CHAPTER 4   PROMOTION OF COMMUNITIES' PARTICIPATION IN TOURISM
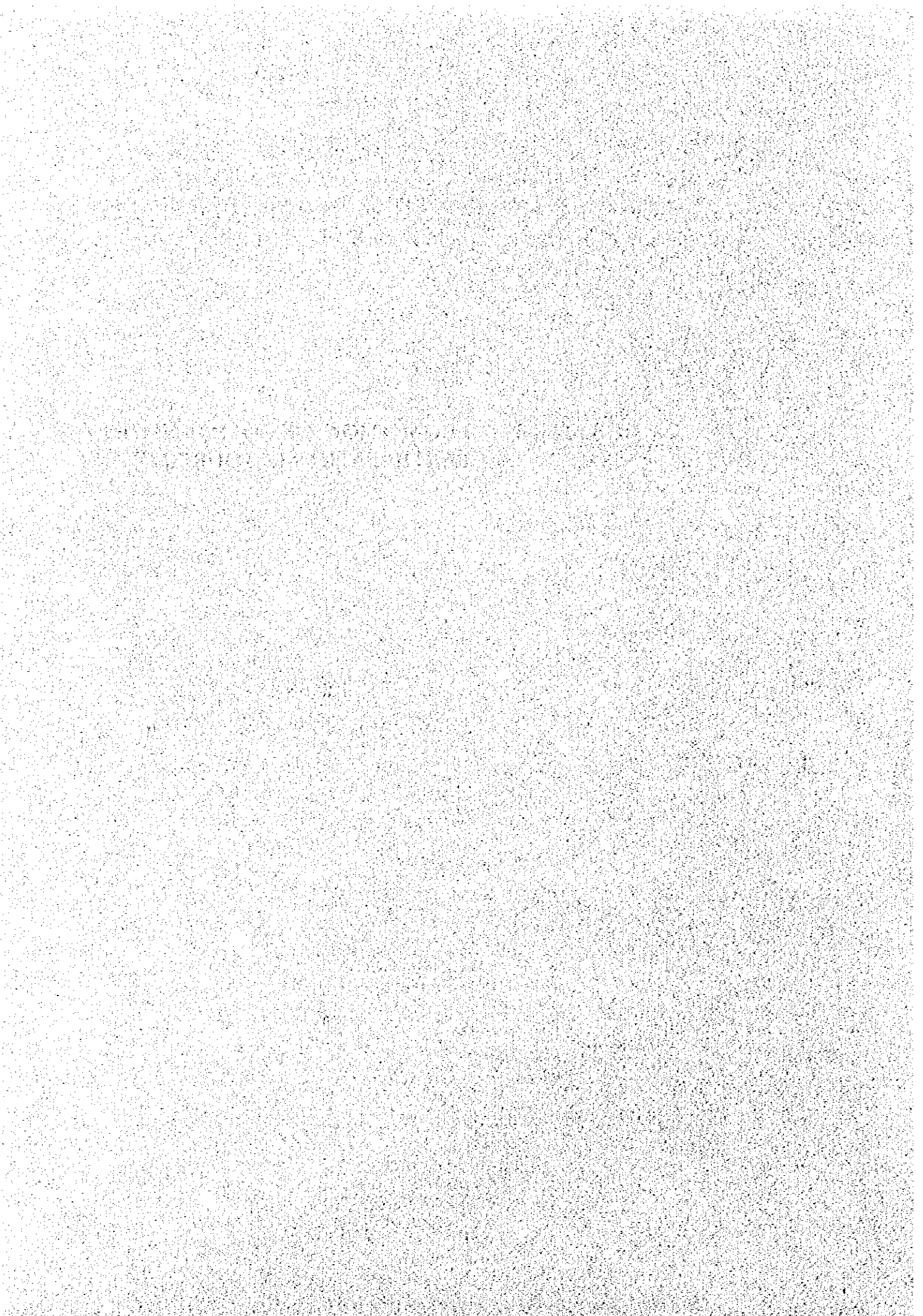
Chapter 4 Promotion of Communities' Participation in Tourism

1. Promotional Measures for Kenyan SME Tourism Enterprises

1.1. The Type of SME Tourism Enterprises

There are no comprehensive data on the total number of SME tourism enterprises, their main characteristics and constraints and sector specific development requirements. However, it is apparent from the interviews with hotel establishments, tour operators and associations that SMEs play an important role in both, the domestic and foreign tourism markets. SME tourism enterprises may be typically classified as comprising the following tourism related activities on a small scale basis:

- Family type tour operators (with only one bus), which operate on a local, at most regional basis

- Family type private inns, hotels, lodges and ranches with only a very limited number of rooms and catering for small tourism niche markets in the lower and higher market segments

- Family type small size restaurants with only a very limited number of tables and catering for small niche markets

- Individual tour guides, which operate in a specific local area with which they are familiar in detail

- Individual and small groups of agricultural and fishery producers, which supply tourism hotels and restaurants with fresh vegetables, fish, flowers, juice and so on

- Other individual or small groups of individuals, which provide services and/or goods (such as tourism artefacts) to the tourism sector.

While the above list does not claim and does not need to be comprehensive, it nevertheless illustrates the type and scope of tourism related SMEs, which should be targeted for specific policy support measures.

1.2. Prevailing Constraints for SME Development

As with the case for SMEs in other economic sectors, such establishments are typically constrained by:

- The size problem resulting in small business turnover, which is mostly translated into family income and the therefore small capacity to save and invest in the expansion or upgrading of the business

- The limited access to information, in particular market information and information on available support measures and programs

- The limited access to working capital and investment financing often caused by the non availability of any collateral, and

- The lack of business training.

1.3. Policy and Support Measures for Tourism SME Development

The GOK has a national policy for the support and strengthening of SMEs in all economic sectors and the GOK recognises the important contribution, which SMEs make in terms of income generation and employment creation. Likewise, Kenya has an extensive network of institutions promoting SMEs. It is, therefore, not necessary to reinvent a general support policy for the promotion of SMEs, but rather to highlight the major aspects, which are tourism sector specific. Those relate mainly to financial, training and information support.

1.3.1. Financial Support

Access to finance for working capital and/or business expansion is vital for the success and development of SMEs. Two approaches of solving the collateral problem could be envisaged. One is to establish a SME fund either at KTDC or a private association, which would use the fund as collateral to the financing institution. A second way would be that SMEs form clusters or co-operatives and the cluster or co-operative members provide the security for member loans. In the absence of any detailed information of tourism SMEs on which alternative they prefer, it is rather difficult to recommend one or the other of the two. Experience in other countries show that both approaches are practical and feasible.

1.3.2. Training Support

There is a strong need in SMEs for training in advanced business and management techniques. Such tourism sector specific training could be provided in the form of short and/or crash courses at either the Utalii College or a relevant private association. It has to be remembered in this context that SMEs are typically human resource constrained and can simply not afford to release an enterprise member for a lengthy period of time. Courses offered should therefore be practical in orientation and short in duration.

It may also be helpful in this context to establish at the Utalii College, the Kenya Institute of Business Training (KIBT) or the association a

"Business Support/Consultancy Window", where SMEs can obtain, on an ad-hoc basis, advise on simple business related matters.

1.3.3. Information Services

It is suggested to establish a central information service network at the proposed Tourist Board, the function of which would be to provide SMEs on a regular basis with information on market trends in the tourism sector, business opportunities and so on. Such information could be disseminated in form of a regular newsletter.

1.3.4. Other Support Measures

Other direct support measures are situation and circumstance specific. For example, in the coastal area fresh fish served in speciality restaurants or hotels is bought from SME local fishermen. Those fishermen have no adequate cooling and storage facilities. It may therefore be useful to explore possibilities to support the business of such fishermen by constructing a small ice plant together with small cooling facilities.

Other direct support measures may be identified in the context of the withdrawal of the GOK from investments in over twenty separate hotel business. Such withdrawal may be directed towards local indigenous SMEs, which have the capability and willingness to take these businesses over.

2. Human Resources Development

2.1. Introduction

Hospitality plays an important role in tourism. Since a service is provided from people to people, all personnel must be properly trained and educated. However, the service standards of the tourism sector in Kenya is still below the satisfactory level with some exceptions, and only few people seem to realise the importance of "service."

In this context, human resources development in the tourism sector would be one of the key issues for the future tourism development in Kenya. It is vital to provide an adequate training system for the personnel engaged in tourism to meet the demand from tourism related establishments.

It should also be noted that conservation of wildlife largely depends on those engaged in tourism, such as ranch wardens in parks and ranches, drivers/guides and naturalists. Education and training to provide accurate knowledge of environmental science, both for conservation of resources and for tourism use of natural resources, is important. The services provided by well trained and environmental conscious guides, naturalists and park staff will surely promote the image of Kenya. Demand for well-trained personnel is supposed to increase not only in national parks, but also in various private tourism related establishments such as hotels, private ranches, tour operators and transportation companies.

2.2. Demand for Training in the Tourism Sector

2.2.1. Employment Generation by Tourism Sector

The total number of direct employment in the tourism sector in the designated years of 2000, 2005 and 2010 are estimated to be 116 thousand, 171 thousand and 225 thousand people, respectively. It is estimated that tourists' accommodation facilities, that includes hotels, lodges, camps, ranch, apartments/villa and tents, generate 43 % of direct employment. The remaining 57 % of employment is generated by other tourism related establishments, such as travel agents, tour operators, transportation companies, guides, restaurants and so on. Table 4. 1 shows the direct employment in the tourism accommodation facilities and the others.

Table 4. 1   Direct Employment In Tourism Sector

Unit: 000 employees

Year	1993	2000	2005	2010
Accommodation	38	55	80	106
Other	50	72	107	140
Total	88	127	187	246

Source: JICA Study Team

2.2.2. Demand for Training

The tourism sector will generate a total of 158 thousand new employment up to the year 2010. It means that 10.5 thousand new jobs are created every year. The distribution of tourism employment by level of responsibility is assumed as shown in Table 4. 2.

Table 4. 2   Distribution of Tourism Employment by Level of Responsibility

Level	Level of Responsibility	Tourists Accommodation	Other Activities
1	Management & Administration	6%	17%
2	Middle Manager/supervisor	17%	30%
3	Regular personnel	50%	25%
4	Service staff	27%	28%
	Total	100%	100%

Note :   Assumption is made based on the Survey in Tunisia in 1974, in the World Bank Report Tourism Passport to Development. Modification made by the Study Team.
Source : JICA Study Team

Those belonging to levels 1 to 3 in the table should have any form of training. However, it is impossible to make available for all of them the full time education in the formal educational institutions, such as university, college, technical training institute. Other than the full time courses, part time courses, refresher courses, short and/or induction courses, apprentices system should be provided for the rest.

Assuming that the tourism sector creates yearly 10.5 thousand new jobs, and all the level 1 to 3 employees are trained, the demand for tourism training will be as shown in Table 4. 3.

Table 4. 3   Number of Trainees In a Year

	Responsibility	Accommodations	Other Activities
1	Management & Administration	270	950
2	Middle Manager/supervisor	770	1,650
3	Regular personnel	2,260	1,400
	Total	3,800	4,000

Source : JICA Study Team estimation

The following types of tourism education and training courses are currently available in Kenya on a full-time basis.

Table 4. 4   Types of Institutions in Kenya

Type of Institution	Responsibility level
University	
Master level	Management & Administration
Bachelor Level	Management & Administration
College	
Diploma(4 years level)	Management & Administration
Associate Diploma	Middle management
Technical Training Institute	
Certificate (high level)	Middle management &Regular Staff/ Supervisor
Certificate (primary level)	Regular Staff

Source: JICA Study Team

The desirable percentage of new employees that should have full time education or training is set by the level of responsibility. The estimated training demand on a full time basis is shown in Table 4. 5.

Table 4. 5   Training Demand on a Full Time Base

Expected responsibility level	Percent	Accomodation	Others
Management & Administration	80·	220	760
Middle management	40	310	660
Regular Staff	20	450	280
Total		980	1700

Note: Above figures indicate numbers of students.
Source : Estimated by JICA Study Team

2.3.   Training Capacity in Kenya

Development of the tourism sector requires expansion of training capacity at various levels. Above all, the study team recommends to introduce tourism related training courses given by vocational schools. Technical training institutes under the Ministry of Research, Technical Training and Technology, are expected to enhance their role in tourism education.

2.3.1.   Kenya Utali College

The Kenya Utali College (KUC) is the only educational institution, which trains professionals exclusively for the tourism sector in Kenya. KUC offers various full-time courses as shown in Table 4. 6. The college, however, suffers from a lack of training capacity as well as a decline of the quality of training. Financial shortages at KUC are supposed to be the major cause for the problems.

KUC has started operation with a capacity to train 540 students in a year with an annual intake of 316 students. The actual number of students in the college was 840 in 1992/3. KUC is planning to expand its training capacity to provide various training courses, such as refresher courses, trainer training courses and it plans the establishment of a branch of KUC at the coast and an expansion of the Mobil Training Unit. The planned capacity of KUC, however, will not fully satisfy the future demand in terms of training levels and types of professions.

Table 4. 6   Full Time Courses Offered at KUC

Course	Duration	Established Capacity for Intake	Annual Intake of Students	Award
1. Hotel Management	4	124	32	Diploma
2. Travel Guide	2	46	24	Diploma
3. Travel Operation	2	58	30	Diploma
4. Front Office Operation	2	72	40	Certificate
5.Food Production	2	60	32	Certificate
6. Food & Bevarage Service & Sales (Basic)	1	92	96	Certificate
7. Food & Bevarage Service & Sales (Advanced)	1	32	32	Certificate
8. House Keeping and Laundry	2	56	30	Certificate
Total	-	540	316	

Source : Kenya Utali College

2.3.2. Technical Training Institutes

There are twenty two (22) technical training institutes in Kenya under the Ministry of Research, Technical Training and Technology. The total number of students was 9,571 in 1984 and 5,906 in 1990, including those, who had short-term courses. The number of students shows a declining trend in recent years.

Some of these institutes already have plans to offer cooking and food and beverage services and sales training, that will actually be training courses for tourism related establishments.

2.3.3. University

There are four state universities and other private universities. There were approximately forty thousand students in the state universities in 1990/1991. These universities aim to provide the manager level education in a more general form than KUC and the technical training institutes.

2.3.4. Other Forms of Education/Training

Other than the full time courses mentioned above, the various training institutes should provide the following types of training courses.

(1) Refresher/In-service courses in all the level of Institutes

Refresher/In-service courses are an effective and important scheme to keep the level of services and skill of personnel. Opportunities for a higher level of certificate, diploma and degree would make a good incentive for students to take the courses.

(2) Apprenticeship scheme in colleges and at vocational level

An apprenticeship scheme is an effective method for students to learn the actual business and hospitality. The study team recommends a modification of the current education system to include "on the job training" in tourism related establishments.

An incentive for tourism related establishments that accept trainees is that these trainees could form a part of their work force. In some countries, the share of apprentices in hotel employment amounts from 6% to 7% of the total number of employees.

(3) Human Resource Development in the Public Sector

The employee in the tourism related public sector, who interacts with tourists, should have some form of training. Most convenient way of training would be the OJT in the source market countries. For example, OJT in Tourist Information Centers and work with tourist officers overseas under the tourist board will be easy to arrange. The tourist offices should be represented by the local officer of the designated country.

Providing part time courses for staff in the public sector in KUC will be convenient to acquire a general knowledge of the tourism sector.

2.4. Expansion of Training Capacity

To meet the manpower requirements from the tourism sector, the study team recommends the following projects and programmes.

2.4.1. Expansion of Kenya Utalii College and Participation of Technical Training Institutes (TTI) in Tourism Education

(1) Kenya Utalii College

A project has been prepared by KUC to increase its training capacity. It includes new train the trainer courses and refresher/in-service courses. The project includes the following components:

- Physical expansion of the facilities of KUC Nairobi
- Additional 100 bedroom training hotel at KUC in Nairobi, and
- Establishment of a KUC Coast Branch.

Establishment of a coast branch will provide an opportunity for training at the coast, where more than half of the accommodation in Kenya concentrates. Part-time lecturers could be expected from high class hotels in the region, if an arrangement is made to allow lecturers from outside.

(2) Technical Training Institutes (TTI)

The study team recommends to introduce appropriate catering courses in four technical training institutes up to the year 2000. Restaurants could better be attached to the training institutes to supplement recurrent cost to provide catering courses. Recommended locations are as follows.

a. Nairobi Technical Training Institute

A preliminary plan has already been formulated preparing 3.2 hectare of land for the plan.

b. Mombasa Technical Training Institute

Mombasa is accessible from hotels in most parts of the coast. Outside lecturers can easily be found from hotels that provide services for international tourists.

c. Nkabune Technical Training Institute

Though it currently provides catering courses with an attached restaurant, the existing facilities of Nkabune Technical Training Institute need expansion and improvement in order to provide better training. The institute was originally founded as the Women's Social Institute in 1964 to provide education and skills for women in rural areas.

d. Kitale Technical Training Institute

As Kitale is designated as one of the important tourism centres in this Master Plan, a training institute will help to upgrade the service level in the area.

(3) Project Cost

Facility construction costs for the expansion of KUC and TTI's are shown in Table 4. 7.

Table 4. 7   Project Cost for Capacity Building

Unit : million K£

Code	Project Name	Construction Cost
KUC-1	Physical expansion of facilities of KUC Nairobi	15.8
KUC-2	Additional 100 bedroom training hotel at KUC in Nairobi	20.0
KUC-3	Establishment of KUC Coast Branch	60.0
TTI-1	Nairobi Technical Training Institute	2.5
TTI-2	Mombasa Technical Training Institute	2.5
TTI-3	Nkabune Technical Training Institute	2.5
TTI-4	Kitale Technical Training Institute	2.5
	Total	105.8

Source : JICA Study Team

2.4.2. Environmental Education by KWS

(1) Requirement for Environmental Education and Training

For the coexistence of tourism and wildlife, environmental education should be spread to a wider range of people who engage in wildlife tourism such as safari drivers and guides. Private ranches require specialists, who can monitor and manage wildlife on their properties. Local governments and the private tourism sector also need assistance from KWS to participate in wildlife tourism. Even the tour guide course at Utalii College would be better conducted with the co-operation of KWS. Moreover, environmental education could be given to tourists who seek for a Kenyan experience.

Because of its accumulated knowledge of and experiences in wildlife management, KWS is the most suitable organisation to provide environmental education.

(2) Expansion of KWS Training Program

KWS currently provides training programs for their staff in Naivasha wildlife and fisheries training institute. Although the travel trade and local governments realise the importance of environmental conservation and management education, and KWS is the only potential organisation that could provide such education, these programs are not available for outsiders.

KWS should open its training courses for the private sector, local governments, and even for tourists by expanding existing facilities to accommodate the new courses. Considering KWS's existing resources, Naivasha and Voi would be the appropriate locations for the new courses.

(3) Construction Cost for Facilities Expansion

Construction cost for the project is estimated to be 16.25 million Kenya £. It is considered to be at the same level as the KUC expansion. A further study should be conducted.

2.5. Preliminary Consideration on Institutional Arrangements

The following institutional matters should be improved for the realisation of training capacity building.

a. Educational Qualification and Licensing

An appropriate organisation should be established to set up the standards for training, skill testing, and certification for the graduates trained in KUC, technical training institutes and private training institutes.

KWS should be entitled to set up the standard for training and skill testing and certification for environmental management education. Licensing of safari drivers and guides has a special importance in KWS's licensing. The Ministry of Education should assist and supervise KWS for the provision of certificates.

Licensing for food production should aim to maintain high standards of hygiene. The Ministry of Health should assume the main responsibility for setting up the standard.

b. Laws and Regulations

KUC should be exempted from rules of the State Corporation Act in order to allow more flexibility in selecting lecturers. Arrangements should be made to enable KUC to invite part time lecturers from the outside and to introduce apprenticeship schemes for students in education institutions.

The Catering Training Levy fund should be distributed not only to KUC, but also to other training institutes that provide tourism related training courses. Besides, an appropriate training fee (tuition) should be collected from students of KUC, like is the case at other national universities.

c. Financial Arrangements

Sources of funds for tourism related training should be broadened. A Tourism Levy as proposed in this Master Plan should be spent for this purpose.

3. Seafood Development as Local Specialities

3.1. Introduction

Seafood consumption in the world is increasing, because of a global trend for increasing preference for seafood. Rich fishery resources are identified along the Kenyan coast, especially the Northern part of the coast. The Kenyan coast has a potential for developing the local specialities by using marine fish and crustaceans.

Although a large volume of foreign tourist stays in the coastal area, availability of seafood as a local speciality in the restaurants and hotels is limited. The number of restaurants and the variety of dishes are not at a sufficient level to be fully enjoyed by the tourists.

To develop seafood as a local speciality, several constraints have to be overcome.

3.1.1. Fishermen

Most of the fishermen are independent small scale fishermen. They catch fish near beaches. Their fishing boats are also small and can not fish in the coast area of more than 5 miles away from the beaches, where rich marine resources exist. The fishing technique and facilities are also obsolete.

3.1.2. Distribution and Market

In many cases fishermen have to find buyers for their fish in a day. International hotels and restaurants are the best buyer, if the demand exists when he caught fish. But if they need not to buy or have already enough stock in their refrigerators, other buyers must be found. Some times the fishermen have to sell their fish at a highly discounted price.

There are a few well-known seafood restaurants in the coastal area but, they have a constant supply of seafood from their own channels. However, most of the hotels and restaurants face supply problems. Uncertain supply conditions discourage the hotels and restaurants to promote seafood as local specialities, because it is difficult for them to provide a certain variety of menu every day. At the same time, cooking techniques for the preparation of seafood dishes are not appropriate to meet international standards. There is not enough motivation for cooking staff to learn seafood preparation. The cooking staff find less demand for the preparation of sea food dishes in restaurants.

3.2. Issues

The following issues should be overcome in order to develop seafood as a delicacy:

- Improvement of fishing facilities to meet the market demand

- Establish marketing channel to fulfil the demand and supply balance, and

- Promote seafood as a local delicacy.

3.2.1. Improvement of Fishing Facilities

The following improvement should be realised:

- Fishing boats should have adequate facilitaties to catch sufficient quantities and kinds of fishes

- Fishing boats should have some cooling facilities to keep the fish fresh

- Financial assistance should be provided for improvement, and

- Technical assistance should be provided.

3.2.2. Establishment of Marketing Channel

The following measures should be taken:

- Introduction of refrigeration cooling facilities to keep the fish fresh during distribution, and

- Establish information and marketing centre to distribute market information to the fishermen and consumers.

3.2.3. Promotion of Seafood

To promote seafood to tourists, the following measures should be taken:

- Campaign and marketing activities, and

- Provide seafood preparation training classes or courses in the training institutes.

3.3. Seafood Development Plan (short term)

(1) Improvement of Fishing Facilities

- Induce fishermen to provide a cooler box on their fishing boats

- Induce fishermen to facilitate appropriate tools on their boats

- The fisheries department in MOTW should arrange the provision of technical and financial assistance for the improvement of facilities, and

- Organise fishermen to support implementation of the project.

(2) Establishment of Marketing Channel to Fulfil the Demand and Supply Balance

- Provision of ice supply terminals to supply cooling ice to fishing boats

- Provide market information centres

- The fisheries department in MOTW should arrange the provision of technical and financial assistance for the provision of facilities, and

- Organise fishermen to support implementation of the project.

(3) Promotion of Seafood

- MOTW or a local tourism organisation should organise "Seafood Festivals" that include events such as "Best Kenyan Seafood Chef Contest" and cooking shows by guest chefs from various parts of the world. The festival should not only aim at improving the cooking skill of local people, but to entertain tourists and publise Swahili seafood.

- Provide seafood preparation courses at KUC at the coast proposed in the previous section. It should be available not only for full time students, but also for part time students, and

- Provide seafood preparation courses also at the Technical Training Institutes in Mombasa.

3.4. Swahili Seafood Distribution Project

In this Master Plan, a fresh fish supply project is proposed, including the following facilities.

(1) Construction of the Ice Supply Terminals

The proposed locations of ice supply terminals are Malindi, Watamu, Kilifi, Shimo La Tewa and Tiwi (5 locations).

(2) Build Market Information Centre beside the Ice Supply Terminal. (5 locations)

(3) Attach Cooler Box on the Fishing Boats Which Receive Ice from the Terminals (Approximately 1000 boats).

Other than the physical facilities mentioned above, the following institutional matters should be provided:

- Organise fishermen to use the ice supply terminal and market information centre

- Provide input assigned in the market information centre (MIC) and establish inter organisation relating to the operation of the MIC, and

- Provide technical and financial support for the organised fishermen.

3.5. Project Cost

3.5.1. Construction of the Ice Supply Terminals and Market Information Centre Complex.

Ice supply terminals (include ice maker and ice storage):

5 locations x @300,000 US$ = 1,500,000 US$ (3.75 mill. K£)

Market information centre (including parking building and equipment):

5 locations x @ 50,000 US $ = 250,000 US$ (0.63 mill. K£).

Total of facilities development cost : 1,750,000 US$ (4.38 mill. K£).

3.5.2. Attach Cooler box on the Fishing Boats

Each fishing boat should attach a wooden cooler box with a capacity of approximately 100 liters. Number of the boats are assumed to be 600 boats.

600 boats x @ 200 US$ = 120,000 US$ (0.3 mill. K£).

4. Promotion of Village Tourism

4.1. Definition of Village Tourism

The study team defines "village tourism" as a type of tourism, in which tourists enjoy a stay in a rural community with a local and intimate atmosphere with cultural and natural experiences. In other words, it aims to use the locality of an area, such as local products, landscape, and traditional culture for tourism, with proper arrangement to conserve and promote the uniqueness. Some could regard village tourism as a sub-category of eco-tourism that stresses the low-impact on, closer contact with and financial contribution to conserve nature and indigenous cultures.

4.2. Impacts of Village Tourism

Village tourism has the following impacts on local communities. Compared with the usual tourism development, it has considerable social benefits to the communities that tackle village tourism.

4.2.1. Positive Impacts

(1) Economic aspect

a. Increase of visitor arrivals

Village tourism increases the number of visitor arrivals to a community. It does not only increase the number of tourists, but also that of those, who visit the community for business purposes stimulated by the tourism project. These arrivals bring liveliness and boost morale of the community.

b. Increase of income

Visitors' expenditure such as transportation, accommodation, food and beverage could be income to the community, if it is willing to cater for their needs.

c. Increase of employment

The increase of income results in the increase of local employment that reduces population outflow from the village. This contributes to soothe urban problems in Nairobi.

(2) Social aspect

a. Boosting of morale

It is vital for village tourism organisers to formulate a community level consensus to tackle tourism development and to promote community members' participation in the tourism project. The experiences shared

by community members to tackle the tourism project develop a sense of unity among members and boost their morale.

b. Discovery of own characteristics

What looks very ordinary for community members is sometimes felt very exotic for tourists. Inflow of tourists to a community encourages member's awareness of their own characteristics and discovery of new pride.

c. Re-evaluation of own identity

Through further exchange with people from outside, community members come to a better understanding of themselves and re-evaluate their own identity. This, in turn, serves to conserve local traditions that could be tourism resources. A typical example is found on Bali Island in Indonesia.

4.2.2. Negative Impacts

Tourism development is supposed to have the following negative impacts on local communities. It should be noted, however, that village tourism is a challenge to work around the negative impacts with its deliberate arrangement as will be discussed in the next section.

(1) Economic aspect

a. Social changes caused by influx of income

Tourism development accompanies the penetration of market economy. This could cause abrupt social changes in rural areas where people have lived almost in self-sufficiency. Besides, the price hike that tends to follow tourism development might offset the increase in income.

b. Enlarged gap between the rich and the poor

Tourism development could enlarge the income gap between those who enjoy benefits from tourism and those who do not. This could lead to the confrontation between the two groups, and in consequence, affect the community's integrity.

(2) Social aspect

a. Cultural deterioration

Influx of tourists could introduce foreign/alien life style and values to a host community. This could impair traditional culture contrary to the optimistic view of tourism impact as previously discussed. Although there are examples of tourism that encouraged traditional culture such as Bali in Indonesia, tourism impact on traditional culture depends largely on how tourism is guided by a development organiser.

b. Moral corruption

Epicurean life style of tourists could adversely affect local people's diligence. Increased opportunities for easy income could corrupt public morals.

4.3. Seeking for Potential Tourism Resources

Potential tourism resources should be sought according to the following criteria:

- Being attractive for visitors
- Being acceptable to visitors
- Being consistent with the image of the village under planning
- Being symbolic of the village
- Having positive effects to the village
- Casting the locality of the village, and
- Satisfying market needs.

What should be presented to tourists is not the raw locality that could be too foreign for outsiders. Appropriate modification should be made according to target markets. As village tourism targets at those, who are prepared to experience real Africa, the modification could be small compared with a case that targets at charter-flight tourists.

Locality plays an important role in village tourism. Not only the visual impact but that of the other four senses, namely sound, flavour, taste and touch could be tools to represent locality. Folk costume and folk music contribute greatly to give guests a sense of arrival at the entrance of a tourist facility. Local cuisine is an experience for tourists, but the importance of local tableware is often overlooked. Tableware is not only a tool to direct locality but a potential shopping item, whose sales the dining experience promotes. Unique townscape and architecture are also potential tourism resources, which a tourism project should strive to conserve. Flavour of flowers could also serve to direct the sense of locality.

4.4. Planning of Village Tourism in the Kisii District

The study team chose Kisii for the village tourism project site as it has soapstone industry as a catalyst for tourism development. The project, however, is a pilot project to introduce the village tourism know-how to Kenya and the methodology used for the project could apply to many local communities in Kenya. With Kisii as an example, this section discusses how a local community should discover potential tourism resources, arrange them for tourists and implement the tourism plan.

4.4.1. Potential Tourism Resources in Kisii

The study team identified potential tourism resources in the Kisii area as follows:

- Gusii people still maintain their unique traditional culture, such as folk costume, music and customs

- The area has beautiful landscape composed of farmland dotted by traditional houses

- The area is a rich agriculture centre that produces tea, coffee, pyrethrum, banana, and sugar cane on a small-scale, but by independent farmers. Agriculture in the area could be combined with tourism

- The area has the famous soap stone industry that is exploitable for tourism

- Gusii people have a brave history of protecting themselves against the British and other tribes. Following some examples in Europe, this could be enacted by Gusii people themselves as a theatre play. It could also be a theme of monuments, and

- View of Lake Victoria from Manga Ridge is an important tourism resource. Very few tourists to Kenya have a chance to see the famous lake.

4.4.2. Directions for Development

This section discusses the directions and considerations for developing tourism products.

(1) Scenic view point

Build observation deck and rest facility to enjoy scenic view of Kisii hills and Victoria Lake. A small shop that sells some food, beverages and local products could better be attached to the viewing facility. Parking at the shop and pressing purchase of good is not preferable. The design of the facility including the small shop should be consistent with local architectural style.

(2) Plant life

Attach name plates and interpretation boards to trees, flowers and any plant in the village. The interpretation boards should include detailed description of the plant life and any topics that would attract tourists' attention, such as related historical events, medicinal effects and legends.

(3) Traditional architecture

Conserve the traditional architectural style of Gusii people by specifying colours, building materials, and style. Project organisers should consider the introduction of a building regulation with some incentive measures. A conservation scheme should cover a certain area and new constructions rather than a few specific old buildings. Signboards and newly built tourist facility, such as the observation deck, should also be consistent with the traditional style.

(4) Ritual and festival

Promote tourists' observation, or more preferably, participation in traditional rituals and festivals. For better tourists' appreciation and sympathy with local spectators, brochures and interpretation boards should be provided.

(5) Handicrafts

Arrange workshop visits that are accompanied by an interpretation of its history, production methods, materials, and characteristics as well as experience of production by visitors. These arrangements promote sales of products.

(6) Landscape

Move obstacles that hinder tourists' appreciation of Kisii landscape, if possible. They include electric wires, signboards, and even buildings that don't go with traditional landscape. Garbage and bad smells must be carefully taken away.

(7) Local cuisine

Provide detailed information of local cuisine and its materials, how to eat, recipe, and, if any, its effects to improve health. Opening cooking classes for visitors and dining with local people could be useful to enhance its experience. If necessary, consider some modification of the cuisine to facilitate visitors' acceptance.

(8) Virtuoso

List up and utilise talented persons in special fields, such as soapstone carving, dancing, drumming, cooking, tourist guiding. They could be key figures to enhance the market competitiveness of tourist products discussed in this section.

(9) Experience of production and performance

Provide opportunities for visitors to experience various elements of the Gusii culture and industry, such as production of handicrafts, playing of traditional music, dancing and cooking.

(10) Hiking course

Set hiking courses to enjoy the Kisii landscape. The courses should have signboards, rest facility, lavatories, interpretation boards, and dustbins.

(11) Tourist farm

Develop tourist farms to cater for the needs of urban population to make some agricultural experiences. For international tourists from the North, picking tropical fruits such as bananas would be a quite interesting experience.

(12) Accommodation

Build accommodations with traditional Gusii design, or convert existing houses to tourist accommodation. They should be equipped with modern amenity and cleanliness necessary for international tourists.

(13) Tourist events

Hold an annual event to stimulate visitor arrivals as well as to publicise local products from Kisii. At the initial stage of tourism development, the project organisers should regard the event as prior investment, and it should be recovered in the long-term perspective. The event should aim at entertaining both, tourists and local residents as well. Event attractions should be devised by the project organiser but possible ideas would be:

- Soapstone carving exhibition

- Harvest festival, and

- Theatre play on the Gusii history performed by Gusii amateur actors and actresses.

4.4.3. Implementing the Project

(1) Establishment of a Tourism Organisation

A tourism organisation is the project organiser of the village tourism project in Kisii. Organisation members should consist of those from the Kisii local government, hoteliers, travel agents and operators, chamber of commerce and industry, farmer's organisation, and any existing organisations or groups that could concern tourism. At the initial stage of the project, the local government should take the initiative of the organsation. As the project proceeds, it should be devolved to the organisation itself.

The organisation should be the body to implement the village tourism project as well as the think tank for those who engage in tourism by providing consultation for development.

The tasks of the organisation would be as follows :

- Formulate community level consensus to tourism development

- Publicise the idea of village tourism, and train those who actually tackle the tourism

- Set up overall marketing strategy

- Set up tourism slogans and keywords

- Design project details, including the financial aspect

- Prepare tourism products for tourists

- Publicise tourism products toward the travel trade and potential markets, and

- Provide tourist information for visitors and the travel trade.

(2) Preparation of Tourism Products

Prepare attractive products for tourists to chose from when they stay in Kisii. These should be prepared by the organisation, but some examples are:

- Kisii hill trekking and exploring
- Kisii music concert and music instruments training
- Garden party with Kisii cuisine and local wine
- Visit to a medicine man, and
- Soapstone carving and painting class.

(3) Marketing

The organisation should conduct the following marketing activities:

- Prepare brochures, posters, and sales instruction manuals for the travel trade in Kenya

- Conduct familiarisation trips to Kisii for journalists and the travel trade

- Participate in as many travel events held in Kenya as possible, and

- Install road signs and signboards to show the location of Kisii and its tourism products.

"The Marketing Plan" of this volume discusses marketing activities in general.

CHAPTER 5   TOURISM MANAGEMENT AND PROMOTION PLANS
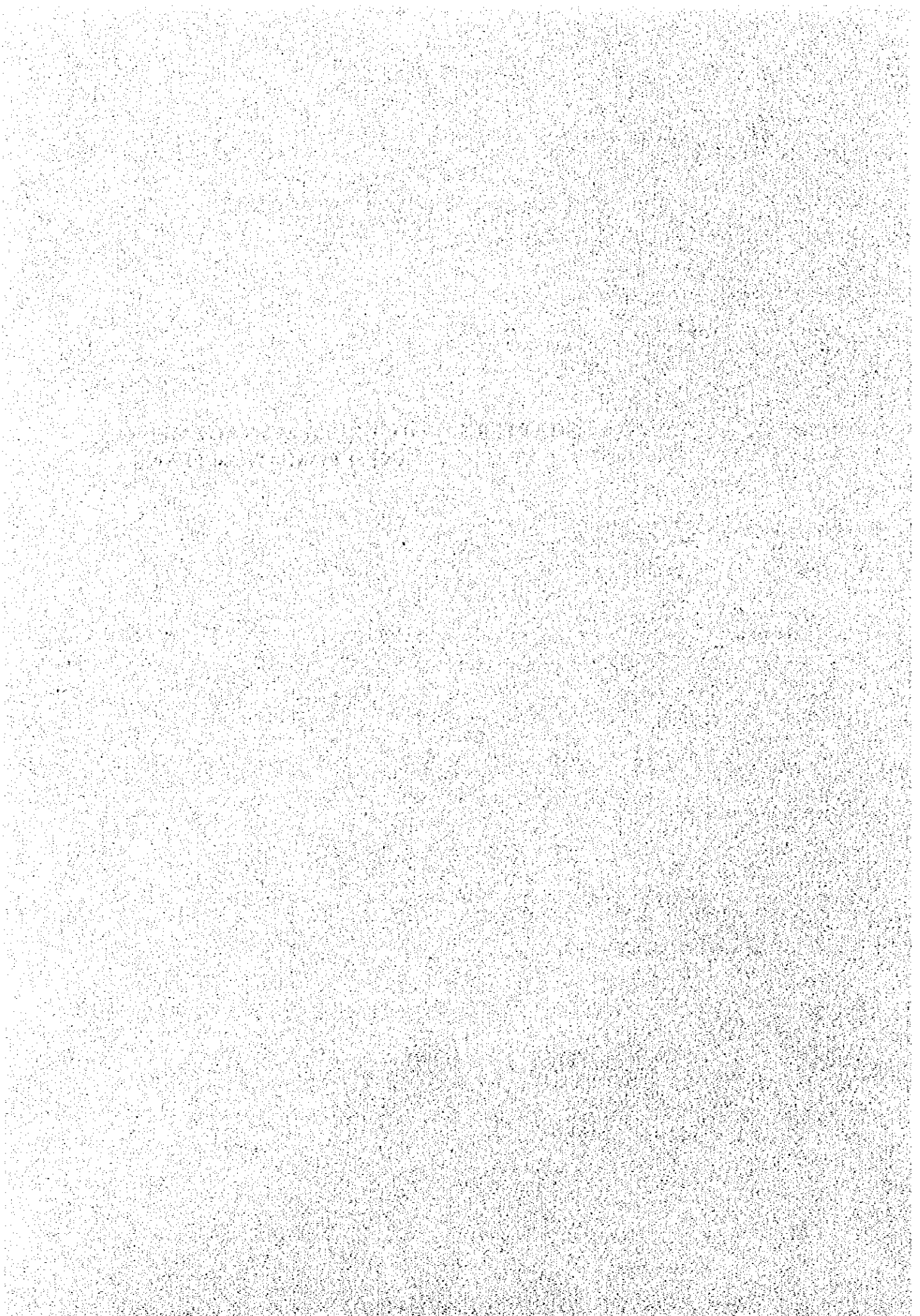
Chapter 5　Tourism Management and Promotion Plans

1.　Tourism Development Administration

1.1.　Issues on Tourism Administration

The private sector is the main player in the tourism sector, and the role of the public sector is to guide the private sector to attain sustainable tourism development. The public sector should control business activities and physical development that could constitute a threat to tourism, although excessive government intervention in the competition among private enterprises should carefully be avoided.

In order to implement the Master Plan and to guide tourism development through appropriate planning, the following issues should be taken into account, which aim at strengthening the tourism administration:

- Close linkage between the public and private sectors
- Co-ordination between tourism development plan and marketing
- Strengthening capacity of training related to the tourism business
- Enhancement of implementation function of area development, and
- Local communities' participation.

1.2.　Policies for Improving Tourism Administration

1.2.1.　Overall Policies

(1) Close Linkage between the Public and Private Sector

Most of the countries that are successful in tourism development have conducted marketing activities by independent bodies funded and operated by the public and the private sectors. It seems obvious for Kenya to choose the same path for her tourism development. Therefore, a system to link MOTW with the private sector must be established.

(2) Strengthening of Research, Planning and Marketing Functions

The existing structure of MOTW should be reviewed so as to improve its capability in tourism research, planning, and marketing. MOTW requires independent bodies dedicated to the functions.

(3) Enhancement of MOTW's Co-ordination Capability with Other Organisations

Since almost every department of the government, local residents, and private enterprises are involved in tourism development, MOTW needs to strengthen its ability to co-ordinate with other ministries and industrial sectors for consistent tourism development.

(4) Improvement of Implementation Function of Area Development

Effective implementation of tourism development plans requires a quick-wheeling implementation body entrusted by the central government with full authority. The body is to take a central role in designating the tourism promotion zones and in co-ordinating with ministries that are responsible for infrastructure development. MOTW undertakes the central role of the co-ordination and KTDC performs as the actual development implementation body under MOTW.

(5) Local Communities' Involvement

Promotion of local communities' involvement in tourism planning is a key to mitigate conflicts arising from tourism development. An organisation comprising local residents and local government would mediate between the tourism development authority and the local community.

1.2.2. Structure of Tourism Development Administration

MOTW is responsible for formulating tourism policy and co-ordinating with related ministries for implementing tourism development.

The Tourist Board is a body to implement marketing activities, and to assist MOTW to formulate tourism related policies and plans. KTDC implements tourism promotion zones (TPZ) development. A systematic diagram of the proposed tourism development administration is illustrated in Figure 5. 1.

Figure 5. 1   Proposed Structure of Tourism Administration

☐ Existing Organisation   ▨ Proposed Organisation (including re-structuring)
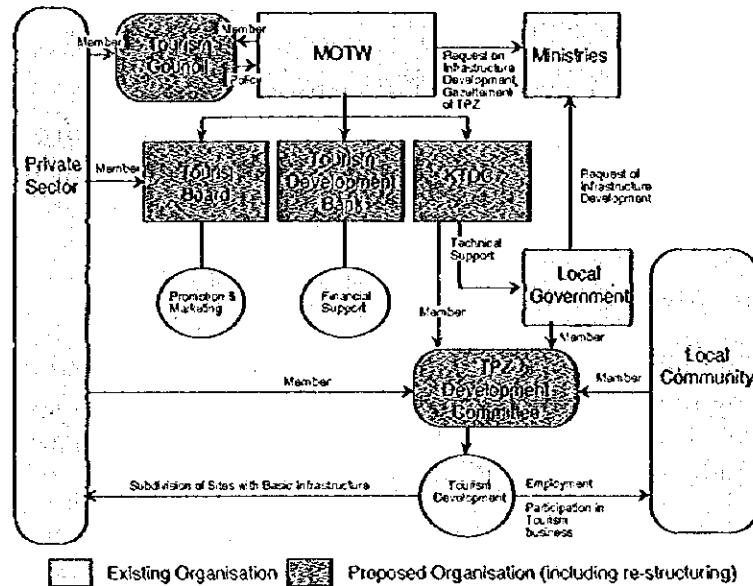
Source: JICA Study Team

1.3. Organisation Improvement Plans

1.3.1. Tourist Board

(1) Basic Function

The Tourist Board is a semi-autonomous body that is responsible for the national and international marketing activities for Kenyan tourism, detaching the role from MOTW. The board should be a public - private sector co-operation, but the private sector should have the initiative in conducting marketing activities, as MOTW currently lacks sufficient expertise in this field.

The board should also have a function as an advisory body for MOTW covering the following aspects:

- Advise on general tourism policies

- Appraisal of the performance of MOTW's tourism development plans, and

- Consultation on specific issues of tourism policies and planning, on request by MOTW.

(2) Management of the Board

a. Management

The board consists of staff from both, the pubic and private sectors. The board should be semi-autonomous and funded and operated by both, the public and private sectors. Overseas tourist offices are transferred to this organisation, as their primary tasks are to market Kenyan tourism.

b. Members

The majority of the staff should be from the private sector to provide the marketing know-how to the board, and a few staff members from MOTW are tasked to intermediate and co-ordinate with the travel trade, MOTW and other government agencies.

The board should be operated on basis of a membership system. Members of the board are not only from tour operators and hoteliers, but also any beneficiaries of tourism. This may include:

- Airlines companies
- Kenyan Railway (KR)
- Transportation companies
- Souvenir manufacturers, distributors, and sellers
- Tourist oriented restaurants, and
- Local tourism organisations (details will be discussed later).

c. Operating Cost

The board should be operated with a budget allocated from MOTW, membership fees from the board's members, and consulting fees from tourism enterprises, local goverments, and tourism organisations.

(3) Overseas Tourist Offices

Functions and Roles

Overseas Tourist Offices are responsible for collecting information on source markets as well as implementing marketing activities, directed by the Tourist Board.

<u>Management</u>

Overseas Tourist Offices should be transferred to the Tourist Board. To minimise the operating cost and to improve efficiency of marketing activities, tourist officers should partly be replaced by local marketing representatives.

<u>Appointment of Overseas Marketing Representatives</u>

The board should appoint marketing representatives in major tourist generating countries and have them conduct marketing activities. Marketing activities depend largely on the local sociocultural context and they differ considerably in detail form country to country. The representatives should be natives of the countries as they know their own market better than foreigners.

<u>Enforcement of Overseas Marketing Function</u>

Tourist offices that cover the Asia and Pacific Region should be strengthened. Appointment of local marketing representatives in Japan and Australia is strongly recommended to tap the market opportunities in the area. The representative appointed in Japan is to cover other East Asian countries such as Korea, Taiwan, and Hongkong.

1.3.2. MOTW

(1) Overall Structure of MOTW

MOTW has presently two functions, namely that of tourism administration and fishery administration. The ministry has three departments, namely Department of Tourism, Department of Administration, and Department of Fishery. In order to strengthen the ministry's functions and tourism administration, MOTW should be re-organised along the following lines:

- The Planning Unit should be strengthened with a view to upgrade its planing and research functions, and

- The Department of Tourism should be re-organised with a view to upgrade the licensing and supervising function in the department.

(2) Tourism Administration of MOTW

a. Basic Function

MOTW should strengthen the following functions to empower the tourism administration:

- Planning and co-ordination

- Data collection and analysis including periodical visitor surveys to supplement statistics, and

- Policy making through co-ordinating with related ministries.

b. Proposed Organisation for Tourism Administration of MOTW

MOTW should be re-organised so as to strengthen the above mentioned functions. Figure 5. 2 shows the proposed new organisation of MOTW.

The Present Tourism Department should be sub-divided into the Tourism Support Department and the Administration and Professional Service Department. The Planning Unit of the Administration Department should be independent to establish the Planing and Research Department.

Figure 5. 2   Proposed Organisation Chart of MOTW
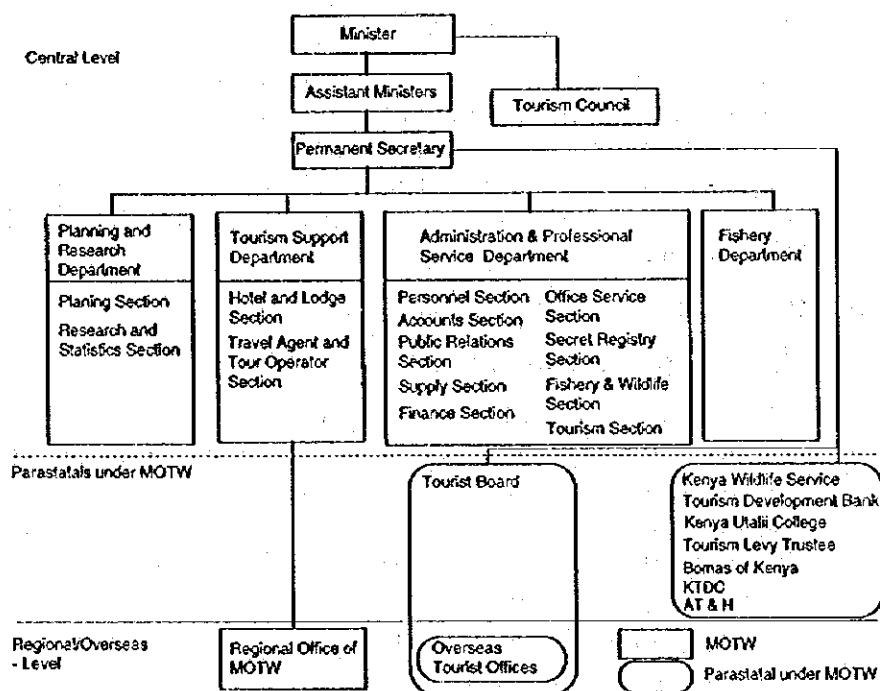
Source: JICA Study Team

(3) Functions and Roles, Sectional Organisation in the Department

a. Research and Planning Department

Functions and Roles

The Research and Planning Department is responsible for all planning, data collection, market research, co-ordinating functions in MOTW. The department should be established based on the existing planning section. The department should cover the following tasks:

- Drafting of tourism development policy
- Formulating of tourism development plans
- Approving of tourism promotion zone development plans
- Collecting and analysing tourism related data
- Publishing tourism statistical reports
- Conducting researches related to tourism, and
- Coordinating of related ministries for tourism development.

Proposed Sections in the Department

In order to realise the above functions and roles, the existing planning unit should be reorganised into the following sections:

- Planning Section, and
- Research and Statistics Section.

b. Tourist Support Department

Functions and Roles

The Tourist Support Department shall be responsible for supervising and controlling tourism business and supporting tourists by maintaining a fair business environment as well as protecting against unfair, disordered tourism business. The department is formed based on the existing Licensing Section in the Tourism Department. The department should cover the following tasks:

- Licensing of tourism business
- Supervising tourism related private firms
- Protecting tourists from unfair business practices
- Drafting facilities' standards and criteria of the star system
- Representing MOTW at regional level, and
- Providing visitors with tourist information at local level.

Sections in the Department

To realise the proposed functions and roles as stated above, the current licensing section should be restructured into the following sections:

- Hotel and Lodge Section
- Travel Agent and Tour Operator Section, and
- Regional Tourism Offices.

c. **Regional Tourism Office**

At present, MOTW does not collect sufficient local tourist information for the travel trade and the visitors to Kenya as well. MOTW should establish Regional Tourism Offices in every province to conduct the following tasks :

- Collect information on tourism resources, products and local travel conditions

- Collect information on visitors and their needs

- Provide tourist information for visitors, and

- Implement the tourism administration such as licensing at the local level.

Existing Tourist Information Centres in Mombasa and Malindi should be transferred to Regional Tourism Offices. New Tourist Information Centres should be established under Regional Tourism Offices, or alternatively under local government or local tourism organisations, to provide visitors with tourist information such as accommodation, transportation, and tourist attractions.

d. **Administration Department**

The Planing Section should be separated from the department to establish the Research and Planning Department.

e. **Fishery Department**

The present fishery department is not subject to change.

1.3.3. KTDC

KTDC has originally been established as an authority to implement area development for tourism, which aims at providing hotel sites with utilities in accordance with site development plans. To control environmental impact as well as to develop new tourism promotion zones, KTDC must strengthen the function to implement tourism development, and that of financial assistance to small and medium tourism enterprises. To strengthen and improve efficiency of management, it is proposed that KTDC should be transformed into two organisations with the following roles:

- Tourism Development Bank for assisting the private sector by providing financial assistance and loans and providing technical assistance, and

- Kenya Tourism Development Cooperation for undertaking the development of the tourism promotion zones and sell/lease it to the private sector.

1.3.4. Local Participation

(1) Local Governments' Participation in Tourism

a. General Policy

Although contributing to the local economy is an objective of tourism development, it is sometimes difficult to achieve consensus on the development as local communities' opinions are not properly reflected in the planning process. Therefore a system should be devised that facilitates local government and community to participate in the planning and development process. The following problems should be solved to realise such participation:

- A tourism administration section does not exist in the local government

- MOTW does not have a local office, which makes it difficult to reflect local opinion in the tourism administration

- Benefits from tourism for the local government are very limited, and

- There exists no authorised system to exchange opinions with the local community on tourism development.

The following policies are proposed to establish such a system.

- The tourism administration at the local level should be strengthened. Local government should have a tourism section/unit or an existing section should be partly put in charge of tourism, and

- An authorised system should be formulated for developing the proposed Tourism Promotion Zone. For this end, the TPZ development committee is proposed.

b. Tourism Section/Unit at Provincial Level

District headquarters should have a tourism section or tourism unit, which is responsible for tourism matters in the district. The roles of the tourism section are enumerated as follows :

- Co-ordination between the local community and KTDC and investors, and

- Coordination with concerned ministries to be smoothly provided with the necessary infrastructure for tourism development.

Since the local government does not have sufficient expertise in tourism, MOTW should second task officers to the section. This would also contribute to establish a smooth linkage between MOTW and the local government.
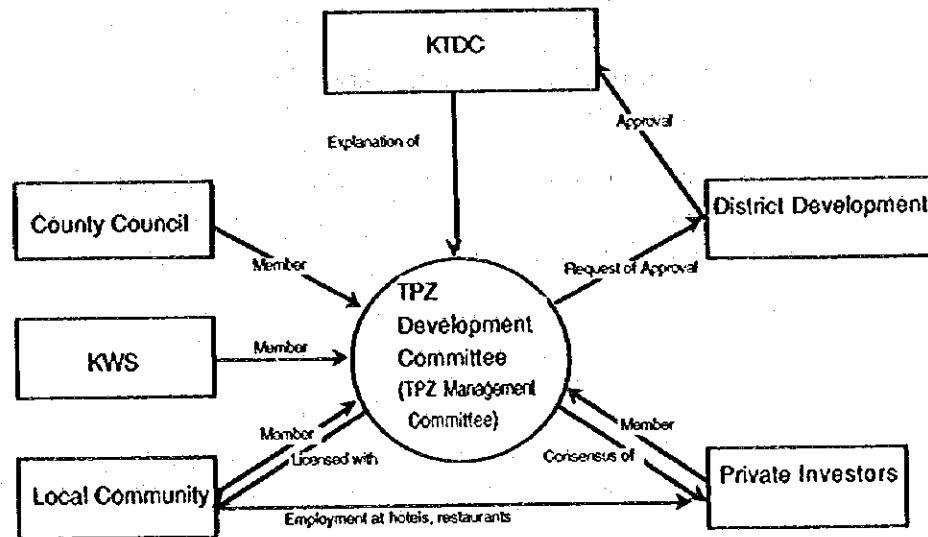
(2) TPZ Development Committee

a. Basic Functions

The basic function of the TPZ development committee shall be to provide a formal opportunity for the local government, local community/residents and local entrepreneurs to discuss about TPZ development projects.

b. Organisation

To develop the tourism promotion zone, KTDC organises the tourism promotion zone development committee, which is formed by the representatives of local community, local government and entrepreneurs, who are interested in investing in the zone. The structure of the organisation is shown in Figure 5. 3.

Figure 5. 3   Organisation of TPZ Development Committee

Source: JICA Study Team

c. Participants in TPZ Development Committee

<u>KTDC</u>

KTDC is the organiser of the committee. KTDC is responsible for site planning, co-ordination with related ministries and MOTW. It formulates a TPZ development plan and presents it to the committee.

<u>Authority at local level</u>

The local government consists of two authorities, namely the County Council and District Headquarters. The County Council is an autonomous authority which represents local residents, while the District Headquarters represents several ministries in the district. Accordingly, both authorities should participate in the committee for easier consensus with the local residents, and better co-ordination for giving priority to infrastructure development in the TPZ.

<u>Private investors</u>

The TPZ development plan should reflect private investors' needs to promote investment. The plan should secure certain sites for local SMEs.

<u>Local residents</u>

The biggest difficulty, which development plans generally face, is to obtain a consensus from local residents. The committee should

provide opportunities for local residents to participate in the planning process to facilitate consensus building.

d. Transformation of TPZ Development Committees to Local Tourism Organisations

After completion of the envisaged development, the TPZ development committee transforms into a local tourism organisation, gradually transferring the initiative to the local private sector.

(3) Local Tourism Organisations

a. Basic Function

A local tourism organisation is a planning, co-ordination and marketing body based on a local community. The organisation is tasked as follows:

- To formulate and implement development and marketing plans for the area

- To compile opinions and requests from its members, and lobby for their realisation

- To supervise and encourage private enterprises' activities to be consistent with the plans and policies

- To give financial support to local tourism SMEs by provinding security when they need financing, and by giving consultation on tourism development

- To collect local tourist information and provide them for the visitors through local tourist information centres, and for MOTW and the Tourist Board,

- To publicise the importance of, and appropriate ways to cope with, tourism to local people, and

- Local tourism organisations in Mombasa and Nairobi should tackle convention tourism by establishing a local convention bureau or a section in the organisation responsible for promoting the market segment.

The styles of the organisations should vary depending on the level of tourism development in respective communities and areas. In an area where tourism is at a very initial stage, the local tourism organisation could be a section in a provincial government. As tourism develops, the section moves down to a district, location, or even sub-location level. The initiative of the organisations should also shift from the public to the private sector.

MOTW and the Tourist Board should encourage and support the establishment of local tourism organisations, in order to promote local communities' participation in tourism.

b. Preventing the Killing of the Goose That Lay Golden Eggs

The Airport Questionnaire Survey revealed that the visitors to Kenya regard "beach boys" as the most irritating problem. (Annex 1 of Volume 4 refers). The problem, however, comes from an inappropriate strategy for the local communities' participation in tourism, and improvement of the strategy will benefit both tourists and local people. The following actions should be taken by the organisations to solve the problem:

- Make intensive publicity toward local people on the importance of tourism, and how they could make tourists happy and come to visit Kenya again

- Set appropriate guidelines for individual guides and vendors when they approach tourists. This should stress the prohibition of coercive selling

- Introduce a licensing system for individual guides and vendors to control their activities. Keeping the above mentioned guidelines should be the prerequisite for giving the license, and

- Give consultations to them to run other types of tourism enterprises that are more profitable and respectable.

Local tourism organisations are the most appropriate for solving the problem as local guides and vendors would be better controlled by local people themselves than MOTW.

1.4. Legislative Arrangement to Empower Tourism Policy

1.4.1. Tourism Related Laws and Regulations

(1) Tourism Law

To back up the project and measures proposed in the Master Plan and to ensure their implementation, it is necessary to establish a wide framework of legal controls. In Kenya there exist several Acts and regulations on tourism business and conservation of wildlife such as Tourist Industry Licensing Act, Hotel and Restaurant Act, KTDC Act and Wildlife Conservation and Management Act. Tourism policies and planning, however, have no legislative background. In order to co-ordinate tourism development policies among several ministries and periodically provide tourism development plans with adequate

data collection and analysis, a Tourism Law should be established. The law should contain the following items:

- Declaration of the tourism sector as an activity carried out in the public interest, showing the government's commitment to development

- Clarification that MOTW take initiative in the overall tourism development policy and tourism development administration

- Responsibility of MOTW to formulate a tourism master plan based on the tourism development policy, to regularly revise the plan (for example every 3 years), under the authorisation of the minister

- Specification of the items to be considered in a Master Plan

- Obligation of MOTW to monitor and make reports

- Requirement of MOTW to support the protection of tourism resources, and

- Formulation of a code of ethics for the various parties involved in the tourism sector.

(2) Resources Conservation Act

In general, tourism resources can be divided into 2 types, namely natural tourism resources including wildlife, and cultural and historical tourism resources. As for the natural resources, the Wildlife Conservation and Management Act is available. Important cultural and historical sites and buildings are also gazetted under the Antiquities and Monuments Act. Under these acts, KWS and the National Museum are responsible for managing the resources, respectively. As some of the resources could be tourism objectives, which bring economic benefits, the tourism view point should be more emphasised in choosing resources for gazetting. In this sense, the study team recommends that MOTW should participate in the authorised system in the field of resource conservation and administration.

(3) Others

To properly implement tourism development, the following legislative arrangements are proposed:

a. Designation of Tourism Promotion Zone

Tourism Promotion Zones are proposed to guide tourism investment to designated areas. Relisation of the concept of tourism promotion zone by providing incentives requires legislative authority to control land use. A land use law should be established with an article to

gazette, among other things, the tourism promotion zone. There is no legislative requirement for gazetting TPZs at present.

b. Ordinance of Building Code in TPZ and Tourism Zone

Building regulations should be set-up more flexibly in accordance with location and type of development. For the tourism promotion zone and tourism zone, the ordinance should be prepared by the local government in consultation with MOTW and based on the existing building code. The minimum lot size, floor-area ratio, set-back, height and so on of tourism facilities as well as necessary incidentals should be regulated by the ordinance with a view to maintain the local atmosphere and to guarantee their beautification.

c. Licensing

Licensing and registration for tourists accommodations are subject to many complaints from the private sector. A reasonable complaint refers to the efficiency of the procedure. Hence, it is recommended to streamline the licensing requirements. For this end, a further examination and discussion with the private sector must be undertaken.

On the other hand, low-budget lodges, tented safari, private ranches as well as pensions, villas as well as home stays, are out of MOTW's control at present. Accordingly, registration should be properly enforced.

Finally, standard of, and permission for, tourism businesses should be more reinforced in order to control illegal tourism business.

1.4.2. Incentive Scheme

(1) Necessity for Providing Incentives

The investment environment in Kenya has been improved to a great extent under the economic liberalisation policies. The incentives, however, have been tailored only to provide financial support for the development of specific facilities, which constitute a part of the tourism industry. In accordance with varying requirements of tourists, a variety and sophistication of tourist facilities will be increasingly important, such as special restaurants, amusement parks, sport facilities, and well-equipped or specially equipped coaches and buses. These tourist facilities along with basic infrastructure are developed only with a considerable investment at the initial stage and they require a long period before bearing any profit. The present system of investment incentives, therefore, needs to be upgraded in this light.

It is advisable that the government provide various forms of incentives, which are more suitable to encourage tourism related investment covering both, accommodation and non-accommodation projects especially in TPZ. Economic incentives and other incentives are important to investors.

On the other hand, the existing system does not allow most local governments to obtain direct revenues from tourism in the form of taxes, fees and/or subsidies, except for a paltry sum of revenues, such as garbage charges collected from hotels as well as other minor by-products. This discourages the local government from having a positive attitude toward tourism development. A system and related measures that motivate the local government to participate in tourism needs to be established.

In conclusion, the following incentives should be taken into account as a proposed incentive scheme:

- Economic incentives for promoting tourism investment

- Incentives for guiding investment into the tourism promotion zone, and

- Incentives for more involving the local government in tourism development.

(2) Proposed Incentives

a. Economic Incentives for Promoting Tourism Investment

Possible alternatives of economic incentives are listed below. However, they need to be further looked at with a view to balance them with those for other industries:

- Expansion of the type of facility eligible for investment allowance

- Introduction of tax holidays or deferrals for the initial investment

- Extension of the incentive period of two years to five years for tax reduction

- Reduction of VAT for machinery and equipment for all tourism industries

- Provision of non-refundable grants, loans without interest or with low-interest to small and medium size enterprises for the building and rehabilitation of their facilities, and

- Consolidation or reduction at least of the number of tourism related taxes and levies.

b. Economic Incentives for Guiding Investment into the Tourism Promotion Zone

To guide the tourism investment in accordance with the tourism development plan, especially into the tourism promotion zones, location differences in the degree of the economic incentives are proposed. In addition to the economic incentives, the following incentives are proposed :

- Provision of infrastructure in the tourism promotion zone

- Co-ordination of a packaged administrative procedure to obtain permission from the various ministries, and

- Preferential building code to be made available.

c. Incentives for More Involvement of the Local Government in Tourism Development

To encourage more involvement of local government in tourism, the following measures that motivate local governments to participate in tourism are proposed to be introduced:

- Provision of a certain portion of the proposed tourism levy to the local governments, and

- Special financial support to implement infrastructure development related to tourism.

These measures should be implemented from a long term point of view with more detailed examinations.

(3) Obligation for Economic Incentives

Private investors, which receive incentives should be obliged to contribute economically to the local community. For this end, the following should be included in the conditions to receive the incentives:

- Employment of a minimum proportion of staff from the area, and

- Support local people to start tourism businesses, such as souvenir shops, restaurants and tour guides.

1.5. Other Recommendations

1.5.1. Security and Safety of Tourists

(1) Tourist Security

MOTW should establish a system that guarantees safe and secure travel for tourists, in order to create a positive image of Kenya as a safe tourist destination. The following measures are recommended to improve tourists' security :

- Establishment of 24 hours emergency telephone service for tourists in the proposed Tourism Information Centres

- Beach operators and the like should be controlled by local tourism organisations. They should be organised and trained as local vendors, tour guides or tour operators

- Establishment of a Tourist Police Unit, and

- Establishment of small police boxes in the TPZ and at the beaches (Japanese "koban" or local police box is suggestive).

Although the last recommendation is out of MOTW's jurisdiction, efforts should be made to realise it through inter-ministry co-ordination.

(2) Tourist Safety

One of the critical concerns in Kenya is traffic safety. Traffic accidents are caused by inadequate car maintenance, inadequate road surface as well as human error. These three problems should be improved to lessen the traffic accidents in Kenya. Generally speaking, the so called "3 E" approach should be taken into account, which is:

- Engineering
- Education, and
- Enforcement.

Since drastic countermeasures need large investment and many changes in related legislation under the broader subject of a future traffic management policy, implementation would take a long time. Accordingly, the following measures are recommended from a short term point of view:

- Reinforcement of controlling car speed on trunk roads

- Implementation of road rehabilitation projects especially of the trunk roads, and

- Introduction of a tour drivers' moral improvement seminar (one day) by the Police and MOTW through KATO.

1.5.2. Securing Source of Budget for Tourism Promotion

(1) Basic Policy

a. Reform of Training Levy to Tourism Levy

The budget of MOTW is available for funding the tourism administration. The training levy is available for educating personnel, who engage in tourism related occupations. This is based on the beneficiaries-pay principle as international tourists require special services. It must, however, be considered that tourists require not only services in hotels and restaurants but infrastructure, nature conservation and co-ordination with local communities to realise tourism development. In this sence, the study team proposes that the existing training levy be reformed into a Tourism Levy.

b. Rate of Tourism Levy

The rate of the levy must not be increased drastically, in order to keep a competitive level with other countries such as Tanzania, Zambia and South Africa. The increased number of tourists in future will expand the total amount received under the levy.

c. Allocation of the Tourism Levy

The tourism levy should not only be used for Utalii College, but also for providing funding to the Institute of Technology offering training in tourism related courses. For the long term perspective, local governments are a candidate to share the revenue for local tourism development.

(2) Necessary Action

- The training levy is collected under the Hotels and Restaurants Act (Cap. 494). The act stipulates the purpose of use of the collected training levy by the Catering Levy Trustee. It is necessary to modify the act

- A special account should be created for local governments. The special account should be strictly limited to be used as a budget for only tourism related projects, and

- The base of the tourism facilities, from which the tourism levy needs to be collected, should be broadened.

1.5.3. Actions to be Taken by Other Organisations

a. New License for Catering/Food Preparation (Ministry of Health)

To provide an opportunity that catering, food preparation and cooking people have motivation to improve their own techniques and knowledge, a cooking license system should be introduced. The license would certify that the cook has not only adequate cooking technique, but also satisfactory knowledge of sanitation, nutrition and food preparation. The Ministry of Health would be responsible for this matter.

b. Environmental Training (KWS)

KWS should provide its environmental education and management courses for a wider range of people. Its training facilities in Voi and Naivasha should be enhanced and opened on a commercial basis to train tour guides, naturalists, hoteliers and drivers for the Kenyan travel enterprises, and even for tourists as a new tourism product.

c. Human Resources Development at the Local Level (Ministry of Research, Technical Training and Technology)

The technical training institutes should open certain courses to train personnel for local tourism business, such as food production and service course. These courses aim at training middle management, regular staff and supervisor levels.

d. Conservation of Historical and Cultural Assets (Ministry of Culture and Social Service)

The national museum should identify all assets to be gazetted as national monuments. MOTW should co-operate in the identification of such assets from the tourism point of view.

2. Tourist Information System Development

Images of "tourist information system" differ considerably depending on the people under different situations. The following systems are all regarded as tourist information systems:

- Computerised reservation system for transportation, hotels and travel agencies/tour operators

- Database that store tourism market information such as tourist statistics and survey data

- Database that store tourist information such as tourism objectives, transportation and tourism related services

- System to provide on-site information for tourists such as guide signs and interpretation boards

The first type of information systems has been developed by tourism related enterprises. Although the needs to enhance the first system exist in Kenya, it would be the private sector's role to develop the system. Therefore, this section discusses the rest of the tourist information systems.

2.1. Tourist Information and Data Management

The tourist information system should be established to provide necessary information for tourists, the travel trade and the tourism administration.

2.1.1. Information Needs

(1) Tourism Administration Level

They require tourist information for formulating tourism policies, managing tourism enterprises, planning tourism development projects, and conducting marketing activities.

(2) Travel Trade Level

They require tourism market information in Kenya as well as in source markets. Information on potential tourism resources are also important for them to plan their products. They need up-dated information for quick responses to market trends.

(3) Tourist Level

They need the information on tourism objectives and travel conditions such as accommodation, transportation, food and shopping. They also need on-site information that guide them to reach tourism objectives, and provide them with the interpretation of the objectives.

2.1.2. Type of Information to Be Provided

(1) Market Information

Statistical information are provided by government agencies, semi-governmental or private organisations. Periodical tourist surveys, however, should be carried out to cover items that are not available in existing statistics such as expenditure pattern, travel itineraries and market competition.

(2) Travel Information

Travel information should cover the following items:

- Tourism attractions at the tourism spots and areas
- Accessibility and transportation conditions
- Available accommodation facilities
- Restaurants and specialities of foods, and
- Shopping information.

2.1.3. Form of Information Supply

(1) Statistical Report

MOTW should be responsible for providing a statistical report on tourism. Although the Kenyan government publishes general statistical reports annually, some of the data need to be provided by MOTW for the travel trade and tourism related organisations on a monthly basis. The information proposed to be included in the report is listed in Table 5. 1.

Table 5. 1   Contents of Statistical Report

Item No.	Contents of Statistical Report	New Item	Monthly Report
1	**INTERNATIONAL TOURIST ARRIVALS**		
1.1.	International Tourist Arrivals by Country of Residence		X
1.2.	International Tourist Arrivals by Country of Nationality		
1.3.	International Tourist Arrivals by Mode of Transport		
1.4.	International Tourist Arrivals by Month of Arrival		X
1.5.	Average Length of Stay of International Tourist		
1.6.	Tourist Bednights of International Tourist		
1.7.	Profile of International Tourist	X	
1.8.	International Tourist Arrivals by Last Place of Call Before Arrival	X	
2	**AIR TRAFFIC**		
2.1.	International Tourist Arrivals by Nationality at International Airports	X	
2.2.	International Non-scheduled Flights at Int'l Airports by Country of Origin	X	
2.3.	Incoming International Scheduled Flights at International Airports	X	
3	**OUT-GOING KENYAN TRAVELLERS**		
3.1.	Out-going Kenyans and Kenya residents		
3.2.	Out-going Kenyans and Kenya residents by Month of Departure		X
3.3.	Out-going Kenya residents by Month of Departure and Mode of Transport		
4	**TOURIST EXPENDITURE**		
4.1.	Revenue from International Tourism	X	
4.2.	Distribution of Tourism Consumption Expenditure	X	
4.3.	Distribution of Tourism Revenue	X	
4.4.	Balance of International Tourism Trade		
5	**ACCOMMODATION ESTABLISHMENTS**		
5.1.	Number of Accommodation Establishments and Rooms in Kenya	X	
5.1.	Number of Accommodation Establishments and Rooms in Major Tourism Areas	X	
5.3.	General Data of Accommodation Establishments in Major Tourism Areas		
5.4.	Occupancy of Accommodation Establishments in Major Tourism Areas		
5.6.	Number of Visitor Arrivals to Major Tourism Areas/ Destinations		

Note: *(1) Profile includes Purpose of visit, age, sex, occupation and type of accommodation to be used.
*(2) General data include average occupancy rate, number of visitor arrival and average length of stay.
Source: JICA Study Team

(2) Brochures and maps

There are two types of tourist information to be provided for tourists. One is to motivate potential tourists to visit a destination and another is to give practical know-how to explore the destination for those, who are already motivated. Their differences are summarised in Table 5. 2.

Table 5. 2   Comparison of Motivation and Know-how Brochures

	Motivation brochure	Know-how brochure
Purpose	Motivate potential tourists to visit a destination	Give actual tourists know-how to travel a destination
Provision sites	Potential market side Gateway city Overseas and Central tourist offices	Destination Gateway city Regional tourist office Hotels
Type of information given	Favorable image of a destination Color-photos Videos	Know-how to travel (public transportation, accommodation, restaurant) Accurate map
Others	Market matching materials	Priority of availability over quality and visual presentation

Source: JICA Study Team

To publicise the attractiveness of a country or a destination to create awareness in potential markets are the principal functions of the motivation brochure. Therefore, producing this type of brochure is the role of the organisations responsible for marketing activities.

The know-how brochure aims at providing tourist information in the real sense, therefore it should include the following information:

- How to reach major tourism objectives in a area

- How to arrange local transportation, such as Matatu, bus, taxi and boat. This should include guidelines for appropriate prices for hire

- List of local products, shops selling local products, and work-shops/factories open for tourists, and

- List of accommodations and other tourism-related services that include contact address, price, number of rooms, transportation and any features of the respective establishments.

Town maps intend to supplement know-how brochures. A town map should include accurate locations of anything that is considered to be useful for visitors. That would be shops, public markets, restaurants, tourist objectives, sports facilities, entertainment, bus stops, hospitals and government buildings.

Know-how brochures and town maps are more important at the destination side than the market side. Therefore, they should be available at local hotels, proposed tourist information centres, airports, and bus terminals in Kenya.

(3) Data Compilation Service

Proposed tourist survey data could be useful for tourism related organisations and enterprises that concentrate in specific market segments, if they are tabulated for specific purposes. For example, a local convention bureau may require the data on visitor profiles of convention attendants, and a travel agent specilised in selling tented safaris may need the data on that market segment.

MOTW should provide the service to compile and tabulate the survey data for the organisations and the enterprises upon request for a reasonable fee.

2.1.4. Composition of Information System and Source of Information

(1) Composition of Information System

The relationships of organisations involved and expected out-puts are illustrated as shown in the following figure. At the national level, the Research and Statistics Section of the Research and Planning Department in MOTW will be responsible for data processing and information distribution.

Figure 5. 4   Information System
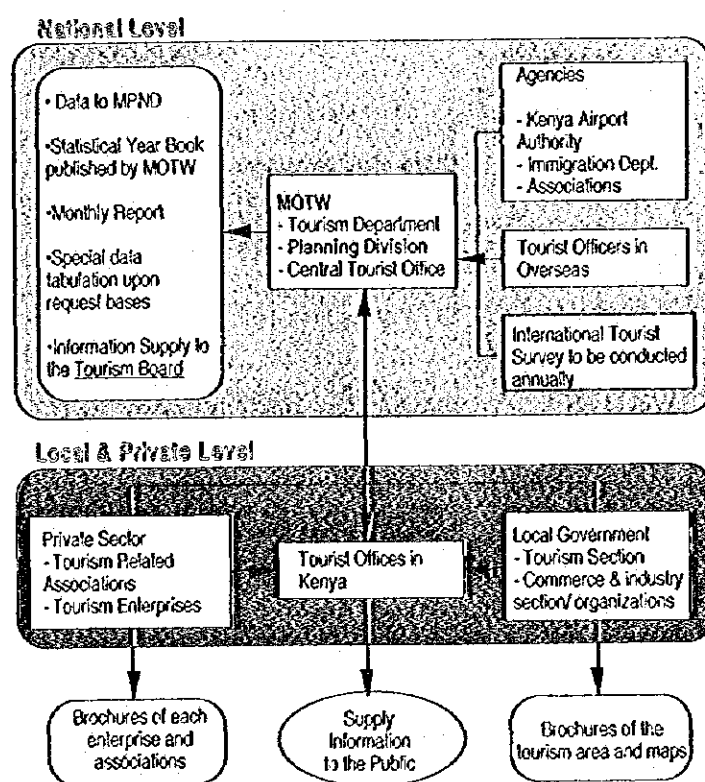
Source: JICA Study Team

At the local level the tourism sections in the local government or in the chamber of commerce and industry, which are proposed in this Master Plan, are responsible to collect data and information. The local information will be sent to the Research and Statistics Section through regional tourists' offices.

Local governments, MOTW regional offices and local tourism organisations should set up Tourist Information Centres in major tourist areas, airports, transportation terminals and wayside facilities areas to provide tourist information for their visitors. They should distribute brochures produced by local private enterprises through the centres.

(2) Source of Information

The sources of information in various categories are summarised as follows.

a. Statistical Information

Sources of information for statistics are as follows.

Table 5. 3   Source of Information for Statistical Data

Item No.	Contents in Statistical Report	Source of Information
1	INTERNATIONAL TOURIST ARRIVALS	• Tourist statistics are collected from disembarkation cards (E/D cards) of the Immigration department, Office of the President. • Tourist profiles will be calculated from random sampling of cards.
2	AIR TRAFFIC	• Air Traffic data will be supplied by the Kenya Airport Office of the President.
3	OUT-GOING KENYAN TRAVELLERS	• Kenyan tourist statistics are collected from disembarkation cards (E/D cards) of the Immigration department, Office of the President.
4	TOURIST EXPENDITURE	• Average expenditure per person per day should be made by conducting the International Tourist Survey at the International Airports. Face to face interviews should be employed.
5	ACCOMMODATION ESTABLISHMENTS	• Number of non-resistered rooms and domestic tourists will collected by sampling survey in the District. • Number of registered rooms will be collected from local government, private sectores' organization and Tourism department in MOTW.

Source: JICA Study Team

b. Tourism Products Information

Large parts of the tourist products information are usually generated by tourism related private enterprises or organisations, which are directly related to the promotion of the tourist products, such as tour operators, tour agents, restaurants, hoteliers and so no.

National, regional or aerial tourist related information, such as tourists guide maps, directories of tourist attractions, transportation and access guide should be made available by the local government or the private organisation of the tourist related industries. Tourism sections or units to handle this information flow should be established.

c. Information in Tourist Generating Countries

Up-dated tourist related information in the source markets is quite important not only for sales planning of the private sector, but also for tourism policy planning by the national and local tourism administration.

Since overseas tourist offices are proposed to be tranfered to the Tourist Board, the board should be responsible to deliver the information to Kenya. It should publish a monthly newsletters that contain overseas market information for its member organisations.

2.1.5. Required Action

Figure 5. 5 illustrates the roles and relationship among various organisations to establish the information system described in the pervious sections.

Figure 5. 5   Role of Related Agencies/ Organisations
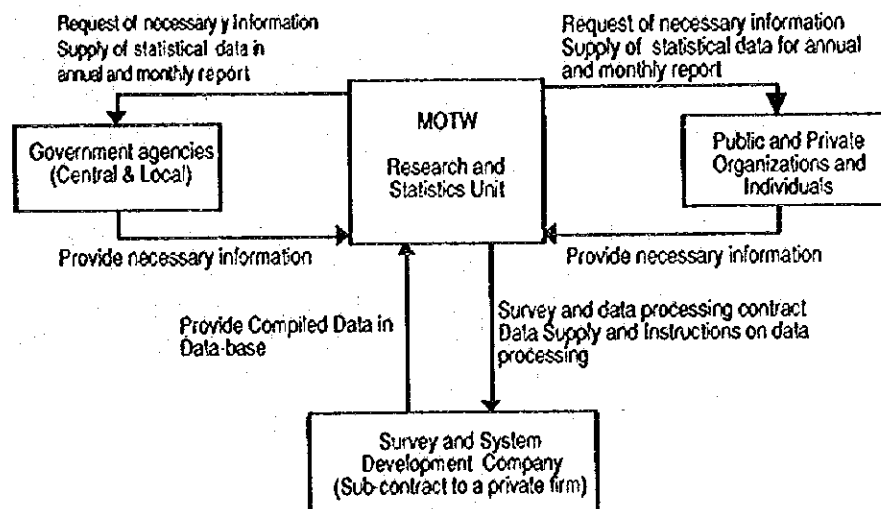
Source: JICA Study Team

(1) National Level

- Set up Research and Statistics Section in the proposed Tourism Research and Marketing Department in MOTW, and

- Budget allocation for information collection and its processing system and preparation of work procedure.

(2) Local Level

- Set up tourism related sections or units at the District's office level and appoint personnel responsible for tourist information matters, and

- Promote to set up local tourism organisations, otherwise encourage the local chamber of commerce to have a tourism section that has similar functions as the local tourism organisations.

(3) Travel Trade Level

- Set-up responsible section or unit in charge of tourist information in the tourism related organisations and the proposed Tourist Board.

2.1.6. Integration of Information System in the Future

At the first stage, MOTW should set-up a collection and supply system for tourism related information and data that meets the tourism sector's requirement.

At the second stage, MOTW should achieve reliable and accurate data collection, data compilation and maintenance of smooth information flow.

At the final stage, MOTW should integrate the information system using a nation -wide computer network. The system does not only include statistical data, but also travel information in the form of the GIS (geographical information system) database through the network. This requires the establishment of a tourist data and information centre.

The information stored in the system should be not only for the tourism related organisations in Kenya, but for the general public in the world as an advertisement of Kenyan tourism. This would be done by connecting the system to a global computer network, or more specifically, Internet.
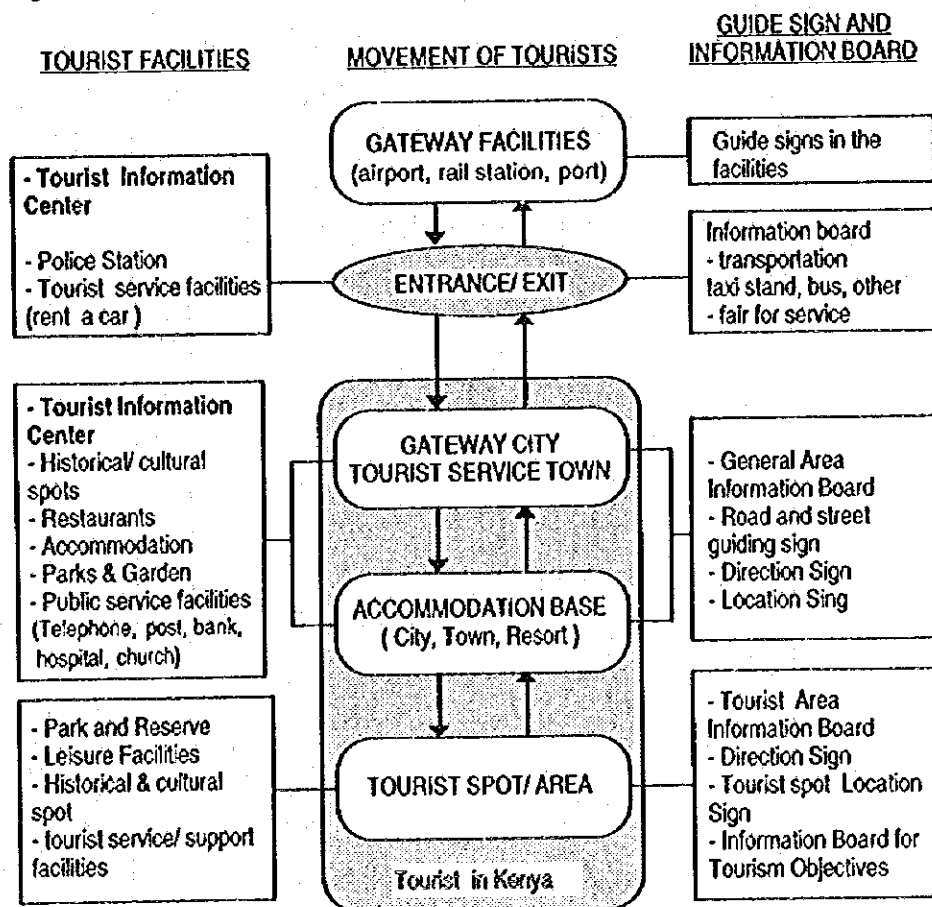
2.2. Tourist Information and Guide Signs

2.2.1. Introduction

Tourist guide signs, information boards and information centres are provided for the following reasons:

- Tourist convenience
- Smooth and comfortable movement and secured feeling
- Expression of hospitality to visitors, and
- Promotion of tourists/encourage tourists to visit.

Figure 5.6   Tourists' Movement and Information Provision

Source: Guide sign and Information Board Manual, Japan National Tourist Organisation (JNTO), modified by JICA Study Team

2.2.2. Types of Guide Sign, Information Board and Information Centre

There are many ways of providing information to tourists. The definition of information facilities discussed here are summarised below.
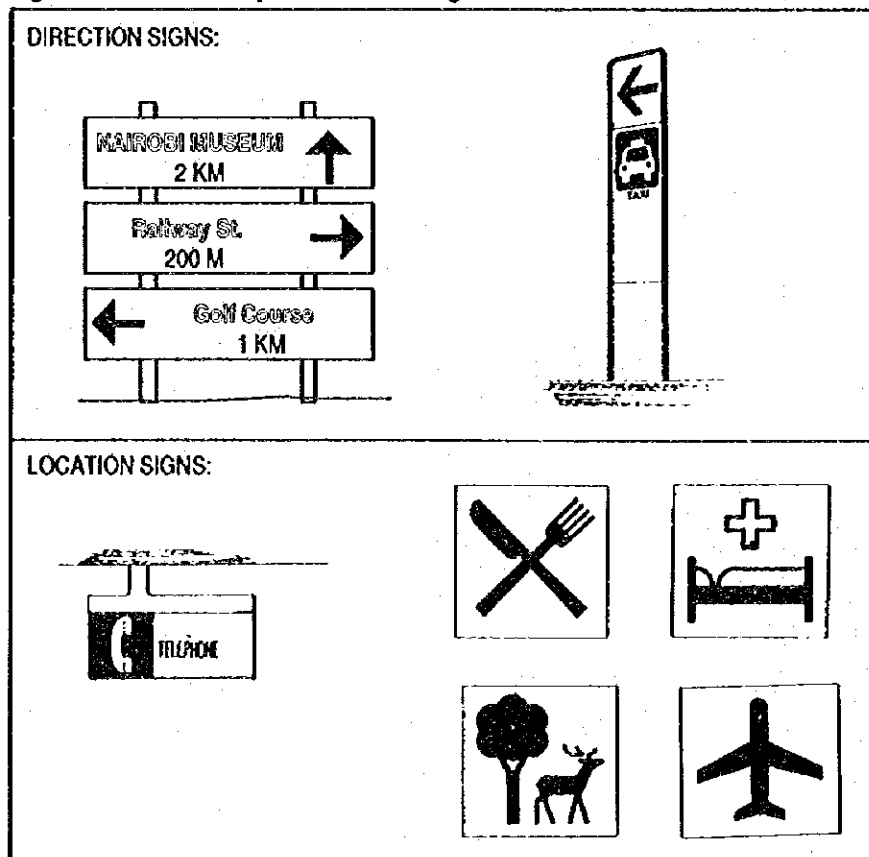
(1) Guide Sign

The guide signs are provided in the facilities or the designated areas. There are two type of signs; a direction sign and a location sign. A direction sign is installed to guide visitors to a destination. A location sign indicates the location of a tourism objective.

Road signs on the highways and streets are the most common guide signs. It shows names of the places with arrows on the sign board. Guide signs direct the visitor or users to the designated places in the public buildings such as airports, railway stations and bus terminals.

Location signs are usually posted in front of the facility or entrances of the place. The following figure shows examples of guide and location signs.

Figure 5. 7   Examples of Guide Signs

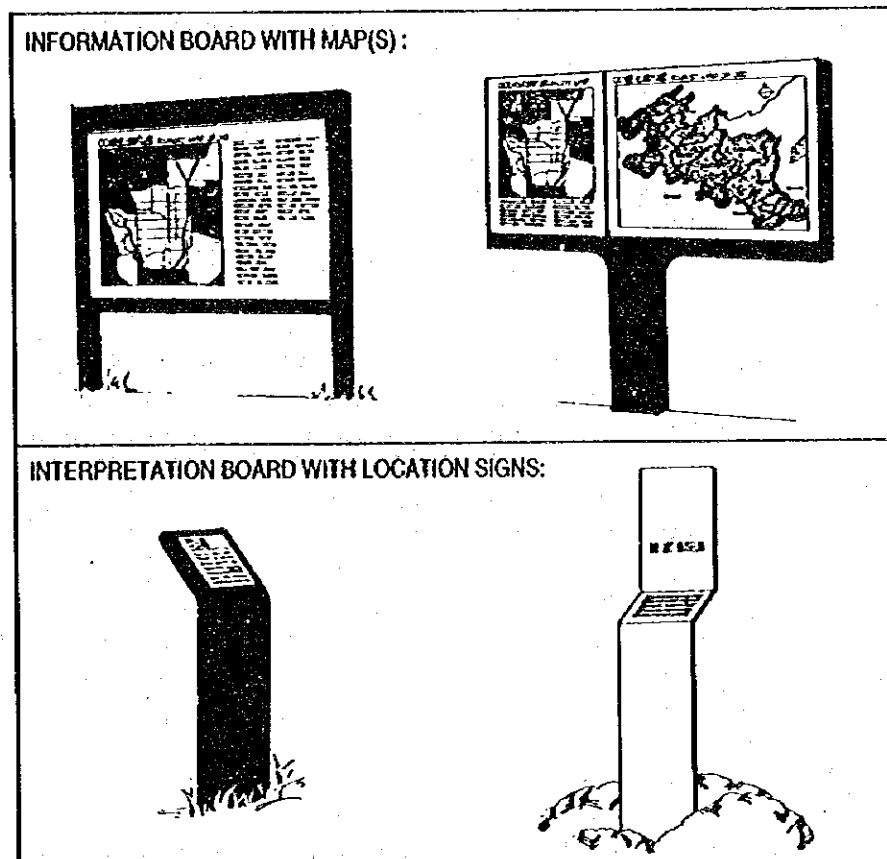Source: JNTO "Guide sign and Information Board Manual"

(2) Information Board

Information boards provide necessary information to the visitors in the tourist area. Locations of tourism objectives and tourism related establishments and usually indicated by using a map or combination of maps and descriptions.

An interpretation board is also a type of information board. An interpretation board is in many cases combined with a location sign.

Figure 5. 8   Examples of Information Board

INFORMATION BOARD WITH MAP(S):

INTERPRETATION BOARD WITH LOCATION SIGNS:

Source: JNTO "Guide sign and Information Board Manual"

(3) Information Centre

A tourist information centre is a facility that provides tourist information to visitors. Various kinds of brochures and maps should be available at the centre, and permanent staff, who can give tourist information to the visitors, should be present. Public telephones, toilets and bulletins should also be available at the centre.

2.2.3. Signing and Information System Development

Installation criteria for guide signs, information boards and information centres are summarised in the following table. The provision of guide signs, information boards and information centres at the international airports and gateway cities of Nairobi and Mombasa is most important as the visitors to Kenya get the first information and impression of Kenya at the gateways cities.

Table 5. 4   Installation Criteria

Type of Information Medium	Gateway (Airport)	Gateway City (Nairobi)	Transport Terminal	Tourist Service Town	Along Highways	Tourist Wayside Facilities	Tourist Zone/ Spot
GUIDE SIGN							
Direction Signs	XX	XX	XX	XX	XX	X	XX
Location Signs	XX	XX	XX	XX	XX	XX	XX
INFORMATION BOARD	XX	XX	XX	XX		XX	XX
INFORMATION CENTRE	XX	XX	X	X		X	X

Note: XX - Indispensable, X - Recommendable, Blank - Not necessary
Source: JICA Study Team

All guide signs should be understood by visitors, who have different social and cultural back grounds. Using the standard design of internationally recognised pictorial images is recommended.

The information provided at information centres should be different depending on the location and the operating body of the centre. The tourist information centre located at the international airports should provide general tourist information covering the whole country such as transportation arrangements, accommodation, places of interest and so on. Regional tourist information centres should concentrate on providing information about their service area.

2.2.4. Implementation Body

Various levels of organisations are involved in providing the guide signs, information boards and information centres. Co-ordination among the responsible organisations is also important to secure the consistency and quality of information for the visitors.

a. Gateway and Gateway City

Provision of sufficient information is important at the international airports especially Nairobi and Mombasa.

- Kenya Airport Authority is responsible for the installation of all guide signs and information boards in the airport area.

- <u>MOTW</u> should provide tourist information centres at the exit of arrival terminals.

In accordance with the analysis of the airport questionnaire survey carried out by this study, the average length of stay in Nairobi is approximately 7 days (6 nights). Provision of tourist attractions in Nairobi is quite important for the satisfaction of their stay. Nairobi is also the base for tours to the other parts of Kenya.

- <u>MOTW</u> should provide a tourist information centre at the heart of Nairobi City. It should be able to provide all necessary information to tourists not only on Nairobi, but also all the tourists' destinations in Kenya.

- <u>Nairobi City Council</u> should provide guide signs and information boards along the streets in the city area. Co-ordination with MOTW and tourism related organisations is necessary.

- <u>Mombasa County Council</u> should provide the same information means as Nairobi.

b. **Transport Terminals and Tourist Service Town**

Transport terminals such as local airports, railway stations and bus terminals should provide appropriate information to the visitors. Providing the information at railway stations, airports and bus terminals is quite important for the convenience of tourists.

- <u>Kenya Airport Authority</u> is responsible for installation of all guide signs and information boards in the domestic airports.

- <u>Kenyan Railway</u> is responsible for installation of all guide signs and information boards in the passenger areas. Providing tourist information centres in the terminal stations should be considered in co-operation with MOTW, local authorities and private tourism organisations.

- <u>Local governments</u> should provide guide signs and information boards at the bus terminals. Bus terminals located in the major tourist towns are the most appropriate location.

- <u>Local governments</u> should provide guide signs and information boards along the streets in the town areas. Co-ordination with MOTW and local tourism related organisations is necessary.

c. Along the Highway and Tourist Wayside Facilities

Properly located guide signs along the highway create a feeling of approaching the destinations and progress of the trip. Self driving tourists will be guided smoothly and safely. Tourist information provided at the wayside facilities will promote tourists to attractions at the destination. An interpretation board should be provided at scenic points or tourist rest areas with special attractions.

- <u>Ministry of Public Works and Housing</u> (MOPWH) should provide guide signs along the national highways. Location signs indicating the tourism attraction should be specifically designed under co-ordination with MOTW and related agencies.

- <u>MOTW</u> should provide information boards (interpretation boards) at the wayside facility areas, including view points along the national highways.

- <u>Local government</u> should provide the tourist information centre, if the location of the facility is situated appropriate for promotion of tourists.

- <u>Private enterprises</u> located in the facility area should share a part of the cost for maintenance of the information boards.

Tourism related organisations or enterprises could be the cooperators for the provision of information. They could share a part of the cost for the installation of guide signs and information boards for a small advertisement on the signs.

d. Tourist Area or Spot

- <u>KWS</u> should provide guide signs, information boards and tourist information centres in the national parks.

- <u>Local governments</u> should provide guide signs and information boards in the national reserves. The design and installation standard should be consulted by KWS. They should include wildlife information and environmental protection guidelines.

- <u>Local governments</u> should provide guide signs and information boards at major tourist spots in their administration area.

3. Marketing Plan

3.1. Words Definition

In the broad sense, or as a technical term, the word "marketing" implies a whole marketing process composed of market research, product development and sales promotion. In the narrow sense, or as a general term, it implies sales promotion. On the other hand, the word "promotion" is often confused with "sales promotion" that is comparable to marketing in its narrow sense.

In order to avoid the confusion, the study team uses the term "promotion" only in the sense of managerial measures to encourage development. In other words, promotion activities include marketing as well as other measures, such as institutional arrangements, policy planning, and guideline setting.

This master Plan has followed the process of marketing in its broad sense as the study team has undertaken comprehensive market research and planned tourism products that would meet the market needs identified through the research. This section, however, focuses on the last process of marketing, that is sales promotion techniques to market Kenya in the world tourism market.

3.2. Premises for the Marketing Activities in Kenya

The following points should be considered to determine an appropriate marketing organisation structure and their marketing techniques.

3.2.1. More Importance on Implementation Than Sophisticated Techniques

Since MOTW has not conducted active marketing activities so far and tends to lack in the expertise, more importance should be placed on the ease of implementation than showing off sophisticated marketing skills.

3.2.2. Private Sector Initiative

For the same reason mentioned above, MOTW should learn marketing know-how from the private sector. At the initial stage, marketing activities should be conducted with private sector initiative.

3.2.3. Small Organisations

Marketing activities require prompt responses to the changes in markets. Therefore, marketing organisations should be small in size for quick decision making in conducting marketing activities.

3.2.4. Local Organisation's Involvement

It is important to promote local governments' and communities' participation in tourism to distribute tourism benefits to a wider range of people. This implies increasing importance of local tourism organisations in marketing activities. The national level marketing organisation and local tourist organisations should demarcate their tasks so to ensure effective marketing as a whole.

3.2.5. Low Cost Marketing

Since the budget allocated for marketing activities is very limited at present, marketing organisations should inevitably be budget conscious. More importance should be placed on organisations' activities to create market awareness through the stimulation of the travel trade and mass-media, rather than direct advertisement toward the general public.

3.3. Marketing System

An overview of a proposed marketing system for Kenyan tourism is shown in Figure 5. 9. The proposed Tourist Board, local tourism organisations as well as MOTW (Tourist Information Centre) are to collaborate with each other to establish an effective marketing system. Attached arrows in the figure show the flow of travel information to visitors in Kenya, the travel trade in Kenya and overseas, and potential visitors.

The same system should work to collect market information for the Kenyan travel trade, local tourism organisations and the Tourist Board. The information flow is in the reverse direction as that of the travel information.

The following sections discuss the roles of the respective organisations.

Figure 5. 9   Marketing System and Flow of Tourism Related Information
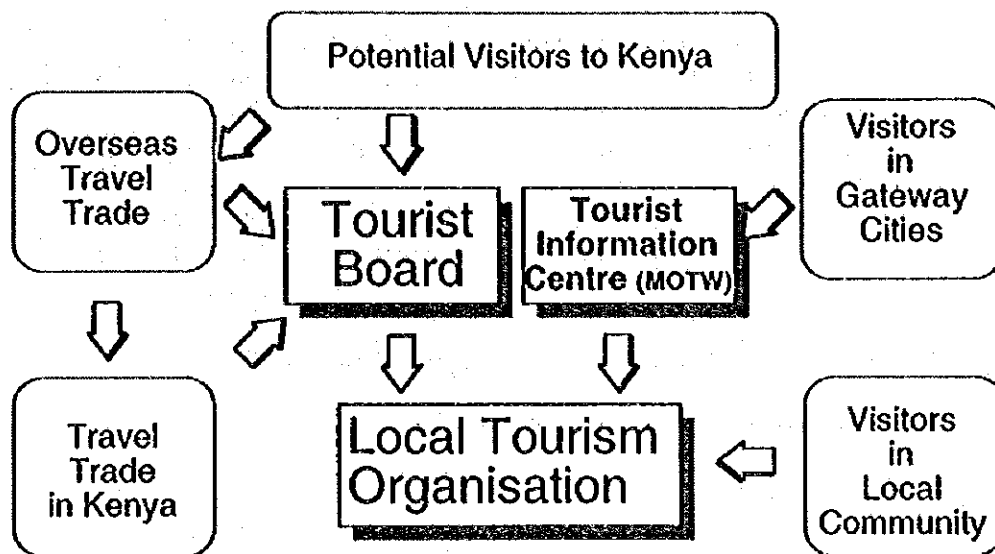
Source: JICA Study Team

3.3.1. Tourist Board

As proposed in "Tourism Development Administration" of this chapter, the Tourist Board is the body that will be responsible for the national and international marketing activities. The board is tasked to convey travel information to, and obtain market information on the source markets, espacially overseas markets. The information the board should convey to source markets is basically a motivation type of information for potential visitors, as well as the information for the travel trade.

Supporting local tourism organisations by providing tourism know-how and market information is another important function of the board.

3.3.2. Local Tourism Organisations

MOTW and the Tourist Board should help the establishment of local tourism organisations to promote community-based tourism as discussed in "Tourism Development Administration" of this chapter.

The organisation is tasked to produce and provide tourist information to their visitors as well as the travel trade in Kenya and the Tourist Board. The local information is delivered to visitors by the organisation itself, and by Tourist Information Centres, and to potential visitors and the overseas travel trade by the Tourist Board.

3.3.3. Tourist Information Centres

Tourist Information Centres are tasked to provide travel information, and distribute travel information materials such as brochures, maps and posters to the visitors in Kenya. The information the centres distribute is basically the know-how type of information.

The centres should help local tourism organisations in distributing their materials to the visitors in gateway cities and resort areas to lure them out to community-based tourist attractions.

3.4. Appropriate Marketing Techniques in the Kenyan Context

(1) Production of Promotion Materials

a. Brochure

There are basically two types of brochures. One is to motivate potential tourists to visit a destination, and another is to give practical know-how to explore the destination for those, who are already motivated. The Tourist Board and local tourist organisation should demarcate their activities in brochure production. The Tourist Board should concentrate on producing the former type, namely brochures that convey a favourable destination image to the market, motivate the travel trade to sell Kenya and lure out tourists to visit Kenya.

The Tourist Board should produce two types of motivation brochures. One is for the potential tourists, and another is for the travel trade.

Know-how brochures could better be produced locally as it is less expensive, easier to produce and they should be distributed locally. The board should give advise to local tourism organisations on how to produce their brochures.

b. Maps

Maps are important to promote tourism, especially in towns and resort areas. This is a variation of know-how brochures that give practical information to tourists to explore an area and they have a significant influence to spread tourism benefits to a wider range of people.

Production of tourist maps are basically a local tourism organisation's role but the Tourist Board should co-operate with them in producing and distributing the material.

A map should contain information not only on hotels and tourist objectives, but also on any local establishments that could be useful or interesting for tourists. They are restaurants, discos, curio shops,

fashion boutiques, boat hires, travel agents, galleries, typical traditional architectures, scenic spots, post offices, banks, and bus stations. What would be interesting for tourists should be researched and discussed within the respective tourist organisations.

Tourist maps should not be like a geographical map, but one with illustrations, brief comments and telephone numbers of enterprises. They do not necessarily have to be in colour, and availability has the priority over quality. The map should be distributed not only through tourist information centres, but through hotels and tourism related establishments that participate in local tourism organisations.

The production cost could be covered from contributions collected from the establishments on the maps.

c. Visual Materials

Poster, slides and videos are tools to create visual images of a destination, which significantly influences visitor arrivals. The Tourist Board should produce several posters that represent the core images of Kenya as well as slide photos and videos for presentation and to stimulate the travel trade's awareness of Kenya.

Establishing a public photo library for the travel trade would be appreciated, as it reduces the brochure production cost.

d. Newsletter for the Travel Trade in Kenya

The Tourist Board should publish a monthly newsletter for its members. It should contain the following information:

- Information on new tourism products obtained from the board members, local tourism organisations, tourism co-operatives and tourism sections in local governments

- Market information on the source markets, such as lifestyles related to tourism, popularity of destinations, new market opportunities, as well as statistical data on the market side obtained from the overseas representatives, and

- Statistical data on tourist arrivals to Kenya diverted from the MOTW's monthly report.

e. Official Sales Handbook

The Tourist Board should publish an official sales handbook for the travel trade that contains comprehensive information and know-how to arrange and sell travel to Kenya, as well as its neighbouring countries such as Uganda, Tanzania and Rwanda. The book would be distributed by the overseas representatives or mailed from Kenya. The production cost could be supplemented by advertisements in the book.

f. Newsletter for the Overseas Travel Trade

The Tourist Board should publish another newsletter for the overseas travel trade. It should contain information on new tourism products and services, proposals for familiarisation visits and tourism related news like opening of a boarder and a change in immigration procedures. The Tourist Board should issue the newsletter on a bi-monthly or quarterly basis to supplement the official handbook that would be produced on a yearly or bi-annual basis. A part of the information in the newsletter could be diverted from the newsletters for the Kenyan travel trade.

The newsletter make a good excuse for overseas representatives to call on their customers. They could be mailed directly to the travel trades in countries, in which no representatives are appointed.

(2) Trade Stimulation

a. Sales Visit and Workshop

Sales visit is the most basic technique for trade stimulation. The visit does not only aim at providing information of tourism products, but at establishing friendship with the travel trade. A workshop is a more advanced form of trade stimulation that generally accomopanies video or slide presentations and a lecture on how to sell respective tourism products. To hold serial workshops travelling in a country is called a "road show."

The Tourist Board should send sales missions to potential markets periodically to increase market awareness in the markets. The visit could be combined with the travel trade shows, exhibitions, and tourism events.

The most important marketing activity of local tourism organisations is to provide their tourism product information for, and to establish friendship with the Kenyan travel trade and the Tourist Board as well. If they successfully persuade the travel trade and the board into selling their products, they would publicise the products in their own interest. The visits should be made periodically to keep a good relationship

with the trade and to obtain feedback for further improvement of their products.

b. Familiarisation Visit

Familiarisation visit is a free and complimentary travel provided for those in the travel trade. It is a popular marketing technique to stimulate the travel trade to sell a destination. It is particularly useful to introduce new tourism products. To establish a friendship with the participants during the visit is also important to enhance its effect.

It is generally conducted with the contribution of free or "promotional fare" air tickets, transportation and accommodation from the travel trade. The Tourist Board is tasked to persuade the trade into contributing their services, and to collect participants through the network of overseas representatives.

The Tourist Board should help local organisations to find appropriate persons for such trips. The visits could be incorporated in a familiarisation visit for the overseas travel trade conducted by the Tourist Board.

c. Participation in Travel Trade Shows

A travel trade show is an opportunity for the Kenyan travel trade to publicise Kenya toward the travel trade and to meet potential customers. The Tourist Board should participate in the trade shows held in major source markets. In addition to the distribution of brochures, some attractions, such as offering of a prize, small give-aways and performance of music would make Kenya more impressive for the visitors in trade shows.

d. Approaches to Potential Tour Organisers

Academic circles, hobbies and sports clubs are potential organisers of special interest groups. Environmental NGOs are also potential organisers for eco-tourism like "tree-planting tours." Overseas representatives should find and approach these circles and clubs that could be interested in Kenya. Opportunities for special interest tours should be sought with the collaboration between overseas representatives and the Tourist Board in Nairobi.

Once a new opportunity and its know-how to arrange the SIT travel is established, it should be included in the official handbook to publicise the new opportunity.

(3) Publicity

a. Journalist Familiarisation Visit

Familiarisation visits should also be provided for journalists and travel editors. It aims to publicise a destination to the general public and the travel trade through newspapers and travel magazines. It is useful to introduce a new tourism product.

Besides familiarisation visit, the Tourist Board should co-operate with the media in covering tourism related events, arranging interviews and gathering data for their articles. This could also work as a deterrent against negative press.

b. Co-operation with Film Crews

As was the case with "Out of Africa," movies and TV programmes greatly influence the general public to visit a destination. The Tourist Board should co-operate with movie or TV crews in their film-shootings, or even promote them to come to Kenya by giving them incentives like discounted accommodations.

Co-operation in obtaining special permissions for film-shooting in restricted areas is appreciated by the crews and the reputation of a helpful country could attract more and more film shootings, which results in more media exposure of Kenya. Film crews often suffer from bureaucracy in custom procedures to bring in their equipment. The crews highly appreciate MOTW and Tourist Board's cooperation in clearance of custom procedures..

Kenya's diversity in landscape, ecosystem and ethnic groups should be an advantage in film-shooting, as almost any part of Africa could be filmed in the country. This should be appealed through the marketing activities.

c. Co-operation in Commercial Exhibitions

Shopping centres and department stores in tourist-generating countries host small-scale exhibitions from time to time to improve their corporate image, as well as to stimulate sales of goods by luring people out to their establishments with these events. They are looking for appropriate themes for exhibitions. They could therefore be approached by an overseas representative, who could influence them to hold a Kenya exhibition. Co-operation with them in borrowing exhibits from museums in Kenya is appreciated as it tends to be hampered by bureaucracy. As with the case of movies and TV programmes, these exhibitions would be advertisement of Kenya.

It should be noted that this is a potential opportunity to advertise and sell Kenyan products. Joint exhibitions with the Ministry of Commerce and Industry may deserve consideration.

(4) Tourist Event

A tourists event is held to publicise a destination through media coverage and to promote visitor arrivals. This is basically the role of local tourism organisations, but the Tourist Board should provide them with expertise in conducting the event, and publicise the event for the travel trade and the general public both, in Kenya and overseas.

There are plenty of examples for this all over the world and they could be learned through overseas representatives. The event should better be based on a local festival and aim at entertaining both, local people and tourists.

This type of event has been proposed in the Kisii village tourism project and discussed in details.

(5) Advertisement

Advertisement is classified into two categories. One is for the general public through the mass media, such as newspapers, magazines, and TV. Another is for the travel trade through travel trade magazines and trade shows.

Advertisement in travel trade magazines and participation in travel trade shows is less expensive than direct advertisement and, therefore, a more common way to promote a destination.

Feasibility of the advertisement for the general public largely depends on the number of potential visitors to Kenya as well as advertisement costs in respective countries. It is therefore not recommendable for all countries. This, however, will increase its importance as Kenyan tourism grows. Cost for direct advertisement and appropriate media for advertisement differ significantly from country to country. Localised advertisement strategies should be established through discussions with the representatives.

Preferences for media, in particular magazines, reflects the lifestyles of their readers. An important consideration for direct advertisement is to choose the best medium, whose readers are consistent with the development directions of Kenyan tourism such as up-market shift, ecotourism, enforcement of cultural attractions, and inland resort development.

(6) Public Relations

a. Crisis Management

The Tourist Board should tackle crisis management of Kenyan tourism. Although Kenyan tourism has suffered from unreasonable negative press, no effective counter measure has ever been taken before. To respond quickly to a crisis, the Tourist Board should secure a contingent budget and prepare a crisis management manual that includes know-how on refutation and counter advertisement.

Advertisement in a newspaper that covers a country is very expensive in general. However, the Tourist Board should consider the advertisement, if a negative press is found to hinder Kenyan tourism considerably.

b. Mass Media

The Tourist Board should establish good relations with the mass media to make them advertise Kenyan destinations. As journalists and editors need topics their readers are interested in, they would be grateful if the Tourist Board offers a familiarisation visit to a less known destination, or co-operate with them in gathering data and arranging interviews. Friendship established through these activities could have a latent influence on controlling the negative press.

c. NGOs

Environmental NGOs are critical of the tourism impact on the environment, but many of them are also happy to issue "ecotourism approval" to tour operators and government agencies that take good care of the environment. These approvals, in turn, would promote tourism to Kenya. The Tourist Board should keep good relations with these NGOs, obtain their feedback, and utilise them as an advertising measure.

(7) Multi-Country Co-operation

The promotion of multi-country travel assumes that each participating country has tourism products which its partners do not have, and the gain from the cooperation is perceived to be distributed relatively equally among the countries. Secondly, this is the strategy for the countries that have little awareness in the source markets and limited budget for marketing activities. In other words, countries at a more advanced stage tend to oppose the concept as they prefer the tourists to stay longer in their own countries for their maximum benefit. Thirdly, those who travel in a wide area are generally long-haul tourists.

Therefore, the promotion of multi-country travel should target countries, in which the travel to Kenya is regarded at a very initial stage of growth. In this context, North America, Australia & New Zealand and East Asia are the markets in which Kenya should consider to promote multi-country travel. Potential cooperators for the promotion would be African countries that have tourism products other than wildlife tourism. Countries in the Indian Ocean, namely, Seychelles, Mauritius, and Maldives are also potential cooperators with Kenya for the longer-haul markets. Cultural tourism in India could be combined with Kenya for the East Asia market considering the current airline routes. Tourism products that Kenya should provide for the cooperation are the ones related to wildlife.

Tanzania will be the most formidable rival of Kenya as the country is developing beach resort tourism, and if it is achieved, the country has the same set of tourism products as Kenya, namely beach, Swahili cultural heritage and wildlife. However, it could be possible for both countries to make joint advertisement of the East African Safari Circuit as a "common property" while competing with each other in the European market for beach resort tourism. Opening of the Kenya-Tanzania boarder in the Mara-Serengeti area needs special emphasis as it strengthens the competitiveness of both countries in the world tourism market.

Wildlife tourism such as gorilla and chimpanzee watching in Uganda and Rwanda combined with the beach resort tourism in Kenya is quite feasible to promote even in the European market.

3.4.2. Actions to be taken by MOTW and Local Governments

The activities listed below result in promotion of tourism as a secondary effect. They are more suitable for MOTW and the local government to take the initiative than for the Tourist Board and local tourist organisations.

(1) Publicity of Tourism Benefits to Kenyan People

MOTW should publicise invisible benefits of tourism to Kenyan people caused by trickle-down effects, and it should formulate a national level consensus to develop tourism as one of a few key industries of Kenya. This would result in improved hospitality of local people to tourists.

(2) Sister Cities

Establishment of sisterhood with overseas' cities and provinces should be promoted in terms of tourism development. Exchange between sister cities inevitably increases visitor arrivals to Kenya and overseas sister cities could definitely be a promotion channel for Kenyan tourism.

(3) Nomination to World Heritage

Kenya should nominate some of her natural and cultural heritage for inclusion into UNESCO's World Heritage. This will make good advertisement and have an immediate effect to attract tourists to Kenya.

3.5. Kenya's Appeals to the Market

Kenya's appeals to the market is condensed to the following concept:

The Gateway to African Experiences

This concept stresses the importance of opening Kenyan tourism to a wider range of people. The following strengths of Kenyan tourism should be appealed through marketing activities as discussed in the previous section.

(1) Easiness of Travel

Although Kenyan tourism leaves much room for improvement, it must be stressed that Kenya is one of the few countries in Africa that are able to provide their visitors with amenities of an international level. Kenya is the most accessible and one of the easiest parts of Africa to travel in.

(2) Suitability for Beginner Tourists to Africa

An agreeable travel condition in Kenya implies her suitability for people, who are beginners in Africa. There are potential tourists, especially in North America and the Pacific Rim, who are interested in African cultures and wildlife, but think that it is not for beginner tourists. Kenya should appeal to this type of potential tourists.

(3) Transportation Hub to Any Part of Africa

Nairobi is a hub of air transport in Africa and this implies Kenya's position as a gateway to Africa. Kenyan tourism should promote travels to Africa via Nairobi with a few days break in a Kenyan resort.

(4) Destination for a Rest and Relax after Safaris in Africa

Although Kenya's neighbours are planning tourism development centred on wildlife, they could attract only the adventure oriented portion of the market for the time being. Kenya can appeal these safari tourists for a rest and relax in her beach or inland resorts after their tough journey.

(5) Availability of Diversified Tourist Attractions

Kenya's diversity in climate, landscape and ethnic groups make tourists experience Africa in one country. The tourism diversification policy of this Master Plan is to enhance this strength in the future.

(6) Chances to Enjoy African Countryside and Villages

Kenya plans to be one of the rare places in Africa, in which tourists can enjoy a stay in a typical African atmosphere. Traditional cultures, local handicraft as well as idyllic landscape are proposed as new attractions of Kenyan tourism.

3.6. Marketing Directions by Market Segment

This section discusses specific directions by each market segment. The following table summarises target markets of the respective market segments.

Table 5. 5   Market Opportunities by Geographical Region

	Africa	South Asia	Europe	America	East Asia	Oceania
Beach resort	X		XX			
Wildlife and ecotourism		X	XX	XX	XX	XX
Mountain resort	X	XX	XX	X	X	X
Cultural tourism	X	X	XX	XX	XX	XX
Convention	XX	X	X	X	X	X
Cruise and Rail Safari	X	X	XX	X	X	X
Private ranch		X	XX	XX	XX	XX
Village tourism	X	X	XX	XX	XX	XX
SIT	X	X	X	X	X	X
Activity holidays	X	X	XX			

Legend: X: possible, XX: strongly possible
Source: JICA Study Team

As a general rule, tourism types based on Kenya's indigenous characteristics attract longer-haul tourists rather than resort tourism and activity holidays, which are affiliated to resort tourism.

3.6.1. Tourism Product Segments

(1) Beach Resort Tourism

a. Target Markets

- Primarily Europe.

- The Lamu area targets at culture and resort type tourists for tourists from North America and the Pacific Rim.

b. Areas

- All areas in the Coastal Tourism Region

c. Images to Provide

<u>Sun, sea and sand</u>

This image is the traditional set of beach resort advertisement. Whiteness of the coral sand on Kenyan beaches is a strength over some of the competitors, such as Sri Lanka, India, Turkey and Thailand. This point should be stressed in brochures and posters.

<u>Seafood and game fishing</u>

Swahili seafood image of lobsters, tuna and kingfish and game fishing image should be added to the beach image.

d. General Directions

Europe will continue to be the dominant market to the region. The Tourist Board, however, should tackle to diversify markets within Europe. Spain and Scandinavia is an immediate opportunity. In the long term perspective, Eastern Europe will emerge as a new market for the coast.

The Mombasa area should appeal to the European market as a reasonably priced but very exotic destination with "safari" and "ecotourism" as attractions.

The Lamu area should target tourists, who would like to enjoy a leisurely stay in an exotic milieu, appealing its "Swahili" cultural image. The Northern area should appeal to up market resort tourists as a "hideaway." Both areas should target at upper-markets than the Mombasa area.

e. **Special Considerations for Marketing Techniques**

Consider direct advertisement with a focus on beach resort equipped with ecotourism attractions in Europe through magazines or newspapers.

Send a sales mission to Eastern Europe composed of overseas representatives in Europe and the board's staff.

Conduct intensive familiarisation visits for the travel trade and journalists to Lamu, when the water supply projects are completed in the area. To publicise the area, choose appropriate media to be consistent with the area's marketing policy of the up-market orientation.

(2) Wildlife Tourism

a. Target Markets

-   General interest tourists all over the world.
-   As for the ecotourism in the coast, Europe is the primary market.
-   Academic circles, and
-   NGOs for environment and wildlife conservation.

b. Areas

-   All over Kenya

c. Images to provide

Wildlife in Savannnah landscape

Because of the similarity in landscape with Masai Mara, more visuals of the Northern part of the Central Tourism Region, that is Samburu and Laikipia, should be provided for the market.

Wildlife in the forest

Appeal the image through good visual materials to promote visitor arrivals to the Central and Western Tourism Regions.

Ecotourism

Closer contact with, lower impact on and financial contribution to conserve the environment are the key concept of ecotourism. Emphasise ecotourism style wildlife tourism such as:

- Nature walk
- Horseback safari
- Bird watching
- Camel safari
- Mangrove cruise, and
- Turtle's spawning watching.

d. General Directions

"Eco-friendly" is the key concept for marketing Kenya in this field. Of the images concerning ecotourism, nature walk or walking safari is most important for general interest tourists and this aspect should, therefore, be stressed in visual materials.

Appeal Samburu, Laikipia and Mararal areas as substitutions for Masai Mara. The area should appeal "intimate" services in "private ranches." The low density of tourists in ranches is another point to be appealed.

The Masailand tourism region should target the more upper market wildlife tourists, in order to avoid overuse of its resources. Tsavo East should concentrate on Rail Safari and beach resort tourists in the Mombasa area.

As for special interest wildlife tourism, academic circles, clubs and environmental NGOs are potential organisers for special interest tours, such as bird-watching, botany and zoology.

e. Special Considerations for Marketing Techniques

Create brochures and good visual materials that stress ecotourism style wildlife tourism. Consider direct advertisement in Europe, North America and East Asia to appeal this.

Conduct intensive trade stimulation measures in East Asia, Oceania, North America.

The Tourist Board together with the Kenyan travel trade should exchange ideas with environmental NGOs to have their feedback and, more preferably, acquire official "eco-friendly" approvals from them.

Approach tour wholesalers that specialise in "educational tours" or similar type of special interest package tours through overseas representatives. Co-operation with them in creating new tour routes makes a good promotion to develop the market.

Similarly, approach academic circles and NGOs through overseas representatives to organise special interest tours.

(3) Mountain and Highland Resort Tourism

a. Target Markets

- Europe
- South Asia
- East Asia

b. Areas

- Mt. Kenya and Mt. Elgon

- Suburb of Nairobi (Ngong Hills)

c. Images to provide

<u>Lush green forest</u>

Without creating the image, mountain and highland resort developments will not be successful. The markets, however, have little awareness of the image.

<u>White Highland</u>

The forest image should be combined with the "white highland" image to give target markets an up market implication. The white highland image should be enhanced by the images of rail safari in a revived "Uganda Rail," colonial architectures typically represented by Karen Blixen Museum and game-viewing in an exclusive private ranch.

d. General Directions

This market segment aims at shifting Kenya's tourist image towards an up-market direction. Marketing measures should be chosen, which are consistent with this policy.

As this is a new type of tourism introduced to Kenya, intensive marketing activities should be made when it is introduced.

South Asia is a potential market for this market segment in a long-term perspective considering the relatively short distance to Kenya, ties with Kenya through past immigration, and their tradition to spend the hottest months in mountain resort. Pay attention to the market for appropriate timing to start marketing activities.

The "white highland" image may be quite useful to create an up-market destination image especially in the East Asian Market. Appealing the image combined with ecotourism could be the best way to create Kenya's tourism image in the market, as the market has very little image of Africa at present.

e. Special Considerations for Marketing Techniques

Produce good visual materials such as posters, brochures and videos that represent a favourable mountain resort image.

Conduct intensive trade stimulation measures including travel trade familiarisation visits, participation in travel trade shows when the tourism products are developed. Invite journalists from the target market to make them cover the introduction of new tourism products.

Send a tourism mission to India and stimulate the travel trade to publicise Kenya as an alternative mountain resort destination.

Appeal the charm of mountain trekking and mountaineering. Stress that trekking routes are not for skilled mountaineers, but for everybody.

(4) Cultural Tourism

a. Target Markets

- Culturally motivated tourists from all over the world

b. Areas

- Primarily at the coast

c. Images to provide

Townscape in Lamu and Mombasa Old Port Area

The tourist image of "white stone town with tropical sea in the background" should be established.

Ruins in tropical forest

The Gedi ruins typically represent such image.

d. General Directions

Appeal the image to the longer-haul market (North America, Oceania and East Asia) to attract culturally motivated tourists.

Create good visual materials that publicise the image of "stone town." The visual should not stress "Arabic" but "Swahili" in order to differentiate Kenya from the competitors in North Africa and the Middle East.

e. Special Considerations for Marketing Techniques

Co-operate with journalists in covering these tourism products. Appeal to potential tourists through a careful selection of advertising media. Invite journalists especially from North America, Australia and East Asia to the coast to make them publicise the cultural destination image of Kenya.

Produce a brochure for the overseas travel trade in the longer-haul market that concentrates in cultural tourism in the coast. In the brochure, model itineraries combined with wildlife tourism in the inland should be proposed to develop the new market.

Local tourism organisations should produce good town maps that give information on tourism objectives as well as tourism establishments, such as curio shops and restaurants to encourage tourist's spending in towns.

(5) Rail Safari and Indian Ocean Cruise

a. Target Market

- A high income group of general interest tourists.

- At least, at the initial stage of the introduction, Europe would be the primary market.

b. Areas

- Mombasa, Tsavo, Nairobi, Nakuru, Kitale (Rail Safari).

- Mombasa and Lamu as well as combined destinations with Zanzibar, Madagascar and Seychelles (Indian Ocean Cruise).

c. Images to provide

Luxurious and chic facilities for both Rail Safari and Cruise

Sun, sea, coral reefs, exotic Swahili towns (for Indian Ocean Cruise)

Revived "Uganda Rail"

Magnificent views of Rift Valley (for Rail Safari)

d. General Directions

Both Rail Safari and Indian Ocean Cruise are to create a high image for Kenyan tourism to promote her upper-market shift.

As for Rail Safari, an image of the old Uganda Rail is definitely the key concept for a visual creation.

e. Special Considerations for Marketing Techniques

General techniques to stimulate the travel trade apply.

To maintain a high image of the tourism products, adopt a "selective distribution" strategy, in which only the tour operators that concentrate on the up-market can sell the products.

Invite journalists and travel editors for a test run before they are officially inaugurated.

(6) Private Ranch Tourism

a. Target Markets

- A high income group of general interest tourists.

b. Areas

- Primarily the Central and Masai Mara Tourism Regions

c. Images to Provide

Wildlife tourism in an exclusive atmosphere

Idyllic African countryside

d. General Directions

Appeal to the "intimate" and "exclusive" atmosphere of private ranches by producing brochures and posters.

Enhance marketing activities in East Asia as the "ranches" are very rare in the area.

e. Special Considerations for Marketing Techniques

General techniques for trade stimulation apply. Put importance on developing the East Asian market.

Consider a "selective distribution" strategy to maintain a high image of tourism.

Establish an organisation of tourist private ranches and open a representative office in Nairobi to provide information on members' establishments for tourists and the travel trade.

(7) Village Tourism

a. Target Markets

- Culturally motivated tourists from all over the world.
- Special interest tourists in anthropology and ethnology.

b. Images to create

<u>A village in a natural setting and its friendly people</u>

Traditional architecture, costume, and anything considered to be unique for tourists.

<u>Handicraft and its craftsmen</u>

To publicise local industry is important to increase tourism benefit to the village.

c. Areas

Kisii District in the Western Tourism Region. Opportunities exist all over Kenya.

d. General Directions

Establishment of District level tourist organisations is the prerequisite to develop and market this type of tourism. The organisation should play the dominant role in planning and marketing the destination.

Consider to attract tourists, who are prepared to experience the locality. Local tourism organisation should target at cultural tourists and SIT tourists rather than the mass market.

Independent tourists are also an important target market, therefore provision of tourist information both, at the gateway cities and the village itself are important.

e. Special Considerations for Marketing Techniques

The local tourism organisation should approach the travel trade in Nairobi to persuade them to include the town as a stop-over point for their safari itineraries at the initial stage. Tour operators that specialise in the culture and SIT markets have priority for this approach.

The local tourism organisation should provide their products information for the Tourist Board to make the board publicise the village to the world market.

Host and invite the travel trade to a tourist event to publicise the town.

Enhance information provision for independent tourists in Nairobi and Mombasa. Prepare maps and brochures and ask tourist offices in the gateway cities to distribute them to tourists.

(8) Special Interest Tourism

a. Target Markets

- Academic circles and clubs
- Environmental NGOs and circles

b. Images to create

Subject to each special interests

c. Areas

- All over Kenya

d. General Directions

Turkana, Northern (Marsabit) and Tana Basin target at adventurous tourists at the initial stage, but gradually shift their target towards general interest tourists as tourist facilities improve.

Direct approach to potential organisers by the Tourist Board and overseas marketing representative makes the most effective promotion of the market.

e. Special Considerations for Marketing Techniques

Approaches to appropriate organisers such as academic circles, clubs are the most effective way to develop the market.

Approach tour operators that handle "culture tours" or "educational tours" and co-operate with them in making special arrangements.

Produce a special brochure for special interest tours that Kenya has opportunities to offer.

(9) Activity Holidays

a. Target Markets

- Europe
- East and Southern Africa
- Domestic

b. Areas

- Nairobi and Central Tourism Region

- Coastal Tourism Region.

c. Images to provide

Subject to each activities

d. General Directions

This is rather an addition to resort tourism than an independent market segment.

e. Special Considerations for Marketing Techniques

Provide accurate information to resort oriented tourists through brochures and the handbook.

Look for clubs and circles for sports, in which Kenya has opportunities to offer. They could organise special interest tours to Kenya.

(10) Convention and Conference Tourism

a. Target Markets

- Academic circles and universities

- United Nations and NGOs based in Nairobi

- African multi-country organisations

- Government agencies

b. Areas

- Nairobi

- Mombasa and its vicinity

c. Images to provide

<u>Modern convention facilities and hotels</u>

<u>Efficient services for supporting organisers</u>

<u>Good amenity in the cities</u>

<u>Colourful "post convention" menus such as wildlife safaris, cultural attractions</u>

d. General Directions

Establish convention bureaus in Nairobi and Mombasa to promote convention tourism and approach to potential convention organisers. Privide the organisers with the services that would lesson their burden to host a convention.

Nairobi should target at authentic conventions, while Mombasa should put importance on conventions associated with incentive travels.

e. Special Considerations for Marketing Techniques

The Tourist Board should prepare a brochure for "incentive travel in Kenya" targeted at potential organisers of the travel. The brochure should contain information on what convention organisers would need such as convention facilities, accommodation, convention related services.

Convention bureaus should approach academic circles, government agencies, secretariats of African multi-country organisations, NGOs stationed in Nairobi and the United Nations and provide them with appropriate information and know-how to host conventions and conferences.

3.6.2. Regional Market Segments

(1) Domestic and Neighbouring Countries

As for Kenyans, tourism should be promoted to encourage understanding of people living in different circumstances.

Kenya should promote conventions and seminars in Nairobi and Mombasa targeted at the domestic market and neighbouring countries as Nairobi and Mombasa are one of the few cities in Africa that could host international conventions.

(2) Europe

Beach resort tourism combined with ecotourism attractions would be the core demand from the market. Kenya, however, should make efforts to develop new markets such as mountain resort tourism, private ranch tourism, cultural tourism, and village tourism, to make them stay longer in the land. Since the market is the largest, niche market segments and SIT tourism is the most viable in Europe.

Another consideration is to the diversification within Europe. European countries other than UK and Germany are far below saturation level and therefore worth efforts to develop their markets. In the long term perspective, Central and Eastern Europe needs attention.

(3) North America, Australia and New Zealand

Wildlife tourism will be the core demand from the markets. Marketing activities in the markets are far from satisfactory and need to be enhanced by appointing local marketing representatives. The markets are higher spenders than Europe and this would rationalise to enhance the marketing in the markets.

Approach tour packagers in Australia and New Zealand that handle "educational tours" with a professional interpreter accompanying a tour group. This is a variation of SIT but targets at a more wider range of people than usual SITs. Wildlife related tourism resources could be better utilised in this type of package tours.

Extending the length of stay is the isue for the markets as they tend to make multi-country travel such as Kenya- Tanzani- Zimbabwe- South Africa. Appeal tourism products other than wildlife tourism to the markets to make them stay longer in Kenya. Cultural attractions in the coast, private ranch and village tourism could be promising for the diversification.

(4) South Asia

Mountain resort tourism combined with wildlife attractions would be a possible style of their travel to Kenya in the future. Although tourism to Kenya is underdeveloped at present, and the Indian government still maintains strict control on foreign currency, attention should be paid to develop a new market.

(5) East Asia

Wildlife tourism is the core tourism demand from the area. Together with the enhancement of marketing activities, consider to appoint a overseas marketing representative in Japan to make him market Kenya in East Asia. Introduce direct flight from Nairobi to Bangkok or Hong Kong to improve flight connection to the area. These actions will tap the immediate opportunity.

Utilise "white highland image" and literature related to Kenya to create an up-market image of Kenya. The image could help to develop private ranch and mountain resort tourism. This would be relatively easy compared with Europe, as the market does not have the "down - market beach resort tourism" image of Kenya at present.

Conduct intensive trade stimulation measures as the package tour is the most popular form of travel abroad in the market.

In the long-term perspective, develop niche markets, such as village tourism, cultural tourism in the coast and various SITs.

3.6.3. Other Considerations for Advertisement

(1) Image of Mt. Kilimanjaro

The image of Mt.Kilimanjaro has a strong appeal to the market, but the game viewing in Amboseli National Park is reported to be somewhat disappointing. Efforts should be made to create alternative images of Mt. Kilimanjaro combined with objectives other than large animals, such as flocks of birds, geographical features, and people living in the area.

(2) African Handicrafts and Arts

Publicising the above is more important for promoting shopping in Kenya rather than attracting people to Kenya. They can be combined with Kenyan people and village images. Potential items are shown as follows:

- Soapstone Carving
- Machakos Carving
- Kiondo Production
- Kanga Products
- African Designed T-Shirts.

(3) Seafoods

This also aims at promoting tourists' consumption of seafood at local restaurants therefore "a seafood gourmet image" should be created to hint that the food is served at local restaurants rather than a hotel dining. This, however, assumes the improvement of hygiene conditions and cooking skills at local restaurants, which this Master Plan envisages.

3.7. Introduction of New Tour Programmes

The JICA study team proposes to introduce the following tour programmes in order to enhance the competitiveness of Kenyan tourism in the world tourism market. The programmes reflect the plans made by the study team and assume the implementation of the proposed projects and programmes.

A greater number of the tourists coming to Kenya, whether package or independent, combine an itinerant safari in the inland with a leisurely stay at the coast, although the relative share of the two parts differs considerably according to tourist's interests. The programmes introduced here are alternatives for the former part rather than the whole travel itinerary. It is therefore recommended to combine these programmes with a stay at the coast, an inland resort or even itineraries in other countries.

Figure 5. 10 shows the locations of the proposed tour programmes. More details are discussed in the following sections.

Figure 5. 10   Locations of Tour Programmes
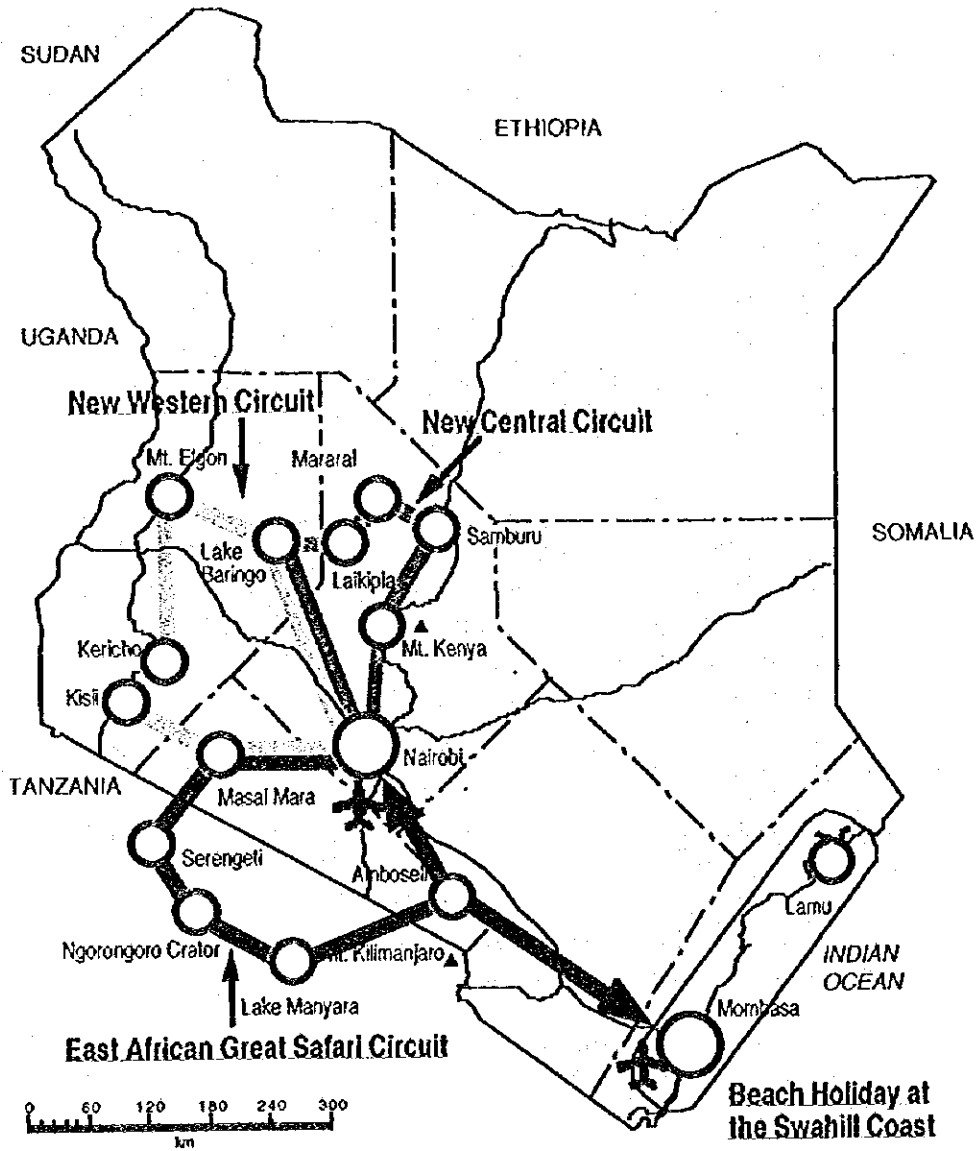
(1) The New Central Circuit

This itinerary covers major new tourism products in the Central Tourism Region and introduces new tourism products of trekking on Mt. Kenya and private ranch tourism in Laikipia.

Day 1: Arrive at Nairobi International Airport. Transfer to a hotel in Nairobi. Game meat dinner at the Carnivore Restaurant.

Day 2: Drive to Nakuru for a view of flamingos and Lunch. Visit Thompson's Fall. Proceed to Mt. Kenya Mountain Resort.

Day 3: Full day trekking on Mt. Kenya. Stay at the resort.

Day 4: Drive to Samburu National Reserve. Lunch at a lodge. Afternoon game drive in the reserve.

Day 5: Drive to Mararal National Sanctuary. Visit a Samburu witch doctor.

Day 6: Full day camel safari in Mararal,

Day 7: Drive to a private ranch in Laikipia. Walking safari in the ranch accompanied by a local ecologist.

Day 8: Join the Northern Desert SIT Circuit, or proceed to Lake Bogoria to join the New Western Circuit, or drive back to Nairobi.

After finishing the programme in Laikipia, participants are encouraged to spend more nights in the private ranch to enjoy a leisurely stay in the nature.

This itinerary could be combined with the Northern Desert Circuit and New Western circuit.

(2) The Northern Desert SIT Circuit

This is a circuit targeted at soft adventurers and camping safari lovers, who seek for a real wilderness. Though this circuit has already been utilised to a limited extent by adventurous tourists, it should be made available for a wider range of people by improving travel conditions and security.

Day 1: Drive to Mararal. Evening game drive in Mararal National Sanctuary. Overnight at a lodge

Day 2: Early morning start to Loiyangalani via the oasis of South Horr. Overnight at a lodge by the Jade Sea.

Day 3: Hiking to Mt. Kulal for a view of the lake. After returning to Loiyangalani, visit a Elmolo village. Overnight at a lodge.

Day 4: Full day Lake Cruise visiting South Island, Central Island, Sibiloi National Park and Koobi Fora. Overnight at a campsite at Alia Bay.

Day 5: Drive to Marsabit through the wilderness of Chalbi Desert. Overnight at a campsite.

Day 6: Full day game drive in the volcano mountain. Overnight at a campsite.

Day 7: Drive to Mathews Range. Game drive for a sight of rhinos with a local Samburu guide. Overnight at a campsite.

Day 8: Drive back to Nairobi or, proceed to Lake Baringo to join the New Western Circuit.

(3) The New Western Circuit

This itinerary covers major tourism products proposed in the Western Tourism Region. Participants in this programme enjoy a wide variety of tourist attractions, ranging from game viewing in Masai Mara to village tourism, local industry based tourism of soapstone carving and tea production, ecotourism, caving and mountain resort.

Day 1: Drive to Lake Bogoria for a lunch and a visit to hot springs. Proceed to Lake Baringo and stay overnight at a lodge.

Day 2: Bird watching walk in the morning on the lakeshore with an interpreter. Drive to Kabarnet for a lunch and a magnificent view of Kerio Vally. Proceed to Mt. Elgon Resort for an overnight stay.

Day 3: Visit to the caves in Mt. Elgon National Park.

Day 4: Drive to Kakamega Forest for a forest walk in the national park. After lunch proceed to Kericho via Nandi Hills. Afternoon tea and overnight at the Tea Hotel.

Day 5: Visit a tea factory for watching a tea production and shopping of locally grown tea. After lunch at the factory, drive to Kisii to visit a soapstone carver. Garden dinner party in the evening, with Gusii cuisine, wine and traditional music played by local people.

Day 6: Picnic to Manga Ridge for a view of Lake Victoria and lunch. Drive to Masai Mara.

Day 7: Full day game drive in the reserve.

Day 8: Drive back to Nairobi or proceed to the East African Safari Circuit.

(4) The East African Great Safari Programme

This is a multi-country circuit with special emphasis on wildlife tourism. Opening of the Mara-Serengeti boarder is the prerequisite for establishing the new circuit.

Day 1: Drive to Masai Mara. Game drive in the reserve. Overnight at a lodge.

Day 2: Drive into the Serengeti Plain. Half day game drive. Overnight at a camp site.

Day 3: Full day game drive in Serengeti. Overnight at another camp site.

Day 4: Drive to Ngorongoro Crater. Game viewing on the crater floor.

Day 5: Drive to Lake Manyara. Game viewing in the afternoon.

Day 6: Drive to Meru National Park. Game viewing in the afternoon.

Day 7: Cross the Tanzania-Kenya boarder into Amboseli National Park for a magnificent view of Mt. Kilimanjaro.

Day 8: Drive back to Nairobi or proceed to Mombasa for a stay at the beach.

Tourists can combine all four tour programmes as described above to a four-week safari. If the safari is combined with a one week beach holiday, it would make a comprehensive African experience in five weeks.

(5) Multi-Country Travel

The above mentioned one week programmes could be combined with attractions in partner countries. Some examples are listed below :

- Egypt (wildlife and ancient civilisation)
- India (wildlife and ancient civilasation, for East Asia)
- Madagascar (SIT for ecology)
- Seychelles (beach and wildlife)
- South Africa & Zimbabwe (a comprehensive African travel)
- Uganda and Rwanda (wildlife and beach).

As for Europe, many of the cooperators listed above are competitors, therefore establishing a cooperation would be more difficult than for the longer haul markets.