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Examining Kenya's Tourist Destinations' Appeal: the Perspectives of Domestic Tourism Market

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Abstract

Kenya's tourism activity has always been centered on the coastal beaches and a few game parks despite of being endowed with a unique combination of tourist attractions spread throughout the country. Noting this skewed nature of tourism development, this study aimed at investigating the status of appeal of the different Kenya's tourist regions from the perspective of the domestic market with the goal of examining the efficacy of the destination appeal enhancers. Data was collected using semi-structured questionnaires and analysed using mainly descriptive statistics. The study found out that while majority of Kenyans considered taking a holiday as being important to them, a significant majority of them were not be aware of most of the country's touristic attractions and hence, frequented only a few of the country's attractions, mainly the coastal beaches. Further, the study found out that the most important sources of travel information available to Kenyans were personal experience and information from significant others; travel marketers were considered as being the least significant source of information. The study thus, concluded that the limited scope of tourist activities available within most of Kenya's attractions, coupled with the limited sources of travel information may actually be leading causes of the lack of awareness and popularity of most Kenya's tourist attractions. This study thus, recommends a deliberate effort on the part of the tourism policy makers and marketers to enhance the appeal of all the country's attractions and position them as destinations in their own right. This would call for the adoption of a tourism development strategy that not only seeks to promote the country as one destination with varied tourist attractions, but one that would adopt a bottom-up approach, primarily focusing on developing the individual tourist attractions as a way of ensuring a country-wide competitiveness.

Keywords: Destination appeal; Destination appeal enhancers; Destination competitiveness; Tourism development in Kenya; Tourist destination choice sets; Travel information sources

Introduction

The tourism sector in Kenya has been one of the key economic drivers generating approximately 10% of the country's GDP and 9% of total formal employment. In 2010 for instance, foreign exchange earnings from the sector rose by 17.9% to KSh 73.7 billion in 2010 from KSh 62.5 billion in 2009. Further, due to its many linkages to other sectors (including agriculture, manufacturing, banking and finance, wildlife, entertainment and handicrafts), tourism has shown great potential to generate employment and wealth [1]. Such realities have seen the sector being given strategic importance in the country's socio-economic development agenda. For instance, the Economic Recovery Strategy for Wealth and Employment Creation (ERSWEC) 2003-2007 [2] and the Vision 2030 [1], have recognized the contribution of the tourism sector to the country's economic growth, environmental sustainability and creation of job opportunities.

To realize the sectors contribution to the country's socio-economic development, several policies and strategies have been outlined including the National Tourism Master Plan [3]; Tourism Policy [4]; the Tourism Bill 2010 [5], and the Vision 2030 among others. Within the Vision 2030 for instance, Kenya aims to be one of the top ten long-haul tourist destinations in the world, offering a high-end, diverse, and distinctive visitor experience.

However, despite of the country's rich endowment with a unique combination of tourist attractions spread throughout the country (comprising tropical beaches, abundant wildlife in natural habitats, scenic beauty, a geographically diverse landscape and diverse cultures from the country's 42 ethnic communities), tourism in Kenya has always been almost exclusively centered on two geographical areas: the south coast beaches and a handful of game reserves and or national parks [6-8]. Noting this skewed nature of tourism development, this study thus aimed at investigating the status of appeal of the different Kenya's tourist regions from the perspective of the domestic market with the goal of examining the efficacy of the different destination appeal enhancers.

The Essence of Destination Appeal in Destination Competitiveness

Destination appeal has been conceived to be a factor of tourism destination competitiveness. According to "The Calgary Model of Competitiveness in Tourism" by Ritchie and Crouch [9], destination's appeal refers to both destination attractors and deterrents. The model identifies attractors as including eleven elements: natural features, climate, cultural and social characteristics, general infrastructure, basic services infrastructure, tourism superstructure, access and transportation facilities, attitudes towards tourists, cost/price levels, economic and social ties and uniqueness. On the other hand, destination deterrents refer to destination security and safety (i.e. political instability, health and medical concerns, poor quality of

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sanitation, laws and regulations such as visa requirements). Such factors are a formidable barrier to visiting a particular destination [10].

Further, Dwyer and Kim [11] in their integrated model of destination competitiveness identify destination's resources including endowed resources, created resources and supporting resources as being the primary elements that together provide the various characteristics of a destination that make it attractive to visit, the foundations upon which a successful tourism industry is established and thus they provide the basis for destination competitiveness. The authors identify destination 'endowed resources' as including both 'natural' and 'heritage' resources while 'created resources' refer to such resources as tourism infrastructure, special events, shopping, among others. Supporting resources on the other hand refer to resources such as general infrastructure, accessibility, service quality, among others.

It is important to note that the appeal of a destination has the potential to be enhanced. Several factors have been identified as enhancers of destination appeal. Crouch and Ritchie [12] identify marketing initiatives as a one of the factors that has the potential to enhance the perceived appeal of a destination. Further, Dwyer and Kim [11] identifies destination management factors as being capable of enhancing the appeal of the core destination resources and attractors, strengthen the quality and effectiveness of these primary factors and resources, and best adapt to the situational conditions. The authors identify these destination management factors as including the activities of destination management organizations (DMOs); destination marketing management; destination policy, planning and development; human resource development; and environmental management.

The Domestic Tourism Perspectives on Destination Appeal

While the perspectives of the international visitors and particularly those of tourists from the developed countries, have been the 'benchmark' for assessing destination appeal in most developing countries destinations (for instance in Kenya's case [13], domestic tourists' perspectives can be argued to be an inclusive perspective [14], noting that support of the local industry by the locals can realize improved quality in product and services, maintenance of occupancy levels and ultimately the confidence of international visitors [14,15]. In the current study, therefore, the perspectives of Kenya's domestic tourist market were considered in examining the status of the different tourist regions in the country. This was intended to examine the level of attractiveness of the different tourist regions in Kenya to the domestic tourist market and by extension, the overall tourism demand in Kenya.

Tourism Development in Kenya

Kenya is endowed with a unique combination of tourist attractions spread throughout the country comprising tropical beaches, abundant wildlife in natural habitats, scenic beauty, a geographically diverse landscape and diverse cultures from the country's 42 ethnic communities. Such a rich heritage has seen tourism become a leading economic sector in the country contributing about 12% of the country's Gross Domestic Product and accounting for over 9% of total wage employment [6]. However, despite such a rich potential tourist attractions, tourism in Kenya has always been almost exclusively centered on two geographical areas: the south coast beaches and a handful of game reserves and or national parks [5,7] (Figure 1).

Noting the skewed nature of Kenya's tourism development, the main objective of this study was thus to investigate the destination appeal of the different Kenya's tourist regions with the aim of examining the efficacy of the destination appeal enhancers.

Study Methodology

This study adopted a cross-sectional descriptive survey design. The target population included Kenyan adult urban residents, both citizens and foreign nationals who were considered as being endowed with high disposable income, education, exposure and mobility; factors considered favourable for tourism demand. Data was collected from adult shoppers in a purposely selected up-market shopping mall in Nairobi using semi-structured questionnaires between April and June, 2009. The instrument was developed to capture the main themes being explored in this study including: the profile of the respondents, importance of taking a holiday to the Kenya's domestic tourist market, status of Kenya's tourist attractions, the popularity of Kenya's tourist attractions and, sources of travel information for the domestic tourists in Kenya. Both descriptive and inferential statistics were used to analyze the data. To examine the status of the different tourist regions in the country, a framework developed from the destination choice sets by Hill [16] (Figure 2) was used.

This model suggests that the selection of a vacation destination emerges from a funneling process that consists of four main destination sets: (a) The awareness set includes all travel locations which people might consider as potential destinations before any decision process about their trip has been initiated; (b) The inert set consists of those

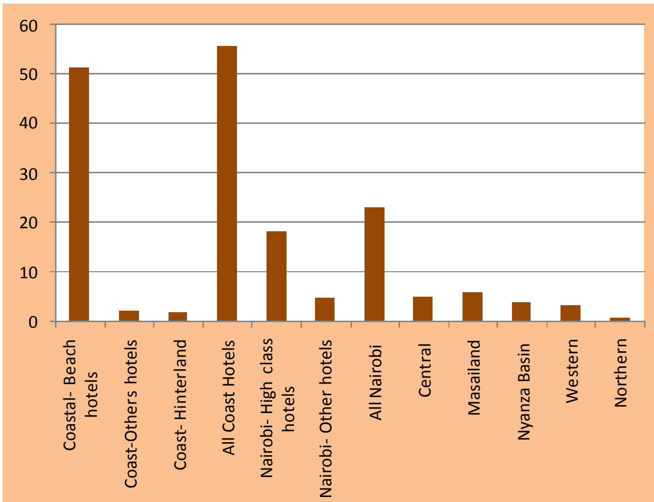

Figure 1: Kenya: Total Hotel Bed – Nights by Zone for 2000-2009 (%) (Source: 5, 6).

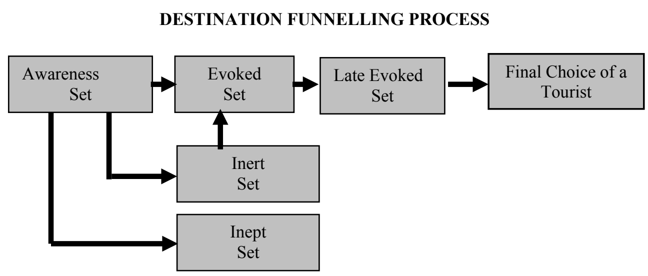

Figure 2: A framework of Destination Choice Sets [adapted from Hill.

destinations that the potential traveler might have too little information to consider; (c) The inept set consists of those destinations that would out rightly be rejected as destinations one would consider visiting; (d) The evoked set includes all the travel destinations which potential travelers might consider being reasonable alternatives in selecting a specific destination. This study thus examined the position of the 33 nature-based tourist attractions identified by the Kenya Tourist Board (grouped into seven tourist circuits) within these choice sets. The nature-based attractions were used on the basis that Kenya's tourism is mainly nature-based (however of late efforts have been taken to diversify the country's tourist product).The respondents were requested to select the option that best reflected their opinion on each local destination. For destination to be included in any choice set, a response rate of above 25% was considered since there were only four choices provided.

Study Findings and Discussions

Several themes relating to this study were examined. These included: importance of taking holiday among the Kenyan domestic market, the status of the different tourist regions, the level of destination visitation and the sources of travel information for the domestic tourists in Kenya.

Study Respondents' Profile

A total of 118 semi-structured questionnaires were successfully completed. Out of the 118 total respondents, 52% were males and 48% females. 90% of the respondents were Kenyan citizens while 10% were non-Kenyan citizens. The average age of the respondents was 34 years and an average income of Ksh.51, 478. On the marital status, 48% of the respondents were unmarried, 43% married and other marital status, 8%. Majority of the respondents (i.e. 81%) had a college or university level of education. Further, majority of the respondents (76%) cited personal savings as their main source of holiday finances.

Importance of Taking a Holiday to the Kenya's Domestic Tourist Market

Figure 3 below presents the results on the importance of taking a holiday to the Kenyan domestic market. Majority of the respondents considered taking a holiday as either very important (32.2%) or as being important (27.1%). Only a small percentage of 7.6% considered taking a holiday as not being important.

Further, 62% of the Kenyan citizens considered taking a holiday as either important (27.1%) or very important compared to 59 % non-Kenyan citizens. More singles (74%) considered taking a holiday as being important compared to the married (44%). As pertains to gender, slightly more females (65%) considered taking a holiday as being important compared to the males (58%). These finding that more singles considered taking a holiday as being important compared to the married respondents confirms the assertions by Kotler et al, [17] that family commitments serves as a limiting to tourism demand. Further, the Kenyan situation that more female respondents considered taking a holiday as being important compared to the male ones is in line with findings of Chopra [18] that globally, women travelers are increasingly forming the highest growth segment in the travel industry.

The finding that majority of Kenyan citizens consider taking a local holiday as being important to them serves to discount the myth that tourism in Kenya is a preserve for the foreigners [13] and thus, a pointer that local demand exists for the tourism industry and therefore there is need for efforts to attract and develop the domestic tourist market. In addition, the above demographic characteristics could form a worthwhile demographic basis for the segmentation of the Kenya's domestic tourist market. Such a move would form an important step towards destination positioning and market targeting, key elements of any effective product marketing and development.

Status of Kenya's Tourist Attractions

As mentioned earlier, the level of awareness and appeal of the various attractions in Kenya was examined based on the destination choice sets model. For the 33 listed nature- based attractions, 47 of them recorded responses rates of above 25%. Out of these 47 attractions, 46.8% of them were known and considered as possible holiday destinations by the domestic tourist market (thus, the evoked set); the respondents were not aware of 33.3% of them (thus the Unawareness Set); and did not have sufficient information about 20% them (thus, the inert set). None of the attractions was reported as out-rightly being rejected as a possible holiday destination, considering the set response rate of 25% (thus, no inept set) (Figure 4). However, it is important to note on the basis of the set criteria, some of the attractions would fall under more than one set.

Tables 1-3 provide the specific attractions falling within each of the above choice sets.

These findings are quite significant as far as the performance of destination marketing is concerned. The fact that more than 50% of all tourist attractions in Kenya do not form the domestic market preferred set due to scanty or lack of destination information should be of great concern to the destination marketers. This is so noting the significance of domestic tourism in the development of a country's tourism industry.

As observed by Sindiga [15] and Cooper et al. [14], domestic tourism plays a key role in both national and regional economic development. First and foremost, domestic tourist ensures spreading of economic development through visits by metropolitan tourists

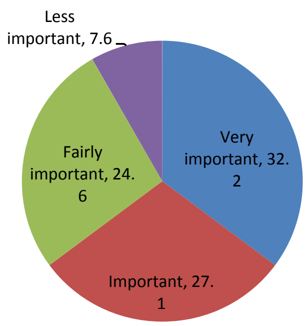

Figure 3: Importance of taking holiday to the Kenya's Domestic Tourist Market.

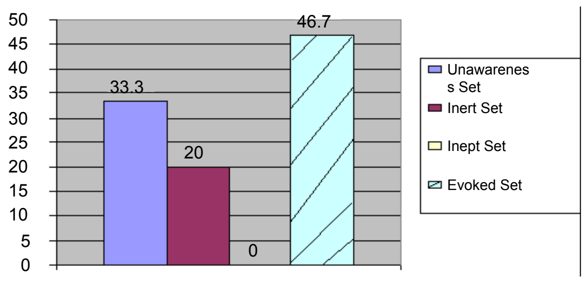

Figure 4: Position of Kenya's Tourist Destinations in the Choice Sets.

	Attraction	Frequency	%		Attraction	Frequency	%
1	Mombasa	80	67.8	13	Mt.Kenya N.Park	54	45.8
2	Masai Mara G. R	78	66.1	14	Lake Bogoria	54	45.8
3	Amboseli	74	62.7	15	Tsavo N.Park	54	45.8
4	Lamu Island	69	58.5	16	Mt. Longonot N. Park	49	41.5
5	Nairobi N. Park	69	58.5	17	Shimba Hills N.P	39	33.1
6	L. Nakuru N. P	68	57.6	18	Samburu N Reserve	38	33.1
7	The South Coast Resort	67	56.7	19	Shaba N. Reserve	35	29.7
8	The North Coast	65	55.1	20	L.Turkana Central Island	34	28.8
9	Arberdare Ranges	61	51.7	21	Kakamega Forest	32	27.1
10	Hells Gate N. Park	60	50.9	22	Oldonyo Sabuk N.Park	31	26.3
11	Malindi & Watamu Resorts	60	50.9				

N=118

Table 1: Tourist Destinations: EVOKED SET ("Aware and would wish to visit").

	Attraction	Frequency	%
1	Mt. Longonot N. P	36	32.7
2	Meru N Park	32	33.3
3	Tsavo N.Park	32	31.1
4	Shimba Hills N.P	29	29.3
5	Mt.Elgon N.P	28	27.5
6	Samburu N Reserve	28	27.5
7	Mt.Kenya N.Park	27	26.2
8	Kerio Valley Reserve	26	26
9	Oldonyo Sabuk N.Park	26	25.74

N=118

Table 2: Kenya's Tourist Destinations: INERT SET ("Aware but I need more information to decide on visiting").

to both popular and less known areas of the country; the flow of investment; distribution of personal wealth; and development of the local infrastructure. In addition, domestic tourism presents a more predictable demand and import substitution, as the country will save on foreign exchange. Moreover, growth in the domestic tourism market would increase the value of a tourist destination and combat issues of seasonality, inequitable geographic tourist spread and limited trip expenditure. Further, support of the local industry by the locals can realize improved quality in product and services, maintenance of occupancy levels and ultimately the confidence of international visitors. This reduces the exposure of the tourism industry to fluctuations in international demand, which is sensitive to changes in the political and economic environment including bad publicity, internal insecurity and poor infrastructure.

Popularity of Kenya's Tourist Attractions

The study sought to examine the popularity of both the individual attractions on the basis of frequency of visitation and return visitation. In terms of the individual attractions, Nairobi National park was the most frequented tourist attraction with 75% of the respondents having visited the attraction followed by Mombasa Island with a visitation rate of 68.6%. Nairobi National Park's popularity may however be attributed to its proximity to the location of the study. The least visited attraction was Rahole national reserve (5%) followed by the Maralal South Island (7%) (Table 4).

When examined on the basis of return visitation, the study found out that the North Coast region was the most popular (FRV% of 87.5), followed by Mombasa (81.5%) the South Coast resort (71.2%) and Malindi and Watamu resorts (63.4%). The least popular destinations were noted as Shimba Hills National park, Sibiloi National Reserve, Saiwa Swamp national park and Rahole National Reserve, each with only one individual having visited the destinations more than once (Table 5).

Of interest to note was the finding that the top four destinations were all based at the Kenyan coast. Further, only the coastal destinations were both highly visited and revisited. This may be attributed to the nature and diversity of tourist products available within these destinations (including beaches, shopping and other attractions). These results confirm previous findings that tourism in Kenya is almost exclusively centred on two geographical areas: the south coast beaches and a handful of game reserves or national parks [7]. It is therefore imperative that for the game parks and reserves to attract return visits, there is need to expand the tourist product mix available at these destinations.

Sources of Travel Information for the Domestic Tourists in Kenya

Together with a number of other factors, the information sources to which the individuals are exposed determine the extent that certain destinations are considered possible alternative choices [19]. Information sources can be classified into two [19,20]: (a) secondary sources (induced, organic and autonomous sources)- basically one perceived before experiencing a destination; (b) primary sources (previous experience and intensity of visit). In-so-far as choice of a destination involves a certain risk, the secondary sources of information play a relevant and essential role in forming images of the alternative destinations to be considered in the decision making process [20]. Mansfed [21] demonstrates that there is general agreement, that the secondary sources of information fulfil three basic functions in destination choices: (a) to minimize the risk that the decision entails, (b) to create an image of the destinations, and (c) to serve as a mechanism for later justification of the choice. The primary sources of information formed by personal experience or visits will influence the perceived image depending on the number of visits and their duration or on the degree of involvement with the place during the stay [20].

	Attraction	Frequency	%
1	Saiwa Swamp N.P	70	59.3
2	Rahole N Reserve	68	57.6
3	Ndeere Island	64	54.2
4	Arabuko Sokoke Forest	62	52.5
5	Sibiloi N.Reserve	55	46.6
6	Kerio Valley Reserve	50	42.4
7	Kisumu Impala Sanctuary	49	41.5
8	Chyulu Hills	46	39
9	Maralal South Island	45	38.1
10	Shaba N. Reserve	43	36.4
11	Buffalo Springs N.Park	42	35.6
12	Kakamega Forest	40	33.9
13	L.Turkana Central Island	40	33.9
14	Mt.Elgon N.P	37	31.4
15	Meru N Park	33	28
16	Oldonyo Sabuk N.Park	32	27.1

N=118

Table 3: Kenya's Tourist Destinations: Unawareness set.

Rank	Attraction	Frequency	%		Rank	Attraction	Frequency	%
1	Nairobi N. Park	88	75		18.	Samburu N Reserve	16	14
2	Mombasa	81	69		19.	Shaba N. Reserve	16	14
3	L. Nakuru N. Park	68	58		20.	Kisumu Impala Sanctuary	15	13
4	Masai Mara G. Reserve	63	53		21.	Meru N Park	15	13
5	The North Coast	56	47		22.	Buffalo Springs N.Park	14	12
6	The South Coast Resort	52	44		23.	Shimba Hills N.Park	13	11
7	Amboseli	50	42		24.	Kerio Valley Reserve	13	11
8	Hells Gate N. Park	47	40		25.	Oldonyo Sabuk N.Park	11	9
9	Lake Bogoria	41	35		26.	Ndeere Island	10	8
10	Malindi & Watamu Resorts	41	35		27.	Arabuko Sokoke Forest	9	8
11	Arberdare Ranges	32	27		28.	Mt.Elgon N.Park	9	8
12	Tsavo N.Park	31	26		29.	Saiwa Swamp N.Park	9	8
13	Mt.Kenya N.Park	31	26		30.	L.Turkana Central Island	9	8
14	Mt. Longonot N. P	30	25		31.	Sibiloi N.Reserve	9	8
15	Kakamega Forest	23	19		32.	Maralal South Island	8	7
16	Lamu Island	23	19		33.	Rahole N Reserve	6	5
17	Chyulu Hills	20	17					

Table 4: Ranked Visitation Frequency of Kenya's Domestic Destination.

Rank	Attraction	FV	FRV	FRV%		Rank	Attraction	FV	RV	RV%
1	The North Coast	56	49	87.5		18.	Chyulu Hills	20	7	35.0
2	Mombasa	81	66	81.5		19.	Arabuko Sokoke Forest	9	3	33.3
3	The South Coast Resort	52	37	71.2		20.	L.Turkana Central Island	9	3	33.3
4	Malindi & Watamu Resorts	41	26	63.4		21.	Mt.Kenya N.Park	31	10	32.3
5	Mt.Elgon N.Park	9	5	55.6		22.	Lake Bogoria	41	13	31.7
6	L. Nakuru N. Park	68	36	52.9		23.	Samburu N Reserve	16	5	31.3
7	Nairobi N. Park	88	46	52.3		24.	Amboseli	50	15	30.0
8	Maralal South Island	8	4	50.0		25.	Masai Mara G. Reserve	63	18	28.6
9	Kakamega Forest	23	11	47.8		26.	Oldonyo Sabuk N.Park	11	3	27.3
10	Lamu Island	23	11	47.8		27.	Meru N Park	15	4	26.7
11	Kisumu Impala Sanctuary	15	7	46.7		28.	Kerio Valley Reserve	13	3	23.1
12	Arberdare Ranges	32	14	43.8		29.	Ndeere Island	10	2	20.0
13	Tsavo N.Park	31	12	38.7		30.	Rahole N Reserve	6	1	16.7
14	Shaba N. Reserve	16	6	37.5		31.	Saiwa Swamp N.Park	9	1	11.1
15	Mt. Longonot N. P	30	11	36.7		32.	Sibiloi N.Reserve	9	1	11.1
16	Hells Gate N. Park	47	17	36.2		33.	Shimba Hills N.Park	13	1	7.7
17	Buffalo Springs N.Park	14	5	35.7						

Key: FV=Frequency of visitation
FRV= Frequency of Return Visits

Table 5: Ranked Visitation Frequency of Kenya's Domestic Destination.

Two sets of information sources were examined in this study: those important for creating destination awareness, and those regarded as important while making the final choice of a destination to visit.

a) Importance of information sources in creating destination awareness

The results indicated that Kenyan domestic tourist market ranked the importance of the different information sources in creating tourist destination awareness as follows: (i) Personal Experience (ii) Friends/ Colleagues/Relatives; (iii) Television; (vi) Print Media; (v) Number of Visits; (vi) Internet and; (vii)Travel Agents/Marketers (Figure 5).

b) Importance of information sources in making final destination choice

On the significance of the different information sources while making the final choice of holiday destination, the different information sources were rated as follows: (i) Personal Experience; (ii) Friends/ Colleagues/Relatives; (iii) Print Media; (iv) Number of Visits; (v) Television; (vi) Internet and; (vii) Travel Agents/Marketers (Figure 6).

As revealed by these results, while the television was considered more significant than the print media (newspapers, magazines, travel brochures and books) in the creation of destination awareness, the print media was considered a more significant source of travel information in the final choice of the domestic tourist destination. Overall, in both the creation of awareness for domestic tourist destinations and when making the final choice of the domestic holiday destination, personal experience and friends/colleagues/relatives were considered more significant, while travel agents and tourism/hospitality marketers were considered the most insignificant.

Whereas, naturally people would tend to trust their personal experiences while making critical decisions such as the choice of a holiday destination, the findings of this study confirm the assertion by Gitelson and Crompton [22], Crompton [23], and Nolan [24] that interpersonal interactions is the most influential source of travel information for destination choice and exerts a normative influence on choice of destinations. More so, while the primary sources of information (previous experience and intensity of visit) will influence the perceived

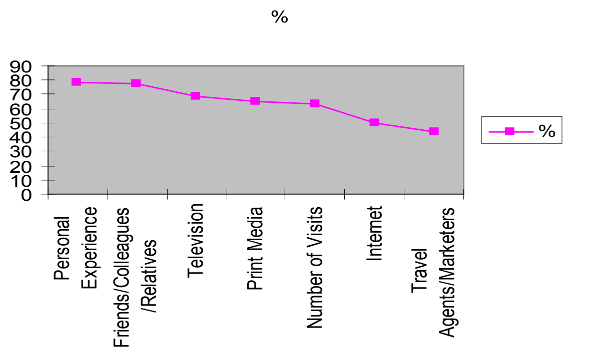

Figure 5: Importance of Information Sources in Creating Destination Awareness.

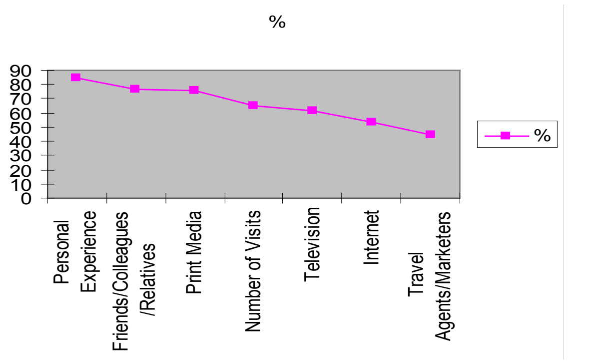

Figure 6: Importance of Information Sources in Making Final Destination Choice.

destination image, in-so-far as choice of a destination involves a certain risk, the secondary sources of information (interpersonal interactions and print media) play a relevant and essential role in forming images of the alternative destinations to be considered in the holiday decision making process [20].

Conclusion and Recommendation

This study revealed that a significant number of Kenyans may not be aware of most of the domestic tourist destinations and confirmed the fact that only a few of Kenya's attractions were frequented by the domestic tourist market (just like the international tourists as evident from the presented government statistics in figure 1. As the study found out, the limited sources of travel information available to Kenyans coupled with the limited tourist activities offered at most of Kenya's attractions may actually be leading factors contributing to the lack of awareness and popularity of most of Kenya's tourist attractions. This therefore, calls for deliberate efforts to enhance the appeal of these attractions and position them as destinations in their own right.

This study thus recommends the adoption of a tourism development strategy in Kenya that would not only seek to promote the country as one destination with varied tourist attractions, but one that would adopt a bottom-up approach, primarily focusing on developing the individual tourist attractions as a way of ensuring a country-wide competitiveness. As argued by Jang and Cai [25], local or regional tourism destinations are identified as the most important destination-type on which to focus developmental initiatives including planning and marketing. The basis of such a regional tourism development strategy is the realization that each region has its own strengths and weaknesses in terms of its position in the minds of the travellers.

The strategy should recognize the varied needs, level of maturity and vision of each region and be supported within the context of the existing regional political/administrative units, as is the practice in successful destinations [25]. This is significant as such units already have established structures that would be necessary for the success of tourism development initiatives. With this strategy, different regions would be challenged to pursue plans that will give them competitive advantage over other regions.

Regional and national partnerships between the private and public sector in tourism development should be embraced as this forms the power behind successful tourist destinations. Tourism marketers for instance, need to play a more aggressive role in providing information to the domestic market and facilitating the making of holiday decisions. The fact that most of Kenya's domestic market rely more on personal experience and the 'significant others' (i.e. others' personal experience) and regard the least the internet and travel agents and tourism/hospitality marketers, clearly indicates the limitations the market faces as far as sources of travel information is concerned. This therefore calls for the tourism marketers to bridge the gap and equally concentrate on the domestic tourist market just like the international market.

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