

REPUBLIC OF KENYA



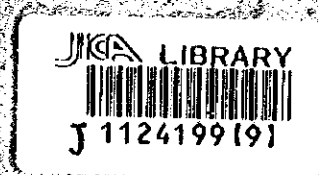
THE STUDY ON THE NATIONAL TOURISM MASTER PLAN IN THE REPUBLIC OF KENYA

Kenya

(Volume 1)

MASTER PLAN FOR
NATIONAL TOURISM DEVELOPMENT

OCTOBER 1995



JAPAN INTERNATIONAL
COOPERATION AGENCY

MINISTRY OF TOURISM
AND WILDLIFE

PACIFIC CONSULTANTS INTERNATIONAL
NIPPON KOEI CO., LTD

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JAPAN INTERNATIONAL COOPERATION AGENCY (JICA)

MINISTRY OF TOURISM AND WILDLIFE
THE GOVERNMENT OF THE REPUBLIC OF KENYA

**THE STUDY
ON
THE NATIONAL TOURISM MASTER PLAN
IN
THE REPUBLIC OF KENYA**

National Tourism Development Master Plan

Final Report (Volume 1)

October 1995

**PACIFIC CONSULTANTS INTERNATIONAL
NIPPON KOEI CO., LTD.**



The following foreign exchange rate is applied in the study:

USD\$ 1.00 = 50 Ksh = 25 K£

Preface

In response to a request from the Government of the Republic of Kenya, the Government of Japan decided to conduct "The Study on National Tourism Master Plan in the Republic of Kenya" and entrusted the Study to the Japan International Cooperation Agency (JICA).

JICA sent to the Republic of Kenya a study team headed by Mr. TADASHI KUME, and composed of members of Pacific Consultants International, and Nippon Koei Co.Ltd., three times between March 1994 and August 1995.

The team held discussions with the officials concerned of the Government of Kenya and conducted field surveys at the study area. After the team returned to Japan, further studies were made and the present report was prepared.

I hope that this report will contribute to the promotion of the project and to the enhancement of friendly relations between our two countries.

I wish to express my sincere appreciation to the officials concerned of the Government of the Republic of Kenya for their close cooperation extended to the team.

October 1995



Kimio Fujita
President

Japan International Cooperation
Agency

October 1995

Mr. Kimio Fujita
President
Japan International Cooperation Agency
Tokyo, Japan

Letter of Transmittal

Dear Sir:

We are pleased to formally submit herewith the final report of "The Study on National Tourism Master Plan in the Republic of Kenya".

This report compiles the results of the study which was undertaken in the Republic of Kenya, from March 1994 to August 1995 by the Study Team, organised jointly by Pacific Consultants International and Nippon Koei.

We owed a lot to many peoples for the accomplishment of this report. First, we would like to express our deep appreciation and sincere gratitude to all those extended their kind assistance and cooperation to the Study Team, in particular, officials concerned of Ministry of Tourism and Wildlife, the Republic of Kenya, and Kenyan Counterpart Team.

We also acknowledge the officials of your agency, the JICA Advisory Committee and the Embassy of Japan in the Republic of Kenya.

We wish the report would be able to contribute really to Kenya's peoples and socio-economic development in future.

Very truly yours,



Tadashi Kume
Team Leader
The Study Team for the Study on
National Tourism Development
Master Plan in the Republic of Kenya

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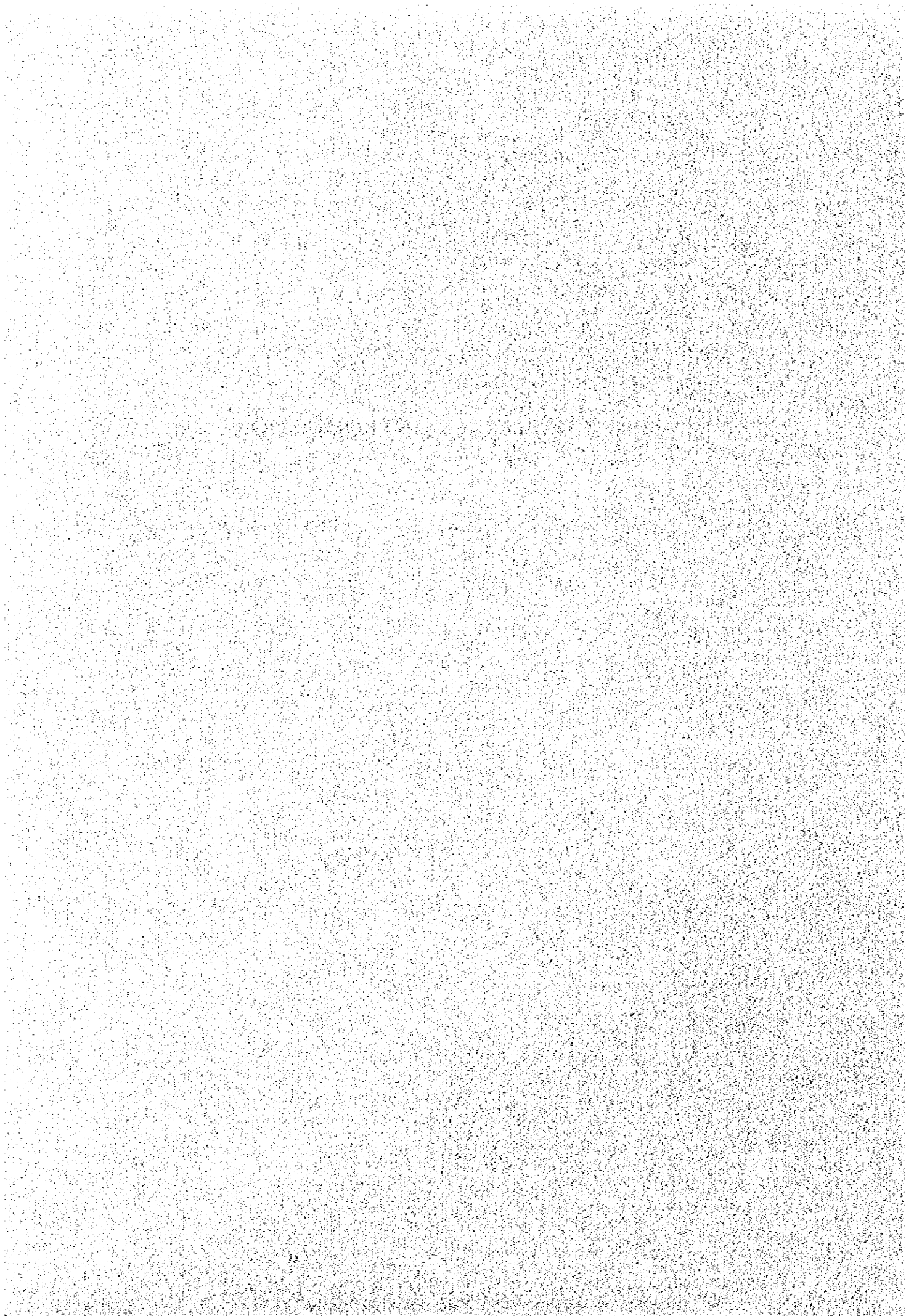
Abbreviations

ASAL	Arid and Semi-Arid Land
AT & H	African Tours and Hotels
B/C	Benefit Cost Ratio
BOD	Biochemical Oxygen Demand
CC	County Council
CITES	Convention on International Trade in Endangered Species (Fauna and Flora)
COBRA	Conservation of Biodiverse Resource Areas
COD	Chemical Oxygen Demand
COR	Capital Output Ratio
DDC	District Development Committee
DRSRS	Department of Resource Surveys and Remote Sensing
EANHS	East Africa Natural History Society
EC	European Community
EIA	Environment Impact Assessment
EPZ	Export Processing Zone
FAO	Food and Agriculture Organisation of the United Nations
FD	Forest Department
FR	Forest Reserve
GDP	Gross Domestic Product
GEF	Global Environment Facility
GFCF	Gross Fixed Capital Formation
GOK	Government of Kenya
ICOR	Incremental Capital Output Ratio
IDA	International Development Association
IEE	Initial Environment Examination
IPCC	Intergovernmental Panel on Climate Change
IUCN	World Conservation Union
JICA	Japan International Cooperation Agency
KATA	Kenya Association of Travel Agents
KATO	Kenya Association of Tour Operators
KIFCON	Kenya Indigenous Forest Conservation Project
KNM	Kenya National Museums
KPLC	Kenya Power and Lighting Company
KPTC	Kenya Posts and Telecommunication Corporation
KR	Kenya Railway Corporation
KREMU	Same as DRSRS
KSS	Kenya Soil Survey
KTDC	Kenya Tourist Development Corporation
KWS	Kenya Wildlife Service

LG	Local Government
LS	Local Sanctuary
MENR	Ministry of Environment and Natural Resources
MNP	Marine National Park
MNR	Marine National Reserve
MOALDM	Ministry of Agriculture, Livestock Development and Marketing
MOED	Ministry of Education
MOE	Ministry of Energy
MOENR	Ministry of Environment and Natural Resources
MOF	Ministry of Finance
MOFIC	Ministry of Foreign Affairs and International Cooperation
MOH	Ministry of Health
MOHANH	Ministry of Home Affairs and National Heritage
MOLRRWD	Ministry of Land Reclamation, Regional and Water Development
MOLS	Ministry of Land and Settlement
MOPWH	Ministry of Public Works and Housing
MOTC	Ministry of Transport and Communication
MOTW	Ministry of Tourism and Wildlife
MRST	Ministry of Research, Science and Technical Training
NEAP	National Environmental Action Plan
NGO	Non-Governmental Organisation
NP	National Park
NPV	Net Present Value
NR	National Reserve
NS	National Sanctuary
NWCPC	National Water Conservation and Pipeline Corporation
NWMP	National Water Master Plan
OCC	Opportunity Cost of Capital
ODA	Overseas Development Administration
OP	Office of President
OVP&MPND	Office of Vice President & Ministry of Planning and National Development
PAC	Problem Animal Control
PAWS	Protected Area and Wildlife Service
PIP	Public Investment Programme
PTDA	Priority Tourism Development Area
SME	Small and Medium-sized Enterprise
SSC	Species Survival Commission
TPZ	Tourism Promotion Zone
TRAFFIC	Trade Records Analysis of Flora and Fauna in Commerce
TRH	Trade, Restaurant and Hotel
TZ	Tourism Zone

UNDP	United Nations Development Programme
UNEP	United Nations Environment Programme
UNESCO	United Nations Education and Scientific Organisation
USAID	United States Agency for International Development
VAT	Value Added Tax
WCI	Wildlife Conservation International
WWF	World Wide Fund for Nature

CHAPTER 1 INTRODUCTION



Chapter 1 Introduction

1. Background of the Study

Tourism has played a vital role in Kenya's economic development, as it has contributed significantly to foreign exchange earnings and to the creation of wage employment. Total tourist arrivals (classified by the immigration office as "holiday"/" business" arrivals) increased from 65,000 in 1963 to 777,400 tourists in 1993. The tourism sector generated 1,083.5 million Kenyan £ (approximately 421.5 million US \$, if converted at the 1993 mean exchange rate of 1 US \$ = KSh. 58.001) in 1993, equivalent to more than 34% of the country's total foreign exchange earnings in that year. In terms of employment, the tourism sector is estimated to have accounted for about 9% of total wage employment in that year.

In spite of past achievements, many constraints to further development still remain to be removed. Most of all, over-concentration of tourists in certain tourist destinations and uncoordinated environmental management are key issues. The Government of Kenya expects the tourism sector to create wage employment in rural areas and contribute to regional development. However, the sustainable use of tourism resources and a better spatial distribution of tourists should be considered on a long-term basis.

In this context, the Government of Kenya requested the Government of Japan to assist in formulating a comprehensive national Tourism Master Plan. In response to the request, the Japan International Cooperation Agency (hereinafter referred to as JICA) dispatched a preliminary study team headed by Mr. Masayasu Kokubo. The aim of this study was to justify and design a Master Plan study through field investigations and in close co-operation with the Government of Kenya, in particular with the Ministry of Tourism and Wildlife (hereinafter referred to as MOTW). The preliminary study team agreed on the Scope of Work of the Master Plan study with MOTW on 24 November 1993. Subsequently, a consultant team was selected and dispatched by JICA to carry out the full-scale study beginning in February 1994.

2. Objectives of the Study

Taking into account the situation described above, the objectives of the study were to:

- Prepare a long term tourism development strategy,
- Formulate the national tourism development master plan, and
- Formulate tourism development plans for priority zones.

It was agreed that in the early stage of the study the entire nation of Kenya was to be covered. Later on, the study was to concentrate on priority zones chosen in the course of study implementation.

The plan is to be formulated with the target year of 2010, and the year 2000 as the intermediate target for the plan, respectively.

3. The Study Area and Tourism Zones

3.1. Study Area

As mentioned above, initially the study area was to cover the whole Republic of Kenya.

Subsequently, the study team employed a zoning system to analyse regional tourism characteristics. This zoning system is based, in principle, on existing administrative boundaries, climatic/geographical features, the nature of tourism resources and the criteria of accessibility.

According to such zoning system, Kenya is composed of two levels of tourism zones, that is eight principal tourism regions and 35 tourism areas as shown in Figure 1.1.

To identify potential places for accumulating tourism facilities with an appropriate environmental control, tourism sub-areas were set-up in the tourism areas.

3.2. Planning Level by Tourism Region, Tourism Area and Tourism Sub-Area

Tourism plan was formulated for each level of the Tourism Region, Tourism Area and Tourism Sub-Area. Table 1.1 shows main discussions made in the study by the planning level.

Figure 1.1 Tourism Regions and Areas

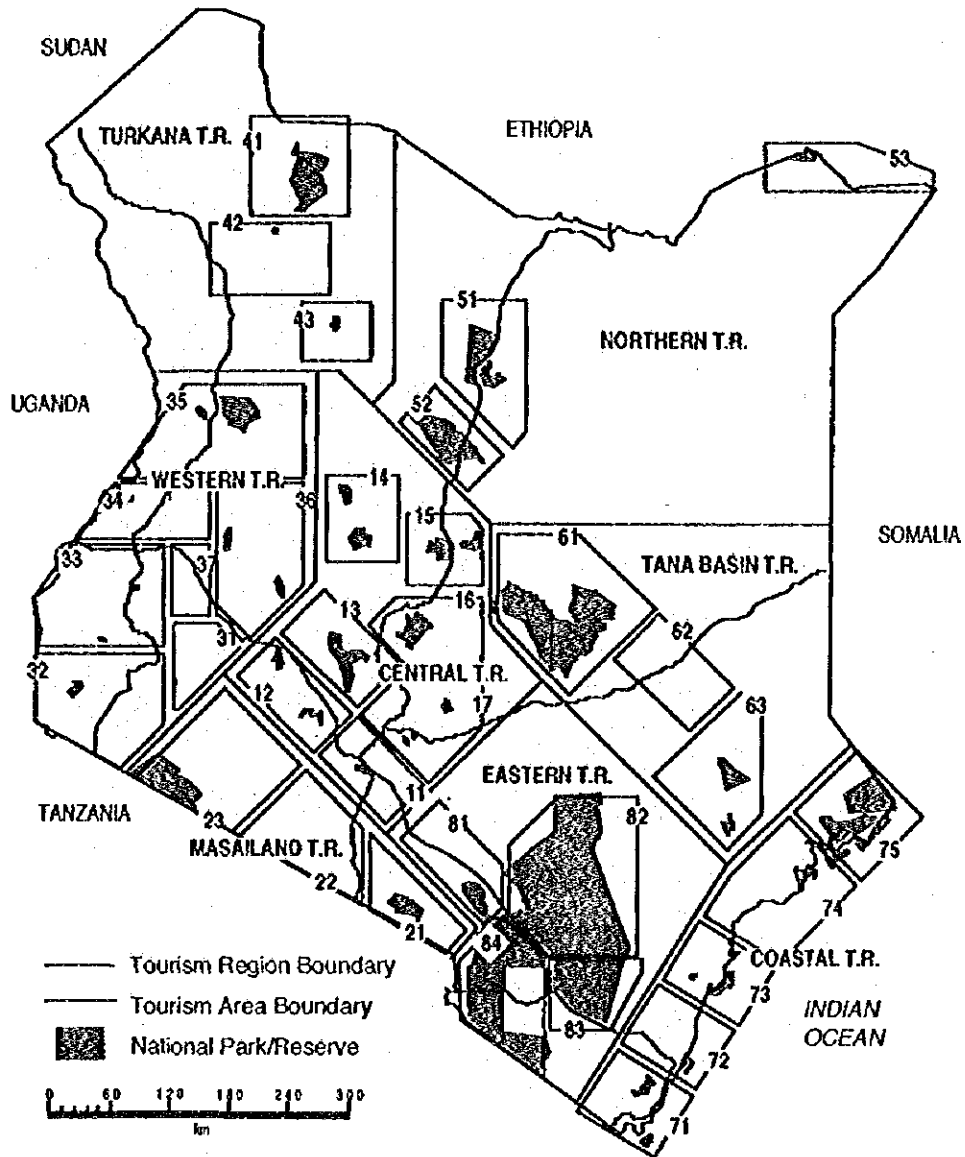
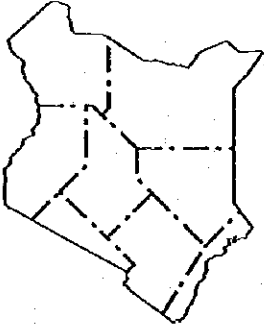
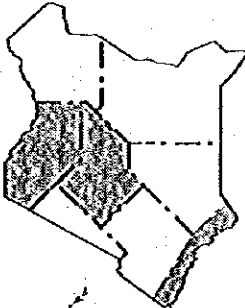
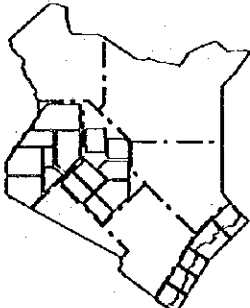
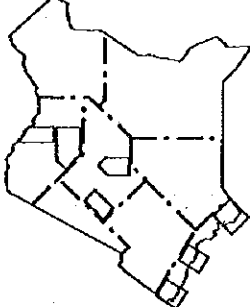


Table 1.1 Main Discussion made in the Study by the Planning Level

	Planning Level	Main Discussions
National	<p>Example</p>  <p>8 Tourism Regions</p>	<ul style="list-style-type: none"> • National Tourism Strategies • Spatial Development Plan • Tourism Management and Promotion Plan • Physical Development Plan • Environmental Conservation and Management Plan • Economic Financial Analysis • Selection of Priority Tourism Regions
Tourism Region	 <p>3 Tourism Regions Priority</p>	<ul style="list-style-type: none"> • Detailed Tourism Master Plan • Tourism Product Plan • Environmental Consideration • Supporting Infrastructure Plan (Transport Network) • Cost Estimates of Tourism Products and Tourism Facilities • Economic and Financial Analysis • Selection of Priority Tourism Areas
Tourism Area	 <p>21 Tourism Areas</p>	<ul style="list-style-type: none"> • Tourism Facilities Plan • Tourism Cores Development Concept • Cost Estimates of Tourism Products and Facilities • Economic and Financial Analysis • Selection of Priority Tourism Sub-Areas
Tourism Sub-Area	 <p>From 7 Tourism Sub-Areas, Tourism Promotion Zones are Identified.</p>	<ul style="list-style-type: none"> • Land Use Plan (Selection of Tourism Promotion Zone etc.) • Tourism Facilities Plan • Supporting Infrastructure Plan (Access Road, Water Supply, Sewerage, Solid Waste, Power and Communications) • Cost Estimates of Supporting Infrastructure • IEE • Project Profile

4. Implementation of the Study

4.1. Study Organisation and Participants

The study was conducted by the JICA study team with the participation of a counterpart team, composed of representatives from MOTW and relevant Ministries. A Steering Committee was established by the Kenyan side to provide comments on the study, and a JICA Advisory Committee was also established by the Japanese side.

4.1.1. Members of Kenyan Steering Committee

	Name	Position
Chairman	Mr. S.M.Mbova	Permanent Secretary, Ministry of Tourism and Wildlife (MOTW). ~ Jan. 1995)
Member	(Eng. A.M.H.Sharawe	
	Mr. O. Kenani	Deputy Chief Economist, MOTW. ~ Oct. 1994)
	(Mr.Z.E. Gichohi	
	Mr. M. Mbui	Ag. Director of Tourism, MOTW. ~ June 1995)
	(Mr. G.N. Macharia	
	Mr. Nigel Carpenter	Deputy Director (Commercial), Kenya Wildlife Service
	Mr. Njeru Kirira	Chief Executive, Kenya Association of Hotel Keepers and Caterers.
	Mr. Mutua P. Nzoka	Loans Manager, Kenya Tourism Development Corporation.
	Mr. J. N. Kaniithi	Desk Officer Japan, Ministry of Finance ~ April 1995)
	(Mr. J.L. Lavuna	
	Mr. T.W. Kibaki	Assistant Director, Head of Planning Section, Ministry of Land Reclamation Regional, and Water Development
	Mrs. Mia Dunford	Chairman, Kenya Association of Travel Agents
	Mr. S. G. Gichere	Senior Economist, Office of the Vice President and Ministry of Planning and National Development
	Mr. P.N. Mbuthi	Research Officer, Ministry of Energy
Mr. K. O. Atieno	Chief Economist, Ministry of Transport and Communications.	
Mr. W.O. Otieno	Director of Research, Kenya Utalii College	
Mr. B. O. K'Omudho	Assistant Director, Ministry of Environment and Nat. Resources	
Mr. P. O. Sika	Chief Superintending Architect, Ministry of Public Works and Housing	

4.1.2. Members of JICA Advisory Committee

	Name	Position
Chairman	Mr. Masayasu Kokubo	Deputy Director, Planning Division, Tourism Department, Transport Policy Bureau, Ministry of Transport
Member	Mr. Masanori Handa	Chief of Investigation Section, Planning Division, Transport Policy Bureau, Ministry of Transport
	Mr. Hitoshi Kamimura	Manager, Planning and Research Department, Japan National Tourist Organisation
JICA	Mr. Naofumi Yamamura (Mr. Motoyuki Uegaki	First Development Study Division, Social Development Study Department, JICA ~ Sept. 1994)

4.1.3. Members of the Counterpart Team

	Name	Position
Leader	Mr. O. Kenani (Mr. Z.E. Gichohi	Deputy Chief Economist, Ministry of Tourism and Wildlife (MOTW) ~ Oct. 1994)
Secretariat Member	Mr. E.L. Namwalo	Economist, MOTW
	Mr. F.K. Kaigua	Economist, MOTW
Member	Mr. C.N. Nyamongo	Assistant Director, MOTW
	Mr. Ng'ang'a Munyu	Senior Economist, Ministry of Energy
	A.T.M. Mbai	Ecologist, Ministry of Environment and Natural Resources
	Mr. E. N. Nyaga	Senior Environmental Officer, Pollution Control, Ministry of Land Reclamation and Regional and Water Development
	Mr. J.A. Amaya	Senior Economist/Regional Planner, Ministry of Local Government

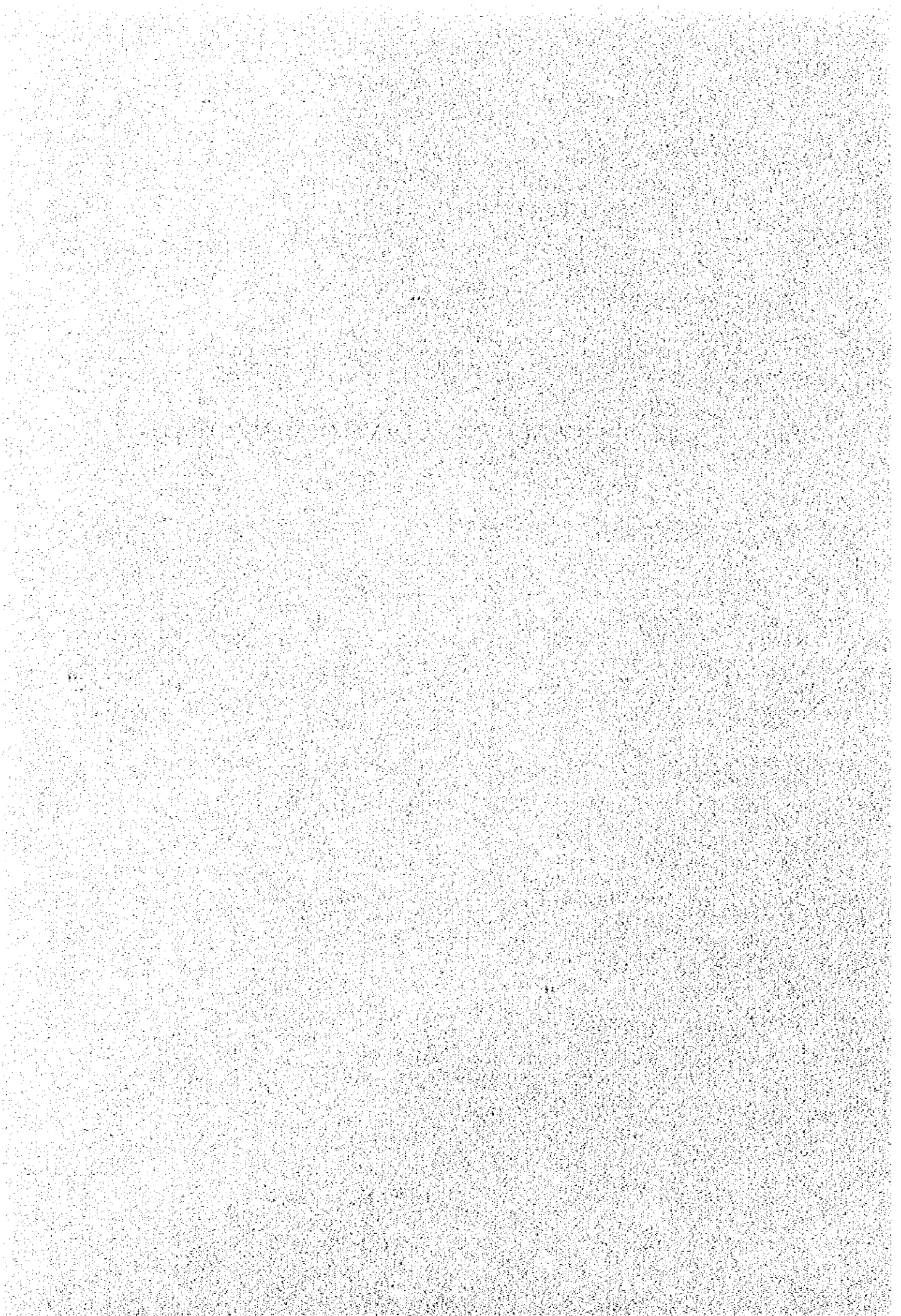
4.1.4. Members of the Study Team

	Name	Assignment
Team Leader Member	Mr. Tadashi Kume	Team Leader/ Tourism Development Planner
	Mr. Kanao Ito	Tourism Resources Evaluation Specialist
	Mr. Kenizo Yamasaki	Tourism Administration/ Institution/ Organisation Specialist
	Mr. Natsuhiko Matsushita	Tourism Promotion Planner
	Mr. Hayata Kusaka	Natural Conservation/ Ecology Specialist
	Mr. Osamu Isoda	Environmental Planner
	Mr. Atsushi Saito	Regional/ Land Use Planner
	Mr. Jun Tanimizu	Tourism Facilities Planner
	Mr. Tsutomu Kudo	Transport Planner
	Mr. Hideyuki Wakasa (Mr. Kazuo Ohno Mr. Akio Kobayashi)	Sanitary Planner ~ March 1995) Energy/ Communication Planner
	Mr. Yoshiki Hirabayashi	Tourism Marketing/ Tourism Demand/ Tourism Promotion Specialist
	Mr. Klaus-Dieter Schneider	Industrial Planner
	Mr. Kimihiko Yanagisawa	Economist
	Mr. Hideki Ishii	Environmental Information Specialist
	Mr. Hisashi Matsuda	Administrative Co-ordinator

4.2. Implementation of the Study

The study was conducted in Japan and Kenya from March, 1994 to September 1995. Several reports were submitted to report on the progress of the study. They were the Inception Report (March, 1994), Progress Report (June, 1994), Interim Report(I) (October, 1994), Interim Report (II) (March, 1995) and the Draft Final Report (July, 1995). The overall diagram of the study's implementation schedule is shown in Figure 1. 2.

CHAPTER 2 DEVELOPMENT STRATEGY



Chapter 2 Development Strategy

1. Review and Appraisal of the Existing Conditions

1.1. Weaknesses of and Constraints for Kenyan Tourism

Based on the analysis of the existing conditions, the study team identified weaknesses of Kenyan tourism as follows.

(1) Over-Dependence on European Market

More than 80 % of the international visitors to Kenya from outside the Africa region are from Europe, which means that Kenyan tourism fluctuates with the economic conditions in Europe. It is essential for Kenyan tourism to develop other market segments including domestic tourism to diversify risks and in order to stabilise her tourism sector. The growth center of the world tourism market both outbound and inbound is shifting to the Pacific Rim, but this does not benefit Kenyan tourism at present.

(2) Long Distance from Major Source Markets

Kenya is a long-haul destination even from Europe. Like other long-haul destinations, Kenyan tourism is susceptible to economic conditions in source markets. Besides, poor flight connections from North America and the Pacific Rim constrain the development of these markets.

(3) Rising Security Problems

Kenya's security condition has been undermined recently by some few and isolated incidents. Kenya's image as one of the safest destinations in Africa has been damaged by hostile and out of proportion news in local and foreign media, which reported these incidents involving tourists.

(4) Poor Linkage with Tourism and Local Economy and Insufficient Participation of Local Community in Tourism

The tourism sector in Kenya has a very limited linkage with local communities, i.e. the level of local community participation in tourism as income and employment generating activities is very low.

(5) Environmental Deterioration and Poor Control over Tourism Development

A well-kept natural environment is the key tourist attraction in Kenya. It is, however, threatened by rapid urbanisation and industrialisation, and excessive inflow of tourists to certain national parks/reserves. Kenya has inadequate infrastructure for conserving its environment. Environmental management is not satisfactory at present.

(6) Inadequate and Insufficiently Maintained Tourist Infrastructure

Tourist infrastructure in Kenya is still insufficient and needs improvement. This is partly responsible for the tourists' concentration in certain national parks and reserves. Insufficient environmental infrastructure is contributing to environmental degradation that shortens the life cycle of tourist destinations. Insufficient water supply limits further tourism development in the coastal area.

(7) Inadequate Skilled Labour Force and Tourism Education System

Kenyan tourism has difficulties in employing skilled labour force in spite of the high unemployment ratio. The MOTW established Utalii College, but its capacity and performance still does not meet the changing demand and increasing sophistication of the tourism sector.

(8) Insufficient Marketing Activities for Developing New Markets

The private sector plays a significant role in promoting Kenya's tourism in collaboration with MOTW, which, however, has little and insufficient budget resources for tourism promotion activities. Initiatives by the private sector, which tend to be based on short term projects, combined with a low budget allocation, resulted in the past in insufficient promotion activities for developing new markets.

1.2. Strengths of and Prospects for Kenyan Tourism

In spite of these weaknesses, tourism has the following prospects for growth:

(1) Increasing Awareness of Environment and Wildlife in the Source Market

Environmental issues have become the global concern and the idea of eco-tourism is based on this global trend. It helps Kenya's tourism to develop as she is renowned for excellent natural attractions and wildlife.

(2) Price Competitiveness in Major Long-Haul Destinations from Europe

A price study conducted by the Economist Intelligence Unit in 1993 shows that Kenya has price competitiveness over most of the long-haul destinations from Europe. Compared to beach-only destinations, Kenya's strength is that she has a variety of unique tourist resources including wildlife.

(3) Established Image as a Safari and Beach Destination

Safari, a Swahili word in origin, is almost synonymous with Kenya, which shows the established image of Kenya as a safari destination. The Mombasa area is renowned as a beach destination though its popularity is limited to the European source market. Kenya has diverse but underutilized tourist products, but has a distinct image as a beach and safari destination. It would be easier to develop additional images to the existing ones than creating a completely new image.

(4) Relative Political Stability Compared to Safari Competitors

In spite of the recent security problems, Kenya is one of the safest countries in Africa. This is an advantage in competing with other safari destinations including South Africa.

(5) Relative Proximity to the Markets

Kenya has good transportation links with Europe, the Near and Middle East and South Asia and is the closest to the source markets of all the safari destinations in Africa.

(6) Relatively Developed Tourist Infrastructure, Facilities and Services

Compared to other safari competitors except for South Africa, Kenya has relatively developed infrastructure, facilities and services.

(7) Indistinct Seasonality

Kenya is blessed with sunshine all year round. There are two rainy seasons, but they are relatively mild and short compared with, for example, Southeast Asia, where the room occupancy rate is destined to be low, as six months of the year is off season.

(8) Diversity of Tourism Resources

Kenya has diverse but undeveloped tourist products and tourism resources. Kenya does not only provide wildlife but also exotic Swahili towns, archaeological ruins as well as unique and colourful ethnic cultures.

(9) Lower Language Barrier

Most of the Kenyans speak English and Kiswahili (a regional Language in Eastern and Central Africa) and this is a great advantage in developing international tourism. For travellers, it makes Kenya a relatively easy country to travel in. For the tourism sector in Kenya, it means competitiveness in the international market as it is relatively easy to hire English-speaking employees compared with other African countries. It also implies a lower barrier for local people to participate in tourism related businesses.

1.3. Assessment of Market Opportunities and Competitor Analysis

(1) Beach Resort Tourism

Beach resort tourism will continue to constitute the major part of Kenyan tourism in the future. It has a price competitiveness over major long-haul destinations from Europe such as the Caribbean, the Seychelles, India and Thailand. Tanzania is emerging as a competitor beach destination with similar attractions of wildlife safari and Swahili cultural heritage.

Beach resort tourism, however, attracts tourists from within relatively short distance since the price factor plays an important role. Kenya's price competitiveness is effective only within Europe and thus beach resort tourism would be primarily for the European market. This, however, does not necessarily mean that Kenya should continue to depend on her traditional markets like the UK and Germany. Instead, Kenya should diversify its markets within Europe. Spain is emerging as a new market, and many European countries show lower share of tourists to Kenya in the markets than the UK and Germany. In a long-term perspective, economic reforms in Eastern Europe might also generate tourists to Kenya.

Tourists from North America, Australia/New Zealand and East Asia are attracted by wildlife or cultural resources, but Kenya should try to make them stay at the coast for a few days after they finish their safari or sight-seeing. Cultural attractions based on Swahili heritage could help to differentiate the Kenyan coast from the Seychelles, Mauritius and the Maldives where natural attractions are dominant.

(2) Wildlife and Eco-tourism

There are many competitors in this market in Africa, namely, Tanzania, Uganda, Zambia, Botswana, Zimbabwe and South Africa. Except for South Africa, these countries have poor tourist infrastructure, facilities and services though they might be richer in wildlife resources than Kenya. South Africa has a developed infrastructure as well as good tourism related facilities and services, but has less price competitiveness than Kenya because of its location. Poor security conditions have been another drawback of South Africa.

Wildlife tourism is the core of Kenya's image. Unlike beach resort tourism, it can attract visitors from all over the world. Promotion activities towards non-European markets should be centred on this type of tourism.

(3) Mountain and Highland Resort Tourism

Europe would be the primary target of this market, but the cool climate in the Kenyan highland combined with wildlife and shopping attractions in Nairobi could attract tourists from India and South East Asia in a long-run. This assumes that economic growth in these countries will generate international tourists to Kenya in the future. Traditionally, Indian people escape from the cities during the hottest months (April and May) to stay at Himalayan mountain resorts. This tradition could be utilised to promote mountain resort tourism to Kenya. Introduction of resort tourism to the Kenyan inland will also serve to extend the length of stay in the area that is currently patronised by itinerant tourists.

(4) Cultural Tourism

Kenya's image as a cultural destination is very poor but the coastal area, Lamu and towns in the neighbouring islands in particular, abound in rich cultural tourism resources. Historical towns in North Africa and the Middle East, however, have similar, though not the same, attractions as Lamu and many of them are by far larger in scale than the Kenyan counterparts. The advantages of Kenya are that these tourism resources are combined, or could be combined with wildlife and beach resort tourism, and that local communities have a more hospitable attitude towards tourism than those in North Africa and the Middle East. Difference of Swahili culture from Arabic culture should be stressed in order to differentiate Kenya from the competitors.

In this context, Tanzania is the most formidable rival of Kenya as it has a combination of superb beaches and cultural attractions based on Swahili cultural heritage, as well as wildlife safaris in the inland.

Kenya's competitiveness over Tanzania would depend on the performance of its tourism sector.

Since cultural tourism can attract tourists from further areas than beach resort tourism, promotion of this tourism would diversify Kenya's market.

(5) Rail Safari and Cruise

This is an untapped market segment worth efforts for development. It could serve to diversify tourism types and to strengthen competitiveness in the market. Kenya's weakness is that it currently does not have an image as a destination for cruise and luxurious train journey, and therefore needs investments to promote this image as well as to develop the facilities. Another weakness is the poor maintenance of the rail, and the rougher Indian Ocean than the primary competitor destination, namely the Caribbean.

(6) Private Ranch Tourism

Several private ranches, in particular in the Central Tourism Region cater for tourists who would like to experience Kenyan country life. It is generally combined with game viewing in ranches and therefore, is successful in providing a Kenyan experience. The ranch tourism could provide an exclusive alternative for tourists, who would like to enjoy nature and wildlife, and therefore is worth attention in terms of attracting the upper market segment. Promoting this type of tourism would also serve to relieve the congestion in parks and reserves.

There have been examples of ranches that provide tourists the experience of country life in developed countries. Kenya's strength lies in the combination of country life and African wildlife. South Africa has already developed this tourism and could be Kenya's principal competitor in this context. Kenya, however, has a strength over South Africa in price competitiveness from major tourist generating countries.

As regards wildlife, it has a potential to attract tourists even from East Asia.

(7) Village Tourism

There have been attempts in many parts of the world to develop alternative ways of tourism in contrast to mass tourism. Village tourism, or ethnographic tourism is an alternative tourism that has a potential in Kenya. At present, it is almost non-existent, but development of this tourism could contribute greatly to rural development if successfully arranged. Development of this kind of tourism, however, largely

depends on the policies of respective local communities and the improvement of security conditions in certain areas. Since this is based on unique tourism resources, market competition is not very severe.

(8) Special Interest Tourism

As people experience overseas travel, a certain percentage of them come to require more advanced forms of travel. This is the background that special interested tourism or SIT is gaining popularity. Growing awareness of environmental issues and eco-tourism also helps this market to develop in Kenya. Competition among destinations is moderate since it is based on unique resources, but the market volume is not very large. The following opportunities for SIT are identified in Kenya:

- Archaeology
- Ethnology
- Ornithology
- Botany and Zoology.

It is recommendable to combine these special elements with general interest safari tours.

(9) Activity Holidays

These types of tourism are additions to a basic itinerary rather than independent markets. The following activities are identified to be promising in Kenya:

- Golf
- Mountain climbing/trekking
- Rafting
- Game fishing
- Scuba diving.

(10) Convention and Conference Tourism

Kenya's advantage in this market is that Nairobi has hosted international conferences in the past. Although competition with cities in developed countries is strong, there are only few competitors in Sub-Saharan Africa except for South Africa, which suggests Kenya's competitiveness in this market. Although conference related services and facilities in Kenya fall behind those in developed countries, Kenya's strength lies in conferences on themes specific to Africa.

This is a profitable market segment which Kenya should develop. However, Nairobi lacks sufficient hotel supply and the Kenyatta International Conference Centre needs improvement of its facilities. It is also noted that conventions and conferences, if properly conducted, promote Kenya's name and image as a holiday destination and contribute greatly to develop other potential markets.

2. Development Strategies

2.1. Development Goals

The development strategies are based on the goals of the Tourism Development Master Plan. They are explained below as follows.

(1) Sustainable Use of Tourism Resources

This goal aims at promoting the sustainable use of tourism resources as there is a need for the tourism sector in Kenya to survive for future generations. Tourism resources include not only wildlife and the environment, but also traditional townscapes and the country's cultural heritage.

(2) Contribution to the National Economy and Rural Development

This goal aims at stressing the importance of the tourism sector for Kenya's economic development. The tourism sector is expected to create jobs, earn foreign exchange as an "export oriented industry" and encourage rural development.

(3) Maximisation of Tourist Satisfaction

This aims at improving the performance of the tourism sector in order to improve its competitiveness in the international market. This also makes a premise to achieve the second goal.

2.2. Development Strategy

Based on an analysis of existing conditions and development opportunities that have been discussed, the study team has identified four core elements for the future tourism strategy. They are:

- Diversification of tourism
- Distribution of tourism benefits
- Upgrading of travel conditions, and
- Conservation of natural and cultural heritage.

The following section discusses the strategy in detail.

2.2.1. Diversification of Tourism

(1) Diversification of Tourism Types

Wildlife tourism serves currently to differentiate Kenya from competitor beach destinations, but more attractions should be sought to secure Kenya's advantageous position in the market. Strengthening of cultural and historical aspects of Kenya would be important in order to develop longer-haul markets like the Far East as well as upper-market segments.

The analysis of the tourism resources suggests good potential for diversification.

(2) Diversification within Wildlife Tourism

Safari tours are not necessarily the only means to enjoy Kenya's wildlife. Kenyan tourism should seek alternative methods for wildlife tourism that could meet market needs and that require more variety of attractions, closer contacts with nature, and more preferably, are less demanding on the social and natural environment.

(3) Diversification of Source Markets

Kenya should seek to develop new source markets to diversify tourism opportunities as well as to distribute business risks that are directly linked with the European economy. Prospective new markets are the Pacific Rim, the travel market of which is the fastest growing travel market in the world, South Asia that has strong ties with Kenya, North America and the domestic market.

2.2.2. Distribution of Tourism Benefits

(1) Spatial Distribution

Kenya should distribute tourists geographically in order to protect the environment of over-crowded parks and reserves from deterioration, to give tourists more satisfaction, and to spread tourism benefits to remoter areas. This includes distribution of tourists within a destination by promoting more effective use of tourism resources.

(2) Social Distribution

Kenya should distribute tourism benefits socially so that a wider range of people could enjoy the fruits of tourism by promoting local communities' participation in tourism. It is also necessary to formulate a national-level consensus to develop tourism in Kenya.

2.2.3. Improvement of Travel Conditions

(1) Soothing of Congestion in Parks and Reserves

Measures against congestion in parks and reserves are necessary not only in terms of environmental conservation but also in terms of tourist satisfaction. In addition to the promotion of spatial distribution of tourist traffic as already discussed, efficient use of the existing wildlife areas by increasing road density and by introducing a reservation system for the few congested parks/reserves deserve considerations.

(2) Improvement of Urban & Rural Amenities

Although luxurious resorts and hotels are abundant in Kenya, cities and villages lack amenities for tourists as well as for local people. Development of "tourist areas" give tourists a chance to mingle with local people and, for local people, work as a device to give the benefits of tourism to the local community. This would also serve to diversify Kenyan tourism. However, this would require improving rural amenities and social infrastructure (water supply and sanitation, energy, heat, facilities, roads) amenities.

(3) Upgrading of Tourist Services

Better tourism related services are at present a comparative advantage of Kenyan tourism over other African competitors. However, they need further improvement when compared with major international destinations, such as Southeast Asia, the Caribbean, Europe and the USA.

2.2.4. Conservation of Natural and Cultural Heritage

(1) Nature and Wildlife

Nature and wildlife are the life-support pillars for Kenyan tourism. Kenya should protect and improve them through better management of tourism development.

(2) Traditional Cultures

Traditional cultures would serve greatly to diversify tourism type and source markets, if they were displayed to tourists in a more sophisticated manner. Tourism, if guided properly, could contribute to conserve the cultures by giving financial incentives and by encouraging people's awareness of their traditions.

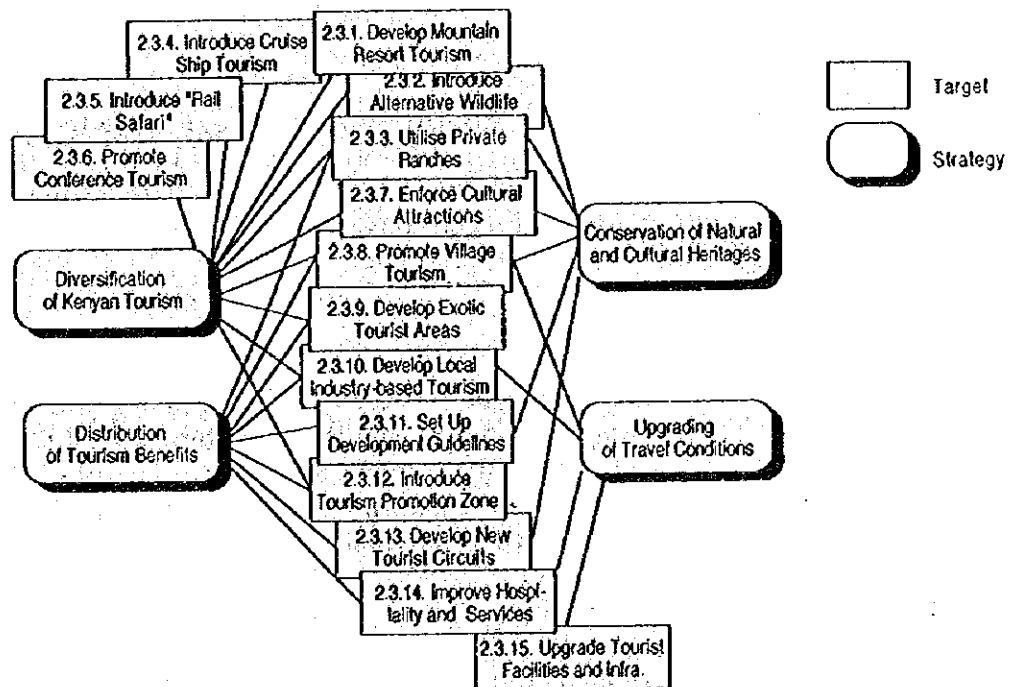
(3) Landscape and Townscape

Unique landscapes and townscapes are attractions for tourists. Taking into account the current situation, in which tourists tend to be enclosed in "enclaves", this would serve to induce them out to the Kenyan countryside and towns, and to extend tourism benefits to a wider range of people. The conservation of towns with Swahili architecture deserves special consideration in this context.

2.3. Development Targets

The development strategy defines fifteen development targets. The links between the strategy and the targets are shown in Figure 2. 1.

Figure 2. 1 Links between the Strategy and the Targets



Source: JICA Study Team

2.3.1. Develop Mountain Resort Tourism

The cool climate in the Central Highland is suitable for developing mountain resort tourism. Private ranches as discussed later could be combined with this type of tourism.

2.3.2. Introduce Alternative Wildlife and Nature Tourism

The safari tour is at present the principal method to enjoy Kenya's wildlife, but efforts should be made to promote alternatives that have less impact on the natural environment and/or diversify Kenyan tourism. Considerations for introducing the alternatives are to arrange closer contacts with nature, and to find new objectives for tourism such as walking safaris and mangrove cruises.

2.3.3. Utilise Private Ranches

Utilisation of private ranches provides alternative opportunities for tourists, who wish to experience Kenyan country life. It also provides an exclusive option for those, who would like to enjoy wildlife tourism. It would also play an important role of diversifying Kenyan tourism towards the upper-market direction.

2.3.4. Introduce Cruise Ship Tourism

The cruise market is a growing market segment which Kenya has the potential to develop. The potential base and gateway for Indian Ocean cruises would be Mombasa. Redevelopment of Mombasa's old port area with emphasis on the conservation of the traditional townscape is worth considering in this context.

2.3.5. Introduce "Rail Safaris"

Kenya Railways runs across Tsavo National Park and the Rift Valley, which provides a good opportunity to introduce "rail safaris", in order to diversify tourist attractions. Rail safaris would also distribute tourism demand to the Eastern, Central and Western Tourism Regions and relieve the congestion in Maasai Mara.

2.3.6. Promote Conference Tourism

Kenya is one of the few countries in Africa capable of hosting international conferences. Conference tourism is a profitable market segment and it also has the effect to publicise Kenya's image as a tourist destination. Kenya should tap this market in order to diversify tourism types and to improve per-tourist income.

Domestic conferences are also an important and expanding market segment, taking into account the relative importance of the corporate market in Kenya like in other developing countries.

2.3.7. Enforce Cultural Attractions

Kenya's cultural destination image needs to be strengthened in order to diversify tourist attractions and source markets. This would be a key to attract longer-haul tourists that tend to be more culturally motivated than European beach tourists. The conservation of townscapes in a few coastal towns with traditional Swahili architecture would be important and this target links with the target 2.3.9, namely the development of exotic tourist areas.

2.3.8. Promote Village Tourism

Village tourism is to visit a village in order to appreciate authentic Kenyan rural life. This would appeal to tourists, who are not satisfied with the average sight-seeing tours and wish for a real African experience. Another role of introducing this tourism is to promote rural development, which makes tourism a catalyst.

2.3.9. Develop Exotic Tourist Areas

"Tourist area" is defined as an area where tourists are encouraged to roam about freely in a host community. It aims at giving tourists an exotic experience, local communities the chance to participate in tourism and Kenyan tourism the benefit to diversify her tourist attractions.

Historical towns along the coast and the old port area of Mombasa need tourism development in this context.

2.3.10. Develop Local Industry-based Tourism

It is obvious for Kenyan tourism to develop local industry-based tourism to maximise tourist income as well as to promote diversification of tourist attractions. Besides selling local products, the factories and workshops themselves could be tourist attractions and increase the attractiveness of tourism. It would be a good strategy to combine local industry-based tourism with the above mentioned village tourism.

2.3.11. Set Up Development Guidelines

Development guidelines aim at conserving the natural and cultural heritage of Kenya for the sustainable use of tourism resources as specified by a development goal. They also meet the market needs that put importance on the harmonious development with nature.

2.3.12. Introduce the TPZ System

Both, conservation and economic goals require the introduction of the Tourism Promotion Zone System. A tourism promotion zone is defined as an area equipped with infrastructure, where establishment of tourist facilities are encouraged to suppress haphazard/uncoordinated development. The system promotes the establishment of commercial facilities operated by local entrepreneurs, in order to spread economic benefits and cater for tourist needs like food, shopping, entertainment and travel information.

2.3.13. Develop New Tourist Circuits

Tourism in Kenya concentrates currently in areas along the Mombasa-Maasai Mara route. This target aims at reducing the over-crowdedness in some parks/reserves for environmental protection, distributing tourism benefits geographically and diversifying tourist attractions. This includes developing international circuits involving Tanzania and Uganda.

2.3.14. Improve Hospitality and Tourist Services

Since Kenya's competitiveness over emerging African rivals would largely depend on the better performance of her tourism sector, improvement of hospitality and tourist services is indispensable. This requires a good training system for manpower development, a campaign to provoke awareness of the importance of services, and public relations to publicise tourism benefits for the Kenyan economy.

2.3.15. Upgrade Tourist Facilities and Infrastructure

Upgrading of tourist facilities, including roadside amenities, camping facilities and tourist information are indispensable for improvement travel conditions. This assumes the development of supporting infrastructure that facilitates development and prevents adverse impacts of tourism.

3. Development Framework

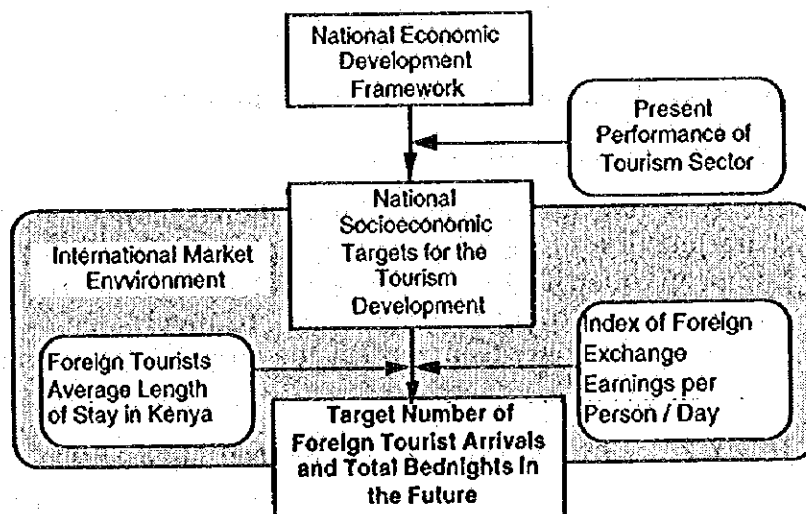
3.1. National Tourism Demand Target

3.1.1. Target Setting

The approach of target setting for foreign tourist arrivals is shown in the flow chart in Figure 2. 2. The national socio-economic target by the tourism sector is set as mentioned in the above section. To achieve this target, the numbers of foreign tourist arrivals are calculated.

Thus, the target in designated years is the number of foreign tourists, who should be encouraged to visit Kenya.

Figure 2. 2 Flow Chart of Foreign Tourist Arrival Target Setting



Source: JICA Study Team

Table 2.1 Target Foreign Exchange Earnings by the Tourism Sector

Year	Unit: million K€			
	1993	2000	2005	2010
Total GDP	4,337.6	6,202.2	8,252.9	10,766.2
(Growth Rate)		5.2%	5.9%	5.5%
Service Sector GDP	1,652.5	2,494.8	3,479.2	4,739.8
(Growth Rate)		6.1%	6.9%	6.4%
% share to GDP	38.1%	40.2%	42.1%	44.0%
Foreign Exchange Earnings by Tourism Sector	271	443	714	1040
(Growth Rate)		7.0%	9.7%	7.5%

Note: Foreign exchange earnings in 1993 K€ 1083.5 million [NET]
 Constant price in 1982 is estimated by using Trade Restaurant and hotel price deflator
 Estimated foreign exchange earnings in 1982 constant price is K€ 270.5 million
 Number of tourists arrivals in 1993 777.4 thousand
 Average length of stay in 1993 is estimated to be 13.9 days, i.e. 12.0 bed-nights
 Source: Sessional Paper on Recovery and Sustainable Development, Ministry of Planning and National Development, JICA Study Team

3.1.2. Target Number of Foreign Tourist Arrivals and Bed-nights

(1) Average Length of Stay

The average length of stay of international tourists is affected by the characteristics of holiday taking in tourist generating countries. European countries, from where a greater part of tourists originate, are recognised as countries that take relatively long holidays and vacations. The study team has set the target average length of stay as shown in Table 2. 2.

Table 2.2 Average Length of Stay By Tourist Origin Regions

Origin Region	Unit: Days		
	Present	Year 2000	Year 2010
Europe	19.2	19.0	19.0
America	15.4	15.4	15.5
Africa	4.1	5.0	7.5
Asia	8.6	9.0	11.5
Oceanic	11.7	12.0	12.0

Source: JICA Study Team

(2) Foreign Exchange Earnings per Person per Day

Foreign exchange earnings per foreign tourist per day are used as an index for planning purposes. Based on data in the "Economic Survey 1994", in 1993, Kenyan £ 25 per day per person were calculated on a 1982 constant price basis. In accordance with the past performance of the tourism sector, the foreign exchange earnings per foreign tourist per day in constant prices has been stable.

Although the Kenyan Government would like to maximize tourist expenditures, it would be difficult to achieve the up-market shift immediately as it depends on the improvement of the service level that would satisfy the needs of the up market. The competition among similar destinations such as the Caribbean and South African countries is another factor to consider to make the shift.

In this Master Plan, the targeted foreign exchange earnings per foreign tourist per day up to the year 2010 are assumed to grow at 1.4% to 1.8% annually.

(3) Target Number of Foreign Tourist Arrivals and Bed-nights

Based on the assumptions described above, the target numbers of foreign tourist arrivals are calculated as shown in Table 2. 3. Target tourist arrivals in the year 2000 and 2010 are 1.1 million and 2.1 million tourists, respectively.

The number of bed-nights is a key planning parameter for facility planning. It is also shown in the same table.

Table 2. 3 Target Number of Foreign Tourists Arrivals and Bed-nights

Year	Unit: As specified			
	1993	2000	2005	2010
Foreign Tourist Arrival (million)	0.78	1.1	1.6	2.1
Average Length of Stay (days)	13.9	13.9	14.1	14.4
Calculated Bed-night (million bed-nights)	10.0	14.2	21.0	28.0

Note: Calculated Bed-nights in 1993 are different from Hotel Bed-nights shown in "Economic Survey 1994" Ministry of Planning and National Development, because the survey does not cover all facilities.

Source: JICA Study Team

The hotel bed-nights by domestic tourists are identified in the "Economic Survey 1994". In this Master Plan, the bed-nights generated by domestic tourists are estimated based on recorded "hotel bed-nights". It is assumed that the number of bed-nights will increase at the same growth rate as that of total GDP.

Table 2. 4 shows the target bed-nights generated by the domestic tourists in the designated years.

Table 2. 4 Target Number of Bed-nights (Domestic)

	Unit: Million bed-nights			
	1993	2000	2005	2010
Target Bed-nights (Domestic)	0.9	1.3	1.8	2.6

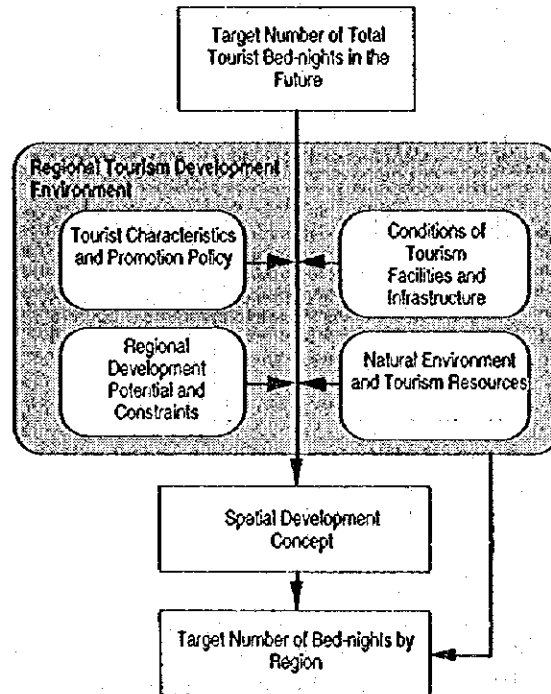
Note: VFR, Tents and "Hotel" users are not included.
Source: JICA Study Team

3.2. Regional Development Framework

3.2.1. Conditions of Regional Tourism Development

The target number of tourist bed-nights are estimated for the tourism development framework of each tourism region. Tourist bed-nights in each tourism region are used as a base figure for facilities' and infrastructure planning. Figure 2. 3 shows the work flow of the estimation and the relationship of the parameter.

Figure 2. 3 Flowchart of Target Number of Bed-nights by Region Setting



Source: JICA Study Team

The following conditions are the base for estimating the target numbers of bed-nights by region.

3.2.2. Spatial Development Framework

(1) Development Scenario and Development Pattern

Figure 2. 4 shows the development scenario and development pattern in Kenya. Considering the time scale, tourism development can be divided conceptually into three stages in general. They are :

- The pioneer stage
- The growing stage, and
- The mature stage.

These stages of growth can be applied to all scales of development from spot level tourism development to national level tourism development.

In the case of Kenya, tourists are traditionally attracted by the wildness of Kenya's nature. Tourism activities were mainly attracted by adventure type tourism. Unspoiled beautiful beaches and coral reefs also attracted some European tourists. The tourism sector grew steadily in the past because of rich natural tourism resources and comparatively good access from Europe. A stable socio-political environment contributed to the creation of a favourable tourism image.

Kenya is considered to have entered the growing stage. The tourism sector will grow more rapidly, if appropriate measures are taken to overcome the constraints. The formation of a tourism corridor based on the cluster type of development by aerial or regional integration is proposed to meet the tourist demand.

In the "mature stage", tourists will be able to enjoy a variety of attractions and activities under a good management of tourism resources, environment and high services' quality.

Figure 2.4 Development Scenario and Development Pattern

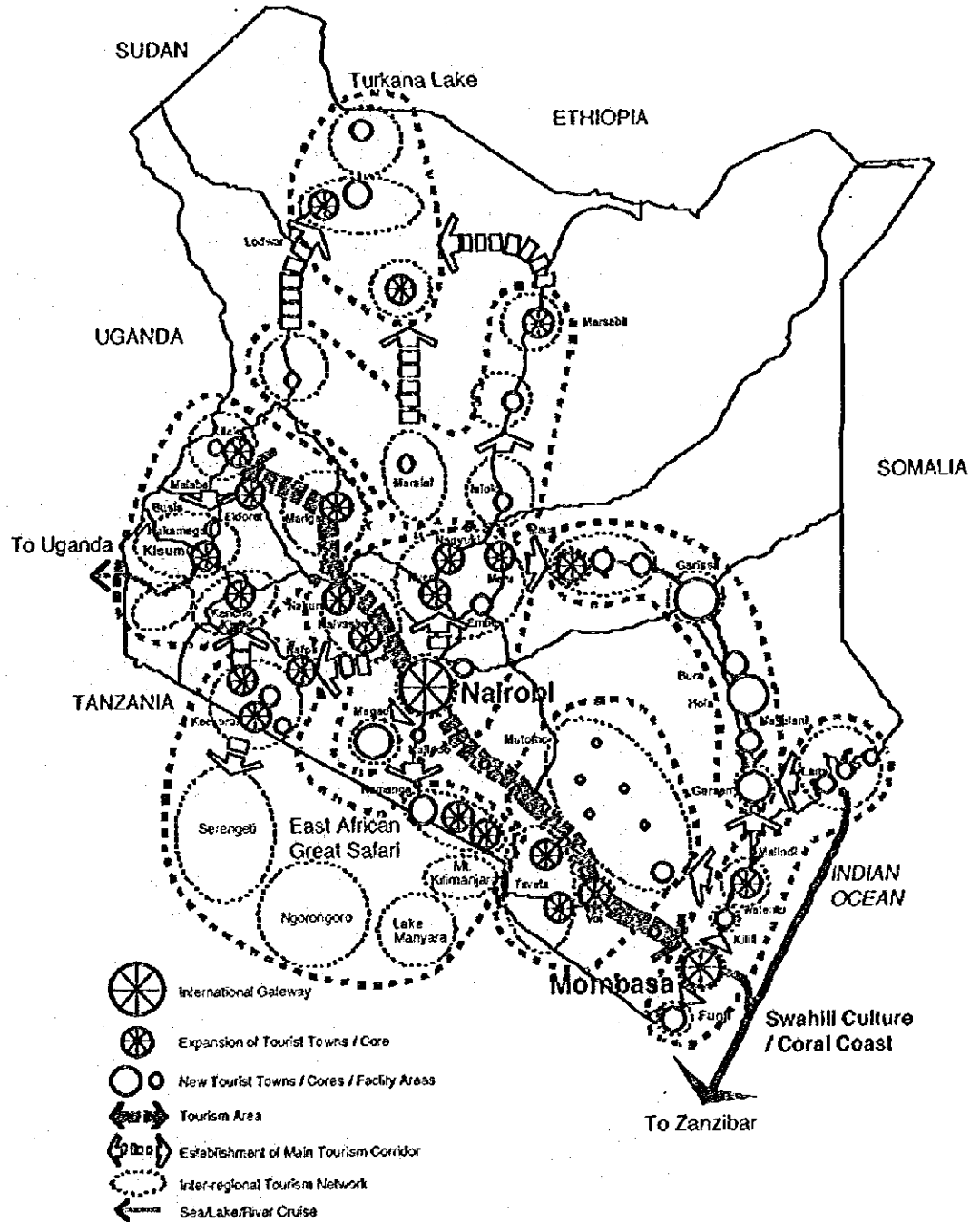
Development Stage	Pioneer Stage	Growing Stage	Matured Stage
Tourists Demand (Number of Tourists Arrivals/ Generation)	Tourism in KENYA at Present 		
Development Pattern Legend: ● Gateway ⊙ Tourism Spot ■ Dev. Corridor ⊕ Tourists Base			
Description	<ul style="list-style-type: none"> - Spots or Small Area Development - Enclaves of Tourism Development 	<ul style="list-style-type: none"> - Cluster Development - Corridor Formation 	<ul style="list-style-type: none"> - Network Formation - Specialization of Tourism Products - Tourist Base & Tour Route Establishment - Variety of Attractions
Market	Traditional Market <ul style="list-style-type: none"> - Europe - America - South Asia - Africa 	<ul style="list-style-type: none"> - Traditional Market Expansion - New Market Exploitation 	<ul style="list-style-type: none"> - Established Traditional Market - New Market Expansion
Response	<ul style="list-style-type: none"> - Witness of The Nature - Adventure Type Tour - Conference and Incentive Travel 	<ul style="list-style-type: none"> - Witness of Nature - Eco-tourism - Conservation of Natural Tourism Resources - Cultural Resource Utilisation & Development 	<ul style="list-style-type: none"> - Conservation & Management of Natural & Cultural Resource

Source: JICA Study Team

(2) Spatial Development Concept

A spatial development concept is established by taking into account the same conditions as for the numerical framework in the preceding section. Figure 2.5 shows the concept.

Figure 2.5 Spatial Development Concept



Source: JICA Study Team

A tourism region is divided into tourism areas. A tourism core is a zone in a tourism area, in which intensive development of infrastructure, tourist service facilities and accommodations is made. At least one tourism core is designated in a tourism area.

The the following criteria are used for choosing tourism cores:

- Suitability for resort type accommodation
- Environmental stability
- Accessibility to major tourism products
- Contribution to up-market shift, and
- Contribution to rural employment.

The percentage share of rooms in a tourism core relative to the total room assignment to a tourism area depends primarily on the types of accommodation. Some accommodation types should be located and dispersed outside of tourism cores in order to maintain a feeling of exclusiveness of some inland resort areas.

3.2.3. Target Number of Bed-nights by Region

The target number of bed-nights by region are summarised in Table 2. 5. It should be noted that these figures include the bed-nights in any kind of accommodation like unauthorised accommodation, villas and relatives' houses. The number in 1993, therefore, is higher than the figures in the "Economic Survey 1994".

Table 2. 5 Target Number of Bed-nights (Foreign and Domestic)

Tourism Region	Unit : million bed-nights			
	1993	2000	2005	2010
Nairobi	3.19	4.55	6.55	8.18
Central	0.60	1.04	1.85	2.74
Massailand	0.58	0.77	1.13	1.49
Western	0.46	0.77	1.37	2.07
Turkana	0.08	0.11	0.36	0.76
Northern	0.04	0.05	0.06	0.16
Tana Basin	0.02	0.03	0.31	0.54
Coastal	5.65	7.65	10.29	13.32
Eastern	0.31	0.55	0.97	1.38
Total	10.92	15.52	22.88	30.65

Source : JICA Study Team

3.2.4. Number of Rooms Required by Region

Based on the target number of bed-nights by tourism regions, the number of required hotel rooms has been calculated. The following assumptions are used for the calculation :

- An average of 1.7 persons occupies a room
- The room occupancy rate will increase in the future. The occupancy rates in respective tourism regions varies depending on the characteristics of the tourism demand to the regions. The national average room occupancy rate will increase from 53% at present to 63% in the year 2000 and 66% in the year 2010
- The calculated number of rooms exclude the bed-nights spent at accommodations other than hotels.

Table 2. 6 summarises the result of the estimation.

Table 2. 6 Number of Required Rooms

Tourism Region	Unit: Number			
	1,993	2,000	2,005	2,010
Nairobi	4,600	7,300	10,500	13,150
Central	2,271	3,090	4,890	6,620
Masaiian	1,740	2,495	3,350	4,000
Western	769	2,190	3,600	5,290
Tourkana	48	455	1,145	2,210
Northern	24	140	200	475
Tana Basin	71	121	1,000	1,600
Coastal	13,820	17,080	22,920	29,700
Eastern	584	1,480	2,990	3,420
Total	23,926	34,351	50,595	66,465

Note: Nairobi includes rooms available in the suburban area of Nairobi
Source: JICA Study Team

3.3. Employment Generation by the Tourism Sector

Manpower development to meet the sector's future requirements is a significant issue. Employment generated by the tourism sector is estimated for both, direct and indirect employment. The following assumptions are made for the estimation :

- One hotel bed generates 0.8 person direct employment
- One direct hotel employment generates 1.31 direct employment outside of the hotel
- One direct hotel employment generates 1.74 indirect employment.

The first assumption is based on the interviews with the hoteliers in Kenya conducted by the study team. The second and third are based on a World Bank publication that included a case study of Kenya as shown in Table 2.7.

Table 2.7 Ratio of Employment Generation by the Tourism Sector

Employment	Category	Unit Ratio
		Kenya
Direct	Hotels	1.00
	Other	1.31
	Subtotal	2.31
Indirect	Agriculture	0.56
	Tourist purchases	0.72
	Miscellaneous	0.46
	Subtotal	1.74
Total		4.05

Source: World Bank "TOURISM Passport to Development?", Emanuel de Kadt, 1979.

Based on the above assumptions and the development framework, the number of employment generated by the tourism sector in Kenya will be as shown in Table 2.8.

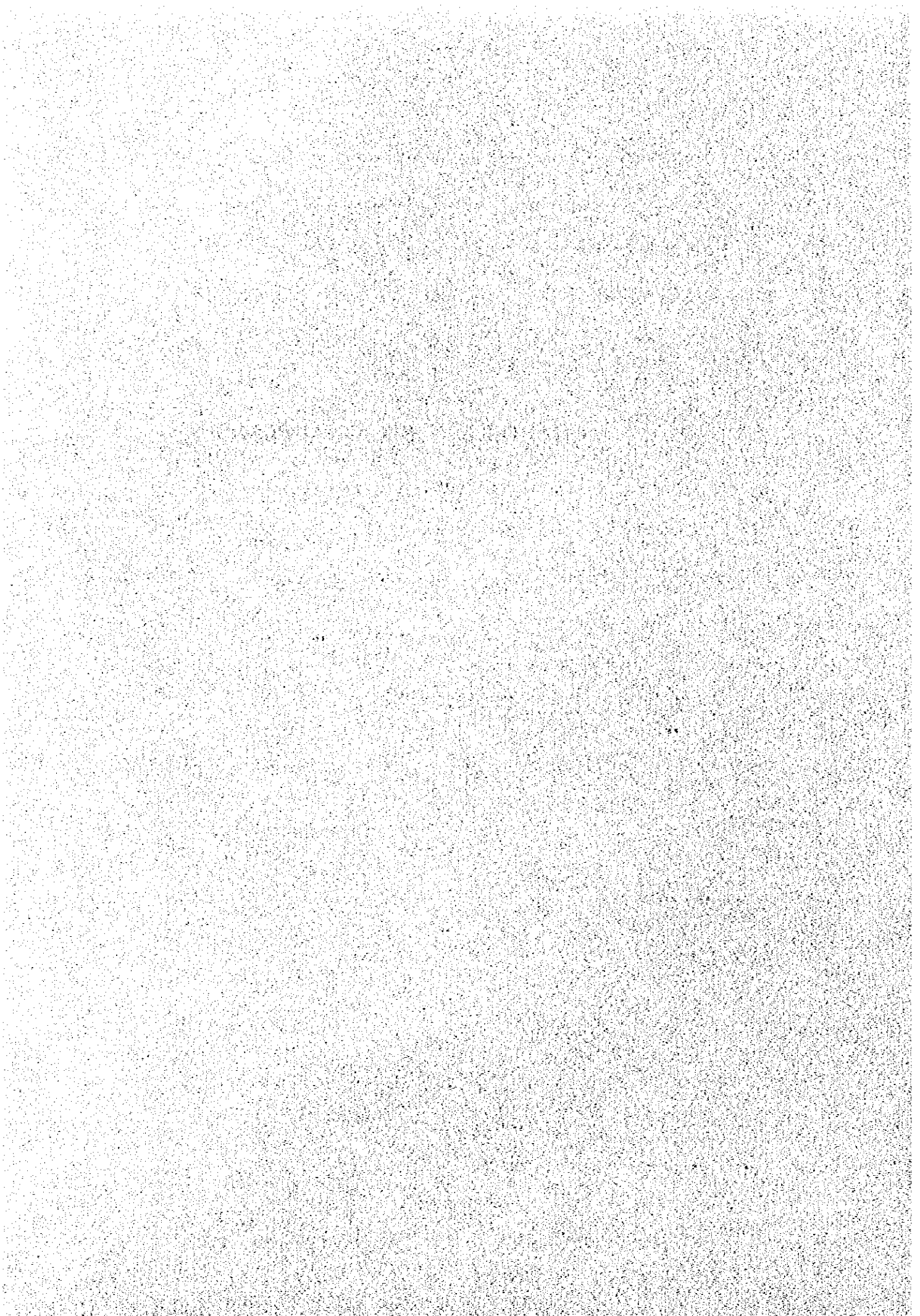
Table 2.8 Employment Generated by the Tourism Sector

	Unit: 000' persons			
	1993	2000	2005	2010
Direct Employment	88	127	187	246
Indirect Employment	67	96	141	185
Total	155	223	328	431

Note : Tents are considered equivalent to hotels.

Source : JICA Study Team.

CHAPTER 3 REGIONAL PLANS



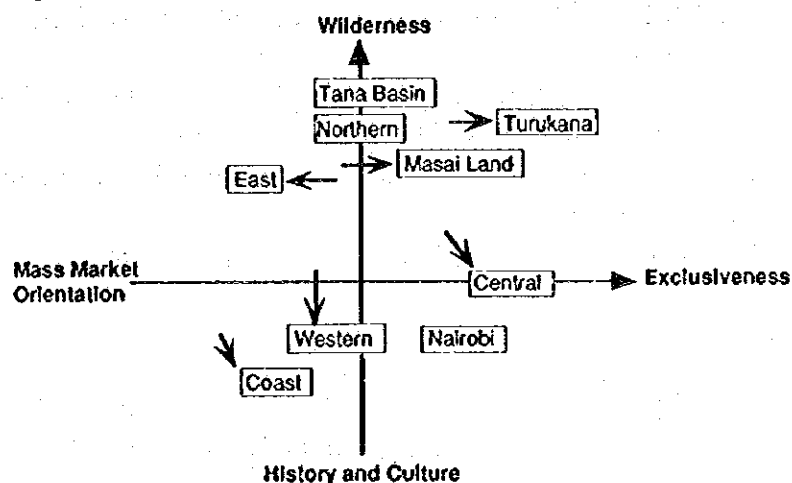
Chapter 3 Regional Plans

1. Overview of the Tourism Regions

This chapter describes the development directions for eight tourism regions. The study team identified an appropriate future positioning of the eight tourism regions as shown in Figure 3. 1. Attached arrows show the development directions for the respective tourism regions.

The general policy for the positioning are to shift several regions towards the "cultural" and/or the "exclusive" directions. The Eastern Tourism Region, however, moves towards the "mass market", in order to relieve congestion in Masai Land by absorbing safari tourists from the coast. Table 3. 1 shows the suitability of the regions for major market segments.

Figure 3. 1 Positioning of Tourism Regions in the Future



Source: JICA Study Team

Table 3. 1 Market-Region Matrix for Tourism

	Nairobi	Central	Maasai Land	Western	Turkana	Northern	Tana Basin	Coast	Eastern
Beach Resort								XXX	
Wildlife		XX	XXX	XX	XX	X	X		XX
Mountain Resort	X	XXX		XX		X			
Cultural	XX	X	X	XX	X	X	X	XXX	X
Convention	XXX	X						XX	
Cruise Holidays				X	X			XXX	
Ranch Tourism		XXX	XX	X			X		X
Village Tourism		XX	X	XX	X	X	X	X	X
SIT				XX	XX	XX	XX		
Activity	XX	XXX	X				XX	XXX	XX

Note: X - some potential, XX - moderate potential, XXX - good potential

Source: JICA Study Team

2. The Central Tourism Region

2.1. Regional Concept

- Less congested and more exclusive wildlife tourism
- Remains of "white highland"
- Private ranches
- Mountain and forest resort
- The hub for East African Safaris (for Nairobi)

2.2. Target Market

- General and advanced safari tourists
- Up-market general interest tourists (for private ranches)
- Tourists from new markets (South Asia, America and Pacific)
- Weekend trips from Nairobi

2.3. Development Scenario and Strategy

- Establish Nairobi as the East African gateway
- Establish the Mt. Kenya resort for wildlife trekking and promote appeal of forest image
- Aim at an substitute destination for Masai Mara making use of its landscape similarity (Samburu and Laikipia)
- Utilise private ranches for an experience of Kenyan country life and alternative wildlife tourism
- Enhance Rift Valley Lakes Resorts by promoting spa utilisation for tourism

2.4. Infrastructure Development

- Beautify Nairobi Airport to give a sense of arrival to the visitors
- Up-grade road network to combine Mt. Kenya and Rift Valley lakes
- Improve access roads for private ranches
- Improve and utilise existing rails to introduce Rail Safaris

2.5. Environmental Considerations

- Conserve water quality on Lake Nakuru/Naivasha/Elementaita
- Establish a better safari system: training and licensing for safari drivers and introduction of alternative transportation
- Conserve montane forest on Mt. Kenya and Aberdare National Parks
- Conserve migration routes of wildlife animals
- Mitigate wildlife conflict with local people by wildlife-based development and/or fencing programme

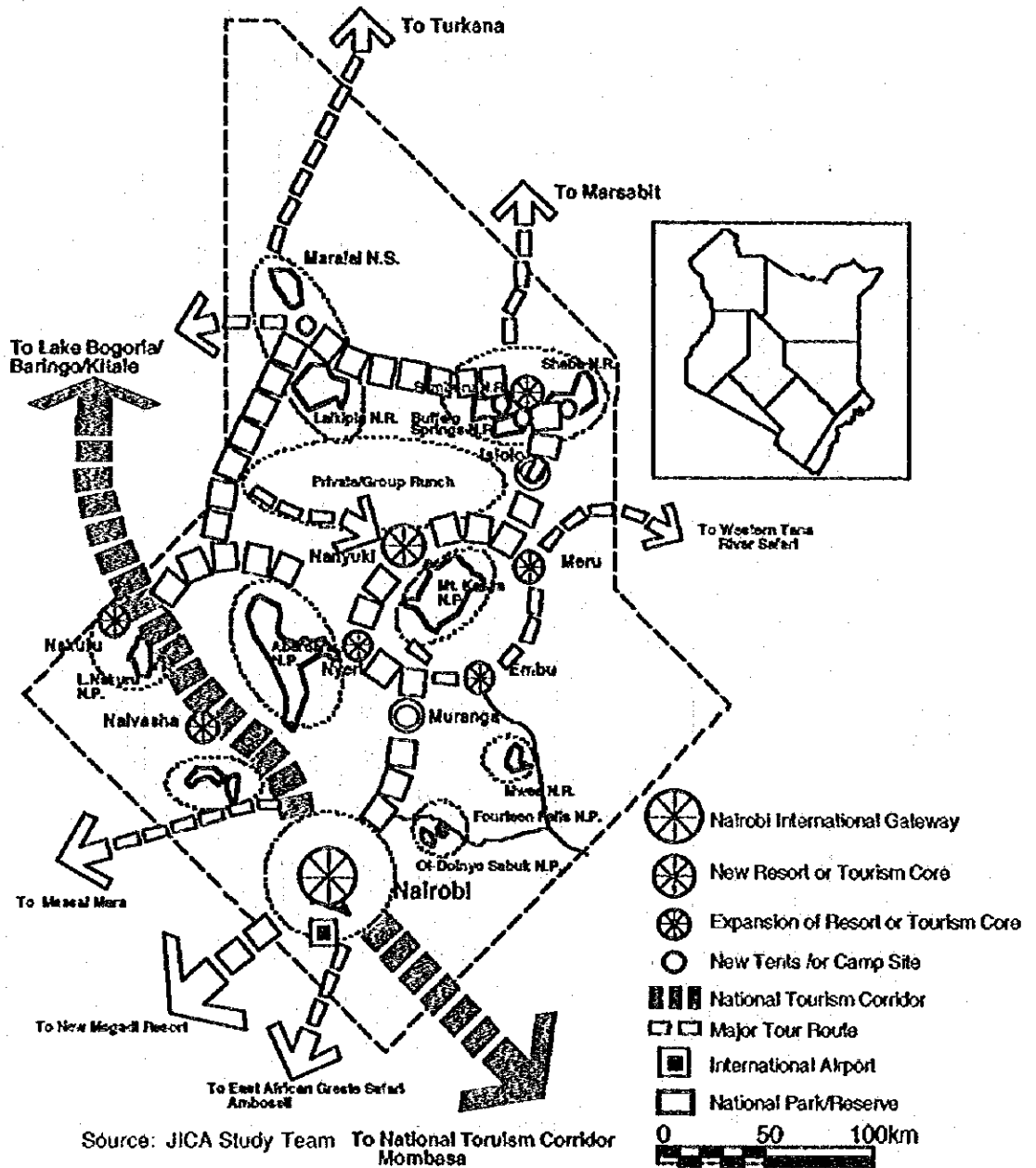
The following Table 3.2 and Figure 3.2 show the planned tourism products and the spatial structure of the tourism region, respectively.

Table 3.2 Tourism Products Matrix In the Central Tourism Region

	Nairobi	Nakuru & Naivasha	Aberdare	West Samburu	East Samburu	Nanyuki	Embu & Muranga
Swahili Townscape							
Ruins and Historical Sites	• Conservation of colonial architectures	• Improvement of Hyrax Hill Museum					
Regional Cultural Museums	• Improvement of National Museum • Improvement of Science Museum • Improvement of Nairobi Botanical Garden • Improvement of Railway Museum • Improvement of Karen Blixen Museum		• Kikuyu cultural museum development				
Local Food	• Utilisation of game meats • Fresh water fish utilisation						
Local Specialities	• Promotion of Kenyan contemporary arts and culture						• Promotion of Machakos Carving
Private Ranch			• Private ranch tourism	• Private ranch tourism • Promotion of Laikipia group ranch cooperative		• Private ranch tourism	
Village Tourism							
Cruise Ship Tourism							
Rail Safari	• Nairobi-Kitale Rail Safari						
Nature and Wildlife	• Improvement of Nairobi N.P. • Improvement of Fourteen Falls/Ot-Doinyo N.P.	• Improvement of Nakuru N.P. • Improvement of Hell's Gate N.P. • Improvement of Longonot N.P. • KWS Ranger Training Course	• Improvement of Aberdare N.P.	• Improvement of Laikipia N.P. • Improvement of Mararal N.P.	• Improvement of Samburu N.R. • Improvement of Buffalo Springs N.R. • Improvement of Shaba N.R.	• Installation of trekking routes for beginners • Improvement of Mt. Kenya N.P.	• Improvement of Mwea N.P.
Resort	• Nairobi Suburban resort development	• South Naivasha spa resort • Nakuru Lake resort				• Mt. Kenya Gateway Resort	
Convention	• Improvement of Kenyatta Conference Centre						

Source: JICA Study Team

Figure 3.2 Spatial Structure of the Central Tourism Region



3. The Masailand Tourism Region

3.1. Regional Concept

The wildlife and eco-tourism destination in Kenya

3.2. Target Market

- Up-market general interest tourists
- Tourists who seek for wildlife and eco-tourism
- Weekend trips from Nairobi

3.3. Development Scenario and Strategy

- As for Masai Mara, shift target market towards the low-volume high-income direction, as the area suffers from over utilisation and has sufficient competitiveness in the safari market
- Control utilisation of wildlife resources for safari, and introduce alternative wildlife tourism such as walking safari, airship safari, and toy train safari
- Utilise wildlife resources outside of Masai Mara National Reserve
- Establish the East African Great Safari Circuit (Nairobi-Masai Mara-Serengeti-Ngorongoro-Lake-Manyara-Amboseli-Nairobi) making Masai Mara and Amboseli the gateways
- Create a new resort area targeted at Nairobi residents at Lake Magadi

3.4. Infrastructure Development

- Improve access roads to Masai Mara National Reserve, Magadi and Amboseli National Park
- Prevent air traffic accidents from flying birds (relocation of garbage disposal sites and improvement of garbage disposal system)

3.5. Environmental Considerations

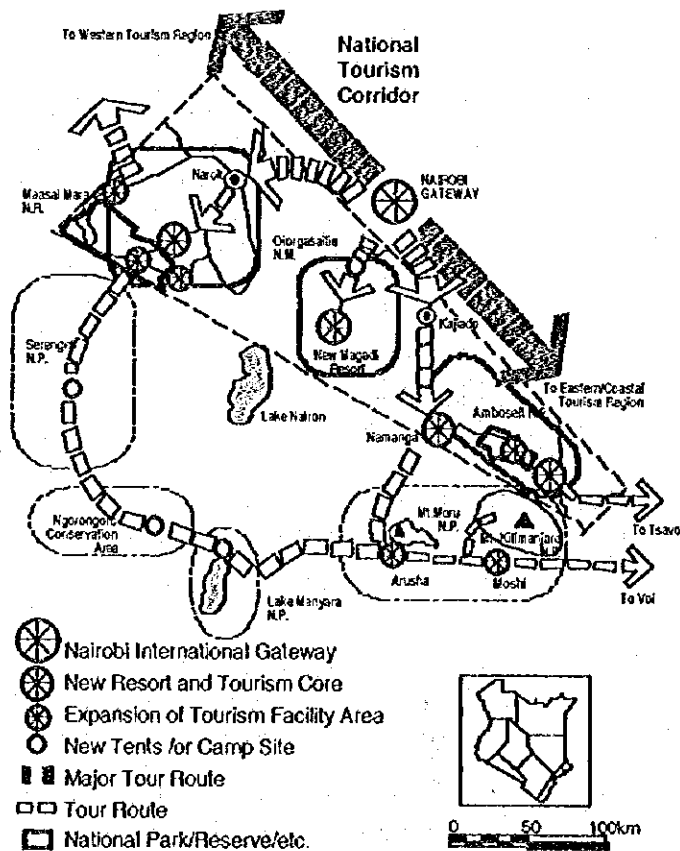
- Establish a better safari system: training and licensing for safari drivers and introduction of alternative transportation (solar cars, electric cars, low noise/pollution cars)
- Introduce a new balloon safari system (regulation for noise (low noise nozzle), flying height, landing, fire use)
- Conserve migration routes of wild animals

Table 3.3 Tourism Products Matrix for the Masailand Tourism Region

	Amboseli	Mid Masailand	Masailand
Swahili Townscape			
Ruins and Historical Sites			
Regional Cultural Museums		• Upgrading of Olorgesalie field museum	• District museum for Masai culture
Local Food			
Local Specialities			
Private Ranch			• Introduction of private ranch tourism
Village Tourism			• Introduction of Masai village tour
*Cruise Ship Tourism			
*Rail Safari			• Travelling Treetops (toy train safari)
Nature and Wildlife	• Tourist base development outside of the reserve	• Lake Magadi bird sanctuary	
Resort	• Namanga tourist facility area	• Lake Magadi resort development	• Keekorok/ Olukai tourist facility area
Convention			

Source: JICA Study Team

Figure 3.3 Spatial Structure of the Masailand Tourism Region



Source: JICA Study Team

4. The Western Tourism Region

4.1. Regional Concept

Highland resorts and cultural tourism: a place to experience African country life

- Mountain resort
- An advanced safari destination
- African village life

4.2. Target Market

- Tourists, who have experienced a safari in Kenya: advanced safari tourists
- Tourists, who are interested in local cultures in Kenya
- Special interest tourists for ornithology, entomology, and ecology

4.3. Development Scenario and Strategy

- Establish Baringo Lake resort
- Establish Kericho Highland Resort (short-start, mid- establish, long-maturalise)
- Improve urban amenities in Kisumu
- Promote "forest walk" in Kakamega National Park
- Establish the Kitale - Mt. Elgon highland resort
- Promote Mt. Elgon Safari

4.4. Infrastructure Development

- Improve and up-grade Kisumu Airport and the railway station
- Improve and up-grade railway stations at Eldoret and Kitale to introduce Rail Safari
- Improve and up-grade the Kisumu port for Victoria Lake Cruise
- Improve access roads to tourism areas and assets
- Supply electricty to the Mt. Elgon resort area

4.5. Environmental Considerations

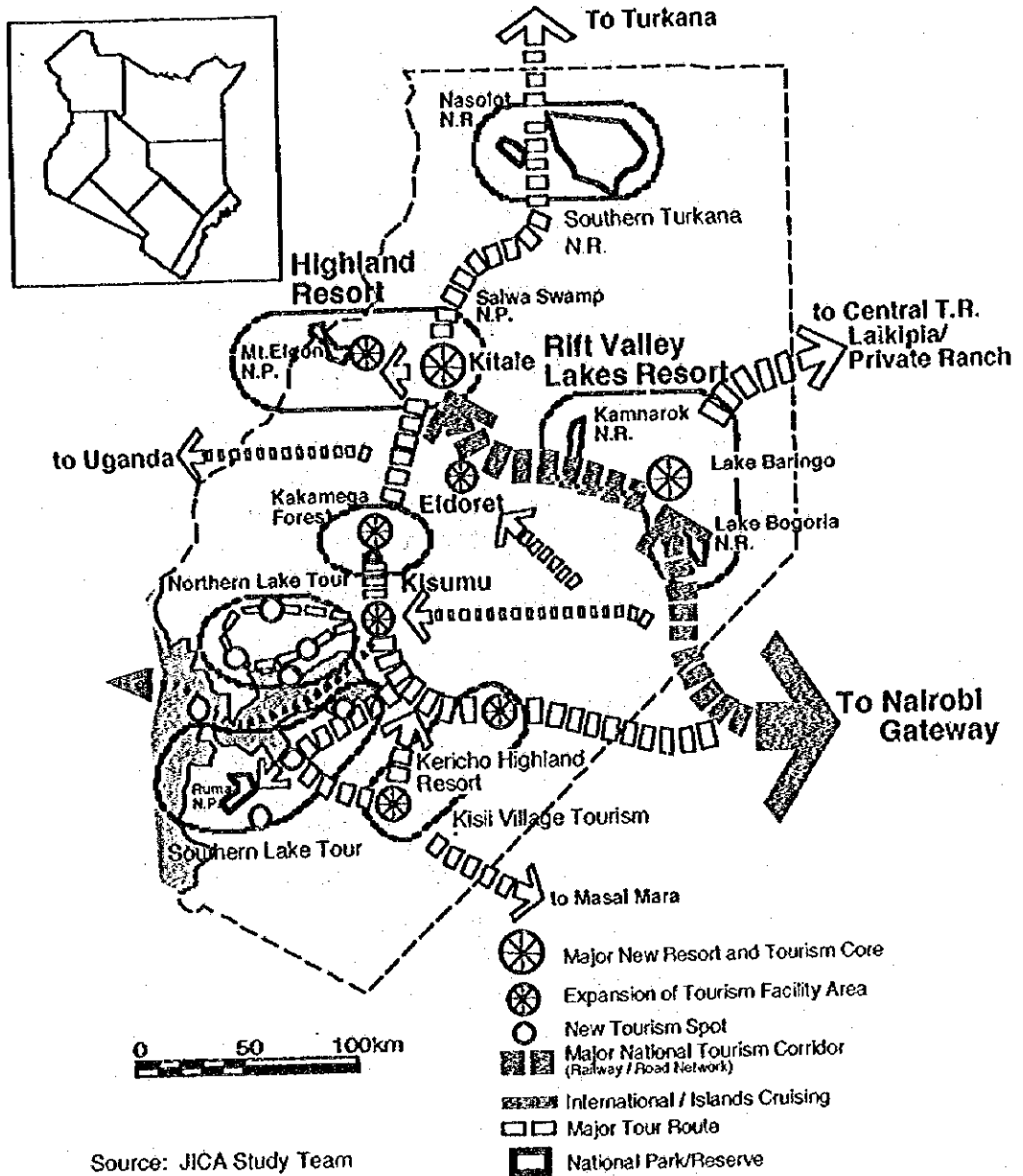
- Conserve water quality of Lake Victoria/Bogoria/Baringo
- Conserve montane forest on Mt. Elgon National Parks and Tropical rain forest in Kakamega NR

Table 3.4 Tourism Products Matrix for the Western Tourism Region

	Kericho & Kisii	Kisumu and Victoria Lake shore	Mt. Elgon/Kitale	Pokot	Rift Valley Lakes
Swahili Townscape					
Ruins and Historical Sites	<ul style="list-style-type: none"> • Fort Teman park development • Songhor park development 	<ul style="list-style-type: none"> • Thimlich Ohinga park development • Conservation of Rusinga wall painting 			
Regional Cultural Museums	<ul style="list-style-type: none"> • Kericho Museum development 	<ul style="list-style-type: none"> • Improvement of Kisumu Museum 	<ul style="list-style-type: none"> • Improvement of Kitale Museum 		<ul style="list-style-type: none"> • Development of Kabarnet museum
Local Food		<ul style="list-style-type: none"> • Promotion of Victoria lake foods 			
Local Specialities	<ul style="list-style-type: none"> • Promotion of Kericho tea plantation tour • Kisii soapstone museum & workshop development 				
Private Ranch					
Village Tourism	<ul style="list-style-type: none"> • Pilot village tourism project in Kisii 				
Cruise Ship Tourism		<ul style="list-style-type: none"> • Introduction of Victoria Lake cruise 			
Rail Safari			<ul style="list-style-type: none"> • Nairobi-Kitale Rail Safari 		
Nature and Wildlife	<ul style="list-style-type: none"> • Introduction of Kisii hill trekking 	<ul style="list-style-type: none"> • Improvement of Ruma N.P. • Development of Sindi Lake crater • Improvement of Kakamega N.R. 	<ul style="list-style-type: none"> • Improvement of Mt. Elgon N.R. • Improvement of Saiwa Swamp N.P. 	<ul style="list-style-type: none"> • Improvement of Nasolot N.R. • Improvement of South Turkana N.R. 	<ul style="list-style-type: none"> • Improvement of Lake Bogoria N.P. • Promotion of bird-butterfly watching in Kamnarok & Kerio Valley
Resort	<ul style="list-style-type: none"> • Kericho highland resort development 	<ul style="list-style-type: none"> • Victoria Lake resort development • Kakamega resort development 	<ul style="list-style-type: none"> • Development of Mt. Elgon resort 		<ul style="list-style-type: none"> • Lake Baringo resort development • Improvement of Kamnarok N.R.
Convention					

Source: JICA Study Team

Figure 3.4 Spatial Structure of the Western Tourism Region



Source: JICA Study Team

5. The Turkana and Northern Tourism Regions

5.1. Regional Concept

Lake resort and desert safaris: a place to experience real wilderness

5.2. Target Market

- Advanced safari tourists and "soft" adventurers
- Camping safari lovers
- Up-market air safari tourists
- Tourists, who prefer less congested places for safaris
- Special interest tourists for archaeology, ethnography and wildlife

5.3. Development Scenario and Strategy

- Shift target market from real adventurers to soft adventurers (air safaris, camping safaris) by upgrading travel conditions
- Apply the low-volume high-income strategy, where possible
- Establish a Turkana Lake cruise route
- Establish Central Turkana Lake Resort
- Initiate Northern Turkana safari and archaeological tourism
- Establish Southern Turkana Lake Resort
- Improve and up-grade Marsabit safari
- Utilise Losai National Park
- Formulate the Northern Desert Circuit (Central TR - Marsabit - Turkana)
- Appeal the difference of wildlife compared to major parks in the South

5.4. Infrastructure Development

- Improve airport facilities at Lake Turkana
- Establish lake transportation network for East, West and islands
- Improve and up-grade access roads from Samburu to Lake Turkana and Marsabit

5.5. Environmental Considerations

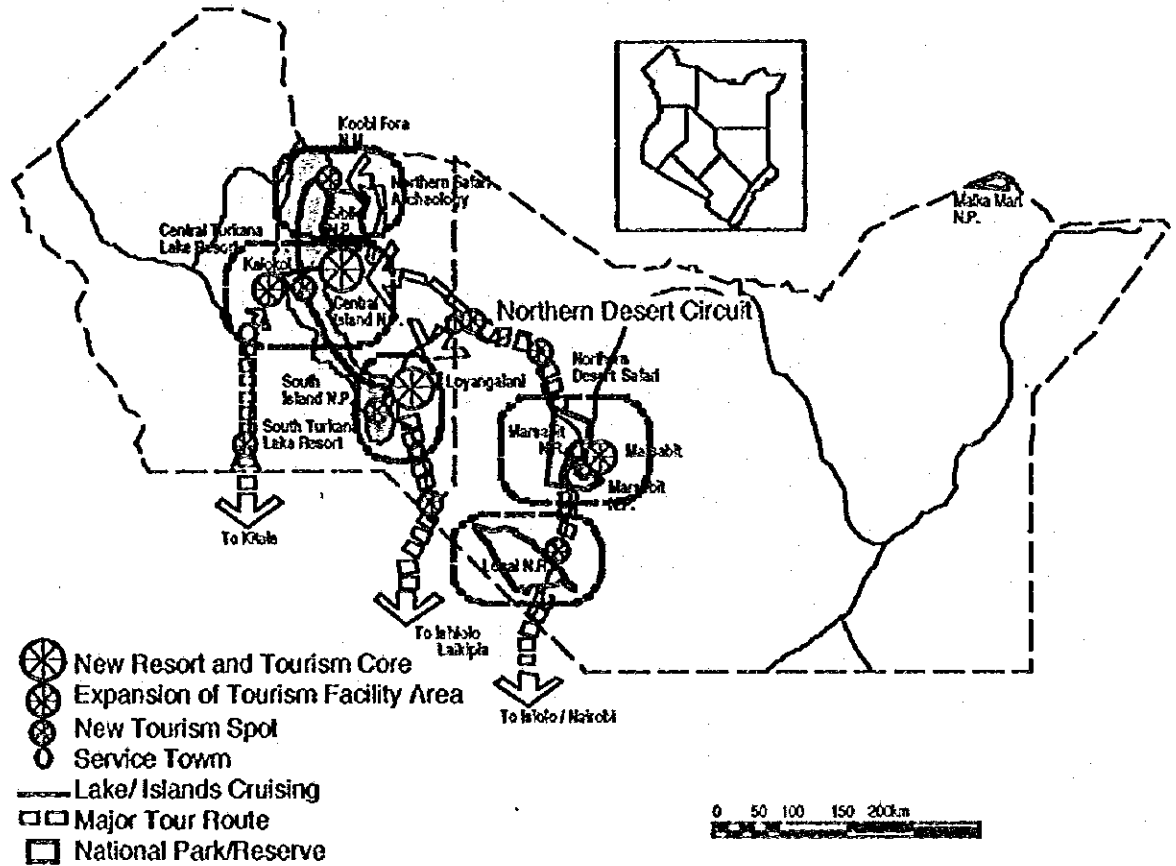
- Improve supporting facilities for tented safaris to prevent the environmental deterioration of delicate arid and semiarid land

Table 3.5 Tourism Products Matrix for the Turkana and Northern Tourism Regions

	Northern Turkana	Mild Turkana	Southern Turkana	Marsabit	Local
Swahili Townscape					
Ruins and Historical Sites					
Regional Cultural Museums	Improvement of Koobi Fora National Monument and field museum	Turkana district museum			
Local Food					
Local Specialties					
Private Ranch					
Village Tourism					
Cruise Ship Tourism	Turkana Lake Cruise				
Rail Safari					
Nature and Wildlife	Improvement of Sibiloi National Park	Central Island Cruise and Safari Introduction of fishing and water sports programme	Introduction of South Island cruise and safari	Introduction of Marsabit safari programme	Improvement of Losai National Reserve
Resort		Allia Bay Lake Resort	Loyangalani tourist facility area development	Marsabit tourism core development	
Convention					

Source: JICA Study Team

Figure 3.5 Spatial Structure of the Turkana and Northern Tourism Regions



Source: JICA Study Team

6. The Tana Basin Tourism Region

6.1. Regional Concept

Adventurous river safari and rafting: a fluvial wildlife destination

6.2. Target Market

- Adventurous tourists
- Tourists with interest in rafting
- Air safaris
- Special interest tourists for wildlife and ornithology

6.3. Development Scenario and Strategy

- Initiate and establish Western Tana Basin Safari (short-, mid-expansion, long-expansion/mature)
- Establish new tourism cores and resting spots along Tana river (short-start, mid-expansion, long-expansion)
- Establish river rafting and cruising safari and utilisation of Arawale, Tana River Primate National Reserves and Garsen Birdlife Sanctuary (short-, mid-start, long-expansion)
- Enforce a link with the coast (Malindi and Lamu)

6.4. Infrastructure Development

- Develop river cruise stations and other jetty facilities on overnight spots
- Improve access roads to Meru National Park and new tourism cores
- Improve and up-grade major safari routes

6.5. Environmental Considerations

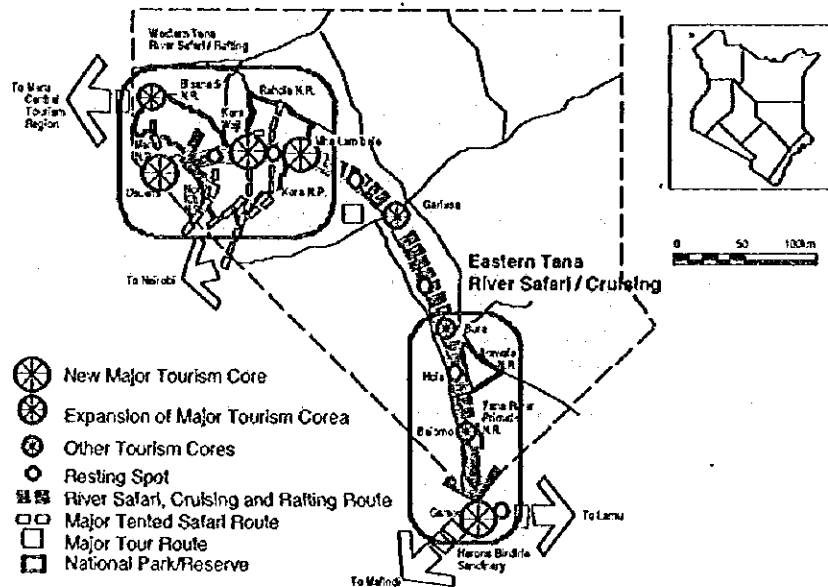
- Conserve riverine forest along Tana River to prevent soil erosion

Table 3.6 Tourism Products Matrix for the Tana Tourism Region

	Western Tana Basin	Mid Tana Basin	Eastern Tana Basin
Swahili Townscape			
Ruins and Historical Sites			
Regional Cultural Museums		• Garissa District museum	
Local Food			
Local Specialties			
Private Ranch			
Village Tourism			
Cruise Ship Tourism			
Rail Safari			
Nature and Wildlife	• Upgrading of Meru National Park and facility area development • Initiation of Bisanadi National Reserve	• Promotion of Tana River Rafting	• Utilisation of Arawale and Tana Primate National Reserve • Promotion of Tana River Rafting
Resort	• Tana River tourist base development (Usuemi)	• Tana River tourist base development (Garissa)	• Tana River tourist base development (Garsen)
Convention			

Source: JICA Study Team

Figure 3.6 Spatial Structure of the Tana Tourism Region



Source: JICA Study Team

7. The Coastal Tourism Region

7.1. Regional Concept

Coral coast and Swahili culture: the centre for beach resort tourism in East Africa

7.2. Target Market

- Beach resort tourists from Europe
- Cultural tourists for Swahili cultural heritage from Europe, North America and the Pacific Rim
- "After-safari" tourists from inland East Africa

7.3. Development Scenario and Strategy

- Improve urban amenity and the gateway functions in Mombasa
- Improve tourism core and expansion of Diani/Tiwi Beach Resort
- Improve Simba Hill National Reserve
- Establish New Funzi Marine Resort
- Expand and improve Northern Mombasa Beach Resort
- Establish New Kilifi Marine Resort
- Expand Watamu Beach Resort and improve tourism cores and Swahili cultural assets
- Improve urban amenity and expand Malindi Coastal Resort
- Establish Island Resorts with Swahili townscape
- Initiate the Northern tourism area targeting at the up-market segment

7.4. Infrastructure Development

- Improve seaport facilities for cruise ships (Lamu and Mombasa)
- Improve and up-grade airport facilities in Malindi, Manda and Pate
- Improve water supply to the coastal tourism areas
- Improve power supply to the coastal tourism areas Lamu and Pate

7.5. Environmental Considerations

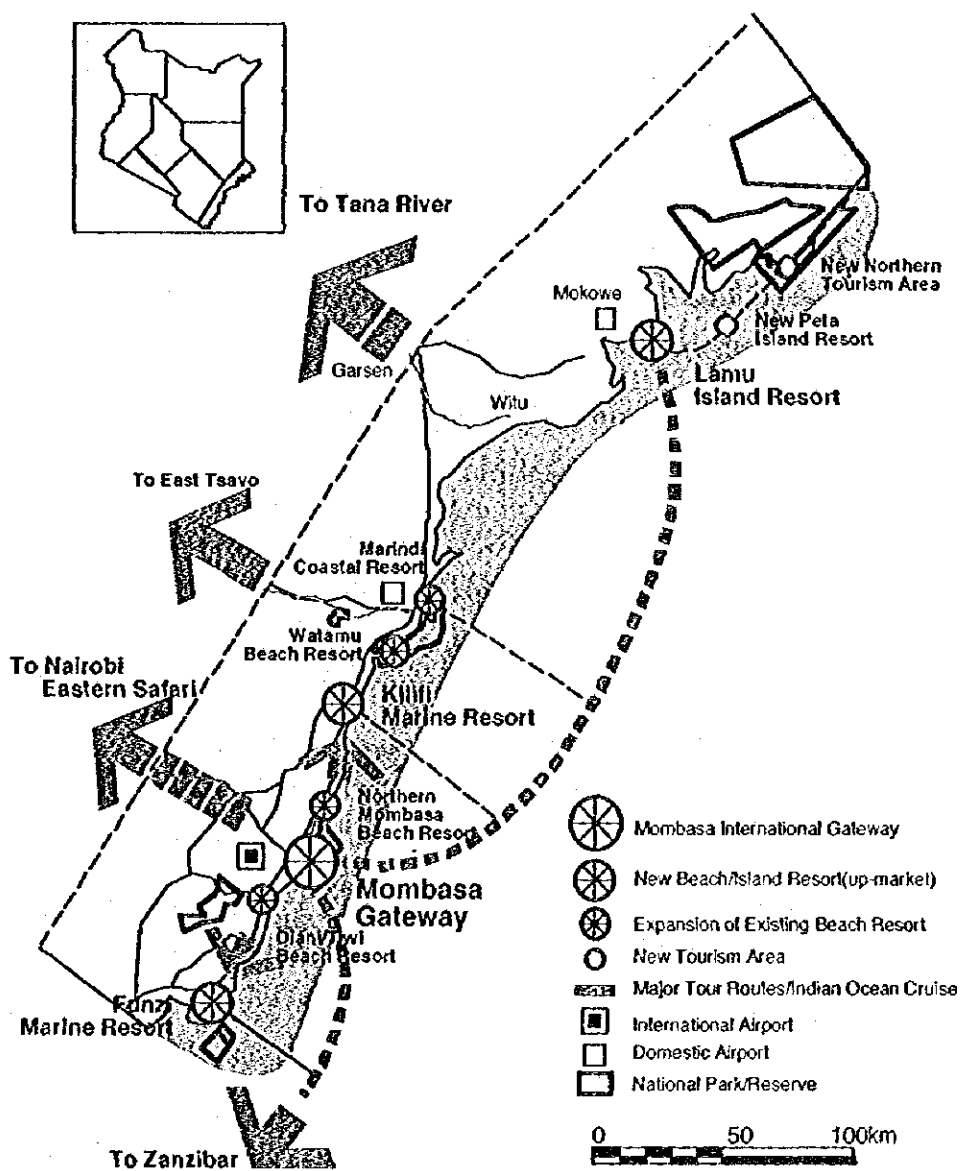
- Conserve coastal marine ecosystem, particularly mangrove forests to prevent beach erosion
- Improve and establish sewage treatment and garbage collection system
- Conserve coastal forest, particularly Arabuko-Sokoke forest and Kaya forests

Table 3.7 Tourism Products Matrix for the Coastal Tourism Region

	Mombasa town	South Mombasa Coast	North Mombasa Coast	Malindi	Lamu	Northern Coast
Swahili Townscape	• Conservation of Mombasa Old Town	• Conservation of traditional village			• Conservation of Lamu Old Town	
Ruins and Historical Sites			• Jumba la Mtwapa historical park development	• Mnarani historical park development • Gedi historical park improvement • Mgongari historical park development • Vasco da Gama Pillar park development • Jamandani historical park development		
Regional Cultural Museums	• Improvement of Fort Jesus Museum				• Improvement of Lamu Museum	
Local Food	• Swail seafood promotion • Improvement of seafood distribution system					
Local Specialities	• Kanga product promotion (work shop visit)					
Private Ranch						
Village Tourism						
Cruise Ship Tourism	• Improvement of Mombasa port for cruise ship				• Improvement of Lamu port facility	
Rail Safari	• Introduction of Nairobi-Kitale Rail Safari					
Nature and Wildlife		• Improvement of Shimba Hill N.P. • Promotion of Funzi as a diving destination • Introduction of turtle's breeding watching • Introduction of Robinson Crusoe Tour	• Introduction of Mtwapa Creek Boat Safari	• Improvement of Arabuko Sokoka N.R. • Improvement of Tsavo N.P. • Improvement of Malindi N.P. • Introduction of Kilifi Creek boat safari • Introduction of turtle's breeding watching	• Introduction of Manda mangrove cruise & installation of mangrove observation deck • Introduction of turtle's breeding watching	• Improvement of Bori/Dodori N.R.
Resort		• Diani/Tiwi resort development • Funzi marine resort development • Shimoni marine sports complex	• Nyali Beach Resort improvement • Kenyatta Beach improvement • Mtwapa Beach improvement	• Kilifi Marine resort and marina development • Watamu beach resort development • Malindi resort complex development	• Manda Island resort development • Lamu Island resort development • Pate Island resort development	• Kunga marine/safari resort development
Convention	• Promotion of resort incentive conventions					

Source: JICA Study Team

Figure 3.7 Spatial Structure of the Coastal Tourism Region



Source: JICA Study Team

8. The Eastern Tourism Region

8.1. Regional Concept

Safari destination within easy reach from the beaches

8.2. Target Market

- Beach resort tourists from the coast (mostly Europeans)
- Tourists, who wish for easy wildlife safaris (beach resort tourists)
- Rail Safari
- Transit tourists from Nairobi to the coast

8.3. Development Scenario and Strategy

- Substitute Masai Mara to relieve its congestion by appealing to the price competitiveness and the convenience to visit
- Promote utilisation of East Tsavo National Park, establish safari programmes and develop tourism facility areas in and outside the park
- Enforce transportation links with Northern Tanzania
- Improve urban amenity, up-grade service town function and establish a new Railway Safari centre in Voi
- Introduce KWS Ranger Training Courses in Voi
- Improve tourist facility areas in and outside of West Tsavo National Park
- Improve and up-grade resting spots along the Mombasa-Nairobi corridor

8.4. Infrastructure Development

- Improve main safari road networks for Tsavo East and Tsavo West
- Improve and up-grade railway network and stations

8.5. Environmental Considerations

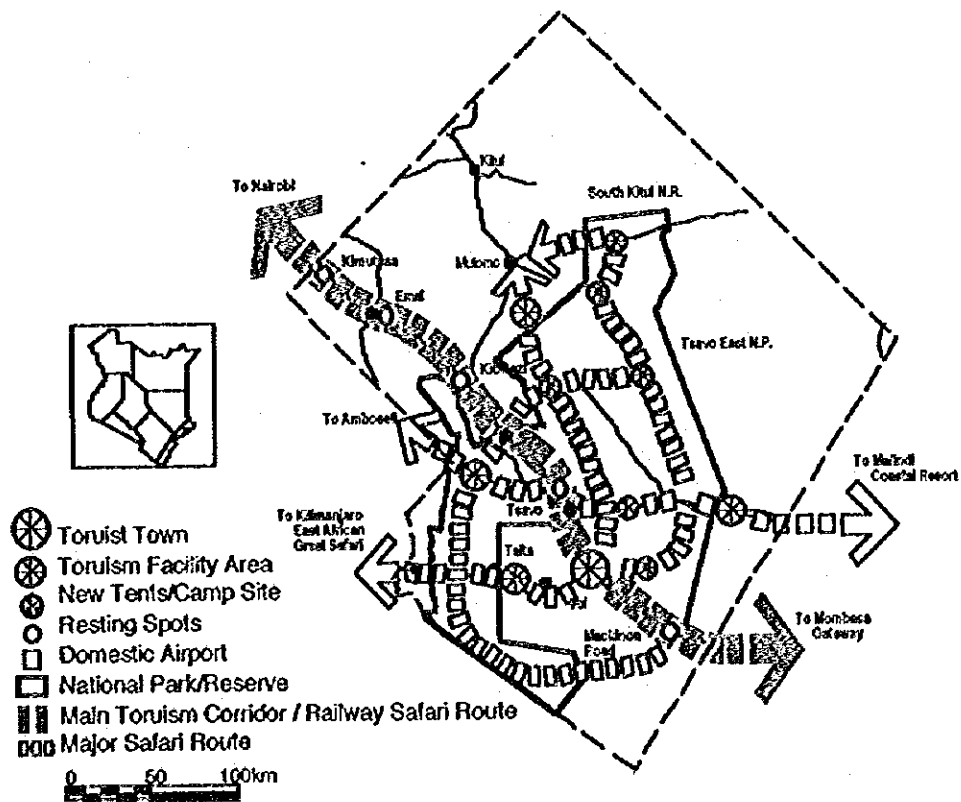
- Develop or improve supporting facilities and systems for wildlife migration along the Nairobi-Mombasa corridor
- Establish a better safari system: training and licensing for safari drivers and introduction of alternative transportation
- Reinforce management of Tsavo East/West National Parks as they are the largest protected areas in Kenya, representing her typical ecosystem

Table 3.8 Tourism Products Matrix for the Eastern Tourism Region

	Chyulu	Eastern Tsavo	Mid Tsavo	Western Tsavo
Swahili Townscape				
Ruins and Historical Sites				
Regional Cultural Museums				
Local Food				
Local Specialities				
Private Ranch				
Village Tourism				
Cruise Ship Tourism				
Rail Safari			<ul style="list-style-type: none"> • Voi Rail Safari Centre Development • KWS Ranger Training Courses 	
Nature and Wildlife	<ul style="list-style-type: none"> • Introduction of Mountain Safari in Chyulu National Park 	<ul style="list-style-type: none"> • Utilisation of the Northern part of Tsavo East National Park • Initiation of South Kitui National Reserve 		<ul style="list-style-type: none"> • Development of Northern tourist base • Development of Taita tourist base
Resort		<ul style="list-style-type: none"> • Development of tourist bases in Tsavo East National Park 		
Convention				

Source: JICA Study Team

Figure 3.8 Spatial Structure of the Eastern Tourism Region



Source: JICA Study Team

