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THE ROLE OF TOURISM IN THE GROWTH
OF MALINDI AND ITS ENVIRONS

BY

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(ii)

DECLARATION

This thesis is my original work and has not been presented for a degree in any other University.

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ABSTRACT

The relationship between tourism and economic development is a subject of considerable controversy especially in the developing countries where tourism has come to be regarded as a panacea to the problem of balance of payments. This controversy is no doubt brought about by the complexity of the subject and diversity of perspectives. What is generally recognized is that, wherever tourism plays a major role in the economy, it brings with it many pecuniary and non-pecuniary benefits and costs. The exact nature and extent of the role of tourism in development is normally not very clear.

This study is an attempt at understanding the implications of development of tourism on the economic and social lives of the residents of a tourist destination area.

The study set out to assess the impact of tourism on the following socio-economic aspects in Malindi (one of the oldest tourist resorts in Kenya):

- (i) impact on employment
- (ii) linkage effects with other economic sectors, namely agriculture, fishing and commerce.
- (iii) impact on infrastructure

- (iv) impact on land-use and physical development of the town.
- (v) socio-cultural impacts.

In the introductory chapters the study looks at the historical development of tourism in Kenya, and the way it has contributed to the economic development of the country. The thrust of the study, however, is on the impact of tourism on the town of Malindi, and from the assessment of the impacts see how the industry could be more beneficial to the local community.

The study reveals that tourism has become the biggest source of wage employment in Malindi compared to the other sectors. It was however felt that a re-organization of the industry could offer even greater opportunities for employment.

The study also reveals that tourism has not stimulated the other economic sectors such as agriculture and fishing as much as would have been expected. The greater impact has been on the commercial sector, probably because its relationship with tourism is more direct. It was also considered that greater spread effect of the benefits of tourism could be achieved if the industry was organized in such a way as to facilitate greater participation in ownership of tourist establishments. The study therefore

recommends the encouragement of the development of small locally owned establishments in place of the standard tourist hotels which are invariably owned and operated by foreigners.

On infrastructure the study has shown that infrastructural development has been concentrated on the coastal zone, with the hinterland virtually left out.

The land-use pattern and the resultant physical development of the town is largely due to tourism development. The extensive ribbon development in Malindi is a pointer to this. The situation is further complicated by the fact that almost all the land in Malindi is held under freehold title, thus offering very little opportunity to public sector control of development.

The majority of the people in the area favour tourism development due to its economic benefits. They are, however, well aware of the social ills that accompany tourism development e.g. prostitution, beach boys, currency fiddles and other crimes. It was thus considered that the rate and scale of tourism development should be controlled so as to strike a balance between the economic benefits and the social costs.

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CHAPTER 1

INTRODUCTION

Statement of the Problem

The emergence of tourism as an important economic activity can be traced back to the 1950s, principally due to the development of efficient, mass, air transport, and a large increase in leisure time. Over the past 30 years, international tourism has become an increasingly important economic activity. Frank Mitchell (1973) places tourism as the second largest commercial sector in the world after oil¹. It reportedly generated more than US \$75 billion in 1979, representing 5.5% of international trade². Among the beneficiaries of this trade have been a number of developing countries, although only a small number of them are heavily dependent upon tourism. In Africa, tourism achieved a phenomenal growth during the 1960s and early 1970s. In 1971 the total number of tourists to Africa exceeded the 5 million mark³.

The relationship between tourism and economic development is a topic of interest to policymakers, planners, and researchers everywhere because tourism plays an important role within the social and economic fabric of society. It has become a subject of considerable controversy, particularly in Third World countries where tourism has come to be seen as an

efficient source of badly needed foreign exchange, generator of employment and source of revenue to the government. Benefits to the host country can be seen by the volume of air traffic to the nation's airports, hotel beds available and occupied, visitors' length of stay and their local expenditures. However, the unqualified enthusiasm of some for the development of tourism as a strategy for economic development can only be matched by the equally unqualified scepticism of others. Supporters of tourist development point out at its potential to create employment. Tourism, being a service industry is regarded as intrinsically more labour intensive, and therefore provides more employment and is as a result more efficient in spreading the benefits of development than most manufacturing industries. Apart from employment in the hotels, the tourists' spending creates further income earning opportunities outside the hotels:- they will want taxis, entertainment, handicrafts, restaurants, travel agencies, etc. The building of the hotels would also create much employment since the construction industry is also labour intensive. This is apart from the obvious foreign exchange earnings that accrue to the host destination. Tourism is also said to generate additional demand for food, thus further spreading the benefits of tourism⁴.

The case against tourist development also appears to be quite strong. This is probably due to the nature of the industry itself. Depending on the country concerned, the industry can be said to comprise of a wide range of individual enterprises supporting the mass movement of people across regions or international borders, including:

"a multifunctional and geographically dispersed system of wholesale and retail travel agents, airline companies, hotels, tour operators, advertising agencies, and other related enterprises"⁵.

In this way, it is unlike many other conventional industries : it does not lend itself to easy analysis in economic terms. An important point against tourism, for example, is its high "import component". Foreign exchange "leakages" in the form of imports of hotel fixtures, kitchen equipment, some items of food and beverages can become quite substantial. The magnitudes of such "leakages" depend to a large extent on the size and nature of the host economy.

Additional foreign exchange losses take the form of profits repatriation to multinational corporations that have invested in the tourist industry in the host countries. These losses also vary from country to country. These leakages and transfers of foreign exchange may even be considered justifiable costs if on balance it can be shown that the host country makes significant gains from tourism in the form of

tax revenues, earnings by local operators, employment generation and other indirect effects such as the stimulation of other sectors of the economy. And even if the economic benefits outweigh the costs, there is still the question of the adverse social and cultural effects associated with the industry. Many researchers have suggested that tourism has devastating effects on culture and social equilibrium leading to change changes in the value and attitudes of the host populations: it is said to be distasteful to bring the very rich into countries that are very poor. The former's affluence generates material ambitions for the latter that are totally out of their reach leading to a break with traditional means of production, petty crimes and prostitution.⁶

Thus, although Kenya has had remarkable successes with tourism development, many policymakers and researchers continue to ask many searching questions about the real benefits of tourism to the country. Kenya's tourist industry has grown over the last 15 years to become the most important foreign exchange earner after coffee and tea; with foreign exchange earnings rising from K£7.9 million at Independence to K£122 million in 1983.⁷ The industry employs directly at least 45,600 people and it reportedly generates at least K£30 million in government revenues, including direct taxation.⁸ In 1968 it was estimated that the net foreign exchange

earnings (after allowing for the cost of imports by the industry, and some repatriation of profits) was about 75% of the gross earnings⁹. The Economist Intelligence Unit in 1979 estimated that 80% of the gross earnings from Kenya's tourist industry were retained in the country. This estimate is seen as wildly exaggerated especially when compared to the World Bank's estimate of 55% for most developing countries¹⁰.

The fact that there are doubts as to the real benefits of tourism suggests that although many people generally recognize that tourism plays a key role in the economy of Kenya, the understanding of the exact nature and the magnitude of that role is limited. This study is a contribution to the on-going debate on the role and significance of tourism to the local economy, particularly at the local level. The study focusses on Malindi and attempts to evaluate the impact of tourism on this important tourist resort; bearing in mind that tourism has been and is Malindi's main growth industry.

Definitions of Terms and Concepts

Definitions of terms and concepts related to tourism and the tourist industry often vary from country to country. However there are some definitions which for statistical purposes have come to be adapted universally and are approved by the World Tourism Organization and the United Nations Statistical Commission.

Visitor: a person visiting a country other than that in which he has his usual place of residence for a reason other than following an occupation remunerated from within the country visited.

Tourist: a temporary visitor staying at least 24 hours or overnight in the country visited, whose journey is for the purpose of leisure (holiday, sport, recreation). A temporary visitor staying less than 24 hours is termed an Excursionist.

Tourism Industry Sector: consists of a number of subsectors that provide goods and services to tourists. Although there is some definitional variation from destination to destination, the subsectors generally include hotels, restaurants, shops, bars and night clubs, other entertainment (casinos, theatres) taxis, car rentals, tour operators etc.

Tourist Expenditures - Receipts: money spent by tourists on goods and services provided by the destination. Expenditures that do not enter the destination (e.g. air fares paid to international airlines) are excluded. Also included are receipts from stayover tourists and cruiseship passengers, disaggregated into such categories as hotel room, entertainment, gift shops etc.

Gross tourism foreign exchange: Foreign exchange that flows into the destination due to expenditures by tourists. Since tourists must change foreign currency into local currency when entering most destinations, gross tourism foreign exchange is equivalent to tourist-expenditures.

Leakages: The loss of tourism foreign exchange caused in large part, by the need to import goods and services required by the tourism industry.

First-round leakages: Those earnings that flow out almost immediately upon receipt. These leakages are usually due to the import of goods such as foods and liquor required by hotels, and other subsectors of the tourism industry. Generally, purchases of imported goods from local intermediaries are included.

Second-round leakages: Foreign exchange earnings that circulate at least once through the economy of tourist destination before flowing out.

Net foreign exchange: Gross (minus) first round leakages.

Direct employment: employment created by the first round of tourism expenditure within the subsectors of the tourism industry (especially hotels, restaurants, local transport, shops, and entertainment.

Indirect employment: employment created by the second round of tourism expenditure, particularly in nontourist sectors of the economy, such as government construction, that although not directly involved with tourism partially benefits from it.

Literature Review

As stated earlier, the relationship between tourism and development is a subject of considerable controversy particularly in the developing countries where tourism has come to be seen as a panacea to the problems of balance of payments, unemployment etc. The impacts of tourism on the host societies has of late received a lot of attention from policymakers, planners and academics. This can be attributed to the fact that there has been a growing recognition within governments of the possible costs and benefits associated with tourism within local economies, and of the need to apply long-range planning strategies based on accurate market and product information.

The Diani Resort Complex Study is a fine example of an attempt at understanding the nature and magnitude of the role of tourism in local economies¹¹. The study was commissioned in 1974 to design a Beach Resort Complex that would integrate economic, social, cultural and environmental aspects of tourism development. The study team included specialists in the fields of economic and financial planning, urban and rural planning, engineering, sociology, ecology, tourism marketing, architecture etc. The Government's objectives reflect the issues that researchers, planners and policymakers grapple with in this subject:

.....Kenya's fundamental policy is to maximise nett economic benefits from this activity, subject to social, cultural, environmental and political constraints. In practice, this means maximising wealth generated by tourism (of which raising nett foreign exchange receipts is one component), raising employment opportunities, promoting increasing Kenyan ownership and management in a growing industry, and reducing to the extent possible any undesirable social and environmental consequences of tourist expansion¹².

Most tourism research has been borne from the continuing debate over the pros and cons of tourism development. As a result most of the studies have been criticized of lacking a coherent theoretical framework. Points made on each side are convincing in isolation but fail to disprove the arguments of the other in wider contexts.

Many arguments in favour of tourism have been economic in nature, and expounded more often than not by economists ¹³ (Bryden in West Indies and Frank Mitchell in East Africa, Peter Diamond in East Africa). Arguments against have drawn heavily upon sociology and anthropology ¹⁴ (Migot-Adholla in Kenya, Cohen). Economists and sociologists, however, do rarely speak the same language. While economists think in terms of money, sociologists and anthropologists concentrate more on quality. As Migot-Adholla concedes, economic benefits from tourism can be fairly adequately demonstrated by statistics while costs of tourism development in terms of political, social and cultural implications are more abstract and therefore difficult to quantify.

The aspects of tourism which have received considerable attention in recent years from researchers such as Bryden and Mitchell include:

- (a) the effect on foreign exchange earnings
- (b) income effects
- (c) employment effects
- (d) effect on domestic price levels etc.

Advocates of tourism have stressed the influx of foreign exchange from tourist receipts. It is indeed true that tourism is an extremely efficient earner of foreign exchange compared to manufacturing industries. According to Mitchell, ONE pound's

worth of resources devoted to tourism earns more foreign exchange than would be saved by TWO pounds' worth of resources devoted to a wide range of import substitute industries¹⁵. However, much of this tourist-derived foreign currency 'leaks out' of the economy at the initial and subsequent stages of transaction. This is what Seward and Spinrad refer to as first-round and second-round leakages. Tourism creates an increased demand for imports to satisfy the higher living standards demanded by visitors. At the same time further foreign currency is lost to the economy as expatriate labour remits some of its earnings overseas. In Mauritius, for example, it has been calculated that only 10% of the total tourist receipts from inclusive tours represent nett foreign exchange earnings¹⁶. Similar calculations for Kenya done by Mitchell in 1968, and by the Economist Intelligence Unit in 1979, give nett foreign exchange earnings as 78% and 80% of gross receipts respectively. Such high figures are probably due to inexhaustive definitions of both first-round and second-round leakages.

Many researchers attribute the problem of leakages to insufficient backward linkages to the traditional sectors of the developing country's economy, i.e. the economics of such countries are not big and diversified enough to supply the quality

of goods and services to the tourist industry. Economically diversified Spain enjoys higher net benefits than, say, Kenya or one of the small Caribbean islands.

Perhaps the most controversial aspect of tourism research is the income effects of tourism. The few studies done to assess the level of personal incomes accruing to the indigenous populations vary in methodology. In Antigua, Bryden used income multiplier analysis to show the effect of tourist expenditure on the level of incomes. However, what is more important is not its income generation effect but the income redistribution which it brings about. Tourism affects income distribution through the combination of inputs which it requires : some goods and factors of production are required in greater quantity than before, whilst the demand for other inputs may even decline.¹⁷

Another aspect of tourism that has received a great deal of attention from scholars and planners is its effect on employment. Tourism is labour intensive and can absorb a large number of semi-skilled and unskilled workers which, in a developing country, is largely drawn from traditional sector. Apart from merely showing total enumerated employment in the sector, researchers like Mitchell and Elkan have drawn comparisons with employment in other sectors, e.g.

manufacturing industry, and the cost of creating such employment. For example, Elkan (1974) shows that the cost of providing a work place in a hotel is K£3,304 compared to an average of K£1,233 in Manufacturing and Repair¹⁸. Hotel employment, however, does not represent employment in the whole industry. It does not take into account employment created in the manifold ancillary activities which tourism creates. Ruiz, in a study on the effects of tourism in Mexico showed that in 1969 an investment of \$80,000 in tourism created 41 jobs, compared with only 16 in the petroleum industry and 15 in the metal trades. It has been argued that a large number of employees in the tourist industry are engaged in low status occupations but that can hardly be compared to outright unemployment or marginal existence on the land.

Other writers, e.g. Young (1973) have drawn attention to the dangers inherent in overdependence upon tourism as a source of revenue. This is due to seasonal fluctuations, its sensitivity to international political events, and the fact that tourism is income and price elastic and so responds more than proportionally to changes in these variables¹⁹.

The impact of international tourism on the social and cultural values of the indigenous populations has

assumed greater importance in recent years. Issues that had been overlooked by advocates of tourism development have now emerged, and the negative aspects brought out threaten to become a deterrent to tourism. It has been suggested by many sociologists and anthropologists that tourism can have potential devastating effects on culture and social equilibrium. Other issues that have come up include that of income distribution and the growth of a 'parasite' image of tourism employment. Miqot-Adholla (1982) tries to explain why social and cultural costs have heretofore been disregarded in evaluation of tourism development. He is of the opinion that the tools of economic analysis are ill-adapted, if not incapable, of handling social variables:

Social changes are often not easy to forecast and their dimensions clearly defy quantification except in rather crude and very tentative terms. Furthermore, the assessment of the effects of tourism on the social fabric often involves subjective judgements of the attitudes and values predominant in any particular society. The exercise is particularly hazardous where there are few stable value guidelines for the purpose ²⁰.

Apart from the difficulties in analysing social and cultural costs, there is the feeling that most of the claimed social costs of tourism have remained largely unsubstantiated. From the many studies that have been done on this subject in various countries, one gets the impression that social and cultural effects of tourism are dependent on the relative

vulnerability of an indigenous culture to outside influences. Vulnerability can be seen to be a product of such things as strength of national identity, depth of national history, size of the cultural unit in question and type of colonial experience. This could explain why most of indigenous coastal peoples do not seem to have been greatly influenced by tourism.

What emerges from this review is that there is a general recognition that tourism plays a key role in the economies of many developing countries, Kenya being a fine example. Various studies have shown how tourism has the potential of providing much-needed foreign exchange and employment opportunities, generating government revenues, and stimulation of other sectors of the economy. The studies have also shown that the benefits from tourism vary significantly from country to country and it would be fallacious to make generalizations. This study attempts to understand the exact nature and magnitude of the role that tourism plays in the development of an important tourist destination area - Malindi. This is done by analyzing the impact the industry has had on the development of Malindi and its immediate environs. Most of the issues that have featured in most tourism debates - employment, linkages, effects on infrastructure, are dealt with; and thus the study is a contribution to the on-going debate.

Study Objectives

It has been argued that tourism makes a significant contribution to economic development in many countries in terms of:

- (i) the potential tourism provides for much needed foreign exchange and employment opportunities;
- (ii) broadening the economic base of these countries through its linkages with the agricultural, industrial, and service sectors of the economy; and
- (iii) generating taxes and other direct and indirect government revenues.

The benefits from tourism differ significantly from destination to destination; with economic benefits depending to a large extent on the size of the host economy etc.

The objective of the study is to measure selected aspects of the impact of tourism in Malindi, and hence assess the contribution of tourism in the development of Malindi. The following aspects shall be studied:

1. Direct and indirect employment generated by tourism²¹. Direct employment was considered to be that employment created by tourism expenditure within the subsectors of the tourism industry (especially hotels, restaurants, local transport,

gift shops, tour operators, and entertainment). Indirect employment was considered to be that employment created by tourism expenditure in essentially nontourist sectors of the economy, such as construction, furniture workshops, local transport, etc, that although not directly involved with tourism partially benefit from it.

2. The extent to which tourism has stimulated or stifled the growth of other economic sectors through backward linkages.
3. The growth of tourism normally creates a need for an improved infrastructure in developing economies. It is therefore an objective of the study to assess the impact of tourism on trunk infrastructure like roads, telecommunications, water supply, air transport etc.
4. Impact of tourism on land-use patterns, and how these have affected the physical development of Malindi.
5. Social-cultural impacts of tourism. The impacts of tourism on the social and cultural values of the indigenous populations of developing countries have been analyzed by specialists in more relevant fields than the author's. However no account of tourism can be complete without at least a list of

the possible social effects of tourism.

6. After analysing the above aspects, the study comes up with policy proposals at both the national and local levels with a view to making tourism development more beneficial to the local community.

Assumptions

The following assumptions were made with respect to the objectives of the study:

1. Tourism, over the years has become the dominant economic activity and has contributed both directly and indirectly to most of the employed in Malindi.
2. The growth of tourism has stimulated the growth of other economic activities in Malindi and its environs.
3. Tourism development has adversely affected land-ownership and land-use patterns in the area. The physical development of town (magnitude and direction) is a direct result of tourism.
4. Growth of tourism has resulted in:
 - (a) benefits to the local residents in terms of improved infrastructure;

- (b) inadequacy in provision of infrastructural services to the local residents due to unplanned growth.
5. Expansion of tourism has had bad effects on the social values of the indigenous people.

Research Methodology

Various methods of collecting data were used: questionnaires, formal and informal interviews, from publications (books, reports, newspapers), inventory, and participant observation.

Most of the data on employment was collected through questionnaires and interviews. Questionnaires were administered to all known hotels and to some restaurants, bars and night clubs known to specifically cater for tourists. Different questionnaires were administered to tour operators, travel agents in Malindi. A number of interviews were conducted with proprietors of safari outfitters, boutiques, gift shops, housing and estate agents, and other tourist related businesses. The principal aim was to elicit information about numbers employed in the different occupations and in what capacity. The hotel questionnaire also sought information on hotels' expenditure on local produce, and their views on the state of infrastructural services. Additional data on employment was obtained from the District Labour

office in Malindi, and the Central Bureau of Statistics.

Government officers at the Divisional Headquarters and Kilifi District Headquarters were also interviewed to elicit information on the other economic sectors. This was supplemented by Annual Reports covering past years. Other sources of information included the Kenya National Archives, and other libraries.

One of the objectives of the study was to assess social impacts of tourism. Towards this, a questionnaire was administered to a section of the population, supplemented by interviews with some prominent residents to get their opinions on tourism development.

Since the object of the study was to assess the impacts of tourism, a 'before and after' analysis was used. Although tourism in Malindi dates back to the early 1930s the benchmark for the study was set at mid - 1960s. The reason is that this period coincides with the time Malindi began to receive package tours. The result was a major and rapid expansion of tourism development in Malindi. This period has also come to be seen as the stage when Kenya's tourism industry entered the "institutionalization" phase²². The rationale behind this approach is that with the coming of the package tours there was a major expansion in tourism and therefore the impact would be more discernible from this period onwards.

There is also the additional reason of the unavailability of "hard data" (especially on employment) for the earlier stages of tourism development. It was also found useful to compare the growth of employment in other major sectors of the economy in Malindi over the same time-frame as a way of showing impact.

For land-use pattern and physical development of the town use was made of aerial photograph and cartographic techniques for analysis purposes.

Scope of the Study

Initially it was the intention of the researcher to cover the whole of the Malindi Municipal Council area which includes Watamu village to the south of Malindi along the coast. However, Watamu was left out in the study because of two main limitations. First, the greatest limitation was on time and financial resources. Secondly, Watamu is a tourist resort on its own right, having developed into a tourist resort in different stages, and therefore deserving separate attention²³. As indicated earlier, the impacts of tourism to a large extent vary from destination to destination.

Again due to limitations on time only selected aspects of the impact of tourism were considered.

The researcher however recognizes the complex nature of tourism, in that it embraces a diversity of human activity involving social, cultural, economic, political, and environmental issues (such as impact of tourism on health of the host community, cost of living of host community etc.

Apart from highlighting those aspects of tourism that appear to affect the socio-cultural values of the people, no attempt was made at an in-depth analysis of tourism's effects on the social and cultural systems due to the complicated nature of such an analysis.

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17. Op.Cit., p. 17.
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21. The definitions of direct and indirect employment vary r from country to country depending, to a large extent, on the size of the economy, and the employment statistics available. Direct employment is, in most cases, much easier to determine. See Shirley B. Seward and Bernard K. Spinrad, (ed.), Tourism in the Caribbean : The Economic Impact Walter Elkan, "Tourism and Employment in Kenya and Tanzania", and M. Baud-Bovy, Tourism and Recreation Development (London : Architectural Press, 1977), p.1.
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CHAPTER TWO

DEVELOPMENT OF TOURISM IN KENYA

Introduction

This Chapter will review the development of tourism in Kenya starting from what Noronha terms "organic" or "discovery" stage through "local response and initiative" stage to "institutionalization" stage¹. There will be a section covering the historical growth of tourism in terms of the number of visitors, resources and attractions and their diversification; the evolution of Government policies on tourism development; growth of tourist facilities and infrastructure. The Chapter will also look at the significance of tourism in national development as a whole.

Historical Growth of Tourism

The "discovery" stage of tourism in Kenya can be traced back to the late 1920s and early 1930s when a few wealthy European and American hunters started visiting Kenya for the express purpose of hunting wild game². * This early type of tourism was characterized by leisurely exploration without any organized accommodation or catering facilities, hence could only be afforded by the wealthy and privileged. This exploratory type of tourism differs a great deal with the present day mass tourism. The destination

areas grew in popularity and the number of tourists grew year after year.

However coastal tourism did not gain any prominence till after the firm establishment of colonial rule. The white settlers from the highlands were among the first "tourists"³ at the coast. During this stage, as is characteristic of the "discovery" stage, there was hardly any tourist infrastructure. According to available records Malindi was the first town to develop into a tourist resort, with the establishment of the first hotel, Brady's Palm Beach Hotel (later renamed Blue Marlin Hotel) in 1932⁴. Mombasa was the next town to develop into a tourist resort around 1947⁵. ✓

The second World War depressed Kenyan tourism almost to nought, except for foreign arrivals at the ports and inland depots of the British armed forces⁶. After the war, the number of visitors grew (especially at the Coast) and this resulted in the establishment of some local organizations to provide for facilities. The East African Tourist Travel Association (EATTA) was formed in 1948 to take over from the East African Publicity Association. This ushered in the second stage of tourism development, i.e. "the local response and initiative" stage. This stage is characterized by a greater degree of organization of the tourist trade. The EATTA was a semi-official organization

aimed at promoting, fostering and maintaining the tourist traffic within the East African territories. This stage also coincided with the beginning of regular commercial air link between Europe and East Africa.

From 1954 Kenya realized some modest increases in its annual tourist arrivals. By 1958/59 the upsurge in tourist arrivals was so great that tourism was second only to coffee as an "export" item. The number of American arrivals alone had increased from 133 in 1949 to 5,000 in 1959⁷.

Table 2.1: Tourist arrivals in East Africa ('000s)

1938 - 1964

Year	Uganda	Growth rate %	Kenya	Growth rate %	Tanzania	Growth rate %
1938	-		-		3.1	-
1939	-		-		3.4	10
1946	-		16.09	-	-	-
1947	-		19.74	23	5.30	56
1948	-		20.64	4	8.50	60
1949	-		17.56	-15	8.16	-4
1950	-		24.06	37	3.72	-54
1951	-		33.44	39	5.12	38
1952	-		36.01	8	5.83	14
1953	-		32.15	-11	6.70	15
1954	-		33.23	3	6.21	-7
1955	7.38	-	39.54	19	7.93	28
1956	8.62	17	40.46	2	9.50	20
1957	11.40	32	43.12	6	10.60	12
1958	10.40	-9	41.20	-4	7.63	-28
1959	10.45	0.5	44.93	9	7.88	3
1960	7.12	-32	35.80	-22	7.53	-4
1961	7.71	8	42.04	17	7.35	-2
1962	8.97	16	49.92	19	9.26	26
1963	12.25	36	61.35	23	9.88	7
1964	12.69	4	65.45	7	7.14	-28

Source: J.P.B.M. Ouma (1970), Evolution of Tourism in East Africa, Nairobi : E.A.L.B.

The years immediately before independence could be viewed as the take-off stage into mass tourism in Kenya. This expansion resulted in an immediate scarcity of hotel accommodation. The big boom in Kenya's tourism began in the mid-sixties, coinciding with the introduction of cheaper package tours.

During this period the tourist traffic to Kenya was more than trippled (Table 2.2).

Table 2.2: Kenya Tourist Traffic and Expenditure

Year	Total Visits ('000s)		Total Expenditure (K£m)	
		Growth rate %		Growth rate %
1963	110.2	-	9.0	-
1964	120.8	10	9.4	4
1965	147.4	22	10.8	15
1966	188.7	28	14.3	32
1967	225.5	20	14.7	3
1968	257.1	14	17.3	18
1969	276.0	7	16.7	-3
1970	338.8	23	18.5	11
1971	399.7	18	23.9	29
1972	428.4	7	27.3	14
1973	388.1	-9	24.3	-11
1974	379.6	-2	26.5	9
1975	386.1	2	33.4	26
1976	424.2	10	41.1	23
1977	344.4	-19	48.3	18
1978	333.3	-3	60.0	24
1979	347.2	4	62.0	3
1980	362.6	4	82.5	33

Source: Various Kenya Government Statistics.

The impressive growth of Kenyan tourism in the 1970s was seriously interrupted in 1974 as a result of a combination of factors, principally economic stagnation in the main tourist generating countries and general world-wide recession. In 1974, there was a decline of 3% in international arrivals, the

the first such in 20 years ⁸. Another contributory factor could have been the political situation in the region. Political developments in Uganda and Tanzania gave the East African region adverse publicity in the tourist generating countries. The East African region, at that time, used to be promoted as one tourist destination; therefore political instability in any one country could have far-reaching consequences on any one country in the region.

In general, however, Kenya's tourist industry has shown remarkable growth over the last 15 years or so, and it maintains a competitive position with other long-haul destinations.

Tourist Resources and Attractions

The tourist industry in any country consists of the varied activities which provide the goods and services on which tourists spend money. Tourists coming to Kenya have found a multitude of attractions whose quality and availability have varied from time to time. The concern of this section is to highlight the development and diversification of tourist resources and attractions in Kenya right from the "discovery" stage to the present-day.

Kenya's major tourist assets have always been its excellent wildlife resources, delightful beaches, magnificent scenery and admirable climate. Over the years diversification has integrated other attractions like historical monuments and antiquities with conference tourism, and the people themselves. In the early years the major attraction to tourists coming to Kenya was the wildlife. As stated earlier, these early tourists were mainly "adventurers" or "pioneers" whose sole purpose was hunting or photographing wild game. In the early days there was hardly any widespread restriction in Kenya against hunting. So as more and more tourists/hunters came, there was a gradual but systematic decimation of East African Wildlife. This was because, although East Africa's fauna and flora has always been the major attraction to holiday makers, there was no official promotion of East African tourism till the formation of EATTA in 1948. So no effective conservation measures and regulation of hunting were imposed until the late 1940s.⁹ However, over the years the Kenya Government has come to realize the economic importance of protecting its fauna and flora, so much so that Kenya today devotes nearly 10 per cent of its total land area to wildlife conservation - understandably one of the highest in the world. The table below shows Kenya's game parks and reserves as they are today:

Table 2.3: Kenya National Parks and Reserves

Name	Area (Ha.)	District Located
Nairobi	11,721	Nairobi
Tsavo (East and West)	2,082,114	Taita/taveta
Mount Kenya	71,559	Embu/Meru/Nyeri/ Laikipia
Lake Nakuru	5,763	Nakuru
Aberdares	76,519	Nyandarua/Murang'a/ Nyeri
Meru	87,004	Meru
Ol Donyo Sabuk	1,842	Machakos
Mpunguti Marine	2,301	Kwale
Mount Elgon	16,923	Trans Nzoia
Sibiloi	157,024	Turkana
Amboseli	39,026	Kajiado
Malindi and Watamu	23,587	Kilifi
Shimba Hills	19,251	Kwale
Lake Bogoria	10,705	Baringo
Marsabit	108,842	Marsabit
Arawale	53,324	Garissa
Kora	169,229	Tana River
Boni	133,960	Garissa
Shaba	23,910	Isiolo
Buffalo Springs	33,915	Isiolo
Dodori	87,739	Lamu
Tana River Primate	16,807	Tana River
Rahole	130,810	Garissa

Name	Area (Ha.)	District Located
Masai Mara	167,274	Narok
Losai	180,680	Marsabit
Ngai Ndethya	21,209	Kitui
Mwea	6,803	Embu
Samburu	16,000	Samburu
Lambwe Valley	30,800	Homa Bay
Ngong		Kajiado
Tsavo Road and Railway	11,205	Taita/Taveta
West Chyulu	37,500	Taita/Taveta

Source: UNDP/FAO Project KEN: 71/526 Wildlife Management in Kenya Document No.8.

Apart from the wildlife resources, the other major tourist asset that is increasingly attracting large-scale tourism is the Indian Ocean Coast. The major attraction of the Kenya Coast is the fine sand beaches fringed by palm groves, with warm sea waters sheltered by coral reefs. Safe swimming, goggle fishing, skiing, deep sea fishing, etc. are among the outstanding attractions of the Indian Ocean Coast. The first modern tourists to Kenya's coast were the white settlers from the Kenya Highlands and Rhodesia in the early 1930s. Most of the early coastal tourism was focussed on the northern coast. However, it was not until the years after Independence that the Kenya Coast started attracting large numbers of

foreign tourists. Since then the coast has become a perfect place for a seaside vacation for people of the highly industrialized cold regions of Europe. Its value is also greatly enhanced by the possibility of integrating beach holidays with wildlife viewing within the same package.

Tourist Facilities and Infrastructure

The development of tourist facilities and infrastructure is, without doubt, one of the most important determinants of successful tourism planning and development of tourist attractions. The growth of tourism, creates a need for an improved infrastructure in developing economies. Some of the facilities, such as roads and airports, only serve tourists incidentally. The roads serve toward agricultural and other economic and social developments as well. As Ouma (1970) puts it,

"the faster and more robust a country's general development is, the more likely will the tourist facilities spring up fast".¹⁰

For example, Kenya's faster economic development since World War II was accompanied by a fast development of hotel accommodation and other facilities.

Generally, the growth of tourist facilities and infrastructure in Kenya followed closely the growth of tourism. The early efforts to provide tourist accommodation, for example, included changing

of private houses into guest houses or small hotels. However by the early 1950s there were organized efforts, through EATTA, to expand tourist facilities like accommodation and improvement of infrastructural services such as railway, water, road and air links. With the tourist boom of early post-independence years were improvements in road-networks to tourist destination areas and expansion of airports. Along with increase in the number of tourists since Independence, there has been a remarkable expansion of the capacity of hotels and game lodges. Total bed capacity has increased from 5,840 beds at Independence to 24,100 beds in 1982¹¹. Most of the development of tourist accommodation, transport and entertainment facilities in Kenya has been undertaken by private companies.

Just as increase in the number of tourists necessitates growth in facilities and infrastructure, the development of tourist facilities and infrastructure enhances growth of tourist traffic. Investments in infrastructures like the new Jomo Kenyatta International Airport in Nairobi, Moi International Airport (Mombasa) and several improvements of airstrips and road networks have greatly improved both the comfort and speed of travel between tourist centres and the year round accessibility of tourist attractions.

Evolution of Tourism Development Policies

Before the birth of official and semi-official bodies (such as EATTA) concerned with the promotion of tourism, there was no recognized policy for tourism development in East Africa. It could be argued that in the early 1930s there was little tourism to plan for. The first local organization concerned with promotion of tourism was the East African Publicity Association (EAPA) formed in 1938. EAPA was later succeeded by EATTA in 1948. The most important feature of pre-independence tourism was that its organization was left to private and semi-official bodies. During EATTA's lifetime some of the issues brought up -included frontier formalities between the East African countries, improvement of railway, water and road services.

It was during the wake of EATTA that recording of tourist arrivals to East African began. As the number of tourists coming to Kenya grew the colonial government began to realize the economic benefits of tourism. This realization was no doubt enhanced by the reliability of statistics recorded by EATTA. In 1957 the colonial government created the Ministry of Tourism in Kenya under Mr. E.W. Crosskill¹². He made an appeal for complete co-operation among East African countries in tourism development.

The biggest expansion in Kenya's tourism came during the stage of mass-tourism, beginning roughly with political independence in 1963. As the volume of tourists keeps on rising the government has over the years evolved various policies on tourism development that have had varying effects on such tourist statistics like volume of tourists, type of tourists (e.g. luxury tourists, mass tourists, etc ¹³), hotel accommodation, and other infrastructures. The past National Development Plans and other official government documents illustrate vividly the evolution of tourism policy. The government started taking keen interest in tourism development when it realized the sectors role as an important foreign exchange earner and a stimulant to domestic income and employment in related industries.

The greater part of the tourist industry in Kenya has always been controlled by the private sector. The IBRD Economic Survey Mission of 1962, while recognizing this fact, saw the government's role as that of creating and maintaining an atmosphere conducive to drawing visitors to the country, and the provision of basic facilities to make local travel and sight-seeing reasonably easy ¹⁴. At this point in Kenya's tourism development, policy was directed towards increasing the volume of middle-income tourists as well as what has been referred to as "luxury tourism". The other major policy issue was on the

protection of the game and making wildlife sanctuaries accessible to tourists.

The sector objectives set in the following Development Plans show the direction tourism development policy was taking.

1966 - 1970 Development Plan

In order to realize sound development of the tourism sector the government took four important steps in 1965:

- (i) commissioned the Bertrand Study on tourism in Kenya;
- (ii) a feasibility study was initiated on the "construction and improvement of tourist lodges";
- (iii) a feasibility study done on "tourist roads",
- (iv) and KTDC was established.

The government's tourist development policy at this stage called for closer co-operation between the private and public sectors, and the need for a co ordinated planning of the tourist sector. The "Bertrand Report" which came out during this plan period made a number of recommendations that were adopted by the government including;

- (i) the continuation of the general policy pursued since 1945 for game protection and the exploitation of its tourist value.

- (ii) emphasis laid on the need for rapid development of accommodation in game lodges;
- (iii) a diversification of the touristic attractions in Kenya.

The government continued to play a vital role in the provision of infrastructure for tourist development.

1970 - 1974 Development Plan

There was no appreciable change in government policy towards tourist development. Despite substantial investments by KTDC ¹⁵, the tourist industry was still predominantly privately owned and run, and this trend was encouraged. Of importance was the recognition in 1972 that the development of the tourist industry was making demands on Kenya resources that were no longer marginal. It was resolved that in future the planning of new tourist circuits and facilities would have to take into account all the direct and indirect costs of development. This would enable comparisons to be made with the expected flow of benefits. This made it necessary for the government to try and identify which types of tourist bring most net benefits to the economy.

1974 - 1978 Development Plan

With increasing realization of the varied implications of tourist development, official policy

began to slowly change. Some of the sector's objectives for this plan period included:

- (i) striking a balance between maximizing net economic returns and maintaining an orderly rate of growth, with expanding employment for citizens.
- (ii) not permitting too sudden exposure to consumption and spending habits of foreigners that might damage the nation's cultural traditions.

These two objectives indicate a more cautious approach to tourist development.

1979 - 1983 Development Plan

The main objective was to maximize net returns subject to important social, cultural and environmental constraints. This objective expresses the concern about the consequences of the exceedingly rapid growth of tourism that had taken place in the past 15 years especially at the coast. This rapid growth had resulted in 'unplanned ribbon' development of hotels together with "flagrant lack of sensitivity to adverse social, cultural and environmental impacts" ¹⁶. In practice, this objective meant maximizing earnings generated by tourism, raising employment opportunities, promoting increasing Kenyan ownership and management in the industry, and reducing

to the extent possible any undesirable social and environmental consequences of tourist expansion.

In addition greater emphasis was placed on a more effective integration of wildlife development and management policies with objectives of tourism development. Other policy issues raised in the 1979 - 83 Plan include pricing of tourist-services to ensure maximum economic gains to Kenya and appropriate civil aviation policy to increase the share of Kenya Airways in tourist traffic without jeopardizing long-haul tourism to Kenya.

1984 - 88 Development Plan

The main objectives during this plan period is to increase the sector's contribution to the growth of GDP, raise the foreign exchange earning capacity, and create more employment opportunities. In other words there is no dramatic change in policy.

Achievements : Tourism and National Development

The relationship between tourism and economic development is a subject of considerable controversy especially in developing economies. As Elkan puts it:

"The unqualified enthusiasm of some for the development of tourism as a strategy for the development of low income countries is only matched by the equally unqualified scepticism of others" 17 .

Many arguments in favour of tourism are economic in nature. Benefits to the host country in terms of generation of foreign currency, employment opportunities, and government revenues are readily reckoned by the volume of air traffic to the nation's airports, hotel beds available and occupied, visitor's length of stay and their local expenditures. Arguments against tourism development have drawn heavily upon sociology and anthropology. They see negative aspects of tourism such as corruption of elites by Western lifestyles, destruction of historic, religious or scenic artefacts and sites, and the commercialization of handicrafts and other forms of cultural self-expression.

The above arguments for and against tourism apply to Kenya's tourism industry. Kenya's tourist industry has shown remarkable growth over the last 15 years or so. Among individual countries in Africa, Kenya today stands third after Morocco and Tunisia as an important tourist destination. Vital tourism statistics for Kenya seem to lend credence to the belief that the tourism sub-sector is one of the most important industries in Kenya today. Tourism today is the most important foreign exchange earner after coffee and tea. Foreign exchange earnings from the tourist sub-sector have increased steadily since independence, rising from K£7.9 million at Independence to K£122 million in 1983¹⁸.

The industry employs directly at least 45,600 people; and although maids and waiters may be low status occupations they are scarcely inferior to outright unemployment or a marginal existence in subsistence agriculture. The tourism sub-sector reportedly generates at least K£30 million in government revenues, including direct taxation ¹⁹.

Along with the increase in the number of tourists since Independence, there has been a remarkable expansion of the capacity of hotels, and game lodges. Total bed capacity has increased from 5,840 beds at Independence to 24,100 beds in 1982, while the corresponding bed occupancy rate has increased from 47% to 51.4%.

In spite of the apparent successes of tourism many Kenyans continue asking questions about the real benefits of tourism to Kenyans. This scepticism is largely due to the nature of the industry itself; in that it is characterized by a large 'import component'. This leads to foreign exchange 'leakages' in the form of imports of hotel fixtures, kitchen and air conditioning equipment, imported foods and liquors etc. In addition foreign exchange losses take the form of financial transfers in respect of profits to multinational corporations engaged in equity participation in hotels and tour operations.

The 'import component' varies from country to country. In 1968 it was estimated that the net foreign exchange earnings (after allowing for the cost of imports by the industry, and some repatriation of profits) were about 75% of gross earnings ²¹. A similar estimate for 1979 done by the Economist Intelligence Unit suggested that 80% of the gross earnings were retained in the country ²² (see table 2.4). The table analyses selected sub-sectors only.

Table 2.4 Foreign Exchange Earnings by Tourism Sector
K£m

Sub-Sector	Revenue	Gross Earnings	Outflow	Net	Net % of Gross
Hotels, lodges	42.1	31.2	5.1	26.1	83.7
Restaurants	7.4	2.5	0.2	2.3	92.0
Other Food & accommodation	7.5	3.8	-	-	-
Tour Operators (net)	8.3	8.1	1.4	6.7	82.7
Domestic air	1.9	1.5	0.7	1.7	58.8
Kenya Airways (Int.)	2.0	0.2	0.7	1.7	58.8
Car hire	2.9	1.5	0.3	1.2	80.0

Source : Economist Intelligence Unit (1979).

The estimate of 80% was criticized as being "wildly exaggerated" ²³

Apart from the doubts about the economic benefits, tourism is said to have adverse cultural and social effects:

"it is said to be distasteful to bring the very rich into countries that are very poor" ²⁴.

Indeed in recent years, official reservations have been explicitly made about further tourism development, with the government emphasizing on the need to balance economic benefits with social, cultural and environmental costs.

Summary

The industry has seen tremendous growth in terms of receipts and number of visitors. Tourism today is the most important foreign exchange earner after coffee and tea. The growth in number of visitors has however slowed down since the mid 1970s due probably to economic and political reasons.

The growth of the industry has also been accompanied by the greater diversification of tourist attractions and improvement in facilities and infrastructure. Today there is greater integration of Coastal tourism and upcountry tourism.

National policies on tourism development have also been changing over the years. The Government has been showing greater concern about the consequences of the exceedingly rapid growth of tourism that took place in the early 1970s. Policy is now geared towards controlled expansion in order to reduce the adverse social, cultural and political consequences of tourism development.

Notes

1. Raymond Noronha, "Social and Cultural Dimensions of Tourism", World Bank Staff Working Paper, No. 326 (Washington : The World Bank, 1979).
2. Esmond Bradley Martin, The History of Malindi (Nairobi : E.A.L.B., 1973), p.240.
3. The term is used in the modern sense, since the Kenya Coast was visited by people from many parts of the world as early as the pre-Christian times.
4. Esmond Bradley Martin (1973), p.250.
5. S.E. Migot-Adholla, Study of Tourism in Kenya with Emphasis on the Attitudes of Residents of the Kenya Coast (Nairobi : I D S, University of Nairobi, 1982), p.12.
6. J.P.B.M. Ouma, Evolution of Tourism in East Africa (Nairobi : EALB, 1970), p.22
7. Op.Cit., p.24
8. Republic of Kenya, National Development Plan, 1979 - 83, p.391.
9. S.E. Migot-Adholla (1982), p.18
10. J.P.B.M. Ouma (1970), p.77.
11. Republic of Kenya, National Development Plan, 1984 - 88.
12. S.E. Migot Adholla (1982), p.17.

13. According to Robert W. Lawson in "Tourism Research - break for thought" published in Development Forum, Vol. XI, No.5, June - July 1983; there are three broad classifications of tourists : luxury, enclave or "bubble" tourism entails the most conspicuous display of western affluence and is more individualistic. Mass or character tourism encompasses a larger group of not-so-wealthy travellers. Alternative or world traveller tourist spends very little money and usually portrays a frugal lifestyle by Western standards.
14. Republic of Kenya, The Economic Development of Kenya: IBRD Report 1962. The task of the mission was to undertake a general review of the economic potential of Kenya.
15. KTDC is the main channel through which public investment for promoting the industry passes.
16. S.E. Migot-Adholla (1982), p.29
17. Walter Elkan, "The Relation Between Tourism and Employment in Kenya and Tanzania", Tourism in Africa and the Management of Related Resources, Centre of African Studies, University of Edinburgh, May 1974.
18. Republic of Kenya, Economic Survey, 1984.
19. S.E. Migot-Adholla (1982), p.3
20. Republic of Kenya, National Development Plan, 1984 - 88 p.217.
21. Republic of Kenya, National Development Plan, 1970 - 74
22. S.E. Migot-Adholla (1982), p.5
23. Ibid.
24. Walter Elkan (1974), p.84.

CHAPTER THREE

TOURISM DEVELOPMENT AT THE KENYA COAST

Introduction

Chapter three deals with the development of tourism at the Kenya Coast. The Chapter is divided into two distinct parts. Part one will treat tourism in a regional context; looking at the various resources and attractions that make the Coast a tourist destination, and how these resources have been exploited. The second part of the Chapter will narrow down the perspective by looking at the study area - Malindi and its immediate environs. A general analysis of the physical, economic and social aspects of the area will be given before tracing the historical growth of tourism in Malindi.

Regional Context

Coast Province lies between the equator and latitude $4^{\circ} 50'$ South, and is bounded on the west by longitude $37^{\circ} 30'$ East and on the East by the Indian Ocean (see Fig. no. 3.1). The land rises gradually from sea level to 900 metres on the western boundaries of the province. Only the Taita Hills, which rise over 2,100 metres are significant relief exceptions.

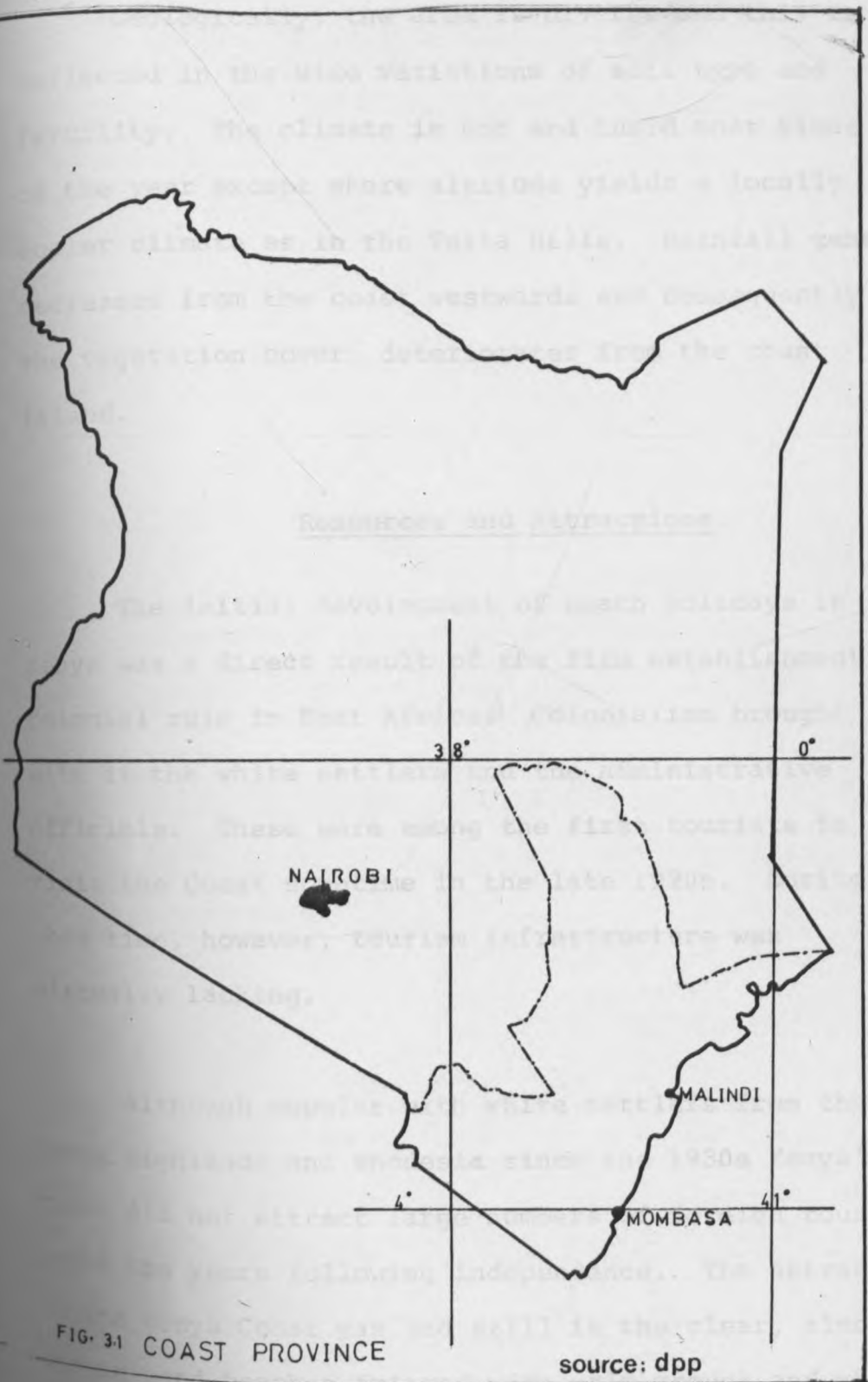


FIG. 3.1 COAST PROVINCE

source: dpp

Geologically, the area is diverse and this is reflected in the wide variations of soil type and fertility. The climate is hot and humid most times of the year except where altitude yields a locally cooler climate as in the Taita Hills. Rainfall generally decreases from the coast westwards and consequently the vegetation cover deteriorates from the coast inland.

Resources and Attractions

The initial development of beach holidays in Kenya was a direct result of the firm establishment of colonial rule in East Africa.¹ Colonialism brought with it the white settlers and the administrative officials. These were among the first tourists to visit the Coast sometime in the late 1920s. During this time, however, tourism infrastructure was virtually lacking.

Although popular with white settlers from the Kenya Highlands and Rhodesia since the 1930s Kenya's Coast did not attract large numbers of foreign tourists until the years following independence. The attraction of the Kenya Coast was and still is the clear, almost virgin sand beaches fringed with palm groves and the warm sea water sheltered by coral reefs. The close proximity of wildlife viewing gives beach holidays in Kenya an edge over other competing tourist destinations.

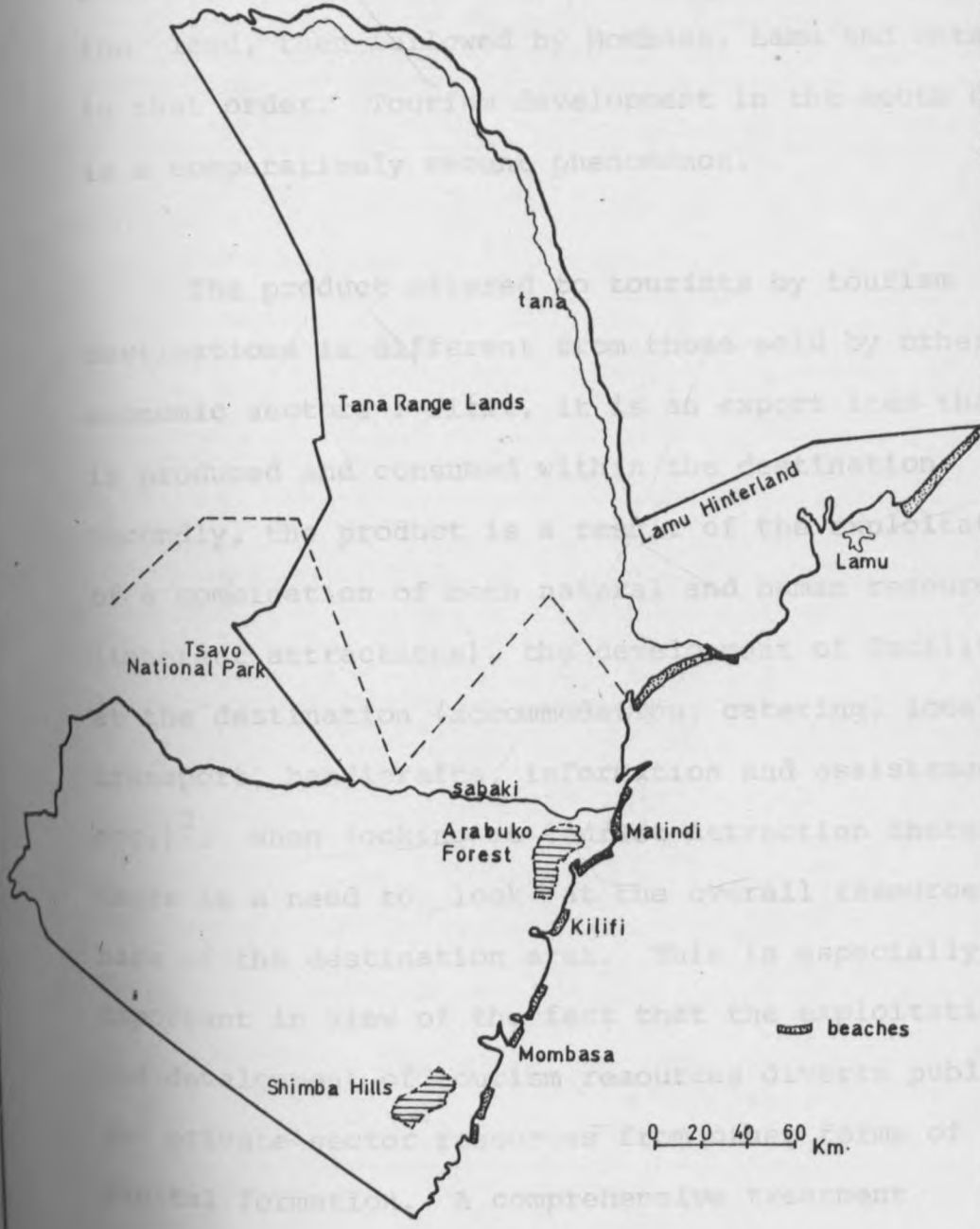


FIG. 3-2

COAST PROVINCE, RESOURCES

Coastal tourism can be differentiated between North Coast and South Coast. The earlier tourism development occurred in the North Coast with Malindi taking the lead, then followed by Mombasa, Lamu and Watamu in that order. Tourism development in the south Coast is a comparatively recent phenomenon.

The product offered to tourists by tourism destinations is different from those sold by other economic sectors : First, it is an export item that is produced and consumed within the destination. Secondly, the product is a result of the exploitation of a combination of both natural and human resources (inherent attractions), the development of facilities at the destination (accommodation, catering, local transport, handicrafts, information and assistance etc.)². When looking at tourist attraction therefore, there is a need to look at the overall resource base of the destination area. This is especially important in view of the fact that the exploitation and development of tourism resources diverts public and private sector resources from other forms of capital formation. A comprehensive treatment of the resource base also gives an indication of the yet to be exploited potentialities.

Map 3.2 gives the resource base of the Coast Province.

Beaches:

As already mentioned, the beaches are without doubt the most important asset at the Coast. Without these, the significant growth in visitors to the Coast and the traditional pattern of holiday making at the Coast by up-country people which established the trade initially would never have taken place. The position of the larger beaches is indicated on Map No.3.2.

Table 3.0: Length of Beaches

Kipini - Ras Kiongwe	30 km.
Lamu archipelago	40 km.
Ngomeni-Kipini	60 km.
Sabaki - Ngomeni	25 km.
Malindi	16 km.
Watamu	8 km.
Uyombo	2 km.
Kilifi	5 km.
Mtwapa - Kilifi	12 km.
Mombasa	14 km.
South Coast	35 km.
Total	247 km.

In addition to the beaches, there are a number of important tourist attractions in close proximity to the beach hotels.

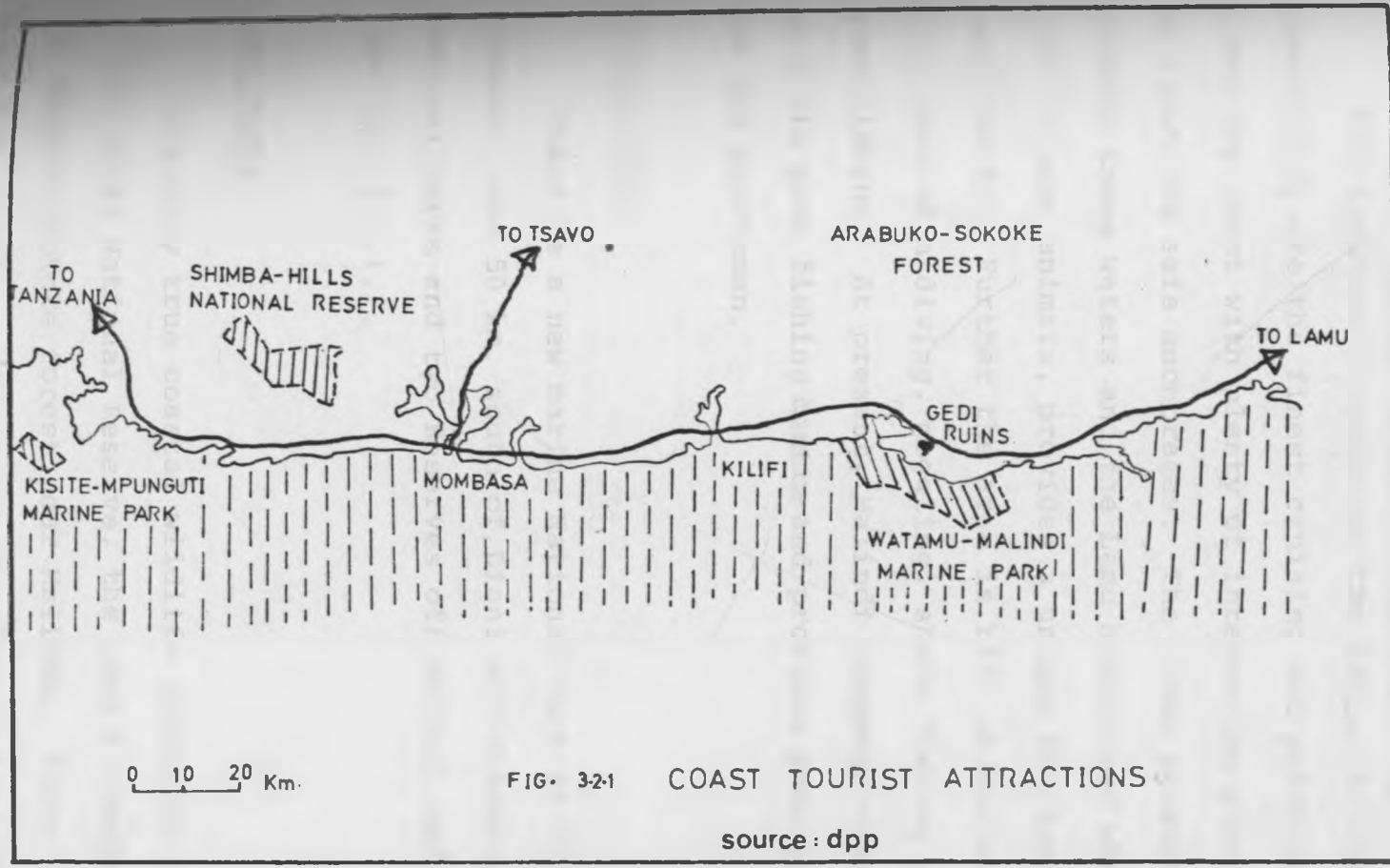


FIG. 3-2.1 COAST TOURIST ATTRACTIONS

source : dpp

Coastal Waters Suitable for Boating

The sheltered waters of the Lamu archipelago potentially are the finest cruising and yatching area along the Coast with plenty of interesting places to visit and safe anchorages. The close relationship between these waters and the Lamu hinterland which is rich in game animals, provides a unique development opportunity. Further the area is rich in marine life with good skin diving, goggling, shark fishing and game fishing. At present, Malindi competes with Mombasa as a big game fishing centre and provides good facilities for the sportsman.

Marine Parks:

There is a new marine National Park at Kisite-Mpunguti some 50 km. south of Diani off Shimoni, two National Parks and two Reserves off Malindi and Watamu (see Fig. 3.2.1.).

Game Parks

The only true coastal wildlife areas are the Shimba Hills National Reserve, the Lamu hinterland and Arabuko/Sokoke forest near Malindi. Tsavo National Park lies partly in the Coast Province and is the major game viewing and protection area.

Historical Sites:

The Coastal area is rich in remains of the Arab and Portuguese settlements established from the ninth century onwards. These historical sites are scheduled as protected under the laws of Kenya (Cap.215) and subsidiary legislation. The monuments include four abandoned town sites: Gedi, Ungwana, Shanga and Omere; two still partly inhabited : Pate and Siyu, and a number of mosques, houses, tombs and forts.

In addition to these main historical sites there are many other areas of potential cultural interest, particularly on the South Coast. Some of the sites still require excavation³. The Coastal tourist attractions are at present developed and integrated with the beach holidays to varying degrees.

Tourist Facilities and Infrastructure

Development of tourist facilities and infrastructure is not only a prerequisite to successful tourism but also an integral part of planning and development of tourist attractions. The growth of tourism creates a need for an improved infrastructure. It is impossible to realize progressive and vigorous tourism without the construction, institution and maintenance of the essential transport and service facilities which satisfy the visitors when they come.

Tourism facilities and infrastructure can be classified into:

- (i) the non-revenue-earning facilities infrastructure such as airports, roads, sewage systems, water supply etc; and
- (ii) the revenue-earning facilities such as hotels, restaurants, cinemas, theatres, sports etc.

The first category of facilities is normally developed by the government (public sector resources), while the second is usually through the private sector.

The growth of tourist facilities closely follows the development of tourism through the various stages (discovery, local response and initiative, institutionalization). During the early stages of tourism at the Coast tourism infrastructure was virtually non-existent. Development was initially quite slow and organic. For example in Malindi, up to the end of World War II there were only two small hotels (the present Blue Marlin and Lawford's)⁴. Access was provided by an earth road from Mombasa; the only air link was through a small air strip. However after Independence and with the introduction of cheap package tours there was a dramatic rise in the number of hotels at the Coast (especially North Coast), followed by improvements in road and air links and telecommunications services. Development of tourism and tourism facilities at the South Coast came much later in the 1970s.

Table 3:1 Hotel Beds Available and Occupied 1965-83

Year	Beach	Growth Rate%	Other	Growth Rate %	Total	Growth Rate %	Occupancy Rate %
1965	341	-	251	-	592	-	46
1966	407	19	224	-11	631	6	56
1967	561	38	301	34	862	37	47
1968	681	21	353	17	1034	20	48
1969	761	12	354	0.3	1115	8	50
1970	951	25	369	4	1320	18	53
1971	1050	10	364	-1	1414	7	56
1972	1493	42	379	4	1872	32	48
1973	1677	12	443	17	2120	13	46
1974	1995	19	498	12	2493	18	47
1975	2093	5	473	-5	2566	3	51
1976	2202	5	407	7	2709	6	53
1977	2268	3	510	0.6	2778	2	57
1978	2523	11	531	4	3054	10	57
1979	2382	-6	614	16	2996	-2	58
1980	2856	20	649	6	3505	17	63
1981	2959	4	652	0.5	3611	3	60
1982	-	-	-	-	-	-	-
1983	-	-	-	-	-	-	-

Source: Economic Surveys 1968 - 1983

Table 3.1 shows the growth of hotel beds at the Coast, with the most phenomenal growth being in beach hotel beds. Most of this growth came with the introduction of charter flights in 1965.

The development of internal transport networks has greatly facilitated the tourist industry and also benefitted other economic sectors. The most recent improvements include: the new bridges at Nyali and Mtwapa making the North Coast more accessible; improvements on the Kilifi and Likoni Ferries, upgrading of Mombasa and Malindi Airports. Moi International Airport (Mombasa) can now receive direct flights from Europe, while Malindi Airport can now cater for DC10 aircraft.

Despite improvements, the water supply situation at the Coast still remains as one of the biggest obstacles to further development. The Sabaki Water Scheme was designed to ease the problem in the North Coast.

Malindi and its Environs

Location

The town of Malindi is situated on the Coast of Kenya about 120 km. by road north of Mombasa. It is the second largest and also the second most prosperous town on Kenya's Coast after Mombasa. It is one of the ancient centres of trade and settlement, set up and successively occupied by Arab, Portuguese, British and German colonialists. Malindi was officially gazetted as a town in 1903⁵. Tourism is the fastest growing, and most valuable single industry of Malindi.

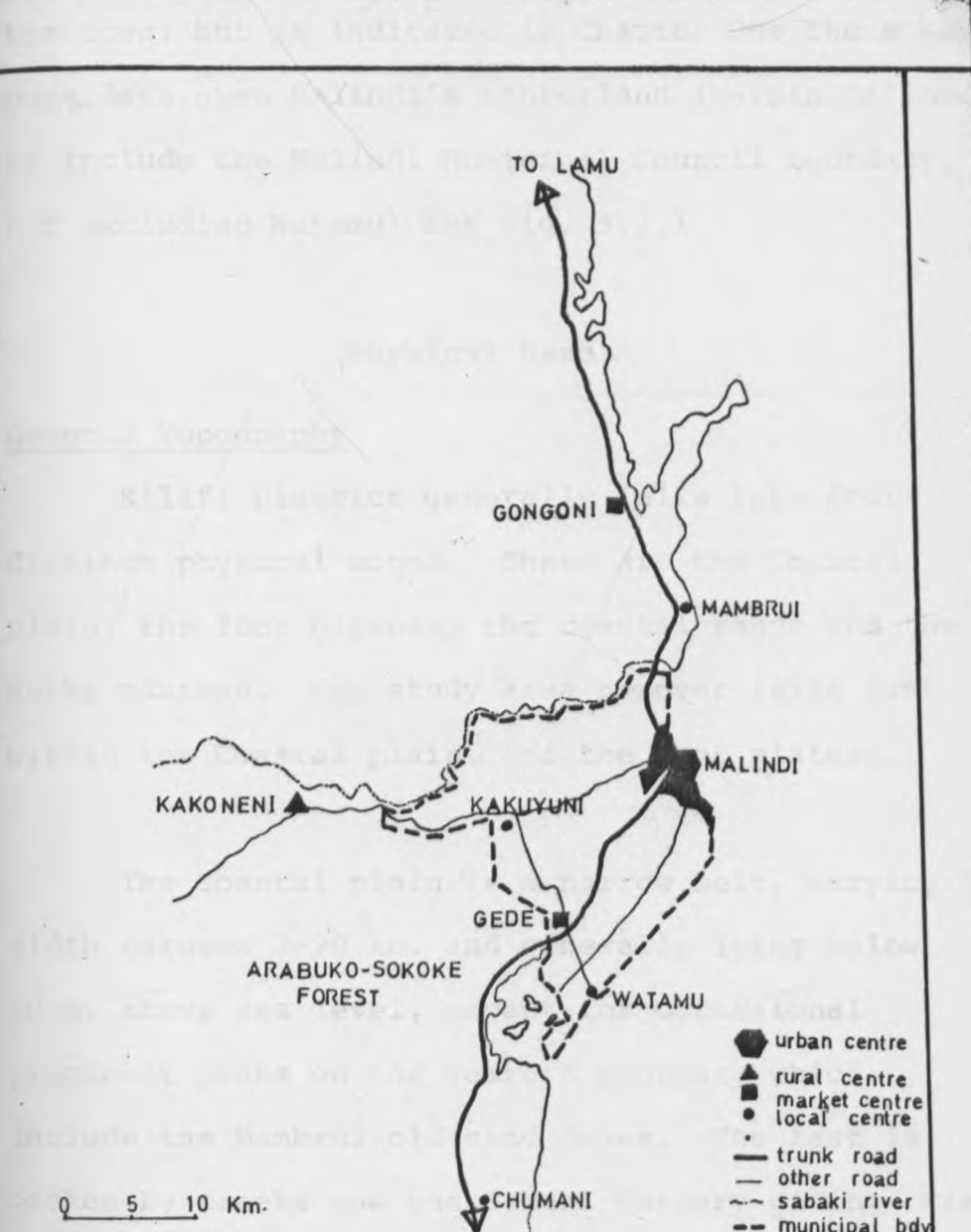


FIG. 3-3-1 LOCATION

source : dpp

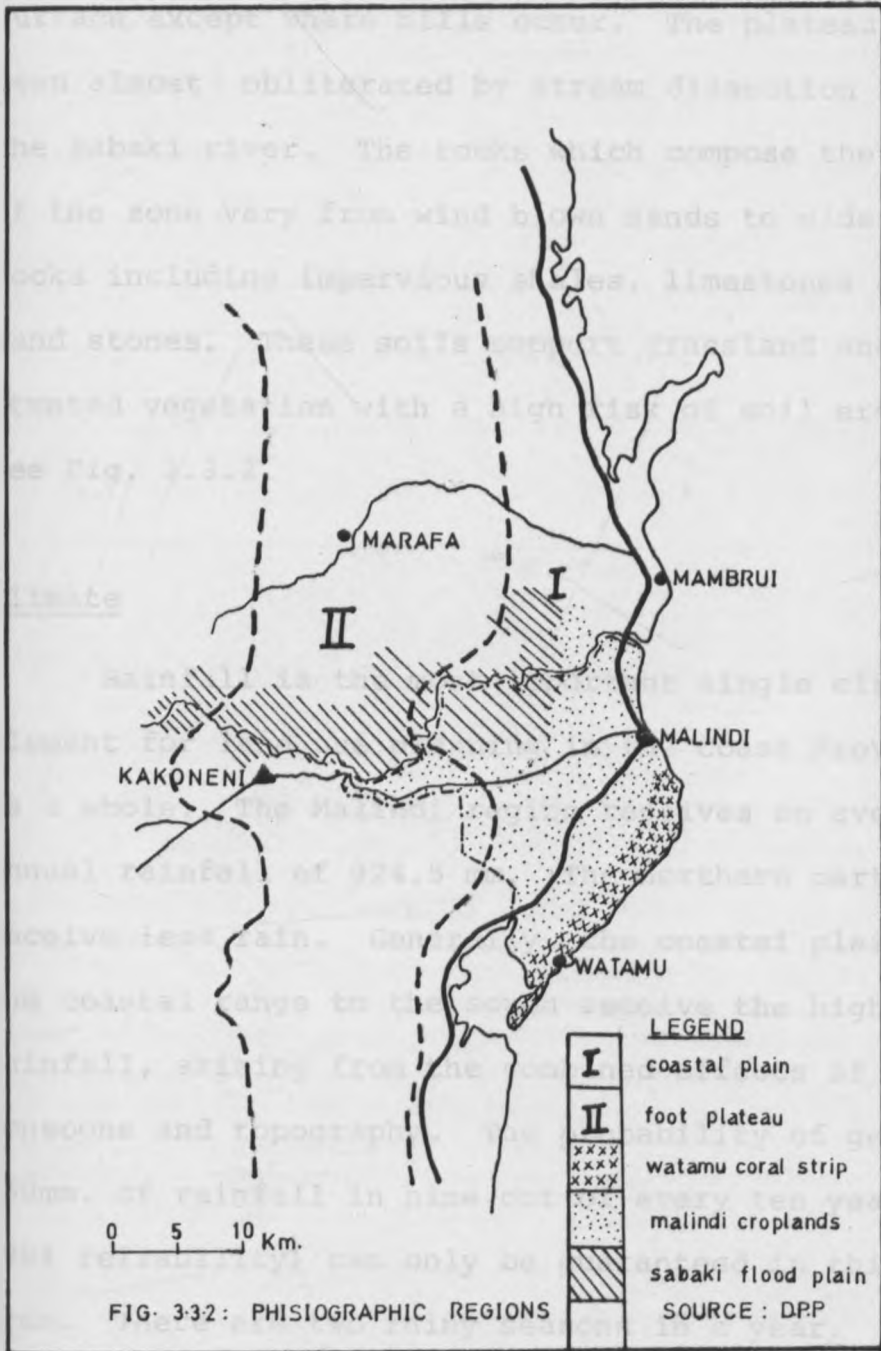
Most of the industry's activities are located within the town, but as indicated in Chapter One the study considers even Malindi's hinterland (herein defined to include the Malindi Municipal Council boundary, but excluding Watamu) See Fig. 3.3.1.

Physical Base

General Topography

Kilifi District generally falls into four distinct physical zones. These are the Coastal plain, the foot plateau, the coastal range and the Nyika plateau. The study area however falls just within the Coastal plain, and the foot plateau.

The Coastal plain is a narrow belt, varying in width between 3-20 km. and generally lying below 30 m. above sea level, except for occasional prominent peaks on the western boundary which include the Mambrui old sand dunes. The rest is broken by creeks and the Sabaki Estuary giving rise to excellent marine and estuarine swamps, yielding mangrove forest and untapped potential for marine culture (Ngomeni). Geologically the zone is composed of triassic sediments of marine and deltaic origin and include coral limestone, marble, clay stones and other alluvial deposits, yielding deep soils which support intensive agriculture.



The foot plateau lies at an altitude of 60 to 135m.; and is characterized by a flat planned off surface except where hills occur. The plateau has been almost obliterated by stream dissection by the Sabaki river. The rocks which compose the geology of the zone vary from wind blown sands to older rocks including impervious shales, limestones and sand stones. These soils support grassland and stunted vegetation with a high risk of soil erosion. See Fig. 3.3.2.

Climate

Rainfall is the most important single climatic element for land use planning in the Coast Province as a whole. The Malindi region receives an average annual rainfall of 924.5 mm. The northern parts receive less rain. Generally, the coastal plain and coastal range to the south receive the highest rainfall, arising from the combined effects of monsoons and topography. The probability of getting 750mm. of rainfall in nine out of every ten years (90% reliability) can only be guaranteed in this area. There are two rainy seasons in a year. The long rains come in March to May and short rains in October-November.

The climate is generally hot and humid all the year round. The mean, daily temperature is 22.0°C. minimum and 29.5°C maximum. Average relative

humidity in the area is 65% at 15.00 hours, but decreases as one moves to the hinterland.

Drainage:

The area forms the southern part of the Athi catchment area which is drained by the Galana (Sabaki) river. The Galana is perennial and is flooded twice a year for periods ranging from 2-8 weeks, resulting in serious pollution of beaches in Malindi Bay, and destruction of settlements on the flood plain.

Social Profile

Population

According to the 1979 Population Census, the total population of Malindi Division was 105,806, Malindi Town accounting for 23,275. The following table gives population census and projections both for Malindi rural and Malindi Town.

Table 3.2: Population Dynamics - Malindi

	CENSUS				POPULATION PROJECTION *			
	1969	1979	1983	1984	1985	1986	1987	1988
Malindi(rural)	80,255	105,806	127,165	131,527	136,038	140,704	145,530	150,522
Malindi Town	10,757	23,275	28,028	28,990	29,984	31,012	32,076	33,176

* Assuming the same growth rate of 3.43%, this probably leads to an underestimation of the future population of Malindi Town.

Source: Kilifi District Development Plan.

According to Municipal Council sources the population within the Council's boundary is about 81,800. Overall the urban population has been growing at slightly over 9% per year, and at this rate the urban population will rise to about 98,472 people by 1988.

A significant pattern of internal migration within the District appears to have been established with people moving from the heavily populated south and arid hinterland areas to coastal and marginal zones around Malindi. The major factors contributing to this migration include:

- (i) search for permanent water supply
- (ii) looking for employment opportunities
- (iii) search for better land for cultivation.

General Economic Development

Although this thesis is primarily concerned with the area bound by the Malindi Municipal boundary, this section will look at general economic development in the sub-district. The sectors considered are agriculture, fishing, commerce and industry. Tourism will be treated separately. These economic sectors are considered to be the most important in the area.

Agriculture:

Agriculture is historically the basis for the wealth of Malindi and most of the other economic sectors are dependent to some degree upon it.⁶ Malindi's prosperity was based on the agricultural produce which came from large plantations with a great variety of fruits, vegetables and meats. These plantations were worked by slaves. There was a decline in agricultural production after the abolition of the slave trade.

The picture is of course very different today. Some of the plantations still do exist, the majority owned by Europeans and Asians. Records indicate that the Giriama (the major tribe in the area), began to play a significant role in agricultural production in the area from around 1918. Since 1963, the number of Giriamas moving into the coastal strip looking for better cultivation land has increased. The population of the sub-District expanded dramatically from 40,000 in 1949 to 93,000 in 1968⁷. In spite of that increase, agricultural production has generally remained stagnant. The major causes for the stagnation in agriculture are:

- (i) the uncertainty and insecurity of the present land tenure system in the more fertile coastal strip. This is because most of the land in

the ten-mile strip is Arab-owned, making the majority of Giriama who moved into the area squatters. The Gedi Settlement Scheme began in 1938 was designed to resettle the squatters. The scheme has however not been able to adequately deal with the problem. In 1969 it was approximated that there were 25,000 squatters in the coastal zone ⁸. Outside the coastal zone only the croplands and to a lesser extent, the Sabaki flood plain, have medium to high potential soils. The area will increasingly have to rely on these areas for large scale production of cash crops and food crops (maize, rice, millet, etc.).

- (ii) the unwillingness of the local people to modernize their methods of farming.

About 90% of the total population is engaged in subsistence agriculture.

Fishing

Although fishing has been carried out in Malindi for centuries, records indicate that it became an important industry towards the end of World War II ⁹. This is one activity that is localized around Malindi town. As an industry it saw major expansion between 1948 and 1958 principally due to introduction of new fishing equipment. However, since the 1960s, fish

landings have not increased dramatically although the value of fish keeps on rising slowly. The amount of fish landed and the number of boats in operation seem to fluctuate from year to year. For example in 1982 there were 220 boats in operation and the fish landed was about 932 metric tonnes; while in 1983 the number of boats was 93 with a corresponding catch of 584 metric tonnes valued at KShs. 4 million (Fisheries Department Malindi).

Most of the fishermen in Malindi belong to the Malindi Fishermen's Cooperative Society which handles most of the marine fish production. Comparatively the fishing industry in Malindi is still underdeveloped. The biggest craft in Malindi is the ten-ton "Mashua" - a plank built boat with a square transom stern and a perpendicular cutwater. Some two studies done by FAO in 1968 on the fishing industry in Malindi recommended improvements on fishing craft (preferably motorized), and also improvements on the traditional techniques practised by most of the fishermen. These recommendations have largely been un-implemented.

Commerce and Industry

In the town of Malindi itself, more people are directly involved in retail trade and services than in any other sector of the economy. This is because the sector inevitably includes sub-sectors that form the largest and most important industry in Malindi - tourism.

Most of the major businesses are owned by foreigners: mainly German and Italian nationals who spend their time in between Europe and Kenya. A recent survey by the Weekly Review showed for example, that there are six boutiques in town operated by Italian nationals, nearly all contractors, estate agents and tour operators are either German or Italian, and even own beer halls. The Africans operate the small boarding houses and retail shops¹⁰.

There are a total of 22 manufacturing concerns in the town, of which about half are owned by Asians. These are very small scale industries, the biggest being Malindi Oil Industries (dealing in oil products) and Kurawa Industries Ltd. (manufacturing salt).

Tourism Development in Malindi

Historical Growth of Tourism in Malindi

The town of Malindi, as mentioned earlier, is one of the ancient centres of trade and settlement, set up and successively occupied by Arab, Portuguese, British and German colonists. The fabric of the town today in common with other important centres such as Da-es-Salaam and Mombasa, reflects the various influences of both historic and contemporary ways of life in its delivery of architecture and land-use.

Compared to the founding of the town ¹¹, tourism in the modern sense is a very new economic activity in Malindi. Before tourism became the main growth industry, Malindi's prosperity was based on agriculture, fishing and the dhow trade. The beginnings of the tourism industry in Malindi can be traced back to the early 1930s immediately after the World Depression. The World Depression had severely affected Malindi's agriculturally based economy. Agricultural exports from Malindi had fallen from £38,000 in 1924 to £8,350 in 1935 ¹². The emergence of the tourism industry was therefore seen as playing a major role in the revitalisation of Malindi's economy.

Tourism development in Malindi was initially quite slow and organic with no organized accommodation and catering. By the end of World War II, there were only two small hotels in Malindi (Brady's Palm Beach Hotel, now the Blue Marlin Hotel, and Lawford's Hotel) and some bungalows ¹³. Most of the tourists then were European settlers from up-country Kenya and Rhodesia who would come to Malindi to spend a short holiday by the seaside.

Malindi's reputation as a holiday resort shot up because of its beautiful seaside location, its sandy beaches and its surf. Malindi also became internationally known as the best for deep-sea fishing

on the East African coast. The 1936 Malindi Annual Report indicates that the two hotels accommodated a total of 596 visitors that year, with the ten bungalows fully occupied for most of the cool season.

After World War II, Malindi grew very fast to become the second most important town on the Kenyan coast after Mombasa, no doubt due to the expansion of tourism. After the war two more hotels were built (Sindbad, and Eden Roc) and in 1948 both hotels were greatly expanded. The population of the town grew from 2,190 (1943) to 3,292 (1948), and went up to 5,818 (1962). Ethnically, the largest percentage increase was that of the European population. This was probably due to the fact that during the 1950s many white settlers left their land up-country (as a consequence of the Mau Mau rebellion) and bought land at the more peaceful coast or just retired in Malindi ¹⁴. This influx of new residents has become very important to the industry in Malindi since it has created a small sub-sector in Malindi's economy known as "residential tourism" that is becoming increasingly important, and could be a sign of transition from stage III to IV (saturation and decline). In the early 1960s, this kind of influx had the effect of infrastructural improvements in time for the tourist "boom" of the early 1970s.

In the early 1960s, the fifth tourist beach hotel was built, the Driftwood Beach Club. The real "boom" came after the advent of charter flights from Europe in 1965. This resulted in a tremendous amount of expansion in all the hotels. In 1964, the five hotels in Malindi area provided 234 beds. These hotels were so expanded that by 1969 there were a total of 614 beds in Malindi¹⁵. By 1975, the 15 or so hotels in Malindi had a total of about 1,000 beach hotel beds.

Malindi now has a highly developed tourist industry and is well known in international markets. It possibly accounts for 10% of Kenya's total tourism¹⁶. Although Malindi is comparatively small, it is considered to be the nearest thing to a tourist complex in Kenya, and as such is unique. It is now believed that Malindi's tourism development has reached saturation point and is on the decline. The 1979 study by KTDC on Beach Hotel capacity at the Coast came up with the conclusion that Malindi was unsuitable for further tourism development mainly due to infrastructural constraints. Recent years have seen a decline in occupancy rates in Malindi hotels. Some people in the industry blame the decline on the government ban on air charters, while others point at the mushrooming of cottages and apartments as the cause. Whatever the reason, it seems clear that tourism is entering a new phase in Malindi.

Historical Growth of Malindi Town

Malindi town is one of the ancient centres of trade and settlement on Kenya's Coast. The town was probably founded in the 13th Century¹⁷. Since its founding the town has been successively occupied by Arab, Portugues, British and German colonists, and in the process going through several phases of expansion and decline. Malindi was officially gazetted a town in 1903.

Before the emergence of the tourist industry in Malindi, the economy was based on agriculture, fishing and trade with other towns on the East African Coast. Malindi is a historical town and its physical development over the years has rested on five zones clearly defined by their physical characteristics (~~see Fig. 3-4.3~~):

Shella (Old Town), Barani (Town Centre), Majengo (Malindi West), Malindi North and Malindi South. These zones reflect the various influences of both historic and contemporary ways of life in their delivery of architecture and land-use.

Prior to the development of tourism, the first three zones, more especially Shella and Barani, formed the main fabric of the town. These zones are characterised by several tightly packed groupings of Swahili houses, built without proper planned basic infrastructures.

These areas are used fo both for residential and commercial activities.

The other two zones, Malindi North and Malindi South owe their development directly to the emergence of Malindi as a major holiday resort area. Malindi North has grown to become the main sea-side resort area with high class settlement and the famous tourist class hotels and clubs. This area has also developed into a modern shopping and service centre and is increasingly encroaching into the Majengo area. These developments are clearly distinct from the kind of commercial accretions found in parts of the Old Town (most of which are accommodated in "Swahili" structures).

Malindi South is mainly developed along the Coast with high class housing. Most of this high class residential development is as a direct result of tourism development and can be traced back to the early 1930s (which was also the beginning of the tourist industry).

The present physical development of Malindi is due to the Tourist Industry as can be seen from the extensive ribbon development along the coast. (see plates 2-4). Even the high density residential development to the west of the town can also be attributed to the growth of tourism, with an increasing

number of migrants from the rural areas looking for jobs in the tourist and service industries.

Resources and Attractions

When treating the attractions of Malindi two important points emerge. First, although the tourist destination is Malindi town, what actually tourists come to see might cover a much bigger region (covering the whole of Kilifi District and may be beyond). With the diversification of tourist attractions and improvements on infrastructure this area might grow bigger. Secondly, there are basically two different types of tourists who come to Malindi : one, the East African resident who spends most of his time in Malindi, and two, the overseas visitor who combines the beach holiday with game viewing.

The main attractions in Malindi have always been the warm weather, sunshine, the beaches (except for the highly developed Malindi area), coupled with a good collection of historic sites, monuments, and an indigenous people richly endowed with traditional songs and folklore, which collectively contribute to the vast natural potential for tourism, only part of which is currently being exploited.

Wildlife is an important resource in the

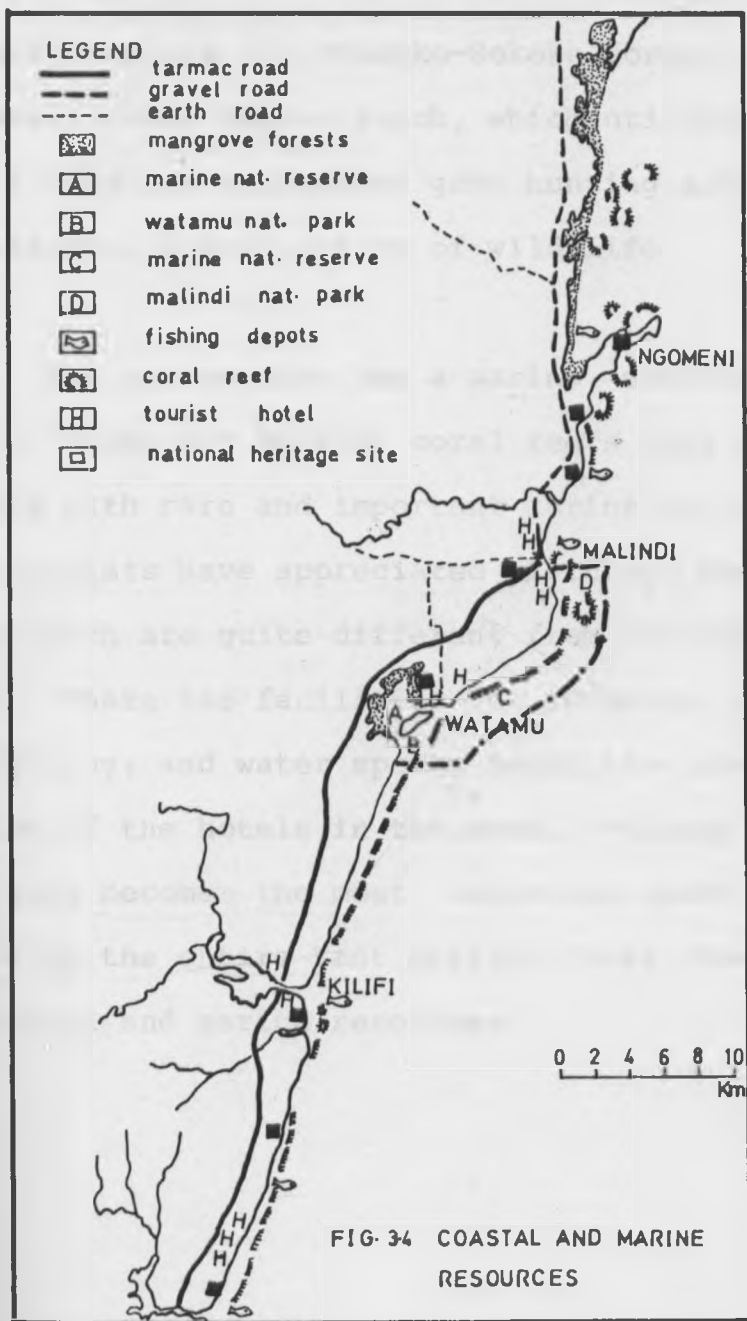


Fig 3.4

SOURCE: KILIFI DEAR, 1984

district : ranging from the big game species to the smaller animals. Some of the areas abounding with wildlife include the Arabuko-Sokoke forest, and the privately owned Galana Ranch, which utilises most of its land for controlled game hunting safaris and experimental domestication of wild life.

The region also has a marine environment at the Watamu and Malindi coral reefs that are endowed with rare and important marine species. Many tourists have appreciated visiting the marine parks which are quite different from the land-based parks. There are facilities for swimming, goggling, photography; and water sports facilities are offered by many of the hotels in the area. Malindi has over the years become the most important sport fishing centre on the entire East African Coast (See fig. 3.4 on coastal and marine resources).

Table 3.4.2 Visitors to Gede National Monument and Malindi/Watamu Marine National Parks

Year	Gede Visitors	Malindi/Watamu Visitors
1976	29,396	NA
1977	25,801	37,257
1978	29,747	42,232
1979	36,838	48,830
1980	34,088	55,106
1981	NA	47,135
1982	NA	46,608

Source: Central Bureau of Statistics.

Summary

Coastal tourism has recently seen a great diversification in terms of exploitation of resources and attractions. Although the main attraction of the Kenya Coast still remains the clear sand beaches, and warm sea water, this attraction has increasingly been integrated with the nearby wildlife sanctuaries, marine parks, historical monuments and game fishing. This has resulted in a beach holiday being even more attractive; and coastal tourism generally accounting for the biggest contribution to Kenyan tourism.

Tourist infrastructure and facilities have also grown with tourism, with great improvements in internal

and external transport networks, telecommunications. Only the water supply situation still remains as the major obstacle to further development.

Tourism development in Malindi can be seen to have spearheaded coastal tourism generally. It is now one of institutionalized tourist resorts at the Northern Coast of Kenya, catering mainly for package tourists from over-seas. The Malindi area is considered to be the nearest thing to a tourist-complex in Kenya. Tourism in Malindi has now reached the stage of a fully organized business, although some signs of decline are showing in hotel occupancy. The trend now is in development of "residential tourism" with cottages and apartments being very popular.

Malindi, presently owes its physical development to tourism. Even the status of the town seems to have closely followed the path of tourism development: urban council status (1963), Town Council (1974), and Municipal Council (1981).

Notes

- 1.
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3. Kenya Coast Planners, Diani Resort Complex Report
4. E.B. Martin (b), The History of Malindi (Nairobi: EALB, 1973).
5. E.B. Martin (a), Malindi : Past and Present (Nairobi: National Museums of Kenya, 1970).
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7. Op.Cit, p. 116
8. Op.Cit, p. 122.
9. Op: Cit., p. 189.
10. The Weekly Review, Nov. 23, 1984.
11. Malindi was probably founded in the 13th century according to E.B. Martin's works.
12. E.B. Martin (c), "The Urban Development of Malindi from 1500 - 1970", Plan East Africa, Vol. 3 No.1, Jan./Feb. 1972.
13. KNA, Malindi Annual Report 1936.
14. S.E. Migot-Adholla, Three Stages of Tourism Development.
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16. KTDC, Report on Capacity of Kenya Beach Hotels, 1979.
17. E.B. Martin (c).

CHAPTER FOUR

IMPACT OF TOURISM DEVELOPMENT IN MALINDI

Introduction

The objectives of this study was to measure impact of tourism in Malindi on the following aspects:

- (i) Employment (both direct and indirect).
- (ii) Other sectors of the economy; i.e. its linkage effects.
- (iii) Development of infrastructure.
- ~~(iv)~~ Land-use and physical development of the town.
- (v) Socio-cultural impacts.

This chapter analyses the above impacts with respect to Malindi. The chapter is therefore divided into five major sections.

Ideally, any study of impact should have as its reference point a fairly well documented description of the situation as it existed before the introduction of the phenomenon whose impact is to be assessed. As was mentioned in the introductory chapter, such baseline data were not available, and that is partly the reason for setting the datum at 1968 instead of 1930 (which is regarded as the year tourism started in Malindi)¹. Even then, there are no reliable data specifically for Malindi on all the aspects considered in this study, and therefore, it was found necessary

sometimes to improvise with guesstimates.

The approach of the study was divided into two parts. First, the use of questionnaires, interviews (formal and informal) in order to get a picture of the existing situation. Secondly, the use of official government reports, and other publications for information covering the preceding years in order to come out with a historical analysis of the impact.

Impact on Employment

The purpose of this section is to analyse the impact tourism has had on employment in Malindi. Employment was differentiated between direct employment (i.e. employment within subsectors of the tourism industry such as hotels, bars and restaurants, tour operators, night clubs, gift shops etc.), and indirect employment (i.e. employment within sectors of the economy that are essentially non-tourist in nature but partially benefit from the industry (e.g. construction land and estate agents, grocers, boutiques, carpentry etc.)).

The study's emphasis was on total number of workers within a certain subsector, rather than the incomes generated. The reason for this approach was to reduce the risk of unreliable information (especially from the self-employed), and, also simplification of

of the analysis. However, the information on hotels' employment structure was disaggregated into the various grades in order to give a general idea on the level at which locals are employed.

Most of the data on employment were obtained from the District labour office and in some instances corroborated by figures from the questionnaire. The Central Bureau of Statistics Reports on wage employment census formed the basis for the historical analysis for the period 1968-1978. The hotel questionnaire which among other things asked for the hotels' employment structure (see Appendix 1) was sent out to six hotels; three responded (Lawford's, Sindbad, and Eden Roc).

Findings

The tourist industry, earlier defined to include subsectors such as hotels, restaurants, shops, bars and restaurants etc., has for a long time been the largest single employer in the town's modern sector. The hotels are the major source of wage employment in Malindi, and even in Kilifi District as a whole, although over 90% of the population are still dependent on the agricultural sector ².

In 1968 the five international hotels in Malindi employed 321 persons, while the smaller hotels employed

Table 4.1: Employment in Tourism Sub-Sectors in Malindi - 1968 and 1984

Type of Business	1968	1984/	% increase
D Hotels	387	639	65.1
D Bars & Restaurants (+ casino)	42	105	150.0
D Nightclubs	9	30	233.3
D Gift shops ²	29	35	20.7
D Curio stalls	41	95	131.7
D Tour operators	43	91	111.6
D Cafes	4	10	150.0
D Safari Boutiques	12	35	191.7
ID Land & Estate Agents	5	20	300.0
ID Construction	126	300	138.1
ID Furniture	15	30	100.0
D Shell-collectors & retailers	NA	19	-
ID Grocers ¹	6	13	116.7
ID Fruit stalls ³	5	30	500.0
ID Butcheries	21	25	19.0
ID Bakeries	-	-	-
D Miscellaneous (Golf club, sea-fishing club)	11	15	-
Total	756	1492	

Source: 1968 data from E.B. Martin's History of Malindi.

1984 data from field survey conducted by author.

Key to Table:

D - Direct employment

ID - Indirect Employment

1. - Exclusive grocers, catering mostly for tourists

2. - Well-established gift shops, operated mainly by Asians and Foreigners.

3. - Apart from main market. These stalls are located near hotels

66 persons; making a total of 387 employed directly in the hotels ³. In 1984 there were about 10 tourist class hotels (including the Blue Marlin - now closed for renovations and rebuilding into an apartment hotel)⁴. Together, these hotels and the smaller establishments (which also accommodate tourists especially in the peak season) employed 639 persons - an increase of 65% over the 1968 figure (see Table 4.1). In all the three hotels about 98% of the employees were local residents employed as stewards, cleaners, barmen, cooks etc. The management was also invariably composed of local residents (see also Table 4.2).

Table 4.1 also shows tremendous growth in employment in other sub-sectors, especially so with those not directly linked with tourism e.g. sale of fruits (500%). Recent years has also seen the phenomenal rise in the number of bars, restaurants, and nightclubs operating outside the hotels hence generating more employment.

An analysis was also made of the growth of wage employment in the tourism sector as compared to other sectors in Malindi from 1968 to 1978. The data for Malindi was further compared with similar data for Kericho (a town of similar size to Malindi - in terms of population), to appreciate the special role tourism plays in the economy of Malindi as an employer. The

analysis is based on data collected by the Central Bureau of Statistics from 1968- to 1978 on wage employment by industry and main towns in Kenya ⁶.

In 1968 a Ministry of Tourism Survey of the employment structure in the hotel industry in Kenya showed that most of the assistant managers and administrators were expatriates. A similar study by Prof. W. Elkan in 1972 also showed a domination of the industry by expatriates.

Table 4.2 Employment in the hotel industry by occupation and race 1972⁵.

	Total	Non Africans Expatriates citizens)	Afro- Kenyans	% of Afro- Kenyans of Total
Management	284	192 (118)	92	32
Front desk, reception	534	41 (5)	493	92
Accountants, secretaries clerical staff	286	46 (9)	240	84
Restaurant, bar, room service,	2597	36 (23)	2561	99
Kitchen	1613	36 (16)	1577	98
Others	3592	62 (12)	3530	98
Total	8906	413 (183)	8493	95

Source: Prof. W. Elkan's 1972 Survey adapted from
Tourist Consult Working Paper 1979 page 14.

Over time, the number of Kenyans employed in tourist establishments has increased significantly. There is no past record of the employment structure in the Malindi hotels, but the three hotels that responded to the hotel questionnaire had their top managers as Kenyan Africans.

Sector H in table 4.3 and sector F in table 4.4 are the two sectors more directly associated with tourism. The two tables reveal that there was a great expansion in employment in these sectors in Malindi between 1968 and 1974, averaging about 170% per year; followed by a reduced rate of growth and decline from 1975 onwards. Kericho shows a growth rate of about 30% per annum between 1968 and 1974! This is as expected since Kericho is not such an important tourist destination area. The other sectors in Malindi which are also indirectly linked with tourism e.g. construction and Transport show similar trends although at much lower levels.

The decline after 1975 could be due to a multitude of reasons ranging from effects of world-wide recession, or inappropriate aviation policy (affecting package tours), to saturation of the market in Malindi.

There is obviously a need for further research in this area.

Table 4.3 : Wage Employment by Industry in Malindi and Kericho, 1968 - 1971

SECTOR	MALINDI				KERICHO			
	1968	1969	1970	1971	1968	1969	1970	1971
A	37(-) *	35(-)	45(-)	48 (-)	313(-)	300(11)	350(12)	335(-)
B	- (-)	-(-)	-(-)	- (-)	27(1)	24(1)	25(-)	15(1)
C	64(6)	74(17)	86(12)	94(41)	435(57)	485(36)	646(29)	524(40)
D	5(-)	16(2)	25(3)	29(3)	379(2)	225(1)	549(2)	868(6)
E	5(-)	5(-)	10(-)	15(-)	32(-)	35(-)	35(-)	40(-)
F	74(26)	82(55)	84(77)	89(90)	423(177)	375(126)	472(78)	326(85)
G	113(6)	104(9)	105(9)	112(7)	98(13)	82(15)	107(13)	104(4)
H	980(15)	987(23)	1,010(21)	1,430(19)	2,633(73)	2,642(25)	1,996(24)	2,018(17)
Total	1,278(53)	1,303(106)	1,365(122)	1,817(160)	4,340(323)	4,168(215)	4,180(158)	4,230(153)

Source: C B S 1968 - 1971.

()* Self-employed.

Key for table 4.3

- A: Agriculture:- agriculture and livestock production in large farms, agricultural services, processing, ocean and coastal fishing, logging etc.
- B: Mining and Quarrying
- C: Manufacture
- D: Construction
- E: Electricity and Water
- F: Commerce: Wholesale and retail trade, photographic goods, banks, and other financial institutions, House and Estate agents, Textiles and clothing, Food, Drink and Tobacco. (This sector contains quite a number of activities that are indirectly linked with tourism).
- G: Transport: Road, ocean, water and Air transport, Omnibus operators, services incidental to transport, storage and warehousing, communication (also linked with tourism).
- H: Services: Government services, Advert. services, theatres, cinemas, recreational services, restaurant and similar services, hotels and other lodging services, hostels, launderies, barber and beauty (Directly linked with tourism).

Table . 4.4: Wage Employment by Industry in Malindi and Kericho, 1972-1978

SECTOR YEAR	MALINDI							KERICHO						
	1972	1973	1974	1975	1976	1977	1978	1972	1973	1974	1975	1976	1977	1978
A	51(1)	58 (-)	60(-)	78(-)	68(-)	80(+)	306(1)	319(-)	218(-)	15(-)	9(-)	1(-)	11(-)	206(-)
B	(-)	(-)	(-)	(-)	(-)	(-)	(-)	27(+)	32(-)	21(-)	24(1)	32(1)	22(-)	22(-)
C	54(8)	53(19)	56(185)	40(76)	50(11)	53(101)	43(144)	796(41)	683(40)	339(230)	183(216)	210(237)	130(284)	635(290)
D	8(-)	8(-)	23(-)	18(-)	94(-)	123(-)	103(-)	25(-)	26(-)	25(-)	56(-)	52(-)	49(-)	55(-)
E	48(3)	62(4)	95(4)	60(3)	62(3)	64(9)	145(5)	714(8)	680(6)	222(8)	230(3)	198(3)	179(6)	60(9)
F	89(404)	198(491)	633(718)	942(625)	661(863)	557(751)	685(1031)	206(474)	273(561)	372(1120)	386(719)	363(931)	372(1367)	293(136)
G	70(7)	76(14)	136(42)	112(36)	144(14)	170(18)	158(18)	132(-)	128(8)	292(45)	300(178)	295(187)	393(197)	355(4)
H	141(14)	105(17)	89(18)	113(21)	124(16)	111(17)	127(14)	59(1)	119(4)	135(5)	136(7)	166(20)	168(20)	183(17)
I	1596(116)	1392(93)	1174(104)	1784(63)	1819(132)	1919(58)	2334(88)	2065(239)	2118(274)	986(196)	1236(192)	1435(262)	1246(310)	1838(31)
TOTAL	2087(553)	1952(638)	2266(1071)	3147(824)	3022(1139)	3077(955)	3901(1301)	4343(764)	4277(893)	2407(1604)	2560(1316)	2752(1641)	2570(2184)	3647(20)

Source: C B S 1972-1978

Key for Table 4.4

- A: Agriculture and Forestry
- B: Mining and Quarrying
- C: Manufacture
- D: Electricity and Water
- E: Construction
- F: Wholesale, Retail, Restaurants and Hotels
- G: Transport and Communications
- H: Financing, Insurance, Real Estate
- I: Community and Social Services.

Sector H in table 4.3 and sector F in table 4.4 are the two sectors more directly associated with tourism. The two tables reveal that there was a great expansion in employment in these sectors in Malindi between 1968 and 1974, averaging about 170% per year; followed by a reduced rate of growth and decline from 1975 onwards. Kericho shows a growth rate of about 30% p.a. between 1968 and 1974! This is as expected since Kericho is not such an important tourist destination area. The other sectors in Malindi which are also indirectly linked with tourism e.g. construction and Transport show similar trends although at much lower levels.

The decline after 1975 could be due to a multitude of reasons ranging from effects of world-wide recession, or inappropriate aviation policy (affecting package tours), to saturation of the market in Malindi. There is obviously a need for further research in this area.

Linkage with other Sectors of the Economy

It is the purpose of this section to show how tourism has affected other sectors of the economy in Malindi. One of the most desirable indirect effects of tourism is the stimulation of other economic sectors such as agriculture, light industry, commerce and other ancillary industries that feed directly into the tourist industry. The sectors studied were agriculture, fishing, industry and commerce. The parameters that were considered to indicate growth or non-growth included production, number of establishments, employment and purchases from hotels and tourists.

Agriculture

Although the study area is much smaller, agriculture as an entity must be considered in the whole sub-district. The approach was to look at agricultural output from 1968 to the present day, especially for products that are utilized by the hotel industry. Greater use of local agricultural products by the hotels is also an indicator of impact. The approach is general and exploratory since the agricultural sector is not so developed in the area.

Over 90% of the rural population are engaged in agricultural and livestock production. Several general types of agricultural production systems can be

identified in the area including small holder mixed agriculture, large commercial estates, commercial ranches and pastoral systems. The dominant type is small-holder farmer along the coast and in the coastal uplands. A number of settlement schemes (e.g. Gedi Settlement Scheme) have been established in these areas mainly to resettle squatters. There are very few large scale farmers in the area.

The majority of farmers plant food crops such as maize, beans and cassava and some cash crops including cashewnuts, cotton, coconut, and samsame. Many farmers have a few livestock. Some of the crops that are grown on a commercial basis include paw-paw, pineapple, mangoes, melons, cucumber and vegetables.⁷ These are grown mainly for the hotel industry in the whole district, and some exported outside the district.

E.B. Martin in 1968 noted that agricultural production in the sub-district had become stagnant since 1959⁸. The main reasons for the stagnation are seen to be the inadequate land tenure system (big tracts of fertile land is held by absentee landlords), and lack of new agricultural techniques.

As mentioned earlier most of the farmers in the area are small-holder farmers growing mainly food crops and a mixture of cash crops. The range of crops they grow are not directed specifically to

the tourist industry. Since the industry is luxurious in nature, about the only local agricultural products consumed by the tourists come in the form of vegetables, fruits, poultry and other animal products. From the survey, a hotel like Lawford's (267 beds) utilize on average 1200 kg. of animal products (e.g. beef, pork), and 400 kg. of poultry products every month. Most of these products were supplied by a few commercial farmers in Malindi (e.g. M/s. Ratief, Rauf Ruf, ADC farm, Prisons farm, Meryhart, and Cowan)⁹. The only area in which the small-scale farmer has benefitted is in the supply of fresh vegetables to the hotels and town residents. The Sabaki Minor Irrigation Scheme (at the moment accommodating 55 farmers) grows vegetables mainly for the tourist industry in Malindi and the district as a whole.

In the formative years of the industry in Malindi, much of the food served to guests was brought up from Mombasa. However, as the number of tourists increased the proportion of local products consumed by the hotels increased. By 1968, Kisima farm (one of the well-established commercial farms in Malindi) supplied most of the beef, pork and dairy products to the town. It is recorded that tourism accounted for over 75% of the farm's income¹⁰. The situation has not changed a great deal since then.

From the hotel survey, one can conclude that there is not much stimulation of agricultural production from tourism. Very insignificant quantities of local agricultural products are consumed by the hotels and restaurants. A greater proportion of the products e.g. fruits are exported out of the district and even out of the country.

There has however been a proliferation of greengrocers selling fresh vegetables and fruits in Malindi. In 1968 they were only seven, compared to over 20 in 1984. This is probably due to the growth of cottages and residential tourism, since the occupants of the cottages and apartments who wish to do their own cooking have to get all their groceries and other provisions in the town stores and market. This is one way in which the local small-scale farmer can have access to the tourist market directly.

In conclusion tourism cannot be seen to have significantly stimulated agricultural production in the sub-district since the majority of the population (90%) are small-scale farmers growing food crops mainly for subsistence (see Appendix 4 on Crop Statistics).

Fishing

Fishing in Malindi became an important industry only after World War II. Before attempting to analyse the possible impact of tourism, it is important to note that fishing as an activity can be classified into two categories :

- (i) commercial fishing and
- (ii) sport fishing.

Over the past, the planning, management and development of Kenya's fisheries have been undertaken almost exclusively from the point of view of commercial fisheries : i.e.

- (1) as a source of food for Kenyans,
- (2) through exports, as a source of foreign exchange;
- (3) as a source of local employment and income.

However, what is more closely related to tourism is sport fishing, and the exploitation of other marine resources like shells, crustacea etc.

For commercial fishing, a variety of fishing are landed at Malindi, the dominant type being demersal, pelagic, and crustacea (lobster, prawns, crabs etc.). The following table shows marine fish landings in Kilifi District from 1967-82:

Table 4.5 : Marine Fish Landings, Kilifi District - 1967-82.

Year	M.Tons	'000 Shs.	Year	M. Tons	'000 Shs
1967	6	28	1974	150	482
1968	110	149	1975	250	778
1969	125	190	1976	428	1720
1970	134	242	1977	383	1272
1971	324	527	1978	754	2987
1972	176	373	1979	777	3637
1973	127	325	1980	667	3579
			1981	581	4956
			1982	1334	8301

Source: Fisheries Department, Nairobi.

Most of the fish landed in Kilifi District is handled by the Malindi Depot. The figures in the table are for marine fish only.

Only a very small proportion of the catch actually finds its way into the tourist hotels. Most of it is consumed by the residents and the rest about 50% exported out of the district. From the hotel survey it was found that the average tourist hotel requires about 1,000kg. of fish products per month. The major hotels and restaurants account for just under 10% of the catch. Within the category of commercial fishing the fishing of crustacea has had the greatest benefit from tourism. The

economic importance of crustaceans can be seen in the establishment of a prawn culture project at Ngomeni in Malindi with the help of the Food and Agriculture Organization.

Sport fishing in Malindi by tourists occurs up to 50 km. at sea, though most is done between the reef and 20km. from the shore. Game fish caught in this area are mainly sea perch, wahoo, Tuna, Bonito, Black marlin, Sharks, Barracuda, and Sailfish. Since 1934 the waters off Malindi have become world-famous for big-game fishing. As the popularity of Malindi as a tourist resort grew the number of tourists interested in sport fishing also increased. There was a tremendous expansion in the number of boats in deep-sea fishing from 3 in 1950 to about 20 in 1960. By 1968 the number of power driven fishing boats had increased slightly to 25! The cost of hiring a boat for 8 hours was then Shs. 480/-. This has now increased to Shs 1,500/- to charter a a boat from among the big fleet of big-game boats available at Malindi.

The importance of sport fishing is in its creation of employment and income. The international fishing festivals organized by the Malindi Sea Fishing Club attracts many visitors from all over the world. A two-way relationship exists between

tourism and sport fishing. It is however important to note that game-fishing is mainly undertaken by sport-fishing enthusiasts - residents and tourists alike. The average tourist in Malindi normally comes to Malindi for the sun and beaches and not specifically for sport-fishing. A real potential exists for the development of sport fisheries for the benefit of the tourist industry. There is however a need to determine the true potential for the development of a viable sport fishery in Kenya.

Commerce and Industry

This section will look at the impact of tourism on the commercial and industrial sectors of the town. These sectors cover wholesale and retail businesses, services, construction, manufactures etc. This is the sector that has benefitted most from the expansion of tourism, since it is so closely linked with tourism.

The analysis is based on a survey/inventory of retail and service businesses in Malindi in 1984 and compared with a similar survey done by E.B.Martin in 1968¹². The following information was sought from the survey: type of business, ownership, and number of workers. No attempt was made at obtaining turnover figures from the owners since

such figures would have been unreliable. The following table gives type of business (derived from licence category) and ownership by race as it was in 1984. (Table 4.6). The figures also indicate the total number of establishments.

Generally speaking the commercial sector has shown greater linkages with tourism. In an interview with the District Trade Officer at Malindi, he indicated that the commercial sector was to a great extent propped up by tourism. The degree of commercial activity during tourist peak season is much higher (about 400% higher) as seen from business turnover figures:

	Peak season	Low season
Small retail business	2,500/= per day	800/= per day
Large retail business	4,000/= per day	1,000/= per day

Source: District Trade Office, Malindi.

The two tables (4.6 and 4.1) generally show that there has been great expansion in the retail and service businesses in Malindi since 1968. This includes even those that are not regulated by the Trade Department e.g. curio sellers who number about 100.

Table 4.6: Ownership of Businesses in Malindi, 1984 and 1968

Licence Category	B1	B2	B3	B4	B5	B6	Total	
Type of Licence or nature of Business	Wholesale or Distributors	Caterers	Motor Vehicle Repairs (Garage)	Retail (Regulated)	Misc. Occupation	Manufacturers	1984	1968
Africans	9	38 (2)*	8 (1)	895 (20)	36	1	987	37
Arabs	30	3 (12)	4 (5)	179 (64)	4	3	223	100
Asians	24	7 (7)	5 (3)	177 (43)	14	11	238	70
Europeans	2	34 (7)	4 (1)	59 (9)	37	7	143	37
Total	65	82 (28)	21 (10)	1310 (140)	91	22	1591	244

Source: Trade Office, Malindi and * E.B. Martin's History of Malindi.

Notes:

* () - The figures in brackets refers to the situation in 1968.

Although table 4.6 indicates that the number of African businessmen has gone up, most of them are engaged in retail establishments that sell general merchandise. There is only one substantial business owned by an African - a wholesale store. The other locally owned business is the Sindbad Hotel owned by Kilifi District Co-operative Union. Most of the wholesale and service businesses linked with tourism e.g. groceries, boutiques, estate agencies, construction companies are operated by Europeans and Asians. This state of affairs is largely attributed to the lack of sophistication of the indigenous people.

The tourists survey also showed that the majority of tourists spend more money (on average ; 300/=) on expenditure outside boarding and lodging (161/= - 250/=) per day; thus stimulating the commercial sector. The high commercial activity during peak season can be attributed to the growing popularity of self catering accommodation (cottages, villas, and apartments) which greatly stimulates retail businesses in the town since occupants of the cottages have to get all their groceries and other provisions from the town stores. It was not possible to get the number of houses operating as cottages since it is illegal to operate such a business.

MALINDI: INFRASTRUCTURAL CHANGES

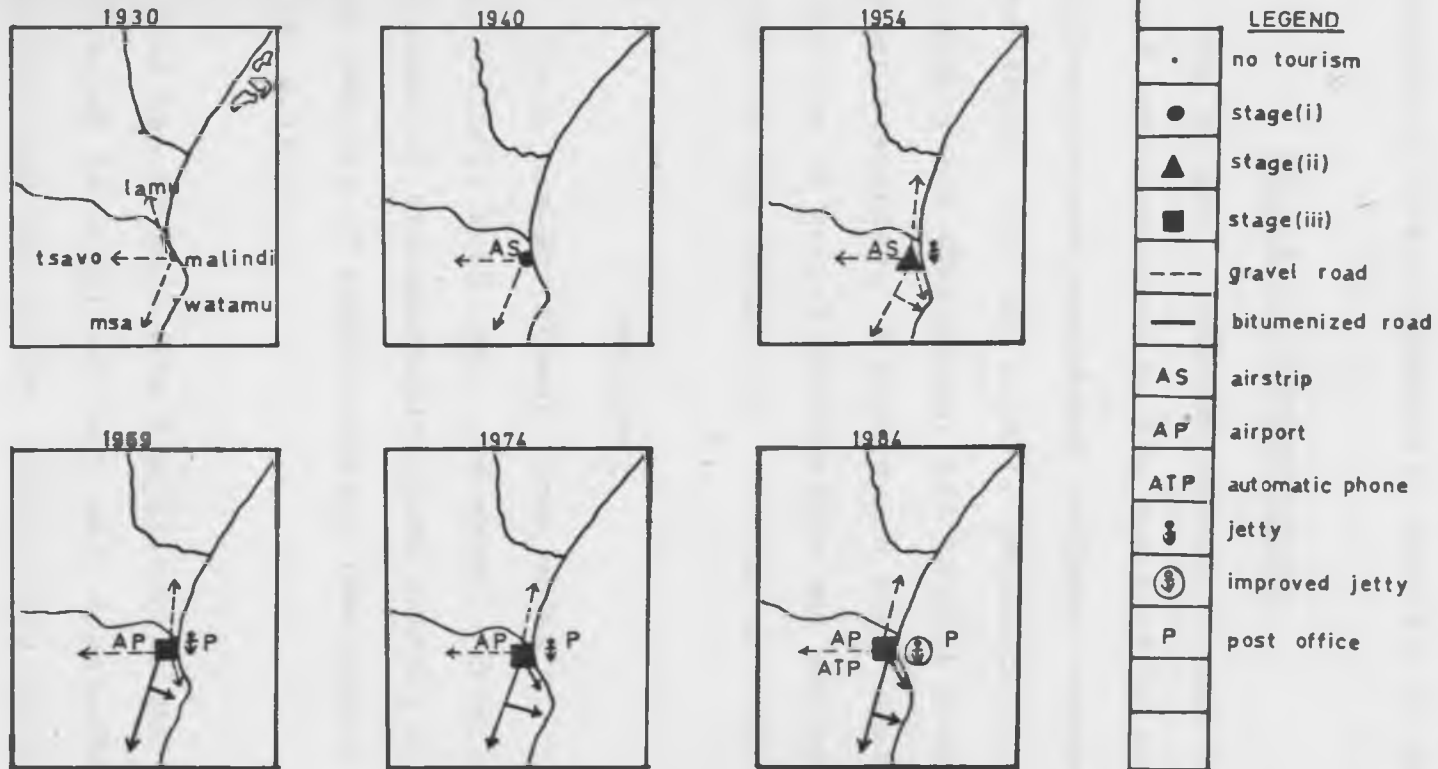


FIG. 4-1

source: migot-adholla

However interviews with hoteliers indicated that there were about 100 cottages in Malindi; contributing substantially to the commercial activity in Malindi.

Impact on Infrastructure

The growth of tourism creates a need for an improved infrastructure in the destination area. The infrastructure considered includes transport systems (road, air, and water), communications, water supply and sanitation, and tourist facilities and other amenities. A before and after analysis with the use of aerial photographs was employed to bring out the impact of tourism on infrastructure.

Transport

There are at present three modes of transportation in the Malindi: road, air, and water. From 1954 all these modes of transportation have existed at varying degrees of sophistication (see plates 1-4; and Fig. 4.1).

As can be seen from the illustrations the road network is still not very well developed both within the town and in the surrounding areas. The bitumenization of the Mombasa-Malindi road (B8) in the late 1960s has made Malindi much more accessible by road. Further improvements like the New Nyali

bridge and the proposed bridge at the Kilifi Ferry crossing is all in response to the expansion of tourism in the North Coast, and especially Malindi. Plates 3 and 4 show the expansion and improvement of the road network within Malindi especially in the Silversands area connecting with Watamu along the Coast.

Air services in Malindi have greatly improved with the expansion of the Malindi Airport over the years. The airport at Malindi can now accommodate DC9 aircraft. This airport is used mainly by chartered planes used in the tourist industry, and its upgrading over the years has been as a direct result of tourism development. However, the airport is also used to airlift agricultural products such as fruits and sea food to Nairobi and overseas. There are plans to further expand the airport to accommodate bigger jet aircraft straight from Europe.

Table 4.7: Aircraft Landing at Malindi Airport - 1981 and 1982.

Type of Aircraft	1981	1982
Chartered planes	6049	5464
Scheduled planes	1515	1388
Cargo	7036.3kg.	20592.1kg.
Passenger	25667	26592

Source: Kilifi District Environmental Assessment Report, 1984.

Sea transport is not very significant and is not used by tourists to come to Malindi. The Malindi jetty (constructed in 1954 : see plates 1-4) has over the years been used by local fishermen in their boats. The expansion of the jetty (completed in 1984), see plate 4) is intended to boost sea transport and provide better fish landing facilities.

Communications

Communication facilities in Malindi have been improved tremendously due to the growth of the tourist industry. These facilities include postal services, telephone and telex services. The telephone services have recently been improved making it possible for subscribers to ring overseas directly. The present post office is however not adequate, especially during the tourist peak season.

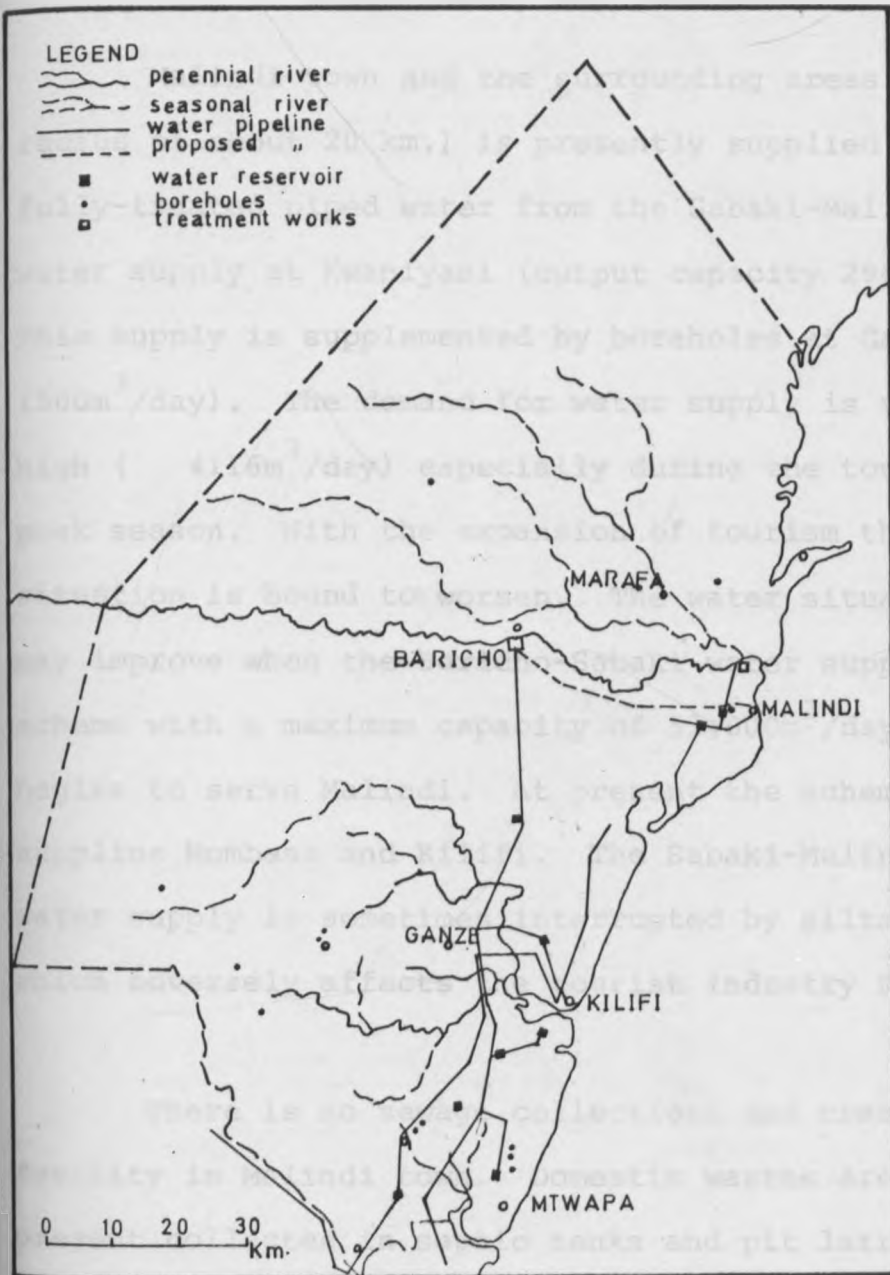


FIG 40 WATER RESOURCES. KILIFI DISTRICT
SOURCE: KILIFI DEAR, 1984

Water Supply and Sanitation

Malindi town and the surrounding areas (a radius of about 20 km.) is presently supplied with fully-treated piped water from the Sabaki-Malindi water supply at Kwaniyani (output capacity $2900\text{m}^3/\text{day}$). This supply is supplemented by boreholes at Ganda ($500\text{m}^3/\text{day}$). The demand for water supply is very high ($4116\text{m}^3/\text{day}$) especially during the tourist peak season. With the expansion of tourism the situation is bound to worsen. The water situation may improve when the Baricho-Sabaki water supply scheme with a maximum capacity of $53,000\text{m}^3/\text{day}$ begins to serve Malindi. At present the scheme supplies Mombasa and Kilifi. The Sabaki-Malindi water supply is sometimes interrupted by siltation which adversely affects the tourist industry Fig. 4.0.

There is no sewage collection and treatment facility in Malindi town. Domestic wastes are at present collected in septic tanks and pit latrines, depending on the part of town. Most of the households in Old Town use pit latrines while the tourist zones (Northern and Southern parts of the town) use septic tanks. The problems of the inadequacy of the waste disposal system were realized right from the formative years of the tourist industry in Malindi. The major problem is that of infecting underground water. The problem has been further aggravated by the rapid

expansion of tourism. Plans are underway to provide a sewage treatment plant for Malindi.

Solid waste collection and disposal is done by the Malindi Municipal Council to varying degrees. Some parts of the Old Town, for example, hardly offer any opportunities for refuse collection, while the better planned northern and southern parts are better serviced.

Tourist Facilities to page 103

The number of tourist facilities and amenities (e.g. hotels, restaurants and bars, nightclubs, casinos, cinemas, sports facilities) have naturally increased with the expansion of tourism, as shown by -table below:

Table 4.8: Tourist Facilities and Services: 1968

	1968	1984
Hotels	15	22
Cafes, Restaurants and Bars	2	16
Nightclubs	1	4
Casinos	-	1
Cinemas	1	3
Marine park	-	1
Banks	3	5

The expansion, however, has been greatest for accommodation and catering facilities (reflecting the growth of tourism), without a corresponding increase in sports and recreation facilities for both tourists and residents.

It is important that in order for these infrastructural changes to be perceived as benefits, they should not be seen as changes per se, but rather in the economic sense: that when the government or private sector provides these services to the tourists they are at the same time available to local residents (hence the need for co-ordinated planning of facilities). Improved roads benefit farmers in outlying areas, whilst airstrips constructed primarily to aid tourism may open up the economies of remote regions¹³.

Impact on Land-use and Physical Development of the Town.

This section deals with the impact of tourism on land-use and physical development of the town. Aerial photographs are again used to depict the changes over the years. Before discussing the impacts, it is necessary to have a background of the historical influences on land ownership and tenure in Malindi. The land within Malindi town,

is by and large held under freehold title. These titles derive from the days when the sultan of Zanzibar ruled over the ten mile coastal strip stretching from Tanzania to Somalia. When the British Protectorate was established over these lands, the rights of former subjects of the Sultan were to be safeguarded. From around 1911 a process of recording claims to land and adjudication began with most of the land going to Arabs.

At Independence, these rights to land were again protected in the constitution resulting in freehold titles. The only land in public ownership resulted from unclaimed areas, disallowed claims, and land acquired by the Government for specific purposes e.g. airport, schools etc. Areas outside the coastal strip are now Government or Trust land. This situation (of almost all land being in private hands) has made public sector control of the actual growth of the town very difficult.

When the municipality is taken in its whole entirety, the activity that has the highest demand on land is agriculture with intensive market gardening in Sabaki area. In the town itself residential comes first, followed by commercial-cum-residential, and industrial. (see plate 3-4). As with most coastal towns, the fabric of the town reflects the various influences of both historic

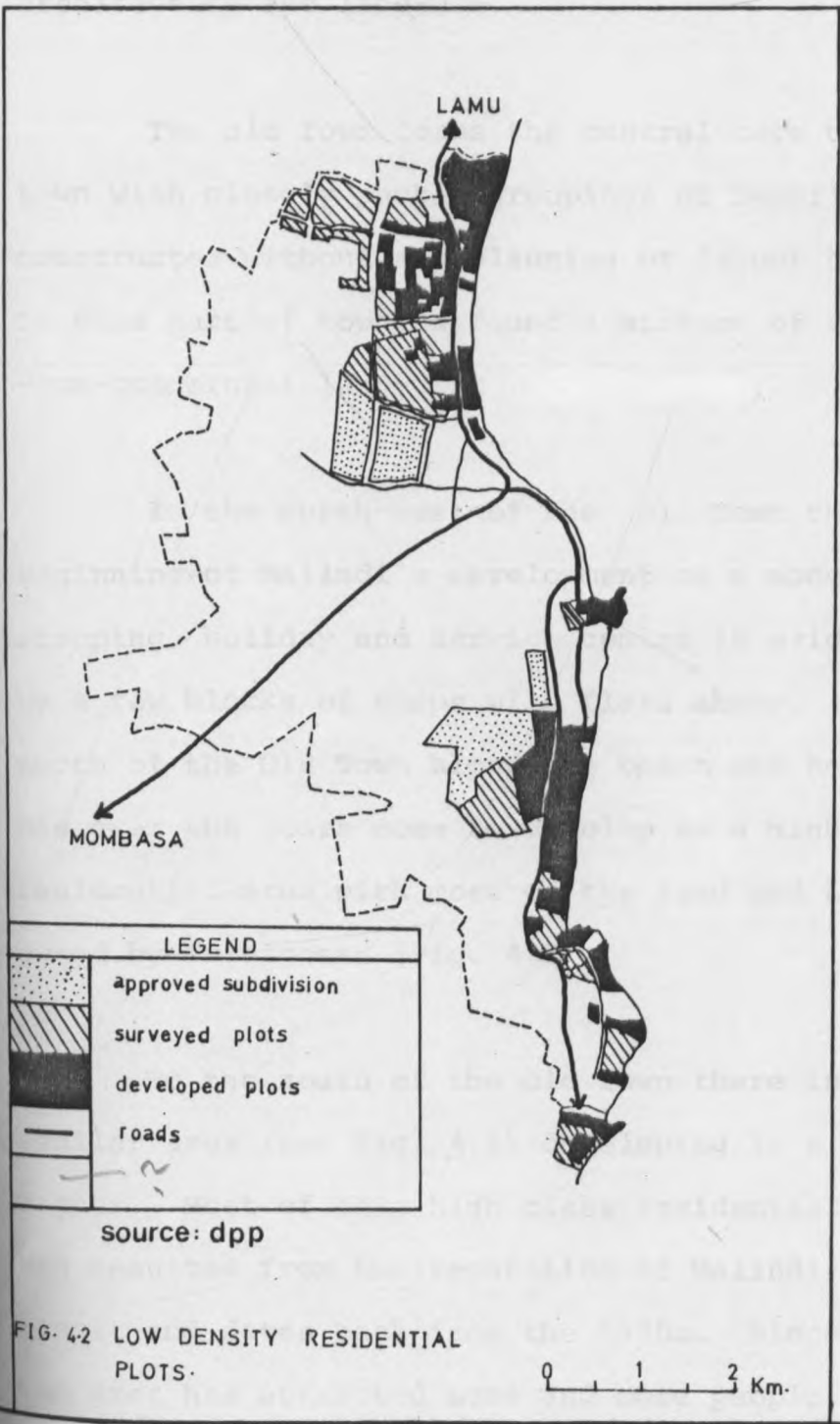



FIG. 42 LOW DENSITY RESIDENTIAL PLOTS.

and contemporary ways of life in its delivery of architecture and land-use.

The old Town forms the central core of the town with closely packed groupings of Swahili houses constructed without any planning or layout control. In this part of town is found a mixture of residential -cum-commercial land-uses .

To the north-west of the Old Town the beginning of Malindi's development as a modern shopping, holiday and service centre is evidenced by a few blocks of shops with flats above. To the north of the Old Town along the beach and behind it has over the years come to develop as a high class residential area with most of the land and houses owned by foreigners (Fig. 4.2).

To the south of the Old Town there is a similar area (see Fig. 4.2) developing in a similar manner. Most of this high class residential development has resulted from the reputation of Malindi as a holiday resort and dates back from the 1930s. Since Independence, the area has attracted more and more people with an interest in buying land and building houses and cottages for retiring in and also for renting. Quite a number of foreign nationals have bought land and built houses for such purposes.

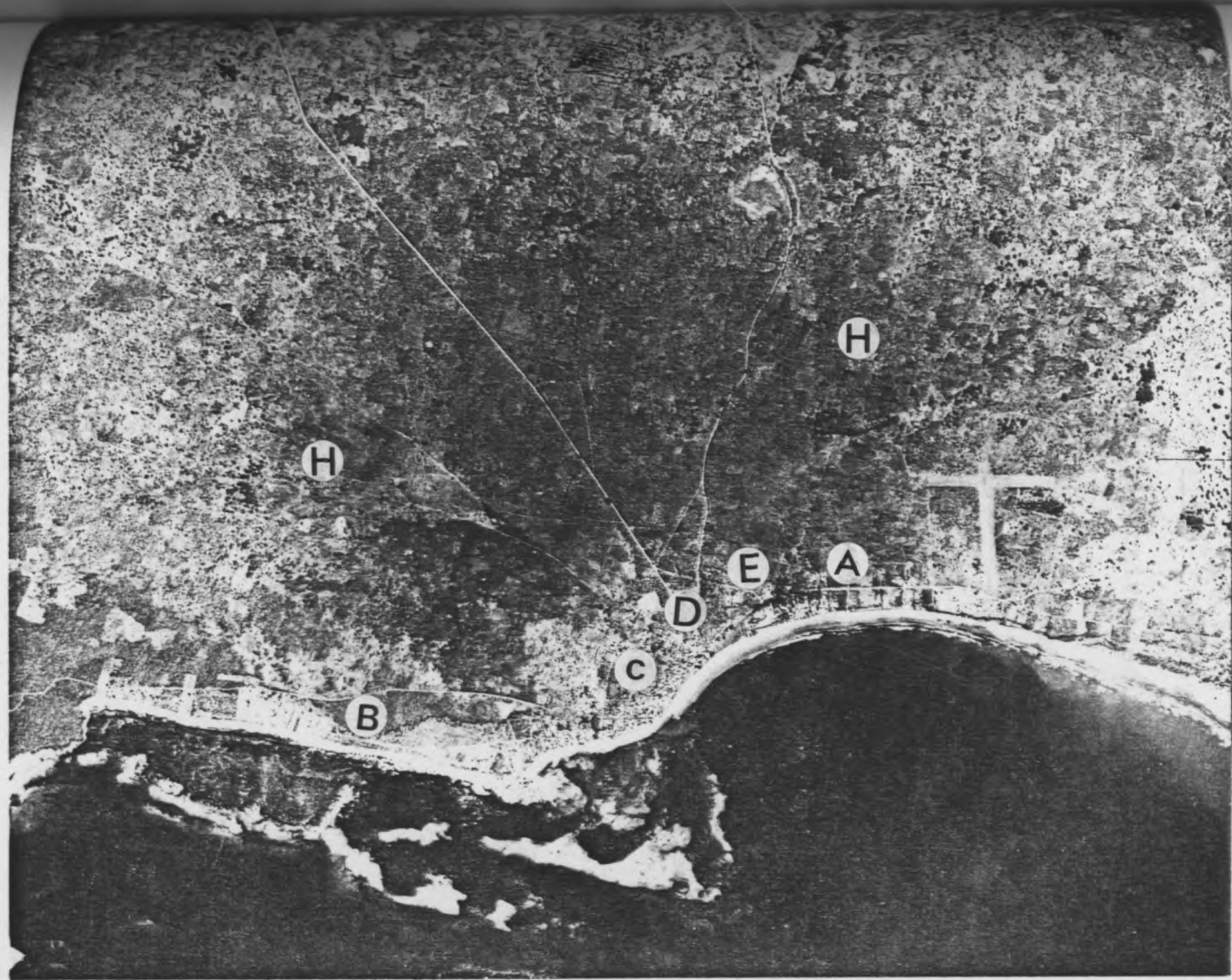


Plate 1 : Malindi Town, 1954.

Legend : Plate 1

- A - Malindi North : mainly hotel development.
- B - Malindi South : hardly any development
- C - Old Town (Shella) : mainly residential-cum-commercial activities.
- D - Central Business District (CBD) : retail activities.
- E - Malindi West (Majengo and Barani) : hardly any development.
- H - Agricultural land.



Plate 2 : Malindi Town, 1969

Legend : Plate 2

- A - Malindi North : mainly hotel development and low residential development where there used to be an airstrip (see plate 1). Notice more access roads.
- B - Malindi South : mainly low residential development. Notice more access roads.
- C - Old Town (Shella) : mainly residential-cum-commercial activities. Notice that the fabric of this core unit has not changed much from 1954 (Plate 1).
- D - Central Business District (CBD) : mainly retail activities and small hotels. This part of town has not changed a great deal either from 1954.
- E - Malindi West (Majengo and Barani) : mainly high density residential development. A major growth from plate 1 where it was non-existent.
- H - Agricultural activities : more land has been taken up by residential development.

Notice the general improvement in the road network; with more access roads in Malindi North and South; the tarmacking of Malindi-Mombasa road, and the new airfield.



Plate 3 : Malindi Town, 1974.

Legend : Plate 3

- A - Malindi North : mainly hotel development, low density residential development, and holiday and modern shopping centre. Notice additional development compared to Plate 2.
- B - Malindi South: mainly low residential development, but not as extensive as shown in plate 4.
- C - Old Town (Shella) : mainly residential-cum-commercial without planned lay-out.
- D - Central Business District (CBD) : mainly retail activities and small hotels.
- E - Malindi West (Majengo and Barani): high density residential development. Notice additional development.
- F - Malindi West (Kisumu Ndogo): beginnings of unplanned settlements. Notice its absence in Plate 2.
- H - Agricultural activities : Notice accretion of residential development on what used to be agricultural land in Plate 2).

Notice also improvement of the road network, especially leading to Malindi South.



Plate 4 : Malindi Town, 1984.

Legend : Plate 4

- A - Malindi North : mainly hotel development, low density residential development, and holiday and shopping centre (high class).
- B - Malindi South : mainly developed with cottages, and other low density residential development. Limited hotel development and ocean sports. Note camping site B1.
- C - Old Town (Shella): mainly residential-cum-commercial without planned lay-out. Notice additional development towards the south.
- D - CBD : Central Business District : mainly retail activities and small hotels. Increasing accretion from the north by tourism services, e.g. boutiques, tour agencies, gift shops, etc.
- E - Malindi West (Majengo and Barani): high density residential development.
- F - Malindi West (Kisumu Ndogo) : high density residential development characteristic of slum dwellings.
- G - industrial activities.
- H - Agricultural activities : Notice growth of unplanned settlements H 1.
- J - improved jetty.

Plates 1-4 show that tourism has had a major role in the resultant pattern of land-use. Over the years, low-density residential development, tourism service industries etc. have had the greatest demand on land. Even the proliferation of high-density residential zones (Malindi West and Majengo) can be attributed to the in-migration of people into Malindi looking for employment in the tourist industry.

The physical development of the town is also largely due to tourism. As seen from Plates 1-4 the core of the town (Old Town) has not undergone any significant changes over the years. This part of the town has tended to degenerate with the decline in the Dhow Trade and Fishing which were among Malindi's economic mainstays. The other parts of the town came as a result of tourism, and have tended to grow with tourism. Malindi, today, is a perfect example of extensive ribbon development.

The status of the town has also been closely following the growth of tourism : 1963 (Urban Council), 1974 (Town Council), and 1981 (Municipal Council).

Social-cultural Impact

The impact of tourism on the social and cultural values of the indigenous populations -of host countries has been tackled by many researchers. However, such claimed social costs as the "demonstration effect", cultural alienation, deterioration of social systems have never really been well substantiated. In fact in most cases the results of such studies cannot be generalized because, one, not all cultures are susceptible to these effects to the same degree, and two, it is normally difficult to establish firm criteria or means of evaluating "social costs". Establishment of such criteria becomes almost impossible considering the numerous subjective judgements of the attitudes and values of the society that have to be made in the assesement of the effects. A lack of baseline studies is also another constraint.

With such constraints, the next best solution is normally to make qualitative investigations of the perceived impact of tourism among residents (e.g. Migot-Adholla (1982)). Such investigations of opinions aim at verifying or falsifying the original assumption. As indicated in the objectives of the study, this section of the study does not delve deep into the subject of socio-cultural impact as it requires specialist investigation.

A questionnaire was administered at random to the residents of Malindi to survey their opinions on the advantages and disadvantages of tourism development in general. This questionnaire was supplemented by in-depth interviews with prominent residents of the area such as elected leaders, government officials, and businessmen.

In general the survey showed that most of the residents were aware of the side-effects of tourism e.g. prostitution, drug trafficking, beach boys, foreign currency fiddles etc; but at the same time attached more value to the economic benefits accruing from tourism development e.g. employment, income generation through tourism related activities. The extent to which the residents value the economic benefits is further verified by the fact that many residents of the town viewed the recent "Malindi Mafia Saga" (exposed by a daily newspaper) as "economic sabotage" ¹⁴. The Deputy mayor commenting on the reports about criminal activities in Malindi seemed to sum up -the sentiments of residents :'

"We all feel that if there are any criminal elements around us they should be routed out: but the less said about - it the better for all concerned" ¹⁵.

At the individual level, the most critical of the local people still advocate for tourism development but "in the right way so as not to hurt the local residents,"¹⁶ without specifying exactly how this would be carried out.

Summary

Employment

The tourism sector has developed into the biggest wage employer in Malindi. However, growth in direct employment (hotels, tour operators, restaurants) has been slowing down, while growth in employment in the ancillary industries is generally on the up. This is probably due to:

- (i) development of ancillary services feeding into the tourism sector
- (ii) slow-down in hotel expansion as a result of declining hotel occupancy rates, and
- (iii) growing popularity of residential tourism.

Linkages

Tourism cannot be said to have significantly stimulated the agricultural and fishing sectors in Malindi. Generally, the hotels have, over the years, come to use a greater proportion of local agricultural and fish products, but these products are supplied

by a few big commercial farmers. The majority of the people in the area (about 90%) are basically subsistence farmers.

The commercial sector (composed of wholesale, and retail traders, and other services) has probably benefitted most from the expansion of tourism. Degree of commercial activity during peak season goes up by as much as 400%.

Infrastructure

Tourism development has tended to improve the infrastructure in the area (Transport, communications, water supply and sanitation). However, these improvements have tended to be concentrated in the tourist zones with hardly any extension to the hinterland.

Land-use and physical Development

The land-use pattern and the resulting physical structure of the town is largely due to the growth of tourism. Rapid tourism development has led to extensive ribbon development.

Socio-cultural

The majority of the residents are aware of the adverse effects of tourism, but still favour tourism development mainly due to the economic benefits.

Notes

1. See "Historical Growth of Tourism in Malindi" in the preceding chapter.
2. National Environmental secretariat, Kilifi District Environmental Assessment Report (Nairobi :Dec.1984).
3. E.B. Martin (b), The History of Malindi (Nairobi: EALB, 1973), p. 258.
4. The closure of the hotel sparked off the "Malindi Mafia Saga" that featured in the local dailies for a long time at the end of 1984.
5. S.E. Migot-Adholla, "Study of Tourism in Kenya" p.64.
6. Central Bureau of Statistics, Wage Employment Census in the Modern Sector: 1968, 1969, 1970, 1971, 1972, 1973, 1974, 1975, 1976, 1977, 1978.
7. Ministry of Agriculture Annual Reports, Malindi Sub-District.
8. E.B. Martin (b), p. 115
9. Malindi Sub District Agricultural Annual Report, 1983.
10. E.B. Martin p.64.
11. E.B. Martin p.258
12. Op.Cit; p. 143
13. P.G. Sadler and B.H. Archer, "The Economic Impact of Tourism in Developing Countries" in Tourism in Africa and the Management of Related Resources (University of Edinburgh : 1974) p.18.
14. See "Weekly Review", Nov. 23 1984, p.11, and "Kenya Times", Oct. 31, 1984, Nov. 2, 1984.
15. Weekly Review, Nov. 23, 1984, p.11.
16. From author's survey.

CHAPTER FIVE

FINDINGS AND RECOMMENDATIONS

The study sought to assess the impact of tourism on some economic and social aspects of Malindi. An additional objective of the study was to come up with policy recommendations at both national and local level that would make tourism development more beneficial to the local community, and at the same time promote a favourable climate for the industry. Each aspect is treated separately for the purpose of presentation, although some are so closely inter-related that some of the recommendations overlap.

Employment

Wage employment generated by the tourism industry is perhaps the most obvious economic benefit to the people of Malindi. In 1984 the industry employed about 1,500 people (approximately 40% of total wage employment in Malindi)¹. The percentage could even be higher when one takes into consideration its spread effects. Compared to the other sectors of the economy, tourism has clearly generated more employment (see Tables 4.3 and 4.4). The study also revealed a slowdown in the growth of direct employment, and an upturn in indirect employment. Another important feature of the industry in Malindi is the fact that most of the establishments are owned by foreigners

(with the exception of Sindbad Hotel which is owned by the Kilifi District Co-operative Union), and are invariably the very high standard establishments employing the locals in very low-status positions. In this way there is very little likelihood of the local people benefitting more from tourism. To maximise benefits to the local people in terms of employment (defined broadly to include self-employment) and income generation it is suggested that:

- (i) The industry should be organized and developed in such a way that greater participation of the local people in ownership of the tourist establishments is enhanced. This could be made possible by encouraging the development of smaller, locally owned establishments to break the dominance by the standard type of accommodation offered in Malindi. This implies a conscious effort to develop the right kind of tourism, and therefore requires policy intervention at the highest level. The irony is that while the "bed and breakfast" catering system is very popular in Western Europe (where most of the tourists come from), the development of cottages which could easily run along the same lines, is being stifled here. This self-catering type of tourism has a number of advantages, the most obvious being:

- (a) a greater stimulation of the economy, since a wider range of ancillary services have to be seperately purchased from the local stores and groceries, thus generating employment and income.

- (b) a greater spread of the economic benefits could be achieved.

However, before the implementation of such policy it would be more prudent to have a more complete and comprehensive market study that would determine the size of the market for such facilities, pricing and control of their development through licensing ².

- (ii) The local people should be encouraged to develop ancillary industries that feed directly into the tourist industry since it is these industries (furniture making, construction, transport etc.) that create employment and in the long run actually reflect the benefits of tourism to the local people. This will require availability of credit facilities. This is one area in which the Rural Industrial Development Centre could play a major role.

Linkage Effects

The indirect effects of tourism on the local economy normally turn out to be the most beneficial to the local people. As most researchers have pointed out, (Elkan (1973), Lawson, Bryden), the economic benefits of tourism depend upon the linkage or indirect effects created by tourism. Even employment generated depends upon the linkage effects. Only by developing service industries (e.g. food, handicrafts, textiles, furniture-making, transportation etc) can the local people then benefit more from the tourists.

The study has shown that the only significant stimulation tourism has had on the Malindi economy is in the commercial sector. The other sectors considered such as agriculture and fishing have not benefited as much from tourism as would have been expected. The quantity of local food products consumed by the big tourist hotels is almost insignificant and these are invariably supplied by a minority of well-established farmers, and in some cases the hotels grow their own vegetables etc. (e.g. Tropicana Hotels). This is probably due to the high quality of products demanded by these standard type hotels; and the lack of marketing outlets for the small farmer.

As was shown in the preceding chapter the stimulation of the commercial sector is due to the fact that tourists (both from the big hotels and the

smaller establishments, but increasingly more from the smaller establishments) spend quite a lot on local purchases.

In view of the above, it is suggested that:

- (i) the small farmers engaged in market gardening (e.g. in the Sabaki area) should be encouraged to form co-operatives to market their produce directly to the hotel industry;
- (ii) the local people should be encouraged to develop ancillary industries that feed directly into the tourist industry;
- (iii) at the higher level of policy intervention, the tourist industry should be developed in such a way that it stimulates the local economy. The recent government clampdown on cottages can be seen as a result of lobbying from the big hoteliers who saw the mushrooming of the cottages as a threat to their businesses. However proper development of the concept of self-catering accommodation can result in more benefits for the country than from the standard hotels.
- (iv) There is a need to determine the true potential for the development of a viable sport fishery in Kenya for the benefit of the tourist industry.

This is one area in fisheries development that has received very little attention from policy makers. Over the past years, the planning, management and development of Kenya's fisheries has been undertaken almost exclusively from the point of view of commercial fisheries, i.e.

- (a) as a source of food for Kenyans
- (b) as a source of foreign exchange through exports, and
- (c) as as source of local employment and income.

With the growing importance of Sport Fishery in the tourist industry there is a need for its economic feasibility to be assessed.

Infrastructure

The level of infrastructural development could be analysed in two ways:

- (i) as offering opportunities or constraints to further tourism development, and
- (ii) in its role as stimulant to general development.

The study looked at the infrastructural development in Malindi with a view to assessing its role in development. However, a study on hotel-bed capacity along the Coast in 1979 by KTDC recommended, on the basis of level of infrastructure and cost of developing

further infrastructure, that the Malindi area was unsuitable for further tourism development³. This conclusion was arrived at largely due to the chronic water shortage in the area, -which had been caused by the rapid expansion of tourism in the early 1970s.

The study has shown that tourism has been instrumental in the improvement of infrastructure in the area especially with reference to roads, air transport, water supply, and telecommunications. However, most of this infrastructure is concentrated along the coastal zone where most tourists are; the hinterland is virtually left out; thus contributing little -to the development of the region. The transport network, for example, is sufficiently improved to make Malindi accessible to tourists. For tourism to trully benefit the local community, it is recommended that infrastructures such as roads, water supply, electricity and telephones should be extended to serve also the hinterland. Planning of such infrastructure should have the interests of local people in mind. This can only be achieved if tourism is regarded, at the national level, as a resource endowed to a particular region - just as much as coffee or tea grows in particular parts of the country and not others, so that some of the benefits of tourism accruing to the nation could be put into developing the region's infrastructure.

The provision of adequate infrastructure to the tourist industry has often been done at a cost subsidised by the public exchequer. This burden on the public could be lessened if some kind of improved site value (ISV) rate was charged on land developed specifically for tourism by the local authority. In this way the industry would be paying for the high standard of infrastructure that it demands. At present, the Malindi Municipal Council, like all other local authorities in Kenya, is only allowed to charge the unimproved site value (USV) rate on land irrespective of the type of development on the land.

Land-use and Physical Development

The development of tourism in Malindi has had a big impact on land-use within the town and consequently the physical development of the town. As mentioned in the preceding chapter most of the land in Malindi is freehold and so there is very little opportunity for public sector control on development. Tourism has had the effect of heightening the demand for land for residential purposes especially along the sea front and immediately behind (Fig. 4.2). This trend began in the 1940s when tourism picked up, with many settlers from the Highlands buying land in Malindi in order to build houses with a view of retiring there.

With the rapid development of tourism the best building plots along the sea front were bought, increasingly by foreigners, for building of houses and cottages and sometimes just for speculation. Most of the land suitable for hotel development is now low residential plots, making investment in hotel development quite expensive.

Malindi has over the years become a perfect example of ribbon development with hotels, cottages, villas etc. in close proximity to each other on the beach frontage due to the rapid and haphazard growth of tourism. This has the effect of making infrastructure development very expensive; and some land may not be used optimally.

At present Malindi Municipal Council is the Authority that controls development within Malindi under the Town Planning Act (Cap. 133), the Kenya Adoptive Building Bye-laws and the land Planning Act (Cap. 303). A physical development plan of tourist facilities and locations of primary interest elaborating which land is best suited for tourism development should form part of the overall physical development plan of the town. This will require the acquisition of such land that will later be sold off to developers who will develop the land in accordance with the plan. This is about the only way that the rate and scale of tourism development can be regulated within the present laws

on land development. Any physical development plan of the town should recognize the two factors that distinguish Malindi from other towns of similar size, i.e.

- (i) the fact that it is a fast-growing tourist resort;
- (ii) its unique land ownership history.

Social Considerations

In this section one is faced with the problem of conflicting objectives. Ideally, policy should aim at enhancing the welfare of the local people, and also create a favourable climate for the development of the industry. However, economic objectives more often than not tend to clash with social objectives. For example, greater participation of the local community in the industry, inevitably means much more association with the tourists and their way of life, which could in turn lead to cultural alienation etc. Further expansion of tourism, although economically desirable, may bring with it undesirable social costs.

The solution, as recommended in many other similar studies, is a fairly well-integrated overall development strategy for the area that takes into consideration the dynamics of the industry. The crucial point is that the rate and scale of tourism development should be controlled so that it is in harmony with the development plan of the region. This means an interaction of policies on issues that are pertinent to development e.g. land policies, resource utilization, finance, public participation, etc.

Notes

1. Taking total wage employment in Malindi to be about 4,000 c.f. Table 4.4.
2. KTDC Report, 1979.
3. KTDC Report, 1979.

CHAPTER SIX

SUMMARY AND CONCLUSIONS

It is generally recognized that wherever tourism plays a key role in the economy, it brings with it many pecuniary and non-pecuniary benefits and costs. Among the economic and social advantages and disadvantages brought by tourism the most significant appear to be:

- (i) the effect on foreign exchange earnings
- (ii) income effects
- (iii) employment effects
- (iv) environmental and ecological effects
- (vi) social and psychological effects.

Many studies have been done worldwide in a bid to understand the nature and extent of the role of tourism in development. The role that tourism plays in a developing economy tends to vary from country to country.

The objective of this study was to assess the impact of tourism on some of the above aspects in Malindi:

- a) impact on employment
- b) linkage effects with other economic sectors
- c) impact on infrastructure

- d) - impact on land-use and physical development of Malindi.
- e) socio-cultural impacts.

By assessing the impact of tourism on the above aspects, the study was an attempt at understanding the role of tourism in the development of Malindi and its environs. An additional objective was to come up with recommendations on how to make tourism more beneficial to the local community.

In general, the study tends to confirm most popular views on the effects of tourism on host populations as brought out in the preceding chapter. In this way the study serves to reinforce these views. In addition, the study comes up with policy recommendations on the organization and development of the industry, based on the impact assessment, that in some cases differ from popularly held opinions. In such a case the study can be seen as a contribution to the understanding of the implications of the industry in Kenya.

The study has confirmed that tourism has become the biggest source of employment in Malindi, although a re-organization of the industry could offer opportunities for the creation of more employment.

The study also revealed that tourism has favourably affected some other sectors of the economy. This is especially so with the commercial sector, which has realized great expansion over the years. Agriculture and Fishing which used to be the most important economic activities in Malindi before the emergence of tourism, have not had as much stimulation from tourism as would have been expected. In this respect, the study recommends a re-organization of the industry to facilitate greater spread effects.

On infrastructure the study reveals that although tourism development has had the effect of improving infrastructural standards, these have tended to be concentrated in the tourist zones. The study recommends extension of infrastructure that has been availed to the tourist industry to the local community in order to stimulate development.

The study has also revealed that the land-use pattern and the resultant physical development of the town are all due to tourism development. The extensive ribbon development has largely been caused by tourism. However, there is very little the Municipal Council of Malindi can do in terms of development control, as most of the land in Malindi is held under freehold title. Uncontrolled development has the effect of making provision for amenities and services very difficult,

among other things.

The study has also shown that the majority of the people favour tourism development; because of the economic benefits. This is despite the fact that they are also aware of the ills that can be brought by tourism. It would thus appear that a strategy to develop tourism in a way that minimises its side effects is the most appropriate.

In general what the study brings out is that the organization of the industry has a great bearing on the extent to which the benefits of tourism can be well-distributed to the local community. While the present study has made some contribution to the understanding of the implications of developing the industry on the social and economic lives of the host community, the study was far from being exhaustive.

As indicated earlier, the scope of this study was limited to a few aspects of the subject of tourism and development. To assess fully the impact of tourism on the economic and social lives of the residents, further studies would be necessary in such areas as:

(i) the effect of tourism on domestic price levels.

This is because tourism could have the effect of raising the cost of living in most tourist resorts.

- (ii) the effect of tourism on employment becomes more meaningful when it is seen in terms of incomes generated rather than employment figures alone.

- (iii) due to the dynamic nature of the industry, it is necessary that there is a continuous collection and analysis of data; not only on such statistics as tourist arrivals, foreign exchange receipts, but also on, say, tourist spending, by region and local area. This would be of value in the planning of regional tourism development.

APPENDIX 1

HOTEL/LODGE QUESTIONNAIRE

1. Name of Hotel/Lodge
2. Proprietors of Hotel/Lodge
3. Managers of Hotel/Lodge (if different from proprietor).....
4. Total number of staff.... Local residents.....
Migrants
- Non-citizens.....
5. In what capacity are they employed?

	<u>Management</u>	<u>Waiters/Stewards</u>	<u>Others</u>
Local residents
Migrants
Non-citizens
6. Total no. of rooms beds
7. Charges per room/bed:

	<u>Peak season</u>	<u>Off-season</u>
double
single
bed
9. Use of beach by local population:

Restricted
Allowed
10. Any problems of beach pollution?
11. Regularity ...-.....
Measures taken.....
11. No. of boats which service the hotel
- owned
- hired

12. What is the approximate utilisation of local products/services in the hotel?

	<u>Approx. cost (per month)</u>
Farm produce-.....-.....
Animal products (beef etc.
Poultry
Furnishings
Entertainment (local dances, etc)
Fish products

13. What is the condition of:

	<u>Very good</u>	<u>Good</u>	<u>Fair</u>	<u>Poor</u>
Water supply
Sewage
refuse-disposal

APPENDIX 2

MUNICIPAL AND GOVERNMENT PLANNING OFFICERS QUESTIONNAIRE

1. What is the present status of Malindi town?.....
.....
2. How has the status of this town been changing over the past years?
.....
.....
3. Why did you find it necessary to plan the town after these changes (as stated in 2)?
.....
.....
4. What problems, if any, have you come to realise in accordance to this type of development?
.....
.....
5. What activities have had the highest demand on land in Malindi town?
.....
.....
6. What major benefits or advantages if any, has tourism development contributed to the council as well as to the growth of Malindi?
.....
.....
7. What major problems, if any, have you experienced with the development of tourism?
.....i.....
.....

8. What land ownership -and plot allocation problems related to tourism?

.....
.....

9. What plans if any, do you have concerning the future growth of the Town?

.....
.....

APPENDIX 3

TOUR OPERATORS QUESTIONNAIRE

1. Name of Tour Company
2. Ownership - Foreign Local
3. Total No. of staffLocal residents
..... MigrantsNon citizens.....
4. Operational costs for vehicles:
Fuel Maintenance
5. Where maintained
6. How do you get your customers?
 - (a) package tours arranged outside the country
 - (b) locally arranged tour packages
 - (c) other (specify)
 -
7. What is your opinion on the following:
 - (a) Information services:
.....
.....
.....
 - (b) Telecommunications services:
.....
.....
.....
8. On average, how many tourists do you handle per year?
.....

APPENDIX 4

FOOD AND CASH CROPS IN KILIFI DISTRICT, 1976 - 1982

CROPS	UNITS	1976	1977	1978	1981	1982
MAIZE	Ha.	23,678.82	39,303	25,000	41,440	26,450
	Bags	118,394.1	982.575	400,000	285,111	75,555
	Bags/ha	5	25	16		
CASSAVA	Ha.	5,270.69	5,170	4,000	5,870	5,090
	Tons	-	-	-	78,300	101,800
	Tons/ha	-	-	-	13.34	20
SORGHUM	Ha.	220.20	100	59.7	96	93
	Tons	-	-	-	57.6	26
	Tons/ha	-	-	-	0.6	0.27
RICE	Ha.	331.35	627	222.3	1,030	1,343
	Kg.	-	-	77,805	1,030	1,343
	Kg./Ha	-	-	-	-	-
SWEET POTATOES	Ha	-	627	-	20	47
	Tons	-	-	-	200	470
	Tons/ha	-	-	-	10	10
CASHEW NUTS	Ha.	16,153.12	16,324	16,477.11	16,690	16,902
	Tons	-	6,121.42	8,719.36	12,520	3,800
	Tons/Ha	-	0.37	0.52		0.7
COCONUTS	Ha.	16,821.45	17,019.68	17,219.68	18,590	19,006
	Tons	-	-	-	8,364	8,550
	Tons/Ha	-	-	-	0.45	0.4
SESAME	Ha.	3,104	3,548	3,246.32	6,150	2,900
	Tons	-	-	-	2,900	870
	Tons/Ha	-	-	-	0.6	
SISAL	Ha.	270.4	478	-	10,000	10,000
	Tons	-	4,000	-	-	18,400
	Tons/Ha	-	-	-	-	2.3
COTTON	Ha	7,221.25	7,442.2	4,559.26	7,000	3,705
	Tons	-	-	-	-	1,480
	Tons/Ha	-	-	-	-	0.40

Source: Ministry of Agriculture District Annual Reports,
1976 - 82.

APPENDIX 5

INFRASTRUCTURE QUESTIONNAIRE

- (a) Service
- (b) Authority responsible
- (c) Source of supply
- (d) Extent of supply
- (e) Maximum supply capacity
- (f) Land requirement
- (g) What is the effect of tourism development on the provision of basic infrastructure?
 - (a) a strain to supply
 - (b) no problem
- (h) Does the tourism industry contribute directly to the provision of infrastructural services?
 - (a) Yes (b) No ..i.....
 - (i) If yes, what percentage of the total cost
-.....-
- (j) Future plans
.....
.....-.....-.....-

APPENDIX 6

RESIDENTS TOURISM SURVEY

1. (a) Sex (b) Age
Nationality
2. Occupation
3. Income (per month approx.)
4. Income from tourist-related activities:
activity
income
5. How do you benefit from tourism?
(a) Sale of agricultural products
(b) Sale of fishing products
(c) Sale of gift articles
(d) Entertainment
(e) Transport and tour operations
(f) Lease of accommodation and lodge facilities
(g) Other specify
6. What are the socio-cultural effects? Explain
your answer on the back
(a) Good (b) bad.
7. Do you benefit from tourist facilities? Explain
your answer on the back
(a) Yes (b) No (c) No idea
8. If not, why?
.....
9. Should tourism development be intensified: (a)
Explain on the back.
(a) Yes (b) No (c) No opinion.
10. If not, why not

11. Ownership of premises or dwelling:

- (a) Owner occupied
- (b) Rented
- (c) Staff house
- (d) Other (specify)
.....

12. Rent per month (in KShs.)

13. Services provided:

- (i) Water supply
- (a) Piped water for each household.....
- (b) piped communal (free or fixed rate.
- (c) Rain-water
- (d) Spring/well/stream
- (e) Is the service adequate?.....
- (ii) Sewage disposal:
- (a) water-borne-
- (b) septic tank
- (c) bucket collection
- (d) pit latrine
- (e) None
- (iii) Electricity supply -.....
- (iv) Refuse collection

14. Are there any facilities and services you feel this area is deficient in? If yes, what are these?

.....
.....
.....

APPENDIX 7

TOURISTS SURVEY

1. Nationality
2. Mode of arrival to Malindi: (a) By road
(b) By air
(c) By sea
3. Age: (a) under 17 (d) 45 - 58
(b) 17 - 30 (e) above 58
(c) 31 - 44
4. Is this your first visit to Malindi (a) Yes (b) No
If not how many times have you visited Malindi?
.....
5. Intended length of stay in Malindi:
(a) 1 - 3 days (c) 7 - 14 days
(b) 3 - 7 days (d) more than 2 weeks
6. What are the reasons for coming to Malindi?
(a) Because of sunny climate and beaches.....
(b) Culture and folkore
- (c) Deep-sea fishing
- (d) Other - specify
7. What was the basic daily cost of your stay in
Malindi for accommodation and meals on an
individual basis?
(a) Under Kshs 40 (d) 121 - 160
(b) 41 - 80 (e) 161 - 250
(c) 81 -120 (f) above 250.
8. How much have you or intend to spend on gifts
while in Malindi?
(a) Under Kshs. 100 (d) 501 - 700
(b) 100 - 300 (e) 701 - 900
(c) 301 - 500 (f) above 900.

9. How much have you spent on sight seeing and local transport?
- (a) Under Kshs. 60 (c) 101 - 140
(b) 60 - 100 (d) 141 - 180
10. How was sight-seeing and transport organized?
- (a) as tour package from home country.
(b) local tour operator
(c) car hireq.....
(d) local transport
(e) other-
11. What is your opinion on the following in Malindi:
V. Good Good Fair Poor No opinion
- Local attitude towards tourists:
Information service
Telephone service
Ease of reaching Malindi.... -.....
Transportation within Malindii.....
Sanitation-.....
Hotel facilities
Local shopping
Banking services-.....
Beaches-.....
Recreation and sports facilities
Medical facilities-.....
12. Do you intend to visit Malindi again? (a) Yes (b) No.

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