



REPUBLIC OF KENYA

NATIONAL TOURISM **BLUEPRINT2030**

September 2017

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REPUBLIC OF KENYA

MESSAGE FROM H.E. THE PRESIDENT OF THE REPUBLIC OF KENYA

Travelling and tourism provide an opportunity to meet and make friends, experience other cultures and broaden your worldview, so as to be a citizen of the world who appreciates other people. We welcome all travellers to Kenya. Our country offers amazing options of experiences for the discerning leisure, business, nature, cultural and eco-sensitive travellers. Our people are most warm and friendly and our commitment to sustainable tourism is unrivalled. It is, therefore, incumbent on every one of us in government, private sector and all Kenyans to place our best foot forward to preserve and promote this national heritage.

H.E. Hon. Uhuru Kenyatta, C.G.H

The President of the Republic of Kenya and Commander-in-Chief of the Armed Forces



Foreword by the Cabinet Secretary, Ministry of Tourism

Vision 2030 is our country's long-term national planning strategy for transforming Kenya into a "middle income country providing a high quality of life to all its citizens by 2030". The government of Kenya recognises tourism as a leading economic sector that will help us achieve the Vision 2030. In acknowledgement of this, the Ministry of tourism has developed the National Tourism Blueprint 2030 to propel the sector's growth through a coordinated approach to tourism product development, institutional and stakeholder management, marketing, and the development of people in tourism.

The Kenyan tourism industry has been challenged by a number of factors over the past few years and we have seen international tourist arrivals suffer due to shocks, such as the global economic crisis and global terrorism. We have, however, through various initiatives such as PR and media campaigns, managed to deal positively with the challenges facing our tourism industry. This has been attested to by the increase in tourist arrivals in 2016. The sector also had to contend with its own systemic challenges, like concentration in only a few parts of the country, limited product diversity, limited markets, the seasonality of tourism, service quality challenges among others. There is therefore more work that still needs to be done to ensure our tourism sector reaches its full potential.

As set out in this Blueprint, our vision is to achieve a booming and sustainable tourism industry that is vibrant and innovative, and where local, African and international visitors can freely explore iconic Kenya. We want to see our visitors connect with our unique people through the diverse tourism experiences that we have to offer.

The Blueprint identifies how we will enhance our existing core tourism strengths so as to grow tourist arrivals. It further identifies new opportunities related to new tourism products and markets, the people development that will catalyse further expansion in tourist arrivals, and the growth and spread of the tourism industry's economic benefits.

Successful implementation of the National Tourism Blueprint 2030 requires that all tourism industry stakeholders work in synergy. We have therefore looked very carefully at how best to institutionalise implementation of the Blueprint so that we can effectively implement it, together. I am indebted to all that helped to deliver the Blueprint, and thank all tourism stakeholders and Kenyans for the robust discussions that characterized the Blueprint's development.

This Blueprint calls for new innovative approaches in managing the Kenyan tourism sector so as to achieve Vision 2030. It further provides us the tools and guidelines for achieving this. I am therefore confident that it will take our tourism to the next level, and reclaim Kenya's position as a leader in this sector. We thank you all stakeholders and the Kenyan public for your contributions to the development of the Blueprint and look forward to an exciting future for Kenya's tourism.

A handwritten signature in black ink, appearing to read 'Najib Balala', with a large, sweeping flourish above it.

Hon. Najib Balala, EGH
Cabinet Secretary for Tourism



Foreword by the Principal Secretary, Ministry of Tourism

The National Tourism Blueprint 2030 is the transformational framework for the tourism sector. It departs from the traditional tourism approaches to vibrant, innovative and inclusive propositions that seek to provide unforgettable experiences to visitors and ensures that the tourism resources benefit the Kenyan communities.

It aims at ensuring that the sector continues to thrive within the requisite enabling environment. Furthermore, it seeks to ensure that efforts by all tourism players in Kenya are well coordinated so that the necessary synergies are developed and enhanced at all levels, both within the private and public sectors. The framework sets the pace towards making tourism a key catalyst of the country's economy.

Its development was a passionate, collective labour from the tourism trade, public sector, county governments and tourism stakeholders.

We gratefully acknowledge the people that participated in the realization of the Blueprint. TradeMark East Africa provided the funding that enabled us to develop the Blueprint. Delivering the Blueprint required dedicated coordination and leadership at the technical level. This role was assigned to the Tourism Secretary, Mr. Said Athman.

The National Reference Group (NRG) that comprised of KTB, KATA, PERAK, KAHK, BKB, KUC, TMEA, KWS, KAAO, KTPU, TRA, KATO, the TS, CoG, TRI, EK, KFT, KICC, and chaired by myself was a valuable platform through which emerging tourism issues were synthesized, ventilated, and agreed upon.

Many tourism stakeholders also participated enthusiastically in the various fora that were organized as part of the process of developing this Blueprint. The stakeholders were drawn from all tourism areas in the country. The views and information provided by the stakeholders are what formed the basis of the design thinking that underpins this Blueprint. We are grateful to all the tourism stakeholders for the candid views that they willingly provided, and which helped shape this Blueprint.

Our gratitude to Grant Thornton, who graciously facilitated the processes that led to the development of this Blueprint, within strict constraints of time.

To all that contributed in one way or another in the development of this Blueprint, we are sincerely grateful, and wish you God's blessings and mercies. We look forward to working together in the roll-out of the Blueprint.

Most of all, a special thanks to Cabinet Secretary, Hon. Najib Balala, who led from the front, for his leadership, passion and strong commitment to the transformational agenda.

A handwritten signature in black ink, appearing to read 'Fatuma Hirsi Mohamed'.

**Fatuma Hirsi Mohamed (Mrs.), CBS
Principal Secretary.**



Foreword by TradeMark East Africa

We are delighted to have been involved in developing the National Tourism Blueprint 2030, the very first for Kenya. Tourism currently contributes 10.5% to the Country's GDP and more importantly, contributes significantly to job creation. It is therefore a powerful driver of economic growth with multiple backwards and forward economic linkages.

Current performance by the industry is encouraging. The country's tourism industry continues to show resilience amid past challenges. Recent implementation of the tourism recovery strategy has provided some short-term relief, together with initiatives to improve security and perceptions about the destination. These efforts have paid some dividends as demonstrated by improved tourism arrival numbers and hotel bed occupancies as reported in the last one year. This increase was driven by reduced park fees, charter flight incentives and enhanced visa facilitation. This tourism blueprint, however, seeks to provide a long-term strategy to address critical drivers and enablers for long term growth and sustainability of the sector. It aims at bridging the gap between supply and demand, within the context of the regulatory, physical and socio-economic environment.

This blueprint integrates sub-strategies which are interdependent, forward-thinking, and adaptive. It provides the country with a model to capitalise on its existing and emerging tourism resources, while responding to changing industry requirements and evolving social and environmental sensitivities. It also seeks to guarantee sustainability and conservation of the country's natural resources.

To tap the enormous tourism potential, TradeMark East Africa (TMEA) recognises that a coordinated strategic approach will be required. As the

development of the Blueprint was anchored on extensive consultations with principal stakeholders whom we acknowledge with appreciation, we at TradeMark East Africa (TMEA) are very satisfied that we have achieved the first step in positioning Kenya as a key tourism destination. Successful execution of this transformational framework will require collaborative and constructive multi-level partnerships between the public and private sectors, as well as national and county governments, and with the donor community, civil society and citizens.

TMEA commits to working with all partners in facilitation of the implementation of this transformational framework for Kenyan tourism. We are already working with the Ministry and the Kenya Ports Authority (KPA) in upgrading the Mombasa Port Passenger terminal facilities at the Port of Mombasa; an intervention that aims to expand Kenya's tourism offering and ultimately increase the number of tourist arrivals.

I believe that with the full implementation of this Blueprint, tourism will grow from strength to strength, and continue to provide visitors to Kenya with unique, pleasant and unforgettable experiences, as well as consistently create more jobs and contribute to the country's growth. However, this will require a shift in the way things are done in the tourism sector, as outlined in this new blueprint.

Asanteni Sana

Frank Matsaert
Chief Executive Officer
TradeMark East Africa

SECTION 1

Introduction & Approach



Kenya National Tourism Blueprint 2030

Introduction & Approach

May 2017

		Page
8.2	Strategic Thrusts	3
9.	Institutional & Stakeholder Structure	1
9.1	Institutional Structure Strategic Thrusts Summarised	3
9.2	Thrust 1 - Create & Amend & Restructure the Public Sector Institutions	4
9.3	Thrust 2 - Raise the profile of the Tourism Industry within Parliament and Cabinet, with the Counties and in the economic and Industrial spheres by way of Budget Allocation	14
9.4	Thrust 3 - Create strong linkages to other Ministries & between Counties and National Government & Entities: Coordination within Government and Stakeholders	15
9.5	Thrust 4 - Develop strong collaborative partnerships with industry (Private Sector)	16
9.6	Tourism Roles	18

Section 1
Introduction &
Approach

Overview

Foreword

1. Introduction & Approach

2. Innovation and Change & Strategic Direction

3. Detailed Strategy – Product Strategy

4. Detailed Strategy – Infrastructure Strategy

5. Detailed Strategy – Investment Promotion Strategy

6. Detailed Strategy – Marketing Strategic Direction

7. Detailed Strategy – Human Resource Strategy

**8. Detailed Strategy – Research and Knowledge
Management**

9. Detailed Strategy – Institutional Structure

1. Introduction

1.1 Project Objectives

The Kenyan tourism industry plays an important role in the economy of Kenya but the industry has experienced challenges in recent years due to the negative impacts of events such as the terrorist attacks in Nairobi in 2013. This, together with a lack of competitiveness in tourism product supply with other African regions, has contributed to lower levels of demand for tourism.

The Government of Kenya, with financial support from TradeMark East Africa, has identified the need to develop a Kenya National Tourism Blueprint 2030 (“**Tourism Strategy**” or “**KNTB2030**”). The Tourism Strategy is intended to identify critical drivers and enablers of tourism growth for the country and will provide a practical implementation plan towards the achievement of the country’s overarching tourism and economic goals.

The objectives of the project are as follows:

- Provide a framework and strategic direction for the Ministry of Tourism, its state agencies and stakeholders in the tourism industry;
- Set policies and identify programmes that will make tourism a catalyst and engine in economic development and attainment of middle income status as stipulated in the Vision 2030 Blueprint; and

- Set policies and identify programmes that will make tourism a catalyst to sustainable national development, engine in protecting the environment and preservation of cultural heritage, creating shared value of tourism to surrounding communities and enhancing gender equality.

1.2 Approach and Methodology

The Tourism Strategy is being developed using the following phases:

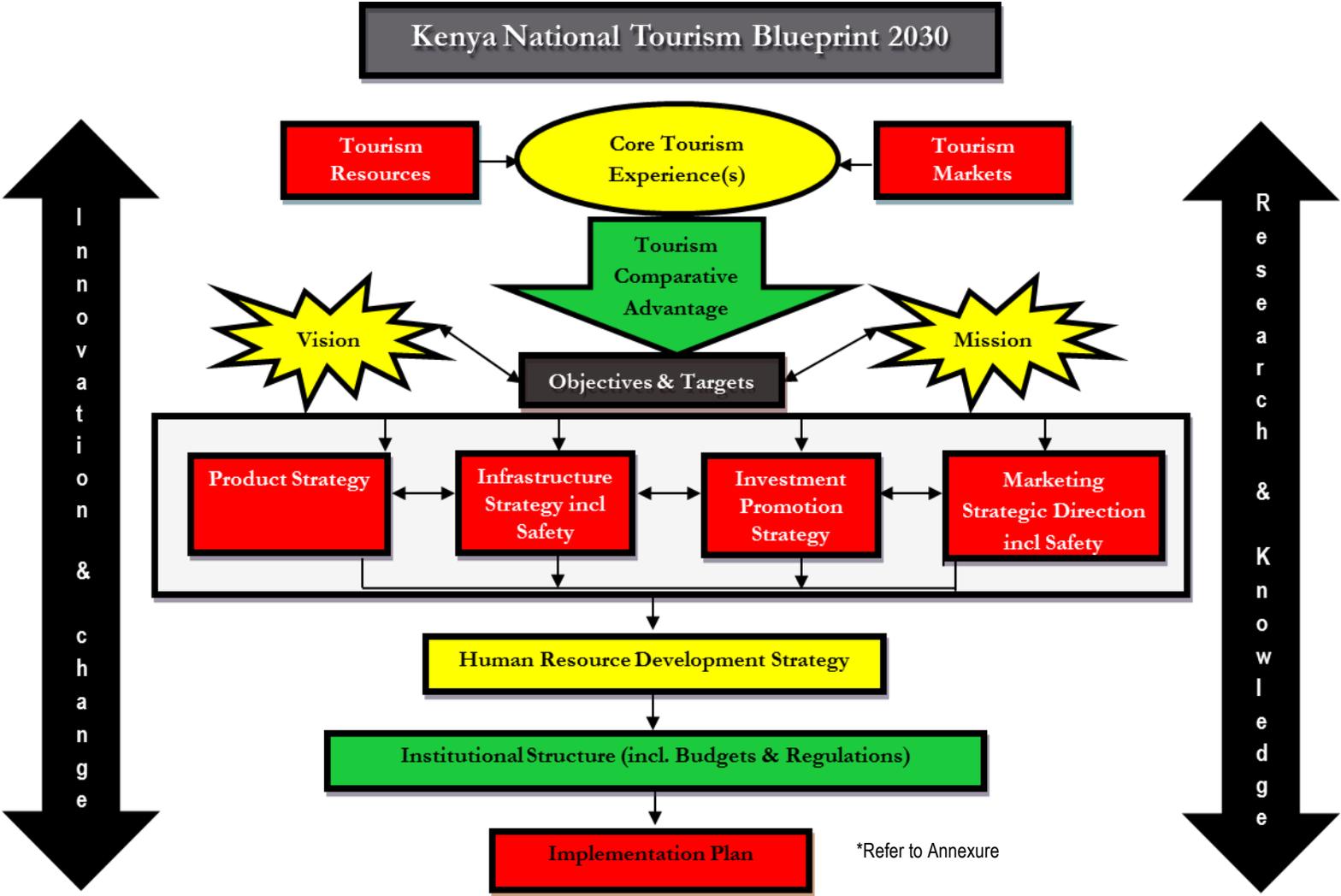
Phase 1: Project Inception and Diagnostics;

Phase 2: Tourism Strategy Formulation; and

Phase 3: Implementation Plan and Final Tourism Blueprint.

This report presents the deliverable for Phase 2: Tourism Strategy Formulation.

The Tourism Strategy should guide the development of the tourism industry within Kenya on a macro (or national) level to both the public and private sector. In essence, the Tourism Strategy is intended to bridge the gap between supply (of tourism products, facilities and services, etc.) and demand (of international, regional and domestic tourists), but within the context of the regulatory, physical and socio-economic environment. The Tourism Strategy will integrate a number of sub-strategies/plans which are interdependent. The following figure indicates the Grant Thornton Tourism Destination Strategy Model adjusted for Kenya.



*Refer to Annexure

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Table 1.1 Detailed activities undertaken during the strategy formulation phase

MAIN STEPS	DETAILED TASKS UNDERTAKEN
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MAIN STEPS	DETAILED TASKS UNDERTAKEN
<p>Develop a draft tourism strategy framework for Kenya</p>	<ul style="list-style-type: none"> ▪ The following points below indicate the various sub-strategies that will be included in the Tourism Strategy under the 'main steps' with the types of information that will be included in each sub-strategy under 'detailed tasks to be undertaken' ▪ This may be expanded or refined during the course of project in consultation with the PSC & national reference group ▪ We will incorporate interventions related to innovation & technology throughout the various sub-strategies
<p>Strategic direction</p>	<ul style="list-style-type: none"> ▪ Purpose of & High level Direction for the Tourism Strategy ▪ Summarise Products/Experiences & Comparative Advantage (USPs) from Diagnostics Report ▪ Vision & mission ▪ Guiding principles ▪ Objectives & targets (quantified) ▪ Strategic thrusts
<p>Marketing strategy</p>	<ul style="list-style-type: none"> ▪ Guiding principles ▪ Marketing objectives ▪ Tourism branding & positioning ▪ Tourism market segmentation ▪ Tourism marketing distribution ▪ This will include broad product/experience & market matching
<p>Tourism product development strategy</p>	<ul style="list-style-type: none"> ▪ Identify core tourism experience recommendations, identify potential catalytic tourism development projects & market-product matching ▪ Recommendations on required tourism attraction, facilities & services development ▪ Recommendations on tourism grading ▪ Recommendations on key hard infrastructure development requirements ▪ Recommendations on key transport infrastructure requirements ▪ Recommendations on improvements to accessibility, including passenger airlift ▪ Link the tourism product development strategy to the marketing strategy ▪ Link the tourism product development strategy to the people development strategy ▪ Linkages to other regional destinations
<p>Tourism investment strategy</p>	<ul style="list-style-type: none"> ▪ Identify investment product & market segmentation (opportunities & investors) ▪ Identify public infrastructure investments ▪ Formulate strategies to mitigate challenges to tourism investment ▪ Link the tourism investment strategy to the tourism product development strategy
<p>People development strategy</p>	<ul style="list-style-type: none"> ▪ Identification of skills/training & capacity needs in respect of the Tourism Strategy & skills required to implement the strategy ▪ Recommendations on training institute requirements ▪ Recommendations on other skills development interventions e.g. linkages/mentorships ▪ Service excellence

MAIN STEPS	DETAILED TASKS UNDERTAKEN
Safety & security	<ul style="list-style-type: none"> ▪ Infrastructure interventions ▪ Marketing interventions ▪ Institutional interventions
Policy, strategy & research recommendations	<ul style="list-style-type: none"> ▪ Efficient management of tourism ▪ Collaborative effective partnerships ▪ Adequate funding for the tourism function(s) (sustainable tourism funding model) ▪ An appropriate regulatory framework ▪ Research & knowledge management ▪ Monitoring & evaluation ▪ Promotion of green principles in tourism ▪ Responsible tourism
Institutional framework	<ul style="list-style-type: none"> ▪ Make recommendations on the most appropriate tourism institutional structure, taking into consideration existing structures within the public & the private sector ▪ We will identify appropriate institutional structures for the management, development & marketing of the tourism industry, including the broad roles & responsibilities of such structures ▪ The framework will identify mechanisms for industry engagement & collaboration ▪ We will ensure that the recommendations are aligned to international best practice in terms of tourism destination management
Final Tourism Strategy Framework	<ul style="list-style-type: none"> ▪ Incorporate comments from the key stakeholders into the tourism strategy framework report & finalise the document
Deliverable	Tourism Strategy Framework Report

1.3 Abbreviations

- BASA – Bilateral Air Service Agreement
- CBO – Community Based Organisations
- CBT – Community Based Tourism
- CEC – County Executive Committee
- EAC – East African Community
- FDI – Foreign Direct Investment
- GDP – Gross Domestic Product
- IATA – International Air Transport Association
- ICAO – International Civil Aviation Organisation
- ICC – International Convention Centre
- ICT – Information and Communications Technology
- IDP – Integrated Development Plan
- JKIA – Jomo Kenyatta International Airport
- KAA – Kenya Airports Authority
- KAHC – Kenya Association of Hotelkeepers and Caterers
- KATA – Kenya Association of Travel Agents
- KATO – Kenya Association of Tour Operators
- KAPU – Kenya Airport Police Unit
- KCAA – Kenya Civil Aviation Authority
- KECOBAT - Kenya Community Based Tourism Network
- KENHA – Kenya Highway Authority
- KES – Kenyan Shillings
- KICC – Kenyatta International Convention Centre
- KQ – Kenya Airways
- KNBS – Kenya National Bureau of Statistics
- KTB – Kenya Tourism Board
- KTF – Kenyan Tourism Federation
- KUC – Kenya Utalii College
- KURA – Kenya Urban Roads Authority
- LOS – Levels of Service
- MDR – Market Development Representative
- NRG – National Reference Group
- NTA – National Tourism Alliance
- PERAK – Pubs, Entertainment and Restaurants Association of Kenya
- PMAESA – Port Management Association of Eastern and Southern Africa
- PPP – Public Private Partnership
- SWOT – Strengths, Weaknesses, Opportunities and Threats
- TF – Tourism Fund
- TFC – Tourism Finance Corporation
- TMEA – TradeMark East Africa
- TRA – Tourism Regulatory Authority
- TRI – Tourism Research Institute
- TVETA - Technical and Vocational Education and Training Authority
- UNWTO – World Tourism Organisation
- VFR – Visiting Friends and Relatives
- WEF – World Economic Forum

1.4 Setting the Scene for the KNTB2030 Development – Synopsis of the Current State of the Kenya Tourism Industry

It is important when developing new strategy to understand the current state of a tourism industry in order to determine which aspects of the industry needs changing or fixing, which needs developing and which should be left as is. This is particularly important where resources are limited and focus or prioritisation is required as is the case for Kenya.

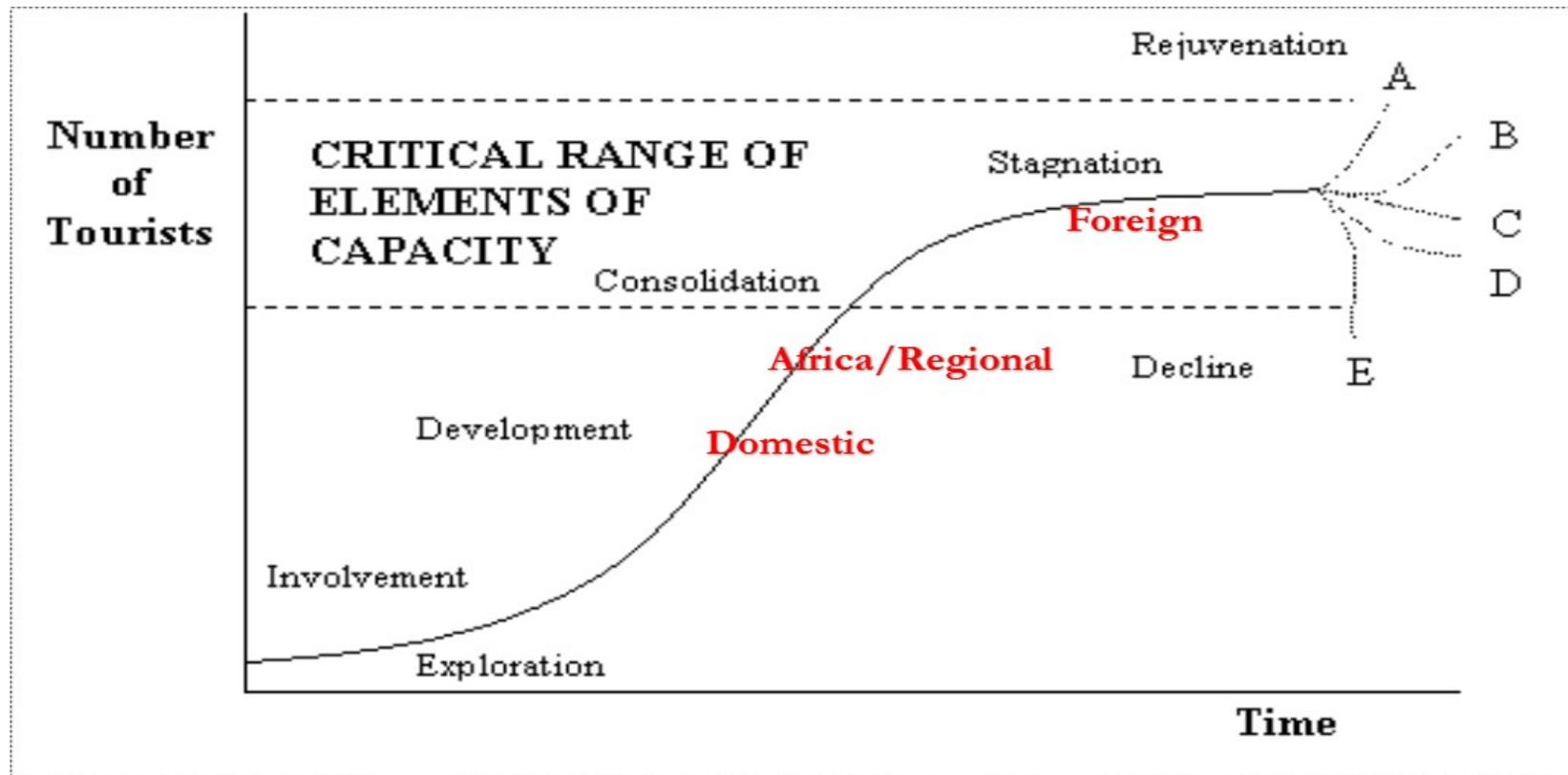
The Kenya Tourism Industry Diagnostics Report provided a detailed assessment of the current status of the Kenyan tourism industry and concluded that the Kenya’s tourism industry is complex and not all functions, markets and experiences are in a similar position in the tourism lifecycle. This complexity is highlighted by the below current status lifecycle graphs which summarises the Kenyan tourism industry status by source market, tourism region and tourism experience dimensions. For each stage in the lifecycle different future strategic direction steps need to be undertaken which requires different structures, budgets, activities, prioritisation etc. as summarised in Table 1.2. All this complexity needs to be addressed in the KNTB2030.

Table 1.2 Tourism Lifecycle Strategic Direction Requirements

Lifecycle Stage	Likely Future Strategic Direction
Stagnation	<ul style="list-style-type: none"> • Innovate/rejuvenate existing products • Develop new products • Increased marketing to existing markets (deeper penetration) • Expansion to new segments of existing markets or new markets
Decline	
Consolidation	<ul style="list-style-type: none"> • Expansion of existing product • Expansion of existing markets/market segments
Development	<ul style="list-style-type: none"> • Development of existing and new product • Development of existing and new markets/market segments
Involvement	<ul style="list-style-type: none"> • Introduction of product • Introduction of new markets/market segments
Exploration	

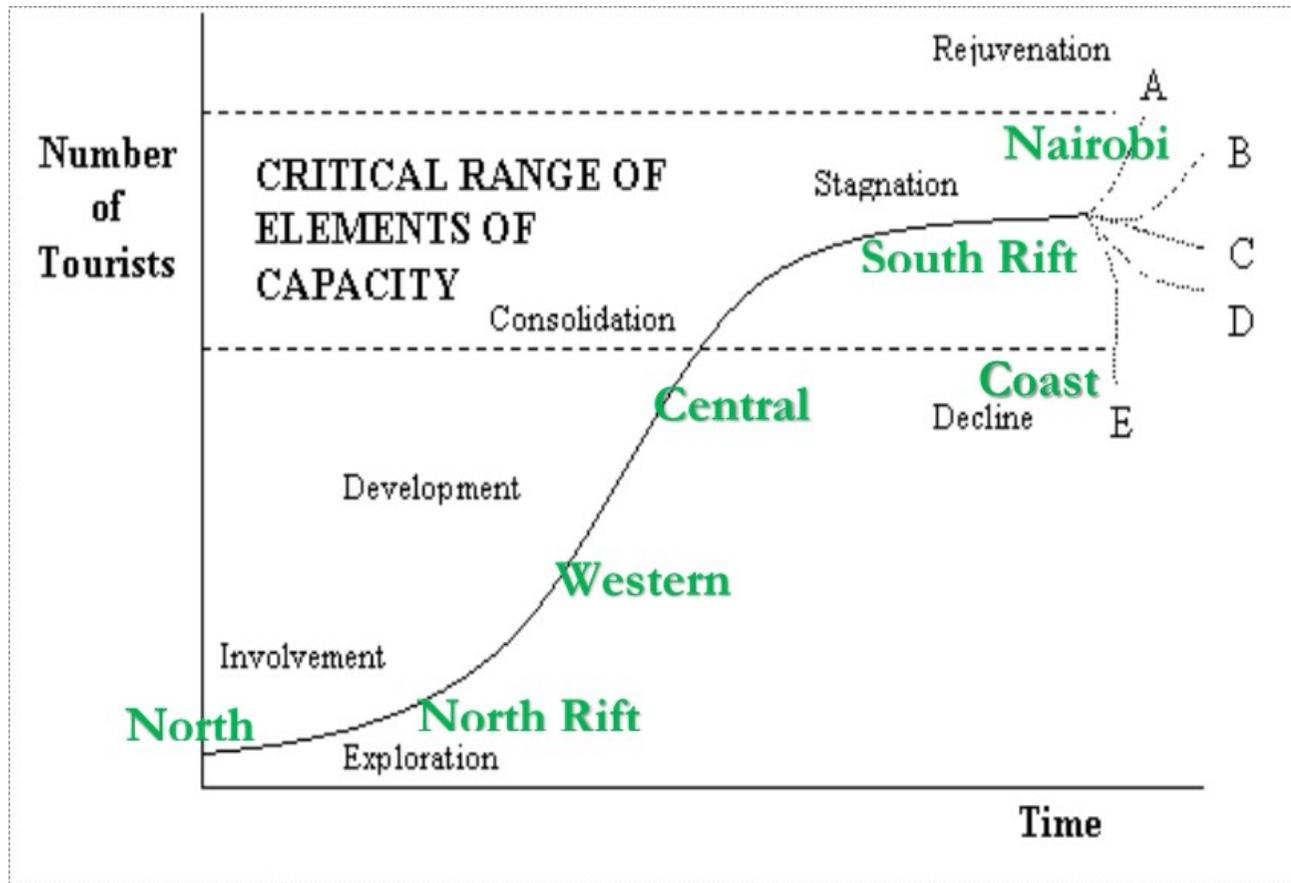
Source: Grant Thornton

Figure 1.2 Primary source market lifecycle status



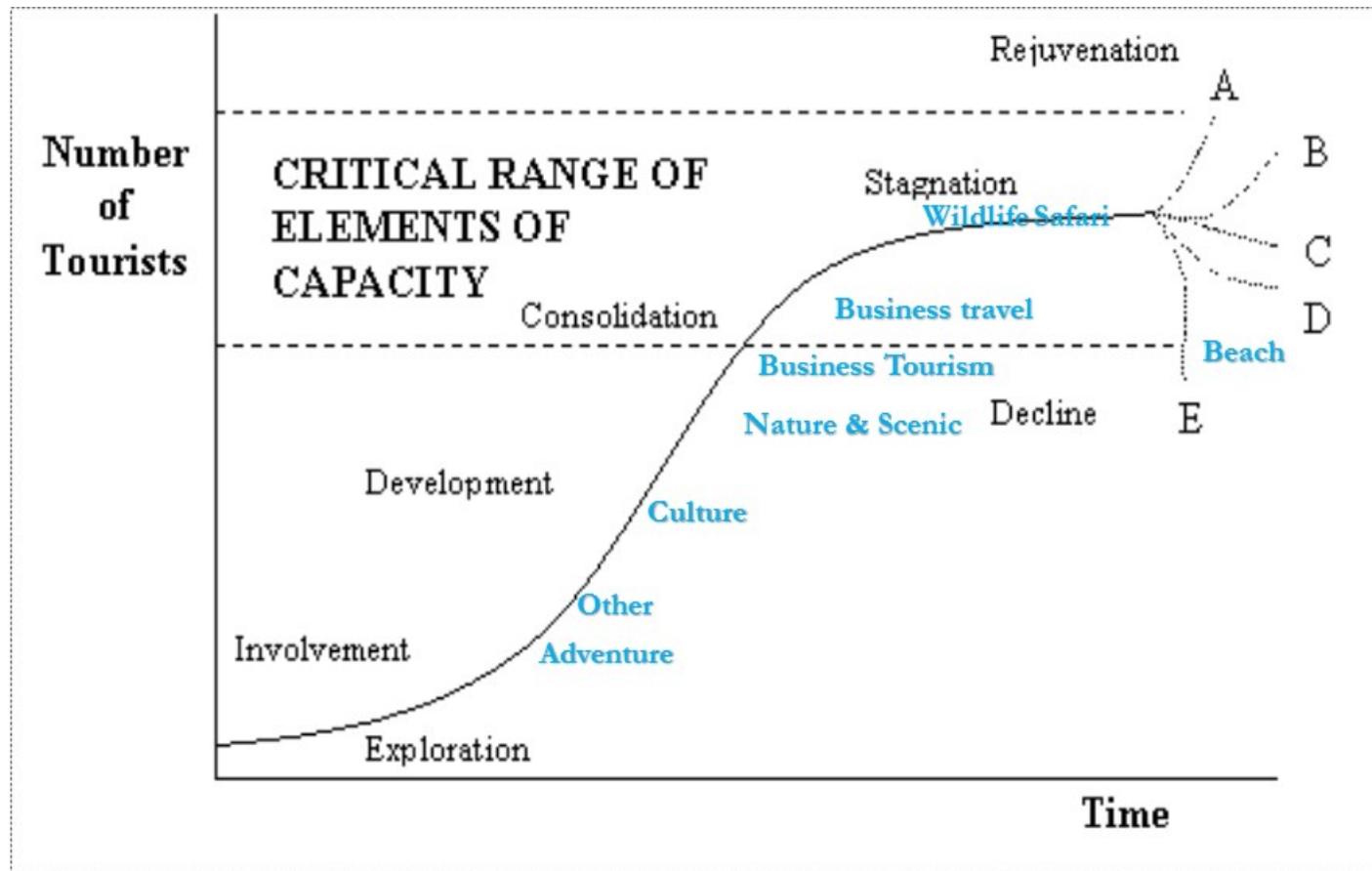
Source: Grant Thornton Conclusion and Stakeholder Validated

Figure 1.3 Tourism region (using KTB regions) lifecycle status



Source: Grant Thornton Conclusion and Stakeholder Validated

Figure 1.4 Tourism experience (using KTB experience classification) lifecycle status



Source: Grant Thornton Conclusion and Stakeholder Validated

A quick glance summary of the current status and the likely future strategic direction for the Kenya tourism industry is provided in Table 1.3. This quick glance emphasizes that a “one size fits all” approach to strategy will not work for the Kenya tourism industry.

Table 1.3 Kenya Current Tourism Industry Status and Likely Future Strategic Direction at a Glance

Lifecycle Stages	Kenya Current Tourism Lifecycle Status	Likely Future Strategic Direction
------------------	--	-----------------------------------

Rejuvenation	Nairobi Region	<ul style="list-style-type: none"> • Rejuvenated products • Rejuvenated markets/market segments
Stagnation	Foreign Tourist Source Market Wildlife Safari South Rift Region	<ul style="list-style-type: none"> • Innovate/rejuvenate existing products • Develop new products • Increased marketing to existing markets (deeper penetration) • Expansion to new segments of existing markets or new markets
Decline	Beach Coast Region	
Consolidation	Business Travel Central region	<ul style="list-style-type: none"> • Expansion of existing product • Expansion of existing markets/market segments
Development	Domestic Source market Africa/Regional Source Market Business Tourism Nature & Scenic Culture Other Niche experiences Western region Adventure	<ul style="list-style-type: none"> • Development of existing and new product • Development of existing and new markets/market segments
Involvement	North Rift region	<ul style="list-style-type: none"> • Introduction of product • Introduction of new markets/market segments
Exploration	North region	

Source: Grant Thornton Conclusion

1.5 Setting the Scene for the KNTB2030 Development – Kenya Tourism Industry SWOT

Based on stakeholder input a detailed Strengths, Weakness, Opportunities and Threats (“**SWOT**”) analysis of the Kenyan tourism industry is provided in Table 1.4.

Table 1.4 Kenya Tourism Industry Key Strengths, Weaknesses, Opportunities & Threats

Strengths	Weaknesses
<p>Core Strengths</p> <ul style="list-style-type: none"> • Kenya has beautiful beaches with calm waters that stretch along the coastline and established resort infrastructure. • Kenya has world renowned wildlife safari destinations, e.g. Masai Mara, with mostly unparalleled diversity and abundance of wildlife compared to other wildlife destinations. Established lodge infrastructure within national reserves. • Growing middle class population. • Kenya is a hub within a growing economic region, much of which is landlocked. <p>Other Strengths</p> <ul style="list-style-type: none"> • Kenya has a diverse range of available types of experiences. • Maasai culture is well known globally. • Kenya has good international air capacity iro of fleet size and connections and good airport capacity and spread. • Basic ICT access infrastructure in major cities/towns and tourist areas is good. • The Kenyan people are extremely warm and welcoming. 	<p>Core Weaknesses</p> <ul style="list-style-type: none"> • Failure to adapt and innovate the tourism industry in line with global trends and the changing world. • Over-reliance on international leisure and a handful of source markets with a reliance on one segment. Highly seasonal. • Poor experience and excessive travel times in cities and between cities due to traffic congestion, poor road conditions, poor access and poor driving. • Expensive – not value for money <ul style="list-style-type: none"> ◦ Perceived as expensive by foreign tourists – accommodation rates, airfares and entrance fees. ◦ Two-tier pricing system. • Enclavic and tightly controlled tourism experience <ul style="list-style-type: none"> ◦ The tourist experience is tightly controlled by small group of tour operators. ◦ Tour operator base predominantly located in Nairobi. ◦ Tourism in Kenya is enclavic with limited things to do en-route to end destinations. • Over-crowding within the Masai Mara detracts from the visitor experience and impacts negatively on the environment. • Much of the accommodation (especially beach resorts and some lodges) tired and require upgrades and/or maintenance. • Perceptions of Kenya as an unsafe destination. • Overall limited financial resources committed to tourism. Tourism and infrastructure budgets often inappropriately allocated. • Marketing activities and Magical Kenya brand weak. <p>Other Weaknesses</p> <ul style="list-style-type: none"> • Limited number of events with poor time and location spread. • Litter and poor levels of sanitation detract from the tourism experience and contribute to environmental degradation. • Marketing and development inertia due to the new county system where clusters, tourism regions, responsibilities and roles are in a state of flux. • There is a general lack of interpretation and provision of visitor information to

Strengths	Weaknesses
	<ul style="list-style-type: none"> enhance the visitor experience at tourism attractions and facilities. There seems to be limited community beneficiation from tourism. There is a lack of good quality tourist accommodation in the mid-market and budget range across the country. Existing tourism and related institutional structure cumbersome with too many entities and limited to no formal links between entities. Overly officious and regulated environment generally.
Opportunities	Threats
<p>Core Opportunities</p> <ul style="list-style-type: none"> Re-positioning the Kenyan coastal destination Take back and re-position the safari experience Business tourism Domestic tourism Regional tourism <p>Other Opportunities</p> <ul style="list-style-type: none"> Untapped international markets and segments Nairobi as a regional aviation hub Nairobi as a continental city destination More balanced year-round tourism Expand the tourism offering geographically 	<p>Core Threats</p> <ul style="list-style-type: none"> Increase in major safety and security incidents Global economic instability Continued lack of budgets and marketing for tourism <p>Other Threats</p> <ul style="list-style-type: none"> Degradation of the natural environment and climate change Successful highly competitive destinations

1.6 Setting the Scene for the KNTB2030 Development – Why is Kenya’s Tourism Industry Underperforming?

Safety and security incidents certainly triggered the downturn in Kenya’s tourism industry in 2011 but it is not the only reason for Kenya’s continuing underperformance. Several other reason contribute to the under-performance:

- Failure to adapt and innovate the tourism industry in line with global trends and the changing world (enclavic, lack of flexibility and information).

- Over-reliance on international leisure and a handful of source markets with a reliance on one segment. Highly seasonal.
- Expensive – not value for money.
- Much of the accommodation (especially beach resorts and some lodges) tired and require upgrades and/or maintenance.
- Continuing perceptions of Kenya as an unsafe destination.
- Overall limited financial resources committed to tourism. Tourism and infrastructure budgets often inappropriately allocated.
- Marketing activities and Magical Kenya brand weak.

THUS Kenya's tourism underperformance more SYSTEMIC than safety related

SECTION 2
Strategic Direction



National Tourism Blueprint 2030

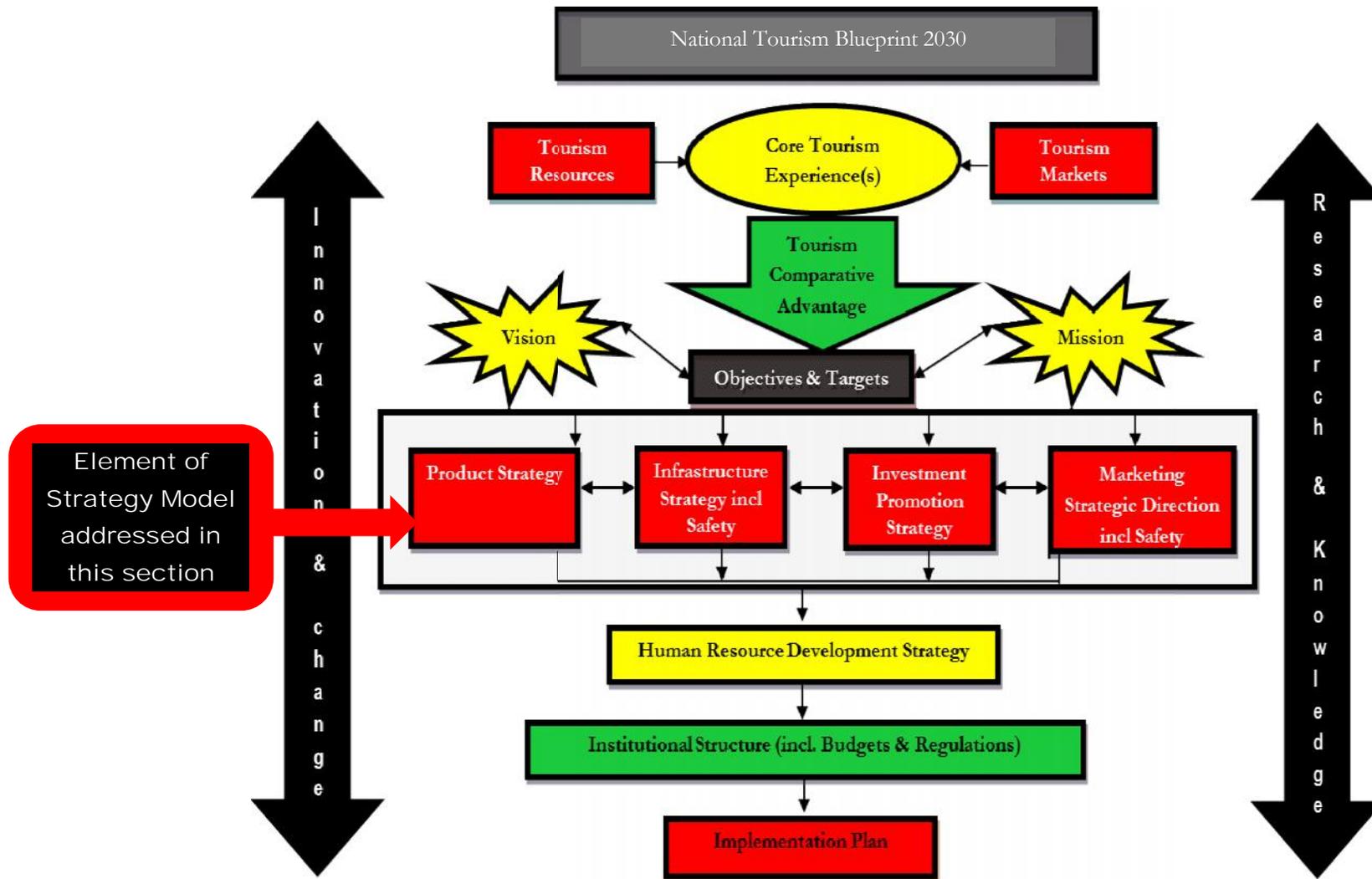
Product Strategy

September 2017

Section 3
Detailed Strategy Product
Strategy

Overview
Preliminaries
1. Introduction & Approach
2. Innovation and Change & Strategic Direction
3. Detailed Strategy – Product Strategy
4. Detailed Strategy – Infrastructure Strategy
5. Detailed Strategy – Investment Promotion Strategy
6. Detailed Strategy – Marketing Strategic Direction
7. Detailed Strategy – Human Resource Strategy
8. Detailed Strategy – Research and Knowledge Management Strategy
9. Detailed Strategy – Institutional Structure





3. Product Strategy

3.1 Principles for Tourism Product Development in Kenya

Tourism product development in Kenya should adhere to the following principles:

“Principles are the **fundamental ideals** which serve as the **foundation for a system of behaviours**”

Principles for Tourism Product Development in Kenya

Market demand led – needs of visitors should be the first consideration in developing tourism products

Tourism product development should **contribute to the achievement of the vision for tourism**

Government should not undertake the development or management of tourism products **where the private sector can perform this role** (and is willing to do so)

The **role of the private sector** is to develop tourism products that is aligned to market needs

There should be a **balance between economic, social and environmental issues** when developing tourism products

Tourism product development planning should be **based on sound research**

The **role of government** is to develop **supportive infrastructure** to ensure that tourism products can be reached by the market, e.g. roads, tourism information signage etc.

Tourism product development must **encourage the use of the tourism resources by visitors and local residents alike**

Tourism product development must be **underpinned by a culture of service excellence**

Tourism product development **should be prioritised**



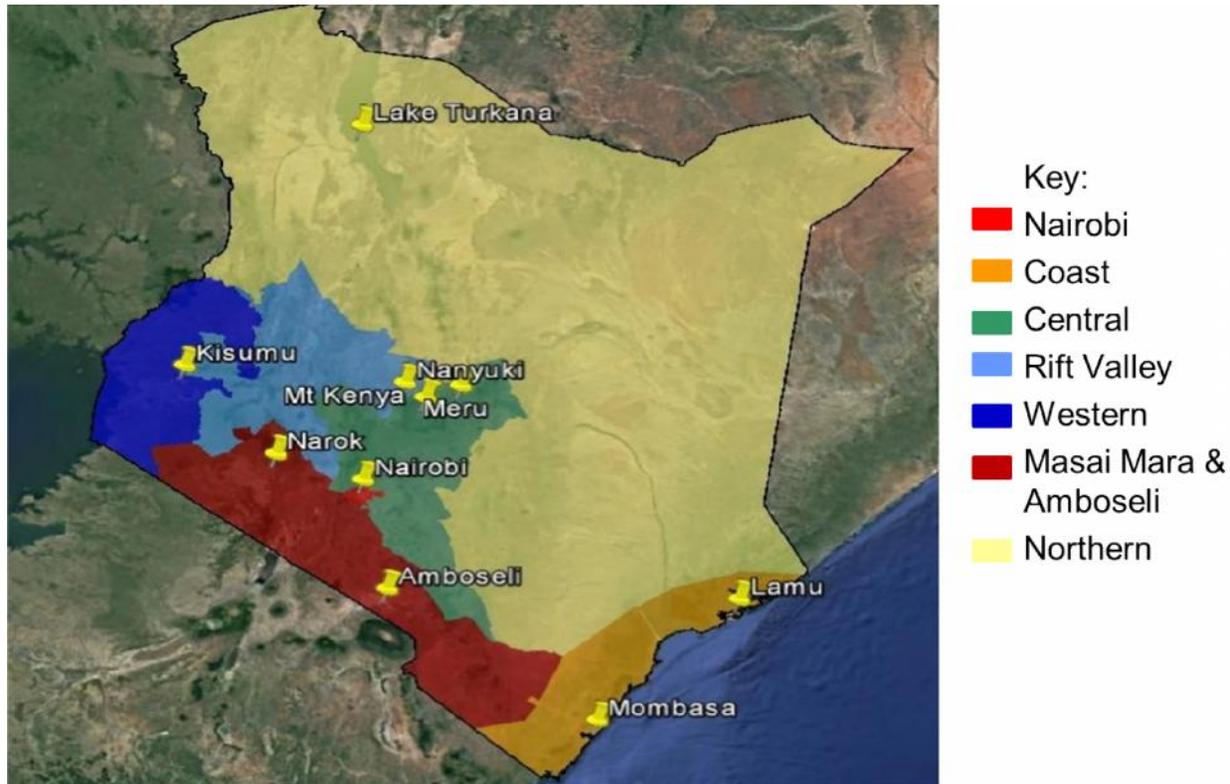
3.2 Kenya's Core Tourism Experiences

Kenya's **core** tourism experiences are shown below. **Core experiences are the main drivers of tourism to Kenya**, whilst the other experiences are secondary experiences that support the core experiences. The figure also indicates which tourism regions (refer to **Figure 3.1** over the page for a map of the tourism regions) have the strongest offerings by core tourism experience.

<u>Experience</u>	<u>Regions with strongest offerings</u>
 Beach & marine	Coast
 African safari	Masai Mara & Amboseli
 Wildlife	Rift Valley, Central & Western
 Nature	Rift Valley, Western & Masai Mara/Amboseli
 Scenic	Central & Northern
 Culture & heritage	Nairobi, Coast & Masai Mara/Amboseli
 City	Nairobi
 Business Tourism	Nairobi, Coast



Figure 3.1 Map of Kenya tourism regions



Source: Google Earth adjusted by Grant Thornton

It is acknowledged that there are other tourism experiences available in Kenya, e.g. Adventure and Desert but these are not considered as core to the attraction base. **Business tourism is also an important tourism experience** given the extent of business conferencing that drives tourism movements to/within selected areas of Kenya.



3.3 Product Market Readiness of the Core Tourism Experiences

The following assessment indicates the state of readiness of the core tourism experiences based on the supply and quality of tourism products (resources, facilities and activities) in combination with the readiness of the market to consume the available products.

Rating of product market readiness:

EXCELLENT = Product ample & good quality; market is ready & has knowledge of the product
VERY GOOD = Product sufficient & generally good quality but with some quality issues; market is ready & has some knowledge of the product
AVERAGE = Some product with a mix of good & poor quality; market is ready & has some knowledge of the product
LOW = Product lacking or has some quality issues; market is somewhat ready but has little to no knowledge of the product
VERY LOW = Product lacking or poor quality overall; market is not ready & has no knowledge of the product

Tourism Experience		Product Market Readiness	Explanation
	Beach & Marine	VERY GOOD	There is ample beach product in the Kenyan Coast region, although some of the product has become tired and requires upgrades or maintenance. The market for beach tourism is strong and high levels of awareness already exist of the available products.
	African Safari	EXCELLENT	The availability of Kenya's safari products is generally outstanding. The market and levels of awareness are both very strong.
	Wildlife	VERY GOOD	Kenya generally has very good supply of wildlife experiences that fall outside of the African safari experience. There are a number of national reserves, parks and conservancies that offer wildlife experiences but there is room for improvement in terms of the quality of some of the products. Market knowledge of the diverse range of wildlife products is good but could be improved.
	Nature	VERY GOOD	There are varied nature-based products available in Kenya to support the nature experience but improvements can be made to enhance these, e.g. by developing activities.



Tourism Experience		Product Market Readiness	Explanation
	Scenic	VERY GOOD	Kenya has some areas that are very high in scenic beauty whilst others are considered average in terms of scenic beauty. The experience could be enhanced by dealing with issues that detract from the scenic experience such as litter. Market knowledge of the scenic experience is good but could be improved.
	Culture & Heritage	AVERAGE	Kenya is rich in culture and heritage (which included history) but improvements can be made in terms of the provision of culture and heritage-related products, activities, interpretation and packaging. Whilst market knowledge of certain elements of Kenya's culture and heritage is very good, e.g. Maasai people, there is room for improvement in the market's knowledge of the diversity of culture and heritage that can be experienced in the country.
	City	VERY GOOD	Nairobi is a vibrant African city that is relatively well known in the market place but the packaging of city products requires improvement. Mombasa also has a city experience to offer visitors (but to a lesser extent compared to Nairobi).
	Business Tourism	VERY GOOD	Nairobi and Mombasa are the two main cities with high levels of business in Kenya with Kisumu also playing a role to a lesser extent. Whilst market knowledge of the business experience is good, it can be improved through enhancements to the existing product base and the development of new products to meet the needs of the business market.



3.4 Kenya's Secondary Tourism Experiences

Kenya's **secondary tourism experiences** by region are as follows:

<u>Experience</u>	<u>Regions with strongest offerings</u>
 Adventure	Coast, Rift Valley, Central
 Sports	Nairobi, Coast, Rift Valley, Central
 Desert	Northern
 Other	Nairobi, Rift Valley, Western

3.5 Product Market Readiness of the Secondary Tourism Experiences

The following assessment indicates the state of readiness of the secondary tourism experiences using the same approach that was followed for the core tourism experiences.

Rating of product market readiness:

- EXCELLENT** = Product ample & good quality; market is ready & has knowledge of the product
- VERY GOOD** = Product sufficient & generally good quality but with some quality issues; market is ready & has some knowledge of the product
- AVERAGE** = Some product with a mix of good & poor quality; market is ready & has some knowledge of the product
- LOW** = Product lacking or has some quality issues; market is somewhat ready but has little to no knowledge of the product
- VERY LOW** = Product lacking or poor quality overall; market is not ready & has no knowledge of the product

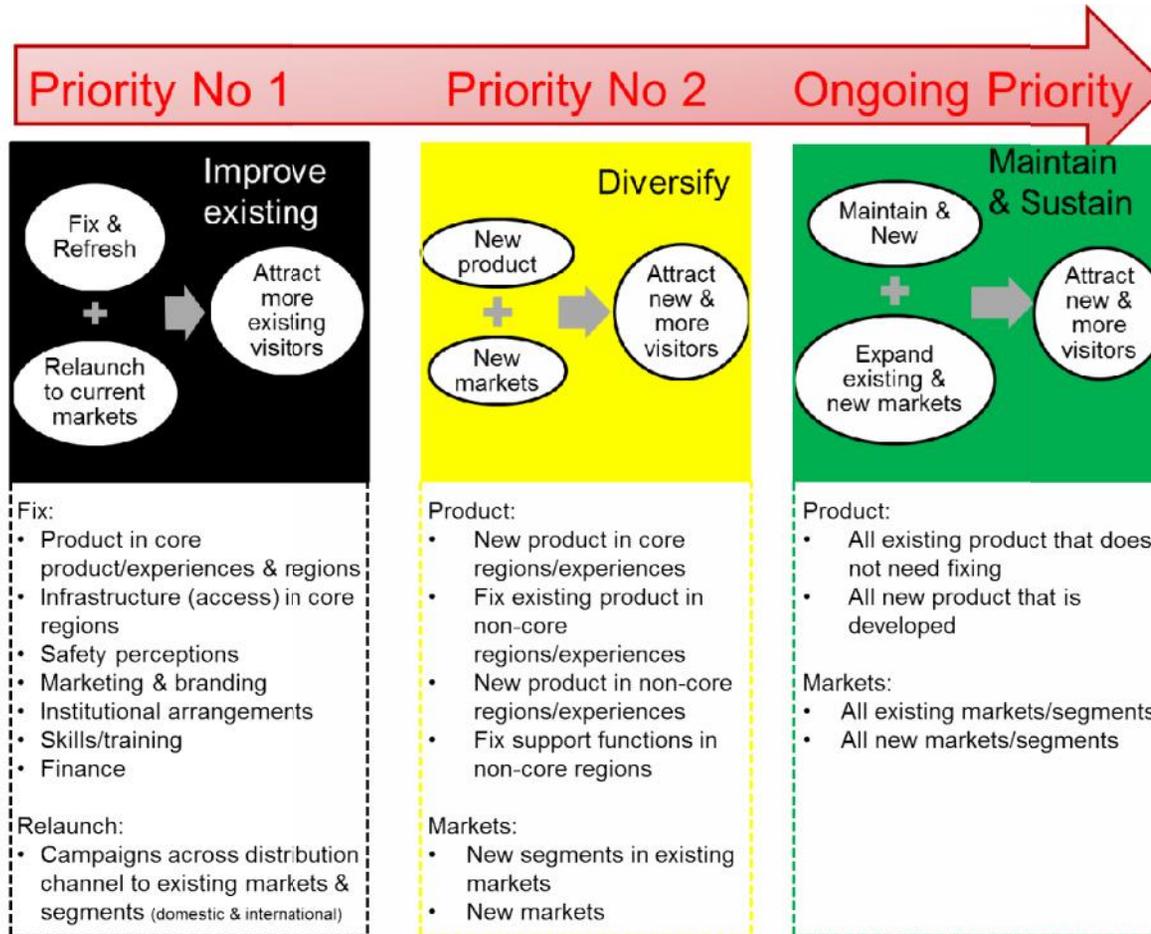


Tourism Experience		Product Market Readiness	Explanation
	Adventure	AVERAGE	Kenya's diverse landscapes and nature resources have the potential to be developed to offer an adventure experience to visitors but there has been limited development of this experience to date. Some of Kenya's regions offer limited adventure activities and market knowledge of these is good but has the potential for significant growth.
	Sports	AVERAGE	Kenya's excellent sporting performance in certain sporting codes is globally well known, e.g. athletics, and there are other sporting codes that currently exist or that have potential for development, e.g. golf, but are not known either due to lack of products or poor packaging and marketing.
	Desert	LOW	The desert environment in Kenya has not yet been developed into an experience and market knowledge of what the country has to offer is low.
	Other: Medical	VERY GOOD	Nairobi has some excellent medical facilities with the potential to draw medical tourists from neighbouring countries or within Kenya. These have not been specifically developed or packaged for medical tourism purposes so some development in terms of products and markets is required.
	Other: Agri-tourism	LOW	Whilst Kenya has a strong agricultural sector, tourism products specifically related to this sector are lacking and market knowledge requires improvement.
	Other: Health & Wellness	LOW	Kenya has some natural resources that lend themselves towards health and wellness tourism, e.g. hot springs, but these require development from a product and market perspective.



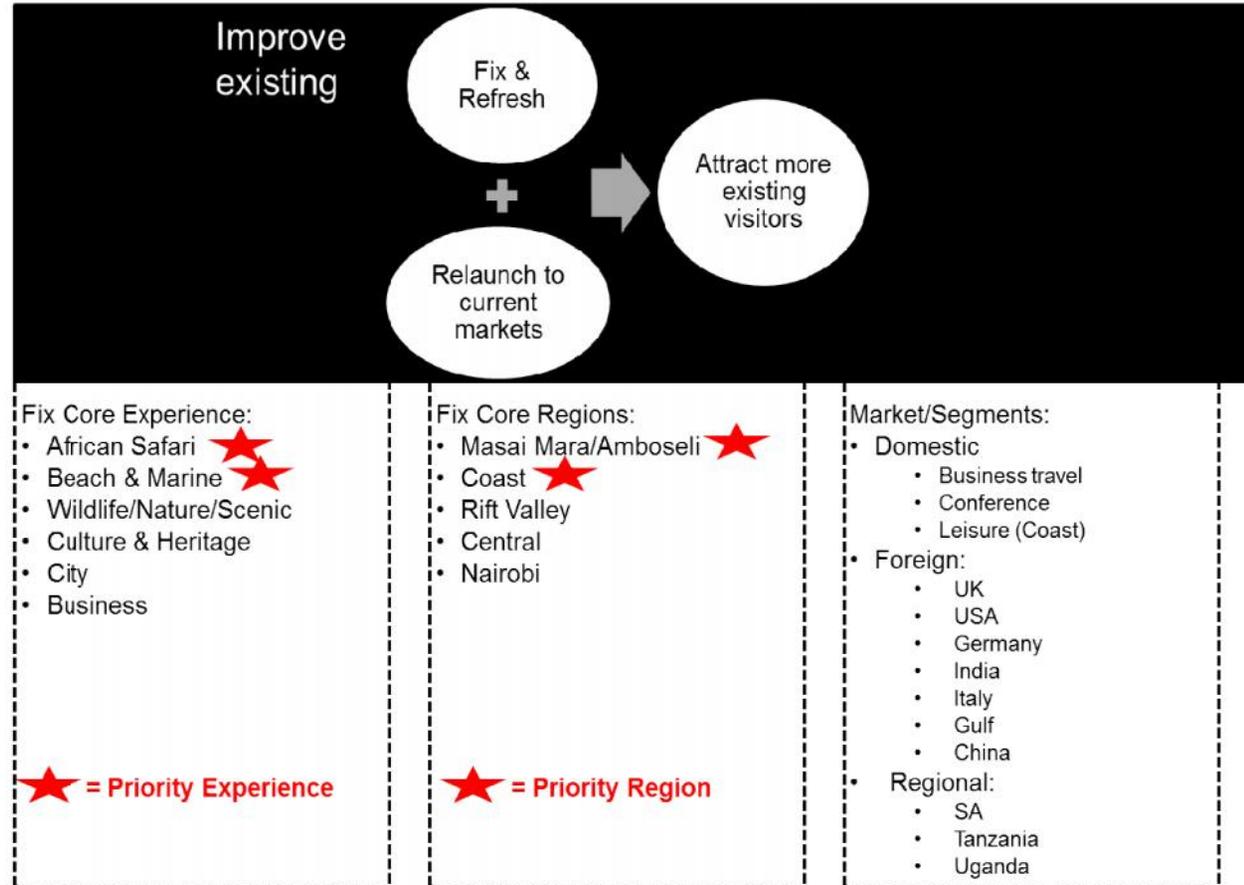
3.6 Product Strategy Strategic Approach

The following strategic approach forms the basis of the Product Strategy (with the Priorities also indicated):



3.7 Product Strategy to Improve Existing Tourism Experiences

The main focus of improving the existing tourism experiences is to fix and refresh the core experiences and the core tourism regions in Kenya. The premise of this approach is that Kenya already has a strong core tourism base which forms the 'bread and butter' of the existing tourism industry. However, the core experiences and core regions are not necessarily performing optimally in terms of the various experiences that are on offer and this needs to be addressed so as not lose the core markets the country is already attracting.



3.7.1 Product Strategy Summary – Improve Existing

The following is a summary of the strategic thrusts that are required to improve the existing core tourism experiences:

Key:

 **First Priority Experiences & Tourism Regions**

Experience	Priority Regions	Strategic Thrusts
 African Safari	<ul style="list-style-type: none"> Maasai Mara & Amboseli 	<ul style="list-style-type: none"> Get the Maasai Mara right Elevate Amboseli's status to 'must see' Develop niche tourism
 Beach & Marine	<ul style="list-style-type: none"> Coast 	<ul style="list-style-type: none"> Refresh and revamp tired beach products Enhance priority beach nodes Develop niche tourism
 Wildlife/Nature/Scenic	<ul style="list-style-type: none"> Rift Valley Central 	<ul style="list-style-type: none"> Enhance iconic scenic tourism experiences Develop activities Interpretation Develop niche tourism
 Culture & Heritage	<ul style="list-style-type: none"> Maasai Mara & Amboseli Coast Nairobi 	<ul style="list-style-type: none"> Fix existing cultural and heritage products Interpretation Integrate Kenyan culture into products
 City	<ul style="list-style-type: none"> Nairobi 	<ul style="list-style-type: none"> Product packaging

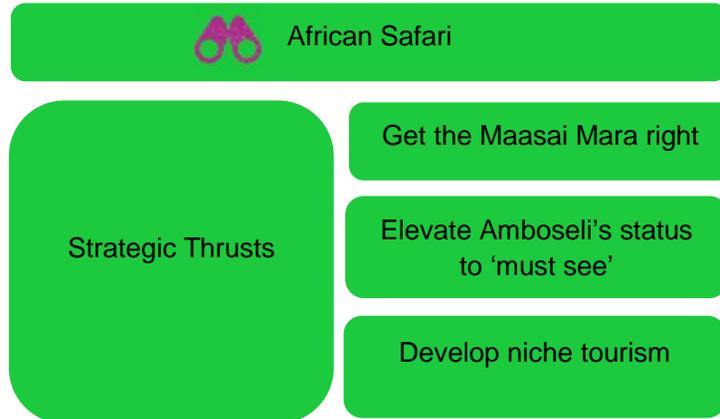


Experience	Priority Regions	Strategic Thrusts
 Business Tourism	<ul style="list-style-type: none"> Nairobi 	<ul style="list-style-type: none"> Business tourism strategy Refresh and revamp existing key facilities
All experiences	<ul style="list-style-type: none"> All regions 	<ul style="list-style-type: none"> Events strategy Quality experiences and service excellence Promote community-based tourism Promote responsible tourism (sustainability)

Each of the strategic thrusts above have been expanded to include relevant strategic actions that need to be undertaken for each tourism experience – these relate to the upgrading and development of tourism resources and activities. The strategic thrusts and actions are presented in the sections which follow.



3.7.2 Strategic Thrusts & Strategic Actions to Improve the Existing Core Experiences & Core Regions



Strategic Thrusts	Strategic Actions Tourism Resources & Activities Upgrading & Development	Priority Areas/Nodes
Get the Masai Mara right	1. Formulate a detailed tourism development strategy for the Maasai Mara which must include: <ol style="list-style-type: none"> Policy on vehicle types/standards permitted to access the reserve Setting of vehicle capacity limits during various seasons of the year (entrance quotas and game sighting quotas) Policy on infringement of reserve rules and regulations with setting of clear penalties for non-compliance Sustainability Strategy Human-wildlife Conflict Alleviation Strategy 2. Develop one or more visitor centres at strategic locations to serve as activity hubs (with activity operators and guides), information centres and provide services to visitors (i.e. food	Masai Mara



Strategic Thrusts	Strategic Actions	Priority Areas/Nodes
	<p>Tourism Resources & Activities Upgrading & Development</p> <p>and beverages, shopping such as crafts and basic provisions)</p> <ol style="list-style-type: none"> 3. Improve management of the Maasai Mara (co-ordination, standards and co-operation) 4. Improve the provision of visitor facilities within the reserve such as picnic facilities, bird hides, vulture restaurant etc. 5. Enhance existing activities and introduce new activities in the area, such as game drives, wilderness trails, biking, walking, cultural experiences, special interest tours (e.g. birds, trees, insects), bush meals, star gazing, horse riding, rehabilitation and rescue centre, game tracking, team building etc. 6. Enhance interactions and integration of the Maasai people through interpretation and cultural tourism experiences, e.g. cultural activities such as traditional games and sports, traditional belief systems/practices, story-telling, traditional medicine etc. 7. Develop a visitor information and interpretive strategy and policy (includes directional, information and interpretive signage) 8. Improve the extent and quality of visitor information provided for when in the reserve, e.g. improved visitor guides, additional and better quality maps with suggested routes and travel times 9. Enhance existing and develop new community-based tourism experiences, e.g. home stays, community projects, activities, indigenous nurseries etc. 10. Lobby for the upgrading of the road from Narok to the Maasai Mara – see Infrastructure Strategy 11. Investigate the potential to establish an airport close to the Maasai Mara – see Infrastructure Strategy 	



Strategic Thrusts	Strategic Actions Tourism Resources & Activities Upgrading & Development	Priority Areas/Nodes
	<ul style="list-style-type: none"> 12. Upgrade the entrance gates to the Maasai Mara, including providing decent washrooms, information and visitor services such as food and beverages, fuel and basic banking (ATMs), vehicle hire 13. Conduct a tourism accommodation audit, determine and set capacity limits by type and standard of accommodation for new developments and expansion of existing lodges/camps 14. Identify gaps in the supply of new types and standards of accommodation that may be required and factor into the setting of capacity limits, e.g. camping and self-catering facilities 15. Conduct feasibility studies for the establishment of new accommodation facilities within/outside of the reserve 16. Conduct a benchmarking review of entrance fees and other related visitor charges in comparative/competitive wildlife destinations and develop a pricing strategy for the Maasai Mara 17. Develop and implement programmes to deal with litter clean-up 18. Investigate the potential to establish a transfrontier park with Tanzania and free up visitor movements between the Maasai Mara and the Serengeti 19. Attain World Heritage Status for the Maasai Mara 20. Enhance existing and develop new events – see Events Strategy 	
Elevate Amboseli's status to 'must see'	<ul style="list-style-type: none"> 1. Create links to Kilimanjaro by offering activities and tours between Amboseli and Kilimanjaro 2. Enhance existing activities and introduce new activities into the area, such as wilderness trails, walking, special interest tours (e.g. birds, trees, insects etc.), bush meals, star gazing, local community visits etc. 3. Develop a visitor information and interpretive strategy and policy (includes directional, 	Amboseli



Strategic Thrusts	Strategic Actions	Priority Areas/Nodes
	<p>Tourism Resources & Activities Upgrading & Development</p> <p>information and interpretive signage)</p> <p>4. Enhance existing and develop new events – see Events Strategy</p>	
Develop niche tourism	<p>1. Enhance existing and develop new niche tourism products, including:</p> <ul style="list-style-type: none"> a. Avitourism (Birding) b. Photography c. Voluntourism (Communities and wildlife/nature conservation) d. Flora e. Entomology f. Scientific research g. Film 	Maasai Mara Amboseli





Strategic Thrusts	Strategic Actions Tourism Resources & Activities Upgrading & Development	Priority Areas/Nodes
Refresh and revamp tired beach products	<ol style="list-style-type: none"> 1. Upgrade/refurbish tired beach resorts (use the Refurbishment Fund) 2. Develop activity hubs/centres at strategic locations such as tired and unused craft centres/shopping centres (with activity operators and guides), information centres and provide services to visitors (i.e. food and beverages, shopping such as crafts and basic provisions) 	<p>Mombasa</p> <p>Diani</p> <p>Malindi</p> <p>Kilifi</p>
Enhance priority beach nodes	<ol style="list-style-type: none"> 1. Prioritise beach nodes for enhancement 2. Attain Blue Flag beach status for popular beaches that are used by visitors 3. Lobby for alternative access routes to the south of Mombasa in order to avoid the Likoni Ferry – see Infrastructure Strategy 4. Improve / develop facilities within key beach tourism nodes to create a vibey, visitor friendly environment, e.g. eating out, entertainment, recreation 	<p>Mombasa</p> <p>Diani</p> <p>Malindi</p> <p>Kilifi</p>



Strategic Thrusts	Strategic Actions Tourism Resources & Activities Upgrading & Development	Priority Areas/Nodes
	<ol style="list-style-type: none"> 5. Improve / develop facilities at beaches, especially those outside of beach resort areas, e.g. washrooms, arts and crafts, food and beverages etc. 6. Expand beach, water sport and ocean activities, e.g. boat rides, catamaran trips, snorkelling, beach sports (e.g. beach volleyball) etc. 7. Ensure easy access for visitors (especially locals and those not staying at resorts) to public beaches 8. Link the beaches to other tourism facilities and activities through safe and reliable public transport – see Infrastructure Strategy 9. Enhance safety and security at beaches by providing street lighting, tourism police booths, life guards etc. 10. Develop a visitor information and interpretive strategy and policy (includes directional, information and interpretive signage) 11. Conduct a benchmarking review of entrance fees and other related visitor charges in comparative/competitive beach destinations and develop a pricing strategy for the marine reserves 12. Develop and implement programmes to deal with litter clean-up 13. Enhance existing and develop new events – see Events Strategy 	
Develop niche tourism	<ol style="list-style-type: none"> 1. Enhance existing and develop new niche tourism products, including: <ol style="list-style-type: none"> a. Scuba diving b. Scientific research c. Water sports 	Mombasa Diani Malindi Kilifi





Strategic Thrusts	Strategic Actions	Priority Areas/Nodes
	Tourism Resources & Activities Upgrading & Development	
Enhance iconic scenic tourism experiences	<ol style="list-style-type: none"> 1. Develop scenic drives and viewpoints in key scenic areas (especially around Mount Kenya) 2. Develop a visitor information and interpretive strategy and policy (includes directional, information and interpretive signage) 3. Develop and implement programmes to deal with litter clean-up 4. Expand/improve tourism support facilities, such as restaurants, accommodation, tourism shopping and entertainment at key visitor nodes where such is lacking 	Mount Kenya Nanyuki Aberdare Lake region Meru

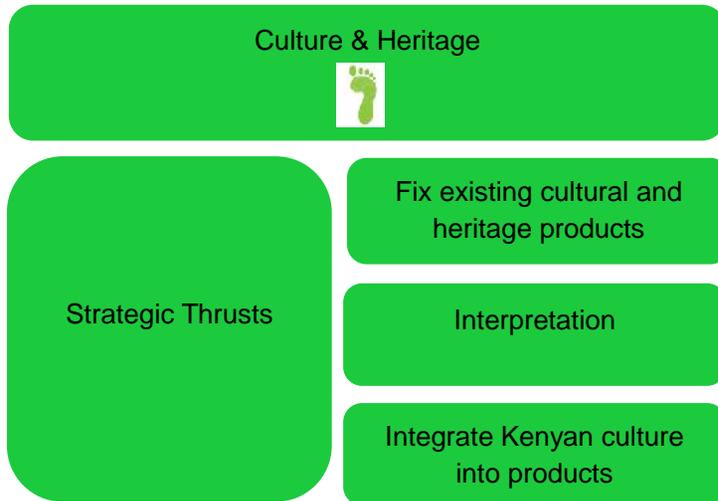


Strategic Thrusts	Strategic Actions Tourism Resources & Activities Upgrading & Development	Priority Areas/Nodes
Develop activities	<ol style="list-style-type: none"> 1. Develop an activity hub at Mount Kenya with nature-based and adventure activities, tourism facilities and services (e.g. visitor information, food and beverages) 2. Enhance existing and develop new activities (with associated facilities), including: <ol style="list-style-type: none"> a. Mountain climbing b. Walking and hiking c. Mountain biking d. Canopy tours e. Equator experiences f. Arts and crafts g. Close animal encounters 3. Identify opportunities for community-based tourism to be developed around wildlife, nature and scenic products 4. Enhance existing and develop new events – see Events Strategy 	Mount Kenya Nanyuki Aberdare Lake region Meru Mount Longonot
Interpretation	<ol style="list-style-type: none"> 1. Develop a visitor information and interpretive strategy and policy (includes directional, information and interpretive signage) 	Mount Kenya Nanyuki Aberdare Lake region Meru Mount Longonot



Strategic Thrusts	Strategic Actions Tourism Resources & Activities Upgrading & Development	Priority Areas/Nodes
Develop niche tourism	1. Enhance existing and develop new niche tourism products, including: <ul style="list-style-type: none"> a. Avitourism (Birding) b. Photography c. Voluntourism (Communities and wildlife/nature conservation) d. Flora e. Entomology f. Scientific research 	Mount Kenya Aberdare Lake region





Strategic Thrusts	Strategic Actions Tourism Resources & Activities Upgrading & Development	Priority Areas/Nodes
Fix existing cultural and heritage products	<ol style="list-style-type: none"> 1. Refresh and revamp Bomas of Kenya to a contemporary, authentic cultural tourism experience 2. Enhance cultural tourism experiences in the Maasai Mara – see African Safari experience 3. Enhance existing home stay products 4. Conduct an inventory assessment of heritage assets and identify existing sites/products that require improvement 5. Refresh and revamp key museums and historical sites 6. Ensure that there is ongoing maintenance and repairs of heritage assets 7. Ensure that heritage impact assessments are undertaken prior to major infrastructure 	Nairobi Maasai Mara Coast

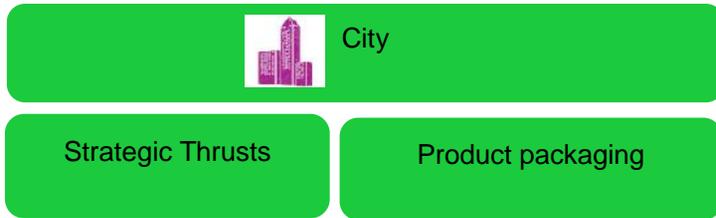


...product strategy

Strategic Thrusts	Strategic Actions	Priority Areas/Nodes
	Tourism Resources & Activities Upgrading & Development development around sites of cultural and/or historical significance 8. Enhance existing and develop new events – see Events Strategy	
Interpretation	1. Develop a visitor information and interpretive strategy and policy (includes directional, information and interpretive signage) 2. Integrate story telling into existing cultural experiences	All core regions
Integrate Kenyan culture into products	1. Promote the development of authentic Kenyan products	All core regions



...product strategy



Strategic Thrusts	Strategic Actions	Priority Areas/Nodes
Product packaging	Tourism Resources & Activities Upgrading & Development 1. Package city experiences incorporating shopping, eating and entertainment products for visitors 2. Enhance existing and develop new events – see Events Strategy	Nairobi



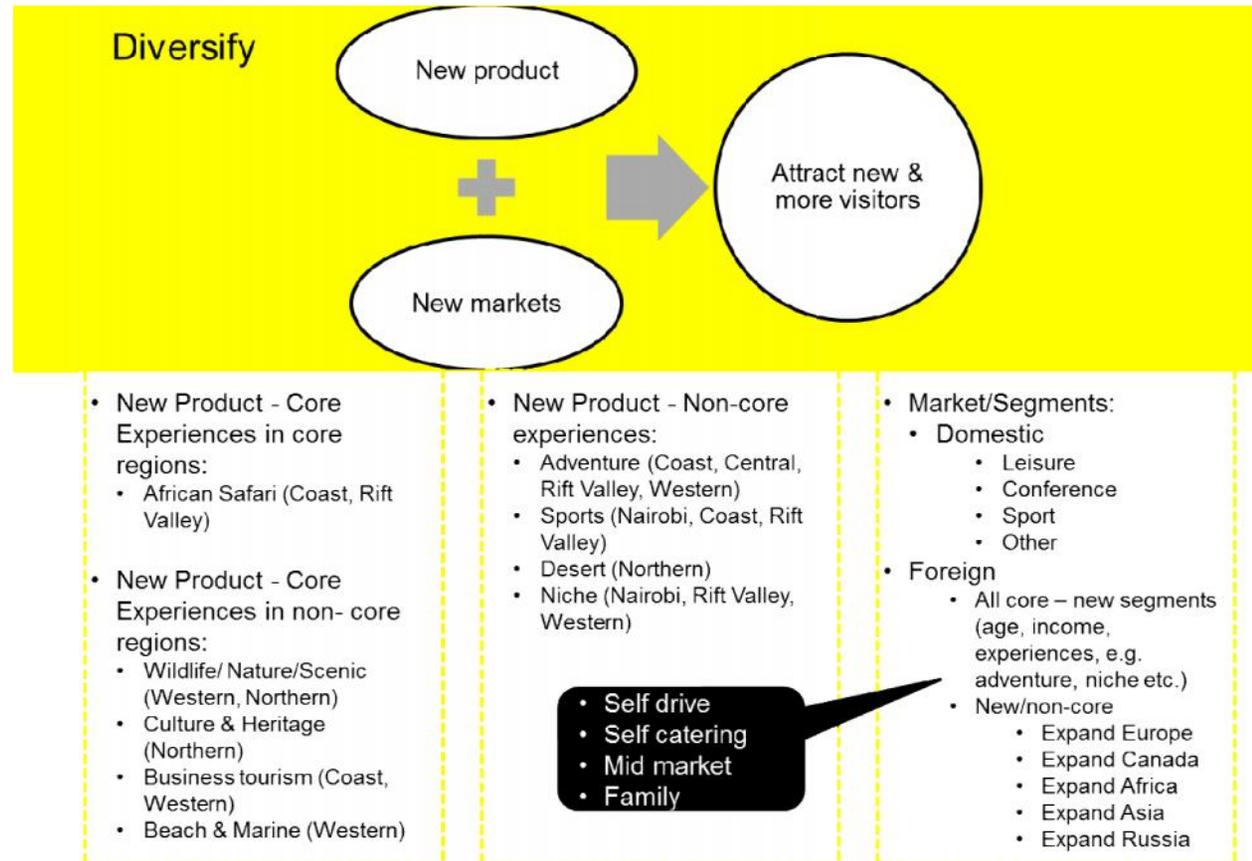


Strategic Thrusts	Strategic Actions Tourism Resources & Activities Upgrading & Development	Priority Areas/Nodes
Business tourism strategy	1. Develop a business tourism strategy for Kenya which should cover: <ul style="list-style-type: none"> a. Identification and prioritisation of types of business tourism events to target b. Identification and prioritisation of source markets c. Funding mechanisms to assist with bidding for international conferences and meetings d. Development of a comprehensive business tourism facilities and services database e. Industry development requirements, e.g. professional conference organisers f. Identification of infrastructure improvements and potential new developments, including pre-feasibility studies g. Budgets h. Marketing strategy 	Nairobi
Refresh and revamp existing key facilities	1. Refurbish the KICC to modernise and update the facilities 2. Identify existing tired conference facilities for upgrades/refurbishments (use the Refurbishment Fund)	Nairobi



3.8 Product Strategy to Diversify Tourism Experiences

The strategic thrusts which follow in this section deal with diversifying the Kenyan tourism product base. Kenya has a diverse range of tourism experiences and regions but the extent of tourism products to support the experiences requires improvement.



3.8.1 Strategy Summary - Diversify

Experience	Priority Regions	Strategic Thrusts
 African Safari	<ul style="list-style-type: none"> Coast Rift Valley 	<ul style="list-style-type: none"> Develop facilities and activities Develop niche tourism
 Beach & Marine	<ul style="list-style-type: none"> Western Coast 	<ul style="list-style-type: none"> Develop beach nodes Develop facilities and activities Develop niche tourism
 Wildlife/Nature/Scenic	<ul style="list-style-type: none"> Western Northern Coast 	<ul style="list-style-type: none"> Develop drawcard products Develop activities Develop niche tourism
 Culture & Heritage	<ul style="list-style-type: none"> Northern Rift Valley Central 	<ul style="list-style-type: none"> Develop drawcard products Interpretation
 Business Tourism	<ul style="list-style-type: none"> Coast Western Nairobi 	<ul style="list-style-type: none"> Develop key new facilities (Mombasa, Bomas of Kenya, Kisumu)
 Adventure	<ul style="list-style-type: none"> Coast Central Rift Valley Western 	<ul style="list-style-type: none"> Develop facilities and activities

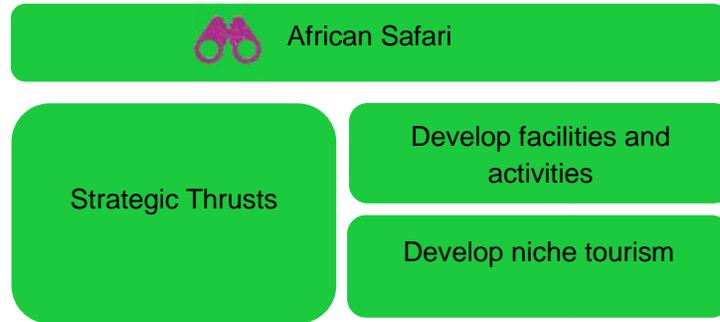


Experience	Priority Regions	Strategic Thrusts
 Sports	<ul style="list-style-type: none"> Nairobi Coast Rift Valley Western 	<ul style="list-style-type: none"> Develop drawcard products Develop activities
 Desert	<ul style="list-style-type: none"> Northern 	<ul style="list-style-type: none"> Develop drawcard products Develop activities
 Niche	<ul style="list-style-type: none"> Nairobi Rift Valley Western 	<ul style="list-style-type: none"> Health and wellness tourism strategy Agri-tourism strategy Medical tourism strategy
All experiences	<ul style="list-style-type: none"> All regions 	<ul style="list-style-type: none"> Events strategy Quality experiences and service excellence Promote community-based tourism Promote responsible tourism (sustainability)

The strategic thrusts and actions to diversify the Kenyan tourism product base are presented in the sections which follow.



3.8.2 Strategic Thrusts & Strategic Actions to Diversify Experiences



Strategic Thrusts	Strategic Actions Tourism Resources & Activities Upgrading & Development	Priority Areas/Nodes
Develop facilities and activities	<ol style="list-style-type: none"> 1. Diversify the accommodation base in national reserves/parks and conservation/protected areas, e.g. self-catering, expand and upgrade camping facilities 2. Develop one or more visitor centres at strategic locations to serve as activity hubs (with activity operators and guides), information centres and provide services to visitors (i.e. food and beverages, shopping such as crafts and basic provisions) <ol style="list-style-type: none"> a. Include interpretation and story-telling at the visitor centre related to the lion 'man-eaters' of Tsavo, history of the railway etc. 3. Improve the provision of visitor facilities within reserves such as picnic facilities, bird hides etc. 4. Enhance existing activities and introduce new activities in reserves, such as game drives, biking, walking, cultural experiences, special interest tours (e.g. birds, trees, insects), etc. 5. Develop a visitor information and interpretive strategy and policy (includes directional, 	Tsavo National Parks Shimba Hills Conservancies such as Lewa



Strategic Thrusts	Strategic Actions	Priority Areas/Nodes
	<p>Tourism Resources & Activities Upgrading & Development</p> <p>information and interpretive signage)</p> <p>6. Improve the extent and quality of visitor information provided for when in the reserves, e.g. improved visitor guides, additional and better quality maps with suggested routes and travel times</p> <p>7. Enhance existing and develop new community-based tourism experiences, e.g. home stays, community projects, activities, indigenous nurseries etc.</p> <p>8. Enhance existing and develop new events – see Events Strategy</p>	
Develop niche tourism	<p>1. Enhance existing and develop new niche tourism products, including:</p> <ul style="list-style-type: none"> a. Avitourism (Birding) b. Photography c. Voluntourism (Communities and wildlife/nature conservation) d. Flora e. Entomology f. Scientific research 	<p>Tsavo National Parks</p> <p>Shimba Hills</p> <p>Conservancies such as</p> <p>Lewa</p>



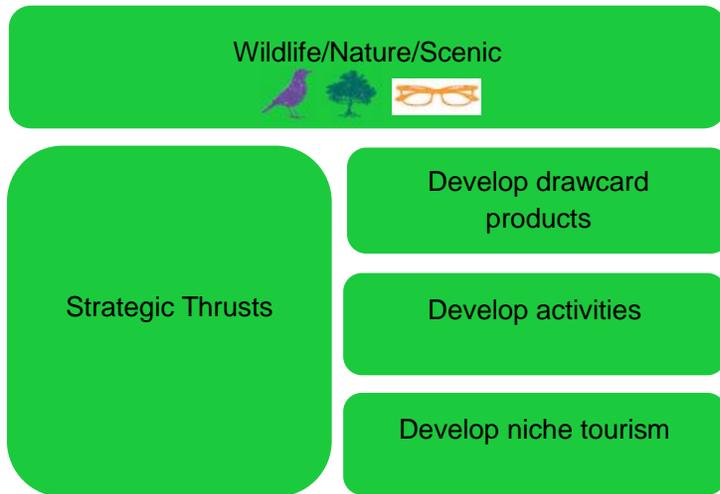


Strategic Thrusts	Strategic Actions Tourism Resources & Activities Upgrading & Development	Priority Areas/Nodes
Develop beach nodes	<ol style="list-style-type: none"> 1. Further develop and implement a Kenyan branded coastal destination 2. Establish Lamu as an authentic cultural beach node by: <ol style="list-style-type: none"> a. Leveraging its World Heritage status, e.g. development of a visitor interpretive centre, marketing etc. b. Enhancing beach and cultural-related activities c. Diversifying the accommodation base d. Addressing safety and security concerns 3. Establish Gazi as a beach tourism node by: <ol style="list-style-type: none"> a. Enhancing beach and water related activities b. Diversifying the accommodation base c. Providing shopping, eating out and entertainment facilities 	Mombasa Diani Kilifi Malindi Lamu Gazi



Strategic Thrusts	Strategic Actions Tourism Resources & Activities Upgrading & Development	Priority Areas/Nodes
Develop facilities and activities	<ol style="list-style-type: none"> 1. Conduct a tourism accommodation audit, determine and set capacity limits by type and standard of accommodation for new developments 2. Identify gaps in the supply of new types and standards of accommodation that may be required, e.g. self-catering and timeshare facilities 3. Conduct feasibility studies for the establishment of new accommodation facilities 4. Enhance existing and develop new activities at beach nodes and marine parks and reserves, such as: <ol style="list-style-type: none"> a. Beach sports b. Water sports c. Recreation facilities d. Washrooms e. Shopping, entertainment and eating out 5. Develop a visitor information and interpretive strategy and policy (includes directional, information and interpretive signage) 6. Enhance existing and develop new events – see Events Strategy 	Lamu Gazi Marine parks and reserves
Develop niche tourism	<ol style="list-style-type: none"> 1. Enhance existing and develop new niche tourism products, including: <ol style="list-style-type: none"> a. Scuba diving b. Water sports c. Cruise tourism (ocean cruises on the East Coast and river cruises at Lake Victoria) d. Fishing 	Lake Victoria Mombasa Lamu Gazi



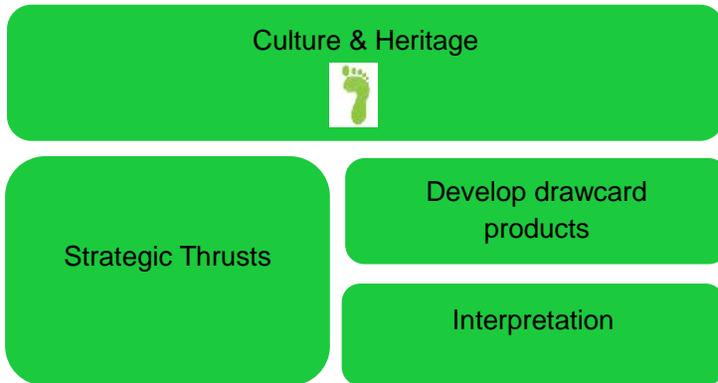


Strategic Thrusts	Strategic Actions Tourism Resources & Activities Upgrading & Development	Priority Areas/Nodes
Develop drawcard products	<ol style="list-style-type: none"> 1. Conduct feasibility studies for the development of drawcard tourism products and implement the viable projects, i.e.: <ol style="list-style-type: none"> a. Lakeside resorts b. Visitor interpretive centres linked to culture and heritage, e.g. Lake Turkana Cradle of Mankind visitor attractions c. Hanging path/forest canopy trail at Kakamega Forest 	Lake Turkana Lake Victoria Samburu Mijikenda Kaya Forests Kakamega Forest
Develop activities	<ol style="list-style-type: none"> 1. Enhance existing and develop new wildlife/nature activities around Lake Victoria and Lake Turkana such as walking trails, glass bottom boat rides, birding, fishing etc. 2. Link wildlife/nature-based activities at Lake Victoria and Lake Turkana to cultural tourism 	Lake Turkana Lake Victoria Samburu



Strategic Thrusts	Strategic Actions Tourism Resources & Activities Upgrading & Development	Priority Areas/Nodes
	<p>experiences, e.g. Tilapia catch and eat experience, traditions, myths and legends associated with the lakes and local cultures etc.</p> <ol style="list-style-type: none"> 3. Enhance existing and develop new wildlife/nature activities at Samburu and the Mijikenda Kaya Forests such as game drives, wildlife tracking, photography etc. 4. Link wildlife/nature-based activities at the Mijikenda Kaya Forests to cultural tourism experiences, e.g. traditional belief systems etc. 5. Better leverage the World Heritage Status of the Mijikenda Kaya Forests 6. Develop scenic routes with visitor stops and interpretation in priority areas 7. Enhance existing and develop new events – see Events Strategy 	Mijikenda Kaya Forests
Develop niche tourism	<ol style="list-style-type: none"> 1. Enhance existing and develop new niche tourism products, including: <ol style="list-style-type: none"> a. Avitourism (Birding) b. Photography c. Voluntourism (Communities and wildlife/nature conservation) d. Flora e. Entomology 	Lake Turkana Lake Victoria Samburu Mijikenda Kaya Forests





Strategic Thrusts	Strategic Actions Tourism Resources & Activities Upgrading & Development	Priority Areas/Nodes
Develop drawcard products	<ol style="list-style-type: none"> 1. Conduct feasibility studies for the development of drawcard tourism products and implement the viable projects, i.e.: <ol style="list-style-type: none"> a. Visitor interpretive centres, e.g. Lake Turkana Cradle of Mankind visitor attractions, Mau Mau Caves b. Cultural tourism experiences, including living museums, arts and crafts, e.g. Thingira Cultural Village c. Soapstone carving attraction in Kisii 2. Enhance existing and develop new events – see Events Strategy 3. Develop a Creative Industries Strategy 	Lake Turkana Nanyuki Mount Kenya Kisii County Mijikenda Kaya Forests
Interpretation	<ol style="list-style-type: none"> 1. Develop a visitor information and interpretive strategy and policy (includes directional, information and interpretive signage) 	Northern region Rift Valley region Central region



...product strategy



Business Tourism

Strategic Thrusts

Develop new facilities

Strategic Thrusts	Strategic Actions	Priority Areas/Nodes
	Tourism Resources & Activities Upgrading & Development	
Develop new facilities	1. Conduct feasibility studies for the development of new conference and meeting facilities and implement the viable projects	Mombasa Kisumu Nairobi





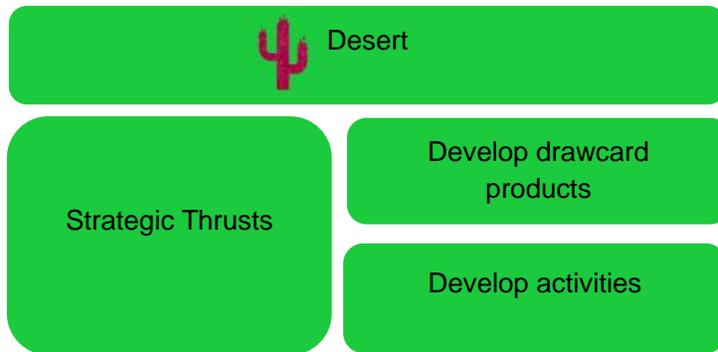
Strategic Thrusts	Strategic Actions Tourism Resources & Activities Upgrading & Development	Priority Areas/Nodes
Develop facilities and activities	<ol style="list-style-type: none"> 1. Investigate the potential to develop adventure tourism resorts near Mount Kenya and around Lake Victoria 2. Enhance existing adventure activities and expand the types of activities offered at key nodes, e.g. through activity centres, to include: <ol style="list-style-type: none"> a. Mountain/rock climbing b. Hiking c. Mountain biking d. Slackpacking e. River rafting f. Zip lining/bridge swings/bungee jumping g. Scuba diving 3. Develop community-based tourism opportunities related to adventure tourism 4. Enhance existing and develop new events – see Events Strategy 	Mount Kenya Lake Victoria Coast region Mount Longonot





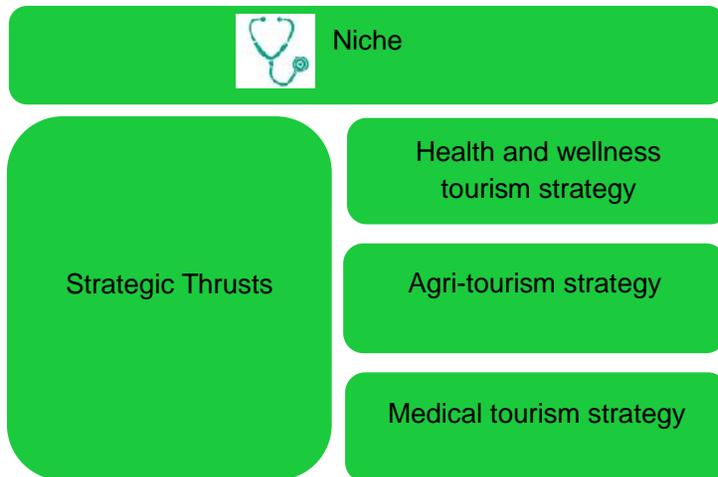
Strategic Thrusts	Strategic Actions Tourism Resources & Activities Upgrading & Development	Priority Areas/Nodes
Develop drawcard products	<ol style="list-style-type: none"> 1. Investigate the potential to develop high performance training academies in the athletics field 2. Link to adventure tourism activities – see Adventure Tourism Strategy 3. Enhance and package golf tourism experiences 4. Upgrade major sports facilities such as stadia 5. Enhance and package scuba diving experiences 6. Enhance existing and develop new events – see Events Strategy 	Iten Nairobi Diani Malindi Kilifi Lake Victoria
Develop activities	<ol style="list-style-type: none"> 1. Identify community-based tourism opportunities related to sports that can be developed as tourism products, e.g. traditional sports and games, camel trails etc. 2. Offer activity packages to make use of local facilities such as sports fields 	Iten Nairobi Diani Malindi Kilifi Lake Victoria





Strategic Thrusts	Tourism Resources & Activities Upgrading & Development	Priority Areas/Nodes
Develop drawcard products	1. Develop a Lake Turkana Cradle of Mankind visitor attraction	Lake Turkana
Develop activities	1. Enhance existing and develop new activities, e.g. camel trails, activities linked to culture and heritage, niche tourism such as desert flora, arts and crafts etc. 2. Develop activities at museums and heritage sites 3. Enhance existing and develop new events – see Events Strategy 4. Develop scenic trails with stop-off points	Lake Turkana Samburu Marsabit National Park





Strategic Thrusts	Tourism Resources & Activities Upgrading & Development	Priority Areas/Nodes
Health and wellness tourism strategy	<ol style="list-style-type: none"> 1. Conduct research on the latest trends in health and wellness tourism to identify potential markets for this experience (international and domestic) 2. Identify existing natural resources that can form part of the health and wellness tourism experience offering, e.g. hot springs, natural forests etc. 3. Link to culture and heritage by developing tourism products linked to traditional healing, use of natural medicines etc. 4. Conduct feasibility studies for the development of health and wellness products, e.g. health spas, resorts or spas at hot springs etc. 5. Develop a marketing strategy 6. Enhance existing and develop new events – see Events Strategy 	Hell's Gate Loburu



...product strategy

Strategic Thrusts	Tourism Resources & Activities Upgrading & Development	Priority Areas/Nodes
Agri-tourism strategy	<ol style="list-style-type: none">1. Review and refine the existing agro-tourism strategy to include:2. Enhance existing and develop new events – see Events Strategy	Rift Valley Western
Medical tourism strategy	<ol style="list-style-type: none">1. Conduct research on the latest trends in medical tourism to identify potential markets for this experience (international and domestic)2. Identify medical facilities to be promoted for medical tourism purposes3. Work with identified medical facilities to package and promote the facilities and procedures4. Develop a marketing strategy	Nairobi



3.9 Product Strategy Strategic Thrusts Relevant to All Regions and All Experiences



Strategic Thrusts	Strategic Actions
Events strategy	<ol style="list-style-type: none"> 1. Compile a database of tourism-related events taking place across Kenya 2. Classify events by type and significance (i.e. international, regional, national, local and community) 3. Identify existing events with potential to grow in significance and develop strategies to achieve growth 4. Improve the geographic spread of events 5. Improve the spread of events during the year 6. Create signature events 7. Identify important sporting codes that are already established in Kenya and bring World Championship events to Kenya,



Strategic Thrusts	Strategic Actions
	<p>e.g. athletics</p> <p>8. Develop an events policy (classification of events, funding mechanisms, support that can be provided at national and county level etc.)</p>
Quality experiences and service excellence	<ol style="list-style-type: none"> 1. Ensure compliance with tourism grading legislation 2. Monitor customer feedback on the quality of tourism products in Kenya and develop mechanisms to address negative feedback 3. Develop and implement a tourism industry awards programme for facilities, services and people in the tourism industry 4. Develop and implement a tourism service excellence training programme 5. Develop and implement a mystery guest programme 6. Implement the refurbishment fund to address product quality issues 7. Ensure that people in tourism are passionate and adequately trained/skilled to work in the industry – see HR Strategy
Promote community-based tourism	<ol style="list-style-type: none"> 1. Conduct an audit of existing community-based tourism projects to identify challenges and support requirements 2. Encourage the development of quality home stay products 3. Provide training for local communities on the tourism industry – see HR Strategy 4. Link community-based tourism projects to voluntourism packages 5. Develop and implement a mentorship/coaching programme to match industry experts with community-based tourism projects 6. Identify barriers to entry and develop mechanisms to address challenges, e.g. skills, funding etc.
Promote responsible tourism (sustainability)	<ol style="list-style-type: none"> 1. Encourage tourism products to join eco-accreditation programmes, e.g. Ecotourism Kenya certification programme 2. Assess current status of government owned or managed tourism assets and develop a Responsible Tourism Improvement Plan 3. Create visitor awareness of responsible behaviour in communities and the environment



Strategic Thrusts	Strategic Actions
	<ol style="list-style-type: none"> 4. Facilitate awareness and capacity-building on responsible tourism for government tourism officials and tourism marketing organisations 5. Provide support (e.g. training, information sources) to tourism businesses and communities to enable implementation of responsible tourism practices 6. Embed Responsible Tourism messaging in marketing activities 7. Develop national minimum standards for responsible tourism

3.10 Prioritising the Product Strategy Strategic Thrusts

The collective strategic thrusts presented earlier in the product strategy have been prioritised based on a combination of the market-product readiness of the relevant tourism product experience and rating the likely impact of the strategic thrusts on visitor demand. The rating of product market readiness and likely impact on visitor demand have been scored as follows:

Product Market Readiness – Score out of 5	Likely Impact on Visitor Demand – Score out of 3
Excellent = 5/5	High = 3/3
Very good = 4/5	Medium = 2/3
Average = 3/5	Low = 1/3
Low = 2/5	
Very low = 1/5	

The priority ratings are provided on a scale of 1-3 as follows:

-  = High priority (7 or 8/8)
  = Medium priority (5 or 6/8)
  = Low priority (4 or less/8)



3.10.1 Prioritisation of Product Strategy Strategic Thrusts to Improve the Existing Tourism Experiences

Experience	Strategic Thrusts	Product Market Readiness	Rating of Likely Impact on Visitor Demand	Combined Score Out of 8	Priority Rating
 African Safari	<ul style="list-style-type: none"> • Get the Masai Mara right • Elevate Amboseli's status to 'must see' • Develop niche tourism 	EXCELLENT = 5/5	HIGH = 3/3	8	
 Beach & Marine	<ul style="list-style-type: none"> • Refresh and revamp tired beach products • Enhance priority beach nodes • Develop niche tourism 	VERY GOOD = 4/5	HIGH = 3/3	7	
 Wildlife/Nature/Scenic	<ul style="list-style-type: none"> • Enhance iconic scenic tourism experiences • Develop activities • Interpretation • Develop niche tourism 	VERY GOOD = 4/5	HIGH = 3/3	7	
 Culture & Heritage	<ul style="list-style-type: none"> • Fix existing cultural and heritage products • Interpretation • Integrate Kenyan culture into products 	VERY GOOD = 4/5	MEDIUM = 2/3	6	
 City	<ul style="list-style-type: none"> • Product packaging 	VERY GOOD = 4/5	HIGH = 2/3	6	



Experience	Strategic Thrusts	Product Market Readiness	Rating of Likely Impact on Visitor Demand	Combined Score Out of 8	Priority Rating
 Business	<ul style="list-style-type: none"> Business tourism strategy Refresh and revamp existing key facilities 	AVERAGE = 3/5	HIGH = 3/3	6	
All experiences	<ul style="list-style-type: none"> Events strategy Quality experiences and service excellence Promote community-based tourism Promote responsible tourism (sustainability) 	Not applicable			

3.10.2 Prioritisation of Product Strategy Strategic Thrusts to Diversify the Tourism Experiences

The same approach has been used to prioritise the strategic thrusts for the Diversify Strategy:

Experience	Strategic Thrusts	Product Market Readiness	Rating of Likely Impact on Visitor Demand	Combined Score Out of 8	Priority Rating
 African Safari	<ul style="list-style-type: none"> Develop facilities and activities Develop niche tourism 	EXCELLENT = 5/5	HIGH = 3/3	8	



Experience	Strategic Thrusts	Product Market Readiness	Rating of Likely Impact on Visitor Demand	Combined Score Out of 8	Priority Rating
 <p>Beach & Marine</p>	<ul style="list-style-type: none"> • Develop beach nodes • Develop facilities and activities • Develop niche tourism 	VERY GOOD = 4/5	HIGH = 3/3	7	
 <p>Wildlife/Nature/Scenic</p>	<ul style="list-style-type: none"> • Develop drawcard products • Develop activities • Develop niche tourism 	VERY GOOD = 4/5	HIGH = 3/3	7	
 <p>Culture & Heritage</p>	<ul style="list-style-type: none"> • Develop drawcard products • Interpretation 	AVERAGE = 3/5	MEDIUM = 2/3	5	
 <p>Business Tourism</p>	<ul style="list-style-type: none"> • Develop key new facilities 	VERY GOOD = 4/5	HIGH = 3/3	7	
 <p>Adventure</p>	<ul style="list-style-type: none"> • Develop facilities and activities 	AVERAGE = 3/5	MEDIUM = 2/3	5	
 <p>Sports</p>	<ul style="list-style-type: none"> • Develop drawcard products • Develop activities 	AVERAGE = 3/5	MEDIUM = 2/3	5	



Experience	Strategic Thrusts	Product Market Readiness	Rating of Likely Impact on Visitor Demand	Combined Score Out of 8	Priority Rating
 Desert	<ul style="list-style-type: none"> Develop drawcard products Develop activities 	LOW = 2/5	LOW = 1/3	3	
 Niche	<ul style="list-style-type: none"> Health and wellness tourism strategy Agri-tourism strategy Medical tourism strategy 	AVERAGE = 3/5	LOW = 1/3	4	
All experiences	<ul style="list-style-type: none"> Events strategy Quality experiences and service excellence Promote community-based tourism Promote responsible tourism (sustainability) 	Not applicable			

Based on the above prioritisation approach, the following tourism experiences and strategic thrusts form the primary focus of implementation, viz:

Experience	Priority No 1 Improve Existing	Priority No 2 Diversify
 African Safari	<ul style="list-style-type: none"> Get the Masai Mara right Elevate Amboseli's status to 'must see' Develop niche tourism 	<ul style="list-style-type: none"> Develop facilities and activities Develop niche tourism



Experience	Priority No 1 Improve Existing	Priority No 2 Diversify
 <p>Beach & Marine</p>	<ul style="list-style-type: none"> • Refresh and revamp tired beach products • Enhance priority beach nodes • Develop niche tourism 	<ul style="list-style-type: none"> • Develop beach nodes • Develop facilities and activities • Develop niche tourism
 <p>Wildlife/Nature/Scenic</p>	<ul style="list-style-type: none"> • Enhance iconic scenic tourism experiences • Develop activities • Interpretation • Develop niche tourism 	<ul style="list-style-type: none"> • Develop drawcard products • Develop activities • Develop niche tourism
 <p>Business Tourism</p>	<ul style="list-style-type: none"> • Business tourism strategy • Refresh and revamp existing key facilities 	<ul style="list-style-type: none"> • Develop key new facilities
<p>All experiences</p>	<ul style="list-style-type: none"> • Events strategy • Quality experiences and service excellence • Promote community-based tourism • Promote responsible tourism (sustainability) 	



SECTION 4



Infrastructure Strategy



National Tourism Blueprint 2030

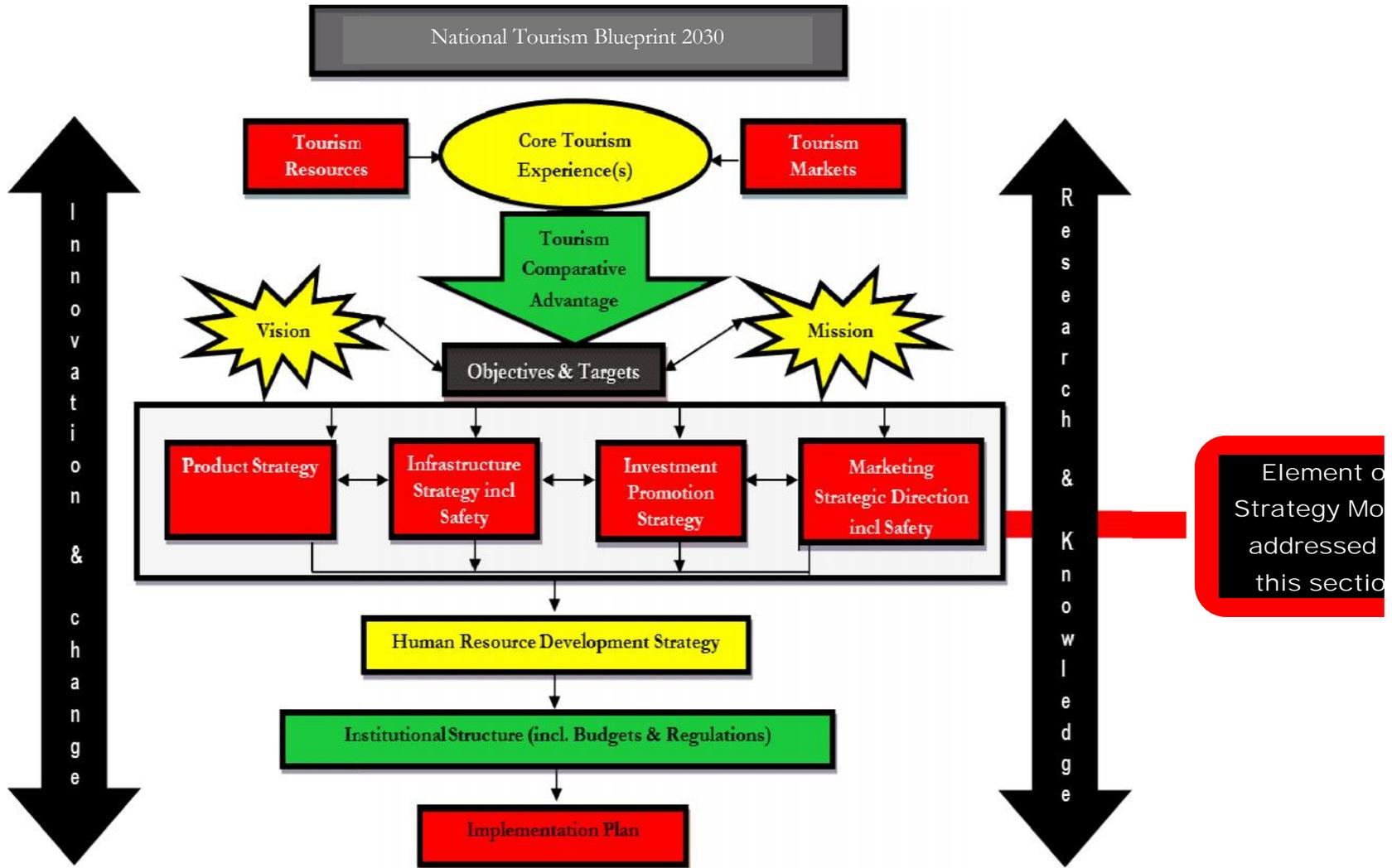
Infrastructure Strategy

September 2017

Section 4
Detailed Strategy
Infrastructure Strategy

Overview
Preliminaries
1. Introduction & Approach
2. Innovation and Change & Strategic Direction
3. Detailed Strategy – Product Strategy
4. Detailed Strategy – Infrastructure Strategy
5. Detailed Strategy – Investment Promotion Strategy
6. Detailed Strategy – Marketing Strategic Direction
7. Detailed Strategy – Human Resource Strategy
8. Detailed Strategy – Research and Knowledge Management Strategy
9. Detailed Strategy – Institutional Structure

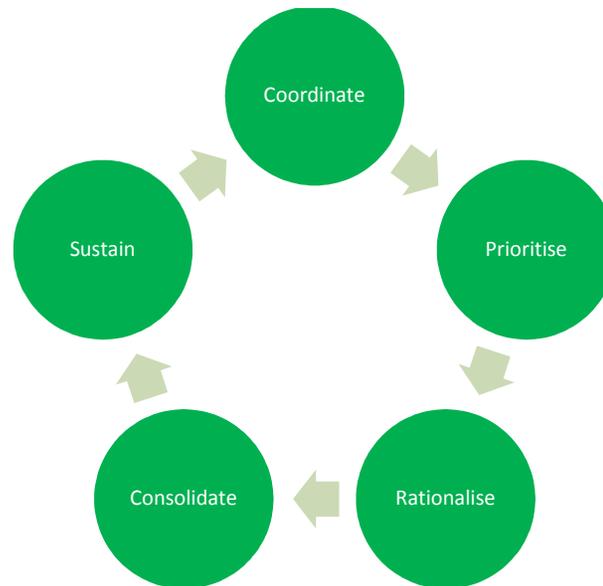




4. Infrastructure Strategy

4.1 Principles: Tourism Infrastructure Investment in Kenya

As with most infrastructural challenges, 'what needs to be done' is often self-evident, but allocation of priorities and budgets and the implementation of project execution strategies are often determined by ruling procurement processes, supply chain complexities and funding limitations. In execution of the Tourism Strategic Blueprint, it will be critical that the Infrastructure Strategy is aligned to the Product and Marketing Strategies it supports. To achieve this alignment, the process illustrated below may be of some assistance in clarifying the decision-making sequences:



Co-Ordinate

Decision-making structures affecting tourism infrastructure should obviously include tourism industry and relevant infrastructure partners, especially roads agencies (KENHA and KURA), the KAA, Public Transport Operators and associated en-route support providers. In relation to Security-related infrastructure and systems, it will also be important to set-up updated structures with, for example, the Ministry of Defence where information/intelligence obtained through classified and/or secret programmes and technologies is screened, declassified and shared with industry stakeholders when rapid responses or actions are required to enhance the safety and security of tourism stakeholders.

Prioritise

While there are many infrastructure upgrade initiatives on the drawing boards across multiple sectors, priorities of those affecting tourism need still to be formally determined to ensure 'best value for money'. There is also a need to distinguish between tourism-driven projects and other National development or County projects that have different drivers, or where the 'value' (socio-economic benefit) may be differently understood or interpreted.

Rationalise

There is also a sense that there is a proliferation of tourism sector infrastructure-upgrade projects in the IDPs of many Counties, where current markets are too thin to sustain them. Therefore, prioritisation and rationalisation of these projects, especially in the early years of the plan, may have a better chance of consolidating added value. The advocated approach is thus parallel to that in the Tourism Strategic Blueprint itself, where 'Improve Existing' takes precedence over 'Diversify'. Another area where rationalisation might be necessary is in airport infrastructure, where there may be too many 'airport' projects under consideration to be sustained by tourism growth alone or funded by available budget. For example, it is unlikely that the airports at Nanyuki, Nyeri and Isiolo will all be independently sustainable without some form of subsidy and/or rationalisation of investment and operations, since they are very close to each other.

Consolidate



...infrastructure strategy

An 'improve existing' approach will ensure that existing successes are reinforced and consolidated. For example, JKIA is the region's most successful airport and it is important to enhance and build on this through (especially) additional landside upgrades that enhance multi-modal transfer capability and create improved levels of service/capacity through facilitating access to latest generation transport technologies. Similarly, Wilson Airport is probably Africa's leading General Aviation ("GA") airport, and has a unique opportunity to innovate and modernise to new standards of general aviation operator and non-scheduled passenger support.

Sustain

Sustainability is a critical issue in respect of infrastructure, especially where, as in Kenya, there are multiple infrastructure projects simultaneously in hand, which will inevitably affect modal split and future demand patterns. For example, further attention may need to be paid to the sustainability of the CASSOA air 'tourism circuit' initiative as road connectivity within Kenya and the EAC improves.

4.2 Alignment of Infrastructure Priorities with Kenya's Core Tourism Product Experiences

Kenya's **core** tourism product experiences have been identified in the Product Strategy as:



<u>Experience</u>	<u>Regions with strongest offerings</u>
 Beach & marine	Coast
 African safari	Masai Mara & Amboseli
 Wildlife	Rift Valley, Central & Western
 Nature	Rift Valley, Western & Masai Mara/Amboseli
 Scenic	Central & Northern
 Culture & heritage	Nairobi & Masai Mara/Amboseli
 City	Nairobi
 Business	Nairobi, Coast

The intent of the Infrastructure Strategy is to adopt a parallel approach to that of the Product Strategy, by prioritising the need to **'Improve Existing'** before **'Diversifying'**, but also emphasising the requirement to **'Maintain and Sustain'** in the long term, to avoid similar degradation issues as currently affect much of Kenya's infrastructure.

4.3 Dominant Tourism Transport Patterns in Kenya

4.3.1 International Connectivity

Two critical criteria that drive tourists' choice of transport mode are **'time to destination'** and **'time at destination'**, which are intertwined. Reducing time-to-destination increases time-at-destination and the increased **utility** of longer time-at-destination is generally perceived as more intrinsically valuable (within reason) than the cost differentials in ticket prices that can achieve this. For international travellers, medium haul destinations, as Kenya is for many, are at a significant advantage to long haul destinations in terms of travel time advantage.



...infrastructure strategy

JKIA is the *de facto* aviation hub of the EAC, notwithstanding potential risks to this status in the context of EAC development strategies. While development of potentially competing EAC airports may present a sensitive dilemma for Kenya, as it reconciles its National interests with its commitments as a member of the EAC and representative on cooperative bodies such as CASSOA, the focus is on a **Kenya-specific** strategy.

JKIA's traffic statistics confirm its hub status, with only Addis Ababa, far to the north in Ethiopia, able to compete in terms of scale, at over 6 million passengers per annum. In addition, the relationship between JKIA and Wilson airports as 'symbiotic hubs' for scheduled and GA activities, is possibly unmatched on the continent at present, and represents a unique opportunity for Kenya to **consolidate** its status. But there are potential risks that could threaten Kenya's *de facto* hub status, which will inform the infrastructure strategy and key thrusts to follow. These include:

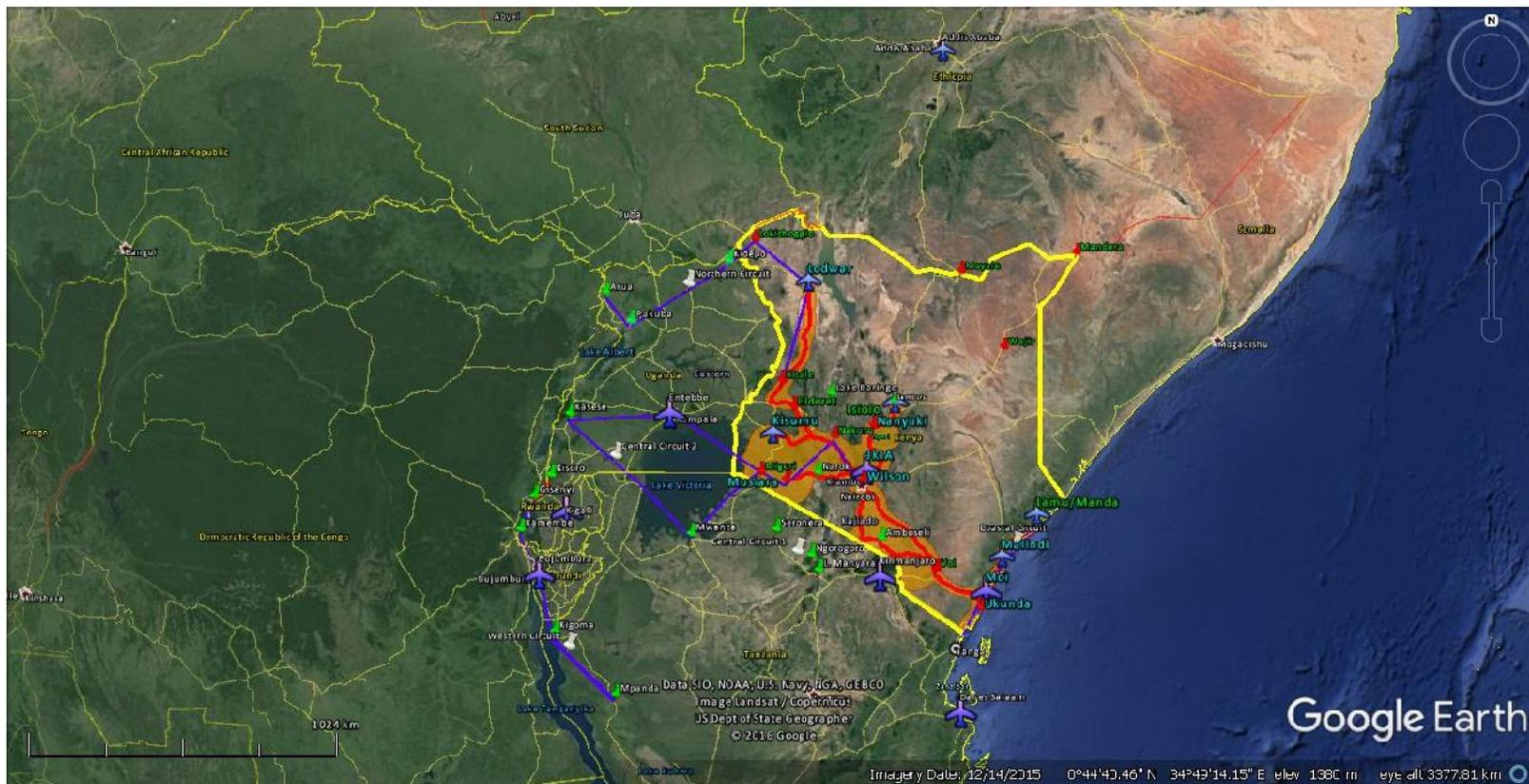
- Initiatives to develop a new Code F airport at Bujumbura, Burundi.
- Expansion plans at Addis Ababa, Ethiopia, Dar es Salaam, Tanzania and Entebbe, Uganda.
- An expanded role for Kilimanjaro IA, Tanzania.
- More advanced BASA's in peer group nations with respect to access to the US market (Ethiopia, for example)

Since there are known deficiencies in the **service delivery chain** at JKIA and Wilson Airports (particularly landside multi-modal transfer arrangements) that could compromise the passenger experience, it is considered that addressing these issues should enjoy priority status as '**improve existing**' initiatives designed to consolidate Kenya's position as a key international regional gateway. Conversely, it is not closely understood how the 5 proposed 'Air Access Circuits' under investigation by CASSOA will align with current Kenyan Core Tourism Experiences. Thus, the degree to which this initiative will complement a Kenya-specific Strategic Blueprint may also need to be examined in more detail.

The figure on the following page illustrates the context of Kenya as a regional hub for international arrivals.



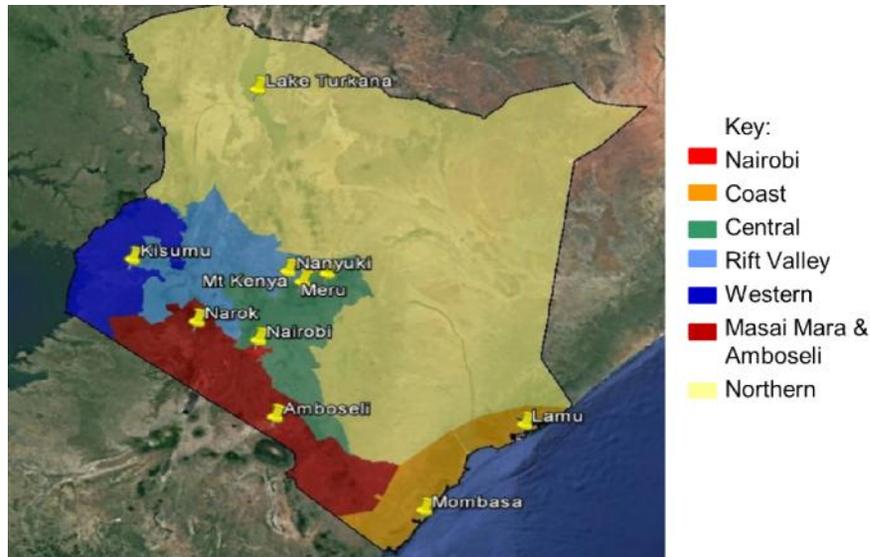
Context: Kenya as a Regional Hub for International Arrivals



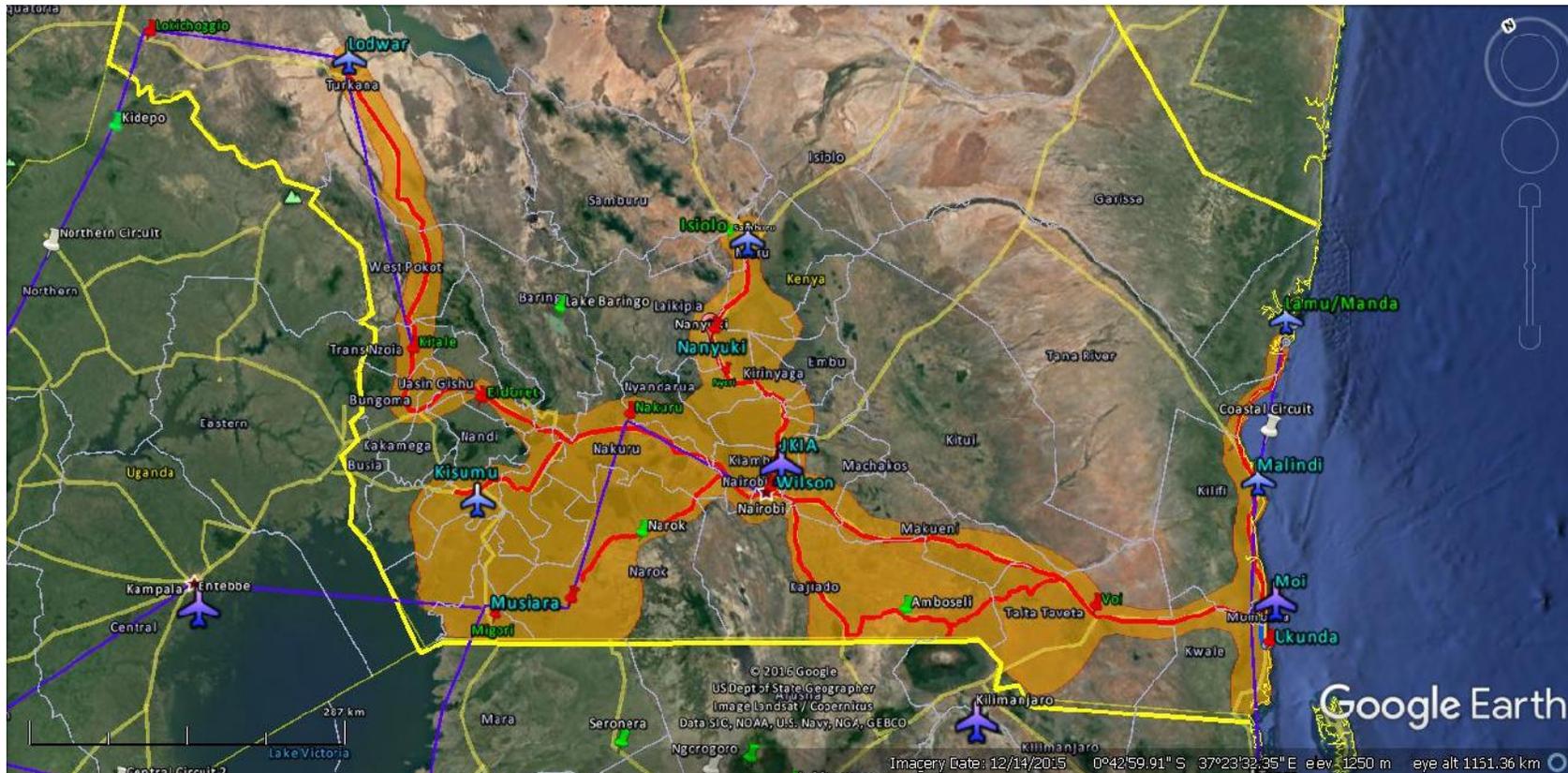
4.3.2 Domestic Air Connectivity

Most Core Tourism Experiences in Kenya are located close to an axis that runs from Diani in the south-east through to Lodwar, with links to the Maasai Mara in the south-west, Kisumu and Lake Victoria in the west and Lake Turkana, Mt Kenya and the East Coast corridor from Diani to Lamu. Links to the LAPSSET corridor are also present at Lamu, Isiolo and Lodwar. The following maps depict the core Tourism Regions, together with associated **tourism mobility corridors** containing road connections and links to significant tourist airports, which provide alternative modal choices. Transfers to water transport modes are also possible at Mombasa and Kisumu.

Map of the tourism regions



Kenya: Mobility Corridors showing Tourism route networks and Key Kenyan Airports



...infrastructure strategy

The key international gateways of JKIA and MIA, plus most airports significant to the Tourism Blueprint, occupy key positions in the centre or at the extremities of some key **tourism mobility corridors**, in a classical **hub-and-spoke** configuration, which is considered critical to the infrastructure strategy to follow. The significant feeder airports include Malindi, Lamu, Isiolo, Lodwar and Kisumu, with Wilson occupying a 'special' position as an auxiliary hub, supporting niche and GA operations from Nairobi. Similarly, a potential dedicated Masai Mara access airport, perhaps at Musiara, will be discussed. Similarly, the future role of Lokichogio as a 'niche tourism' link to the DRC, now that the DRC is an EAC member, will also need to be more carefully analysed and understood in the context of LAPSET, as also the future role of Ukunda, since it is close to Mombasa.

While it is accepted that there are other strategic airports in Kenya such as Mandera, Moyale, Nakuru and Wajir, it is submitted that, from a tourism perspective, these must be lower priority in the short term. Similarly, for existing niche airstrips like Amboseli and Voi, greater value might be achieved by prioritising expenditure on improving road access to these regions, since there are existing feeder airports relatively close by.

The possibility of a dedicated KAA Airport in the Maasai Mara at Musiara (or an alternative site) is a special case that will require further detailed investigation, since the need and desirability of consolidated air access to the region at a single point may show advantages in terms of various operational, security, safety and environmental concerns that threaten the area at present.

4.3.3 Road Network

The map indicates key road routes within the core tourism regions, with links to popular destinations north, west and east. It is important to note that the absolute distances between destinations are not excessive in normal terms and that, subject to well-conceived road improvement strategies along the **mobility corridors** (to be prioritised), travel times between destinations or between key airports and end-destinations can be substantially reduced, in most cases to close to the **golden two hours** standard for International leisure tourists. For example:

- Nairobi to Maasai Mara via Narok: 230 km



- Diani to Nairobi: 250 km
- Mombasa to Malindi: 160 km
- Nairobi to Mombasa: 480 km

By comparison, popular destinations accessed predominantly by road in South Africa and elsewhere are substantially further apart. Assuming, therefore, that ongoing upgrade programmes on both trunk roads and super-highways, as planned by KENHA, KURA and local County Authorities are sustained and travel times on roads appreciably reduced, then popular destinations will become both easily accessible and affordable. This will stimulate intermodal competition and motivate a reduction in the current overreliance on (expensive) air transfers.

4.4 The 'Innovative Investment in Integrated Infrastructure Programme': Principles of the '4IP'

The proposed strategy to support the Tourism Strategic Blueprint is an 'Innovative Investment in Integrated Infrastructure' programme ("4IP"), which rests on the critical pillars of **Innovation** and **Integration** in focussing future infrastructure investment. This approach mirrors that adopted for the Product Strategy, including the critical imperative that **Innovation** is as critical to determining effective investment in new Tourism Infrastructure as it is in revitalising Kenyan tourism, as a whole. Similarly, the **Integration** of previously sectoral approaches to various infrastructural elements will ensure the balanced provision of all infrastructure required to support the Strategic Tourism Blueprint.

The key principles of the **4IP** are illustrated in the figures on the following pages and identify some of the practical challenges that are likely to be encountered. For example, in achieving a balance between Public and Private Sector investment, Public Sector spend will almost always be on infrastructure, thus placing challenges of the fiscus. Without corresponding commitment of the Private Sector to invest in top structures (perhaps through PPP's Concessions or other innovative mechanisms) this balance will remain challenging.



Infrastructure Strategy: Principles

New Tourism Infrastructure Investment must enable Tourism Product Strategy

Strategic Priorities

Improve Existing

Diversify

Maintain and Sustain

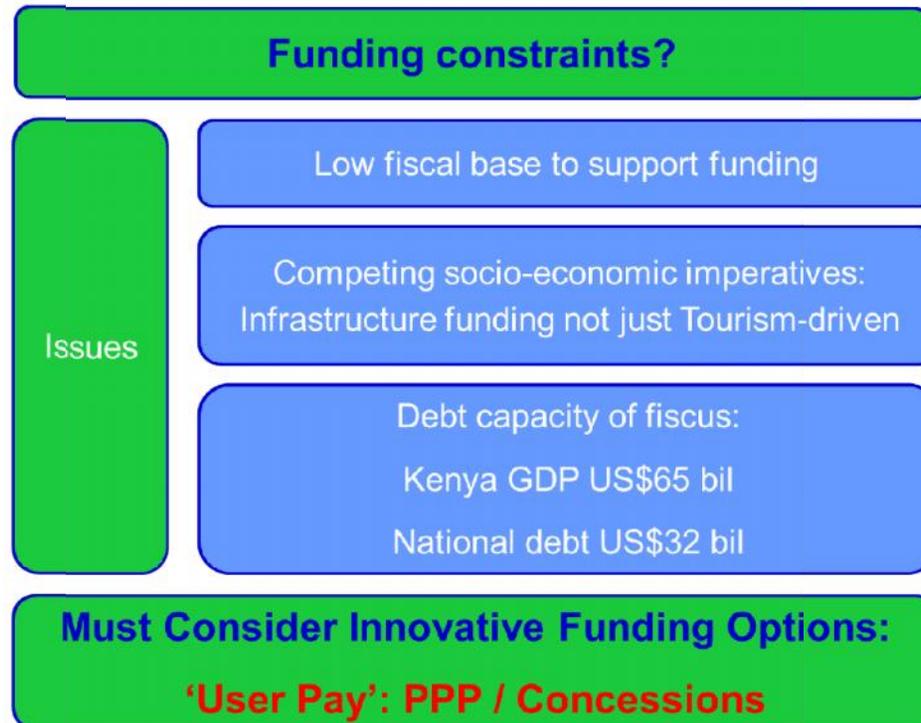
Assume constraints arising from competition for scarce funds from the Fiscus

'Value-for-Money' must be the Test

Balanced Public & Private Sector Investment



Infrastructure Strategy: Principles



4.5 Mobility Corridors as Integrators of innovation

The key intent of the **4IP** is to depart from a traditional 'sectoral' approach to infrastructure investment and to rather adopt a multi-sectoral and integrated approach to the investment in packages of infrastructural interventions within prioritised tourism mobility corridors. The approach thus looks across sectoral boundaries and considers not only traditional modes of transport and modal split, but seeks provide flexibility to in future incorporate new and developing modes of transport and 'disruptive technologies' such as driverless cars (already under development), new-generation 'people mover' systems based on light and heavy rail, 'maglev' and 'vacuum tube' technology, as also known technologies already in commercial use in the aviation sector including RPAS (remote piloted aerial systems – or non-autonomous 'drones') and UAV's (unmanned aerial vehicles or 'autonomous drones') which all have potential future applications in direct and indirect tourism support roles. In this regard, if issues of National Security prevent the widespread sharing of 'drone' technology and deployment in the civilian aviation sector, then detailed protocols should be developed to ensure sharing of intelligence/information relevant to enforcement authorities in the Tourism industry by the Defence Ministry, to order to enhance tourist safety across the board.

A **mobility corridor** is not just a 'road', but a fully integrated system of transport infrastructure and alternative modes, supported by a range of supporting infrastructure, technologies and services including:

- ICT
- Emergency services, law enforcement, Safety and Security SOS, hotlines and en-route contact points
- Service stations, 'oasis' developments and 'truck stops' containing the full range of support facilities
- Public Transport transfer and intermodal facilities
- Food, beverage and general retail services
- Local community interfaces for a variety of services from authentic accommodation to curios, local produce and other support services.



A preliminary high-level segmentation of some key **Mobility Corridors** to match the Product Strategy is included below.

Tourism Infrastructure Strategy

“Concentrate on the Corridors”

Branded Corridors

- The Mombasa Connection
- Coastal Treasure Trove
- Highway to the Sky
- Back to our Roots
- Classic Mara Safari
- The Victorian West
- Southern Safari

Nairobi- Mombasa artery
Diani-Lamu
Nairobi – Nanyuki - Isiolo
Nairobi - L.Turkana
Nairobi - Masai Mara
Nairobi - Kisumu
Nairobi - Amboseli - Tsavo

Vision: A totally integrated tourist-centric route network

Initial Target: 2 400 km of roads



Corridor Strategy Elements

Integration and Coordination

- **Transport Modes**
 - Road
 - Air
- **Safety and Security structures**
- **Roadside assistance, emergency services**
- **Tourism Information systems**
- **Communication and ICT**
- **Infrastructural / support to value-add initiatives**
- **Cultural/Community participation**
- **Connecting the City Centres**

Outcome: A totally integrated tourist-centric route network

Target rollout: 2 400 km of roads

Budget US \$3-4 bil



Integrated Airports, Ports & Stations

- JKIA (International Gateway)
- Wilson (Local NS Hub)
- Moi (Coastal Gateway)
- Kisumu (Victoria Gateway)
- Malindi (N Coast link)
- Ukunda (S Coast Link)
- Isiolo (Mt Kenya Link)
- Musiara/Narok (Mara link)
- Lodwar (Turkana link)

Outcome: A value-managed and integrated multi-modal connectivity network



Value-managed Airport Integration

Components: All Airports

- **Multi Modal Transport Integration**
(PTO terminus, Uber, Car rental, Taxi's)
- **Common/Legible Landside Tourism Support Structure**
(Retail, F&B, ICT, Info Desk, Car rental, Tour Operators)
- **Security/Safety Infrastructure**
(Update infrastructure so that security processes can be integrated into the Service Delivery Chain)
- **Parking/Vehicle management**
(Systems/infrastructure affecting tourist service levels)
- **New Dedicated Masai Mara Airport**

Budget: US\$800 mil



...infrastructure strategy

The preceding figures provide a sense of the infrastructural elements that make up a complete corridor package, emphasising at this stage transportation and security infrastructure and their intermodal integration at key transfer points at the ends of the 'spokes' (mainly airports, but also Mombasa Port and proposed new Kisumu lakeside infrastructure) and, critically, **JKIA and Wilson airports as 'priority hubs'**. An additional element, as illustrated below, will be improved connectivity between key airports and the cities they serve, in order to properly integrate the city tourism experiences, especially in relation to Business Tourism and Conferencing.

Integrating the City Centres

Key Cities

- Nairobi
- Mombasa
- Kisumu

Elements/Objectives

- Multi Modal/PTO Integration – rapid transit termini
- Info Centres and Integration with In-city structures
- Pedestrianisation and creation of walkable precincts
- Health, safety and cleanliness
- Security/Safety Infrastructure

Integrated City Specific Experiences



4.6 4IP Summary – Improve Existing – Summary of Corridor Thrusts

The table summarises the strategic thrusts to support core tourism product experiences within specific corridors.

Experience	Priority Regions	Infrastructure Priorities
 African Safari	<ul style="list-style-type: none"> Maasai Mara Amboseli and Tsavo E&W 	<ul style="list-style-type: none"> Improve road connectivity on Classic Mara, Mombasa Connection and Southern Safari corridors Introduce standard format statutory signage and branded route and facility identification Introduce SOS and Hotline services along corridors linked to TPS hotline. Identify and develop integrated roadside service facilities at approx. 100km intervals on corridors Develop landside multi-modal transfer (Public and self-drive) and Tourist support centres at key airports Implement complete ICT connectivity/coverage along corridors Develop Park entrance/exit and vehicle support infrastructure Investigate dedicated KAA airport at Musiara/Narok
 Beach & Marine	<ul style="list-style-type: none"> Coast 	<ul style="list-style-type: none"> Improve road connectivity on the Coastal Treasure Trove corridor Integrate northern and southern corridor links to Mombasa City and MIA Develop alternative transfer options to South Coast that mitigate delays at the Likoni Ferry Improve beach access and public facilities including sanitation and refuse removal Otherwise as above, emphasising beach safety/security through KTPS hotline
 Wildlife/Nature/Scenic	<ul style="list-style-type: none"> Western Northern (Samburu) Coast 	<ul style="list-style-type: none"> Road connectivity on Highway to the Sky and Victorian West corridors Otherwise as above



Experience	Priority Regions	Infrastructure Priorities
 <p>Culture & Heritage</p>	<ul style="list-style-type: none"> Northern Rift Valley Central 	<ul style="list-style-type: none"> Develop Back to our Roots corridor Otherwise as above
 <p>Business/City Tourism</p>	<ul style="list-style-type: none"> Coast Western Nairobi 	<ul style="list-style-type: none"> Develop high speed links to Gateway Airports JKIA, Wilson and MIA – research rail, people movers, etc. Upgrade tourism information centres and integrate with TPS Hotline/Call centres. Address Public Transport transfer and hub options Integrate aviation security infrastructure/protocols into the Tourism Service Delivery Chain. Effective ICT coverage at key airports Otherwise as above
 <p>Adventure</p>	<ul style="list-style-type: none"> Coast Central Rift Valley 	<ul style="list-style-type: none"> As above
 <p>Sports</p>	<ul style="list-style-type: none"> Nairobi Coast Rift Valley 	<ul style="list-style-type: none"> Assess standard and condition of stadia/facilities Public Transport and connectivity mainly within cities Service infrastructure, Health & Safety and fire
 <p>Desert</p>	<ul style="list-style-type: none"> Northern 	<ul style="list-style-type: none"> Improve road connectivity on Back to our Roots corridor Otherwise as above
 <p>Niche</p>	<ul style="list-style-type: none"> Nairobi Rift Valley Western 	<ul style="list-style-type: none"> As above



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4.7 Specific Thrusts - Improve Existing - Other Actions to Support Core Experiences in Core Regions

Strategic Thrusts	Infrastructure Investment	Nodes/Comments
Develop niche tourism	1. Develop support infrastructure for new niche tourism products, including: <ul style="list-style-type: none"> a. Avitourism (Birding) b. Photography c. Voluntourism (Communities and wildlife/nature conservation) including integrating accommodation/transport options d. Flora e. Entomology f. Scientific research g. Film 	Identified opportunities on most corridors
Refresh and revamp 'tired' beach products	1. Improve connectivity and bulk infrastructure from corridors to beach resorts (Refurbishment Fund) 2. Develop supporting infrastructure packages for activity hubs/centres at strategic 'off corridor' locations.	Mombasa Diani Malindi Kilifi
Develop niche beach tourism	1. Infrastructure support for new niche tourism products, like Scuba diving, Scientific research and Water sports: <ul style="list-style-type: none"> a. Power b. Fuel c. Jetties d. Emergency equipment, ICT and security infrastructure 	Mombasa Diani Malindi Kilifi



Strategic Thrusts	Infrastructure Investment	Nodes/Comments
Enhance iconic scenic tourism experiences	<ol style="list-style-type: none"> 1. Assess access road conditions from corridor hub (e.g. Nanyuki) to assess optimum drive times – upgrade as appropriate. 2. Develop scenic drives and viewpoints in key scenic areas (especially around Mount Kenya) 3. Develop a visitor information and interpretive strategy and policy (includes directional, information and interpretive signage) 4. Develop and implement support infrastructure to deal with litter and environmental management. 5. Expand/improve tourism support infrastructure for private sector developments. 	<p>Mount Kenya Nanyuki Aberdare Lake region Meru</p>
Develop activities	<ol style="list-style-type: none"> 1. Develop activity hub support at Mount Kenya with nature-based and adventure activities, tourism facilities and services 2. Enhance existing and develop new infrastructure support for activities, including: <ol style="list-style-type: none"> a. Mountain climbing, walking and hiking, mountain biking, canopy tours, Equator experiences, arts and crafts, close animal encounters. 	<p>Mount Kenya Nanyuki Aberdare Lake region Meru Mount Longonot</p>
Fix existing cultural and heritage products	<ol style="list-style-type: none"> 1. Refresh and revamp Bomas of Kenya infrastructure mix (roads, parking, ICT, signage etc) 2. Conduct an inventory assessment of heritage assets and identify existing sites/products that require new investment 3. Refresh and revamp key museums and historical sites 	<p>Nairobi Maasai Mara Coast</p>
Product packaging for city experiences	<ol style="list-style-type: none"> 1. Improve in-city road connectivity 2. Improve signage, branding and legibility 3. Upgrade tourism information centres 4. Address Public Transport transfer and hub options 	<p>Nairobi</p>



Strategic Thrusts	Infrastructure Investment	Nodes/Comments
	<ul style="list-style-type: none"> 5. Improve pedestrian amenities in tourism zones 6. ICT connectivity/coverage 	
Business tourism strategy	<ul style="list-style-type: none"> 1. As for City Tourism 	Nairobi
Refresh and revamp existing key facilities	<ul style="list-style-type: none"> 1. Refurbish the KICC to modernise and update the facilities 2. Identify sub-optimal conference facilities for upgrades/refurbishments (use the Refurbishment Fund) 	Nairobi

4.8 Strategy Summary – Diversify Phase

In general, the implementation of 4IP during the ‘diversify’ stage will follow the same principles as for the ‘Improve Existing’ stage, but on corridors or attractions not addressed previously.

4.8.1 Specific Thrusts – Diversify Phase

Strategic Thrusts	Infrastructure Investment	Nodes/Comments
Develop drawcard products	<ul style="list-style-type: none"> 1. Lake Turkana Cradle Project – assess effective access options from Lodwar and/or Marsabit 2. Lake Victoria island experience – assess marine infrastructure support requirements at Kisumu and environs and ‘at destination’ service/environmental requirements. 3. Lake resorts – as above 	Lodwar/Marsabit Lake Victoria



Strategic Thrusts	Infrastructure Investment	Nodes/Comments
Develop beach nodes	1. Create a branded coastal destination – assess capacity constraints and requirements for additional upgrades to roads, civil services and electrical infrastructure,	Mombasa Diani Kilifi Malindi Lamu Gazi
Cruise Tourism Strategy	1. Develop infrastructure support package for with cruise tourism infrastructure at Mombasa and on Lake Victoria, including multi-modal transfer links	Mombasa Lake Victoria
Develop drawcard products - Sports	1. Investigate best-in-class infrastructure requirements for academies, etc.	Iten Nairobi Diani Malindi Kilifi Lake Victoria
Develop activities - Sports	1. Infrastructure standards for sporting codes: i.e. rugby, golf, athletics/running, cycling and water-based activities	Iten Nairobi Diani Malindi Kilifi Lake Victoria



Strategic Thrusts	Infrastructure Investment	Nodes/Comments
Health and wellness tourism strategy	<ol style="list-style-type: none"> 1. Conduct research on the latest trends in health and wellness tourism to assess requirements. 2. Identify existing natural resources that can form part of the health and wellness tourism experience offering, e.g. hot springs, natural forests etc. 	Hell's Gate Loburu
Agri-tourism strategy	<ol style="list-style-type: none"> 1. Review and refine the existing agri-tourism strategy including infrastructure requirements for irrigation, agri-support, logistics, etc. 	Rift Valley Western

4.9 Motivating the 4IP – Additional Topics

4.9.1 Topic 1 – Appropriate Airport Infrastructure Investment: Benchmarking South African Airport Infrastructure against Kenya's

In South Africa, the 9 national airports are owned by a state enterprise, The Airports Company of South Africa (“ACSA”), in a parallel structure to that in Kenya, where the KAA has direct or agency responsibility for nearly 20 key airports. It is noteworthy that, in a country of twice the land area of Kenya, although with similar population of approximately 50 million, ACSA's 9 airports handle total passenger traffic of 38 million ppa, whereas KAA's approximately 20 airports control less than 10 mil ppa. While this apparent over-investment in airport infrastructure may be attributable to differing mandates between ACSA and the KAA, the relative in-economies are nonetheless reflected to some extent in the comparative 'revenue per passenger' statistics, where ACSA's revenue per passenger is some 62 % higher than similar figures for the KAA (currently circa. ZAR R220/passenger p.a.). Against this background, it is likely that KAA may be challenged to raise requisite funding for landmark projects, the landmark Greenfield Terminal (GFT) project at JKIA being one such example. The rationalisation of priority tourism airports in the 4IP is thus suggested.

The Business Case of Airports and Economies of scale

The sustainability case of airports is a complex dynamic of demand side issues (passengers wanting to fly), supply side arrangements (airlift providers willing to provide services) and provision of infrastructure at compliant safety and security standards. All these require sufficient economies of scale to ensure sustainability. In the African context, this is only generally achieved at airports that handle passenger volumes of generally 1 mil ppa or more, although this is



subject to variability. In SA, only 3 of ACSA's 9 airports are consistently profitable, with the balance being cross-subsidized by their peers. Only OR Tambo International (18 mil), Cape Town (8mil) and King Shaka International (5mil) exceed 1 mil ppa. The situation in Kenya is similar, with only Jomo Kenyatta International (6mil ppa), Moi International (1,3 mil ppa) and Wilson (mainly GA) likely to show a sustainable Business Cases. Given these comparative statistics, the current Strategic Blueprint target of 3,0 mil International arrivals p.a. by 2030 is unlikely to transform the benefits case of Kenyan airports; hence the need to consider prioritization and rationalisation, since funding is likely to be limited.

SA's three 'Golden Triangle' airports handle the majority (over 90 %) of the SA's 40 mil passengers per year, reflecting the practical resolution of the balance between the demand and supply sides of the aviation equation and the infrastructure investment required to satisfy and sustain all stakeholders in the industry. **In Kenya, the roles played by JKIA, MIA and Wilson airports is similar**, with these airports together handling over **90 %** of Kenyan passenger and air traffic movements. Wilson is currently one of the three busiest General Aviation airports in Africa. As discussed, given the complex dynamic between demand and supply-side arrangements and the compliance costs associated with infrastructure, it is unlikely to be either desirable or practical to change this status quo and, accordingly, **priority** attention should be paid to ongoing enhancement and upgrading of these airports in particular. In addition, the KAA, like ACSA, is unlikely to be able to cross subsidize too many smaller airports that cannot generate sustainable passenger numbers.

Accordingly, the 4IP will focus on improving infrastructure at key corridor airports to address capacity constraints and deficient service levels as identified in the Diagnostics phase, rather than to attempt large scale diversification too soon in the programme.

4.9.2 Topic 2 – Prioritising Competing Transport Modes

The airports benefits case is distinctly different from that of other modes of transport that utilise roads or rail where:

- (a) the user class is much more diverse – for example, the benefit of a road is available to everybody who has access to (i.e. does not even need to own) a wheeled vehicle, and
- (b) the public benefits are more widely and directly disbursed.

In terms of triple-bottom-line benefits/objectives, the sustainability case for roads must in the long term be more advantageous than that for airports, except where these can operate at scale or show a proven and determinable catalyst effect to the development of their catchment areas. Thus, faced with an



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alternative to upgrade an existing road versus expenditure on an airport, it is more likely that the benefits package of the road, as long as travel times can be significantly reduced, will most often be more sustainable.

In Kenya, where travel distances from the key corridor airports to dominant tourist destinations are relatively short, **the road upgrade option is likely to be preferable in most cases to the airport upgrade option**. An additional benefit of this approach is that the accessibility of popular tourist destinations to domestic leisure and business tourists will be facilitated and the option to integrate new or alternative modes of access and technologies will both **'future proof'** the corridor and put downward pressure on prices of air transfers, which are currently perceived as expensive in many cases. An example of this is the current air connectivity to the Maasai Mara from (mainly) Wilson Airport, where one way transfer costs can exceed US \$ 200 for a short flight, since road transfers from Nairobi via Narok on the current road are inconvenient and often exceed 5 hours.

Unlike the situation in Europe and the US, access to airlift capacity at reasonable cost is unlikely to be broad enough to sustain acceptable growth rates for many years, as Kenya moves towards its strategic goal of 'middle income' status. Therefore, as a general strategy, road/corridor investment programmes (subject to the identified exceptions) are preferred to airport upgrades. A bonus would be if these are concurrent with improvements to mass public transport and rail networks.

Key **airside** airport infrastructure in Kenya is generally in reasonable condition and has adequate capacity to accommodate growth. The same is applicable to airlift infrastructure, subject to refinement of viable routes, alignment of networks to emerging demand and the re-negotiation of certain Bilateral Air Service Agreements (BASA's) to match the Tourism Product Strategy, such as negotiation of a BASA with the USA. However, while the general strategic recommendation is 'improve existing', there are certain upgrade/diversification options that warrant specific attention, in particular addressing landside intermodal transfer arrangements, communication (network and data) access and security protocols that enhance visitor perceptions of personal safety.



4.9.3 Topic 3 – Prioritised Airport Upgrades

Strategic Thrusts in Key Corridors	Infrastructure Investment	Nodes/Comments
Musiara/Narok	<ol style="list-style-type: none"> 1. Consolidate airport access – consider the development of Musiara airport and implement controls on the operation and proliferation of private air strips. 2. Formalise and consolidate road and storm water development and management plans within Park and Conservancy areas. 	Refer to discussion on road and airport networks

4.9.4 Topic 4 – New Era Public Transport and Accommodation Models

Based on experiences in Europe, South Africa and elsewhere, the impact of models such as Uber, Air BnB and other new era accommodation and travel models that rely heavily on social media platforms will also be profound in Kenya. This will lead to a requirement for specific provision of support infrastructure at key points such as airports and in-city termini for operators and tourists alike in terms of support facilities and more accessible, possibly ‘free’, fast and reliable ICT infrastructure. The 4IP anticipate such developments and has flexibility to accommodate further innovation in these areas.

4.9.5 Funding of Airports falling outside State Enterprise Control

In South Africa, non ACSA airports fall under local authority jurisdiction, in a situation parallel to the County arrangements in Kenya. In SA, the mandate of local authorities is to supply and support a variety of municipal services according to defined priorities where essential (or basic) municipal services **always** take precedence over non-essential services. Essential municipal services include roads, water, sanitation and electricity, with airports notably **excluded** from this definition. Thus, in the competition for scarce funding at local level, airports remain a low priority. Consequently, in SA there is a notable chasm between airports under the control of State Enterprise ACSA, and local airports. Despite some initiatives to bridge the gap, the only successful local airport projects are those where a specific airport has such a good location in relation to its catchment area, or plays so significant a role in improving the connectivity of the region which it serves, that its catalytic value as a lever to economic growth and development, as proven by specific economic cost/benefit studies, generally induces the Private Sector to assist by way of concession or PPP type arrangements in partnership with the local authorities. An example of such an airport is Pietermaritzburg in KwaZulu-Natal.



It is likely that the situation at County level in Kenya is similar, with only those airports (even if under an agency arrangement with the KAA) that can be shown to offer significant benefits to their communities, likely to be successful in the competition for scarce funds. Their contribution as enablers of **tourism, unless located in identified regions of core experiences** is not likely to be significant, because the scale at which they operate is too small to justify the significant capital investment in creating, operating and maintaining expensive aviation infrastructure. Thus, unless there are other strategic drivers outside tourism, the appropriate strategic intervention, as with KAA airports, would be to focus on the tourism blueprint priorities prior to diluting or diversifying.

4.9.6 Exogenous Risks/Opportunities

There are various exogenous risks that may impact on infrastructure strategy, the effect of which is largely unpredictable. See Annex A for further information of the potential of climate change to affect sea levels on the eastern seaboard. In addition, ongoing assessment of national energy needs/sources may impact on tourism development, if not 'at destination' then possibly in major cities that could conceivably be affected by power outages, health/sanitation issues and other impacts.



SECTION 5



Investment Strategy



National Tourism Blueprint 2030

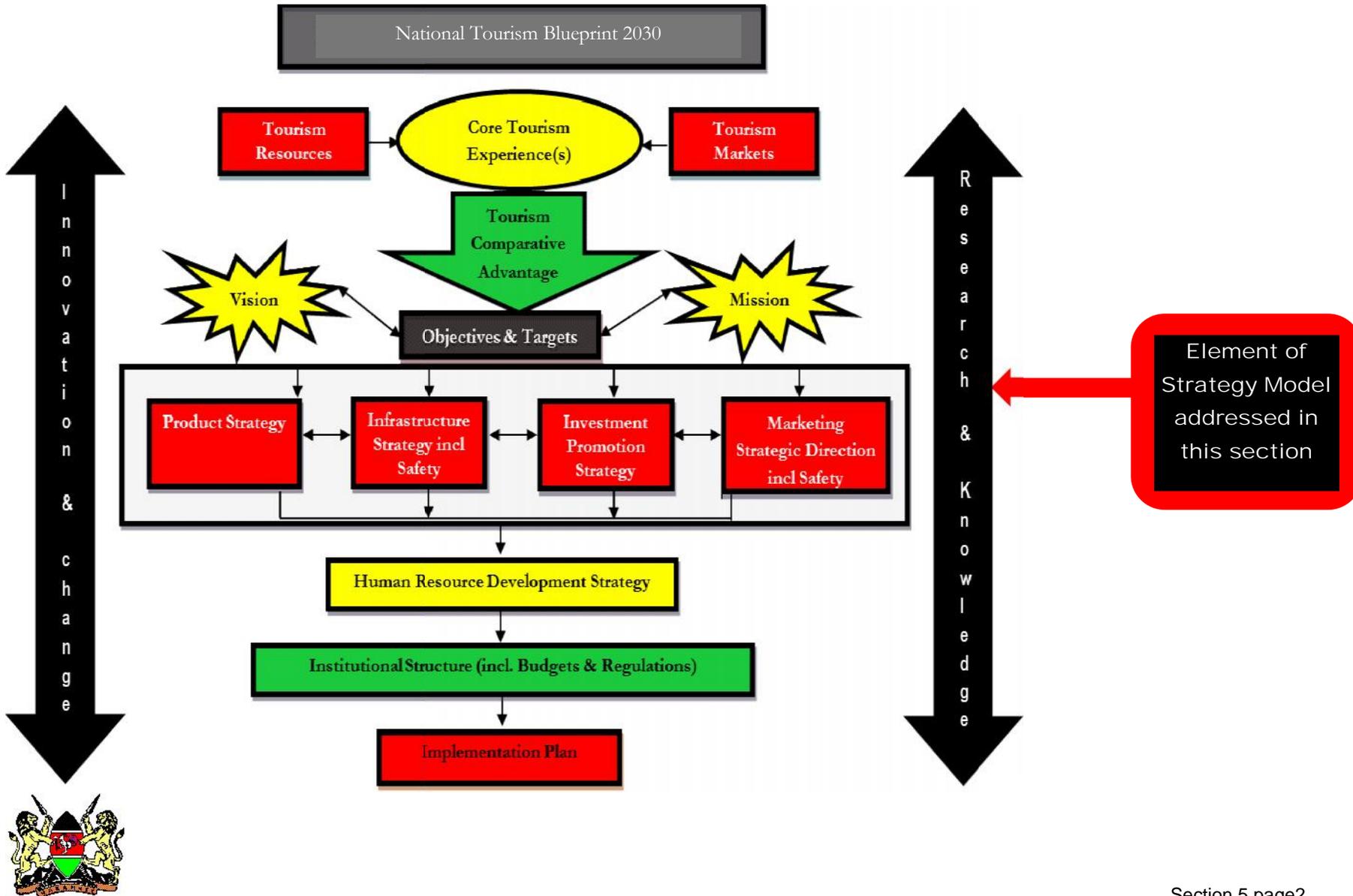
Investment Promotion Strategy

September 2017

Section 5
Detailed Strategy
Investment Promotion Strategy

Overview
Preliminaries
1. Introduction & Approach
2. Innovation and Change & Strategic Direction
3. Detailed Strategy – Product Strategy
4. Detailed Strategy – Infrastructure Strategy
5. Detailed Strategy – Investment Promotion Strategy
6. Detailed Strategy – Marketing Strategic Direction
7. Detailed Strategy – Human Resource Strategy
8. Detailed Strategy – Research and Knowledge Management Strategy
9. Detailed Strategy – Institutional Structure





5. Investment Promotion Strategy

5.1 Content for Investment Promotion Strategic Direction Plan

The strategic framework followed for the NTB2030 Investment Promotion Strategy (“TIPS”) is not based on complex theoretical strategic models but is very simple – firstly some basic principles are specified which forms the backbone of the strategy and then key strategic questions are answered to form the flesh or the plan of the strategy.

As this is essentially a sales strategy the strategic questions all have a sales orientation, viz:

- 1 What types of investment are to be attracted and where? (i.e., what to sell, where)
- 2 What value of investments is to be targeted? (i.e., how much to sell and for how much)
- 3 What types of investor are to be attracted? (i.e., who to sell to and from where)
- 4 When are investments to be targeted? (i.e., when to sell)
- 5 What activities to be undertaken to attract investors? (i.e., how to sell)
- 6 What structures/resources are required to undertake investment activities? (i.e., who will sell and with what)

Approach/Principles	Strategic Thrusts
1. Type of strategy – supply vs demand?	1. What to sell?
2. Complexity of strategy	2. Who to sell to & from where?
3. Definition of FDI & Investment	3. How to sell?
4. Minimum size of deal/project to target?	4. How much to sell & for how much?
5. Pull or push strategy	5. When to sell?
	6. Who will sell & with what?



5.2 Strategic Approach/Principles

1. Type of Strategy – Supply vs Demand

This strategy will conform strictly with the principle of market driven tourism investment. This will mean that even if a push strategy is applied (see below), the investment projects will need to be what the tourist wants and will buy. A market driven strategy requires that the investment entity approaches the promotion of an investment as if it was representing the market (i.e., the private sector) and this often requires very simple and practical measures rather than complex and expensive measures.

Approach Recommendation 1:

Market Driven Investment Promotion Strategy – What the market (tourist/investor) wants Kenya will offer.

2. Complexity of Strategy

To tie in with the above approach, the starting point for the investment strategy will be – “Keep it simple and practical”. This should ensure an easily understood and user friendly system for both Government and the private sector (investor) as well as hopefully a cost effective system as it is understood from current budgets that there is limited budget available for investment promotion.

Approach Recommendation 2:

Keep it simple and practical.

3. The definition of Tourism FDI for the purposes of this study?

- The UNCTAD definition of FDI is: “FDI occurs when an investor resident in one country (the source country) acquires ownership in and a significant influence over the management of an enterprise or productive asset in another country (the host). This may involve creating a new enterprise (greenfields investment) or changing the ownership of an existing enterprise (via a merger and or acquisition). This definition is usually taken to mean a minimum of a 10% equity stake.



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- This definition does not always cover the various modes of investment that is common in the tourism industry, for example hotel groups entering a country via management contracts with no property ownership (but who are most often the drivers of hotel projects) would be excluded in the above definition. UNCTAD also clearly acknowledges that foreigners purchasing and running hotels in the host country is not viewed as FDI. In our view both these exclusions are not just important but vital forms of investment which should never be ignored – for example one of the key tourism markets is retirees and the second home market – many of these retirees would prefer to run their second homes as revenue generating investment properties such as lodges and guesthouses and should small projects be included in the FDI approach (see below). Of course, including all modes of investment in the definition, does not mean all modes need to be specifically targeted, core investment mode targets can be established for which specific activities/programmes are developed whilst the other modes can simply be accepted and encouraged - “keep it simple and practical”.
- Similar to mode of investment, all types of investments (hotels, restaurants, casinos, attractions, shopping, entertainment, tour operations, etc) should be encouraged. However, it is suggested that for the purpose of investment promotion, only investments related to bricks and mortar (property) be included as a core investment type target for which activities are undertaken and programmes are developed (as per the tourism sector value chain provided on the next page, this would pertain to the accommodation; food, restaurant and entertainment; and shopping sub-sectors). As per UNCTAD surveys this is the norm in tourism investment promotion throughout the world.
- How foreign is “foreign direct investment”? We suggest that foreign in the case of Kenya and in the case of investment should be any investor not resident in Kenya. We further suggest that local investors (from within Kenya) also be targeted for further projects in the country.

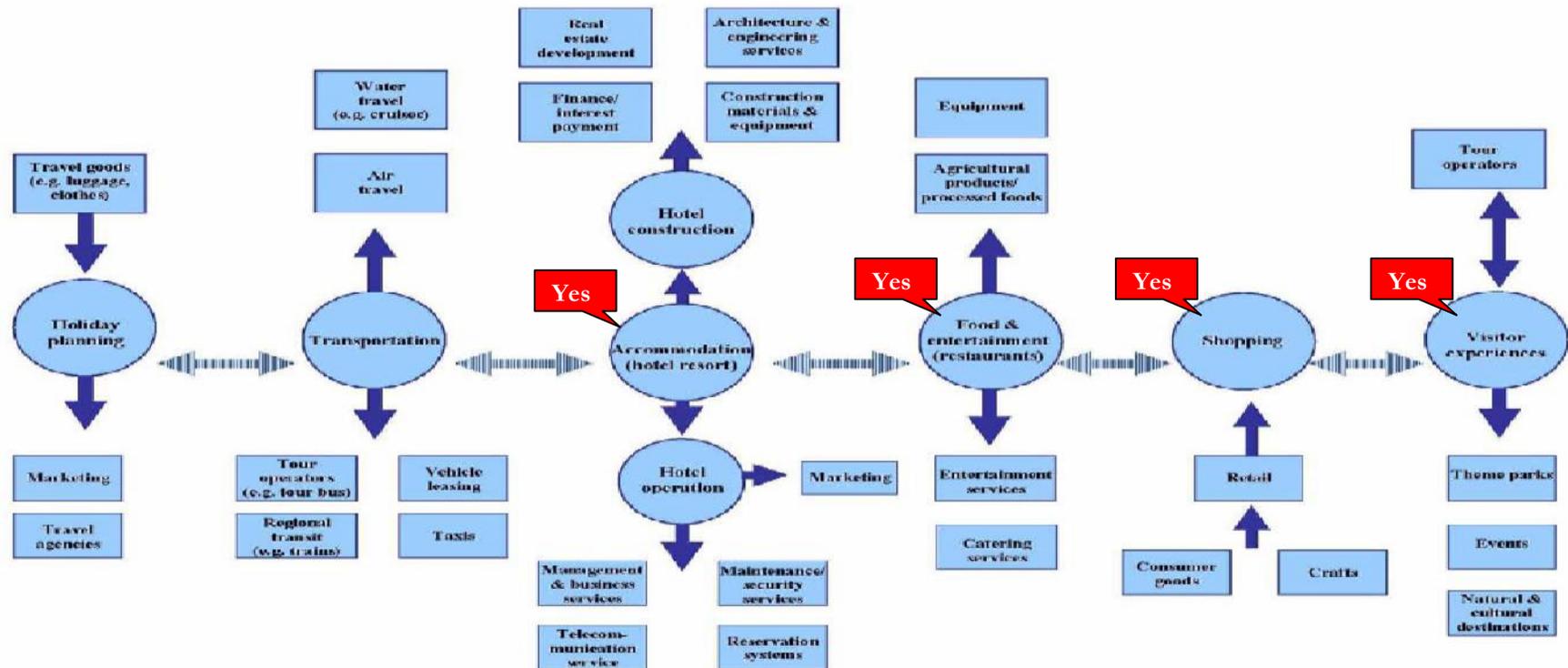
Approach Recommendation 3:

All (criteria fit) modes of investment are encouraged/accepted (not just pure FDI) from all investor sources (not just from foreign soil, ie a different country) and all types of investments. However, core investment modes, types, sources will be identified for targeting activities. In respect of investment types only those of a property orientation are to be included.



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Yes = included in the TIPS



4. The minimum size of investment to be targeted or the split between small and large projects to target

- **Just as all types of investments and investors are to be encouraged, also all sizes of investments should be encouraged. However, for targeted investment activities, a decision should be made of the minimum value of an investment to include. When formal push strategies are employed the cost of undertaking these activities are not conducive to small investments of around KES10 million and less.**

- What is small/large in respect of tourism investment?
 - Size of investment needs to be specified based on the value of the investment and not on the size of the facility developed. For instance given high building costs even a small but luxury establishment could easily exceed the small cap definition (South Africa has a small cap definition of R10 million in its Tourism PPP Toolkit and with an average building cost per basic luxury room of a minimum of R1,5 million multiplied by 10 rooms this gives an investment value of R15 million - thus, even though it is a small project, it does not fit into the small cap value definition above). In Kenyan terms this would result in a small cap of roughly KES50 million.
 - In Kenyan terms a “large” establishment would be anything larger than 100 rooms (average size of current accommodation establishments in Kenya is 10 rooms and for hotels only it is 30 rooms). At the luxury level a 100 room hotel investment would be around a minimum of KES1 billion, whilst at a limited service level, a 100 room hotel investment would be around KES200 million. Therefore a KES50 million cap is too low for small cap and far too low for large cap.
 - Also, research of tourism projects offered for investment globally shows that many of the projects are over KES3.5 billion and some mega project over KES7 billion. Although Kenya may not have many tourism projects at this scale it needs to consider that it will be competing for investors that are used to or may want to invest at this scale and offering significantly lower valued projects could make the destination seem lightweight.

Approach Recommendation 4:

- Size split (by value):
 - 40% very large; 40% large; 20% small
 - This means that 40% of all resources and activities (effort) of the KTIPS will be targeted at each very



large and large investments and 20% at small investments

- Value caps:
 - Small cap – KES25 million to KES200 million
 - Large cap – KES200 million to KES1.5 billion
 - Very large – KES1.5 billion +

5. Using an investment push or pull strategy or combination of both?

- A ‘push’ FDI strategy relies on the formal pre-packaging of tourism investments by the host country and then “pushing” these projects onto the investment market, ie implementing a pro-active approach to the market, where the investment entity takes the projects to the market.
- The ‘pull’ FDI strategy relies mainly on creating an attractive enough environment so that investors are attracted to that market and the investor then identify their own projects for investment, i.e., implementing a re-active approach where the market comes to you.
- It is not clear from the review of international tourism FDI secondary research, whether a push or pull strategy is most successful. According to UNCTAD, the majority of developing countries apply a combination of both. The extent of using one more than the other depends primarily on the maturity of the host tourism sector, the availability of a significant domestic market as well as the general economic conditions (for these reasons developed countries mostly apply pull strategies in tourism FDI).
- Kenya has a domestic tourism market but it is still viewed as developing and relatively immature. Although Kenya’s foreign tourism sector is established, it may reflect maturity in age but unfortunately as it has only developed in very specific areas and with a narrow range of products, it is not deemed mature in product development terms. However, much of the product development required may be more government than private sector investment related, ie the improvement and expansion of natural and cultural assets into attractions and tourism products, the development of events and the improvement of core



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tourism infrastructure (i.e., ICC and airlift capacity). These are not considered suitable projects for private sector investors, but infrastructure investment projects for the funding directly by government or for which government could pay private sector to fund, build and operate.

- It could be deduced therefore that a combination of a push and pull investment strategy would need to be applicable, with perhaps a heavier leaning towards a push strategy in earlier years of the TIPS moving to a pull strategy in the latter years of TIPS (assuming that with specific investment efforts Kenya will mature quickly in respect of tourism investment). Also it can be assumed that a pull strategy would be more likely for strictly private sector investments and a heavier leaning towards a push strategy for government related investments to be marketed to private sector.

Approach Recommendation 5:

Combination of push and pull strategies:

- 1st 3 years of TIPS:
 - Push – 60% of effort/activities/resources (should be primarily 'very large' and 'large' cap projects)
 - Pull – 40% of effort/activities/resources (all caps as per the size specifications)
- Thereafter:
 - Push – 25% of effort/activities/resources (should be primarily 'very large' and 'large' cap projects)
 - Pull – 75% of effort/activities/resources (all caps as per the size specifications)



5.3 Strategic Questions/Plan

5.3.1 Types of Investments to be Targeted/Investment Opportunities

Strategic Thrust 1 - What to sell where?

Strategic Sub-Thrust 1.1: Where to sell?

A high level audit of the tourism product was undertaken during the Diagnostics Study for the NTB2030 that highlighted that the current status of supply of tourism in Kenya is unclear and further work needs to be undertaken to clarify what is currently on the ground and what gaps exist that needs to be filled. It is difficult therefore to clearly identify where tourism investment is most needed in Kenya. The Product Development Strategy as part of this NTB2030 goes some way in providing guidance as to what development needs to be undertaken and in broad tourism region terms where. For the purposes of this strategy a start was made to assess the broad tourism regions (as specified in the *Product Strategy*) for tourism investment attractiveness. This can be used to identify potential investment opportunities to push via formal Investment Promotion activities in broad terms but a more area specific tourism investment attractiveness assessment is required.

As much of the tourism development will take place at the county level, and the Diagnostics Study identified that the tourism opportunities highlighted in the County IDPs need further refinement and prioritisation it is suggested that an area investment attractiveness assessment framework be undertaken by the counties and then assessed. Where a county covers a large area we suggest that it be broken down into smaller areas that can easily be assessed for investment attractiveness and to determine real investment focus areas within the county.

The Tourism Area Investment Attractiveness Assessment Framework uses the following criteria to score an area and based on the total score each area would fall into one of 5 attractiveness categories:



• **Criteria:**

1. current supply size (ie extent & variety of available tourism product)
2. current tourism demand levels
3. recent investment activity
4. access to primary tourist markets
5. likely size of future investment projects (large better than small)
6. potential demand levels
7. infrastructure availability (removal of hindrances to investment)
8. extent of packaging/intervention required to attract investment
9. governmental (national, county& local) support for tourism

• **Scoring:**

- 5 = excellent
- 4 = very good
- 3 = good
- 2 = average
- 1 = poor

• **Investment Attractiveness Categories:**

1. 80+% = prime investment areas (hot areas; significant investment opportunities)
2. 60-79% = up and coming areas (warm areas; many investment opportunities);
3. 50-60% = long term investment focus areas requiring some intervention (lukewarm areas; average investment opportunities)
4. 30-50% = long term investment focus areas required significant intervention (cool areas; limited investment opportunities)
5. 0-29% = impossible to sell areas (cold areas; no investment opportunities)



Tourism Area Investment Attractiveness Framework for Broad Tourism Regions

Criteria	Nairobi	Coast	Central	Rift Valley	Western	Masai Mara & Amboseli	Northern
1. Current supply	5	5	3	4	2	5	1
2. Current demand	5	3	4	4	2	5	1
3. Current investment activity	4	2	2	3	3	3	1
4. Access to market	5	4	3	3	3	3	1
5. Size of future projects	5	5	4	4	4	3	1
6. Potential demand	4	4	4	4	4	4	2
7. Infrastructure	4	3	4	4	3	2	1
8. Packaging / intervention required	4	4	3	3	3	4	2
9. Government support	4	4	3	3	3	3	1
TOTAL SCORE	40	34	30	32	27	32	11
%	89%	76%	69%	71%	60%	71%	24%
Category	Hot	Warm	Warm	Warm	Lukewarm to Warm	Warm	Cold
Push/Pull?	Primarily Pull	Both	Both	Both	Push to Both	Both	Push

Kenya clearly has good tourism investment opportunity as many areas scored warm to hot. A more detailed analysis by smaller areas will allow for more clarity as to where within these regions investment opportunities should be pushed or packaged.

Strategic Sub-Thrust 1.2: What to sell?

All “flagship” and other project opportunities already identified for investment as well as of course any future projects for investment, should be tested for appropriateness for inclusion in investment activities and if so for investment readiness. The criteria for both tests must be transparent and realistic.



Selection Criteria for Project Investment Appropriate and Investment Readiness Test:

- Project Investment Appropriateness Test:
 - Attractiveness for private sector (i.e., is it a project that usually would be developed by private sector or a government orientated project that private sector could build, fund and operate if paid by government)
 - Within size cap specifications
 - Required within Kenya's product and marketing strategy, i.e., what tourists want
 - Has a property orientation
- Project Investment Readiness Test:
 - Level of 'packaging' required (i.e., need to develop feasibilities/business plans or already in place)
 - Product it will respond to has an already establishment market or is in the process of being established
 - Likely and significant investor market

The flagship project opportunities listed by KenInvest and TFC are tested using the Project Investment Appropriate and Investment Readiness Test frameworks.

Investment Appropriateness Test of Existing Identified Project Opportunities

#	Flagship Project	Attractive for Private Sector	Within Size Cap Specifications	Within Product Strategy	Property Orientation
1	First Class Hotel at Bomas of Kenya	Yes	Yes	Yes	Yes
2	Isiolo Resort City	Yes	Yes but above even Very large cap – would be mega project	Yes	Yes
3	Mombasa International Convention Centre	Yes – although government infrastructure project & government would pay 'unitary charge'	Yes	Yes	Yes
4	Development of a Marina in Shimoni	Yes – although government infrastructure project & government would pay 'unitary charge'	Yes	Yes, but not in the hot zone for prioritisation	Yes



...investment promotion strategy

#	Flagship Project	Attractive for Private Sector	Within Size Cap Specifications	Within Product Strategy	Property Orientation
5	Diani Resort City	Yes	Yes but above even Very large cap – would be mega project	Yes	Yes
6	Kilifi Resort City	Yes	Yes but above even Very large cap – would be mega project	Yes, but not in the hot zone for prioritisation	Yes
7	Opportunities in National Parks	Yes – although government led through reserves and identification & packaging of greater development required	Yes	Some areas – Yes Some areas – Yes but long term	Depends on opportunities. If accommodation then Yes if guiding or other then No
8	Health Spas at Geothermal Sites a) Around Lakes Bogoria and Baringo. Two are and are in Lake Baringo and Lake Bogoria National parks offering the additional opportunity to game watch. b) Around Lake Turkana at the Kenya-Ethiopia-Sudan border. c) Maria and Buru near Lake Nakuru.	a) Perhaps b) Unlikely c) Yes	a) Yes b) Yes c) Yes	a) Yes – long term for Baringo b) Yes – long term for Turkana c) Yes	a) Yes b) Yes c) Yes
9	Community tourism projects in Kenya, ranging from Il Ngwesi and Tassia in the Laikipia area, Sarara in Namunyak, Shompole in the Magadi region and Losikitok in Amboseli.	No	Yes, but usually very small even for small cap	Yes	Depends on opportunities. If accommodation then Yes if guiding or other then No
10	Fishing resorts as well as water sporting camps at Tana River and Lake Victoria	Yes – although government led through reserves and identification & packaging of greater development required	Yes	Yes – long term	Yes
11	Resorts at Lake Victoria and Ruma National Park.	Yes – although government led through reserves and identification & packaging of greater development required	Yes	Yes – long term	Yes
12	Golf City, Nairobi	Yes	Yes but above even Very large cap – would be mega project	Yes	Yes



Investment Readiness Test of Existing Identified Project Opportunities

#	Flagship Project	Level of Packaging Required	Responding Product Market Ready	Likely/Significant Investor Market
1	First Class Hotel at Bomas of Kenya	Moderate	Yes	Yes
2	Isiolo Resort City	Significant	Yes but needs further development	Yes although not a known area
3	Mombasa International Convention Centre	Significant	Needs development	Somewhat – although not extensive market to choose from
4	Development of a Marina in Shimoni	Significant	Yes	Yes
5	Diani Resort City	Significant	Yes	Yes
6	Kilifi Resort City	Significant	Yes	Yes
7	Opportunities in National Parks	Moderate	Yes	Some areas – Yes Other areas - Perhaps
8	Health Spas at Geothermal Sites d) Around Lakes Bogoria and Baringo. Two are and are in Lake Baringo and Lake Bogoria National parks offering the additional opportunity to game watch. e) Around Lake Turkana at the Kenya-Ethiopia-Sudan border. f) Maria and Buru near Lake Nakuru.	a) Significant b) Significant c) Moderate	a) Area unknown so no ready market b) Deemed unsafe so no ready market c) Yes	a) No as area unknown b) No due to safety concerns c) Yes
9	Community tourism projects in Kenya, ranging from Il Ngwesi and Tassia in the Laikipia area, Sarara in Namunyak, Shompole in the Magadi region and Losikitok in Amboseli.	Moderate	Depends on area	Yes but complex to access
10	Fishing resorts as well as water sporting camps at Tana River and Lake Victoria	Moderate	No, needs development	To limited extent – not many similar developments undertaken as yet in Kenya
11	Resorts at Lake Victoria and Ruma National Park.	Moderate	No, needs development	To limited extent – not many similar developments undertaken as yet in Kenya
12	Golf City, Nairobi	Significant	Yes	Yes



If scoring is applied to each of the above criteria, then the projects' investment readiness will look as follows:

Investment Readiness Test of Existing Identified Project Opportunities – Scores

#	Flagship Project	Level of Packaging Required	Responding Product Market Ready	Likely/Significant Investor Market	Total
		5=None; 3=Some; 1=Significant	5=Ready; 3=Some Readiness; 1=Not ready	5=Significant; 3=Average; 1=Limited	Total Possible Score = 15
1	First Class Hotel at Bomas of Kenya	3	5	5	13
2	Isiolo Resort City	1	3	4	8
3	Mombasa International Convention Centre	2	4	3	9
4	Development of a Marina in Shimoni	1	3	5	9
5	Diani Resort City	1	5	5	11
6	Kilifi Resort City	1	5	5	11
7	Opportunities in National Parks	3	5	5	13
8	Health Spas at Geothermal Sites				
	g) Around Lakes Bogoria and Baringo. Two are and are in Lake Baringo and Lake Bogoria National parks offering the additional opportunity to game watch.	1	1	1	3
	h) Around Lake Turkana at the Kenya-Ethiopia-Sudan border.	1	1	1	3
	i) Maria and Buru near Lake Nakuru.	3	5	5	13
9	Community tourism projects in Kenya, ranging from Il Ngwesi and Tassia in the Laikipia area, Sarara in Namunyak, Shompole in the Magadi region and Losikitok in Amboseli.	3	3	3	9
10	Fishing resorts as well as water sporting camps at Tana River and Lake Victoria	3	3	3	9
11	Resorts at Lake Victoria and Ruma National Park.	3	3	3	9
12	Golf City, Nairobi	1	5	5	11



...investment promotion strategy

It is suggested that projects have to score at least 60% to be included for investment promotion activities. Of course projects could be rescored within an appropriate time-frame (minimum 6 months) should any circumstances have changed, ie market readiness improved or level of packaging required less.

Based on the above scoring, the following 12 projects should proceed as investment opportunities however it needs to be noted that 6 of these were borderline:

Flagship Project	Push or Pull Strategy Orientated
First Class Hotel at Bomas of Kenya	Pull
Isiolo Resort City	Push
Mombasa International Convention Centre	Push
Development of a Marina in Shimoni	Pull & Push
Diani Resort City	Pull & Push
Kilifi Resort City	Pull & Push
Opportunities in National Parks	Push
Health Spas at Geothermal Sites	
<ul style="list-style-type: none"> • Maria and Buru near Lake Nakuru. 	Pull
Community tourism projects in Kenya, ranging from Il Ngwesi and Tassia in the Laikipia area, Sarara in Namunyak, Shompole in the Magadi region and Losikitok in Amboseli.	Push
Fishing resorts as well as water sporting camps at Tana River and Lake Victoria	Push
Resorts at Lake Victoria and Ruma National Park.	Push
Golf City, Nairobi	Pull

6 of the above projects would fall into the push activity category, whilst 3 are within the pull category and 3 are both push and pull type projects.



5.B.3.2 Types/Sources of investors

Strategic Thrust 2 - Who to sell to & from where?

As per Strategic Approach Recommendation 3, all investment types and of course all investment sources should be encouraged, however primary target sources are necessary as budgets cannot be spread everywhere. The primary target sources for TIPS are listed below. These are the broad targets as investment sources for TIPS and specific source targets should be identified for each push project (not necessary for pull targets as once the project is known the investor is already in place and the source cannot be influenced) and it is highly likely and acceptable that these source targets may include some that are not within the broad source target list.

In keeping with the Strategic Approach Recommendations 1 (keep it simple/practical) and 3 (encourage all investors), it is the philosophy of this strategy to 'not ignore or overlook the obvious' when it comes to investor source targeting. There are some easy gains to be made in investor targeting close to home that is often ignored and it is also important to note that much of the past investment into the tourism sector in Kenya came from within Kenya. Achieving quick inroads could assist in developing vibrancy and a 'perception of success' in investment promotion, ie making investors think they will have to get in fast or lose. Also all sales techniques advocate that quick gains early in any sales process will bolster the confidence of sales persons and motivate them in future selling, ie once you get going it seems to sell itself.

Another component of the philosophy for this strategy as it concerns investor source targeting, is not to focus solely on the equity investor, but to use the intermediaries as investor sources, who will be the instigators of projects and will themselves in most instances bring the investor on board.



KTIPS Investor Sources by Type & Origin

#	Type	Suggested Origin
1.	Wealthy tourists already attracted to Kenya	Kenya Tanzania USA UK Germany Italy France India China UAE
2.	Small to medium sized Kenya Businesses and Residents not already invested in tourism	Kenya
3.	Large private companies based in Kenya	Kenya
4.	Existing investors currently targeting other countries in the African region, ie several hotel groups are looking for expansion opportunities and are investigating and have already decided to invest throughout the country/region. Please note that it is not suggested to ambush the already decided investments and steer these to Kenya, but rather to attract the same investors for additional projects in Kenya	Kenya Sub-Saharan Africa UK USA/Canada Germany/France/Italy Asia – India, China, Singapore, Malaysia Middle East – UAE
5.	Tourism investors already invested in Kenya	Kenya
6.	Tourism Operators, particularly hotel groups, restaurant and entertainment groups, etc already invested elsewhere in East Africa and Africa but not in Kenya	Kenya Sub-Saharan Africa UK USA/Canada Germany/France/Italy Asia – India, China, Singapore, Malaysia Middle East – UAE
7.	Tourism Operators, particularly hotel groups, restaurant and entertainment groups, etc not invested in Kenya or the East African region	Sub-Saharan Africa UK USA/Canada Germany/France/Italy Asia – India, China, Singapore, Malaysia Middle East – UAE
8.	Developers and contractors already developing in Kenya	Kenya
9.	Developers and contractors already invested elsewhere in Africa but not Kenya	Sub-Saharan Africa UK USA/Canada Germany/France/Italy Asia – India, China, Singapore, Malaysia Middle East – UAE



#	Type	Suggested Origin
10.	Equity investors and financiers (ie private individuals, investment banks, insurance funds, property funds, etc) already invested elsewhere in Africaand Kenya	Kenya
11.	Equity investors and financiers (ie private individuals, investment banks, insurance funds, property funds, etc) not invested in Kenya or the region	Sub-Saharan Africa UK USA/Canada Germany/France/Italy Asia – India, China, Singapore, Malaysia Middle East – UAE

5.B.3.3 What services to offer and activities to be undertaken to attract investors?

Strategic Thrust 3 - How to sell?

The ‘how to sell’ question is answered through firstly deciding on the range of investment services to offer and then the activities to be undertaken within these services.

Strategic Sub-Thrust 3.1: Investment Promotion Services

The full range of investment promotion services would include:

- **Plan:** The research and identification of investment focus areas, the identification of investment projects within these areas and the packaging of investment projects (feasibility assessment/business case) to take to the investment market.
- **Promote:** The promotion of Kenya as an investment destination, of specific areas in Kenya as investment destinations and the promotion of specific packaged investment projects.



...investment promotion strategy

- Facilitate: The hand-holding of investors through the entire investment process whether pre-packed investment projects or projects mooted by private sector parties. Particularly this relates to assistance in dealing with specific issues hindering the investment process or with connecting interested and affected parties.
- Link: A policy or lobbying service in creating an attractive environment for investment, i.e., removing investment blockages; ensuring infrastructure is in place for investment; ensuring incentives are in place, are conducive to increasing investment, are easily accessible and known to potential investors; and ensuring that financing in the tourism industry is accessible and structured in a manner that is conducive to tourism projects, etc.

Depending on the budget and resources available either the full range of investment promotion services could be offered or only a selection. The extent to which each service is provided usually depends on the maturity of the area as an investment destination as well as the available budget:

- Usually new entrants into the investment promotion arena mostly focus on the project planning and promotion services (i.e., taking the destination to the market), whereas mature destinations will focus primarily on the facilitation and linkages services (market comes to the destination). In the case of Kenya this should mean more planning and promotion type of activities, however would the budget/resources be available?
- Planning and promotion activities are very resource intensive (people and money), whilst facilitation and linkages services are less money intensive although could still require sizable people resources. Given that the budget for the TIPS implementation is likely to be a limiting factor it would make sense to concentrate on the services where the budget requirements are lower, however the maturity of the destination for tourism investment may not allow for such a concentration.

Keeping in mind the range of services required as well as the dichotomy between investment destination maturity and budget availability, the service allocation breakdown for TIPS is recommended as follows:



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TIPS Service Allocation

Service	% of Resources Deployed/Overall Effort	
	1 st 5 Years (More push)	Thereafter (More Pull)
Plan	30%	10%
Promote	40%	30%
Facilitate	20%	50%
Link	10%	10%

Strategic Sub-Thrust 3.2: Activities

Activities can be specified by service and also by whether it is specific to either a Push or Pull strategy (although some straddle both):

Service	Activities	Extent to which activity is undertaken	Strategic direction		
			Pull	Push	Both
Planning	<ol style="list-style-type: none"> 1. Identification of push projects (likely to mainly government infrastructure projects, i.e., parks, attractions, airports, ICCs as well as community driven projects and some private sector projects that need to be pushed to support a target product). Identify leads (projects) by tracking estate agency activity in the sale of large properties/farms and also planning and zoning applications. 2. Selection of appropriate projects based on the criteria specified above 3. Feasibility/business plan development of push projects or review of studies/plans already done 4. Packaging of projects which could include incentives specific to that project, ie a rates reduction from local 	<ol style="list-style-type: none"> 1. Extensive in 1st5 years, thereafter limited 2. Extensive - always 3. Extensive in 1st 3 years, thereafter limited 4. Extensive in 1st5 years, thereafter limited 			



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Service	Activities	Extent to which activity is undertaken	Strategic direction		
			Pull	Push	Both
	municipality/county, access to government markets, free government land, etc				
Promotion	5. Marketing of projects for investment by hosting own investment conferences or taking the push projects to investment missions or conferences organised by external entities or directly to specific investors	5. Extensive in 1 st 5 years, thereafter limited			
	6. Selection of appropriate private sector projects for listing on database (identify leads/projects by tracking estate agency activity in the sale of large properties/farms and also planning and zoning applications	6. Extensive, Ongoing			
	7. Marketing of destination as an investment location:				
	a. On own website {investment page(s)}	7. a Extensive			
	b. On investment related websites	7.b Limited			
	c. Through dedicated investment conferences organised by Kenya	7.c Limited			
	d. By attending investment conferences organised by external entities	7.d Limited			
	e. Editorial (PR) in investment and general relevant tourism magazines	7.e Extensive			
	f. Developing a dedicated tourism investment brochure (hand-out)	7.f Extensive			
g. Developing an "Invest in Kenya Tourism" guide					



...investment promotion strategy

Service	Activities	Extent to which activity is undertaken	Strategic direction		
			Pull	Push	Both
	h. Advertising in investment magazines	7.g Limited			
	i. Hosting own tourism investment awards	7.h Limited			
	j. Encouraging tourism investment projects to enter investment awards programmes organised by other entities	7.i Limited			
	k. Piggy back on any <u>relevant</u> KenInvest marketing initiatives (all sectors)	7.j Limited			
	l. Familiarisation trips of investors to Kenya	7.k Extensive			
	8. Undertake face-to-face sales awareness meetings with core investors or intermediaries, i.e., banks (i.e., road-show)	7.l Limited			
	9. Database activities:	8. Extensive			
	<ul style="list-style-type: none"> Either purchase a basis database from investment intermediaries or develop a database from scratch using the investor type and source targets specified above. The database should not just be a listing of contact details for investors, but also include interests and preferences of investors (which will only be obtained over time) and information on how they became aware of the potential investments (to track marketing tool effectiveness). 	9. Extensive			
	<ul style="list-style-type: none"> Maintain the database, by inputting data on investors that have shown interest in Kenya, either generally as an investment destination or in 				



Service	Activities	Extent to which activity is undertaken	Strategic direction		
			Pull	Push	Both
	specific projects. It is important that information is obtained on all enquires received in order to populate the database. These queries could just be general or could be from attendance or holding at investment promotion events.				
Facilitation	<p>10. Facilitation activities, i.e., assist push and pull strategy interested investors in dealing with general enquires as well as specific issues such as EIAs, land claims or linkages with appropriate parties on behalf of investors.</p> <ul style="list-style-type: none"> a. Database of whom to contact for a variety of relevant issues b. Database of issues and outcomes, i.e. precedents 	10. Limited in 1 st 5 years, then extensive thereafter			
Linkage	<p>11. Integration with and linkage to activities with the rest of the tourism industry and other appropriate industries/entities. For instance should investment corridors be identified that span countries.</p> <ul style="list-style-type: none"> o Ensuring appropriate financing structures that are conducive to tourism investment growth (particularly if provided by government institutions but also lobbying and creating awareness with commercial finance institutions). o Ensuring that incentives are in place and are conducive to the investment growth in the 	11. Average throughout			



...investment promotion strategy

Service	Activities	Extent to which activity is undertaken	Strategic direction		
			Pull	Push	Both
	tourism sector.				
Monitor	12. Each year it should be assessed how many projects of each size cap and push/pull category has been sold. It should be stressed that a strict annual quota system is not recommended as it is too restrictive, rather targets should be reached/reachable within the total 7 year period. As per Strategic Recommendation 1, the philosophy remains to encourage all suitable investment and if in one year more small cap projects and less large cap project have been sold and the next year vice versa, it should be acceptable as long as the overall target is still reachable. If by year 4 the small cap project quota for the entire period has been filled, but the large cap quota is still far off, then the selection process and activities would need to be reviewed in order to determine where the problem lies. Large cap projects will be absolutely necessary to reach the bullish targets set.	12. Average throughout			
	13. A review should be undertaken of the investor database at least every 2 years to ensure it is an up-to-date and effective Client Relationship Management tool for investment sales.	13. Average throughout			



5.B.3.4 Value of investments to be targeted?

Strategic Thrust 4 - How much to sell & for how much?

The question as to the minimum and maximum project values investment should be targeted, has been answered in *Strategic Approach Recommendation 4*.

The answer to the question on 'How Much to Sell' is provided in the "Investment" target in Section 2.

5.B.3.5 When are investments to be targeted?

Strategic Thrust 5 - When to sell?

The investment timing targeted should be based on the targets to be specified in this plan and the timing of activities suggested in the product development strategy and should be revised annually based on what has been achieved and market and environmental conditions.



5.B.3.6 Structures/Resources Required for MTIP

Strategic Thrust 6 - Who will sell and with what?

Strategic Sub-Thrust 6.1: Institutional Structure – Who will sell?

The broader institutional structure for tourism is provided in the NTB2030 and should be referred to however some role and responsibility allocations are provided below.

Service	Push or Pull Strategy Orientated	Responsibility
Plan	Primarily push	Ministry of Tourism & KenInvest
Promote	Push and Pull	KenInvest
Facilitate	Primarily Pull	KenInvest & Ministry of Tourism
Link	Pull	KenInvest & Ministry of Tourism

It is recommended that a firm agreement be drawn up between KenInvest and the Ministry of Tourism (and any agency it may allocate this responsibility to) as to the allocations of roles and responsibilities and the communication/linkages required between the agency and ministry to achieve a cohesive and successful implementation of the strategy. In addition these two entities should have regular (quarterly) operational interaction on activities undertaken/to be undertaken, leads generated and milestones reached. It is also recommended that the KenInvest tourism related staff undergo significant tourism training (provided by the Ministry of Tourism) to ensure that they understand the industry, how it works and what are the issues.



Strategic Sub-Thrust 6.2: With What - Budget?

The budget for tourism investment is provided in the *Institutional Structure* section.

Strategic Sub-Thrust 6.3: With What - Support & Resources?

In order to further facilitate and increase investment into the tourism sector, that will achieve the full spectrum of development recommended in the product strategy, it is important to consider two key support aspects:

- Finance
- Incentives

Finance:

It has been noted that accessing finance is a major constraint for tourism development in Kenya. The government has tried to address it through the incorporation of the TFC, however, industry advises that this has not improved but rather further complicated the financing dilemma as it is difficult and costly to access TFC finance. In addition on the commercial level, most institutions see tourism as very risky with many having had significant bad debts where they have provided finance in the industry and are now less inclined to lend money or the terms have become too stringent for what is required for a tourism development to break into the market and perform.

The following recommendations are made:

- A formal awareness creation programme to be instituted whereby the Ministry of Tourism (or whichever entity is responsible for tourism investment promotion) continuously interact with the commercial institutions to advise as to the performance in the industry, the opportunities in and plans for the industry and the blockages in respect of finance that needs consideration.
- Once the future “home” for tourism finance/investment promotion is decided the responsible entity will:



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- Undertake a survey amongst the tourism trade to determine:
 - Their issues with past and current finance products available
 - The actual requirements of the industry to foster expansion and investment in new facilities
 - How applicants would like to access the finance and what support they may require
- Once it is understood what the industry requires, finance products are to be redeveloped to suit industry requirements (where possible)
- Undertake continuous research to determine whether the finance products are relevant and “works” for the market for which they are developed.

Incentives:

According to a UNCTAD survey, only a small number of tourism investors specify that incentives are an important determinant in their location decision. In fact economic size and growth rates were more important criteria in the choice of location for foreign investors than incentives. Also tourism investors caution that if incentives for the tourism investment is promoted excessively (by ways of tourism investment promotion) they view it as a warning rather than an attraction, i.e. "If incentives are needed, we'd better not go". Also in some instances the incentives appear attractive in theory but proved to be less so in practice.

So it is important for the NTB2030 to consider the role government will play with incentives for the tourism industry. Government needs to do more than simply offer financial or fiscal incentives to attract tourism-related FDI. Often, policies that contribute to tourism-related infrastructure development may be more effective for attracting tourists and investment. Tourism-related FDI is more likely to respond to higher tourist numbers than incentives. For components of the tourism industry that is reliant on the business travel market, the most effective way a country can attract FDI in tourism is by providing strong economic growth, a recommendation that goes beyond the realm of tourism-related FDI policy per se, but which is highly pertinent.

The following recommendations are made in respect of Incentives and the NTB2030:

- Clarify exactly which incentives currently provided applies to tourism (this is not clear).

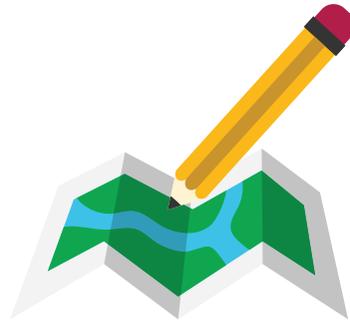


...investment promotion strategy

- Clearly provide information on the specific incentives that are relevant to the industry to all industry players including potential investors in a central place that is easily accessible. This is particularly relevant to ensuring investors are cognisant of incentives applicable to them at the outset as many incentives can no longer be claimed if the project is far down the development cycle.
- Undertake research amongst recent tourism investors, the tourism trade, the Ministry of Trade and Kenya Revenue Authority to determine which incentives are accessed, whether these incentives are relevant and working in the way envisioned, what incentives are required, etc.
- Institute changes to existing incentives or introduce new incentives applicable only to the tourism industry.
- Interact with the financial institutions and lobby them to allowing incentives to be included in their decisions processes in granting finance (commercial and government finance institutions indicated that currently incentives are excluded from financial projections for finance decision making purposes).



SECTION 6



Marketing Strategy



National Tourism Blueprint 2030

Marketing Strategic Direction

September 2017

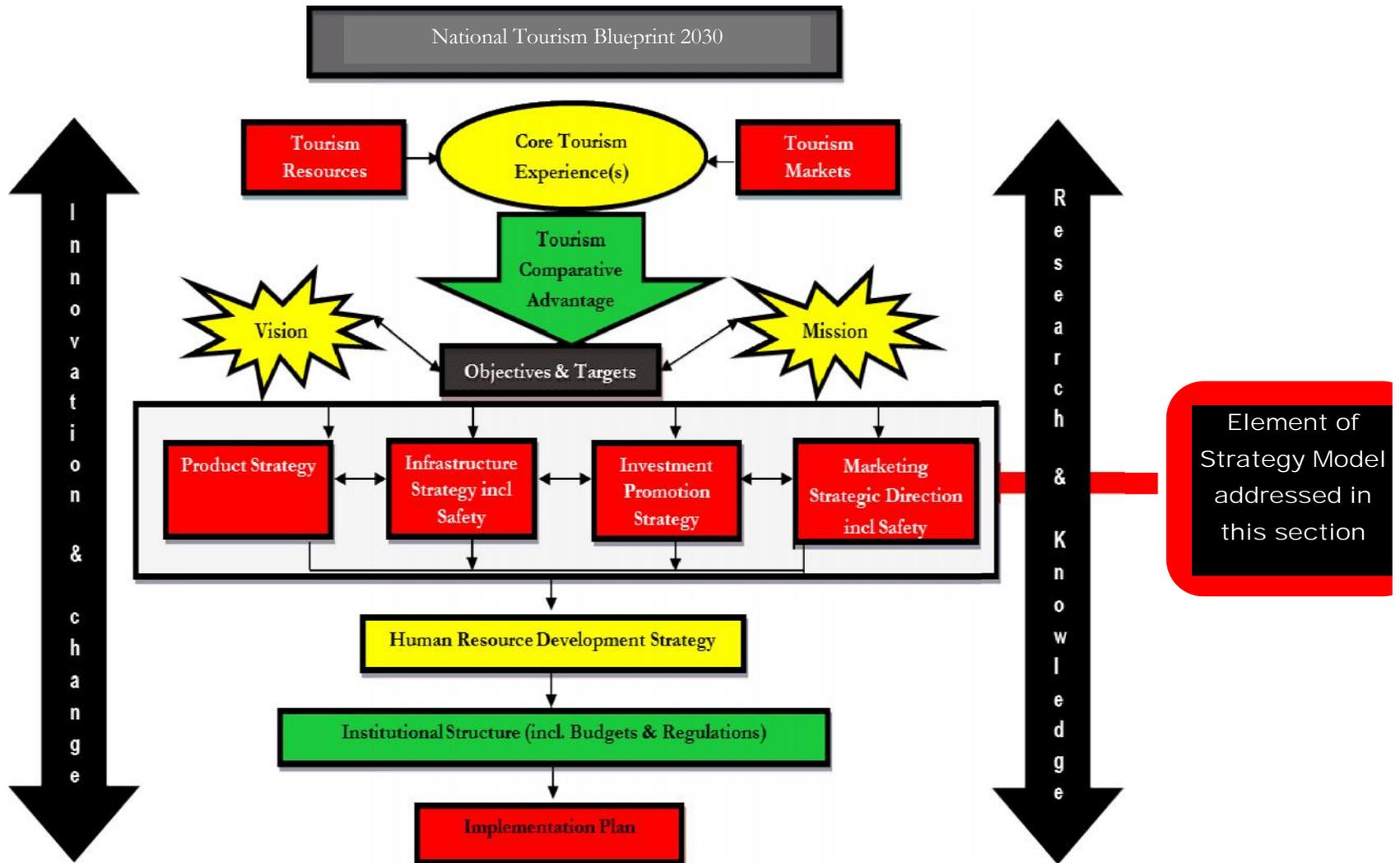
...marketing strategic direction

Section 6
Detailed Strategy
Marketing Strategic Direction

Overview
Preliminaries
1. Introduction & Approach
2. Innovation and Change & Strategic Direction
3. Detailed Strategy – Product Strategy
4. Detailed Strategy – Infrastructure Strategy
5. Detailed Strategy – Investment Promotion Strategy
6. Detailed Strategy – Marketing Strategic Direction
7. Detailed Strategy – Human Resource Strategy
8. Detailed Strategy – Research and Knowledge Management Strategy
9. Detailed Strategy – Institutional Structure



...marketing strategic direction



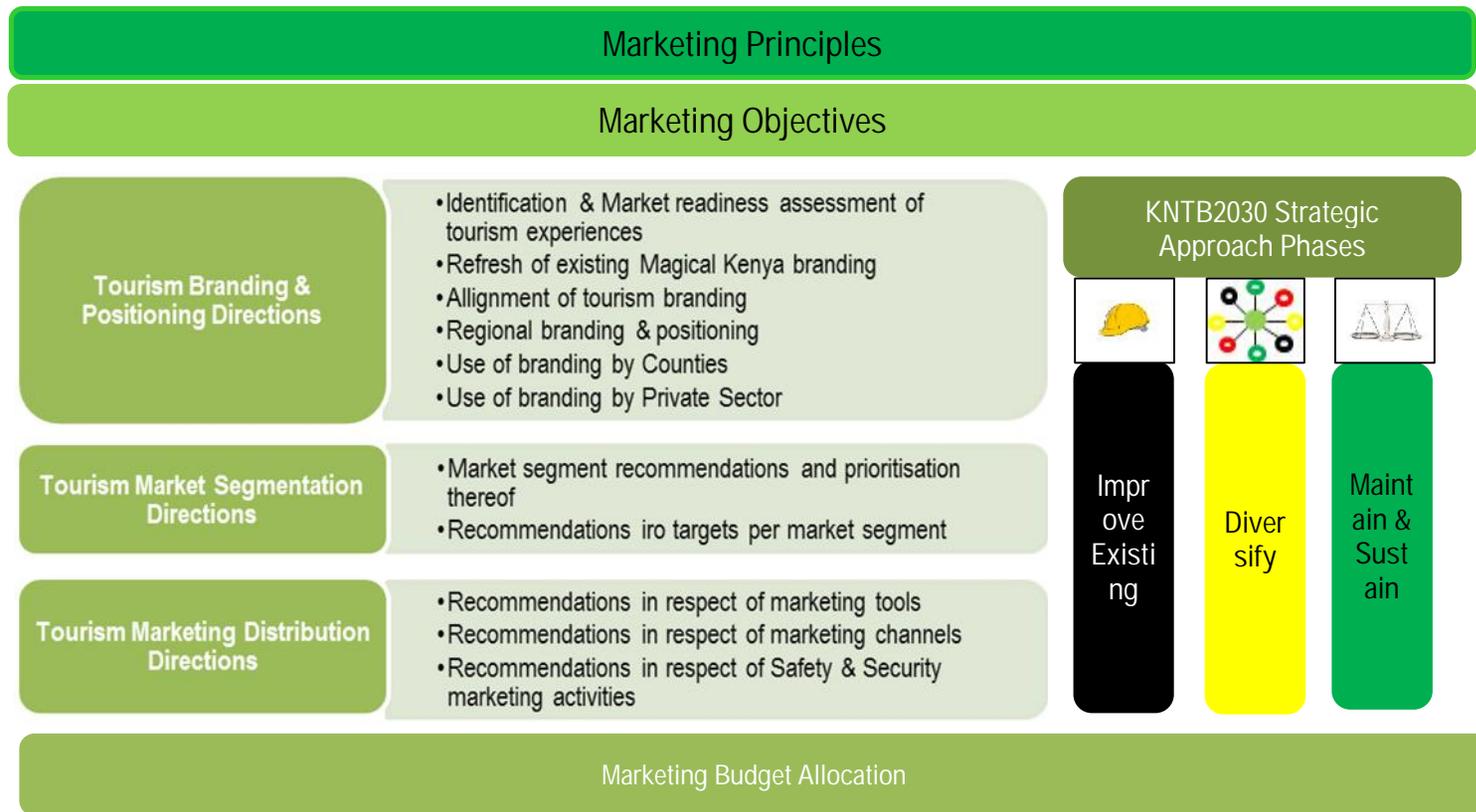
...marketing strategic direction

6. Marketing Strategic Direction Plan

6.1 Content for Marketing Strategic Direction Plan

The marketing strategic direction as part of the NTB2030 is structured as per Figure 6.1. It assumes that tourism branding, positioning, market segmentation and distribution thrusts and activities will apply across the NTB2030 Strategic Approach pillars, i.e. if a branding refresh is undertaken, it will apply to the “Improve Existing” phase as much as the “Diversify” or “Maintain/Sustain” phases.

Figure 6.1 Marketing Strategic Direction Plan Content



...marketing strategic direction

6.2 Principles for Tourism Marketing in Kenya

The following principles apply in terms of the marketing of Kenya as a tourism destination:

Principles for Tourism Marketing in Kenya

Compass for Kenya Marketing Plans– This marketing strategic plan will not be a replacement of the Kenya Marketing Strategy/Plans but will provide direction on changes/adjustments to be made by KTB required to align with the overall NTB2030. It is acknowledged that KTB has embarked on a detailed marketing strategy development and segmentation analysis process. This strategic plan will give direction to the output of the KTB studies but it will not duplicate.

Sales not marketing approach – The primary reason for a tourism strategic plan is to increase the number of visitors to and their spend in a destination. Thus, to ensure this growth, a sales approach rather than a marketing approach is recommended. This translates into the need to develop marketing campaigns with specific target markets in mind and to which objectives can be attached to measure the impact of such campaigns.

Defined public sector (as well as private sector) marketing roles – For improved coordination of marketing / sales messages and activities, the roles of the various public (and private) sector stakeholders should be clearly defined. In terms of alignment, the Kenya Tourism Board has full marketing responsibility of the country with the role of county governments being to provide tourism information and to ensure alignment in terms of branding to those set at national level.

Marketing experiences not destinations/activities– Marketing / selling should be focused on what is being bought by tourists and not where it is bought, i.e. marketing / selling must be focused on the experiences that are bought by tourists and not the places (i.e., administrative names) where it is bought. Therefore, Kenya should first be marketed in terms of its core experiences and secondly in terms of its location, i.e., where the specific experience can be bought. Marketing should also be focused on the experiences bought by tourists and not the activities that are or could be undertaken – the focus should be on the primary reason(s) for making the decision to buy the destination.

Follow a full cycle approach for each activity – Marketing / sales activities cannot be undertaken in a vacuum but needs to be timely and tactical and relevant to the specific destination. The marketing cycle approach should be followed, i.e. process of development, communication, monitoring and adjusting marketing activities needs to be undertaken (Figure 6.2). Marketing of the destination should be viewed as a dynamic and on-going process. If this cycle is not continuous then segments and/or marketing activities will become stale and eventually ineffective or absolute and arrival/trip numbers will eventually stagnate and decline. Kenya's tourism marketing strategy must follow this continuous cycle approach.



...marketing strategic direction

Figure 6.2 Marketing Activity Cycle Approach



...marketing strategic direction

6.3 Marketing Objectives

The primary objective of undertaking any marketing activities is to grow visitor numbers:



Objective: Grow visitor numbers by	Marketing Activity Cycle
<ul style="list-style-type: none"> • Identification & prioritisation of appropriate market segments - find the ideal balance between deeper penetration or maintenance of existing markets vs development of new markets 	Develop Adjust/Change
<ul style="list-style-type: none"> • Attaching targets to each marketing activity and monitoring the success of activities against their targets ("measure, measure, measure!") 	Develop Monitor Adjust/Change
<ul style="list-style-type: none"> • Ensuring all national tourism entities, counties and tourism private sector organisations live the brand (not just KTB) thus expanding marketing reach through usage of multiple marketing budgets 	Communicate Monitor
<ul style="list-style-type: none"> • Continuous and extensive communication to industry stakeholders of marketing activities – thus increasing the number of players in the industry committing to marketing activities that are aligned to KTB activities and expanding marketing reach through investment of multiple marketing budgets 	Communicate Monitor
<ul style="list-style-type: none"> • Continuous research to understand target segment needs and experiences wanted as well as support multiple marketing activities but always linked to specific market segments and targets. Research includes monitoring of success of activities and other industry player activities 	Research Monitor
<ul style="list-style-type: none"> • Connecting marketing to product (experience) development by way of target segment needs research and identification 	Research/Monitor Develop Adjust/Change



...marketing strategic direction

6.4 Marketing Strategic Direction Strategic Thrusts

The marketing strategy is underpinned by the need to grow demand through aligned and integrated tourism branding and positioning:

Strategic Thrust	
1. Aligned & Integrated Tourism Branding & Positioning	Clear overall tourism branding /positioning of the country needs to be developed and followed. All county and regional tourism branding must be aligned to national tourism branding. The national tourism branding must be utilised by all relevant public sector and private sector players in order to effectively leverage the tourism brand.

Sub-Thrust	Action Plans	Marketing Activity Cycle	KNTB2030 Strategic Approach Phase
1.1 Define the tourism experiences & assess market readiness for tourism branding purposes	<ul style="list-style-type: none"> • Define the tourism experiences for Kenya to be used for marketing purposes. Detailed experience descriptions are provided in the Product Strategy. Experiences for marketing terms defined as Core, USP, Supporting/Niche, Other (see below explanation) <ul style="list-style-type: none"> - USP Experiences defined as: <ul style="list-style-type: none"> ▪ Beach ▪ African Safari ▪ Culture/Heritage Niche Experience: <ul style="list-style-type: none"> ○ Recommendation: Culture/heritage is not an experiential USP but rather an integral housekeeping factor, i.e., a sense of being or ambiance (it is not the experience bought but rather forms part or underpins all the other USP experiences. It is part of what makes the USP experience different and unique in Kenya and it provides for enhanced authenticity). Where the actual heritage experience is purchased it is a niche product. 	Change or Develop Monitor	



...marketing strategic direction

	<p>(see next slide)</p> <ul style="list-style-type: none">- Other Core Experiences defined as:<ul style="list-style-type: none">▪ Wildlife/Nature/Scenic▪ City▪ Business- Supporting Key Niche Experiences are (Caution: not to confuse experience & activity):<ul style="list-style-type: none">▪ Culture/heritage (underpins all core experiences/making them unique)▪ Adventure▪ Sport▪ Desert▪ Other:<ul style="list-style-type: none">○ Medical○ Agri-tourism○ Health & Wellness- Supporting Activities (not considered actual "Experiences" but rather "Activities" undertaken – even if key reason for visit in limited destinations):<ul style="list-style-type: none">▪ Shopping/trading (in limited locations primary reason for visit but mostly activity during most experiences)▪ Nightlife/entertainment▪ Business travel (economically not tourism driven; not possible to market for it) <ul style="list-style-type: none">• Assess the market readiness of Kenya's tourism experiences for branding and positioning development and adjustment purposes (see below explanation).		
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USP vs Core Experience vs Niche Experience Explained

What makes Kenya's Core Experiences Core?

Kenya Beach experience is better than SA and even areas of Mozambique because of its white sandy beaches with emerald colour oceans and flat tranquil waters; unique because of quality wildlife in close proximity and different because it is supported by the Middle Eastern and other cultural influences.

Kenya African Safari is unique because it is known as the iconic safari experience, better (certainly than SA, Namibia and Botswana) as it offers the migration with large numbers of wildlife even out of migration season and different because it is underpinned by the Maasai culture.

Core Experiences are either unique to the destination or better/significantly different from a similar experience in a competitive destination

Within the core experiences there are some that are absolute USPs which sets Kenya apart from any other competitive or comparative tourism destination or that Kenya either should or can be known for or "hang its hat on"

Supporting or niche experiences are often also found in competitive destinations and are of a good quality but not significantly better or different. Supporting experiences often underpin or strengthen core the core experience. Sometimes supporting or niche experiences are also sub-sets of core experiences, i.e. such as avi-tourism in wildlife or diving in beach/marine.

Other tourism experiences may be available but are either not developed or not developed based on tourism marketing.

Caution – Not to confuse experience with activity, i.e. hiking could be an activity packaged with a scenic or nature experiences and it can also be packaged in a wildlife, adventure or avi-tourism experience. It is a thing to do whilst on a visit and not the reason the destination is purchased.



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Market Readiness of the Core & Support Tourism Experiences

Rating of experience market readiness:

- EXCELLENT** = market has excellent knowledge of the experience; has bought the experience; is either a returning tourist or an advocator for Kenya
- VERY GOOD** = market has good knowledge of the experience; has bought the experience but is not returning and not an advocator for Kenya
- AVERAGE** = market is has some knowledge of the experience, is ready but have bought the Kenya experience only in limited numbers and are not returning
- LOW** = market is ready but has limited knowledge of the Kenya experience and has not bought the Kenya experience
- VERY LOW** = the market is not ready/interested & has no knowledge of the Kenya experience

Core Tourism Experience		Market Readiness	Explanation	Branding Implications
	Beach & Marine	VERY GOOD	The market for beach tourism is strong and high levels of awareness already exist of the available experience and many market segments have visited the experience but are not returning for beach tourism purposes and not advocating Kenya as a beach tourism destination.	Ready for branding and marketing activities to be applied
	African Safari	EXCELLENT	The market for African safari is strong and high levels of awareness already exist of the available experience and many market segments have visited the experience and are returning for African safari purposes and advocating Kenya as an African safari destination.	Ready for branding and marketing activities to be applied



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Core Tourism Experience		Market Readiness	Explanation	Branding Implications
	Wildlife	VERY GOOD	Market knowledge of the diverse range of wildlife products is good but could be improved. Destination is experienced for wildlife purposes but often not as the main reason for a visit but as an add-on. Return visit usually includes a wider use of the wildlife experience. Advocacy of Kenya as a wildlife destination can be improved.	Ready for branding and marketing activities to be applied
	Nature	AVERAGE	Market knowledge of the diverse range of nature experiences is good but could be improved. Destination is experienced for nature purposes but often not as the main reason for a visit but as an add-on. Return visits usually include a wider use of the nature offering. Advocacy of Kenya as a nature destination can be improved.	Further research to be undertaken to clarify what makes this experience core and how to brand and position
	Scenic	AVERAGE	Market knowledge of the scenic experiences is good but could be improved. Destination is experienced for scenic purposes but usually not as the main reason for a visit but as an add-on. Advocacy of Kenya as a scenic destination can be improved.	Further research to be undertaken to clarify what makes this experience core and how to brand and position



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Core Tourism Experience		Market Readiness	Explanation	Branding Implications
	Culture & Heritage	AVERAGE	Market knowledge of the culture & heritage experiences is good but could be improved. Destination is experienced for culture & heritage purposes but usually not as the main reason for a visit but as a natural part of the visit. Advocacy of Kenya as a cultural and heritage destination can be improved.	Further research to be undertaken to clarify what makes this experience core and how to brand and position
	City	AVERAGE	Market knowledge of the Nairobi city experience is known amongst regional tourists but could be improved. Market knowledge of other Kenyan city experiences is low.	Further research to be undertaken to clarify what makes this experience core and how to brand and position
	Business	AVERAGE	Whilst market knowledge of the business experience is good, it can be improved through increased marketing and packaging.	Further research to be undertaken to clarify what makes this experience core and how to brand and position



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Support Tourism Product Experience		Market Readiness	Explanation	Branding Implications
	Adventure	AVERAGE	Market knowledge and packaging is average. The destination is not bought specifically for this experience but rather it is an add-on to other primary experiences.	Further research to be undertaken to clarify what makes this experience niche and how to brand and position
	Sports	AVERAGE	Market knowledge and packaging is average. The destination is not bought specifically for this experience but rather it is an add-on to other primary experiences.	Further research to be undertaken to clarify what makes this experience niche and how to brand and position
	Desert	LOW	The desert environment in Kenya has not yet been developed into an experience and market knowledge of what the country has to offer is low.	Significant research needs to be undertaken to identify what makes this an experience and only thereafter how to brand and position
	Other: Medical	AVERAGE	Nairobi has some excellent medical facilities with the potential to draw medical tourists from neighbouring countries or within Kenya. These have not been specifically developed or packaged for medical tourism purposes so some development in terms of markets is required particularly relating to elective procedures.	Further research to be undertaken to clarify what makes this experience niche and how to brand and position



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Support Tourism Product Experience		Market Readiness	Explanation	Branding Implications
	Other: Agri-tourism	LOW	Whilst Kenya has a strong agricultural sector, market knowledge and packaging requires development.	Significant research needs to be undertaken to identify what makes this an experience and only thereafter how to brand and position
	Other: Health & Wellness	LOW	Whilst Kenya has some natural resources that lend themselves towards health and wellness tourism, market knowledge and packaging requires development.	Significant research needs to be undertaken to identify what makes this an experience and only thereafter how to brand and position



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Sub-Thrust	Action Plans	Marketing Activity Cycle	KNTB2030 Strategic Approach Phase
1.2 Refresh or develop a new Kenya Tourism Brand	<ul style="list-style-type: none"> • Undertake further stakeholder input collation to determine whether to create an entire new tourism brand or keep the current tourism brand, “Magical Kenya”, but refresh and expand it. • Make informed decisions on which categories of the Future Brand Country Brand net promotor scores Kenya would like to improve and what scores are to be aimed for (see also Objectives/Targets in Section 2). • Brief a brand development agency to develop a new or refreshed tourism brand identity for Kenya. This may be a phased approach, i.e. Phase 1 – refresh current brand and start research on rebrand and Phase 2 – introduce revised or new brand. • Launch the new/refreshed brand identity (not just the primary logo but the entire brand toolbox) to the tourism industry in Kenya. (Branding suggestions are provided below). • Update all collateral with new/refreshed branding. 	Change or Develop Communicate Monitor	

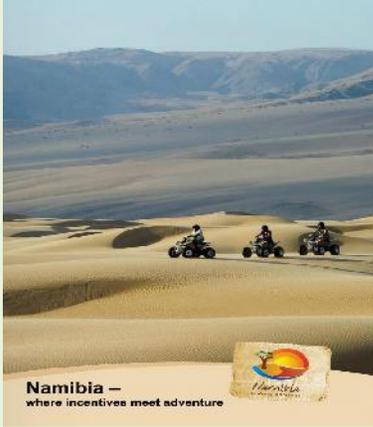


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Tourism Brand Comparisons & Suggestions for Kenya			
Country	Main Tourism Brand (logo and tagline)	Variations of Tourism Brand (logo and tag line)	Basis of Tourism Branding
Kenya			<ul style="list-style-type: none"> ○ Both generic logo with tag word not tag line ○ No experience tag lines. ○ Limited brand identity toolkit.
South Africa		<ul style="list-style-type: none"> - Current "Meet South Africa, Love South Africa" campaign covers a variety of experiences, some examples: <ul style="list-style-type: none"> ▪ Let the waves lift your soul along South Africa's sun-soaked coast ▪ Free the adventurous spirit within. Come play! ▪ A safari spectacle - discover South Africa's untouched wild 	<ul style="list-style-type: none"> ○ Both generic logo and short tag line. ○ Experience tag lines differ but not always attention grabbing. ○ Comprehensive brand identity toolkit but not all provinces and areas using the national branding consistently and some not at all. <p> Good example to emulate</p>
Morocco		<ul style="list-style-type: none"> - Much mor sun - Much mor sea - Much mor sand - Much mor surf - Much mor Riad - Much mor golf - Much mor trek - Much mor fun 	<ul style="list-style-type: none"> ○ Both generic logo and short tag line. ○ Experience tag lines differ. ○ Comprehensive brand identity toolkit. <p> Excellent example to emulate</p>



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Country	Main Tourism Brand (logo and tagline)	Variations of Tourism Brand (logo and tag line)	Basis of Tourism Branding
Namibia			<ul style="list-style-type: none"> ○ Both generic logo and short tag line. ○ Experience brochures but not really experiential tag lines or branding. ○ Limited brand identity toolkit.



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Country	Main Tourism Brand (logo and tagline)	Variations of Tourism Brand (logo and tag line)	Basis of Tourism Branding
Tanzania			<ul style="list-style-type: none"> ○ Both generic logo and short tag line. ○ No experience tag lines or branding. ○ Limited brand identity toolkit.
Mauritius			<ul style="list-style-type: none"> ○ Both generic logo and short tag line. ○ No experience tag lines or branding but collateral for beach, culture and generic. ○ Limited brand identity toolkit.
India			<ul style="list-style-type: none"> ○ Both generic logo and short tag line or rather tag word. ○ No experience tag lines or branding. ○ Limited brand identity toolkit.



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Country	Main Tourism Brand (logo and tagline)	Variations of Tourism Brand (logo and tag line)	Basis of Tourism Branding
Thailand			<ul style="list-style-type: none"> ○ Both generic logo and short tag line, essentially only a tag word not line. ○ Although experience collateral exist no experience tag lines are used. ○ Good brand identity toolkit however limited consistency between look of collateral. <p> Good example to emulate</p>
Brazil			<ul style="list-style-type: none"> ○ Both generic logo and short tag line, essentially only a tag word not line. ○ Although experience collateral exists no experience tag lines are used. ○ Limited brand identity toolkit.



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Country	Main Tourism Brand (logo and tagline)	Variations of Tourism Brand (logo and tag line)	Basis of Tourism Branding
Australia			<ul style="list-style-type: none"> ○ Both generic logo and short tag line. ○ Experience tag lines differ but linked with generic tag line. ○ Focused core ("lead") experience approach with only 3 experiences. ○ Comprehensive brand identity toolkit. <p style="text-align: right;">  Excellent example to emulate </p>



Supra Brand Recommendations for Kenya

- The headpiece is fairly busy and looks somewhat old fashioned. The very good and excellent brands are simple, clean and modern in design and colour.
- This design either needs to be reworked and refreshed or a new icon design is to be developed that epitomises Kenya or no design could be used (many brands have no designs only the Country name and one word tag lines, i.e. India and Thailand).

- The font used for "Kenya" is old fashioned.
- The very good and excellent brands use clear and simple fonts and the "Kenya" font needs to be refreshed accordingly.
- The use of 3 colours in "Kenya" could also be simplified to one or maximum two colours.

- None of the other brands include the web address in the brand logo.
- It is suggested that the decision to keep or exclude the web address be taken based on how it fits into the new or refreshed brand design.



- The one tag word or short sentence tag lines are popular and in comparison Kenya's one tag word is still relevant and it is recommended that this approach remains.
- The real question is though whether the "Magical" word is the correct word for Kenya's tourism brand:
 - o Is it correct for Kenya (does it talk to Kenya's offering)? Synonyms for "Magical" are "enchanting, fairylike, charme dreamlike, mystic and supernatural". Do these terms describe the Beach or African Safari experiences of Kenya?
 - o Is it correct for the market (what does the market associate the term and is it a word used by the current and future market, i.e., is it a modern or old-fashioned word)?
 - o Tourists commonly list the word "Magical" in describing their visit to Kenya and thus it is relevant for the existing market. KTB MDRs indicated their markets resonate with the brand they believe it is emotive. The question is whether future market segments not as yet targeted will have the same resonance.
 - o It is recommended that the brand refresh includes an assessment of whether to keep the "Magical" tag word or whether to change to another word and to investigate the word (this may be a phased approach). Suggested new words from stakeholders were *Unbelievable, Thrilling, Exhilarating, Awesome, Compelling, Captivating, Remarkable, Exceptional, Splendid, Impressive and Magnificent*.
- It has been suggested in the KTB strategy that the brand refresh in a tag line for the supra brand. It is recommended that no further tag be included for the generic/supra brand but instead experiential tag be developed for core experiences.
- The font used for "Magical" needs to be updated to be bolder in order to stand out more and a fresh and modern font is suggested.

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Sub-Thrust	Action Plans	Marketing Activity Cycle	KNTB2030 Strategic Approach Phase
1.3 Alignment of all other tourism branding (counties, private sector) with the new/refreshed national Tourism Branding	<ul style="list-style-type: none"> Maintain close alignment between the national tourism branding as proposed by KTB and that used by other government tourism entities, private sector and counties. This applies not just in the use of the primary logo but the entire brand toolbox (usage of colours, fonts, taglines, language, etc) Continuously monitor the usage of the brand. 	Change / Adjust Monitor	
1.4 Develop New/Refreshed Tourism Branding & Positioning to be Core Experience Based	<ul style="list-style-type: none"> Work within the parameters of new or refreshed tourism re-branding AND develop additional "Experiential" (i.e. what to do) tag lines and positioning materials – no generic destination selling, always by core experience in general marketing tools and by niche experience in niche marketing tools(see suggestions below) Undertake continuous research with both consumers and the trade to confirm core experience/USPs and to monitor whether these are the core experiences actually sold, sought and bought. If not the agreed list of core experiences need to be adjusted. It is also important to gauge why each experience is seen as core so this can be used in positioning statements and market collateral by all stakeholders (See Research Strategy) 	Develop Research	
1.5 Expand New/refreshed Tourism Branding & Positioning by specifying Key Supporting or Niche Experiences	<ul style="list-style-type: none"> Work within the parameters of new or refreshed tourism re-branding AND develop additional "Experiential" (i.e. what to do) tag lines and positioning materials – no generic destination selling, always by core experience in general marketing tools and by niche experience in niche marketing tools see suggestions below) Continuously undertake further research with both consumers and the trade to confirm niche experiences and to monitor whether these are the experiences actually sold, sought and bought. If not the agreed list of experiences need to be adjusted. (See Research Strategy) 	Develop Research Monitor Change / Adjust	



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Experience Positioning Statement (Tag lines) Suggestions for Kenya

It should be noted that:

- These are concept messages or word suggestions for a brand development agency to use to refine experience specific tag lines.
- Positioning words/messagessuggestions are provided by broad geographic market to allow for association emphasis and differentiation required.
- Positioning words/messages suggestions are provided only for USP experiences and the same approach should be taken for other core and supporting/niche experiences
- Branding by regions is not recommended as it leads to multiple brands which confuse tourists and subsequently weakens the supra-brand.
- It is noted that a process has already begun for the revival strategy for the Coast and the suggestion of the “Swahili Riviera” has been made to brand the Coast in order for it to stand out from competitive beach destinations – particularly in Africa. It has to be noted that this is not a regional branding but rather the branding of Kenya’s Coastal or Beach experience which desperately requires differentiation to stand out from other African as well as global beach destinations.

Given that Swahili is also spoken in Tanzania it is a concern that the “Swahili Riviera” would be associated not only with Kenya but also with Tanzania and that Kenya would inadvertently sell the Tanzanian beach product. Other suggestions that have also been made for this Coastal brand are “Karibu Coast” or “Bahari Coast”. Again, as “Karibu” is already used by Tanzania in their marketing collateral, and Bahari and



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Karibu are Swahili words also spoken in Tanzania, inadvertently Kenya could sell Tanzania. The only way therefore such a Coastal branding would work is if both countries adopt it but then Kenya has no way of differentiating its beach product from its immediate neighbours.

The concept of a Coastal brand is good, the selection of the actual name just need to be carefully considered.

- **Recommendation:** It is recommended that an experiential branding approach be taken for Kenya which links back to the supra brand in order to reinforce and leverage it as much as possible. This is similar to the Moroccan “Much Mor occan” brand strategy, i.e. “Much Mor Sun”, “Mur Mor Trek” etc.

If the “Magical” tag word is kept then it would apply as follows:

- “Magical Coast” for Beach/Marine Experience
- “Magical Safari” for the African Safari Experience
- “Magical People” for the Culture/Heritage Experience
- “Magical Wildlife” for the Wildlife Experience
- “Magical Nature” for the Nature Experience
- “Magical Scenery” for the Scenic Experience

If the “Magical” tag word is changed then it can be adapted for example:

- “Magnificent Kenya”; “Magnificent Coast” for Beach/Marine Experience
- “Exceptional Kenya”, “ExceptionalSafari” for the African Safari Experience

It is also recommended to look at using an abbreviation of “Kenya” as is already used by some institutions, i.e. “KenInvest” and adding the “Ken” to the experience for example:

- “KenInspire” for African Safari Experience or just use “KenSafari”
- “KenIntense” for the Adventure Experience or just use “KenAdventure”

“Ken” in English is an old or colloquial term for “Know”. So by using the “Ken” abbreviation it not only refers to Kenya but Knowing Kenya.



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Some general key words/concepts for positioning and brand development obtained from stakeholders as words associated with Kenya are:



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Positioning for Market Segments: 1. Specify positioning for USP Experiences (BEACH Experience)

USP Experiences	Market	Kenya Branding linkage	Positioning Message Elements/Words	
1. Beach	Domestic	<ul style="list-style-type: none"> • “Magical Coast” • “Magical sun, sea & sand” • “Magical fun” • “Magical holiday” • “KenCoast” or “KenKoaast” 	<ul style="list-style-type: none"> • See the sea • Soft sandy beaches • Holiday • “Your Mombasa” – understand this is a term used amongst Kenyans which refers to “what makes you happy” or “what do you aspire to” • Warm weather, waters, people (friendly/relaxed) • Fun 	<ul style="list-style-type: none"> • Close/accessible (distance) • Lots to do/active/vibrant (water sports, shopping, entertainment, nightlife) – although needs to be developed for domestic • Relaxation • Equal or better than other African beach destinations • Affordable (compared to overseas beach destinations due to transport costs)
	Europe Americas Asia	<ul style="list-style-type: none"> • “Magical Coast” • “Magical sun, sea & sand” • “Magical footprints in the sand” – come and go with the tides • “KenCoast” or “KenKoaast” 	<ul style="list-style-type: none"> • Pristine/untouched/untamed/natural beach scenery (not Mombasa but rest of coast) • Empty/undeveloped beaches (no crowds) • African beaches • African beach and wildlife in one package/trip • African beach and scenery in one package/trip 	<ul style="list-style-type: none"> • African beach and Kenyan culture/heritage in one package/trip • Warm/hot/sunny weather year round • Friendly and welcoming people • Lots of activities/lots to do/vibrant in close proximity



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	EAC, SADC, Rest of Africa & Indian Ocean Islands	<ul style="list-style-type: none"> • “Magical Coast” • “Magical sun, sea & sand” • “Magical fun” • “Magical holiday” • “KenCoast” or “KenKoast” 	<ul style="list-style-type: none"> • See the sea • Emerald, crystal clear, tranquil oceans • Soft sandy beaches • Holiday • Warm weather and waters • Warm people (friendly/relaxed) • Fun • Relaxation 	<ul style="list-style-type: none"> • Close/accessible (distance) • Lots to do/active/vibrant (water sports, shopping, entertainment, nightlife) – although needs to be developed for domestic • Equal or better than other African beach destinations • Affordable (compared to overseas beach destinations due to transport costs)
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Positioning for Market Segments: 2. Specify positioning for USP Experiences (AFRICAN SAFARI Experience)

It should be noted that:

- The term “Safari” although originally strongly associated with the East African (and particularly Kenyan) wildlife product, is being used by a multitude of destinations to refer to a wildlife or wilderness experience, not just in Africa but on other continents as well.
- It is unlikely at this stage that Kenya would be able to take back ownership of the safari experience as it is not unique to Kenya. However as this is a strong USP for Kenya, the destination needs to strongly differentiate its safari experience from that offered in other destinations. In the Product Strategy the experience has been referred to as “African safari” in order to commence with this differentiation however on the Africa continent Tanzania, South Africa, Namibia and Botswana all use the term as well in selling their Big 5 wildlife experience. Thus “African Safari” is unlikely to achieve strong differentiation (in fact Tanzania sells itself as the “top African safari” destination). It is possible to use terms like “original safari” and “Out of Africa Safari” in the scripts which will assist to differentiate Kenya.
- Recommendation: Instead of a establishing another brand that has to be developed, launched and supported, rather follow the experiential branding approach and link back to the supra brand in order to reinforce and leverage it as much as possible, i.e. “Magical Safari”.



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USP Experiences	Market	Kenya Branding linkage	Positioning Message Elements/Words	
2. African Safari	Domestic	<ul style="list-style-type: none"> • "Magical Safari" • "Magical wildlife" • "Magical heritage" • "Magical experience" – must do, shows you have arrived in economic standing • "KenSafari" 	<ul style="list-style-type: none"> • Exciting wildlife viewing • Large herds of wildebeest • Freedom of the bush • Open savannahs 	<ul style="list-style-type: none"> • Experience your heritage • Close/accessible (but after road upgrade) • Less commercialised – more natural
	Europe Americas Asia	<ul style="list-style-type: none"> • "Magical Safari" • "Magical Maasai Mara" • "Magical wildlife" • "Magical experience" – must do, once in a lifetime • "KenSafari" • "KenEpic" • "KenIconic" • "KenClassic" 	<ul style="list-style-type: none"> • Exciting wildlife viewing • Large herds of wildebeest 365 days of the year • Migration • Open savannahs • Sub-tropical/warm/hot • Conservation • Less commercialised – more natural 	<ul style="list-style-type: none"> • Freedom of the bush • African safari and beach in one package/trip (close in distance) • African safari and other wildlife in one package/trip • African safari culture/heritage (particularly Maasai in Maasai Mara) in one package/trip
	EAC, SADC, Rest of Africa & Indian Ocean Islands	<ul style="list-style-type: none"> • "Magical Safari" • "Magical wildlife" • "Magical heritage" • "Magical experience" – must do, shows you have arrived in economic standing • "KenSafari" 	<ul style="list-style-type: none"> • Exciting wildlife viewing • Large herds of wildebeest • Migration • Freedom of the bush • Open savannahs 	<ul style="list-style-type: none"> • Experience your heritage • Close/accessible (but after road upgrade) • Less commercialised – more natural



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Positioning for Market Segments: 3. Specify positioning for the CULTURAL/HERITAGE segment as an underpinning mechanism & a niche experience

Please note:

Given the importance of culture/heritage in supporting other core experiences or making these experiences unique, it is imperative that positioning message elements are also included for heritage/culture that should be used in conjunction with core experience positioning.

USP Experiences	Market	Kenya Branding linkage	Positioning Message Elements/Words
Culture/Heritage as underpinning activity to core experiences	Domestic & EAC	<ul style="list-style-type: none"> • "Local is Magic" • "Magical Heritage" • "Magical People" • "KenMaasai" • "KenKenya" • "KenCulture" • "Kenyology" 	<ul style="list-style-type: none"> • Hospitable/Warm and friendly people • Welcoming to all visitors not just Foreign tourists • Kenyan culture (all) - dress, jewellery, food, smells, colours, vibrancy, architecture, jewellery, authentic rituals, music, dance, religion, language
	Europe Americas Asia	<ul style="list-style-type: none"> • "Magical Culture" • "Magical Heritage" • "Magical People" • "Magical Maasai" • "Magical Luo" • "KenMaasai" • "KenKenya" • "KenCulture" • "Kenyology" 	<ul style="list-style-type: none"> • Hospitable/warm and friendly people • All aspects of "Kenyaness" –authentic and modern: dress, jewellery, food, smells, colours, vibrancy, architecture, beads, authentic rituals, music, dance, religion, language
Culture/Heritage as niche experience	Europe Americas Asia	<ul style="list-style-type: none"> • "Magical Culture" • "Magical Heritage" • "Magical People" • "Magical Maasai" • "Magical Luo" • "Magical beginnings" • "Magical footprints" 	<ul style="list-style-type: none"> • Authentic rituals and everyday/living culture • Depth/detail of everyday/living culture • Kenya history • Kenya cultures • Unique aspects of cultures • Educational/learning aspects of culture • Iconic aspects of heritage



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	<ul style="list-style-type: none"> • "KenMaasai" • "KenKenya" • "KenCulture" • "Kenyology" 	
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Sub-Thrust	Action Plans		Marketing Activity Cycle	KNTB2030 Strategic Approach Phase
1.6 Identify potential for long term expansion & development of visitor experiences	<ul style="list-style-type: none"> • Further develop the following existing Supporting or Key Niche Experiences that have potential to become Core experiences in the medium to long term: <ul style="list-style-type: none"> - Business Tourism (MICE), Sports & Events - Adventure - Culture/Heritage - Other 	<p>Why?</p> <ul style="list-style-type: none"> • Culture/heritage is already an underpinning factor and a niche experience which if further developed could become an iconic core experience • Adventure is a niche experience/activity which can be found throughout the country, however if some iconic elements could be developed that is unique to Kenya (i.e. Mount Kenya) it could be elevated to a core experience • Business Tourism & Events is already significant in Nairobi. With the development of the Convention Bureau, further 	Develop	



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		focus on unique Kenyan events and expansion into the rest of Kenya, this could be elevated to a core experience		
	<ul style="list-style-type: none"> Develop the following Supporting Activities that have potential to become Supporting or Niche Experiences in the medium to long term: <ul style="list-style-type: none"> Shopping/trading 	<p>Why?</p> <ul style="list-style-type: none"> Shopping and trading is a 'must have underpinning activity for most other core and niche experiences. At this stage it is not unique and different enough to qualify as a core experience but with development of unique and differentiated shopping niches it could be developed into a core experience which is particularly important to attract the African market. 		
	<ul style="list-style-type: none"> Develop the following segments that have been identified as experiences that have potential that could be developed in the medium to long term: <ul style="list-style-type: none"> Medical tourism 	<p>Why?</p> <ul style="list-style-type: none"> Some medical tourism already exist in the country (specifically in Nairobi) but it is possible to develop this into a niche and thereafter a core experience for the African markets 		



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<p>1.7 Strongly align County use of Branding & Positioning to National Branding & Positioning</p>	<ul style="list-style-type: none"> • Implement a policy of no separate branding by geographical region, only by experience. Counties to utilise the various experiential brandings prominent in their area. Current designated tourism regions to fall away from a brand perspective, and stress information provision. • Implement a policy of no separate branding/positioning strategies to be developed by counties or regions. National branding and positioning strategies to be followed instead. Particularly in respect of foreign market. • Communicate to the public sector the branding strategy, the branding materials available and how they are to use it. (See Institutional Framework) • Make branding strategy and branding materials easily accessible to and usable by county public sector. • Monitor the usage of the national branding materials by county and regional public sector and if not used determine concerns and adjust accordingly if required. (See Research Strategy) 	<p>Communicate Monitor Change / Adjust</p>	
<p>1.8 Encourage the use of National tourism branding by Private Sector</p>	<ul style="list-style-type: none"> • Through continuous dialogue with the private sector determine whether experiences branded are in fact experiences sold by private sector and sought and bought by their customers. • Communicate to the private sector the branding strategy, the branding materials available and how they are to use it. (See Institutional Framework) • Make branding strategy and branding materials accessible to and usable by private sector. • Monitor the usage of the materials by private sector and if not used determine the reasons why and adjust materials accordingly if required. (See Research Strategy) 	<p>Communicate Monitor Change / Adjust</p>	



...marketing strategic direction

Strategic Thrust	
2. Prioritised & Experience Based Market Segmentation	Specify market segments from a geographic/source market, experience and customer type perspective. Once markets are specified, prioritise segments and allocate targets.

Sub-Thrust	Action Plans	Marketing Activity Cycle	KNTB2030 Strategic Approach Phase
2.1 Develop Current & Recommended Market Segmentation Grid	<ul style="list-style-type: none"> Establish current (basis) Kenya tourism market segmentation grid. Based on existing information identify changes to take into consideration in respect of the current Kenya tourism market segmentation grid. Based on existing market information, adjust tourism market segmentation grid (based on current grid format) and prioritise. Decide on market segmentation focus. Based on existing market information align the grid to core experiences and re-prioritise. Identify market intelligence gaps impairing the decision making process, undertake research to fill identified gaps and adjust the tourism market segmentation grid accordingly. (See Research Strategy) Communicate that market segmentation grid to public and private sector stakeholders & monitor their implementation of the segments. If not followed identify reasons and adjust grid accordingly if required. (See Institutional Framework & Research Strategy) 	Develop Communicate Research Monitor Change / Adjust	



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Tourism Market Segmentation: Establish Current Grid for Kenya & Changes to consider

It should be noted that:

- It is understood that KTB has recently appointed a consulting firm to assist with a tourism segmentation strategy for Kenya. For this reason this strategy provides suggestions as to the process to be followed and some broad direction as to the segmentation strategy required to fulfill the greater NTB2030.
- Detailed segmentation matrixes are not provided as this would be duplication. However, examples of segmentation matrix frameworks that should be developed (with no data) is provided.



...marketing strategic direction

Base or Existing Tourism Market Segmentation Grid for Kenya:

Market	Geographic Scope			Purpose of Visit	Demographic Segment	Main Experiences Purchased
	Core	Opportunity	Investment/Watch			
Domestic	Nairobi Mombasa	Rest of Kenya		<ol style="list-style-type: none"> 1. VFR 2. Corporate 3. / Government 4. Leisure 	<u>Leisure:</u> Mid-high income residents; Groups/Families <u>Corporate/Government:</u> Adults, Over 30, Mid-high income, Tertiary Education	<ul style="list-style-type: none"> • Beach • Business • VFR • Nature/Wildlife (not Safari) • Events
EAC, SADC, Rest of Africa & Indian Ocean Islands	South Africa Tanzania Uganda	Rest of Africa		<ol style="list-style-type: none"> 1. Corporate 2. Government 3. Leisure 4. VFR 5. Other 	<u>Leisure:</u> High income residents; Couples / Small groups <u>Corporate/Government:</u> Adults, Over 35, Mid-High income, Tertiary Education, Individuals	<ul style="list-style-type: none"> • Business • Beach • VFR
Europe Americas Australasia Middle East	UK USA Germany Italy France China UAE	Rest of Europe, Americas, Australasia and Middle East		<ol style="list-style-type: none"> 1. Leisure (Holiday) 2. Business: Corporate 3. / Government / NGO/Aid Agencies 4. VFR 5. Other 	<u>Leisure:</u> High income residents; Couples / Small groups; Over 45 <u>NGO / Aid Agencies / Corporate/Government:</u> Adults, Over 35, Mid-High income, Tertiary Education, Individuals	<ul style="list-style-type: none"> • African Safari • Wildlife • Nature/Scenic • Beach



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Base or Existing Tourism Market Segmentation Grid for Kenya with Size of Market in Trips/Arrivals:

Market	Geographic Scope			Purpose of Visit	Demographic Segment	Main Experiences Purchased
	Core	Opportunity	Investment/Watch			
Domestic (13,4 mil trips) (92% of all arrivals/trips)	Nairobi Mombasa	Rest of Kenya		1. VFR 2. Corporate 3. / Government 4. Leisure	Leisure: Mid-high income residents; Groups/Families Corporate/Government:	<ul style="list-style-type: none"> Beach Business VFR Nature/Wildlife (not Safari) Events
EAC, SADC, Rest of Africa & Indian Ocean Islands (0,5 mil arrivals) (3% of all arrivals/trips)	South Africa Tanzania Uganda (123k) (27% of total regional arrivals)	Rest of Africa (326k) (73% of total regional arrivals)		1. Corporate 2. Government 3. Leisure 4. VFR 5. Other		Business Beach VFR
Europe Americas Australasia Middle East (0,7 mil arrivals) (5% of all arrivals/trips)	UK USA Germany Italy France China UAE (593k) (81% of total overseas arrivals)	Rest of Europe, Americas, Australasia and Middle East (140k) (19% of total overseas arrivals)		1. Leisure (H 2. Business: Corporate 3. / Government / NGO/ Aid Agencies 4. VFR 5. Other		<u>NGO / Aid Agencies / Corporate / Government: Adults, Over 35, Mid-High income, Tertiary Education, Individuals</u> <ul style="list-style-type: none"> African Safari Wildlife Nature/Scenic Beach

Breakdown unknown. Must be established by way of rigorous market research



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?



Segmentation Grid for Kenya with Suggested Growth Direction for "Improve Existing Phase" (Years 1-3):

Please note:
Out of 18 market segments in the grid, 9 are targeted for increased penetration, 3 for development and the remaining 7 for watch and react if necessary.

Market	Geographic Scope			Purpose of Visit	Demographic Segment	Main Experiences Purchased
	Core	Opportunity	Investment/Watch			
Domestic	Increase trips - deepen existing core segments	No change	No change	<ul style="list-style-type: none"> Increase business Increase leisure Leverage VFR 	<ul style="list-style-type: none"> No change 	<ul style="list-style-type: none"> Increase Beach Increase Business (travel & tourism) Expand Events
EAC, SADC, Rest of Africa & Indian Ocean Islands	Increase arrivals from existing core segments	No change	No change	<ul style="list-style-type: none"> Increase leisure Increase business tourism Increase existing other 	Expand to lower income segments	<ul style="list-style-type: none"> Increase Beach Introduce African Safari Introduce Other
Europe Americas Australasia Middle East	Increase arrivals from existing core segments	No change	No change	<ul style="list-style-type: none"> Increase leisure 	<ul style="list-style-type: none"> Expand to lower income segments Expand to lower age segments 	<ul style="list-style-type: none"> Increase Beach Increase African Safari (expand to outside of Migration Season) Increase Wildlife (expand to new locations) Increase Nature (expand to new locations)



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Suggested Growth Direction for “Grow & Diversify Phase” (Years 4-10) as well as “Maintain & Sustain Phase” (Years 11-13):

Market	Geographic Scope			Purpose of Visit	Demographic Segment	Main Experiences Purchased
	Core	Opportunity	Investment/Watch			
Domestic	Increase trips - deepen existing core segments & defend where necessary existing core segments	Develop Kisumu, Central and Rift Valley areas as source markets	Rest of Kenya excluding Core & Opportunity source markets no change	<ul style="list-style-type: none"> Increase and develop leisure Increase and develop business (MICE) Leverage VFR 	<ul style="list-style-type: none"> Develop lower income segments Develop group travel (school, church) 	<ul style="list-style-type: none"> Increase Beach Increase Business (travel & tourism) Develop Sport Develop Nature/Scenic Develop Wildlife Develop Adventure Develop City Break Develop Niche Expand Events
EAC, SADC, Rest of Africa & Indian Ocean Islands	Increase arrivals from existing core segments & defend where necessary existing core segments	Develop Nigeria, Ethiopia, Rwanda, Ghana	Rest of Africa excluding Core & Opportunity source markets no change	<ul style="list-style-type: none"> Increase leisure Increase business tourism Increase existing other Develop other 	<ul style="list-style-type: none"> Develop lower income segments Develop group travel Develop family market 	<ul style="list-style-type: none"> Increase Beach Develop African Safari/Wildlife Develop City Break Develop Niche Develop Events



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<p>Europe Americas Australasia Middle East</p>	<p>Increase arrivals from existing core segments & defend where necessary existing core segments</p>	<p>Develop, Australia, Canada, Netherlands, Spain & Scandinavia</p>	<ul style="list-style-type: none"> Invest in Russia and Japan Rest of overseas excluding Core and Opportunity source markets no change 	<ul style="list-style-type: none"> Increase and develop leisure Develop incentives Leverage VFR Leverage voluntourism 	<ul style="list-style-type: none"> Develop lower income segments Develop younger age segments Develop group travel Develop family market 	<ul style="list-style-type: none"> Increase Beach Increase African Safari (expand to outside of Migration Season) Increase Wildlife (expand to new locations) Increase nature & scenic (expand to new locations) Develop Adventure Develop Events Develop Sport
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Penetrate more (i.e. efforts should be made to improve market share)



Defend (i.e. efforts should be made to maintain market share)



Develop (i.e. efforts should be made to capture market share)



Watch (i.e. should be watched for future development)



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Sub-Thrust	Action Steps	Marketing Activity Cycle	KNTB2030 Strategic Approach Phase
2.2 Develop Targets for Recommended Market Segments	<ul style="list-style-type: none"> • Establish targets based on geographic source markets & linked to overall arrivals growth objectives • Establish broad expectations for core experience segments & for support/niche experience segments in a collective approach • Specify future target approach based on experience segments and identify the research required to be able to establish baselines for this approach • Undertake research to determine whether targets are accomplished & adjust segments and targets accordingly as required. (See Research Strategy) 	Research Monitor Adjust / Change	

Please note:
*This is to be carried out using the above Segmentation Grid Examples once segmentation research has been carried out and should tie back to the Growth Targets provided in **Objectives in Section 2 Strategic Direction** of the KNTB2030.*



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Strategic Thrust	
3. Key Directions in Market Distribution	Provide key directions in respect of marketing tools, marketing channels (particularly relating to intermediaries such as tour operators) and packaging.

Sub-Thrust	Action Plans	Marketing Activity Cycle	KNTB2030 Strategic Approach Phase
3.1 Develop Broad Recommendations for Marketing Tools	<ul style="list-style-type: none"> • Suggest primary marketing tools for the BEACH segment • Suggest primary marketing tools for the core AFRICAN SAFARI segment • Suggest primary marketing tools for the other CORE segments • Suggest primary marketing tools for the Niche segment as a whole • Communicate the marketing tools to public and private sector and monitor their usage of the tools and adjust accordingly if required. (See Institutional Framework & Research Strategy) 	Develop Communicate Research Monitor Change / Adjust	



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Tourism Marketing Tools & Segment Matrix for Kenya

The table below summarises the tourism marketing tools available, on a high or summarised level for context purposes. It also indicates which segments can be reached with these tools and the relative costs of using them and timeframe within which they can be mobilised or implemented. Out of the 17 marketing tools listed, for Kenya 10 are essential, 3 are somewhat essential and 4 are nice to have. Given the high number of Essential tools the marketing budget requirements to develop and utilise these tools would be substantial.

Marketing Tool	Segments Reached	Cost	Implementation Timeframe	Priority
Website	All segments	High once-off cost, also opportunity to generate advertising income	Short term& Continuous	Essential
Brochures & Maps	All segments	Medium	Short term& Continuous	Somewhat Essential (could be electronic not print)
Events Programme	Primarily Domestic but also other segments	Medium	Short term& Continuous	Essential
Public Relations	All segments	Low to Medium	Short term& Continuous	Essential
Sales Representatives (incl. Area/Country offices)	Primarily Foreign Tourists and to some extent Regional Tourists	High	Short to long term	Essential
Memberships/Registrations	All segments	Medium	Medium to long term	Nice to have
Electronic brochures	All segments, specifically travel intermediaries	High once-off cost, but relatively cheap to update and re-produce	Short to medium term& continuous	Essential
Joint Marketing	All segments	Medium	Continuous	Essential
Familiarisation trips/hostings & Workshops	Primarily travel intermediaries	Medium to high	Continuous	Essential
Merchandising	Domestic Tourists Foreign Tourists	Medium (also an opportunity for revenue, SMME development)	Medium to long term	Nice to have



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		and job creation)		
Direct Mail / e-mail / sms campaigns(need effective databases)	Special Interest Tourists (Niche) Domestic Event Tourists	E-mail costs time to send out and creation of database / costs of bulk sms	Medium term	Nice to have
Social media: Facebook, Twitter, Instagram, Flickr etc including Apps	All segments but high focus for Domestic & Regional	Low to medium but need to monitor continuously	Short term& Continuous	Essential
Building Relationships with Tour operators	Mainly foreign and domestic leisure tourists	Low to medium	Medium term& Continuous	Essential
Outdoor Promotion	Primarily Domestic	Medium	Medium term	Nice to have
Advertising Campaigns	Domestic Tourists	High	Medium term	Somewhat Essential
Tourism information offices (could be App based)	For Foreign and Domestic tourists but particularly domestic	High	Short to long term	Essential
Trade & Travel Shows (Exhibitions)	Foreign leisure tourists (trade) Domestic leisure tourists	High	Medium to long term	Somewhat Essential



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Tourism Marketing Tools by Experience Segment

The following three tables show the suggested primary marketing tools for each of the USP& Major Core experience market segments, by main geographic source, followed by a fourth table showing the primary tools for the niche markets.

Broad Recommendation of Marketing Tools: Suggested primary marketing tools for the core BEACH Experience

Core Experiences	Market	Primary Marketing Tool Recommendations	
1. Beach	Domestic	<ul style="list-style-type: none"> • Public Relations • Advertising campaigns • Events programme • Social Media 	<ul style="list-style-type: none"> • Website • Brochures & Maps; Electronic Brochures • Merchandising • Outdoor promotion
	Europe Americas Australasia Middle East	<ul style="list-style-type: none"> • Building Relationships with Tour operators • Joint Marketing Activities • Familiarisation trips/hostings & Workshops • Public Relations 	<ul style="list-style-type: none"> • Travel & Trade Shows • Website • Sales Representatives • Social Media
	EAC, SADC, Rest of Africa & Indian Ocean Islands	<ul style="list-style-type: none"> • Public Relations • Advertising campaigns • Events programme • Social Media 	<ul style="list-style-type: none"> • Website • Brochures & Maps; Electronic Brochure • Direct Mail / e-mail / sms campaigns



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Broad Recommendation of Marketing Tools: Suggest primary marketing tools for the core NATURE & SCENIC BEAUTY Experiences

Core Experiences	Market	Primary Marketing Tool Recommendations	
2. Nature & Scenic Beauty	Domestic	<ul style="list-style-type: none"> • Public Relations • Website • Brochures & Maps; Electronic Brochures 	<ul style="list-style-type: none"> • Events programme • Advertising campaigns • Social Media
	Europe Americas Australasia Middle East	<ul style="list-style-type: none"> • Public Relations • Website • Social Media • Sales Representatives 	<ul style="list-style-type: none"> • Building Relationships with Tour operators • Travel & Trade Shows • Joint Marketing Activities • Familiarisation trips/hostings & Workshops
	EAC, SADC, Rest of Africa & Indian Ocean Islands	<ul style="list-style-type: none"> • Public Relations • Website • Brochures & Maps; Electronic Brochures 	<ul style="list-style-type: none"> • Events programme • Advertising campaigns • Social Media



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Broad Recommendation of Marketing Tools: Suggest primary marketing tools for the core AFRICAN SAFARI & WILDLIFE Experiences

Core Experiences	Market	Primary Marketing Tool Recommendations	
3. African Safari & Wildlife	Domestic	<ul style="list-style-type: none"> Public Relations Website Brochures & Maps; Electronic Brochures 	<ul style="list-style-type: none"> Events programme Advertising campaigns Social Media
	Europe Americas Australasia Middle East	<ul style="list-style-type: none"> Public Relations Website Social Media Sales Representatives 	<ul style="list-style-type: none"> Building Relationships with Tour operators Travel & Trade Shows Joint Marketing Activities Familiarisation trips/hostings & Workshops
	EAC, SADC, Rest of Africa & Indian Ocean Islands	<ul style="list-style-type: none"> Public Relations Website Brochures & Maps; Electronic Brochures 	<ul style="list-style-type: none"> Events programme Advertising campaigns Social Media



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Broad Recommendation of Marketing Tools: Suggest primary marketing tools for the Other Core & Niche experiences collectively

Core Experiences	Market	Primary Marketing Tool Recommendations	
All Collectively • Culture / heritage • City break • Adventure • Business Tourism (MICE) & Events • Sport • Avi-tourism or Birding • Cruise tourism • Medical • Agri-tourism • Desert	Domestic	<ul style="list-style-type: none"> • Website • Direct Mail / e-mail / sms campaigns • Events programme • Public Relations • Memberships/Registrations 	<ul style="list-style-type: none"> • Building Relationships with Tour operators/Trade & Joint Marketing Activities • Trade & Travel Shows (primarily consumer shows) • Targeted Advertising campaigns (primarily print media)
	Europe Americas Australasia Middle East	<ul style="list-style-type: none"> • Memberships/Registrations • Building Relationships with Tour operators/Trade • Joint Marketing Activities • Events Programme 	<ul style="list-style-type: none"> • Familiarisation trips/hostings & Workshops • Direct Mail / e-mail / sms campaigns • Public Relations • Travel & Trade Shows • Website
	EAC, SADC, Rest of Africa & Indian Ocean Islands	<ul style="list-style-type: none"> • Website • Direct Mail / e-mail / sms campaigns • Events programme • Public Relations 	<ul style="list-style-type: none"> • Building Relationships with Tour operators/Trade & Joint Marketing Activities • Targeted Advertising campaigns (primarily print media) • Memberships/Registrations

Sub-Thrust	Action Plans	Marketing Activity	KNTB2030
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...marketing strategic direction

		Cycle	Strategic Approach Phase
3.2 Broad Recommendations for Marketing Channels to Support the Experience Segmentation Approach	<ul style="list-style-type: none"> • Broad channel recommendations for BEACH segment • Broad channel recommendations for NATURE & SCENIC BEAUTY segment • Broad channel recommendations for core AFRICAN SAFARI & WILDLIFE segment • Broad channel recommendations for Other Core and for Niche segments as a whole • Communicate the marketing channels to public and private sector and monitor their usage of the channels and adjust accordingly if required. (See Institutional Framework & Research Strategy) 	Develop Communicate Research Monitor Change / Adjust	



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Channel Recommendations – Beach experience

Core Experiences	Market	Broad Channel Recommendations
1. Beach	Domestic	<ul style="list-style-type: none"> Established domestic beach market - primary channel would be directly with product owners Reverting domestic beach market going elsewhere in Africa – work with established outbound tour operators and travel agents Emerging domestic beach market – establish dedicated domestic tour operator for Kenya or team up with existing Kenya tour operators to deliver tour operators service for this market segment
	Europe Americas Australasia Middle East	<ul style="list-style-type: none"> Develop relationships/advertise in brochures of dedicated international large outbound beach tour operators, particularly the large operators such as TUI, etc Strengthen existing relationships with niche international outbound tour operators that handle the East African destinations to also include beach offerings for Kenya Strengthen relationships with existing Kenya inbound tour operators to also include beach offerings for Kenya
	EAC, SADC, Rest of Africa & Indian Ocean Islands	<ul style="list-style-type: none"> Strengthen relationships with airlines into and out of Africa to strengthen the channel in Africa Relationship not trade (tour and travel operator related) but rather direct between consumer and product owner or strictly promotional channel only.



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Channel Recommendations – Nature & Scenic Beauty experience

Core Experiences	Market	Broad Channel Recommendations
2. Nature & Scenic Beauty	Domestic	<ul style="list-style-type: none"> Established domestic market - primary channel would remain directly with product owners thus strictly promotional channel only
	Europe Americas Australasia Middle East	<ul style="list-style-type: none"> Strengthen existing relationships with niche international outbound tour operators that handle the East African destinations to expand on scenic/natural beauty/mountain offerings for Kenya Strengthen relationships with existing Kenyan inbound tour operators to expand scenic/natural beauty/mountain offerings for Kenya
	EAC, SADC, Rest of Africa & Indian Ocean Islands	<ul style="list-style-type: none"> Strengthen relationships with airlines into and out of Africa to strengthen the channel in Africa Relationship not trade (tour and travel operator related) but rather direct between consumer and product owner or strictly promotional channel only.



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Channel Recommendations – African Safari & Wildlife Experience

Core Experiences	Market	Broad Channel Recommendations
3. African Safari & Wildlife	Domestic	<ul style="list-style-type: none"> Established domestic market - primary channel would remain directly with product owners thus strictly promotional channel only
	Europe Americas Australasia Middle East	<ul style="list-style-type: none"> Strengthen existing relationships with niche international outbound tour operators that handle the East African destinations to expand on Safari and wildlife offerings for Kenya Strengthen relationships with existing Kenyan inbound tour operators to expand Safari and wildlife offerings for Kenya
	EAC, SADC, Rest of Africa & Indian Ocean Islands	<ul style="list-style-type: none"> Strengthen relationships with airlines into and out of Africa to strengthen the channel in Africa Relationship not trade (tour and travel operator related) but rather direct between consumer and product owner or strictly promotional channel only.



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Channel Recommendations – Other Core & Niche Experiences

Core Experiences	Market	Broad Channel Recommendations
4. Niche All Collectively • Culture / heritage • City break • Adventure • Business Tourism (MICE) & Events • Sport • Avi-tourism or Birding • Cruise tourism • Medical • Agri-tourism • Desert	Domestic	<ul style="list-style-type: none"> Establish direct channels with niche associations, product owners, etc. Strictly promotional channel only.
	Europe Americas Australasia Middle East	<ul style="list-style-type: none"> Strengthen existing relationships with niche international outbound tour operators that handle the East African destinations to expand on other core and niche offerings for Kenya Strengthen relationships with existing Kenyan inbound tour operators to expand other core and niche offerings for Kenya
	EAC, SADC, Rest of Africa & Indian Ocean Islands	<ul style="list-style-type: none"> Establish direct channels with niche associations, product owners, etc. Strictly promotional channel only.

Sub-Thrust

Action Plans

Marketing

KNTB2030



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		Activity Cycle	Strategic Approach Phase
3.3 Broad Recommendations for Safety & Security Marketing Actions	<ul style="list-style-type: none"> • Add a safety & security page on the tourist and trade website (Safety Advisory page) (KTB and Magical Kenya sites). Request that all product owner, trade associations and other tourism websites be linked to these Safety & Security Advisory pages as the central messaging portal. However, product owner, trade association and other tourism websites can still carry safety and security information pertinent to their location. • Link this Advisory to all social media. • Ensure that the Safety Advisory page contain contact information for the Tourism Protection services. • Keep this Safety Advisory page regularly updated with latest safety and security information, tips and notifications. Pre-develop safety advisory messages to advice on tourist safety in crisis times as well as non-crisis times. • Develop and implement a PR strategy that deals with safety and security message distribution in both crisis times as well as non-crisis times (with Media in Kenya and outside). Develop relationships with specific media that can be relied upon to carry prepared messages without change. • Undertake a local media awareness campaign to instil a responsible attitude to reporting around safety and security incidents. • Undertake an awareness campaign with the trade (and trade associations) to instil a responsible attitude to their advisory to guests and tourists around safety and security 	Develop Communicate Research Monitor Change / Adjust	



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	<p>incidents and to ensure linkage to the central Advisory portal. This is to ensure consistency in reporting and information.</p> <ul style="list-style-type: none">• Create an operate a Crisis Management PR task team for marketing and communication purposes encompassing Ministry, RTC Tourism Officials, KTB and Trade Associations.• Develop a report on foreign country advisory status for Kenya. Monitor this continuously.• Continuously interact with the relevant foreign government departments to lobby for the lifting or decreasing the intensity of their travel advisories on Kenya.• Collect and scan for statements/testimonials from existing visitors to Kenya on their safe travel experiences in Kenya and use for pushing to social media and other platforms/collateral.		
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Strategic Thrust	
4. Key Directions for Marketing Budgets	Provide key directions in respect of the marketing budget allocation by geographic market and by NTB2030 Strategic Phase.



Geographic Segmentation Grid for Kenya with Suggested Application of Market Budgets for “Improve Existing Phase” (Years 1-3):

Market	Geographic Scope	
	Core	Watch & React
Domestic (20% of total budget)	Nairobi Mombasa <i>(70% of domestic budget)</i>	Rest of Kenya <i>(30% of domestic budget)</i>
EAC, SADC, Rest of Africa & Indian Ocean Islands (20% of total budget)	South Africa Tanzania Uganda <i>(50% of regional budget)</i>	Rest of Africa <i>(50% of regional budget)</i>
Europe Americas Australasia Middle East (60% of total budget)	UK USA Germany Italy France China UAE <i>(80% of overseas budget)</i>	Rest of Europe, Americas, Australasia and Middle East <i>(20% of overseas budget)</i>



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Geographic Segmentation Grid for Kenya with Suggested Application of Market Budgets for “Diversify & Maintain/Sustain Phases” (Years 4-13):

Market	Geographic Scope		
	Core	Opportunity	Investment/Watch
Domestic (30% of total budget)	Nairobi Mombasa <i>(50% of domestic budget)</i>	Kisumu Rift Valley <i>(20% of domestic budget)</i>	Rest of Kenya not in Core or Opportunity Source Markets <i>(30% of domestic budget)</i>
EAC, SADC, Rest of Africa & Indian Ocean Islands (25% of total budget)	South Africa Tanzania Uganda <i>(40% of regional budget)</i>	Nigeria Ethiopia Rwanda Ghana <i>(40% of domestic budget)</i>	Rest of Africa not in Core or Opportunity Source Markets <i>(20% of regional budget)</i>
Europe Americas Australasia Middle East (45% of total budget)	UK USA Germany Italy France China UAE <i>(50% of overseas budget)</i>	Australia Canada Netherlands Spain Scandinavia <i>(40% of domestic budget)</i>	Japan Russia & surroundings Rest of Europe, Americas, Australasia and Middle East not in Core or Opportunity Source Markets <i>(10% of overseas budget)</i>



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6.5 Prioritisation of Marketing Thrusts & Sub-Thrusts

The strategic thrusts have been prioritised based on the likely impact of the strategic thrusts on visitor demand and has been scored as follows:

Likely Impact on Visitor Demand – Score out of 3
High = 3/3
Medium = 2/3
Low = 1/3

The priority ratings are provided on a scale of 1-3 as follows:

Priority rating key:



= High priority



= Medium priority



= Low priority



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Prioritisation of Strategic Thrusts for Marketing Strategy

Strategic Thrusts	Sub-Thrusts	Rating of Likely Impact on Visitor Demand	Priority Rating
Aligned & Integrated Tourism Branding & Positioning	• Identification & Market readiness assessment of tourism experiences	HIGH = 3/3	1
	• Refresh of existing Magical Kenya branding	HIGH = 3/3	1
	• Alignment of tourism branding	MEDIUM = 2/3	2
	• Regional branding & positioning	LOW = 1/3	3
	• Use of branding by Counties	LOW = 1/3	3
	• Use of branding by Private Sector	LOW = 1/3	3
Tourism Market Segmentation Directions	• Market segment recommendations and prioritisation thereof	MEDIUM = 2/3	2
	• Recommendations iro targets per market segment	MEDIUM = 2/3	2
Tourism Marketing Distribution Directions	• Recommendations in respect of marketing tools	MEDIUM = 2/3	2
	• Recommendations in respect of marketing channels	MEDIUM = 2/3	2
Tourism Marketing Budget Allocation	• Budget Allocation by Geographic Market	HIGH = 3/3	1



SECTION 7
HR Strategy



National Tourism Blueprint 2030

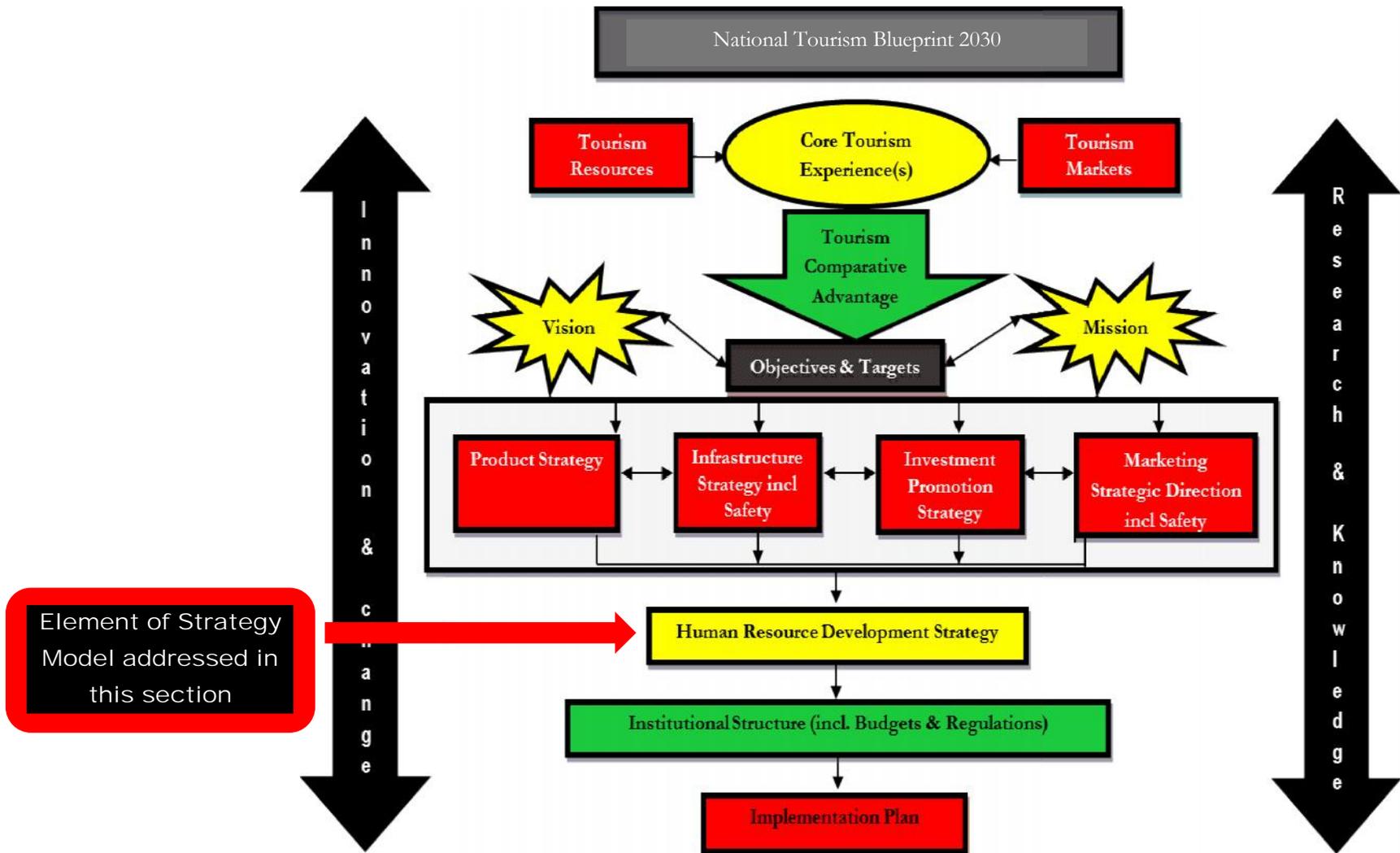
Human Resource Strategy

September 2017

Section 7
Detailed Strategy
Human Resource Strategy

Overview
Preliminaries
1. Introduction & Approach
2. Innovation and Change & Strategic Direction
3. Detailed Strategy – Product Strategy
4. Detailed Strategy – Infrastructure Strategy
5. Detailed Strategy – Investment Promotion Strategy
6. Detailed Strategy – Marketing Strategic Direction
7. Detailed Strategy – Human Resource Strategy
8. Detailed Strategy – Research and Knowledge Management Strategy
9. Detailed Strategy – Institutional Structure





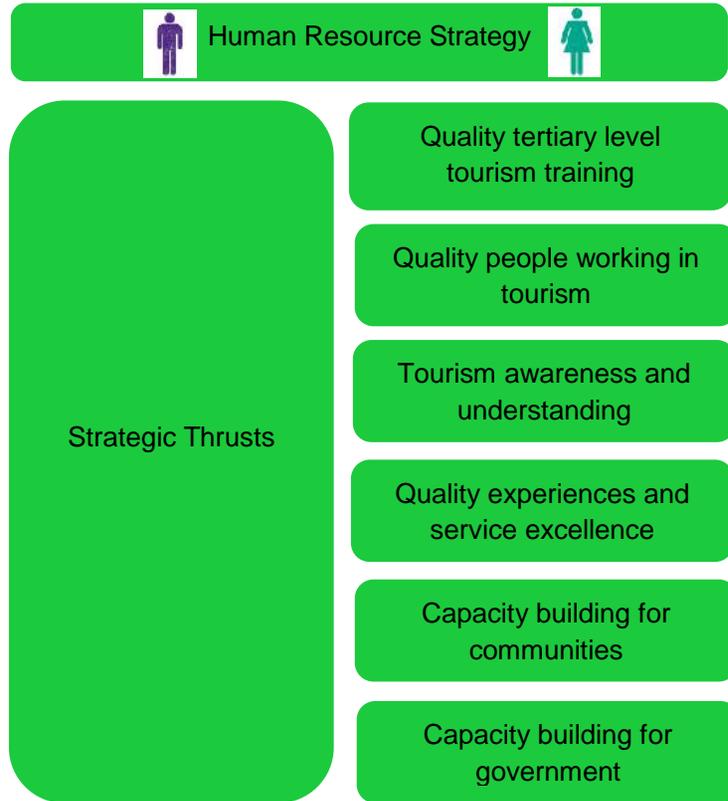
7. Human Resource Strategy

7.1 Introduction

This strategy relates to the development of human capital within the tourism sector. Human resource development is required in order to strengthen the skills base of the tourism sector in Kenya and there needs to be priority placed on providing relevant training and capacity building in line with industry needs. The strategy provides strategic actions to improve perceptions of the tourism sector as a career path of choice and as an economic sector that provides benefits to Kenyan people in general (this is dealt with under tourism awareness and understanding).



7.2 Strategic Thrusts



Strategic Thrusts	Strategic Actions
Quality tertiary level training	<ol style="list-style-type: none"> 1. Conduct a national tourism skills audit 2. Conduct a national tourism training institutions audit and assess the need to rationalise the number of institutions that offer tourism training 3. Conduct a national review of tourism training curricula 4. Formulate a national tourism human resource development strategy that must also include: <ol style="list-style-type: none"> a. Identification of scarce and critical skills required by the industry and strategic interventions to address these b. Identification of complementary skills required for tourism, e.g. marketing, accounting etc. and strategic interventions to address these 5. Formulate minimum standards for tourism and hospitality training courses, including making practical training compulsory for all tourism students 6. Establish mechanisms for tourism training institutions and the tourism industry to engage 7. Set minimum entrance requirements for tourism students 8. Set minimum requirements for tourism trainers 9. Conduct regular curricula reviews 10. Develop relevant refresher and short courses 11. Clarify and refine the roles of the relevant Ministries and institutions responsible for tourism training accreditation 12. Improve access to funding for tourism studies 13. Re-establish Kenya Utalii College as a centre of training excellence 14. Stimulate post-graduate studies in tourism 15. Create partnerships with internationally renowned tourism and hotel schools
Quality people working in tourism	<ol style="list-style-type: none"> 1. Set standards for continuous professional development 2. Develop relevant refresher and short courses



Strategic Thrusts	Strategic Actions
	<ol style="list-style-type: none"> 3. Create mechanisms for self-assessment of skills by industry professionals 4. Develop and implement tourism mentorship programmes 5. Recognise talent through an industry awards programme 6. Develop and implement enterprise support programmes 7. Develop and implement tour/driver guide training programmes
Tourism awareness and understanding	<ol style="list-style-type: none"> 1. Develop and implement tourism awareness programmes for Kenyans 2. Develop and implement tourism awareness programmes for school learners 3. Develop and implement tourism awareness programmes for the media 4. Develop and implement tourism awareness programmes for immigration officials 5. Develop and implement tourism awareness programmes for government – see ‘Capacity building for government’ strategic thrust 6. Incorporate tourism as a school subject (either stand alone or within other subjects) 7. Promote tourism as a career of choice 8. Raise the profile of tourism at government level 9. Promote the benefits of tourism through sound market and economic research
Quality experiences and service excellence	<ol style="list-style-type: none"> 1. Develop and implement a tourism industry awards programme for facilities, services and people in the tourism industry 2. Develop and implement a tourism service excellence training programme 3. Develop and implement a mystery guest programme 4. Ensure that people in tourism are passionate and adequately trained/skilled to work in the industry – see ‘Quality tertiary level training’ and ‘Quality people working in tourism’ strategic thrusts
Capacity building for communities	<ol style="list-style-type: none"> 1. Conduct an audit of existing community-based tourism projects to identify skills-related challenges and support requirements



Strategic Thrusts	Strategic Actions
	<ol style="list-style-type: none">2. Provide training for local communities on the basics of tourism and running a tourism business3. Develop and implement a mentorship/coaching programme to match industry experts with community-based tourism projects
Capacity building for government	<ol style="list-style-type: none">1. Conduct an assessment of tourism-related skills availability/quality at County level2. Set minimum job specifications and requirements for tourism officials3. Promote the benefits of tourism through sound market and economic research4. Develop a programme to train County officials and politicians on the basics of tourism5. Develop a programme to train government officials that interact with the tourism industry/tourists on the basics of tourism, e.g. museum curators, immigration officials, Kenya Wildlife Service entrance gate staff etc.



SECTION 8

Research & Knowledge Management



National Tourism Blueprint 2030

Research & Knowledge Management Strategy

September 2017

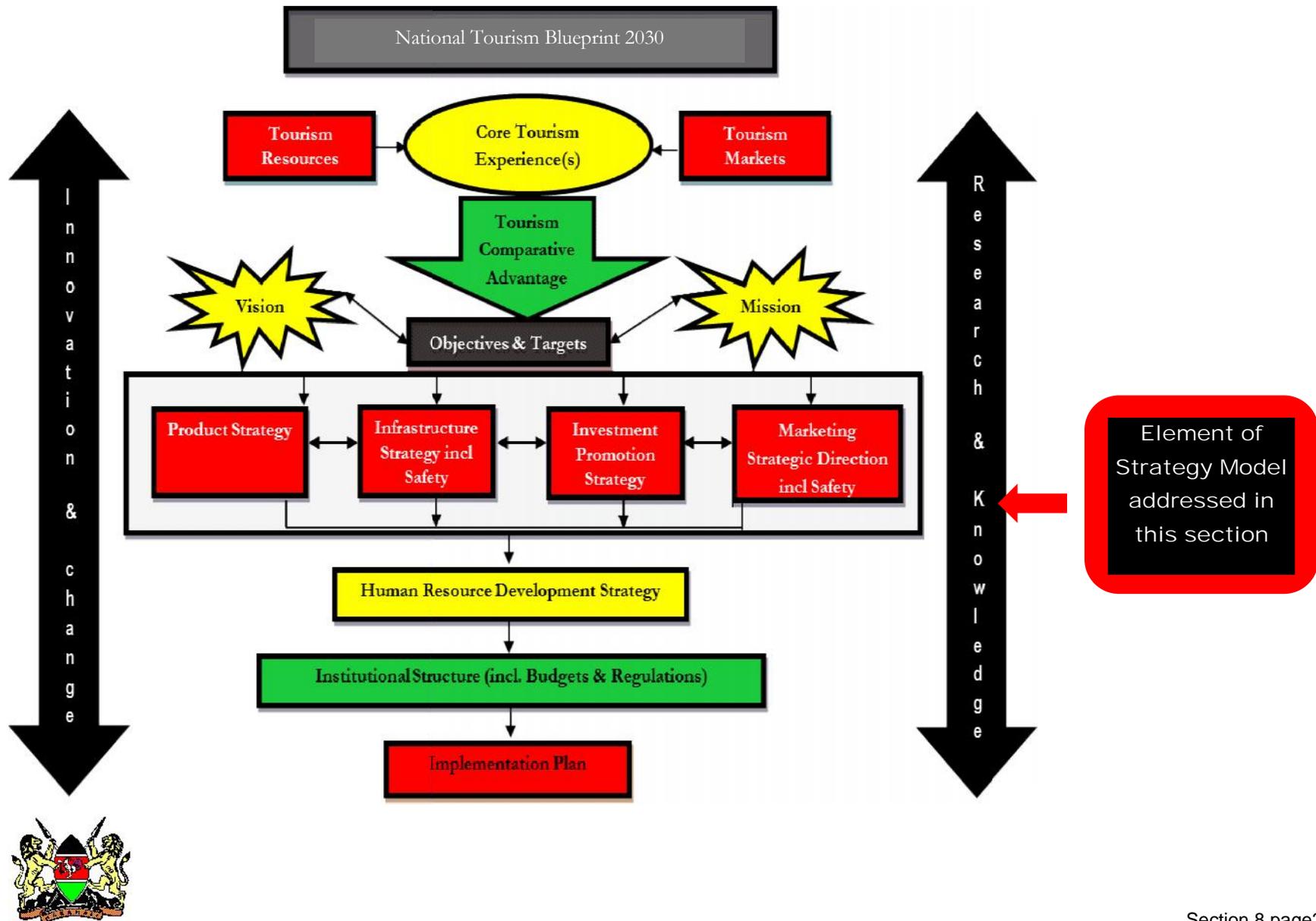
Section 8
Research & Knowledge
Management Strategy

Overview

Preliminaries

- 1. Introduction & Approach**
- 2. Innovation and Change & Strategic Direction**
- 3. Detailed Strategy – Product Strategy**
- 4. Detailed Strategy – Infrastructure Strategy**
- 5. Detailed Strategy – Investment Promotion Strategy**
- 6. Detailed Strategy – Marketing Strategic Direction**
- 7. Detailed Strategy – Human Resource Strategy**
- 8. Detailed Strategy – Research and Knowledge Management Strategy**
- 9. Detailed Strategy – Institutional Structure**





8. Research & Knowledge Management Strategy

8.1 Introduction

It is imperative that meaningful, ongoing research is conducted on visitors to Kenya, as well as on the tourism industry. It is acknowledged that investment into the industry must be underpinned by sound research to ensure that appropriate investments are made into the sector. This strategy has the following objectives:

- To provide timely meaningful information and analyses to stakeholders in the tourism sector;
- To provide efficient knowledge and database management systems for the tourism sector; and
- To provide measurements to track progress on targets and objectives and the performance of the industry.

8.2 Strategic Thrusts



...research & knowledge management strategy

Strategic Thrusts	Strategic Actions
Market (visitor) research	<ol style="list-style-type: none"> 1. Capacitate the relevant institutions to conduct tourism research 2. Obtain inputs from the tourism industry on their information requirements in terms of visitor research 3. Develop a co-ordinated research plan to conduct visitor research on visitors to Kenya 4. Collect information on visitor satisfaction levels through visitor surveys 5. Commission ad hoc research studies on pertinent market research topics
Tourism industry research	<ol style="list-style-type: none"> 1. Fund and support academic and applied research into the industry 2. Obtain inputs from the tourism industry on their information requirements in terms of industry research 3. Set requirements for feasibility studies for major tourism infrastructure development projects that require government support 4. Encourage the tourism industry to conduct feasibility studies before developing new tourism products 5. Track the latest tourism trends by obtaining and reviewing the latest tourism industry research conducted internationally
Knowledge management and information dissemination	<ol style="list-style-type: none"> 1. Enforce registration of all tourism businesses in Kenya as per the Tourism Act 2. Finalise a comprehensive tourism supply database 3. Conduct regular and ongoing updates and maintenance of the tourism supply database 4. Create an online platform to store research on the tourism industry 5. Establish mechanisms to share information and research between government entities/departments and with the tourism industry 6. Establish mechanisms to share information with academic institutions 7. Develop annual tourism research plans with clear budgets and responsibilities 8. Conduct detailed analysis of available visitor and tourism industry research and disseminate the findings to the industry



...research & knowledge management strategy

Strategic Thrusts	Strategic Actions
Monitoring and evaluation	<ol style="list-style-type: none">1. Monitor visitor satisfaction through satisfaction surveys and monitoring customer feedback websites such as Trip Advisor2. Develop a research programme and impact assessments to monitor and measure the attainment of targets and objectives3. Develop a research programme to monitor the pricing of tourism products and packages in Kenya compared to selected competitor destinations, i.e. basket of goods benchmarking.



SECTION 9
Institutional Strategy



National Tourism Blueprint 2030

Institutional and Stakeholder Strategy

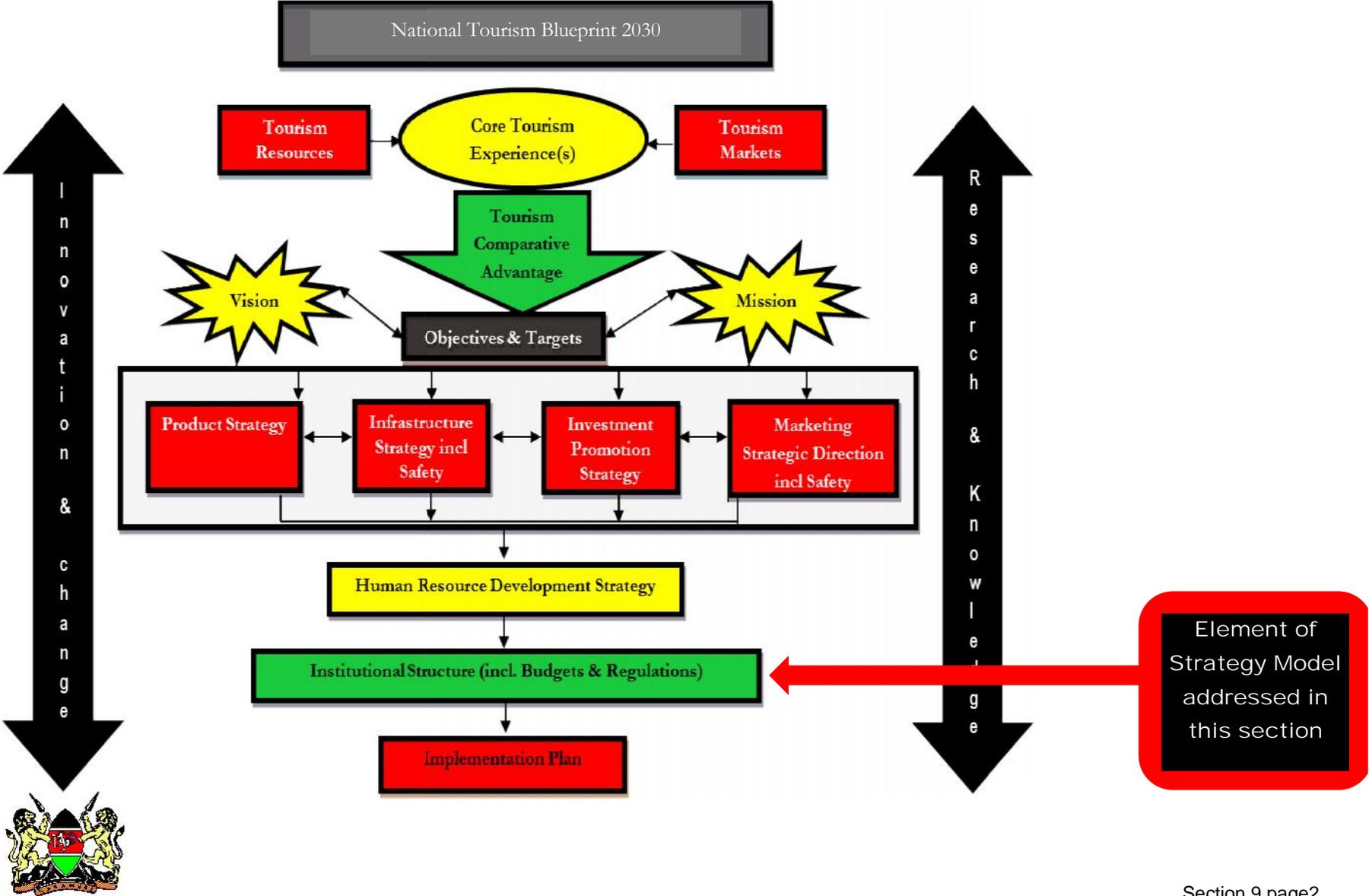
September 2017

Section 9
Detailed Strategy
Institutional Structure

Overview
Preliminaries
1. Introduction & Approach
2. Innovation and Change & Strategic Direction
3. Detailed Strategy – Product Strategy
4. Detailed Strategy – Infrastructure Strategy
5. Detailed Strategy – Investment Promotion Strategy
6. Detailed Strategy – Marketing Strategic Direction
7. Detailed Strategy – Human Resource Strategy
8. Detailed Strategy – Research and Information Management Strategy
9. Detailed Strategy – Institutional Structure

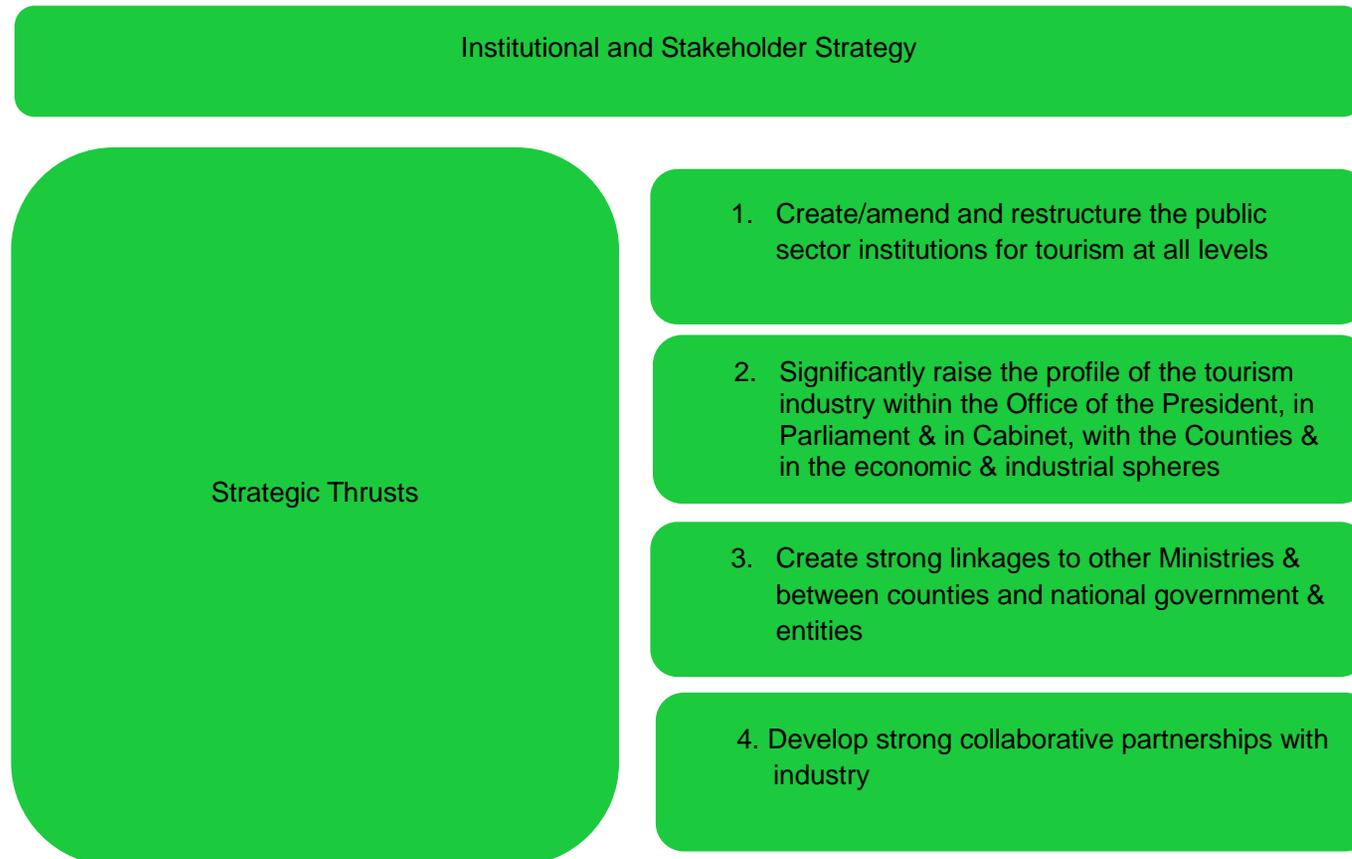


...institutional structure



9. Institutional and Stakeholder Structure

9.1 Institutional Structure Strategic Thrusts Summarised



9.2 Thrust 1 - Create & Amend & Restructure the Public Sector Institutions

Figure 9.1 depicts in summarised form, the proposed national public sector institutional structure for tourism in Kenya, in order to efficiently implement the strategy. This structure is described below.

The key principles applied in the institutional structure are to:

- follow best or newest practice
- to avoid duplication of governance and support structures across multiple entities
- to ensure good governance of tourism entities with attention to fiduciary duties of directors and independence principles.
- to avoid overlap and fragmented or duplicated approach to interventions outside of a single agreed framework
- to draw on centralised expertise such as in investment promotion and development finance, as opposed to sector specific entities which repeat the expertise in isolation. This does not preclude tourism specialisation in such centralised entities, but it exploits generic skills and avoids additional governance and support structures.
- Publically operated tourism facilities should be preferably at county level, or preferably operated in PPP arrangements, and as a last choice be in a parastatal with reasonable autonomy. The core functions of a national tourism department should not be to operate tourism facilities.

In addition capable, strong and passionate leadership for tourism departments and entities is essential to ensure that the strategy is implemented at all levels.

9.2.1 National

9.2.1.1 Ministry and State Department of Tourism

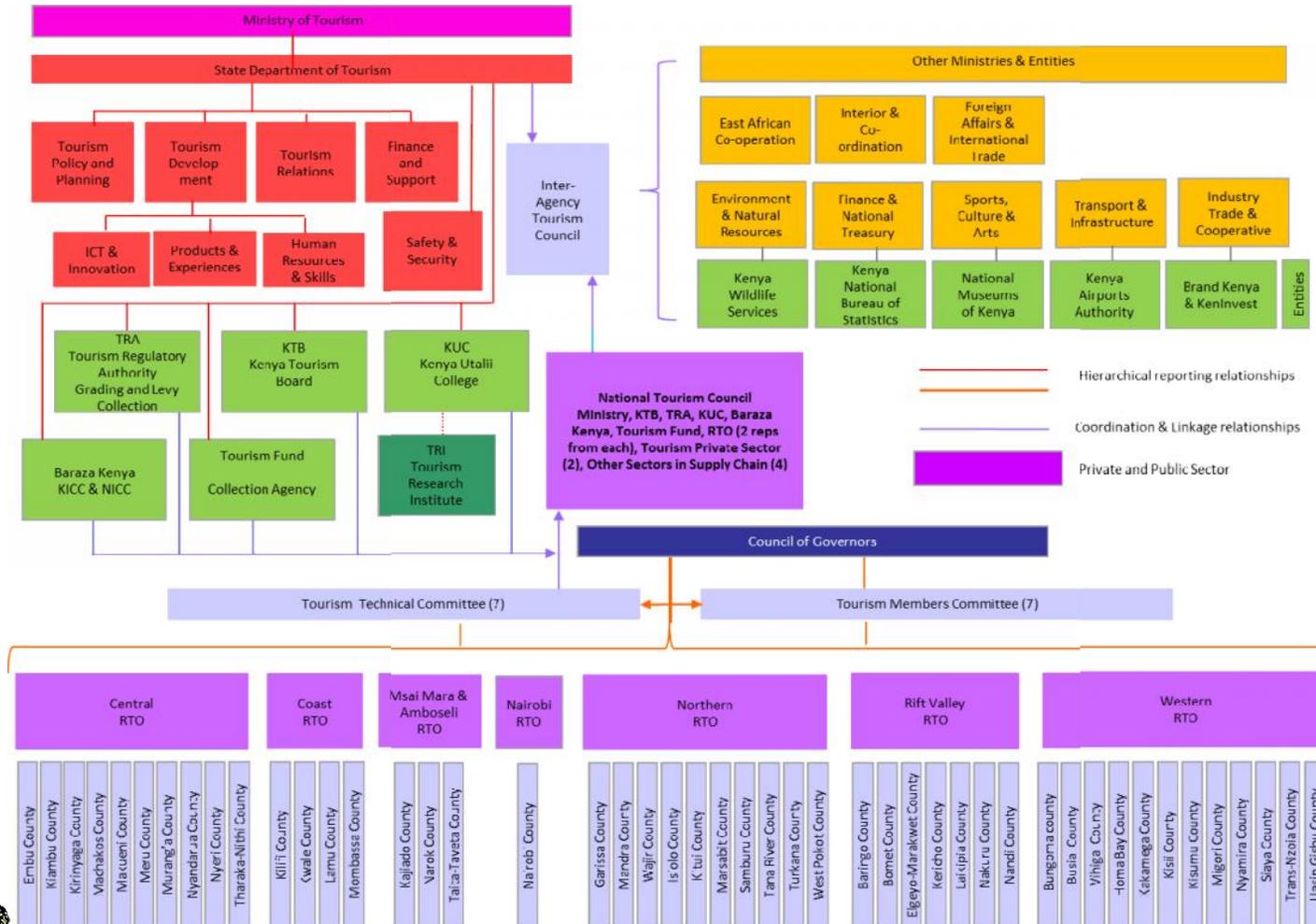
The key national tourism structures are the Ministry of Tourism and Wildlife, and the State Department of Tourism.

The State Department of Tourism will be organized in the following four directorates:

1. Tourism Policy and Promotion
2. Tourism Development and Innovation
3. Tourism Relations and Communication
4. Tourism Investment and Finance

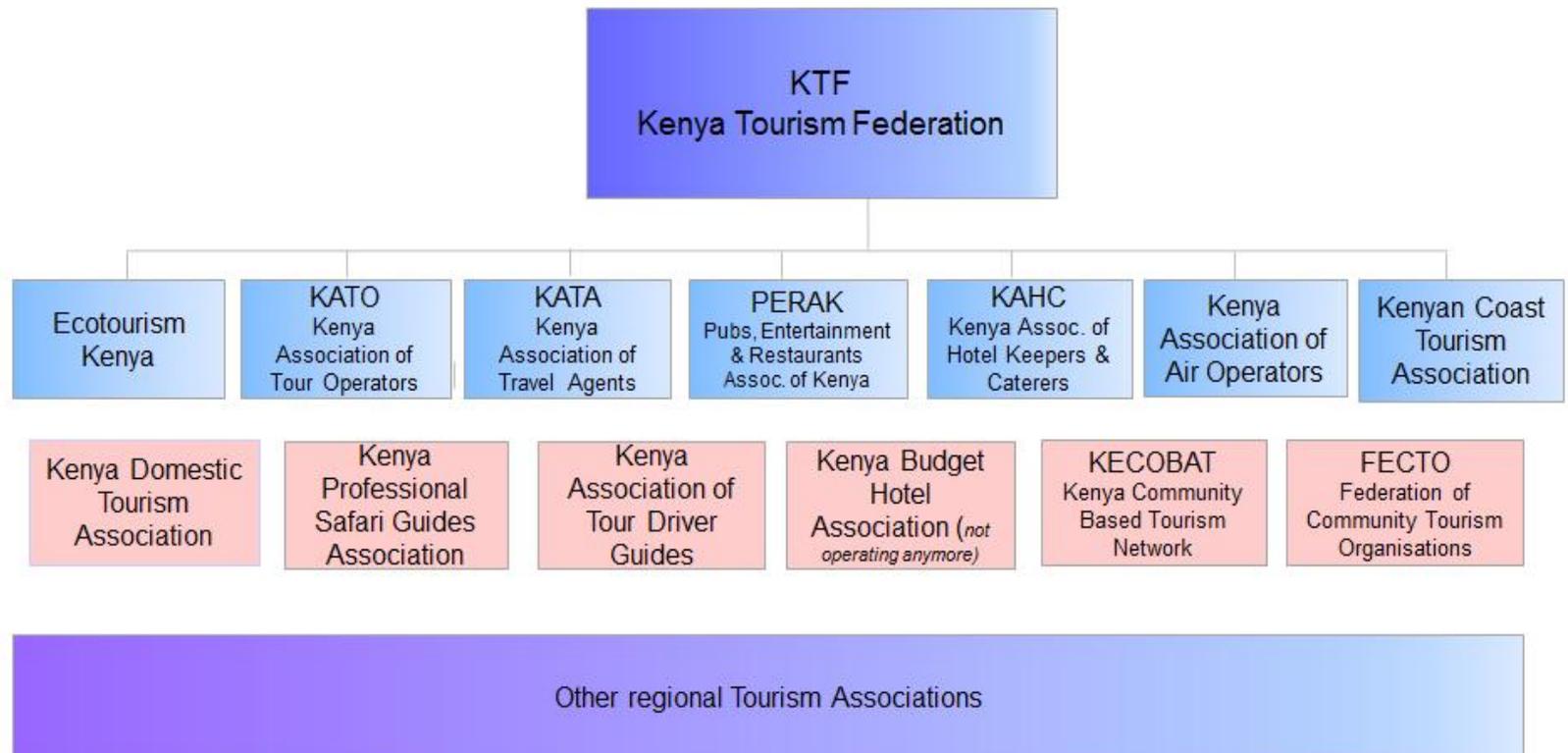


Figure 9.1 Kenya Tourism Institutional Structure



Private Sector

- Strengthen private sector associations
- Structure is appropriate



...institutional structure

The State Department of Tourism will be responsible for the following functions:

- Formulation and implementation of National Tourism policy, legislation and strategy
- Development and implementation of National Tourism Blueprint 2030
- Facilitation of development of viable tourism products and services equitably countrywide across the supply chain
- Development of National Tourism Marketing Strategy
- Coordination of National, Regional and International relations, agreements and protocols in tourism
- Promotion of safety and security of tourists
- Development and enforcement of tourism standards and code of practice.
- Development of tourism human capital
- Promotion and adoption of innovative practices and transfer of technology for tourism competitiveness
- Supporting and facilitation of research and knowledge sharing in tourism

The Tourism Policy and Promotion Directorate will be responsible for:

- Formulation and Implementation of National Tourism Policies, Plans and Strategies
- Development and Implementation of Tourism Legislation
- Development and Implementation of the National Tourism Blueprint
- Promotion of Kenya as a premier tourist destination
- Set national goals, targets and indicators for sustainable tourism development
- Development of tourism standards, norms and guidelines
- Development of tourism programmes and projects
- Development and Implementation of five year Tourism Strategy
- Development and Implementation of tourism partnerships

The Directorate will be divided into four Divisions namely:

- Tourism Policy
- Tourism Planning and Strategy
- Tourism Safety and Security
- Tourism Promotion



...institutional structure

The Tourism Relations and Communication Directorate will be responsible for:

- Development and implementation of bilateral Memorandums of Understanding (MoUs) and agreements of cooperation between Kenya and other partner states in the field of tourism
- Development and implementation of multilateral agreements in tourism
- Establishment and support of strategic linkages with sector stakeholders
- Coordination of Kenya's regional tourism engagements (EAC, COMESA, NEPAD, IGAD etc.)
- Facilitation and coordination of the international and local tourism negotiations
- Management of relations with the United Nations World Tourism Organisation
- Development and implementation of tourism related statutes, Protocols, treaties and conventions
- Coordination and monitoring of the implementation of county tourism engagements

The Directorate will have four Divisions namely:

- United Nations World Tourism Organization Division
- Tourism Bilateral and Regional Agreements Division
- Communication and Technology Division
- County and Stakeholders Liaison Division

The Tourism Development and Innovation Directorate will be responsible for:

- Promotion of the development of diverse tourism product across the supply chain
- Promotion of tourism product diversification
- Identification of gaps in tourism product mix and service delivery
- Promotion of tourism flagship projects
- Development of Kenya's tourism product directory
- Promotion of the transfer of technologies for competitive development of tourism products and services
- Coordination of the development of appropriate tourism product mix
- Development and implementation of service excellence standards
- Support and inspire tourism product innovation and change
- Promotion of the development of relevant human capital for the tourism sector



...institutional structure

The Directorate will be divided into three divisions, namely:

- Innovation and Change Division
- Product Experience Division
- Human Capital Development Division

The Tourism Investment and Finance Directorate will be responsible for:

- Profiling and promotion of investment opportunities in the tourism sector
- Development and implementation of frameworks for tourism partnerships and entrepreneurship
- Development and implementation of tourism incentives and disincentives schemes
- Development and Implementation of special financing schemes for the tourism sector
- Offering business and investment advisory services for tourism development
- Development, implementation and promotion of programmes and initiatives that use the Funds established under Tourism (Tourism Transformation Fund, Tourism Fund, Refurbishment Fund, etc)

The Directorate will be divided into two divisions, namely:

- Investment Division
- Finance Division

The Meetings, Incentives, Conventions, and Exhibitions (MICE) Bureau will be responsible for:

- Promotion of Kenya as a business tourism destination
- Coordination and monitoring the implementation of business tourism strategy
- Coordination and support of the bidding process for tourism stakeholders
- Advising on and promotion of appropriate (and appropriateness of) MICE infrastructure
- Coordination of the dissemination of MICE tourism information and research

The Directorate will be divided into three divisions, namely:

- Business Development and Bidding Division
- Marketing and Public Relations Division
- Supply Chain Division



...institutional structure

The department's detailed organogram will be developed in relation to providing the above functions, but it is envisaged it will not exceed around 297 positions.

9.2.1.2 Inter-agency Tourism Council

Tourism is a multifaceted industry which requires coordination across numerous ministries as well as with other national government entities.

The Ministry of Tourism and Wildlife will convene and chair an inter-agency tourism council, which includes all the key entities and national departments which impact and/or are impacted by tourism. A representative from the President's office should also sit on the committee.

9.2.1.3 Tourism Entities

Entities and their Mandates

There are 9 national tourism entities or parastatals which fall under the ministry, eight of which are created through the Tourism Act. The Bomas of Kenya is the exception to this. Two of the entities are tourism facilities which trade, viz Bomas of Kenya and the Kenyatta International Convention Centre ("KICC").

Conclusion:

There will be five national tourism entities under the Department of Tourism viz:

- The **Tourism Regulatory Authority** – registration, categorisation, licensing, & grading
- The **Tourism Fund** – collection of levies which will be outsourced to the Kenya Revenue Authority
- The **Kenya Tourism Board** – which will be responsible for international and domestic tourism destination marketing and destination branding. It will be restructured to accommodate the National Convention Bureau as an independent unit for marketing business tourism. The Board will later be taken over by Promotion Kenya as proposed in the Report of the Presidential Taskforce on Parastatal Reforms.
- **Kenya Utalii College** - will be restructured into a centre of excellence in tourism and hospitality training. The Tourism Research Institute will be a semi-autonomous agency under KUC. This is in line with the proposal of the Report of the Presidential Taskforce on Parastatal Reforms.



...institutional structure

- **Baraza Kenya** which will manage the Kenyatta International Convention Centre (KICC) as it currently exists and Nairobi International Convention Centre (NICC) – this will be developed at the current Bomas of Kenya under a Public Private Partnership.

These are equivalent to, and the most common, and often only, tourism entities in benchmark and many other countries.

Bomas of Kenya:

National Tourism Departments, rarely if at all, own and operate tourism facilities or tourism trading entities, whether self-funding or funded by the public sector. Typically public sector owned or funded tourism entities are either run by trusts or associations which simply receive the public funds, or run as parastatals at a local or provincial level often in public private partnership (PPP) arrangements.

Bomas of Kenya and the KICC, will be considered for a PPP operation with a private sector operator, together or separately. They could possibly be ceded to the Nairobi County to own and operate at a later stage.

Utalii College

National Tourism Departments rarely if at all, operate tourism educational or training institutions.

Utalii College is recognised as a key Tourism Education and Training Institute which has an important industry role. Initially it will remain within as is, but a process may be undertaken to either cede the College to an existing university or to either sell it to a private party or set it up as a PPP with a private sector operator.

The Tourism Regulatory Authority

The Tourism Regulatory Authority (TRA) will regulate the industry through registration and categorisation of all tourism businesses. This is as largely as per the current TRA mandate and it will:

- a. Formulate guidelines and prescribe measures for sustainable and quality tourism products throughout the country;
- b. Regulate tourism activities and services countrywide through registration;



...institutional structure

- c. Develop and implement, in consultation with relevant stakeholders, criteria for standardization and classification of tourism facilities and services;
- d. Within the agreed classification, grade all tourism and tourist-related activities and services including cottages and private residences engaged in guest house services;
- e. Develop and implement a code of good practice for the tourism sector;

Some current responsibilities of the TRA should fall away. These include:

- vet and recommend expatriates seeking employment in the tourism and hospitality sector – this remains with the department of immigration only;
- licensing of tourism operations which will be devolved to the counties.
- undertake, annually, an assessment and audit of tourism activities and services, measures and initiatives at the national level, and prepare and publish an annual national tourism sector status report, in consultation with the Minister and the relevant lead agencies – this goes to the Research and Monitoring Department;
- develop and regulate, in consultation with the ministry for the time being responsible for matters relating to education, tourism and hospitality curriculum, examination and certification – this goes to the National Department of Education and the various training institutes themselves and industry liaison on this area will be spearheaded by the Tourism Development HR & Skills unit.
- The regulation of Tourism Associations should be reconsidered. Effectively this should be left to the private sector to develop associations as they see fit within the legal and regulatory framework for companies and associations and the KTF should then encourage standards and membership of KTF as a voluntary further “vetting”.



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The Tourism Fund will remain but the collection of levies will be outsourced to the Kenya Revenue Authority.

The collected levies, and any other income, will be handed over to the Department of Finance in the Ministry of Tourism for disbursement.

Tourism Finance Corporation

Few countries have separate DFIs for Tourism.

The activities of the Tourism Finance Corporation will be transferred to the IDB Capital or other equivalent national DFI for Kenya.

Kenya Tourism Board

The Kenya Tourism Board will conduct international and domestic destination marketing for Kenya. The KTB's functions will cover marketing including Business Tourism marketing through a convention bureau unit and research required to inform marketing, e.g. brand, tourism characteristics and tourism trends research, in conjunction with the Ministries research unit.

- Develop, implement and co-ordinate a national tourism marketing strategy to target the domestic, regional and international markets for all travel purposes;
- Market Kenya at local, national, regional and international levels as a premier tourist destination;
- Ensure the Kenya tourism brand is well placed at the international market with sustained market penetration.
- Public relations, destination reassurance and media management activities in the sector.
- Identify tourism market needs and trends and advise tourism stakeholders accordingly;

National Convention Bureau

- Develop and implement a business tourism strategy for the country
- Assist Counties, within the national product development strategy to identify business tourism opportunities and to consider development of convention facilities



...institutional structure

- Promote and market Kenya globally as a top business tourism destination.
- Develop a national event and event bidding strategy and support associations and destinations to bid for events

The convention bureau is housed in KTB in line with the strategic intent to reduce the number of parastatals and related duplication of administrative and related functions. It is possible that a convention bureau as a separate entity be considered at a later stage.

The Board will later be taken over by Promotion Kenya as proposed in the Report of the Presidential Taskforce on Parastatal Reforms.

9.2.2 Counties

The counties are grouped into seven geographical tourism regions and each of these regions will have a Regional Tourism Councils (RTCs) which will include the technical officials from the relevant counties together with private sector representatives. It is essential that the private sector participate here to ensure strong partnerships and buy-in to the tourism development and marketing in the regions.

The RTCs will be funded through public sector funds via the State Department of Tourism via the counties and possibly from private sector funds.

They will be tasked mainly with developing and implementing regional tourism strategies and will concentrate on product development planning, and planning and implementing of elements of marketing, particularly for all types of domestic tourism. Actual product development implementation will be at country level.

RTC budgets will vary but are expected to be in the region of US\$4 million – US\$7 million for planning and marketing.

There will be two Tourism committees which incorporate all the RTCs or regions; viz a Tourism Members (or ministers) Committee to which each RTC nominates one of its counties' elected members, and a Tourism Technical Committee to which each RTC sends a representative tourism official. The Tourism Technical Committee will liaise with and report to the Tourism Members Committee which in turn will report to the Council of Governors.



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The Counties have an important on the ground role in implementing tourism product development including spatial planning for tourism and will develop and operate tourist amenities (eg parking, ablutions, public transport) as well as develop and upkeep, and operate where appropriate, key tourism facilities.

9.3 Thrust 2 - Raise the profile of the Tourism Industry within Parliament and Cabinet, with the Counties and in the economic and Industrial spheres by way of Budget Allocation

It is absolutely vital that tourism as an economic activity that can deliver on its potential and the Vision 2030, is profiled and elevated to be seen as a highly important economic sector, through-out all levels and arenas in the public sector and the finance and business sector.

This will be achieved by elevating tourism to an agenda item on cabinet, inter-ministerial committees and at the Council of Governors, the development of key tourism indicators and statistics, and concerted public relations campaigns and relationship building initiatives with target audiences.

The salient test of the success of the raising of the profile of tourism sector will be that the required budgets to support the strategic blueprint are provided.

Budgets have been estimated by Strategic Thrust actions in the detailed implementation plans. These budgets cover roles regarding tourism to be handled in other entities as well as the National Department and its entities, and also projected RTC and County budgets. A detailed summary of the budgets by strategy and entity is shown in the Implementation Plan budget summary.

Over the timeframe to 2030, the projected budgetary requirements are shown in Table 9.1.

The total budget required to implement the Tourism Strategic Blueprint is KES45 673 million in 2017, and reaches its highest levels at KES 205 752 million in 2019, a year of major infrastructure spend. These numbers are excluding overheads and staff costs, and RTC budgets:



...institutional structure

The total budget required for the State Department of Tourism is KES5 514,6 million (including overheads and staff costs) in 2017, and rises more or less steadily over the strategy period:

Table 9.1 Projected Tourism Budgets

Total By Entity	2017	2018	2019	2020	2021	2022-2026	2027-2030	Total
						annual	annual	
KS (millions)						average	average	
Department of Tourism	1,609.7	2,230.5	2,998.7	2,694.2	2,693.0	2,804.1	3,125.4	38,748.0
KTB	3,554.9	3,115.6	2,921.1	3,111.0	3,313.2	4,336.4	5,739.6	60,656.5
TRA	350.0	270.0	200.0	213.0	226.8	268.8	307.3	3,833.3
KenInvest	82.0	117.3	125.0	133.1	141.7	170.7	226.3	2,357.7
RTCs	3,521.0	4,335.1	5,465.4	5,173.8	5,498.8	1,677.1	1,829.6	39,698.0
Counties	2,494.3	3,015.5	3,540.2	1,374.5	1,557.9	637.1	844.5	18,545.9
Other, e.g. KWS, Museums etc.	38,775.8	75,620.1	195,652.2	183,714.8	61,748.0	167.4	219.7	557,226.8
Total	50,387.7	88,704.3	210,902.5	196,414.3	75,179.5	10,061.7	12,292.4	721,066.3
Department of Tourism	1,609.7	2,230.5	2,998.7	2,694.2	2,693.0	2,804.1	3,125.4	18,155.5
KTB	3,554.9	3,115.6	2,921.1	3,111.0	3,313.2	4,336.4	5,739.6	26,091.9
TRA	350.0	270.0	200.0	213.0	226.8	268.8	307.3	1,836.0
Total National Tourism	5,514.6	5,616.1	6,119.8	6,018.2	6,233.0	7,409.4	9,172.3	46,083.4

Funds for the National Department and its entities, and to support RTCs, will be sourced from the Tourism vote from National Treasury, from the levy collection, and from departure taxes. Levy and departure tax funding may also support other product development and pre-investment promotion (feasibility study) initiatives. Funds for other entities and counties will be from their budget allocation. The Ministry and RTCs may source funds from development agencies for specific projects.



9.4 Thrust 3 - Create strong linkages to other Ministries & between Counties and National Government & Entities: Coordination within Government and Stakeholders

The key coordination required between the Ministry together with its two entities (KTB & TRA) and the tourism regions and Counties and the private sector will be via a National Tourism Council which will include the Ministry of Tourism, RTCs (RTC CEOs and the county technical council members), and representatives from KTB, TRA, KUC, Baraza Kenya, Tourism Fund, two representatives from the tourism private sector and four from elsewhere in the tourism supply chain.

Inter-ministerial coordination will be achieved through an Inter-agency tourism council comprising all relevant ministries and the office of the president and all other relevant national entities. Given the unique and extremely important role of Kenya's national parks in delivering quality experiences in respect of one of the country's two unique selling points, the links and collaboration with Kenya Wildlife Services will be exceptionally strong and tourism outcomes, always balanced with conservation outcomes will be built into Kenya Wildlife Service goals and objectives.

9.5 Thrust 4 - Develop strong collaborative partnerships with industry (Private Sector)

Kenya's private sector is represented by more than 15 associations, including a number of smaller regional associations. This is depicted in Figure 9.2. Seven of the Kenyan private sector associations are members of the umbrella association in the Kenyan Tourism Federation (KTF). The member associations are:

- Kenya Association of Tour Operators (KATO) - 400 professional tour operators
- Kenya Association of Travel Agents (KATA) - 100+ Kenyan travel agents
- Kenya Association of Hotel Keepers & Caterers (KAHC) - bringing together hotels, lodges, restaurants, membership clubs and prominent airline caterers.
- Pubs, Entertainment & Restaurants Association of Kenya (PERAK) - major restaurants, pubs and entertainment venues
- Kenyan Coast Tourist Association – coastal tourism business stakeholders
- Ecotourism Kenya – 550 Individuals, Community Based Organisations (CBOs) and tourism businesses
- Kenya Association of Air Operators – Kenyan Air Operators.



...institutional structure

Figure 9.2 Private Sector Structures in Kenya



The key objectives of KTF are to: -

- Provide a single voice for the tourism industry;
- Enhance ethics and standards in the tourism industry;
- Strengthen private sector representation on the various organisations/boards that impact on tourism;
- Provide a forum through which the industry can give input to the marketing activities of the Kenya Tourism Board;
- Lobby and constructively engage Government on issues critical to the industry

The KTF will spearhead the private sector's partnership with government and participate on the Tourism Coordination Committee.



...institutional structure

The Private sector associations will strive together to strengthen the KTF and push for all associations to become members of the KTF and to strengthen their capacity and enhance their functions.

Professionalisation of associations will be encouraged and the dual voice of Government and the KTF will be seen to be the mouth piece of tourism demonstrating the key partnership between the public and private sectors, which is needed to drive a successful tourism industry. Capable, strong and passionate leadership and good governance will be fostered and striven for in all associations.

Actions will be undertaken to stimulate the creation of key new associations, e.g., a Business Tourism Association to support the strategy to develop business tourism, and others such as an attraction association.

9.6 Tourism Roles

The Roles of the institutions at the various levels are summarised in the tables below.

The Key Structures at National Level are:

Ministry	The Ministry and Department is responsible for national tourism policy & planning, research & monitoring, development and finance allocation. Development includes human resources, product & experiences and innovation and ICT.
Inter-Agency Tourism Council (CSs and PSs)	The inter-agency tourism council of the National Minister of Tourism ensures that policy and plans of the various Ministries and other relevant national entities and the policies and plans for tourism are in sync and in support of tourism development.
National Tourism Council (Ministry, Tourism Entities, Regions and Private Sector)	This coordinating council ensures synchronisation and common goals for all of Kenya by ensuring that regional and county plans and marketing are aligned with the national plans and marketing, and allows sharing of expertise and resources where appropriate between regions and counties. The Ministry and its various entities meet with the county tourism technical committee members and CEOs of RTCs and the Private sector. The Ministry and its various entities meet to coordinate planning and marketing with respect to tourism regions and counties.



...institutional structure

KTB	KTB is responsible for international and domestic marketing of Kenya as a tourism destination including a national convention bureaus, and specific research in support of marketing.
TRA	The TRA does tourism registration and quality assurance/grading.
Tourism Fund	The Tourism Fund will outsource the collection of levies to the Kenya Revenue Authority and will remain a collection agency.
Kenya Utalii College	KUC will be restructured into a centre of excellence in tourism and hospitality training. The Tourism Research Institute will be a semi-autonomous agency under KUC.
Baraza Kenya	Baraza Kenya will manage the Kenyatta International Convention Centre (KICC) as it currently exists and Nairobi International Convention Centre (NICC) – this will be developed at the current Bomas of Kenya under a Public Private Partnership

At the level of the tourism regions:

Regionaltourism authorities	<p>Regional tourism authorities develop regional tourism strategies and conduct regional tourism marketing for the domestic and international markets. They must align their international tourism marketing efforts with those of KTD to ensure synergy and work with County Tourism departments and the County Tourism Boards and/or Local Tourism Associations where applicable on planning and product development, and developing/packaging new themes, routes and experiences.</p> <p>They should establish an integrated regional tourism information system (including accredited information offices network) together with the counties and the private sector.</p> <p>RTOs will include formal partnership arrangements with the private sector on governance, funding, and strategic inputs.</p>
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...institutional structure

At Country Level:

County Member Committee	The County Member Committee will coordinate with the County Technical Committee to ensure that where applicable collaboration across all counties with respect to tourism activities is achieved and the council of governors are kept informed and provide inputs.
County Technical Committee	The County Technical Committee coordinates activities where applicable, across the 7 RTCs, and supports information sharing on new practices as well as liaises with the National Department on all tourism matters.
Counties	<p>The Counties' line function departments should be responsible for all integrated development matters, including the development of tourist attractions, the provision of public amenities and infrastructure in support of tourism, and the general maintenance of the environment. These should be part of the development plan of the Country. This will include:</p> <ul style="list-style-type: none">• Establish, and provide financial support to, the RTC and CTB if in existence• Work with the RTC in developing and implementing tourism planning, development and marketing• Upkeep and development of public tourist attractions (e.g. historical, cultural and environmental)• Conduct spatial planning in support of tourism, and allocate land and infrastructure for tourism development• Licensing of tourism operators• Provide public amenities, such as parking, ablution facilities and public transportation, in support of the tourism industry• Conduct spatial planning in support of tourism, and allocate land and infrastructure for tourism development• Plan and provide local road signs• Maintain the general safety, upkeep, cleanliness and beautification of the local area – through relevant byelaws• Manage the information office(s) of the county area, and feed into the regional information system• Market specific events, conferences and meetings that occur in the county area• Assist the TRA as a first point of registration for tourism businesses in respect of the national registration system• Promote tourism awareness, a culture of hospitality, and involvement in tourism among the local population• Keep a general watch over tourism matters, and advise the RTC regarding tourism issues and development requirements• Initiate basic training and education programmes to improve tourism knowledge and skills, within the framework set at national level• Establish a tourism business advisory network to encourage and stimulate entrepreneurship• Initiate programmes to facilitate increased participation by previously disadvantaged communities and entrepreneurs in tourism <p>. Some of the above may be devolved to a tourism board should such an entity be considered necessary.</p>



County Tourism Boards

Generally counties should not have a tourism board. It is intended that by pooling resources into a regional tourism organisation based on destinations, more coordinated and integrated development, support and marketing of tourism will occur. However, some strong tourism counties could have a tourism board. Tourism-specific functions should be carried out by a Country Tourism Board:

- be established by the Council and private businesses in a local area, as a legal entity that represents these parties;
- be jointly funded by the Council authority and private-sector/industry members in the area, as well as from own revenue, including marketing commissions;
- include a significant number of persons who represent previously disadvantaged constituencies
- develop and implement marketing strategies
- develop and implement event strategies and operate a convention bureau in support of bids for events and management and coordination around events.



Implementation **Plan**

Budget per Strategy	2017	2018	2019	2020	2021	2022-2026	2027-2030	Total
KS (millions)								
Marketing	3,054.9	2,583.1	2,354.0	2,507.0	2,670.0	17,870.9	19,472.7	50,512.7
Investment Promotion	108.3	145.3	154.7	164.8	175.5	1,058.1	1,122.4	2,929.1
Institution & Stakeholder	26.4	19.8	21.1	22.8	24.0	142.4	132.4	389.0
Innovation & Change	867.8	924.2	984.3	852.2	740.6	4,387.9	4,013.2	12,770.2
HR	-	607.9	805.2	821.6	861.4	5,050.2	5,346.7	13,493.0
Product	2,840.9	4,412.8	7,442.5	4,534.1	4,452.4	8,737.9	6,661.8	39,082.4
Infrastructure	38,746.0	75,055.0	193,895.0	181,930.0	60,311.0	-	-	549,937.0
Research & Knowledge Management	28.4	37.3	94.8	96.1	102.3	620.6	658.2	1,637.8
Total	45,672.7	83,785.5	205,751.6	190,928.6	69,337.2	37,868.1	37,407.4	670,751.1

Ministry of Tourism - Programmes	2017	2018	2019	2020	2021	2022-2026	2027-2030	Total
KS (millions)								
Marketing								-
Investment Promotion - feasibility studies	26.3	28.0	29.8	31.7	33.8	204.8	217.2	571.4
Institution & Stakeholder	26.4	19.8	21.1	22.8	24.0	142.4	132.4	389.0
Innovation & Change	867.8	924.2	984.3	852.2	740.6	4,387.9	4,013.2	12,770.2
HR (Ministry of Tourism)	-	509.7	644.3	669.3	712.8	4,322.2	4,583.8	11,442.2
Product (Ministry of Tourism)	295.8	322.8	810.4	581.2	609.9	1,560.2	352.2	4,532.5
Research & Knowledge Management (Ministry of Tourism)	28.4	37.3	94.8	96.1	102.3	620.6	658.2	1,637.8
Total	1,244.7	1,841.8	2,584.7	2,253.3	2,223.4	11,238.2	9,957.0	31,343.0

KTB								
Marketing	3,054.9	2,583.1	2,354.0	2,507.0	2,670.0	17,870.9	19,472.7	50,512.7
KenInvest								
Investment Promotion	82.0	117.3	125.0	133.1	141.7	853.3	905.3	2,357.7
RTOs								
Product	21.0	607.6	1,495.6	945.9	996.2	3,883.1	2,815.7	10,765.0
Marketing, planning & staff	3,500.0	3,727.5	3,969.8	4,227.8	4,502.6	4,502.6	4,502.6	28,933.0
Counties								
Product	2,494.3	3,015.5	3,540.2	1,374.5	1,557.9	3,185.3	3,378.1	18,545.9
Other								
Product (reserves, KWS etc.)	29.8	466.9	1,596.4	1,632.5	1,288.4	109.2	115.8	5,239.0
HR (Ministry of Education, training institutions)	-	98.2	160.8	152.3	148.6	728.0	762.9	2,050.8
Infrastructure	38,746.0	75,055.0	193,895.0	181,930.0	60,311.0	-	-	549,937.0
Grand Total (excl national salaries & support)	49,172.7	87,513.0	209,721.4	195,156.4	73,839.8	42,370.7	41,910.0	699,684.1

Not incl above in total

By Entity	2017	2018	2019	2020	2021	2022-2026	2027-2030	Total
KS (millions)								
Department of Tourism	1,244.7	1,841.8	2,584.7	2,253.3	2,223.4	11,238.2	9,957.0	31,343.0
KTB	3,054.9	2,583.1	2,354.0	2,507.0	2,670.0	17,870.9	19,472.7	50,512.7
KenInvest	82.0	117.3	125.0	133.1	141.7	853.3	905.3	2,357.7
RTOs	3,521.0	4,335.1	5,465.4	5,173.8	5,498.8	8,385.7	7,318.3	39,698.0
Counties	2,494.3	3,015.5	3,540.2	1,374.5	1,557.9	3,185.3	3,378.1	18,545.9
Other, e.g. KWS, Museums etc.	38,775.8	75,620.1	195,652.2	183,714.8	61,748.0	837.2	878.7	557,226.8
Total	49,172.7	87,513.0	209,721.4	195,156.4	73,839.8	42,370.7	41,910.0	699,684.1
Overheads & staff costs								
Department of Tourism	365.0	388.7	414.0	440.9	469.6	2,782.2	2,544.6	7,405.0
TRA	350.0	270.0	200.0	213.0	226.8	1,344.1	1,229.3	3,833.3
KTB	500.0	532.5	567.1	604.0	643.2	3,811.3	3,485.8	10,143.9
Total	1,215.0	1,191.2	1,181.1	1,257.9	1,339.6	7,937.6	7,259.7	21,382.2
Grand Total Incl national salaries & support	50,387.7	88,704.3	210,902.5	196,414.3	75,179.5	50,308.4	49,169.7	721,066.3

Total By Entity	2017	2018	2019	2020	2021	2022-2026	2027-2030	Total
KS (millions)						annual average	annual average	
Department of Tourism	1,609.7	2,230.5	2,998.7	2,694.2	2,693.0	2,804.1	3,125.4	38,748.0
KTB	3,554.9	3,115.6	2,921.1	3,111.0	3,313.2	4,336.4	5,739.6	60,656.5
TRA	350.0	270.0	200.0	213.0	226.8	268.8	307.3	3,833.3
KenInvest	82.0	117.3	125.0	133.1	141.7	170.7	226.3	2,357.7
RTOs	3,521.0	4,335.1	5,465.4	5,173.8	5,498.8	1,677.1	1,829.6	39,698.0
Counties	2,494.3	3,015.5	3,540.2	1,374.5	1,557.9	637.1	844.5	18,545.9
Other, e.g. KWS, Museums etc.	38,775.8	75,620.1	195,652.2	183,714.8	61,748.0	167.4	219.7	557,226.8
Total	50,387.7	88,704.3	210,902.5	196,414.3	75,179.5	10,061.7	12,292.4	721,066.3
Department of Tourism	1,609.7	2,230.5	2,998.7	2,694.2	2,693.0	2,804.1	3,125.4	18,155.5
KTB	3,554.9	3,115.6	2,921.1	3,111.0	3,313.2	4,336.4	5,739.6	26,091.9
TRA	350.0	270.0	200.0	213.0	226.8	268.8	307.3	1,836.0
Total National Tourism	5,514.6	5,616.1	6,119.8	6,018.2	6,233.0	7,409.4	9,172.3	46,083.4

Total By Entity	2017	2018	2019	2020	2021	2022-2026	2027-2030	Total
US\$ Millions								
Department of Tourism	16.1	22.3	30.0	26.9	26.9	28.0	31.3	387.5
KTB	35.5	31.2	29.2	31.1	33.1	43.4	57.4	606.6
Keninvest	0.8	1.2	1.2	1.3	1.4	1.7	2.3	23.6
RTOs	35.2	43.4	54.7	51.7	55.0	16.8	18.3	397.0
Counties	24.9	30.2	35.4	13.7	15.6	6.4	8.4	185.5
Other	387.8	756.2	1,956.5	1,837.1	617.5	1.7	2.2	5,572.3
TRA	3.5	2.7	2.0	2.1	2.3	2.7	3.1	38.3
Total	503.9	887.0	2,109.0	1,964.1	751.8	100.6	122.9	7,210.7
Department of Tourism	16.1	22.3	30.0	26.9	26.9	28.0	31.3	181.6
KTB	35.5	31.2	29.2	31.1	33.1	43.4	57.4	260.9
TRA	3.5	2.7	2.0	2.1	2.3	2.7	3.1	18.4
Total	55.1	56.2	61.2	60.2	62.3	74.1	91.7	460.8

Kenya Tourism Strategy 2030 - Implementation Plan - Research & Knowledge Management Strategic

Strategic Thrust	Strategic Action	Timing							Primary Responsibility	Budget Description	Budget (KSh millions)								Monitoring & Evaluation
		2017	2018	2019	2020	2021	2022-2026	2027-2030			Base Number	2017	2018	2019	2020	2021	2022-2026	2027-2030	
1	Market (visitor) research	1							Ministry of Tourism	Training costs	149	8	12	12	13	14	84	89	Approval of training programme
		2							Ministry of Tourism	Stakeholder consultation costs	1	1							Minutes of meeting
		3							Ministry of Tourism	Professional fees	7	7							Approval of research plan
		4							KTB	Time costs	-								Completion of visitor surveys
		5							Ministry of Tourism	Research costs	140		11	12	13	14	84	89	Approval of research reports
										536	1	4	50	54	57	346	367		
2	Tourism industry research	1							Ministry of Tourism	Research grants	490			46	49	53	319	338	Approval of research grants
		2							Ministry of Tourism	Stakeholder consultation costs	1	1							Minutes of meeting
		3							Ministry of Tourism	Time costs	-								Approval of specifications
		4							Ministry of Tourism	Time costs	-								Approval of PR material
		5							Ministry of Tourism	Research costs	46		4	4	4	5	27	29	Approval of research reports
										60	-	-	10	5	6	35	37		
3	Knowledge management & information dissemination	1							Ministry of Tourism	Time costs	-								Number of registered businesses
		2							Ministry of Tourism	Time costs	-								Approval of database
		3							Ministry of Tourism	Time costs	-								Approval of database updates
		4							Ministry of Tourism	Professional fees	18			6	1	2	10	10	Launch of online platform
		5							Ministry of Tourism	Venue hire & catering	28			2	3	3	17	18	Approval of mechanism
		6							Ministry of Tourism	Venue hire & catering	14			1	1	1	8	9	Minutes of meeting
		7							Ministry of Tourism	Time costs	-								Approval of research plans
		8							Ministry of Tourism	Time costs	-								Approval of reports
										280	20	21	23	24	26	156	165		
4	Monitoring & evaluation	1							Ministry of Tourism	Research costs	70	5	5	6	6	6	39	41	Visitor satisfaction reports
		2							Ministry of Tourism	Research costs	210	15	16	17	18	19	117	124	Approval of research programme & impact reports
		3							Ministry of Tourism	Time costs	-								Approval of research programme
TOTAL BUDGET in KSHS										1024.2	28.4	37.3	94.8	96.1	102.3	620.6	658.2		
US\$										10.2	0.3	0.4	0.9	1.0	1.0	6.2	6.6		

Kenyan Tourism Strategy 2030 - Implementation Plan - Marketing Strategic Direction

Strategic Thrust	Strategic Action	Timing							Primary Responsibility	Budget Description	Budget (KSh millions)								Monitoring & Evaluation
		Year 1	Year 2	Year 3	Year 4	Year 5	Years 6-10	Years 11-14			Base Number	Year 1	Year 2	Year 3	Year 4	Year 5	Years 6-10	Years 11-14	
Confirm agreement with all recommended principles/approaches & objectives	Confirm marketing principles are agreed								KTB with Ministry of Tourism	No additional budget only staff time									Approval of KTS2030 Marketing Recommendations
	Confirm agreement with marketing objectives								KTB with Ministry of Tourism	No additional budget only staff time									Approval of KTS2030 Marketing Recommendations
Strategic Thrust 1: Aligned & Integrated Tourism Branding & Positioning	1.1 Define the tourism experiences & assess market readiness for tourism branding purposes																		
	- Accept the definition of tourism experiences for Kenya to be used for marketing purposes or make adjustments as required				Re-assess every 3 years		Re-assess every 3 years	Re-assess every 3 years	KTB	No additional budget only staff time									Experience definition framework adjusted via industry research
	- Accept the assessment of the market readiness of Kenya's tourism experiences for branding and positioning development or make adjustments as required				Re-assess every 3 years		Re-assess every 3 years	Re-assess every 3 years	KTB	No additional budget only staff time									Experience definition framework adjusted via industry research
	1.2 Refresh or develop a new Kenya Tourism Brand																		
	- Undertake further stakeholder input collation to determine whether to create an entire new tourism brand or keep the current tourism brand, "Magical Kenya", but refresh and expand it.							Re-assess every 5 years	Re-assess every 5 years	KTB	Mostly staff time but some stakeholder assessment required including continued Future Brand assessment		14.0				19.2	26.3	Approval of adjusted KTIPS & Adjusted KTIP Plan
	- Accept or change the brand recommendations provided in the KTS2030.								KTB	No additional budget only staff time									Approved Brand policy
	- Make informed decisions on which categories of the Future Brand Country Brand net promotor scores Kenya would like to improve and what scores are to be aimed for				Re-assess every 3 years		Re-assess every 3 years	Re-assess every 3 years	KTB with Ministry of Tourism	No additional budget only staff time									Approved Brand objectives
	- Brief a brand development agency to develop a new or refreshed tourism brand identity for Kenya							Re-assess every 5 years	Re-assess every 5 years	KTB	Budget for brand development of all collateral starting at US\$3.5 mil		350.0				479.5	657.0	Brand development report & outputs
	- Update all collateral with new/refreshed branding							Re-assess every 5 years	Re-assess every 5 years	KTB	Budget for update of all collateral over a two year period starting at US\$7 mil		350.0	372.8			990.2	1356.7	Revised collateral
	- Launch the new/refreshed brand identity							Re-assess every 5 years	Re-assess every 5 years	KTB	in general marketing activity budget								Marketing Plan
	1.3 Alignment of all other tourism branding (counties, private sector) with the new/refreshed national Tourism Branding																		
	- Maintain close alignment between the national tourism branding as proposed by KTB and that used by other government tourism entities, private sector and counties								KTB	No additional budget only staff time									Approval of KTS2030 branding recommendations
	- Continuously monitor the usage of the brand								KTB	No additional budget only staff time									Annual review of marketing branding alignment and usage
	1.4 Develop New/Refreshed Tourism Branding & Positioning to be Core Experience Based																		
	- Work within the parameters of new or refreshed tourism re-branding AND develop additional "Experiential" (i.e. what to do) tag lines and positioning materials. Accept recommendations provided in KTS2030 or develop new tag lines							Re-assess every 5 years	Re-assess every 5 years	KTB	In branding agency for branding refresh/renew budget								Brand development report & outputs
	- Undertake continuous research with both consumers and the trade to confirm core experience/USPs and to monitor whether these are the core experiences actually sold, sought and bought and adjust the agreed experiences								KTB	Tourist exit and tourism trade branding and positioning surveys commencing at US\$700 000 pa		70.0	79.4	84.6	90.1	95.9	581.5	616.7	Survey results and reports

	1.5 Expand New/refreshed Tourism Branding & Positioning by specifying Key Supporting or Niche Experiences																			
	- Work within the parameters of new or refreshed tourism re-branding AND develop additional "Experiential" (i.e. what to do) tag lines and positioning material. Accept recommendations provided in KTS2030 or develop new tag lines						Re-assess every 5 years	Re-assess every 5 years	KTB	In branding agency for branding refresh/renew budget										Brand development report & outputs
	- Continuously undertake further research with both consumers and the trade to confirm niche experiences and to monitor whether these are the experiences actually sold, sought and bought and adjust the agreed experiences								KTB	In above tourist exit and trade branding & position survey cost										Survey results and reports
	1.6 Identify potential for long term expansion & development of visitor experiences																			
	- Further develop the following existing Supporting or Key Niche Experiences that have potential to become Core experiences in the medium to long term						Re-assess every 5 years	Re-assess every 5 years	KTB	In branding agency for branding refresh/renew budget										Brand development report & outputs
	1.7 Strongly align County use of Branding & Positioning to National Branding & Positioning																			
	- Implement a policy of no separate branding by geographical region, only by experience.								KTB with Ministry of Tourism	No additional budget only staff time										Branding policy
	- Implement a policy of no separate branding/positioning strategies to be developed by counties, only by experience.								KTB with Ministry of Tourism	No additional budget only staff time										Branding policy
	- Communicate to the public sector the branding strategy, the branding materials available and how they are to use it								KTB	No additional budget only staff time										Stakeholder Communication strategy
	- Make branding strategy and branding materials easily accessible to and usable by county public sector.								KTB	No additional budget only staff time										Communication strategy & Marketing tools
	- Monitor the usage of the national branding materials by county and regional public sector and if not used determine concerns and adjust accordingly if required								KTB	No additional budget only staff time										Annual review of marketing branding alignment and usage
	1.8 Encourage the use of National tourism branding by Private Sector																			
	- Through continuous dialogue with the private sector determine whether experiences branded are in fact experiences sold by private sector and sought and bought by their customers and make adjustments of required								KTB	No additional budget only staff time										Annual review of marketing branding alignment and usage
	- Communicate to the private sector the branding strategy, the branding materials available and how they are to use it.								KTB	No additional budget only staff time										Stakeholder Communication strategy
	- Make branding strategy and branding materials accessible to and usable by private sector.								KTB	No additional budget only staff time										Stakeholder Communication strategy & Marketing tools
	- Monitor the usage of the materials by private sector and if not used determine the reasons why and adjust materials accordingly if required								KTB	No additional budget only staff time										Annual review of marketing branding alignment and usage

Strategic Thrust 2: Prioritised & Experience Based Market Segmentation	2.1 Develop Current & Recommended Market Segmentation Grid																								
	- Establish current (basis) Kenya tourism market segmentation grid. Either accept the suggested grid or make changes as required						Re-assess every 5 years	Re-assess every 5 years	KTB	Budget for segmentation research and segmentation recommendations starting at US\$1.4 mil								140.0		191.8	262.8	Segmentation reports and outputs			
	- Based on existing information identify changes to take into consideration in respect of the current Kenya tourism market segmentation grid.								KTB	No additional budget only staff time												Approval of segmentation recommendations in KTS2030			
	- Based on existing market information, adjust tourism market segmentation grid (based on current grid format) and prioritise.						Re-assess every 5 years	Re-assess every 5 years	KTB	in above budget for segmentation research												Segmentation reports and outputs			
	- Decide on market segmentation focus.						Re-assess every 5 years	Re-assess every 5 years	KTB	in above budget for segmentation research												Segmentation reports and outputs			
	- Based on existing market information align the grid to core experiences and re-prioritise.						Re-assess every 5 years	Re-assess every 5 years	KTB	in above budget for segmentation research												Segmentation reports and outputs			
	- Identify market intelligence gaps impairing the decision making process, undertake research to fill identified gaps and adjust the tourism market segmentation grid accordingly on a continuous basis						Re-assess every 5 years	Re-assess every 5 years	KTB	in above budget for segmentation research												Segmentation reports and outputs			
	- Communicate the market segmentation grid to public and private sector stakeholders & monitor their implementation of the segments. If not followed identify reasons and adjust grid accordingly if required								KTB	No additional budget only staff time												Stakeholder Communication strategy			
	2.2 Develop Targets for Recommended Market Segments																								
	- Establish targets based on geographic source markets & linked to overall arrivals growth objectives						Re-assess every 5 years	Re-assess every 5 years	KTB	in above budget for segmentation research												Segmentation reports and outputs			
	- Establish broad expectations for core experience segments & for support/niche experience segments in a collective approach						Re-assess every 5 years	Re-assess every 5 years	KTB	in above budget for segmentation research												Segmentation reports and outputs			
	- Specify future target approach based on experience segments and identify the research required to be able to establish baselines for this approach						Re-assess every 5 years	Re-assess every 5 years	KTB	in above budget for segmentation research												Segmentation reports and outputs			
	- Undertake research to determine whether targets are accomplished & adjust segments and targets accordingly as required.						Re-assess every 5 years	Re-assess every 5 years	KTB	in above budget for segmentation research												Segmentation reports and outputs			
	Strategic Thrust 3: Develop and undertake Experience based Marketing Distribution Plans																								
	3.1 Develop & Implement Marketing Tools																								
	- Accept primary marketing tools by experience segment as provided in the KTS2030 or change as required								KTB	No additional budget only staff time												Approval of Marketing tool recommendations in KTS2030			
	- Develop marketing tools (particularly essential tools) and implement for usage								KTB	Some in branding & segmentation study budgets but additional budget added here for actual activities starting at US\$11 mil								1100.0	1065.0	1134.2	1207.9	1286.5	7800.8	8272.9	Revised tools
	- Communicate the marketing tools to public and private sector and monitor their usage of the tools and adjust accordingly if required.								KTB	No additional budget only staff time												Stakeholder Communication strategy			
	3.2 Identify and implement Marketing Channels to Support the Experience Segmentation Approach																								
	- Accept the broad channel recommendations by experience segment as per KTS2030 or change as required								KTB	No additional budget only staff time												Approval of Channel recommendations in KTS2030			
	- Develop marketing tools (particularly essential tools) that are fit for appropriate channels and implement for usage								KTB	Similar to budget in 3.1								1100.0	1065.0	1134.2	1207.9	1286.5	7800.8	8272.9	Revised tools
	- Communicate the marketing channels to public and private sector and monitor their usage of the channels and adjust accordingly if required.								KTB	No additional budget only staff time												Stakeholder Communication strategy			

3.3 Undertake Safety & Security Marketing Activities																			
	- Add a safety & security page on the tourist and trade website (Safety Advisory page) (KTB and Magical Kenya sites) & continuously link other relevant tourism sites as required.																		Revised tools
	- Link this Advisory to all social media.																		Revised tools
	- Keep this Safety Advisory page regularly updated with latest safety and security information, tips and notifications. Pre-develop safety advisory messages to advise on tourist safety in crisis times as well as non-crisis times.																		Revised tools
	- Develop a implement a PR strategy that deals with safety and security message distribution in both crisis times as well as non-crisis times (with Media in Kenya and outside). Develop relationships with specific media that can be relied upon to carry prepared messages without change.																		Revised tools
	- Undertake a local media awareness campaign to instil a responsible attitude to reporting around safety and security incidents.																		Media monitoring report
	- Undertake an awareness campaign with the trade (and trade associations) to instil a responsible attitude to their advisory to guests and tourists around safety and security incidents and to ensure linkage to the central Advisory portal. This is to ensure consistency in reporting and information.																		Linkage monitoring report
	- Create and operate a Crisis Management PR task team for marketing and communication purposes encompassing Ministry, RTO Tourism Officials, KTB and Trade Associations.																		Meeting minutes & incident reports
	- Develop a report on foreign country advisory status for Kenya. Monitor this continuously.																		Safety Advisory monitoring report
	- Continuously interact with the relevant foreign government departments to lobby for the lifting or decreasing the intensity of their travel advisories on Kenya.																		Meeting notes & Safety Advisory monitoring report
	- Collect and scan for statements/testimonials from existing visitors to Kenya on their safe travel experiences in Kenya and use for pushing to social media and other platforms/collateral.																		Revised tools
Strategic Thrust 4: Develop a Marketing Budget to Undertake Thrusts 1-3	Develop a Marketing Budget by geographic market, experience and by KTS2030 Strategic Phase.																		Approved marketing budget
	Continuously monitor the marketing budget expenditure and targets reached by geographic market and experience segments and adjust marketing budget accordingly																		Annual performance report

TOTAL BUDGET in KSHS
US\$

3054.9 2583.1 2354.0 2507.0 2670.0 17870.9 19472.7
 30.5 25.8 23.5 25.1 26.7 178.7 194.7

3.4 Linkage activities	Integration with and linkage to activities with the rest of the tourism industry and other appropriate industries/entities. For instance should investment corridors be identified that span countries.																		
	- Ensuring appropriate financing structures that are conducive to tourism investment growth (particularly if provided by government institutions but also lobbying and creating awareness with commercial finance institutions).																		
	a. Institute a formal awareness creation programme whereby the investment promotion and ministry of tourism interact with commercial institutions on the performance and trends of the industry and investment opportunities available in the industry								Ministry of Tourism and/or KTIP Entity as decided	Small additional budget for venue/catering costs but mostly staff time (assuming takes place in Kenya). Assuming 5 industry/finance meetings pa starting @ US\$8 750 each									Increased provision of and take up of financing to tourism industry as per below finance survey results
	b. Undertake survey of trade and investors on finance products available and what needs to be changed								Ministry of Tourism and/or KTIP Entity as decided	No additional budget only staff time & through online survey tools such as Survey Monkey									Survey results report advising changes to be made
	c. Undertake a lobbying of the commercial and governmental finance institutions to adjust finance products according to the needs of the tourism industry								Ministry of Tourism and/or KTIP Entity as decided	No additional budget only staff time (assuming takes place in Kenya)									Survey reponses showing improvement in finance attractiveness, increase in investment (projects "sold") and lobby meeting notes
	- Ensuring that incentives are in place and are conducive to the investment growth in the tourism sector.																		
	a. Clarify exactly which incentives currently provided applies to tourism																		
	b. Clearly provide information on the specific incentives that are relevant to the industry to all industry players including potential investors in a central place that is easily accessible.								Ministry of Tourism and/or KTIP Entity as decided	In KTIP website as per above marketing activities. No separate budget required									Incentive survey (see below) shows improved access to incentive information and Ministry of Trade/KRA surveys shows increased take up of incentives
	c. Undertake research amongst recent tourism investors, the tourism trade, the Ministry of Trade and Kenya Revenue Authority to determine which incentives are accessed, whether these incentives are relevant and working in the way envisioned, what incentives are required								Ministry of Tourism and/or KTIP Entity as decided	No additional budget only staff time & through online survey tools such as Survey Monkey									Survey reponses showing increased knowledge of incentives and take up of incentives
	d. Institute changes to existing incentives or introduce new incentives applicable only to the tourism industry								Ministry of Tourism and/or KTIP Entity as decided as well as KRA & Ministry of Trade	Relook every 5 years									Approval of revised incentives
	e. Interact with the financial institutions and lobby them to allowing incentives to be included in their decisions processes in granting finance								Ministry of Tourism and/or KTIP Entity as decided	as part of Finance Awareness and lobby programme (as per above)									Finance Survey showing improvement in finance attractiveness and number of projects obtaining finance

Kenyan Tourism Strategy 2030 - Implementation Plan - Institution and Stakeholder Strategy

Strategic Thrust	Strategic Action	Timing							Primary Responsibility	Budget Description	Budget (KSh millions)							Monitoring & Evaluation				
		Year 1	Year 2	Year 3	Year 4	Year 5	Years 6-10	Years 11-14			Base Number	Year 1	Year 2	Year 3	Year 4	Year 5	Years 6-10		Years 11-14			
1. Raise the profile of the tourism industry within Parliament and Cabinet, with the Counties and in the economic and industrial spheres	1.1 Develop a set of accurate and timeous, key tourism indicators and statistics for the tourism industry which can be used in presentations and PR to relevant stakeholders and maintain and enhance on an ongoing basis eg a tourism index, a tourism dashboard.	including development			including a refresh			including a refresh	including a major refresh	Department of Research and Monitoring	Small research and development, and tools budget - mainly staff time		1.75				0.25		0.35	2.5	Tourism budget allocation as % of total budget, media reporting on tourism as an industry/ business	
	1.2 Raise awareness and understanding of the tourism industry within Cabinet, the parliamentary tourism committees, and the National Council of Governors by ensuring that tourism is an agenda item, that the CS and Tourism Team speak frequently to the Comitte and the Cabinet									Cabinet Secretary, PS & TS Department Heads and CEOs of KTB, TRA and KTF	No budget - staff and Minister's time											Tourism budget allocation as % of total budget, media reporting on tourism as an industry/ business
	1.3 Raise awareness and understanding of the tourism industry within other relevant national government departments through the interministerial committee									Cabinet Secretary, PS & TS Department Heads and CEOs of KTB, TRA and KTF	No budget - staff, CEOs and Minister's time											Tourism budget allocation as % of total budget, media reporting on tourism as an industry/ business
	1.4 Identify key private sector and government players of influence who understand and support tourism continually lobby to and with them through functions, round tables, dinners and formal meetings to continually position tourism as a top priority									Cabinet Secretary	Entertainment and function budget	3.5	3.7	4.0	4.2	4.5	4.8	28.4	26.0			Tourism budget allocation as % of total budget, media reporting on tourism as an industry/ business
	1.5 Develop specific bilateral relations with other key ministries that have a significant impact on tourism - immigration, transport, education, trade and industry, environment and natural resources and sports art and Culture. Regular communication channels should be developed and maintained between these ministries and the Ministry of Tourism to ensure ongoing communication on tourism-related activities and actions.									Cabinet Secretary, PS & TS, Department Heads and CEOs of KTB, TRA and KTF	No budget - staff and Minister's time											Tourism budget allocation as % of total budget, media reporting on tourism as an industry/ business
	1.6 Develop a specific annual PR and lobbying programme to promote financial and business journalism coverage of the Tourism industry and select a PR company to implement									Cabinet Secretary and PS and TS	PR company costs	3.5	3.7	4.0	4.2	4.5	4.8	28.4	26.0			Tourism budget allocation as % of total budget, media reporting on tourism as an industry/ business
2. Create/amend and restructure the public sector institutions for tourism at all levels	2.1 Obtain cabinet and other approvals for the proposed structures/restructure and commission the drafting of appropriate legislation and/or policies as required.								Cabinet Secretary and PS and TS and Polci and Planning Dept	Legal fees		6.0									New/changed structures approved and legislation drafted by March May 2017.	
	2.2 Pass legislation and adopt policies in required forums.								Cabinet Secretary and PS and TS - Parliament and Council of Governors	No budget - staff, CEOs and Minister's time											New legislation and policies are fully passed/ approved by Mid 2017.	
	2.3 Implement the new structures								Cabinet Secretary, PS & TS, Policy and Planning Dept, Department Heads and CEOs of KTB, TRA and KTF	No budget - staff, CEOs and Minister's time											New and/or revised structures are implemented by end 2018.	
3. Create strong linkages to other Ministries & between counties and national government & entities	3.1 Ensure new policy and/or legislation formalise RTOs and formal links between the Counties and the RTOs, and the RTOs and the Department and kits entities and that the Tourism Coordinating Committee and Inter-Ministerial Committees are also formalised in same policies and legislation (see 2 above)								Cabinet Secretary and PS and TS and Policy and Planning dept	No budget - staff, CEOs and Minister's time											New and/or revised structures are implemented by end 2018.	
4. Develop strong collaborative partnerships with industry	4.1 Ensure new policy and/or legislation formalises RTOs as partnerships with the private sector and that the Tourism Coordinating Committee includes 4 industry representatives Via the NTF (see 2 above)								Cabinet Secretary and PS and TS and Policy and Planning dept	No budget - staff, CEOs and Minister's time											New and/or revised structures are implemented by end 2018.	
	4.2 Foster and encourage collaboration and links with the private sector in various forums and at various levels; eg Advisory Board to the KTB on marketing strategy, for the Convention Bureau with a Business Tourism Advisory Board, at the county level in key tourism counties, on innovation with key private sector tech company partners. Also with training institutions and the HR & skills department, for the TRA on grading criteria.									PS and TS, and KTB, TRA, HR & Skills Dept, Innovation and ICT dept, Counties	No budget - staff time											By 2018 there are appropriate private sector forums interacting with key entities.
	4.3 Strengthen the private sector associations through targeted budget support for approved initiatives, support to smaller and community entities to join associations, encouraging the set up of some associations eg a Business Tourism association and an Attraction association. Encourage all associations to join the KTF and only provide support to KTF member associations. Assist in sourcing association support programmes from NGO funding eg TMEA.									PS and TS, TRA and Policy and Planning Dept		10.5	11.2	11.9	12.7	13.5	14.4	85.2	78.0			By 2018 and onwards there are strong associations in all appropriate sub-sectors which are all KTF members and this is evidenced by membership numbers, budgets, and annual reports.
TOTAL BUDGET IN KSHS											17.5	26.4	19.8	21.1	22.8	24.0	142.4	132.4				
US\$											0.2	0.3	0.2	0.2	0.2	0.2	1.4	1.3				

Kenyan Tourism Strategy 2030 - Implementation Plan - Institution and Stakeholder Strategy

Strategic Thrust	Strategic Action	Timing							Primary Responsibility	Budget Description	Budget (KS millions)								Monitoring & Evaluation
		Year 1	Year 2	Year 3	Year 4	Year 5	Years 6-10	Years 11-14			Base Number	Year 1	Year 2	Year 3	Year 4	Year 5	Years 6-10	Years 11-14	
1. Raise the profile of the tourism industry within Parliament and Cabinet, with the Counties and in the economic and industrial spheres	1.1 Develop a set of accurate and timeous, key tourism indicators and statistics for the tourism industry which can be used in presentations and PR to relevant stakeholders and maintain and enhance on an ongoing basis eg a tourism index, a tourism dashboard.	including development			including a refresh		including a refresh	including a major refresh	Department of Research and Monitoring	Small research and development, and tools budget - mainly staff time		1.75			0.25		0.35	2.5	Tourism budget allocation as % of total budget, media reporting on tourism as an industry/ business
	1.2 Raise awareness and understanding of the tourism industry within Cabinet, the parliamentary tourism committees, and the National Council of Governors by ensuring that tourism is an agenda item, that the CS and Tourism Team speak frequently to the Comitte and the Cabinet								Cabinet Secretary, PS & TS Department Heads and CEOs of KTB, TRA and KTF	No budget - staff and Minister's time									Tourism budget allocation as % of total budget, media reporting on tourism as an industry/ business
	1.3 Raise awareness and understanding of the tourism industry within other relevant national government departments through the interministerial committee								Cabinet Secretary, PS & TS Department Heads and CEOs of KTB, TRA and KTF	No budget - staff, CEOs and Minister's time									Tourism budget allocation as % of total budget, media reporting on tourism as an industry/ business
	1.4 Identify key private sector and government players of influence who understand and support tourism continually lobby to and with them through functions, round tables, dinners and formal meetings to continually position tourism as a top priority								Cabinet Secretary	Entertainment and function budget	3.5	3.7	4.0	4.2	4.5	4.8	28.4	26.0	Tourism budget allocation as % of total budget, media reporting on tourism as an industry/ business
	1.5 Develop specific bilateral relations with other key ministries that have a sgnificant impact on tourism - immigration, transport, education, trade and industry, environmnet and natural resources and sports art and Culture. Regular communication channels should be developed and maintained between these ministries and the Ministry of Tourism to ensure ongoing communication on tourism-related activities and actions.								Cabinet Secretary, PS & TS, Department Heads and CEOs of KTB, TRA and KTF	No budget - staff and Minister's time									Tourism budget allocation as % of total budget, media reporting on tourism as an industry/ business
	1.6 Develop a specific annual PR and lobbying programme to promote financial and business journalism coverage of the Tourism industry and select a PR company to implement								Cabinet Secretary and PS and TS	PR company costs	3.5	3.7	4.0	4.2	4.5	4.8	28.4	26.0	Tourism budget allocation as % of total budget, media reporting on tourism as an industry/ business
2. Create/amend and restructure the public sector institutions for tourism at all levels	2.1 Obtain cabinet and other approvals for the proposed structures/restructure and commission the drafting of appropriate legislation and/or policies as required.							Cabinet Secretary and PS and TS and Polci and Planning Dept	Legal fees		6.0								New/changed structures approved and legislation drafted by March May 2017.
	2.2 Pass legislation and adopt policies in required forums.							Cabinet Secretary and PS and TS - Parliament and Council of Governors	No budget - staff, CEOs and Minister's time										New legislation and policies are fully passed/ approved by Mid 2017.
	2.3 Implement the new structures							Cabinet Secretary, PS & TS, Policy and Planning Dept, Department Heads and CEOs of KTB, TRA and KTF	No budget - staff, CEOs and Minister's time										New and/or revised structures are implemented by end 2018.
3. Create strong linkages to other Ministries & between counties and national government & entities	3.1 Ensure new policy and/or legislation formalise RTOs and formal links between the Counties and the RTOs, and the RTOs and the Department and kits enties and that the Tourism Coordinating Committee and Inter-Ministerial Committes are also formalised in same policies and legislation (see 2 above)							Cabinet Secretary and PS and TS and Policy and Planning dept	No budget - staff, CEOs and Minister's time										New and/or revised structures are implemented by end 2018.
4. Develop strong collaborative partnerships with industry	4.1 Ensure new policy and/or legislation formalises RTOs as partnerships with the private sector and that the Tourism Coordinating Committee includes 4 industry representatives Via the NTF (see 2 above)							Cabinet Secretary and PS and TS and Policy and Planning dept	No budget - staff, CEOs and Minister's time										New and/or revised structures are implemented by end 2018.
	4.2 Foster and encourage collaboration and links with the private sector in various forums and at various levels; eg Advisory Board to the KTB on marketing strategy, for the Convention Bureau with a Business Tourism Advisory Board, at the county level in key tourism counties, on innovation with key private sector tech company partners. Also with training institutions and the HR & skills department, for the TRA on grading criteria.								PS and TS, and KTB, TRA, HR & Skills Dept, Innovation and ICT dept, Counties	No budget - staff time									By 2018 there are appropriate private sector forums interacting with key entities.
	4.3 Strengthen the private sector associations through targeted budget support for approved initiatives, support to smaller and community entities to join associations, encouraging the set up of some associations eg a Business Tourism association and an Attraction association. Encourage all associations to joining the KTF and only provide support to KTF member associations. Assist in sourcing association support programmes from NGO funding eg TMEA.								PS and TS, TRA and Policy and Planning Dept		10.5	11.2	11.9	12.7	13.5	14.4	85.2	78.0	By 2018 and onwards there are strong associations in all appropriate sub-sectors which are all KTF members and this is evidenced by membership numbers, budgets, and annual reports indicating significant performance achievements.

TOTAL BUDGET in KSHS

US\$

17.5 26.4 19.8 21.1 22.8 24.0 142.4 132.4
0.2 0.3 0.2 0.2 0.2 0.2 1.4 1.3

Kenyan Tourism Strategy 2030 - Implementation Plan - Institution and Stakeholder Strategy

Strategic Thrust	Strategic Action	Timing							Primary Responsibility	Budget Description	Budget (KSh millions)							Monitoring & Evaluation				
		Year 1	Year 2	Year 3	Year 4	Year 5	Years 6-10	Years 11-14			Base Number	Year 1	Year 2	Year 3	Year 4	Year 5	Years 6-10		Years 11-14			
1. Raise the profile of the tourism industry within Parliament and Cabinet, with the Counties and in the economic and industrial spheres	1.1 Develop a set of accurate and timeous, key tourism indicators and statistics for the tourism industry which can be used in presentations and PR to relevant stakeholders and maintain and enhance on an ongoing basis eg a tourism index, a tourism dashboard.	including development			including a refresh			including a refresh	including a major refresh	Department of Research and Monitoring	Small research and development, and tools budget - mainly staff time		1.75				0.25		0.35	2.5	Tourism budget allocation as % of total budget, media reporting on tourism as an industry/ business	
	1.2 Raise awareness and understanding of the tourism industry within Cabinet, the parliamentary tourism committees, and the National Council of Governors by ensuring that tourism is an agenda item, that the CS and Tourism Team speak frequently to the Comitee and the Cabinet									Cabinet Secretary, PS & TS Department Heads and CEOs of KTB, TRA and KTF	No budget - staff and Minister's time											Tourism budget allocation as % of total budget, media reporting on tourism as an industry/ business
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	1.4 Identify key private sector and government players of influence who understand and support tourism continually lobby to and with them through functions, round tables, dinners and formal meetings to continually position tourism as a top priority									Cabinet Secretary	Entertainment and function budget	3.5	3.7	4.0	4.2	4.5	4.8	28.4	26.0			Tourism budget allocation as % of total budget, media reporting on tourism as an industry/ business
	1.5 Develop specific bilateral relations with other key ministries that have a significant impact on tourism - immigration, transport, education, trade and industry, environment and natural resources and sports art and Culture. Regular communication channels should be developed and maintained between these ministries and the Ministry of Tourism to ensure ongoing communication on tourism-related activities and actions.									Cabinet Secretary, PS & TS, Department Heads and CEOs of KTB, TRA and KTF	No budget - staff and Minister's time											Tourism budget allocation as % of total budget, media reporting on tourism as an industry/ business
	1.6 Develop a specific annual PR and lobbying programme to promote financial and business journalism coverage of the Tourism industry and select a PR company to implement									Cabinet Secretary and PS and TS	PR company costs	3.5	3.7	4.0	4.2	4.5	4.8	28.4	26.0			Tourism budget allocation as % of total budget, media reporting on tourism as an industry/ business
2. Create/amend and restructure the public sector institutions for tourism at all levels	2.1 Obtain cabinet and other approvals for the proposed structures/restructure and commission the drafting of appropriate legislation and/or policies as required.								Cabinet Secretary and PS and TS and Polci and Planning Dept	Legal fees		6.0										New/changed structures approved and legislation drafted by March May 2017.
	2.2 Pass legislation and adopt policies in required forums.								Cabinet Secretary and PS and TS - Parliament and Council of Governors	No budget - staff, CEOs and Minister's time												New legislation and policies are fully passed/ approved by Mid 2017.
	2.3 Implement the new structures								Cabinet Secretary, PS & TS, Policy and Planning Dept, Department Heads and CEOs of KTB, TRA and KTF	No budget - staff, CEOs and Minister's time												New and/or revised structures are implemented by end 2018.
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4. Develop strong collaborative partnerships with industry	4.1 Ensure new policy and/or legislation formalises RTOs as partnerships with the private sector and that the Tourism Coordinating Committee includes 4 industry representatives Via the NTF (see 2 above)								Cabinet Secretary and PS and TS and Policy and Planning dept	No budget - staff, CEOs and Minister's time												New and/or revised structures are implemented by end 2018.
	4.2 Foster and encourage collaboration and links with the private sector in various forums and at various levels; eg Advisory Board to the KTB on marketing strategy, for the Convention Bureau with a Business Tourism Advisory Board, at the county level in key tourism counties, on innovation with key private sector tech company partners. Also with training institutions and the HR & skills department, for the TRA on grading criteria.									PS and TS, and KTB, TRA, HR & Skills Dept, Innovation and ICT dept, Counties	No budget - staff time											By 2018 there are appropriate private sector forums interacting with key entities.
	4.3 Strengthen the private sector associations through targeted budget support for approved initiatives, support to smaller and community entities to join associations, encouraging the set up of some associations eg a Business Tourism association and an Attraction association. Encourage all associations to join the KTF and only provide support to KTF member associations. Assist in sourcing association support programmes from NGO funding eg TMEA.									PS and TS, TRA and Policy and Planning Dept		10.5	11.2	11.9	12.7	13.5	14.4	85.2	78.0			By 2018 and onwards there are strong associations in all appropriate sub-sectors which are all KTF members and this is evidenced by membership numbers, budgets, and annual reports.
TOTAL BUDGET IN KSHS											17.5	26.4	19.8	21.1	22.8	24.0	142.4	132.4				
US\$											0.2	0.3	0.2	0.2	0.2	0.2	1.4	1.3				

Kenyan Tourism Strategy 2030 - Implementation Plan - Institution and Stakeholder Strategy

Strategic Thrust	Strategic Action	Timing							Primary Responsibility	Budget Description	Budget (KS millions)								Monitoring & Evaluation
		Year 1	Year 2	Year 3	Year 4	Year 5	Years 6-10	Years 11-14			Base Number	Year 1	Year 2	Year 3	Year 4	Year 5	Years 6-10	Years 11-14	
Continuous research and scanning, design thinking and innovation workshops to source intelligence on emerging practices and technologies and new business models	Research & scanning								Innovation & ICT Dept	Small research and seminar/ conference attendance and mainly staff time	6.0	6.4	6.8	7.2	7.7	8.2	48.7	44.5	Constant dissemination of new concepts and ideas - 2 monthly results /ideas communication
	Workshops and design thinking brainstorm								Innovation & ICT Dept	Small budgets for workshops and facilitators	5.6	6.0	6.4	6.8	7.2	7.7	45.5	41.6	Constant dissemination of new concepts and ideas - 2 monthly results /ideas communication
Operate incubators, competitions and challenges, for the tech and tourism industry to ensure a continuous flow of possible new business models, technology and systems.	Operate an incubator								Innovation & ICT Dept	running an incubator for 6 teams over 12 months, but reducing from year 4	762.0	811.5	864.3	920.5	784.2	668.2	3959.0	3620.9	8+ teams operating every - each for 4-12 months and the same number of comprehensive proposals put forward
	Competitions and Challenges								Innovation & ICT Dept	Mainly staff time and small organising and promotion budget	1.8	1.9	2.0	2.2	2.3	2.5	14.6	13.4	6 proposals a year for incubation
Provide seed funding to qualifying projects be a catalyst for tech and innovation entrepreneurs.	Asses projects and provide seed funding to projects with potential and monitor their success. Sell shares/IP in some projects to private investors from year 3								Innovation & ICT Dept	Seed funding for 3 projects a year and staff time		42.0	44.7	47.6	50.7	54.0	320.1	292.8	Sucessful businesses and technology destination applications - 1 -2 a year
TOTAL BUDGET in KSHS										775.4	867.8	924.2	984.3	852.2	740.6	4387.9	4013.2		
US\$										7.8	8.7	9.2	9.8	8.5	7.4	43.9	40.1		

Kenyan Tourism Strategy 2030 - Implementation Plan - Human Resource Strategy

Strategic Thrust	Strategic Action	Timing							Primary Responsibility	Budget Description	Budget (KS millions)							Monitoring & Evaluation							
		2017	2018	2019	2020	2021	2022-2026	2027-2030			Base Number	2017	2018	2019	2020	2021	2022-2026		2027-2030						
1	Quality Tertiary Level Training										2,254	-	217	239	236	238	1,269	1,336							
		1	Conduct a national tourism skills audit							Ministry of Tourism to appoint service provider	Professional fees	14		15					-	-	Approval of audit report				
		2	Conduct a national tourism training institutions audit and assess the need to rationalise the number of institutions that offer tourism training							Ministry of Tourism to appoint service provider	Professional fees	14		15						-	-	Approval of report			
		3	Conduct a national review of tourism training curricula							Ministry of Tourism to appoint service provider	Professional fees	14		15							-	-	Approval of report		
		4	Formulate a national tourism human resource development strategy							Ministry of Tourism to appoint service provider	Professional fees	14			16						-	-	Approval of strategy		
		5	Formulate minimum standards for tourism and hospitality training courses, including making practical training compulsory for all tourism students							Ministry of Education	Professional fees	7			8							-	-	Approval of minimum standards	
		6	engage							Ministry of Tourism	Time costs	-										-	-	Minutes of meetings	
		7	Set minimum entrance requirements for tourism students							Ministry of Education	Time costs	-										-	-	Approval of minimum entrance requirements	
		8	Set minimum requirements for tourism trainers							Ministry of Education	Time costs	-										-	-	Approval of minimum requirements	
		9	Conduct regular curricula reviews							Ministry of Education	Professional fees	11				6			9			-	-	Approval of review reports	
		10	Develop relevant refresher and short courses							Ministry of Education	Professional fees	11			6	6						-	-	Approval of course content	
		11	Clarify and refine the roles of the relevant Ministries and institutions responsible for tourism training accreditation							See institutional & stakeholder strategy	Incl in institutional	-											-	-	
		12	Improve access to funding for tourism studies							Ministry of Tourism	Funding support, e.g. bursaries	700			57	61	65	69		420				445	Amount of funding disbursed
		13	Re-establish Kenya Utalii College as a centre of training excellence							Kenya Utalii College	Supplementary budget	1,050			86	92	98	104		630				668	
		14	Stimulate post-graduate studies in tourism							Ministry of Tourism	Research grants	350			29	31	33	35		210				223	Number of post-graduate students
15	Create partnerships with internationally renowned tourism and hotel schools							Training institutions	Stakeholder engagement costs	70				26	28	30		-			-	-	Number of partnership agreements		
2	Quality People Working in Tourism										1,064	-	19	115	106	113	683	724							
		1	Set standards for continuous professional development							Ministry of Education	Time costs	-												Approval of standards	
		2	Develop relevant refresher and short courses							Ministry of Education	Incl above	-												See above	
		3	Create mechanisms for self-assessment of skills by industry professionals							Ministry of Education	Professional fees	14			16									Approval of self-assessment mechanism	
		4	Develop and implement tourism mentorship programmes							Ministry of Tourism to appoint service provider	Hard costs	420			40	42	45	273	290					Number of people mentored	
		5	Recognise talent through an industry awards programme							Ministry of Tourism	Hard costs	105		9	10	11	11	68	72					supported	
		6	Develop and implement enterprise support programmes							Ministry of Tourism	Hard costs	420			40	42	45	273	290					supported	
7	Develop and implement tour/driver guide training programmes							Training institutions	Hard costs	105		9	10	11	11	68	72					Number of people trained			
3	Tourism Awareness and Understanding										441	-	25	39	41	44	267	283							
		1	Develop and implement tourism awareness programmes for Kenyans							Ministry of Tourism	Hard costs	91		7	8	8	9	55	58					Approval of programme	
		2	Develop and implement tourism awareness programmes for school learners							Ministry of Tourism	Hard costs	91		7	8	8	9	55	58					Approval of programme	
		3	Develop and implement tourism awareness programmes for the media							Ministry of Tourism	Hard costs	91		7	8	8	9	55	58					Approval of programme	
		4	Develop and implement tourism awareness programmes for immigration officials							Ministry of Tourism	Hard costs	35		3	3	3	3	21	22					Approval of programme	
		5	Develop and implement tourism awareness programmes for government – see 'Capacity building for government' strategic thrust							See below	Incl below	-													See below
		6	subjects)							Ministry of Education	Time costs	-													school subject
		7	Promote tourism as a career of choice							Ministry of Tourism	Hard costs	21			2	2	2	14	14						tertiary institutions
		8	Raise the profile of tourism at government level							Ministry of Tourism	Hard costs	21			2	2	2	14	14						tertiary institutions
9	Promote the benefits of tourism through sound market and economic research							Ministry of Tourism to appoint service provider	Professional fees	91			8	8	9	55	58						Number of research studies completed		
4	Quality Experiences and Service Excellence										630	-	19	60	63	68	410	434							
		1	Develop and implement a tourism industry awards programme for facilities, services and people in the tourism industry							Ministry of Tourism	Hard costs	105		9	10	11	11	68	72					Approval of programme	
		2	Develop and implement a tourism service excellence training programme							Ministry of Tourism to appoint service provider	Hard costs	420			40	42	45	273	290					Approval of programme	
		3	Develop and implement a mystery guest programme							Ministry of Tourism to appoint service provider	Hard costs	105		9	10	11	11	68	72					Approval of programme	
4	Ensure that people in tourism are passionate and adequately trained/skilled to work in the industry – see 'Quality tertiary level training' and 'Quality people working in tourism' strategic thrusts							See above	Incl above	-													See above		
5	Capacity Building for Communities										420	-	32	37	39	42	252	267							
		1	Conduct an audit of existing community-based tourism projects to identify skills-related challenges and support requirements							Ministry of Tourism to appoint service provider	Incl above	-												Approval of audit report	
		2	Provide training for local communities on the basics of tourism and running a tourism business							Ministry of Tourism to appoint service provider		210		16	18	20	21	126	134					Number of people trained	
3	Develop and implement a mentorship/coaching programme to match industry experts with community-based tourism projects							Ministry of Tourism to appoint service provider		210		16	18	20	21	126	134						Number of mentees		
6	Capacity Building for Government										3,617	-	296	316	336	358	2,171	2,302							
		1	Conduct an assessment of tourism-related skills availability/quality at County level							See above	Incl above	-												Approval of report	
		2	Set minimum job specifications and requirements for tourism officials							Ministry of Tourism	Time costs	-												Approval of standards	
		3	Promote the benefits of tourism through sound market and economic research							See above	Incl above	-												Number of research studies completed	
		4	Develop a programme to train County officials and politicians on the basics of tourism							Ministry of Tourism	Venue & trainer costs	3,208		263	280	298	317	1,925	2,041						Number of people trained
5	Develop a programme to train government officials that interact with the tourism industry/tourists on the basics of tourism, e.g. museum curators, immigration officials, Kenya Wildlife Service entrance gate staff etc.							Ministry of Tourism to appoint service provider	Venue & trainer costs	410		34	36	38	41	246	261						Number of people trained		

TOTAL BUDGET in KSHS

US\$

Ministry of Tourism in KSHS

8426.3 0.0 607.9 805.2 821.6 861.4 5050.2 5346.7

84.3 0.0 6.1 8.1 8.2 8.6 50.5 53.5

7124.3 0.0 509.7 644.3 669.3 712.8 4322.2 4583.8

Kenya Tourism Strategy 2030 - Implementation Plan - Product Strategy

Diversify - Priority Strategic Thrusts

Tourism Experience	Strategic Thrust	Strategic Action	Timing							Primary Responsibility	Budget Description	Budget (KS millions)							Monitoring & Evaluation					
			2017	2018	2019	2020	2021	2022-2026	2027-2030			Base Number	2017	2018	2019	2020	2021	2022-2026		2027-2030				
African Safari	1	Develop facilities and activities	1	Diversify the accommodation base in national reserves/parks and conservation/protected areas, e.g. self-catering, expand and upgrade camping facilities							Reserve authority	Hard infrastructure costs	1,050	0	0	820	1,297	1,381	0	0	Number of facilities developed			
			2	Develop one or more visitor centres at strategic locations to serve as activity hubs (with activity operators and guides), information centres and provide services to visitors (i.e. food and beverages, shopping such as crafts and basic provisions)							Counties	Hard infrastructure costs	700			423	450					Number of centres developed		
			3	Improve the provision of visitor facilities within reserves such as picnic facilities, bird hides etc.								Reserve authority	Hard infrastructure costs	350			132	141	150				Number of facilities developed	
			4	Enhance existing activities and introduce new activities in reserves, such as game drives, biking, walking, cultural experiences, special interest tours (e.g. birds, trees, insects), etc.								Reserve authority	Hard infrastructure costs	700			265	282	300				Number of activities developed	
			5	Develop a visitor information and interpretive strategy and policy (includes directional, information and interpretive signage)								Reserve authority	Time costs	0									Approval of policy	
			6	Improve the extent and quality of visitor information provided for when in the reserves, e.g. improved visitor guides, additional and better quality maps with suggested routes and travel times								Reserve authority	Hard costs	35			13	14	15					Number of guides & maps developed
			7	Enhance existing and develop new community-based tourism experiences, e.g. home stays, community projects, activities, indigenous nurseries etc.								Counties	Funding support	35			13	14	15					Number of community projects developed
			8	Enhance existing and develop new events – see Events Strategy								See Events Strategy	Incl in events	0										See Events Strategy
	2	Develop niche tourism	1	Enhance existing and develop new niche tourism products, including avitourism, photography, voluntourism, flora, entomology, scientific research, film							Counties	Hard infrastructure costs	700	0	0	0	85	90	546	579	579	Number of new products developed		
	Beach & Marine	1	Develop beach nodes	1	Further develop and implement a Kenyan branded coastal destination							RTOs	Hard infrastructure costs	3,500			361	384	409	2,482	2,632	Development of branded destination		
2				Establish Lamu as an authentic cultural beach node							Counties	Hard infrastructure costs	700			85	90	546	579	579	Development of Lamu			
3				Establish Gazi as a beach tourism node							Counties	Hard infrastructure costs	700				100	607	643	643	Development of Gazi			
2		Develop facilities and activities	1	Conduct a tourism accommodation audit, determine and set capacity limits by type and standard of accommodation for new developments							RTOs	Professional fees	14									Approval of audit		
			2	Identify gaps in the supply of new types and standards of accommodation that may be required, e.g. self-catering and timeshare facilities							See above	Incl above	0									See above		
			3	Conduct feasibility studies for the establishment of new accommodation facilities							Counties	Professional fees	18			7	7	8					Number of studies completed	
			4	Enhance existing and develop new activities at beach nodes and marine parks and reserves, such as beach sports, water sports, recreation facilities, washrooms, shopping, entertainment and eating out							Counties	Hard infrastructure costs	700			66	70	75	455	483	483	Number of new activities developed		
			5	Develop a visitor information and interpretive strategy and policy (includes directional, information and interpretive signage)							RTOs	Time costs	0										Approval of policy	
3		Develop niche tourism	1	Enhance existing and develop new niche tourism products, including scuba diving, water sports, cruise tourism and fishing							Counties	Hard infrastructure costs	350	0	0	44	47	50	303	322	322	Number of new products developed		
Wildlife/Nature/Scenic		1	Develop drawcard products	1	Conduct feasibility studies for the development of drawcard tourism products and implement the viable projects, i.e.: lakeside resorts, visitor interpretive centres, hanging path/forest canopy trail at Kakamega Forest							RTOs	Professional fees	18			10	11	0	0	0	Number of studies completed		
	1			Enhance existing and develop new wildlife/nature activities around Lake Victoria and Lake Turkana such as walking trails, glass bottom boat rides, birding, fishing etc.							Counties	Hard infrastructure costs	700			66	70	75	455	483	483	Number of new activities developed		
	2	Develop activities	2	Link wildlife/nature-based activities at Lake Victoria and Lake Turkana to cultural tourism experiences, e.g. Tilapia catch and eat experience, traditions, myths and legends associated with the lakes and local cultures etc.							Counties	Hard infrastructure costs	350			132	141	150				Number of new experiences developed		
			3	Enhance existing and develop new wildlife/nature activities at Samburu and the Mijikenda Kaya Forests such as game drives, wildlife tracking, photography etc.							Counties	Incl above	0									Number of new activities developed		
			4	Link wildlife/nature-based activities at the Mijikenda Kaya Forests to cultural tourism experiences, e.g. traditional belief systems etc.							Counties	Incl above	0									Number of new activities developed		
			5	Better leverage the World Heritage Status of the Mijikenda Kaya Forests							See Marketing Strategy	Incl in marketing budget	0										Number of visitors to Mijikenda	
6	Develop scenic routes with visitor stops and interpretation in priority areas							Counties	Hard infrastructure costs	140				17	18	109	116	116	116	Number of routes & stops developed				

Kenya Tourism Strategy 2030 - Implementation Plan - Product Strategy

Cross Cutting Strategic Thrusts

Strategic Thrust	Strategic Action	Timing							Primary Responsibility	Budget Description	Budget (KS millions)								Monitoring & Evaluation	
		2017	2018	2019	2020	2021	2022-2026	2027-2030			Base Number	2017	2018	2019	2020	2021	2022-2026	2027-2030		
1	Events Strategy	1	Compile a database of tourism-related events taking place across Kenya							Ministry of Tourism to appoint service provider	Professional fees	4,211	11	-	953	1,015	1,081	2,456	-	Approval of database
		2	Classify events by type and significance (i.e. international, regional, national, local and community)							Ministry of Tourism to appoint service provider	Incl above	-								See above
		3	Identify existing events with potential to grow in significance and develop strategies to achieve growth							Ministry of Tourism to appoint service provider	Incl above	-								Approval of strategies
		4	Improve the geographic spread of events							RTOs		-								Number of events held outside of main cities
		5	Improve the spread of events during the year							RTOs		-								Number of events held each month of the year
		6	Create signature events							RTOs	Funding support	2,100			476	507	540	1,228		Number of signature events held
		7	Identify important sporting codes that are already established in Kenya and bring World Championship events to Kenya, e.g. athletics							Ministry of Tourism	Funding support	2,100			476	507	540	1,228		Number of World Championships held
		8	Develop an events policy (classification of events, funding mechanisms, support that can be provided at national and county level etc.)							Ministry of Tourism to appoint service provider	Incl above	-								Approval of events policy
2	Quality Experiences & Service Excellence	1	Ensure compliance with tourism grading legislation							Ministry of Tourism	Time costs	420	30	32	34	36	39	234	248	Number of graded establishments
		2	Monitor customer feedback on the quality of tourism products in Kenya and develop mechanisms to address negative feedback							Ministry of Tourism	Time costs	-								Approval of customer feedback reports & number of complaints addressed
		3	Develop and implement a tourism industry awards programme for facilities, services and people in the tourism industry							Ministry of Tourism	Hard costs	105	8	8	9	9	10	59	62	Approval of awards programme
		4	Develop and implement a tourism service excellence training programme							Ministry of Tourism	Hard costs	210	15	16	17	18	19	117	124	Number of people trained
		5	Develop and implement a mystery guest programme							Ministry of Tourism		105	8	8	9	9	10	59	62	Number of mystery guest visits
		6	Implement the refurbishment fund to address product quality issues							Ministry of Tourism	Incl in beach & marine strategy	-								Approval of funding applications
		7	Ensure that people in tourism are passionate and adequately trained/skilled to work in the industry – see HR Strategy							See HR Strategy	Incl in HR strategy	-								See HR Strategy
3	Promote Community-based Tourism	1	Conduct an audit of existing community-based tourism projects to identify challenges and support requirements							Ministry of Tourism to appoint service provider	Professional fees	413	-	48	36	38	41	246	261	Approval of audit report
		2	Encourage the development of quality home stay products							RTOs	Hard costs	273		22	24	25	27	164	174	Number of graded home stay products
		3	Provide training for local communities on the tourism industry – see HR Strategy							See HR Strategy	Incl in HR strategy	-								See HR Strategy
		4	Link community-based tourism projects to voluntourism packages							See Marketing Strategy	Incl in marketing strategy	-								Number of community projects included in packages
		5	Develop and implement a mentorship/coaching programme to match industry experts with community-based tourism projects							Ministry of Tourism		126		11	12	13	14	82	87	Number of mentees
		6	Identify barriers to entry and develop mechanisms to address challenges, e.g. skills, funding etc.							See above	Incl under audit	-								Approval of report
4	Promote Responsible Tourism (Sustainability)	1	Encourage tourism products to join eco-accreditation programmes, e.g. Ecotourism Kenya certification programme							RTOs	Time costs	56	1	16	4	4	4	25	27	Number of certified products
		2	Assess current status of government owned or managed tourism assets and develop a Responsible Tourism Improvement Plan							Ministry of Tourism to appoint service provider	Professional fees	14		14						Approval of plan
		3	Create visitor awareness of responsible behaviour in communities and the environment							Ministry of Tourism	Hard costs	14		1	1	1	1	8	9	Approval of visitor awareness programme
		4	Facilitate awareness and capacity-building on responsible tourism for government tourism officials and tourism marketing organisations							Ministry of Tourism	Hard costs	14	1	1	1	1	1	8	8	Number of people trained
		5	Provide support (e.g. training, information sources) to tourism businesses and communities to enable implementation of responsible tourism practices							RTOs	Funding support	14			1	1	2	9	10	Number of businesses supported
		6	Embed Responsible Tourism messaging in marketing activities							See Marketing Strategy	Incl in marketing strategy	-								See Marketing Strategy
		7	Develop national minimum standards for responsible tourism							Ministry of Tourism	Time costs	-								Approval of standards

TOTAL BUDGET in KSHS

US\$

Ministry of Tourism

RTOs

Counties

Other

Total

5099.5	41.5	96.6	1026.2	1092.9	1163.9	2961.3	535.6	
51.0	0.4	1.0	10.3	10.9	11.6	29.6	5.4	
2712.5	41.5	74.3	524.7	558.8	595.1	1560.2	352.2	53%
2387.0	0.0	22.4	501.5	534.1	568.8	1401.0	183.4	47%
0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
5099.5	41.5	96.6	1026.2	1092.9	1163.9	2961.3	535.6	

Summary Budget								
KS (millions)	Year 1	Year 2	Year 3	Year 4	Year 5	Years 6-10	Years 11-14	Grand Total
Improve Existing	2,799	4,305	4,898	1,186	797	-	-	13,985
Diversify	-	11	1,519	2,256	2,491	5,777	6,126	18,179
Cross Cutting	42	97	1,026	1,093	1,164	2,961	536	6,918
Total	2,841	4,413	7,442	4,534	4,452	8,738	6,662	39,082

35.8%
46.5%
17.7%

Budgets by Tourism Experience								
KS (millions)	Year 1	Year 2	Year 3	Year 4	Year 5	Years 6-10	Years 11-14	Grand Total
African Safari	51	407	1,647	2,176	1,859	546	579	7,265
Get the Masai Mara right	51	258	667	626	208	-	-	1,810
Elevate Amboseli's status to 'must see'	-	75	79	85	90	-	-	329
Develop niche tourism	-	75	79	85	90	-	-	329
Develop facilities and activities	-	-	820	1,297	1,381	-	-	3,498
Develop niche tourism	-	-	-	85	90	546	579	1,300
Beach & Marine	2,588	3,022	3,696	709	849	4,393	4,659	19,916
Refresh and revamp tired beach products	233	435	463	-	-	-	-	1,131
Enhance priority beach nodes	2,354	2,512	2,676	31	27	-	-	7,600
Develop niche tourism	-	75	79	85	90	-	-	329
Develop beach nodes	-	-	361	469	599	3,635	3,855	8,919
Develop facilities and activities	-	-	73	78	83	455	483	1,170
Develop niche tourism	-	-	44	47	50	303	322	766
Wildlife/Nature/Scenic	140	429	665	556	581	837	888	4,096
Enhance iconic scenic tourism experiences	56	153	163	173	185	-	-	730
Develop activities	84	276	294	101	108	-	-	863
Interpretation	-	-	-	-	-	-	-	-
Develop niche tourism	-	-	-	-	-	-	-	-
Develop drawcard products	-	-	10	11	-	-	-	20
Develop activities	-	-	198	228	243	564	598	1,833
Develop niche tourism	-	-	-	42	45	273	290	650
Business Tourism	21	458	409	-	-	-	-	888
Business tourism strategy	21	-	-	-	-	-	-	21
Refresh and revamp existing key facilities	-	447	397	-	-	-	-	844
Develop key new facilities	-	11	12	-	-	-	-	23
All Experiences	42	97	1,026	1,093	1,164	2,961	536	6,918
Events strategy	11	-	953	1,015	1,081	2,456	-	5,515
Quality experiences and service excellence	30	32	34	36	39	234	248	653
Promote community-based tourism	-	48	36	38	41	246	261	669
Promote responsible tourism (sustainability)	1	16	4	4	4	25	27	81
Total	2,841	4,413	7,442	4,534	4,452	8,738	6,662	39,082

18.6%
51.0%
10.5%
2.3%
17.7%

Budgets by Responsible Entity								
KS (millions)	Year 1	Year 2	Year 3	Year 4	Year 5	Years 6-10	Years 11-14	Grand Total
Ministry of Tourism	296	323	810	581	610	1,560	352	4,533
RTOs	21	608	1,496	946	996	3,883	2,816	10,765
Counties	2,494	3,016	3,540	1,375	1,558	3,185	3,378	18,546
Other	30	467	1,596	1,633	1,288	109	116	5,239
Total	2,841	4,413	7,442	4,534	4,452	8,738	6,662	39,082

11.6%
27.5%
47.5%
13.4%



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