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RESEARCH NOTE

TOURISM IN KENYA: A PRELIMINARY EXAMINATION

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This study seeks to explore the trends in international tourist arrivals in a developing country—Kenya—which has been well recognized as an international tourist destination in Sub-Saharan Africa. Kenya's tourism sector has undergone several challenges over the years. Several factors that affect the tourists' propensity to stay longer in a destination are discussed and suggestions for marketing are proposed.

Key words: Tourism; Kenya; Sub-Saharan Africa; Marketing

Introduction

Kenya is located on the East Coast of Africa, with the equator running almost straight through the middle of the country. Kenya achieved its independence from Great Britain in 1963. Since independence, the country has been under a parliamentary democracy; first, under a single party system and then, from 1992, under a multiparty system. Its economic growth has been guided by capitalistic ideals with a lot of support from the Western countries. Uninterrupted political stability and a pragmatic economic approach have enabled the country to develop the most sophisticated physical, financial, and industrial structure in the East Africa region. Kenya has a great diversity of physical features, including the second highest (snow-capped) mountain in Africa, Mt. Kenya, which rises to 5199 meters (17,058 feet). Kenya also boasts of two inland seas: Lake Victoria (the second largest fresh water lake in the world) and Lake Turkana. Other features include the Great Rift Valley and the open savannah grasslands teeming with wildlife.

Nairobi, Kenya's capital, has over the years grown in size and importance, serving as the region's main commercial center and the hub for international airlines in East and Central Africa. It is also the headquarters for important international organizations, such as the United Nations Environment Program (UNEP) and United Nations Center for Human Settlements (HABITAT), and serves as a regional headquarters for several international financial and private organizations. Kenya has only two distinct climatic seasons: the wet season (April–May and October–November) and the dry season (the rest of the year). Temperatures in Kenya

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are governed by the altitude of a given region, and range from 11°C in the central highlands, to 33°C at the coast and up to 47°C in the North. All these factors have for a long time been Kenya's greatest tourist assets.

Tourism Development in Kenya

In 1966, when the Kenya government realized the potential that there was in developing tourism, it established the Ministry of Tourism and Wildlife to manage these activities. The late 1960s and 1970s saw the formation of several government-owned institutions, founded to manage different aspects of tourism in the country. By the 1970's Kenya had become a popular tourism destination, because of the increased promotional activity and the advent of the charter flight. Recent developments in the tourism industry in Kenya included the commissioning of a team to come up with a tourism master plan in 1994, the government's divestment in tourism businesses in 1995, and the formation of a tourism board in 1996. Kenya has recorded an increase in the number of tourist arrivals over the years. The total number of visitors increased from 540,000 in 1985 to 690,000 in 1995. This represents an increase of 27% in 10 years. There was, however, a decline in the number of visitor arrivals of 4% between 1990 and 1992. After an increase in arrivals in 1993 and 1994 there was another downturn from 863,000 in 1994 to 690,000 in 1995, a decline of approximately 20%. Earnings from tourism also decreased from K$1,405 million (Kenya pounds) in 1994 to K$1250 million in 1995 (Republic of Kenya, various years).

The Kenya government attributes the declines in arrivals in 1991, 1992, and more recently 1995 to adverse publicity in the international media, ineffective tourism promotion, overreliance upon limited tourist attractions, and competition from similar markets, like South Africa and Zimbabwe. This decline in the number of arrivals is reflected in Kenya's loss of market share of overseas visitors to Africa, which has dropped from 6.0% in 1990 to 4.7% in 1994 (WTO, various years). Meanwhile, the percentage of market share for South Africa increased from 6.8% to 20% and for Zimbabwe from 4% to 6% in 1990 and 1994, respectively. With 1,099,000 arrivals, Zimbabwe had the most tourist arrivals in the Eastern Africa region compared to Kenya's 863,000 arrivals. However, Kenya had the highest receipts from tourism (US$421 million) during that year. For a long time, Kenya had the highest number of arrivals in the region, until 1992 when Zimbabwe replaced it.

Holiday visitors have for a long time constituted the largest group of international travelers to Kenya, making up more than 50% of the total number of visitors. The percentage of business travelers has fluctuated in the recent past. Out of the total number of visitors who came to Kenya in 1995, approximately 77% were holidaymakers, while 14% were business travelers and 9% came for other purposes. This trend continued in 1996. An analysis of the arrival figures by region in 1996 highlights Kenya's reliance on a single region (Europe) as a source market for tourism. Europe represented 54.4% of the total arrivals followed by Africa (29.1%), America (8.3%), Asia (6.2%), and the rest of the world (0.7%). Tourism earnings increased from K$713 million in 1992 to K$1405 million in 1994 followed by an 11% drop in earnings in 1995 and a 2.4% increase in 1996.

Tourism Management Structure in Kenya

The Ministry of Tourism and Wildlife is responsible for the overall management and policy formulation for the tourism sector assisted by four government-owned institutions, each charged with managing a specific aspect of the tourism sector. These are the Kenya Tourism Development Corporation, Kenya Utali College, Kenya Wildlife Service, and the Tourism Board. There are several tourism associations/organizations that represent tourism firms in the private sector, and that act as a liaison with the government in promotional and developmental matters. These included the Kenya Association of Travel Agents (KATA), the Kenya Association of Tour Operators (KATO), and the Kenya Association of Hotelkeepers and Caterers (KAHC). However, according to the structure, there seems to be lack of a tourism marketing body spearheading a concerted effort by both the government and the private sector in marketing Kenya as a tourism destination.

How Long do International Tourists Stay in the Country?

Length of stay is of utmost importance in examining the travel patterns of international tourists (Masberg, 1998). The importance and seasonal variation of length of vacation stay in 48 states in the US has been clearly established in previous research (Uysal, Fesenmaier, & O'Leary, 1994). Getz (1986) defines tourist length of stay as the amount of time travelers spend at a destination and is frequently measured in the number of nights one spends at the site (Pearce & Elliott, 1983; Uysal, McDonald, & O'Leary 1988). During the 1990s the length of stay of international tourists in Kenya declined from a high of 5,581 million nights to a mere 687 million nights. The average number of nights per tourist also dropped from 13.70 nights in 1991 to 9.60 nights in 1998. Although a slightly higher number of tourists arrived in Kenya in 1998 compared with the 1991 figure, receipts were significantly lower in 1998 compared with that of 1991. The decline in the number of nights was due to the drop in the both intraregional and interregional arrivals, as shown in Table 1. Arrivals from all regions showed significant drop in 1998 over the 1995 figures with the exception of Japan, India, the Middle East, North Africa, and Southern Africa, which showed slight improvements over the 1995 arrivals.

Not only has Kenya been losing in terms of tourist nights, but also in terms of receipts per arrivals. The 1999 figures for select East African tourist destination countries show that Kenya's per capita receipt was well below that of Tanzania, Uganda, Mauritius, Seychelles, Comoros, etc., and its per capita earning was slightly higher than that of Ethiopia, Malawi, Zambia, and Zimbabwe (Table 2).

Marketing Implications and Conclusion

Destinations are amalgams of individually produced tourism amenities and services (accommodation, transportation, catering, entertainment, etc.) and a wide range of public goods (such as landscape, scenery, sea, lakes, sociocultural surroundings, atmosphere, etc.) that are branded together under the name of the destination—the concept of which evokes an image of that destination (Bu-

Table 1
Tourists From Abroad in Hotels and Similar Establishments (by Residence)

	1995	1998
Interregional	**4,099,000**	**1,914,500**
United Kingdom	964,600	516,300
Germany	1,201,400	418,800
United States	265,900	185,100
Switzerland	312,000	129,800
Italy	305,700	126,500
France	310,100	123,300
Scandinavia	86,300	54,100
Japan	33,400	33,500[a]
India	27,800	29,600[a]
Australia, New Zealand	25,100	21,800
Canada	51,600	18,300
Other Americas	15,000	13,400
All Middle East	29,600	48,400[a]
Other Asia	25,500	17,800
Other Europe	289,000	145,600
Other world countries	136,000	32,200
Intraregional	**266,500**	**201,600**
Tanzania	40,600	35,100
Uganda	30,800	26,400
North Africa	12,000	13,000[a]
Southern Africa	28,200	36,800[a]
West Africa	28,200	13,500
Other Africa	131,800	76,800

Source: WTO (2001).
[a]Increase in arrival numbers.

Table 2
Arrivals, Receipts, and Receipts per Arrival 1999

Country	Arrivals ('000)	Receipts (US$ million)	Receipt per Arrival (US$)
Kenya	**943**	**304**	**322**
Tanzania	564	733	1,300
Uganda	142	149	1,049
Mauritius	578	545	943
Seychelles	125	112	896
Comoros	24	19	792
Eritrea	57	28	491
Ethiopia	92	16	174
Madagascar	138	100	725
Malawi	254	20	79
Reunion	394	270	685
Zambia	456	85	186
Zimbabwe	2,103	202	96

Source: WTO (2001).

halis, 1999). Market segmentation has become a critical element of positioning tourist destinations by dividing a visitor market group into homogenous subgroups (Mykletun, Crotts, & Mykletun, 2001). Kenya needs to pay attention to a number of factors that play critical roles in its endeavor to continue attracting increasing number of international tourists. These include:

a) Partnerships between public and private sectors for promotion of existing tourist attractions and development of new products;
b) Regional tourism and cooperation between Kenya and neighboring countries, a good example of which includes Mozambique, Zanzibar, and Uganda, which are getting increased exposure in tour operators' brochures and benefiting from multidestination holidays;
c) Developing a new branding of its products in order to improve its share of global tourist arrivals;
d) Facilitation of travel across its boundaries;
e) Establishing quality and standards control policy;
f) Ensuring security and safety of tourists;
g) Dealing effectively with negative events to limit their impact (e.g., effect of the bombings of the US embassy in Nairobi);
h) Addressing health issues, particularly HIV because it could impact tourism flows;
i) Paying attention to "ecotourism" that could steer tourists away from the "beach and safari" packages, which have led to environmental damage, and overcrowding in some areas.

It is important to highlight the WTO tourism 2020 vision in regards to Kenya. The future for East Africa may lie in promoting the area as a regional destination, as it was in the late sixties. Consequently, tour wholesalers could promote two-nation vacations, linking Kenya with Uganda or the Seychelles" (WTO, 2000a, p. 25). Areas that appear promising for the effective and sustainable development of the tourism sector in Kenya include fostering domestic tourism, community initiatives, industry funding, wildlife management, and the formation of diversified, multilateral tourism circuits (Dieke, 2001, p. 103). Particular emphasis should be given to the establishment of cooperative marketing strategies within the subregion, which requires the cooperation of the tourism industry, the government, and the international community (Frost & Shanka, 2001a, 2001b). In conclusion, there are several issues that should be considered. The development of intraregional and interregional tourism has hitherto been hampered by lack of free flow of tourists across the national borders. This free flow of tourists within the region can contribute significantly to the growth of tourism. Kenya can no longer rely on its sunshine, beautiful beaches, fauna and flora. The country's tourism marketers must be proactive in addressing issues that matter for the tourist of the 21st century.

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