

TOURISM DEVELOPMENT IN KENYA: CONSTRAINTS AND OPPORTUNITIES**TOM G. ONDICHO¹**

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ABSTRACT

The increasing numbers of international tourists around the world, especially after the Second World War, raised the interest of many countries in tourism development. Many developing countries, particularly in the African region, are promoting tourism as a key strategy for economic development. This paper examines the present conditions and perspectives of tourism development, with consideration given to tourism resources, tourism policy and the existing tourism plan in Kenya as a case of a developing country in Africa. The problems and recommendations of tourism development found in Kenya are described under three major issues of domestic problems, tourism development, and market promotion. The conclusion of the paper covers several issues which may be expanded and applied to other African countries such as: (a) establishment of sustainable tourism development policy; (b) differentiation from other countries, especially those in the same region; (c) adoption of new tourism concepts; (d) establishment of a tourism master plan at the national level; (e) implementation and revision of existing tourism plans; (f) continuous monitoring of international tourism trends; and (g) continuous collection of data on the profile of tourists and on other aspects of the tourism sector.

Keywords: Tourism Development: Developing countries: Kenya: Africa.
Introduction.

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The growth of tourism has been observed mainly after the Second World War. In the 1950s and at the beginning of the 1960s, this trend began to spread among Western European and North American countries, and later throughout the world. International tourism has particularly expanded significantly in Eastern Europe and is becoming an important sector in many developing countries in Asia, Africa, Latin America, the South Pacific and the Caribbean. Many developing countries, faced with uncertain world market prospects for primary products and strict limits to the amount of manufactured exports that the industrialized nations are willing to accept, view tourism as one of the few opportunities available for economic development. For many of these developing countries, tourism provides useful avenues for diversifying their sources of foreign exchange earnings and employment creation. Most developing countries, particularly those in the African region, are currently promoting tourism development not only for economic and social reasons, but also as part of their globalization policy. For instance, after the fall of apartheid, many South African countries that previous had not encouraged tourism opened their doors to tourists. Even South Africa itself that had not encouraged tourism previously and had only received a very limited number of tourist arrivals became a major competitor to other established destinations in the continent.

Globally, the overall characteristic of international tourism trend in the 1990s is that tourist destinations are rapidly diversifying (WTO, 1994). Most countries, with the exception of those embroiled in political turmoil in Africa, Eastern Europe and Asia, show increases in tourist arrivals and it is projected that tourist arrivals to all regions will increase in the first decade of the twenty-first century. However, only a few regions, particularly those in the Middle East, South Asia, Asian Pacific, and to some extent, Africa, are likely to see faster growth in international tourists arrivals than experienced in the 1990s, mainly reflecting the more settled political and social conditions anticipated in these regions.

The above forecasts indicate that the tourism sector will maintain its powerful position as one of the major contributors to economic growth in the African region in the twenty-first century. Therefore, many countries in the region will have to consider their international and regional roles and achieve a balance in development and conservation when undertaking tourism development. Each country in the region will see the need to compete against all others in order to attract tourists and adopt further

action for tourism development. Tourism development involves policy planning, physical planning, and marketing strategy. Moreover, tourism development in the twenty-first century should also adopt sustainable development as one of its major goals. Within this context, the role of developed countries and international agencies includes not only serving as funding sources and providing assistance for countries and projects, but also guiding the overall tourism planning in the regions within the context of regional development.

This paper examines the present conditions and perspectives of tourism planning, with consideration given to tourism resources, tourism policy, and the existing tourism plan in Kenya as a case of a developing country in Africa. With few prospects for economic growth, many African countries have often cited Kenya as a model that has chosen tourism as the principal means of economic development. But the conditions that may have affected Kenya's success in the past three or so decades may no longer be applicable in today's competitive global tourism industry. In recent years, particularly in the 1990s, Kenya's tourism industry has been experiencing problems of poor performance and a decrease in the number of international tourist arrivals (Ondicho, 2000, 2001; Kenya, 1999; Akama, 1997). Consequently, Kenya's tourism industry has been the subject of extensive reexamination by both the private sector and government who are concerned that the State's visitor industry may have entered a stage of permanent decline. The country has been continuously collecting tourist data and has already developed a tourism master plan. With these data and material, Kenya constitutes an interesting case study. Kenya's experience can provide other African destinations with a number of lessons in terms of planning and public policy to assist in their own development.

Methodology

Ideally, an effort to find out the present conditions, problems and perspectives in Kenya's tourism industry requires fieldwork in the country. This could involve a variety of qualitative and quantitative research techniques, including interviewing several people in the tourism industry, government and receiving areas. However, such an approach could not be adopted in this study mainly due to the lack of the necessary resources. Under such circumstances, the only alternative was library research. Considering that questions of tourism development in the developing world

are emerging in the international academic fora and in the absence of actual fieldwork, it would be impossible to evaluate the problems and constraints of tourism development other than relying on the available literature and data. For instance, the works of Jenkins (1982) on the effectiveness of tourism development and government involvement; Theuns (1997) on the economic impact of international tourism, and Harrison's (1992) description of conditions in several developing countries, provide useful insights into tourism development in different countries and thus, permits easy comparison. Also, papers by Akama (1997, 1998); Ondicho (2000, 2001); Sindiga (2000); Sinclair, (1990); Dieke (1988) and Gamble (1989) provide valuable information and ideas that throw more light on the constraints and opportunities in Kenya's tourism development.

The literature on the general geography of Kenya and the annual tourism market reports of the Ministry of Tourism and Wildlife (now the Ministry of Information and Tourism), and survey reports of the Central Bureau of Statistics, and the National Development Plan and Economic are valuable source material for information on the tourism industry in Kenya. The data generated from these sources was basically statistical. Equally important are, newspaper reports, published research findings and analytical articles in journals on tourism. All these provided useful information on tourism resources, policies, development strategies, problems and constraints in Kenya.

Tourism in Kenya

Tourism Resources

Kenya is located in the East African region of the African continent and straddles the equator. It has a total area of 582, 646 sq.km (224,960 sq. miles) and according to the 1999 National Population Census, a population of 28 million people, made up entirely of Africans with small minorities of Asians, Arabs and Europeans (CBS, 2001). Languages are English (official language), Swahili (national language) and several ethnic dialects; major religions are Islam, Christianity and traditional religions. Such diversity in language and religion is derived from its historical background and trade relationship with the Middle East and its key position as a regional stopover point for international travelers. The country was colonized by Britain

between 1895 and 1963. The current political system is democratic and the people directly elect the head of the state after every five years.

Natural Resources

The geographical features of the country include natural endowments in wildlife, a pleasant climate, beautiful scenery and sandy beaches. Diversity and contrast characterize both its people and geography. Its varied terrain rises from the sea level at the coast to Mount Kenya (5, 199metres) to the east of the Great Rift Valley, and Mount Elgon (4, 321 metres) to the far west. The country is bisected by the Great Rift Valley that runs through the whole country from north to south. Unique species of plants and wildlife, some unique to the country and distributed in well over 40 locations, in what is known as National Parks and Reserves, constitute the main tourist attraction/product. Kenya's total wildlife conservation area covers 15, 797 square miles (about 7.5%) of the national land (Yeager and Miller, 1986:77). The system comprises 26 National Parks, 30 National Reserves, 4 National Marine Parks, 5 National Marine Reserves and 1 local sanctuary.

The other natural features of interest to tourists are sandy beaches stretching over some 480 km. along the Indian Ocean coast of the country, and suitable for marine resort establishments. Beach holidaying is in four popular locations: Diani Beach on the south coast, Mombasa in the north, and Malindi/Watamu and the Lamu archipelago. The coast resources also include sand beaches fringed with palm groves and the warm seawater sheltered by coral reefs. As for climatic characteristics, the country is divided into the rainy season and the dry season. The rainy season is usually experienced between April and May, and around November. Otherwise the rest of the year is dry and sunny.

Cultural Resources

There has been a long history of a flourishing Islamic culture dating from the eight century AD when Muslims from the Arabian Peninsula and Shirazis from Persia (now Iran) began to visit the East African Coast. After the early years of trade with the Middle East, a colonial culture developed from around the sixteenth century during the administrations of Portugal, Oman, and the United Kingdom. Historical sites including mosques and other buildings, some of which have a strong Arab architectural influence, dating

back to various Portuguese and Arab dynasties within the period before British occupation, which began in 1888. The city of Mombasa served as the capital city of these dynasties. Due to the struggle for supremacy between the Portuguese, Oman and Mazrui Arabs there are many historical ruins of forts, mosques, tombs and whole towns such as Fort Jesus, Gede ruins and Old Town, littered in the Kenyan coastal town of Mombasa, especially in the north around Lamu. Since the city is characterized by tourist attractions such as beaches, a mamba (which is a Swahili word for crocodile) village, marine park, cultural villages, various cultural performances, and folk art, it serves as a day trip destination for tourists who stay at the beach resorts.

The capital city, Nairobi, which is the center of economic activities is a place in which most tourists spend a day or two shopping for Kenyan mementos and gifts to take home. Main entertainment centers include the Bomas of Kenya with exhibitions of African dances; Karen Blixen Museum, the house where Karen Blixen of the "Out of Africa" fame lived; the National Museum, famous for Leakey pre-history discoveries and tribal artifacts; Utamaduni, an up market craft center in Langata; a giraffe center; convention facilities; and parks (game and snake).

Economic Impact of Tourism

Tourism greatly contributes to the national economy through direct and indirect employment, foreign exchange earnings, government revenue, and other economic benefits. The total tourism sector revenue has been about 10 per cent of the gross domestic product (GDP), and since 1987, has consistently surpassed tea and coffee as the leading source of foreign exchange earnings. The total amount of foreign exchange earnings was just over Kenya pounds 1,068 million in 1999 reflecting a 22.1 per cent increase from Kenya pounds 875 million recorded in 1998 (Kenya, 2000). The growth of inclusive tour "package" holiday tourism has, over time, significantly reduced the real value of earnings per tourist. Kenya receives only a minor share of spending on inclusive tour holidays in the majority of cases when tourists' travel is provided by the foreign airlines with which overseas tour operators tend to negotiate contracts.

It is not clear whether the projected increase in tourist arrivals would result in an increase or decrease in Kenya's foreign currency earnings from tourism, since econometrically sound estimates of the price elasticity of

demand for Kenyan tourism are lacking. Previous studies are few in number and have produced results of which only some are statistically significant (Summary, 1987).

Tourist Profile

The number of tourist arrivals showed a continuous increase to more than 676,000 in 1988 from 110,000 in the 1960s reflecting an average annual growth rate of approximately 10 per cent. The demand for tourism in Kenya was fairly stable between 1980 and 1989 as can be seen from (table 2) which shows the number of total tourist arrivals over time. After a downturn in 1990 and 91, demand grew very rapidly, increasing from 963, 500 in 1993 to over one million in 1994. Unfortunately, after almost picking up in 1994, the industry suffered another slump in 1995 with the number of arrivals declining by 20 per cent from 863,400 in 1994 to 690,500 in 1995. Recently, a further downturn in tourism was experienced between 1997 and 1999, a two explanations have been advanced for this. One stresses internal factors as the cause of the downward trend while the other stresses external factors (Ondicho, 2000). However, it is possible to argue that much of what happened to Kenya in the past was a result of timing and luck rather than sound planning.

Tourist arrivals by region of residence indicate that Western Europe is the dominant region with a share slightly over 60% and a growth rate of 20 per cent. Recent trends indicate that Africa was the second largest among the world arrivals. A country-to-country analysis shows that the United Kingdom and Germany accounted for more than a third of the total arrivals in 1994. Other important markets have been Italy, France, Switzerland and Sweden. As far as North America is concerned, the largest amount of tourist traffic comes from the United States, although Canada is clearly increasing. Arrivals from African countries amounted to little more than a fifth of the total in 1994. Tourist arrivals are concentrated during the dry season, from June to September, with the highest number in December.

Tourist expenditure patterns also exhibited a change, as tourists spent more time and money shopping (Table 3). In 1986, international tourists spent almost 44 per cent of their budget on lodging/accommodation and food and 27 per cent on shopping. By 1990, shopping expenditure accounted for 39 per cent, while spending on accommodation and food decreased to 38 per

cent. Inexpensive arts and crafts are some of the most popular shopping items for international visitors.

Tourists stayed a total of 2,947, 178 days in 1996 and the average stay per person was 9.8 days. The average stay for European tourists was 15.7 days, which was the longest among the eight regions, and 11.6 for North America and 10.9 days for Africa. The average stay for Asian tourists was seven days, which may be due to several factors such as short access-hours, holiday systems, and the prevalence of package tours.

Due to lack of data, the volume of domestic tourism in Kenya is difficult to estimate; however, family holiday trips especially to rural homes, picnics, and sightseeing are popular among the local population. Several constraints to domestic tourism have been noted such as expensive transportation costs, poor road networks, high number of road accidents, lack of affordable accommodation, and lack of security in some parts of the country, especially for local people. Nevertheless, domestic tourism is becoming popular, particularly among affluent Kenyans who tend to stay at beach resorts and spend a few days during the off-season when discount prices are offered. Moreover, the number of couples who spend their honeymoons at resorts is also increasing. It is common for those who may not be able to afford an overnight trip, to visit the parks as a day trip. The concentration of domestic tourism is observed especially during school holidays and public holidays.

History of Tourism Policy in Kenya

Tourism development and promotion in Kenya attracted the attention of the government from 1965 when tourism was included in independent Kenya's first National Development Plan, 1965-1970 (Kenya, 1965a). The plan aimed at strengthening the Kenyan economy in the areas of international trade, investment, and tourism with a view to boosting foreign exchange earnings as well as creating and expanding employment opportunities. Consequently, the Ministry of Tourism and Wildlife (now Ministry of Information and Tourism) was created in 1966 as the main policy making organ of the Kenyan government in tourism and wildlife matters. Part of its brief was to allocate tourism resources to cover activities carried out by other public bodies whose responsibilities involved on tourism. Kenya's tourism development objectives, as set out in the first National Development Plan were: "to increase tourism's contribution to the growth of Gross

Domestic Product; raise foreign exchange earning capacity; create more employment opportunities; increase Kenyan ownership and management of the industry; reduce any undesirable social or environmental consequences; and conserve, protect and improve environment and wildlife (Kenya, 1965a)". Several institutional policy measures were taken towards this direction. They include:

Establishment of the Kenya Tourist Development Corporation (KTDC)

Kenya's independent government in 1965 established the Kenya Tourist Development Corporation, a semi-autonomous body within the Ministry of Information and Tourism. The main objectives of KTDC are: to provide finance and technical support to potential investors in different sections of the tourism industry with emphasis on small and medium sized hotel and accomodation establishments; to closely monitor the operation of hotels, lodges and other forms of accommodation and to advise them on the required standards; to investigate, formulate and carry out projects for the promotion or expansion of new or existing enterprises in the tourism industry by means such as loans, equity holdings and purchases of property; to widen the scope in enterprise development in tourism; to ensure government direct participation in commercial investments in the tourism industry; and to act as the executive agency in tourism for the state's indigenization policies as spelled out in Sessional Paper N°. 1 of 1965 under the brand name "African Socialism" (Kenya, 1965b). It also provided the same services to passengers by facilitating accommodation within the country and conducting overseas promotion and marketing activities.

The KTDC was directly involved in the development of new tourist areas by providing new accommodation through its subsidiary company, African Tours and Hotels (ATH). Over time, the KTDC, apart from developing its own hotels and lodges such as the Meru Mulika Lodge in Meru National Park, the Mt. Elgon Lodge and Homabay Hotel in Western Kenya and the Sunset Hotel in Kisumu, also acquired substantial equity holdings in some of Kenya's most prestigious hotels and lodges, including the Nairobi Hilton, Intercontinental Hotel and the Nairobi Serena. The KTDC has also played an active role in the provision of loans to Kenyans for investment in small-scale hotel and lodging facilities, tour operating and transport firms and

curio shops, and also provided support for cultural ventures such as the Bomas of Kenya.

At the same time, the KTDC played a key role in marketing and promoting Kenya as a tourism destination in major tourism markets. Overseas promotion activities included the distribution of brochures and information through promotion offices abroad and participation in international trade fairs. The KTDC established tourism promotion offices in Kenya's main tourism generating countries and posted staff there. The success of the marketing strategy became evident in the late 1980s when tourism became the fastest growing sector of the national economy and the largest single source of foreign exchange earnings for the country.

In recent years, however, the KTDC's entrepreneurial ventures have met with mixed success. Most of its projects, particularly in the hotel industry, have faced serious cash flow problems. Consequently, many of the hotels, especially those considered unprofitable, were sold off. Most of KTDC's problems result not so much from efficiency or lack of it but from the government's policy of trying to turn the whole country into a tourist resort. The government's policy of "bringing the benefits of tourism to hitherto neglected areas" forced KTDC to invest in projects dictated by socio-political exigencies rather than commercial good sense. Some of the projects for which the state bore the entire burden were in zones that had little or no interest for tourists.

Establishment of the Utalii College

The Kenya Utalii Hotel Management and Training College (commonly referred to as Utalii College, utalii being the Swahili word for tourism) was established in 1975 to train personnel for the various sectors of the tourism industry. The college is funded by a 20 per cent gross income on hotels and restaurants, and is administered by the Catering Levy Trustees (Jommo, 1987; Sindiga, 1996).

Since its inception, significant progress in human resources development for tourism services, especially in catering and hotel operation, has been made. Besides full-time courses, the college also offers in-service course for people already working in the industry. The college owns the Utalii hotel, which is largely operated by students on practical training. The college also admits students from east, and sometimes, central Africa.

Establishment of the Kenya Wildlife Services (KWS)

The Kenya Wildlife Services (KWS), a semi-autonomous body, was formed in 1990 to tackle the problem of poaching in and mismanagement of national parks and reserves. Prior to that, wildlife was protected and managed by the Wildlife Conservation and Management Department (WC&MD) in the Ministry of Tourism and Wildlife, as was spelt out in Sessional Paper No.3 of 1976.

The objectives of KWS, are among others: to build partnerships to conserve biodiversity and to ensure the custodian's benefit, to take a lead role in developing sustainable nature tourism while maximizing the economic benefit to the nation and minimizing its negative effects; and, to establish and maintain planned and permanent faunal sanctuaries in order to boost tourism (KWS, 1990). KWS is today the sole organization responsible for the protection, conservation and promotion of wildlife tourism, which is also expected to generate revenue for the government and local people.

Establishment of the Kenya Tourist Board (KTB)

After the depressed market conditions that resulted in fewer arrivals in the early 1990s, the government was compelled to undertake certain institutional and policy measures to stimulate growth in tourism arrivals. In order to implement the new policy of tourism development, new institutions such as the KTB and the Tourist Police unit were established under legislation that was enacted in 1996.

The KTB was appointed as the country's national organization responsible for international marketing activities for tourism, detaching the role from the Ministry of Tourism. Its operational fund is allocated from the government's annual budget, but basically it relies heavily on fund from donors and private sector contributions. It has continued its activities up to the present and now includes tourist market promotion, supervision and the coordination of private sector tourism development, infrastructure development in tourist locations.

KTB has, since its inception made a strong presence in international trade fairs both in traditional markets and in new ones such as Japan. KTB has only promoted Kenya tourism abroad but also, has tried to restore confidence among tourists that Kenya is a safe and stable country. The new

policy seems to be bearing fruit as hotels and other tourist enterprises have reported improved business, particularly in the first half of 2001.

Tourism Development Planning in Kenya

Tourism Master Plan

The government adopted a tourism master plan in 1994 with the assistance of the Japan International Development Agency (JICA) through funding from the government of Japan. This master plan included field surveys, a long-term development plan, a five-year strategic plan, and prefeasibility studies for prioritized development. The plan stated that the tourism sector in Kenya was expected to expand, however, there was a need to ensure sustainable development. Therefore, the possibility of tourism expansion through the utilization of various tourism resources was mentioned in the plan. The recommended strategy for tourism development had as objective to: (a) diversify tourism demand; (b) increase tourism spending by developing new tourism products; (c) put increased emphasis on cultural, natural, and other tourism attractions; and (d) create a positive image for Kenya as being an ideal tourist destination; (e) upgrade tourism facilities and travel conditions. It also states that if the recommended strategy is implemented through careful planning and approaches, it would maximize the economic impact of tourism and minimize its negative impacts on the environment and culture.

Tourism Development Regions

The tourism master plan designated eight tourism development regions throughout the country and defined major development projects in these regions. These were: (a) provision of tourism facilities for both international and domestic tourists; (b) improvement of accessibility to all the tourism regions (c) zoning for tourism development (d) incentives to investors and local communities (f) diversification of tourist attractions through the development of major tourism resources- cultural, historical, and natural- and development of related small-scale tourist attractions; (g) organization of a tourism corridor with new routes linking up the eight tourism development regions and improvement of existing ones; (h) conservation of the environmental and cultural heritage. It placed greater emphasis on the

utilization of the private sector investment, particularly for existing facilities, and recommended the setting up of a committee which would decide priorities for tourism development implementation.

Tourism Marketing Strategy

The tourism marketing strategy first pointed out existing constraints, which included: (a) widespread civil unrest (b) negative publicity by the foreign media regarding infrastructural shortfalls, insecurity, escalating crime rates, the AIDS pandemic and human rights abuses (c) limited tourism products (d) lack of quality improvements in tourist facilities (e) lack of direction for sustainable tourism development (f) lack of concern on the social aspects of tourism development. Overall marketing strategies were formulated in the light of the above constraints. Three major strategies were drawn up: (a) building the perception, in the marketing countries, that Kenya is a safe tourism destination (b) emphasizing its multi-varied attractions and (c) emphasizing its tourism policy, which deals with sustainable development and impacts on social, cultural, and environmental aspects. The objectives of the domestic tourism marketing strategy include: (a) giving incentives to local travelers such as discount fares; (b) encouraging the youth to travel (c) granting leave to employees, at least once a year.

Promotion Programme

The promotion programme was designed to cover the objectives of the first five-year marketing strategy. Existing problems in the promotion programme were listed, and these included: inappropriate staffing, lack of funds, and lack of research in target countries. It was suggested that market research should be conducted immediately, especially among major target countries such as France, Germany, UK, Italy, Japan and USA. Recommendations were made calling for the creation of a tourist market and development of a coherent image of the country through government-private sector cooperation, while clearly separating the role of each.

Tourism Development Problems in Kenya

This section discusses the tourism development problems in Kenya, which were noted in the previous sections. Although the tourism master plan is

now under implementation, there still remains a great disparity in accommodation distribution among the designated tourism regions, with over concentration in Nairobi and Mombasa. Moreover, continuing civil unrest inhibits tourist arrivals in the Rift Valley region, and also delays the development of tourist facilities in the region.

International tourism is becoming more large scale and diverse than ever, and provides tourists with increasingly and wider choices in destinations. It may not be easy for Kenya to establish its own identity as an outstanding tourism destination, hence there is need to create specific tourism characteristics and undertake appropriate promotion activities in the tourism market. Although Kenya serves mainly as a nature, (wildlife viewing) and beach resort destination, its reputation has not equaled that of some African destinations such as South Africa, which offer beautiful national parks. In terms of historical ruins, Kenya cannot compete with Egypt, which has a large national land area and is famous for innumerable historical sites. Nevertheless, the tourism industry contributes greatly to the nation's economy. So, effective tourism development measures should be taken for further national development. Therefore, recommendations for tourism development related to major issues in Kenya may be listed as follows.

Domestic Problems

Although it has been mentioned previously, the occurrence of ethnic conflicts in certain parts of the country particularly in the Rift Valley Province, and regular riots in the towns, particularly in the Capital city of Nairobi, directly affect the number of tourist arrivals. In order to increase the number of tourists and utilize the tourism resources available in the country, a peaceful settlement of the ongoing constitutional stalemate is essential, particularly, since the climate differs on the Western, Central and coastal regions, it should be possible to promote all year round tourism if the domestic security situation is resolved.

Tourism development policy

Kenya has attracted tourists because of its natural environment, coastal beaches and cultural heritage. However, the addition of new concepts for tourism such as eco-tourism and rural tourism are recommended. It is possible to conduct safari tours in the national parks and sanctuaries with

well trained guides or rangers; such tours could also include environmental awareness education. In the rural areas, settlement of rural resorts including farming experience and cultural exchange may attract other types of tourists. Moreover, well-planned transportation especially roads and railroads, would make Kenya a place where tourists can travel easily from one site to another and experience various types of attractions. It may only be possible in Kenya, since the national land is relatively small compared to other countries in the region especially Tanzania, Sudan and Ethiopia. These new types of tourism development can be implemented with the experience and know-how gained in other countries. Therefore, training for tourism personnel on specialized tourism development, organized by international agencies, private institutions, and universities, is strongly recommended: this initiative could be taken by governmental bodies such as the KTB.

Market promotion

Nairobi used to serve as a vital transit point during the colonial period for people traveling to central Africa- a role that has now been taken over by direct flights to specific countries. However, Nairobi still serves as a transit point for tourists, especially those heading for Tanzania, Uganda and Zanzibar from Europe. It may be possible to provide a city tour or urban tourist attractions especially designed for transit passengers, and promote travel agencies abroad to include a short Nairobi visit as part of their package either on their way to, or from, a destination. It will certainly require the city to be adequately equipped with tourist facilities such as shopping centers, restaurants, cultural attractions, and fitness or sports facilities as well as convenient means of transport within the city.

CONCLUSION

The paper has attempted to examine the tourism problems and perspectives in developing countries, by focusing on conditions in Kenya. Findings include several areas which may be expanded and applied to other countries under development such as: (a) adoption of sustainable tourism development policy; (b) characterization of the country as differing from others, especially those in the same region; (c) adoption of new tourism concepts; (d) establishment of a tourism master plan at the national

level; (e) implementation and revision of existing tourism development plans; (f) continuous monitoring of international tourism trends; (g) continuous data collection of tourist profiles and other relevant aspects of the tourism sector.

Kenya has been collecting data and has established a tourism master plan, which gives it a solid base for considering further tourism development. Many developing countries suffer from a paucity of data and essential information for tourism development. Therefore, before planning tourism development in developing countries, provision of the necessary data and information materials is strongly recommended.

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Table 1: International Tourist arrivals and receipts 1985-1994

Arrivals 000s, receipts in US\$ and percentages

	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994
Arrivals (thousands)	541	604	661	695	735	814	805	782	826	832
Annual %change	17.10	11.65	9.44	5.14	5.76	10.75	-1.11	-2.86	5.63	0.73
Receipts (millions US\$)	249	313	354	394	420	466	432	442	413	451
Annual%change	18.6	25.7	13.1	11.3	6.6	11.0	-7.3	2.3	-6.6	9.2

Source: World Tourism organization (WTO) 1995 rounded figures

Table 2. Kenya International visitor arrivals by country of residence: selected years 1984-1997

Country	1984	1986	1988	1991	1993	1995	1997
Total Europe	198500	354500	403400	456173	545303	390800	566283
Italy	20400	38100	43600	41605	48027	52254	53704
West Germany	60500	111700	121500	123985	150455	153266	157516
UK	42600	73100	89700	138346	160695	148952	153082
Switzerland	25600	49500	43600	28987	36779	38295	39357
France	15300	27200	34200	38858	45906	46840	48139
Scandinavia	10100	15100	16.7	-	-	-	-
Other Europe	24000	39800	44000	1269	1415	1438	1477
Total America	39700	68900	79200	68762	82001	82865	85161
U.S.A	34300	60400	69500	53491	63234	63887	65658
Canada	5400	8500	9700	14576	18027	18217	18722
Other America	-	-	-	695	740	791	781
Total Africa	88100	127500	132700	223063	315576	265318	272674
Uganda	18400	27800	28900	57502	67685	68385	70281
Tanzania	24400	24800	25900	92064	108366	109500	122536
Zambia	7700	9700	10100	7620	8892	8982	9231
Other Africa	37600	65200	67800	65877	77616	78452	80627
Total Asia	25100	44100	50800	55859	64872	46500	67382
Japan	4900	8500	9800	12590	14860	15016	15433
India	6700	10900	12600	17266	23141	23378	24026
Israel	1900	4200	5000	5938	7115	7191	7389
Other Asia	11600	20500	23400	20065	19756	19980	20534
Australia and New Zealand	3500	4200	5400	7053	8034	8122	8346
Other world	3600	4800	5400	703	729	733	753
Totals	358500	604000	676900	804600	963500	973614	1000600

Source: Central Bureau of statistics and Ministry of Tourism and wildlife various years.

Note: The World Tourism Organization figures do not tally with those of the government, perhaps because government figures are either deflated or inflated

Table 3. Visitor expenditures in Kenya 1986-1990

	1986	1990
Accommodation	26.6	23.1
Shopping	27.4	39.0
Food and drink	16.9	15.1
Entertainment	10.1	7.6
Local Transport	15.6	13.3
Others	3.4	1.9
Totals	100.0	100.0

Source: Central Bureau of Statistics, various years

Figure 1.1 Tourism Regions and Areas

