balanced stakeholder participation.

By implementing these strategic measures, Rwanda can significantly enhance its appeal to international concert organisers and strengthen its position as a leading destination for large-scale musical events in Africa.

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