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### Tourism product development and the changing consumer demand: A case study of Kenya

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## TOURISM PRODUCT DEVELOPMENT AND THE CHANGING CONSUMER DEMAND: A CASE STUDY OF KENYA

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*Kenya is an important tourist destination in Africa accounting for over 6% of the total international tourist arrivals to the continent. However, in recent years Kenya's tourism industry has been experiencing problems of poor performance and continuing decline in the number of international tourist arrivals. This study examines the main characteristics of the country's tourism product vis-à-vis the changing trends in global tourism market demands. It is argued that the underlying cause of the recent poor performance of the tourism industry relates to the nature of the country's tourism product. Over the years, Kenya has been offering a limited tourism product that is based on beach and wildlife tourism. Also, the marketing of Kenya mainly depends on overseas tour operators who mainly sell inclusive tour packages. Thus, the form of tourism product that is offered by Kenya has not responded to the recent changes and trends in international tourism market demands. Post-modern tourists, particularly tourists from developed countries, are increasingly becoming aware of the negative impacts of mass tourism and are increasingly looking for alternative tourism products that provide a deeper and more meaningful experience. Thus, if Kenya is to rejuvenate its tourism industry there is need for the country to provide a diverse alternative tourism product which is more appealing to the post-modern tourists.*

**Key Words:** Mass Tourism, Differentiated Tourism Product, Undifferentiated tourism Product, Tourism Development in Kenya, Third World Tourism, and Post-modern

### INTRODUCTION

The initial development of Kenya as a tourist destination started at the turn of the 20<sup>th</sup> century. In that initial period, tourism in Kenya was mainly an activity undertaken by affluent individuals such as members of the aristocracy and top government administrators from the Western world. Thus, between 1900 and 1940, the development of tourism in Kenya was characterized by individualized forms of travel by affluent visitors from Western countries, and was mainly based on 'Big Game' safari hunting in search of prized game trophies. Furthermore, the social status attached to big game hunting as a symbol of one's position in society made Kenya a popular safari hunting destination, particularly amongst travelers from Europe and North America (Jommo, 1987). Consequently, wildlife based tourism eventually developed into a distinct tourism product that was mainly driven by the Western world travelers' needs; activities that were mainly based on wildlife viewing and big game hunting in the country's game parks and reserves.

Thus, it is important to note that the increasing demand for wildlife safari hunting laid the foundation of the development of organized tourism, and it also led to the creation of wildlife protected parks in Kenya such as Nairobi in 1946, Amboseli in 1947, Tsavo in 1948 and Mount Kenya in 1949 (Jommo, 1987). Furthermore,

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legislation was formulated to protect wildlife; which also included the preservation of geologic, prehistoric, historic and archaeological heritage in the protected areas. In order to promote the development of organized tourism in the protected areas, the government in collaboration with private sector initiatives established the East Africa Travel and Tourism Association (EATTA) (a quasi-governmental organisation) in 1948. The Association was mandated to co-ordinate the development and promotion of organised tourism (Ouma 1982).

Thus, wildlife continued to be depended upon as a single tourism product until the early 1970s when there occurred a shift to beach-based tourism (Sindiga, 1995). The shift was as a result of government policy initiatives to attract foreign capital investment in tourism through financial incentives such as tax concessions, favourable fiscal policies for capital investment and profit repatriation (Sinclair 1990). Consequently, small-scale public and private tourism enterprises came to be complimented by multinational tourism companies. Between 1970 and 1980, for instance, there was increased development of tourism and hospitality facilities in the Kenyan coast; over 10,000 hotel-beds in 500 hotels was added to the existing tourism establishments (Sinclair 1990). This development marked a turning point in which beach tourism increased its prominence as an additional tourism product, besides wildlife viewing and photographing. Since then, beach tourism has retained its leading position attracting over 60 per cent of international tourist arrivals to Kenya.

However in recent years, particularly in the 1990s, there has been a slump in the number of international tourists travelling to Kenya. As a consequence, the total

hotel bed-nights occupancy for the whole country has been relatively low; around 5 million against total available hotel bed nights of a bout 12 million. The decline in hotel bed-nights occupancy started in the early 1990s and has continued to the present. Furthermore, there has been a decline in the number of tourists going to national parks and reserves.

The current decline and poor performance of Kenya's tourism industry has to be examined from global perspective. Tourism developers in Kenya have, over the years, placed emphasis on the development of single product elements without much consideration of the changing global tourism market demands. This form of tourism development is manifested by the domineering role of wildlife and the beach as the country's main tourist attractions. Thus, despite immense and diverse potential for the development of diverse forms of tourism in different parts of the country, most of the tourism and hospitality facilities have mainly been developed in limited areas, particularly along the Kenyan coast and in a few inland wildlife parks and reserves.

From a global perspective, it may be argued that the different and diverse ways in which people choose to travel in the postmodern era is not only occasioned by the availability of free time and higher degree of participation, but it is also as a result of changing consumer preferences. For instance, the emergence of holiday camps and inclusive tour packages after World War II is characteristic of the development of mass tourism; where there is mass marketing to undifferentiated clientele and the holiday is consumed en mass with little regard by tourists of unique environments and culture (Poon 1993). However, in the

last three decades, changes have been observed as regards to the way and experiences that people seek in their individual travel (MacCannel 1976, Cohen 1979, Urry 1990).

Thus in recent years more and more people are, particularly, interested in culture and other forms of consumption that differ from contrived forms of tourist experiences that are being marketed by tour operators and travel agents (Urry, 1990; Richards 1996; Elands and Lengkeek 1997). Consequently an increasing number of tourists are moving away from conventional mass tourism and are now demanding more individualized forms of travel, and unique tourist products and services.

### THE DECLINE OF KENYA'S TOURISM INDUSTRY

Particularly from the mid 1990s Kenya's tourism industry has been experiencing unprecedented decline. In the country's major tourism areas, particularly in the Coast, Nairobi and the popular game parks and reserves there has been persistent low bed occupancy of less than 50% in the last couple of years (Kenya Government, 1999) (Table 1 and 2). It has been noted that due to the problem of low bed occupancy most hotels and lodges in the country have been offering rock bottom prices in order for them to balance their books and break-even (Sindiga, 1996, 1999; Kenya Government 1995, 1999). Hotel and lodge facilities which, for instance, normally charge between Kenya Shillings 3000 to 4,700 per person per day full board, currently offer concessionary rates of less than half the normal prices, especially during the low season, which lasts from April to July (Sindiga, 1999).

**Table 1. Tourist traveling for holiday between 1994-1998**

1994	1995	1996	1997	1998
823,600	795,700	820,800	804,800	686,900

Source: Kenya, economic survey 1999, Central Bureau of Statistics

**Table 2. Hotel bed-nights occupied by zone, 1993-1997 (in thousands)**

ZONE	1993	1994	1995	1996	1997
Coastal-beach	3,762.0	3,071.5	3,059.6	3,144.9	3,074.4
Other	196.2	185.2	166.7	70.9	71.5
Coast Hinterland	146.2	133.2	120.3	114.2	59.0
Nairobi-high class	649.9	550.7	613.7	774.1	801.5
Other	499.0	454.7	413.8	313.0	311.8
Central	369.0	299.0	275.4	253.4	218.1
Masailand	372.7	247.8	245.3	237.1	215.0
Nyanza basin	105.6	82.8	78.6	114.3	88.2
Western	79.9	69.9	65.5	33.0	64.3
Northern	8.3	15.2	15.9	6.3	6.5
Total- occupied	6,188.8	5,110.0	5,054.8	5,061.2	4,910.3
Total -available	11,908.9	11,908.9	11,562.2	11,354.5	9,516.6

Source; Kenya economic survey 1998

However despite recent price adjustments aimed at attracting more visitors, there has been a downwards spiral in the number of international tourist arrivals to Kenya. The coastal region (which usually receives over 60% of Kenya's international tourist arrivals) has been the worst hit. In the last 4 consecutive years, even during the peak season at the coast (December to April) there has been a major decline of over 50%, from over 300,000 international tourist arrivals in the early 1990s to less than 150,000 arrivals in the late 1990s (Kwena, 1997; Kenya Government, 1999). The poor performance of coastal

tourism has had a spiral negative impact on other tourism related sub-sectors, including handicraft, car rental, sports-fishing, boating, construction and retail (Sindiga, 1999). Consequently, thousands of workers in the tourism sector have been laid off. Similar trends have also been observed in most of Kenya's tourism centers (Table 3). It can therefore be argued that the underlying cause of the decline of the tourism industry relates to the nature of the country's tourism product; the presumed reduction of the quality of the tourism product and; the emerging perception of Kenya as an insecure tourist destination.

Table 3. Number of visitors to parks and game reserves, 1993-1998 (in thousands)

	1993	1994	1995	1996	1997	1998
Nairobi	164.6	163.3	113.5	158.3	149.6	122.3
Animal Orphanage	155.3	182.0	212.1	210.6	193.7	164.8
Amboseli	121.1	159.5	114.8	109.1	117.2	62.9
Tsavö west	102.9	105.4	93.1	93.6	88.6	54.9
Tsavö East	135.8	132.4	228.8	137.5	123.2	66.9
Aberdare	60.8	60.2	70.1	60.2	59.0	47.9
Lake Nakuru	178.6	164.3	166.8	156.9	132.1	111.0
Masai Mara	133.1	138.2	133.2	130.3	118.3	100.4
Bamburi nature park	93.2	98.9	109.2	107.0	86.8	77.9
Malindi marine	41.1	39.4	38.8	39.3	27.0	13.7
Lake Bogoria	37.2	43.2	14.2	12.2	24.5	20.6
Meru	7.4	7.9	7.3	7.8	4.1	1.8
Shimba Hills	24.8	31.6	20.0	23.4	22.5	16.8
Mount Kenya	18.0	17.2	17.2	17.1	14.8	10.2
Samburu	21.5	9.2	9.1	9.1	8.3	7.0
Kisite/ Mpunguti	27.5	34.8	32.4	39.9	35.1	29.2
Mombasa marine	43.3	48.0	23.9	21.7	15.2	16.2
Watamu marine	31.7	32.1	16.1	20.2	19.4	18.3
Hells Gate	47.4	44.9	50.1	52.1	47.2	57.1
Impala Sanctuary	59.1	5.5	3.5	65.6	62.4	65.6
Other**	16.6	9.6	18.9	14.8	15.5	13.9
<b>Total</b>	<b>1,521.0</b>	<b>1,527.5</b>	<b>1,493.1</b>	<b>1,488.7</b>	<b>1,364.5</b>	<b>1,079.4</b>

\*\* Other Includes Mount Elgon, ol-Donyo Sabuk, Marsabit, Saiwa Swamp, Sibiloi, Ruma National park, Mwea National reserve, Central Island National park, Nasolot national park Reserve and Kakamega national reserve.

Source: Kenya Economic Survey 2000

#### Recent Trends in Global Tourism Market Demands.

In order to critically evaluate the underlying causes of the recent poor performance of Kenya's tourism industry, it is important to put in perspective the nature of the tourism product offered by Kenya vis-à-vis the changing global tourism market demands. In this regard, it can be argued that, in recent years, there has been a 'mismatch' between the nature of the Kenyan tourism product and the existing global market demands. Over the years, Kenya has been offering an undifferentiated and limited tourism product that is based on beach and wildlife tourism. However, the manner in which people chose holidays, particularly between 1945 to the early 1970s is quite different to that of the period between the 1980s to the present. In the Post

World War II period, society particularly in Europe and North America, cherished massive industrialization, rapid economic expansion, and mass production and consumption of goods and services (Cohen, 1979; Urry, 1990). Thus, the Post World War II period has been characterized by increased technological advancement, particularly the mass production and consumption of goods. In the case of tourism development, production and consumption has been represented by tour packages whose main features include large scale production and provision of standardized services, inflexible packaging of tours, mass replication and marketing of products to undifferentiated clientele, and mass consumption of holidays with little regard about place or culture (Poon 1993 p. 32).

Consequently, the rapid expansion of tourism in Kenya, as is the case with many other Third World tourism destinations, especially in the 1960s and the 1970s was very much in line with the global trends in the development of tourism. Furthermore, during the 1960s the Kenya government undertook specific policy initiatives to promote rapid expansion of tourism. The initiatives included the initiation of a tourism 'Master Plan', whose aim was to attract increased foreign capital investment through financial incentives such as tax concessions, favorable fiscal policies for capital investment, and profit repatriation (Bachmann, 1988; Sinclair, 1990). As a consequence of government policy initiatives coupled with global trends in international tourism development, the structure and characteristics of tourism development in Kenya shifted from small-scale public and private enterprises to the establishment of large scale-tourism projects that were mainly financed by external multinational investors. Thus, for instance from the early 1970s there was rapid development of tourism and hospitality facilities in the Kenyan coast; within a period of 10 years, about 10,000 hotel beds in about 500 hotels were added to existing coastal hotel establishments (Sinclair, 1990).

Furthermore, improvement in international flight scheduling, air-ticket price adjustments and increased levels of disposable income made it possible for an increasing number of people, particularly in Europe and North America to travel to far-off tourist destinations. In addition, the introduction by professional tour and travel companies of organized tour packages helped reduce costs of international travel and also minimized the risks and uncertainties associated with individualized private travel arrangements, especially when traveling to far-off destinations.

Within this international context, the Kenya Government and multinational investors mainly promoted the development of large -scale tourism and hospitality projects such as beach resorts, high-rise hotels, lodges and restaurants which offered undifferentiated services. The following quotation captures the essence and nature of undifferentiated tourist services in Kenya:

The ground operation of the country's tourism industry reflects (this) outward-orientation. Typically a tour operator sends a micro-bus to the airport to collect tourists. Such visitors may be in an inclusive package tour already paid for overseas. The tour firms, for example, Abercombie and Kent, United Tour Company, Kuoni Worldwide, Thomas Cook, and Hayes and Jarvis, would likely be foreign owned, or a subsidiary of a foreign company. The firm takes the tourists to an assigned hotel in Nairobi or Mombasa for an overnight stay. On the following day, the tour operators take the tourists

to a wildlife safari in one of the national parks. This safari lasts several days. The average length of stay for departing tourists in 1992 was 13.4 days ... At the end of the tour, the process is re-enacted in preparation for departure from the country (Sindiga 1996: 29).

The promotion and marketing of Kenya's tourism product in tourist generating countries is mainly under the control of overseas tour operators and travel companies who have over the years marketed Kenya as the home of the 'Big five' (elephants, rhinoceros, lion, cheetah and buffalo). Thus overseas tour operators have, over the years, presented partial information and undifferentiated images of Kenya's tourist attractions. Consequently, little effort is expended in giving a complete and accurate picture of Kenya's diverse cultural and environmental attractions (Sinclair, 1990; Kibara, 1994).

Thus, it can be argued that the structure and characteristic of tourism development in Kenya in the 1960s and the 1970s fitted quite well with the global trends of mass consumption of undifferentiated and mass packaged tourism products. However, the current trends of international tourism have shown marked changes in visitor demands and expectations. For instance in recent years there is increased awareness of the threats that tourism poses to the physical and cultural environment. This has led tourists to examine the tourism products they purchase; thus the tourists want to know whether the tourism products that they are going to purchase meet their environmental and cultural expectations (Vella and Be'cherel 1999).

Consequently, the new awareness of the effects of mass tourism and the changing consumer needs has resulted to the increasing search for product authenticity and differentiated tourism products (McCannel 1976; Urry 1990; Ritzer and Liska 1997). Furthermore in the post-modern period, different social groups usually seek to distinguish their social status in education and occupation in the kind of goods and services they purchase and consume including tourism (Mowforth and Munt, 1998). The different ways of tourism product consumption implies that there exist different market niches and product demands.

Within the changing tourist market, a Third World destination such as Kenya which continues to provide undifferentiated tourism product based on beach and wildlife tourism may find itself left out in the highly competitive global tourism market. Consequently, in the changing global tourism market, Kenya may be perceived as offering a sterile tourism product.

#### **Reduction of the Quality of Kenya's Tourism Product**

The rapid development of tourism in Kenya in the 1970s and the 1980s was characterized by an unplanned

and haphazard development of tourism and hospitality facilities. Driven mainly by the profit margin, most private and multinational tourism investors usually tended to put their capital investments in locations perceived to have high potential for quick profit returns. These areas are mainly on the Coast, in Nairobi and in the few popular wildlife parks and reserves, such as Maasai Mara, Amboseli and Tsavo. This is probably due to the fact that these locations are perceived by tourism investors as having the highest potential for immediate profit returns since they attract most of the international tourists who visit Kenya (Sinclair, 1990; Kibara, 1994; Sindiga, 1999).

Unplanned and haphazard development of tourism facilities in fragile coastal and marine environment has, for instance, resulted in severe problems of tourism resource degradation. Hotels have been constructed that interfere with fragile marine ecosystems (lagoons, sandy beaches and coral reefs) without taking into consideration the environmental impacts of those facilities (Visser and Njuguna, 1992). High concentration of tourists in fragile marine environments has led to problems of overcrowding, trampling and over exploitation of marine tourism resources. As a consequence, the quality of the coastal and marine tourist product is increasingly being reduced.

Whereas in the national parks and reserves, the government and private investors have constructed hotels and lodge facilities inside the protected areas. Most of the tourism and hospitality facilities have been developed in important and fragile wildlife habitats near breeding grounds or important feeding areas; this is due to the high chance of viewing wildlife in these critical areas. Consequently, a number of tourism and hospitality facilities have been constructed in critical wildlife habitats without taking into consideration of the aesthetic value and ecological needs of the park's game. Such facilities include Voi Safari Lodge, Ngulia Lodge, and Kilaguni Lodge in Tsavo National Park and Kilimanjaro Lodge, Ol tukai Safari Lodge, and Serena Lodge in Amboseli. These lodge facilities have degraded important wildlife habitats and reduced their natural attractiveness. The dense concentration of people and traffic within the surrounding vicinity of these lodges affects the feeding, breeding and distribution of wildlife (Lusigi, 1978; Kibara, 1994).

In this regard, the promotion of mass tourism and increasing numbers of tourists visiting the game reserves presents a management dilemma for park planners. The tourism management strategies that aim at attracting maximum numbers of tourists, often compromise wildlife conservation and the natural beauty of the parks (Kibara, 1994). Furthermore, national parks' visitor carrying capacity may be exceeded resulting in overuse of park resources, visitor or vehicle over-crowding, reduction of the park's natural beauty and visitor dissatisfaction. In part,

due to increasing degradation and reduction of the quality of Kenya's tourism product, the country is currently experiencing severe problems of competition as more tourists are switching to countries in the region which offer similar tourist attractions. These include countries such as Zimbabwe, Botswana, Swaziland, Tanzania and Uganda.

### **Recent Insecurity in Kenya as it Relates to Tourism Development**

It can be argued that one of the sociopolitical factors which contributed substantially to the rapid development of tourism in Kenya, particularly in the 1970s and the 1980s, is that, unlike its neighbors in Eastern Africa which were experiencing political turmoil and civil disorder, the country remained relatively stable. In consequence, to the international tourists and multinational tourism investors, Kenya was generally perceived as an 'island' of economic and political stability in a 'sea' of political turmoil in the African continent. It was this tranquil image, among other factors, which influenced an increased number of international tourists to visit Kenya. Furthermore, the perceived sociopolitical and economic tranquility in Kenya encouraged an increasing number of multinational companies to invest in the country's tourism industry. Consequently the initial post-independence image of political stability and social order helped boost the international tourist market for Kenya as one of the leading tourist destinations in Africa.

However, ironically, in recent years and particularly in the 1990s, Kenya is increasingly being perceived as insecure destination, whereas the opposite is the case with many countries in the region, such as Botswana, Uganda and Tanzania. This is due to the fact that unlike Kenya, the sociopolitical situation in these countries has improved considerably in recent years. Since the opening-up of Kenya's political space (i.e. the advent of multi-party democracy) in 1991, there have been increasing sociopolitical feuds and civic strife as different political groups (which are mainly based on ethnic affiliations instead of ideological or philosophical orientation) attempt to seize the reins of power. In many instances, the political feuds have led to physical confrontations and bloodshed. Thus in recent years, the so-called politically instigated violence' has been experienced with increasing frequency in different parts of the country, including the major tourism centers such as Mombasa, Malindi, Diani and Nairobi. Furthermore, accompanying the recent waves of violence is increasing levels of crime and a general breakdown of law and order in many parts of Kenya.

With recent advances in electronic media, whenever these ugly incidents of political disorder and civic unrest occur, they are often widely and almost instantaneously covered in Western media. In consequence tourists and overseas investors are increasingly receiving disparaging

news reports concerning Kenya. Thus, it is no coincidence that whenever there are reports in Western mass media concerning political unrest in Kenya. There are always immediate and massive cancellations of advanced booking of visits to the country due to the perceived insecurity. Worse yet, most governments in the main tourist source countries in Europe and North America are increasingly issuing travel advisory warnings to their citizens who are planning to visit Kenya. The travel advisory warnings are usually taken very seriously, and tend to discourage prospective tourists from travelling to Kenya. Consequently, Kenya is currently being perceived, especially in the West, as insecure destination, and the country is losing hundreds of international tourists who now prefer travelling to countries in the region that offer a similar tourism product and are generally perceived as being secure. These countries include Uganda, Tanzania, Botswana and South Africa.

## CONCLUSION

In order for Kenya to compete effectively in the global tourism market, there is need to move away from a limited tourism product, based on beach and wildlife tourism, to offer a diversified and differentiated tourism product which has wider appeal to the existing tourism market. In other words, the country needs to broaden its tourism image of beach and wildlife tourism to include diverse activities that can be appealing to the post-modern society which is gradually moving away from mass production and consumption of standardized goods and services. In this regard, Kenya has great potential in developing diverse alternative tourism activities including ecotourism, mountaineering, sport-fishing, cruiseship, horse and camel riding, visits to rural villages, cultural shows and archaeological sites. Kenya, for instance, has over 40 ethnic communities with a myriad of cultural artifacts and practices (Sindiga, 1996: 26). The diverse ethnic cultures can be the base to develop "ethnic/village tourism" in different parts of the country. These form of tourism is quite appealing to tourists in the post-modern society, particularly in the North, who are increasingly becoming aware of their state of alienation brought about by technological and material advancements and; thus have a desire to experience the culture and environment of Third World societies.

Along the Kenya coast, the design of alternative tourism products can be done in order to move away from undifferentiated form of beach resort tourism. Here a differentiated and integrated tourism product can be developed whose center of focus will be moving away from the concentrated beach resorts to other under-utilized tourist attractions such as culture. Thus alternative coastal tourism product can be build around the hospitable Swahili culture, pre-colonial and colonial architecture, and historical monuments, and contemporary African handicraft

and art. In addition, aspects of ecotourism and visits to the mangrove forests, bird-watching and sport-fishing in the coastal creeks and lagoons can be incorporated in the development of alternative tourism product.

In order to meet the environmental high standards of ecotourism, tourism related activities in the wildlife preserves should be appropriately planned, monitored and managed to ensure they do not conflict with conservation and sustainable use of resources. Of particular importance, the visitor carrying capacity of national parks should be determined and the number of tourists regulated to avoid overcrowding and the degradation of the natural beauty of the resources. The park's visitor carrying capacity can be tabulated using empirical ecological data and social indicators, such as temporal and spatial distribution and density of flora and fauna in the park, territorial size of the park and physical terrain, visitor attitudes and behavior.

It is also important to note that the variables that influence consumption are centered on what is called 'life-motivators' that define the current post-modern existence including the urge by individuals to take part in leisure related activities (Dietvorst, 1993). In this regard, before even developing tourism products, Third World destinations such as Kenya need to have a clear understanding of the underlying 'motivator factors' which make international tourists decide to chose such far off destinations. Modern tourists usually seek distinct experiences which they cannot experience at home (Cohen, 1979). Thus, tourists are driven to visit various tourist destinations due to and on the basis of their underlying motivators. Moreover increased awareness about the effects of mass tourism has made tourists to be critical on the forms of tourism products and services being provided. An increasing number of tourists want to partake in recreational activities that are environmental friendly and have least cultural impacts on host communities. Also, in order to attract diverse tourist groups, there is need to develop, promote and market the country's diverse tourist attractions both locally and a broad. In this regard, there is also need to conduct market research in order to identify the kind of tourist market segments which are attracted by various tourism attractions that are offered by Kenya. The state should therefore establish more effective liaison with overseas tour operators and travel agencies including establishing contract agreement on how to provide adequate marketing and promotion of Kenya's diverse tourist attractions.

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