

REPUBLIC OF KENYA



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

Kenya

(Volume 4)

SUPPORTING TECHNICAL DOCUMENTS

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JAPAN INTERNATIONAL
COOPERATION AGENCY

MINISTRY OF TOURISM
AND WILDLIFE

PACIFIC CONSULTANTS INTERNATIONAL
NIPPON KOEI CO., LTD

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JAPAN INTERNATIONAL COOPERATION AGENCY (JICA)

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

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

Supporting Technical Documents

Final Report (Volume 4)

October 1995

**PACIFIC CONSULTANTS INTERNATIONAL
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The following foreign exchange rate is applied in the study:

USD\$ 1.00 = 50 Ksh = 2.5 K£

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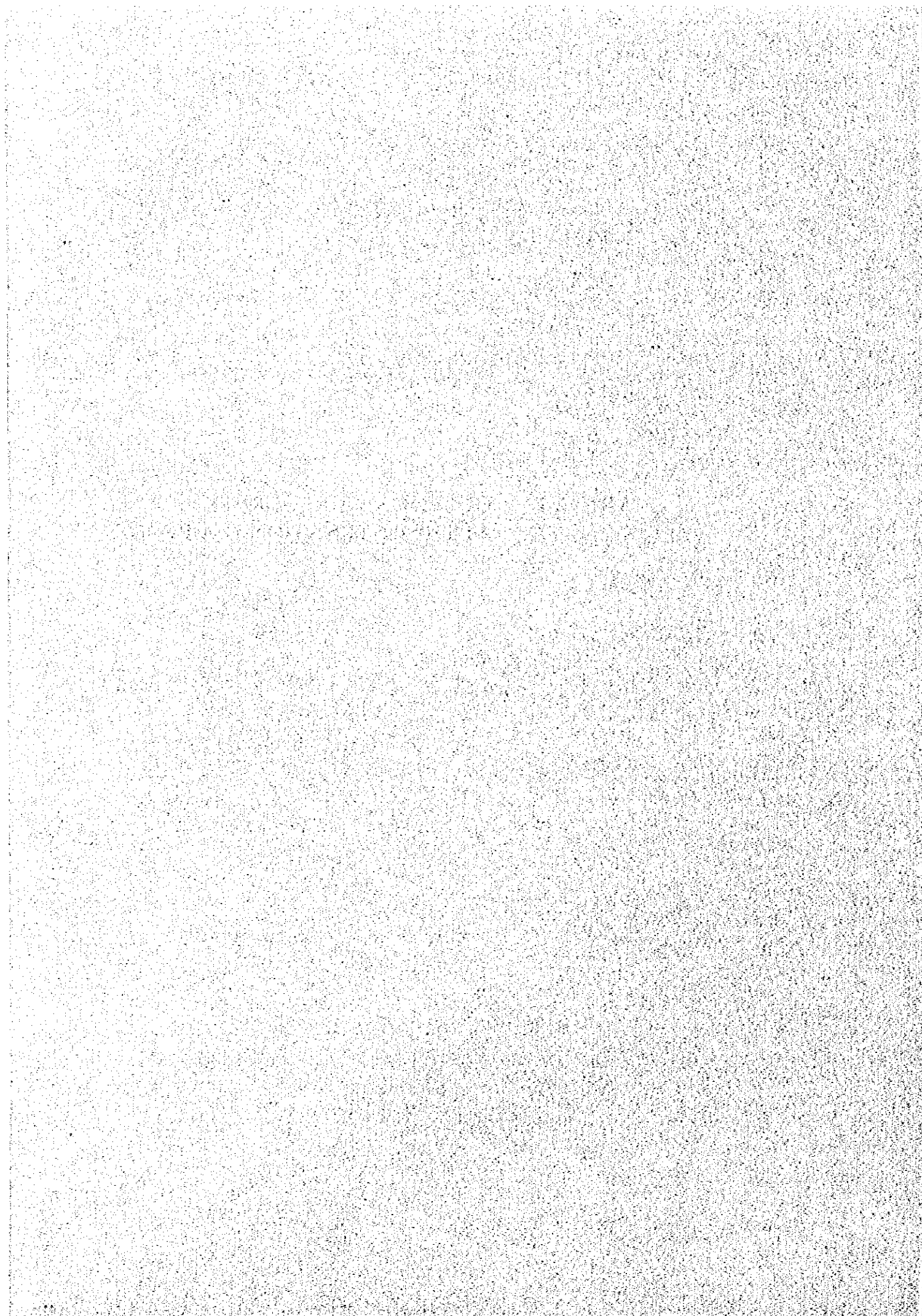
Abbreviations

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

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

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

**ANNEX 1 QUESTIONNAIRE SURVEY
AT THE INTERNATIONAL AIRPORTS**



Annex 1 Questionnaire Survey at the International Airports

1. Objectives of the Survey

The questionnaire survey conducted at Kenya's two international airports (in short: Airport Survey, AS) was aimed at obtaining information from international visitors to Kenya on the following characteristics :

- Demographic profiles,
- Duration of travel and travel patterns,
- Evaluation of Kenyan tourism, and
- Tourism expenditure patterns.

The survey results provided an input basis for establishing the following aspects of the national tourism master plan :

- Creation of a development concept and strategy,
- Identification of development targets by tourism region, and
- Economic and financial analysis of proposed projects.

2. Methodology

(1) Survey Period and Sample Size

Phase-I survey (off-season demand)

From May 10 to May 23, 1994.

1057 samples.

Phase-II survey (summer high season demand)

From July 8 to July 28, 1994.

2050 samples.

Phase-III survey (Christmas high season demand)

From December 19, 1994 to January 10, 1995.

2066 samples.

(2) Survey Sites

The international departure lounges of Nairobi and Mombasa International Airports.

(3) Sampling Method

Target for the sampling were international travellers leaving Kenya. East African residents (Kenya, Tanzania and Uganda) and transit passengers were excluded from the survey.

Pilot surveys were conducted at the international departure lounge at Nairobi Airport on May 6th and 7th, 1994, and December 16th, 1994, in order to test the questionnaire, the appropriate random sampling method and logistical constraints.

Benchmark targets, as shown in Table A. 1, were set to ensure that the distribution of survey samples in proportion to the existing statistics. The benchmarks were based on data contained in the Economic Survey 1992 and Statistical Abstract 1991. Considering the concentration of charter flights to Mombasa during the Christmas season, the benchmark share of Mombasa samples for the December survey was set to 50%; increased from the 40% of the May and July surveys.

Table A. 1 Benchmark Target for the Airport Questionnaire Surveys

Region		Purpose of visit		Airport	(May & July)	(December)
Europe	50%	Holiday	80%	Nairobi	60%	50%
Africa	10%	Business	15%	Mombasa	40%	50%
North America	10%	Others	5%			
East Asia	7%					
Others	23%					

Souse: JICA Study Team, Economic Survey 1992, Statistical Abstract 1991

Surveyors targeted as a potential sample every 3rd, 4th, or 5th passenger entering the departure lounges. These passengers were screened by asking a few questions from a "call sheet", in order to eliminate East African residents and transit passengers. After this process, questionnaire sheets were handed to the passengers to be completed by themselves, but surveyors were always on hand to answer any questions and provide clarification. Call sheets were analyzed on a daily basis to ensure that samplings were within acceptable margins of the pre-set benchmarks.

(4) Data Tabulation

Data in the completed questionnaire sheets were input into a computer database, after a careful check by a site supervisor. As the number of samples for the first survey (May, 1994) was half the size of other surveys, they were weighted two times as against other survey samples. This was done to ensure that the three surveys have the same importance. The total number of the tabulated results are therefore 6230, though the actual number of samples was 5173.

3. Surveyors

Deloitte & Touche Management Consultants Ltd. was sub-contracted by the JICA Study Team to conduct the survey.

4. Findings

4.1. Overview of the Survey Results

For an effective overview of the survey results, the JICA study team devised a new market segmentation by combining two questionnaire items as described below.

Table A. 2 Definitions of Market Segmentation

Market segment name	Description	Share
Package	Those who travelled for holiday, and used a package tour from their origin country	40%
Non-package	Those who travelled for holiday, and purchased tour(s) in Kenya or did not use a tour	31%
VFR	Those who travelled to visit friends and relatives	10%
Business	Those who travelled for business, incentive travel, conference and other unclassified purposes	19%

Source: JICA Study Team

A more detailed analysis on specific topics is discussed in section 4.2.

4.1.1. Demographic Profile

(1) Age/Sex

More than 50% of the visitors on business were men in the 30 to 50 age brackets, while those for VFR concentrated in the less-than-30 age bracket for both, male and female. Comparing the Package with the Non-package market segment, the latter had a higher share of the less-than-30 age bracket and a lower share of the 40-50 bracket than the former (Table A. 3 refers).

Table A. 3 Age/Sex Distribution by Market Segment

	Total		Package		Non-package		VFR		Business	
Male 30	956	15%	354	14%	367	19%	111	19%	112	10%
Male 30-40	1061	17%	364	15%	304	16%	82	14%	302	26%
Male 40-50	974	16%	359	15%	273	14%	42	7%	292	25%
Male 50-60	598	10%	229	9%	175	9%	34	6%	158	14%
Male 60-	235	4%	98	4%	66	3%	25	4%	44	4%
Female 30	883	14%	376	15%	309	16%	108	18%	75	6%
Female 30-40	609	10%	251	10%	202	10%	77	13%	72	6%
Female 40-50	479	8%	249	10%	125	6%	42	7%	54	5%
Female 50-60	194	3%	82	3%	59	3%	23	4%	28	2%
Female 60-	65	1%	22	1%	15	1%	17	3%	9	1%

Source: "Airport Questionnaire Survey" JICA Study Team

(2) Marital Status

37% of the respondents were single, while 57% were married and 6% were "others", including divorced and widowed. Reflecting the younger demographic profile of the segments, Non-package and VFR had higher shares of "single" than the rest (Table A. 4 refers).

Table A. 4 Marital Status by Market Segment

	Total		Package		Non-package		VFR		Business	
Single	2321	37%	769	31%	825	43%	291	49%	409	35%
Married	3524	57%	1537	63%	981	51%	258	43%	706	60%
Others	372	6%	142	6%	125	6%	48	8%	55	5%

Source: "Airport Questionnaire Survey" JICA Study Team

(3) Origin Regions

Europe accounted for 73% of the respondents. It was followed by North America with a 13% share and Africa with a 7% share. 85% of package tourists were from Europe. Africa and North America had higher shares in VFR and Business (Table A. 5 refers).

Table A. 5 Origin Regions by Market Segment

	Total		Package		Non-package		VFR		Business	
Africa	443	7%	44	2%	127	7%	54	9%	209	18%
Europe	4529	73%	2086	85%	1454	75%	385	64%	556	48%
North America	818	13%	219	9%	197	10%	111	19%	280	24%
Near&Middle East	39	1%	6	0%	18	1%	4	1%	11	1%
South Asia	55	1%	1	0%	19	1%	7	1%	26	2%
East Asia	110	2%	23	1%	41	2%	10	2%	35	3%
Oceania	198	3%	70	3%	64	3%	26	4%	37	3%
Others	22	0%	2	0%	10	1%	1	0%	8	1%

Source: "Airport Questionnaire Survey" JICA Study Team

(4) Origin Countries

Visitors from the UK accounted for 23% of the total respondents. It was followed by Germany with a 19% share. The two countries differed in that the UK concentrates in the Package segment, while Germany concentrated in the Non-package. France and Italy were relatively important in the Package segment.

As for VFR, UK surpasses other countries with a 34% share in the segment. USA and South Africa had relative importance in the Business segment (Table A. 6).

Table A. 6 **Origin Countries by Market Segment**

	Total		Package		Non-package		VFR		Business	
UK	1462	23%	706	29%	293	15%	205	34%	245	21%
Germany	1158	19%	422	17%	613	32%	41	7%	68	6%
France	550	9%	371	15%	111	6%	16	3%	50	4%
Italy	365	6%	232	9%	87	4%	17	3%	26	2%
Switzerland	186	3%	76	3%	74	4%	13	2%	22	2%
USA	696	11%	207	8%	159	8%	73	12%	247	21%
South Africa	192	3%	33	1%	46	2%	34	6%	78	7%
Australia	173	3%	64	3%	56	3%	17	3%	35	3%
Others	1442	23%	341	14%	496	26%	182	30%	396	34%

Source: "Airport Questionnaire Survey" JICA Study Team

4.1.2. Itinerary

(1) Length of Itinerary

The average length for the whole itinerary was 23.0 nights, and that of the itinerary within Kenya was 15.7 nights. 10-14 nights was the most common length both, for the whole itinerary and the itinerary in Kenya, accounting for 33% and 35%, respectively. The package segment had the shortest itinerary, while VFR and Business travelled longer than other segments. The business segment was polarised between the short business trip and the lengthy stay for purposes like study in remote areas (Table A. 7 and Table A. 8 refer).

Table A. 7 Length of the Whole Itinerary by Market Segment

	Total		Package		Non-package		VFR		Business	
1-4 nights	180	3%	16	1%	34	2%	9	2%	119	11%
5-9 nights	1179	19%	569	23%	268	14%	39	7%	293	26%
10-14 nights	2047	33%	1012	42%	630	33%	131	23%	253	22%
15-19 nights	864	14%	420	17%	240	13%	79	14%	113	10%
20-24 nights	872	14%	283	12%	347	18%	134	23%	98	9%
25-29 nights	203	3%	43	2%	74	4%	52	9%	31	3%
30-59 nights	491	8%	65	3%	195	10%	92	16%	133	12%
More than 60 nights	285	5%	19	1%	121	6%	46	8%	92	8%
Average length	23.0		15.8		24.6		30.1		31.4	

Source: "Airport Questionnaire Survey" JICA Study Team

Table A. 8 Length of the Itinerary within Kenya by Market Segment

	Total		Package		Non-package		VFR		Business	
1-4 nights	573	9%	75	3%	143	7%	39	7%	306	26%
5-9 nights	1648	27%	765	31%	394	20%	79	13%	399	34%
10-14 nights	2178	35%	1102	45%	713	37%	151	25%	192	17%
15-19 nights	630	10%	244	10%	206	11%	90	15%	74	6%
20-24 nights	649	10%	222	9%	279	14%	99	17%	44	4%
25-29 nights	146	2%	26	1%	62	3%	38	6%	18	2%
More than 30 nights	387	6%	16	1%	133	7%	101	17%	130	11%
Average	15.7		12.3		16.0		21.6		18.8	

Source: "Airport Questionnaire Survey" JICA Study Team

(2) Itinerary within Kenya

The most visited area in Kenya was the Mombasa coast (Mombasa city, Mombasa South, Mombasa North and Malindi), where 64% of the respondents stayed. It was followed by Nairobi with 59% and Masai Mara with 36% (Table A. 9 refers).

Table A. 9 Places Visited and Average Length of Stay by Market Segment

	Total		Package		Non-package		VFR		Business	
Nairobi	3651	59%	945	39%	1082	56%	509	85%	1067	91%
Average nights spent	7.2		2.4		6.4		12.3		9.9	
Mombasa coast	4002	64%	1995	81%	1384	72%	306	51%	269	23%
Average nights	10.5		9.9		11.4		11.5		8.4	
(Mombasa City)	754	12%	229	9%	309	16%	95	16%	112	10%
(Average nights)	6.5		4.4		7.2		10.0		5.6	
(Mombasa South)	1720	28%	879	36%	582	30%	136	23%	99	8%
(Average nights)	10.0		10.0		10.0		9.9		9.9	
(Mombasa North)	1398	22%	716	29%	475	25%	93	16%	99	8%
(Average nights)	10.2		10		11.9		8.8		5.1	
(Malindi)	650	10%	323	13%	236	12%	51	9%	34	3%
(Average nights)	8.5		8.9		8.8		7.7		4.1	
Lamu	280	4%	80	3%	141	7%	33	6%	22	2%
Average nights	4.7		2.2		6.1		5		3.5	
Tsavo	1194	19%	741	30%	347	18%	42	7%	48	4%
Average nights	1.8		1.6		2.0		2.0		1.6	
Amboseli	1008	16%	655	27%	263	14%	30	5%	46	4%
Average nights	1.6		1.5		1.9		2.0		1.7	
Masai Mara	1884	30%	971	40%	594	31%	128	21%	170	15%
Average nights	2.6		2.3		2.5		3.1		4.3	
Mt. Kenya	1030	17%	508	21%	280	14%	116	19%	120	10%
Average nights	2.8		2.1		3.7		3.0		2.6	
Naivasha	1092	18%	569	23%	302	16%	109	18%	99	8%
Average nights	2.0		1.5		2.5		3.3		2.2	
Baringo & Bogoria	573	9%	306	12%	164	8%	38	6%	59	5%
Average nights	2.7		2.0		3.2		2.7		4.9	
Western	282	5%	76	3%	86	4%	60	10%	55	5%
Average nights	7.7		2.3		8.0		7.5		10.8	
Northern	122	2%	34	1%	52	3%	18	3%	18	2%
Average nights	9.3		1.8		5.9		5.2		37.8	
Tana	27	0%	9	0%	5	0%	7	1%	3	0%
Average nights	19.9		2.3		5.0		37.4		4.7	

Source: "Airport Questionnaire Survey" JICA Study Team

80% of the Package segment and 72% of the Non-package segment included the Mombasa area in their itinerary, staying 9.9 nights and 11.4 nights, respectively. Other areas, in which the Package segment showed special preference were Tsavo, Amboseli, Masai Mara, Naivasha & Nakuru, Mt. Kenya and Baringo & Bogoria.

The number of nights spent in Nairobi differed conspicuously depending on market segments. VFR and Business stayed more than 10 nights, while Package stayed only 2.4 nights.

The Package market segment stayed only 2.2 nights in Lamu, but the Non-package stayed 6.1 on average. This shows that the area is currently a stop-over for sight-seeing for package tourists, but is a resort destination for those who travel independently. This may suggest a potential of the area for further development as a resort that could cater even for package tourists.

(3) Combined Destinations

Tanzania inland was the most commonly combined destination with Kenya, as 11% of the respondents visited the place. Other popular combined destinations were Tanzania Coast, Zimbabwe, Uganda and South Africa. 79% of the Package segment visited only Kenya (Table A. 10 refers).

Table A. 10 Combined Destinations with Kenya by Market Segment

	Total		Package		Non-package		VFR		Business	
None	4217	68%	1947	79%	1291	67%	373	62%	566	48%
Tanzania Inland	681	11%	224	9%	260	13%	49	8%	137	12%
Tanzania Coast	370	6%	71	3%	164	8%	45	8%	88	8%
Uganda	274	4%	37	2%	88	5%	28	5%	121	10%
Zaire	91	1%	24	1%	24	1%	8	1%	30	3%
Ethiopia	74	1%	6	0%	22	1%	6	1%	39	3%
Somalia	80	1%	1	0%	11	1%	4	1%	61	5%
Sudan	27	0%	2	0%	8	0%	4	1%	13	1%
Egypt	56	1%	20	1%	19	1%	5	1%	11	1%
Zambia	88	1%	16	1%	41	2%	9	2%	22	2%
Zimbabwe	330	5%	94	4%	120	6%	40	7%	74	6%
Malawi	94	2%	10	0%	54	3%	11	2%	19	2%
Mozambique	28	0%	3	0%	10	1%	8	1%	7	1%
Madagascar	91	1%	28	1%	32	2%	4	1%	27	2%
Botswana	23	0%	1	0%	16	1%	2	0%	4	0%
S. Africa	186	3%	33	1%	55	3%	20	3%	76	6%
Mauritius	67	1%	29	1%	17	1%	7	1%	14	1%
Seychelles	92	1%	47	2%	34	2%	3	1%	8	1%
Other Africa	168	3%	14	1%	48	2%	13	2%	91	8%
Others	284	0	69	3%	66	3%	35	6%	112	10%

Source: "Airport Questionnaire Survey" JICA Study Team

(4) Camping

The figures include only stays in self-catering camp sites. 11% of the respondents experienced camping while they stayed in Kenya, and those who experienced camping spent an average of 5.5 nights at camp sites. Non-package and VFR enjoyed camping more than other segments (Table A. 11 refers).

Table A. 11 Use of Self-Catering Camp Sites by Market Segment

Class Bracket	Total		Package		Non-package		VFR		Business	
Experienced camping	681	11%	203	8%	288	15%	91	15%	90	8%
Average nights spent	5.5		4.8		5.6		6.0		6.1	

Source: "Airport Questionnaire Survey" JICA Study Team

4.1.3. Travell style

(1) Purpose of Travell

Government statistics classify visitors into four categories, that is "holiday," "business," "transit," and "others." The AS intended to make a more detailed breakdown of the holiday and business categories.

71% of the respondents were tourists (those who travell for pleasure purpose). VFR that would have been classified as "holiday" in the government statistics constituted 10% of the respondents.

Incentive travell, which is an important market segment for many of the successful tourist destinations, was almost negligible for Kenya, accounting for only one percent (Table A. 12 refers).

Table A. 12 Purpose of Visit by Market Segment

Class Bracket	Total		Package		Non-package		VFR		Business	
Holiday	4433	71%	2453	55.3	1935	43.7	0	0%	0	0%
VFR	598	10%	0	0%	0	0%	598	100	0	0%
Incentive	58	1%	0	0%	0	0%	0	0%	58	5%
Conference	231	4%	0	0%	0	0%	0	0%	231	20%
Business	744	12%	0	0%	0	0%	0	0%	744	64%
Others	137	2%	0	0%	0	0%	0	0%	137	12%

Source: "Airport Questionnaire Survey" JICA Study Team

(2) Main Attractions

79% of the respondents gave "nature and wild life" as their main attraction to Kenya. It is followed by "beach" and "history and culture." Sports activities were also important attractions to Kenya, as "diving" accounted for 11%, "fishing" for 2%, "mountain climbing for 2% and "golf" for 2% (Table A. 13 refers).

Table A. 13 Main Attractions in Kenya by Market Segment

Class Bracket	Total		Package		Non-package		VFR		Business	
Beach	1813	41%	1030	42%	783	40%	-	-	-	-
Diving	476	11%	274	11%	202	10%	-	-	-	-
Entertainment	220	5%	98	4%	122	6%	-	-	-	-
Fishing	103	2%	47	2%	56	3%	-	-	-	-
Food	389	9%	164	7%	225	12%	-	-	-	-
Golf	66	2%	33	1%	33	2%	-	-	-	-
History&culture	812	19%	449	18%	363	19%	-	-	-	-
Mountain climbing	98	2%	24	1%	74	4%	-	-	-	-
Nature&wildlife	3474	79%	2058	84%	1416	73%	-	-	-	-
Shopping	264	6%	127	5%	137	7%	-	-	-	-
Sports	64	1%	32	1%	32	2%	-	-	-	-
Others	194	4%	95	4%	99	5%	-	-	-	-

Source: "Airport Questionnaire Survey" JICA Study Team

(3) Companion

29% of the respondents travelled with their spouse, 26% travelled alone, 23% with their family members and 19% with their friends.

The shares of those who travelled alone were higher for VFR and business travellers. Package tourists had the highest share of those travelling with their spouse (Table A. 14 refers).

Table A. 14 Travell Companion by Market Segment

Class Bracket	Total		Package		Non-package		VFR		Business	
Alone	1645	26%	211	9%	432	22%	267	45%	721	62%
Spouse	1789	29%	1105	45%	482	25%	106	18%	81	7%
Family	1062	17%	491	20%	397	21%	125	21%	29	2%
Family & friends	231	4%	110	4%	90	5%	16	3%	15	1%
Family & relatives	153	2%	74	3%	54	3%	16	3%	6	1%
Friend(s)	959	15%	384	16%	430	22%	62	10%	73	6%
Business associate(s)	257	4%	27	1%	18	1%	4	1%	208	18%
Others	120	2%	49	2%	25	1%	2	0%	35	3%

Source: "Airport Questionnaire Survey" JICA Study Team

(4) Use of Package Tour

42% of the respondents purchased package tours in their countries of residence, while 51% did not use package tour at all (Table A. 15 refers).

Table A. 15 Use of Package Tour by Market Segment

	Total		Package		Non-package		VFR		Business	
Purchased in origin	2622	43%	2453	100	0	0%	42	7%	122	10%
Purchased in Kenya	420	7%	0	0%	302	16%	45	8%	73	6%
Not used	3121	51%	0	0%	1633	84%	498	85%	969	83%

Source: "Airport Questionnaire Survey" JICA Study Team

(5) Repeat Visit

63% of the respondents visited Kenya for the first time. The percentage was the highest for Package and low for VFR and Business. The average times the respondents visited Kenya was 3.1 including this visit (Table A. 16 refers).

Table A. 16 Times Visited Kenya by Market Segment

Class Bracket	Total	Package	Non-package	VFR	Business
First	3937 63%	2000 82%	1202 62%	229 38%	458 39%
Second	826 13%	229 9%	297 15%	123 21%	162 14%
Third	378 6%	96 4%	118 6%	49 8%	112 10%
Fourth	220 4%	29 1%	84 4%	41 7%	63 5%
5-9 times	348 6%	47 2%	105 5%	68 11%	124 11%
More than 10 times	422 7%	41 2%	105 5%	57 10%	219 19%
Average	3.1	1.6	2.8	4.3	6.4

Source: "Airport Questionnaire Survey" JICA Study Team

4.1.4. Expenditure

The data on tourist expenditure presented in this section are taken only from the Phase III survey conducted in December, 1994 as this phase of the survey has more reliable information. The average total expenditure of the respondents was US\$ 2,466. The Business segment spent the highest and VFR spent the lowest (Table A. 17 refers).

Table A. 17 Total Expenditure by Market Segment for the Whole Trip

Class Bracket	Total	Package	Non-package	VFR	Business
Less than 1000	467 23%	223 26%	98 14%	113 33%	22 24%
1000-2000	446 22%	206 24%	173 25%	44 13%	17 18%
2000-3000	411 20%	170 20%	169 24%	45 13%	13 14%
3000-4000	213 10%	83 10%	100 14%	16 5%	7 8%
4000-5000	70 3%	30 3%	26 4%	8 2%	4 4%
5000-6000	50 2%	23 3%	9 1%	14 4%	2 2%
6000 & over	109 5%	57 7%	27 4%	15 4%	8 9%
Average	2,466	2,426	2,531	2,373	2,730

Source: "Airport Questionnaire Survey" JICA Study Team

The average expenditure per tourist within Kenya was US\$ 747. The Business segment was the highest spender in terms of both, total amount and per day expenditure.

Although package tourists are low spenders, it has to be considered that they had paid for accommodation in their home countries and that their low amount of spending derives partly from the fact that they stay the shortest. Package tourists spent US\$ 46 per day for

items other than accommodation, while non-package tourists spent US\$ 53 per day including accommodation (Table A. 18 refers).

Table A. 18 Expenditure in Kenya by Market Segment only

Class Bracket	Total		Package		Non-package		VFR		Business	
Less than \$500	1004	49%	549	63%	261	37%	142	41%	32	34%
500-1000	411	20%	135	16%	194	28%	52	15%	19	20%
1000-1500	148	7%	44	5%	62	9%	29	8%	6	6%
1500-2000	85	4%	26	3%	40	6%	10	3%	7	8%
2000-2500	34	2%	12	1%	14	2%	6	2%	1	1%
2500-3000	17	1%	5	1%	5	1%	5	1%	0	0%
\$3000 & over	65	3%	18	2%	27	4%	11	3%	8	9%
Average	747		568		841		962		1,160	
Per day expenditure	48		46		53		45		62	

Source: "Airport Questionnaire Survey" JICA Study Team

Average expenditure for shopping in Kenya was US\$ 200. VFR spent the highest and Package spent the lowest (Table A. 19 refers).

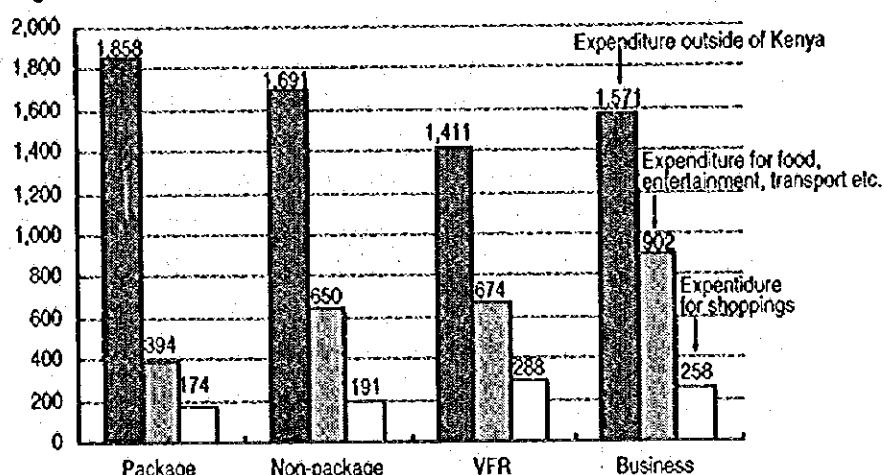
Table A. 19 Expenditure for Shopping in Kenya by Market Segment

Class Bracket	Total		Package		Non-package		VFR		Business	
Less than \$100	955	46%	465	53%	294	42%	136	39%	39	42%
100-200	327	16%	138	16%	124	18%	40	12%	15	16%
200-300	139	7%	54	6%	52	7%	29	8%	2	2%
300-500	184	9%	81	9%	69	10%	22	6%	6	6%
500-700	86	4%	29	3%	38	5%	11	3%	4	4%
700-1000	25	1%	10	1%	12	2%	3	1%	0	0%
\$1000 & over	45	2%	11	1%	14	2%	14	4%	5	5%
Average	200		174		191		288		258	
Per day expenditure	13		14		12		13		14	

Source: "Airport Questionnaire Survey" JICA Study Team

A breakdown of expenditure is shown in Figure A. 1. Since package tourists pays for accommodation in their origin countries, they spent the most outside of Kenya.

Figure A. 1 Breaksown of Total Expenditure by Market Segment



Source: "Airport Questionnaire Survey" JICA Study Team

4.1.5. Market Competition

(1) Competitors

The Caribbean and Mediterranean were the major competitors when the respondents made a final decision to visit Kenya. The Caribbean and the Indian Ocean were more formidable rivals for those who used package tours than those who travelled individually (Table A. 20 refers).

Table A. 20 Competitor Destinations by Market Segment

	Total		Package		Non-package		VFR		Business	
Mediterranean	568	13%	314	13%	254	13%	-	-	-	-
Other Europe	197	4%	109	4%	88	5%	-	-	-	-
Caribbean	847	19%	532	22%	315	16%	-	-	-	-
C.&S. America	235	5%	133	5%	102	5%	-	-	-	-
North America	202	5%	130	5%	72	4%	-	-	-	-
N.&M. East	57	1%	39	2%	18	1%	-	-	-	-
North Africa	185	4%	99	4%	86	4%	-	-	-	-
Sub-Saharan	188	4%	89	4%	99	5%	-	-	-	-
South Asia	162	4%	92	4%	70	4%	-	-	-	-
Southeast Asia	280	6%	146	6%	134	7%	-	-	-	-
East Asia	92	2%	61	2%	31	2%	-	-	-	-
Oceania & Pacific	128	3%	76	3%	52	3%	-	-	-	-
Indian Ocean	180	4%	114	5%	66	3%	-	-	-	-
Others	212	5%	115	5%	97	5%	-	-	-	-
None	855	19%	404	16%	451	23%	-	-	-	-

Source: "Airport Questionnaire Survey" JICA Study Team

(2) Strength

42% of the respondents gave "tourist attractions" as the principal reason for finally choosing Kenya (Table A. 21 refers).

Table A. 21 Strengths of Kenya by Market Segment

	Total		Package		Non-package		VFR		Business	
Lower price	554	13%	346	14%	208	11%	-	-	-	-
Travel time	245	6%	99	4%	146	8%	-	-	-	-
Security	58	1%	28	1%	30	2%	-	-	-	-
Tourist attractions	1846	42%	1159	47%	687	36%	-	-	-	-
Tourist services	130	3%	74	3%	56	3%	-	-	-	-
Shopping	17	0%	4	0%	13	1%	-	-	-	-
Relaxing atmosphere	442	10%	225	9%	217	11%	-	-	-	-
Others	1004	23%	479	20%	525	27%	-	-	-	-

Source: "Airport Questionnaire Survey" JICA Study Team

(3) Media

"Travel agents" and "friends" were two major media that influenced visitors to choose Kenya.

The "Kenya Tourist Office" accounted for only 2%. This figure is considered to be very low, as a survey conducted in Thailand by another JICA study team revealed that some 10% of its respondents gave overseas tourist offices as the principal factor that influenced them to visit Thailand.

"Travel agent" and "brochure" more influenced package tourists, while "friends" influenced individual tourists more than other segments (Table A. 22 refers).

Table A. 22 Media that Motivated to Visit Kenya by Market Segment

	Total		Package		Non-package		VFR		Business	
Travel agent	1797	41%	1214	49%	583	30%	-	-	-	-
Brochures	808	18%	595	24%	213	11%	-	-	-	-
Advertisement	439	10%	270	11%	169	9%	-	-	-	-
Magazines/newspaper	452	10%	287	12%	165	9%	-	-	-	-
Friends	1562	36%	735	30%	827	43%	-	-	-	-
Kenya tourist office	73	2%	43	2%	30	2%	-	-	-	-
Others	446	10%	182	7%	264	14%	-	-	-	-

Source: "Airport Questionnaire Survey" JICA Study Team

4.1.6. Evaluation of Kenyan tourism

(1) Revisit

81% of the respondents wished to visit Kenya again. The percentage is the lowest for package tourists and the highest for visitors for business and study purposes (Table A. 23 refers).

Table A. 23 Intention to Revisit by Market Segment

	Total		Package		Non-package		VFR		Business	
Interested	5038	81%	1903	78%	1560	81%	503	84%	1018	87%
Not sure	869	14%	397	16%	277	14%	73	12%	110	9%
Not interested	252	4%	135	6%	73	4%	13	2%	27	2%

Source: "Airport Questionnaire Survey" JICA Study Team

(2) Destinations for a Revisit

50% of the respondents chose Masai Mara as the destination for their next visit to Kenya. It was followed by Mombasa South, Nairobi, Amboseli, Mount Kenya and Western Kenya (Table A. 24 refers).

Table A. 24 Destinations for a Next Visit by Market Segment

	Total		Package		Non-package		VFR		Business	
Nairobi	1580	25%	547	22%	447	23%	219	37%	346	30%
Mombasa City	989	16%	233	9%	282	15%	126	21%	332	28%
Mombasa South	1592	26%	537	22%	522	27%	176	29%	330	28%
Mombasa North	1112	18%	387	16%	355	18%	120	20%	236	20%
Malindi	984	16%	380	15%	330	17%	109	18%	154	13%
Lamu	974	16%	299	12%	344	18%	135	23%	187	16%
Tsavo	1182	19%	519	21%	365	19%	111	19%	179	15%
Amboseli	1578	25%	730	30%	496	26%	110	18%	230	20%
Masai Mara	3107	50%	1406	57%	887	46%	283	47%	501	43%
Mt. Kenya	1557	25%	615	25%	462	24%	203	34%	261	22%
Naivasha&Nakuru	951	15%	337	14%	298	15%	131	22%	170	15%
Baringo&Bogoria	901	14%	358	15%	263	14%	110	18%	162	14%
Western	1419	23%	641	26%	410	21%	133	22%	221	19%
Northern	1096	18%	404	16%	367	19%	125	21%	189	16%
Eastern	439	7%	163	7%	140	7%	57	10%	72	6%

Source: "Airport Questionnaire Survey" JICA Study Team

However, the above figures are largely influenced by the numbers of those, who actually visited the respective places and it therefore does not always reflect on the attractiveness of the areas. Section 4.2 discusses these results more in detail.

(3) Needs analysis

Improvement scores were calculated, in order to assess the needs for improvement of aspects of Kenyan tourism, by giving one point to "no need for improvement," two to "little need for improvement," three to "needs improvement," and four to "strong needs for improvement."

The highest improvement score of 2.8 was given to "environmental protection", closely followed by "local vendors and beach boys" with 2.7. "Taxi service and public transport" and "security" also recorded high scores. The scores were relatively low for "hotels" and "foods and restaurant."

The beach boy problem was the highest concern for package tourists, more than 80% of whom stayed at the coast. "Security" was considered more seriously by the VFR and Business segments than tourists (Table A. 25 refers).

Table A. 25 Improvement Scores by Market Segment

	Total	Package	Non-package	VFR	Business
Security	2.4	2.2	2.5	2.8	2.8
Beach boys	2.7	2.8	2.8	2.7	2.6
Entertainment	2.1	2.2	2.0	1.9	2.0
Foods	1.9	2.0	1.8	1.8	1.8
Hotel	1.7	1.7	1.7	1.6	1.7
Contact w/locals	2.1	2.2	2.0	1.9	2.1
Shopping	2.0	2.1	2.0	1.9	2.0
Environment	2.8	2.6	3.0	2.9	2.8
Information	2.2	2.2	2.2	2.2	2.1
Local cultures	2.1	2.1	2.1	2.0	2.1
Tour operator	1.9	1.8	1.9	2.0	2.0
Public transport	2.5	2.5	2.5	2.8	2.5

Source: "Airport Questionnaire Survey" JICA Study Team

4.2. Specific Analysis

(1) Bednights' Distribution

Bednights' distribution by market segment was calculated from the survey results as shown in Table A. 26. The coast occupied a 50% share of the total bednights generated by international visitors, followed by Nairobi with a 30% share. The figures in the table, however, do not correspond to the figures in the government statistics for the following reasons :

- Domestic tourists that occupy approximately 15% of the total bednights were not included in the survey,
- There are considerable numbers of unregistered accommodations in Kenya, while government statistics are based on the reports submitted by well-established hotels, and
- Government statistics on accommodations do not cover VFR visitors, who tend to stay at private homes.

Table A. 26 Bed-Nights Distribution by Market Segment

	Total	Package	Non-package	VFR	Business
Total	100.0%	100.0%	100.0%	100.0%	100.0%
Nairobi	29.9%	7.7%	23.4%	51.8%	66.5%
Mombasa City	5.5%	3.4%	7.5%	7.9%	3.9%
Mombasa South	19.5%	29.8%	19.7%	11.1%	6.2%
Mombasa North	16.2%	24.3%	19.1%	6.8%	3.2%
Malindi	6.3%	9.8%	7.0%	3.2%	0.9%
Lamu	1.5%	0.6%	2.9%	1.4%	0.5%
Tsavo	2.3%	4.0%	2.3%	0.7%	0.5%
Amboseli	1.9%	3.3%	1.7%	0.5%	0.5%
Masai Mara	5.6%	7.6%	5.0%	3.3%	4.6%
Mt.Kenya	3.2%	3.6%	3.5%	2.9%	2.0%
Naivasha	2.5%	2.9%	2.6%	3.0%	1.4%
Baringo&Bogoria	1.8%	2.1%	1.8%	0.8%	1.8%
Western	2.2%	0.6%	2.3%	3.7%	3.7%
Northern	1.3%	0.2%	1.0%	0.8%	4.3%
Tana Basin	0.4%	0.1%	0.1%	2.2%	0.1%

Source: "Airport Questionnaire Survey" JICA Study Team

Bednights generated by the VFR and Business segments concentrate in Nairobi, while those by tourists show noticeable concentration at the coast.

Within tourist segments, Non-package shows higher shares in Nairobi, Lamu, Mt. Kenya, Western and Northern than Package. In other words, the result show that these areas, except for Nairobi, tend to be neglected by tour packagers in the source markets,

probably due not only lack of sizable market demand, but to the constraints in accommodation and transportation suitable for group tourists. Higher concentration of non-package tourists in Nairobi reflects the function of the city as the only gateway for scheduled flights from major source markets, and the centre for arranging travells in Kenya as well as its neighbouring countries.

Bednight distribution by origin and tourism region was calculated as shown in Table A. 27. 60% of bednights generated by visitors from Europe concentrated in the Coastal Tourism Region, while the shares are far smaller in other regions ranging from 19% (America) to 27% (Oceania, Africa).

Table A. 27 Bed-Night Distribution by Origin and Tourism Region

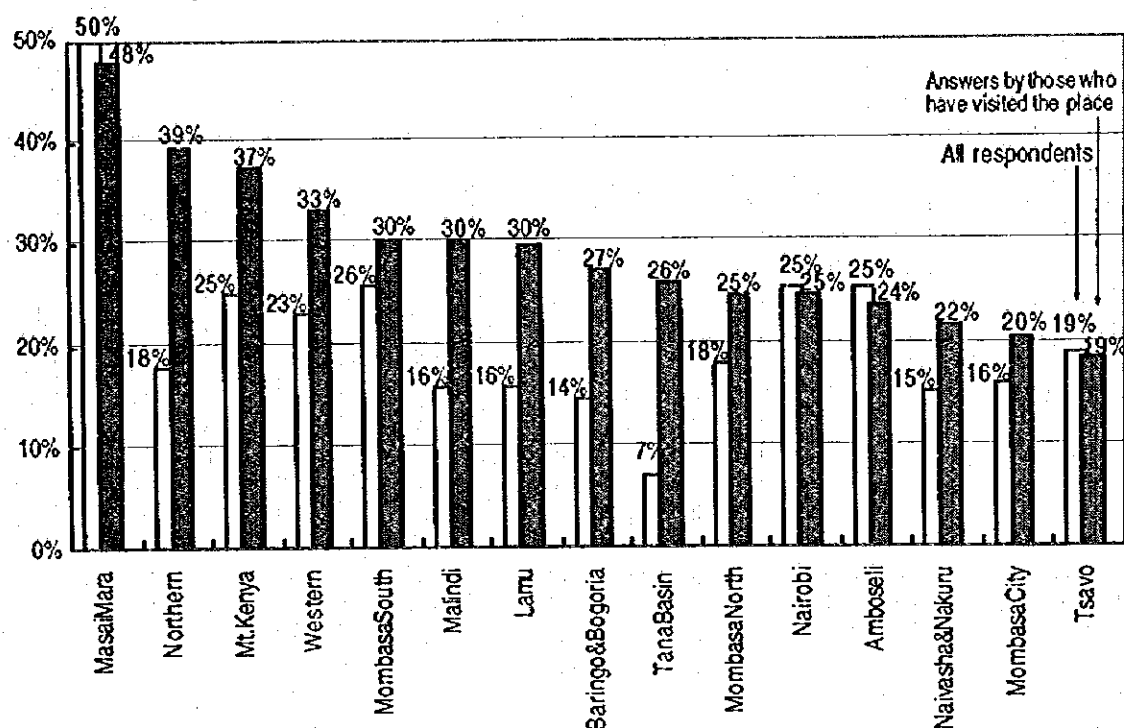
	Total	Africa	Europe		America		Asia		Oceania		
Total	100.0%	100.0%	5.9%	100.0%	73.5%	100.0%	13.9%	100.0%	2.8%	100.0%	3.6%
Nairobi	30.2%	62.7%	3.7%	22.4%	16.5%	49.3%	6.8%	58.7%	1.6%	39.8%	1.4%
Central	5.8%	3.6%	0.2%	4.9%	3.6%	9.9%	1.4%	6.5%	0.2%	9.1%	0.3%
Masailand	7.5%	4.7%	0.3%	6.8%	5.0%	9.9%	1.4%	7.9%	0.2%	19.6%	0.7%
Western	2.5%	1.3%	0.1%	2.6%	1.9%	2.6%	0.4%	0.9%	0.0%	2.9%	0.1%
Turkana	0.9%	0.0%	0.0%	0.4%	0.3%	3.6%	0.5%	0.7%	0.0%	1.0%	0.0%
Northern	0.4%	0.0%	0.0%	0.2%	0.2%	1.8%	0.2%	0.3%	0.0%	0.5%	0.0%
Tana	0.6%	0.0%	0.0%	0.2%	0.2%	3.2%	0.5%	0.0%	0.0%	0.2%	0.0%
Coast	49.6%	27.0%	1.6%	59.2%	43.5%	19.1%	2.6%	25.0%	0.7%	26.6%	1.0%
East	2.5%	0.7%	0.0%	3.1%	2.3%	0.7%	0.1%	0.0%	0.0%	0.3%	0.0%

Source: "Airport Questionnaire Survey" JICA Study Team

(2) Area Evaluation by Visitors to Kenya

The ratio of those, who would like to revisit a place, is an indicator to measure the current attractiveness of the area. It is, however, influenced by the number of people, who actually visited the place. To offset this influencing factor, two revisit ratios have been calculated, that is by areas by those, who actually visited the place. Figure A. 2

Figure A. 2 Revisit Ratio by Those Who Actually Visited



Source: "Airport Questionnaire Survey" JICA Study Team

(3) Visitor Flow

The following tables show the visitor flows for both, within Kenya and among combined destinations.

It is pointed out that Nairobi is the hub for multi-country travel as most visitors that combined other countries with Kenya stayed in Nairobi. Among wildlife safari destinations in Kenya, Tsavo and Amboseli were closely combined with the coast, as 93% and 81% of the visitors to the areas stayed in the Mombasa Coast, respectively. At least 50% of visitors to inland areas of Kenya stayed in the Mombasa Coast.

Table A. 28 Visitor Flow within Kenya and Combined Destinations (1/6)

	Total	Nairobi	Mombasa Coast	Lamu	Tsavo	Amboseli	Masai Mara
Total	6230 100%	3651 100%	4002 100%	280 100%	1194 100%	1008 100%	1884 100%
Nairobi	3651 59%	3651 100%	1597 40%	197 70%	318 27%	497 49%	1403 74%
Mombasa coast	4002 64%	1597 44%	4002 100%	208 74%	1108 93%	812 81%	1217 65%
Lamu	280 4%	197 5%	208 5%	280 100%	63 5%	60 6%	108 6%
Tsavo	1194 19%	318 9%	1108 28%	63 23%	1194 100%	489 49%	278 15%
Amboseli	1008 16%	497 14%	812 20%	60 21%	489 41%	1008 100%	508 27%
Masai Mara	1884 30%	1403 38%	1217 30%	108 39%	278 23%	508 50%	1884 100%
Mt. Kenya	1030 17%	900 25%	530 13%	59 21%	106 9%	260 26%	705 37%
Naivasha & Nakuru	1092 18%	956 26%	654 16%	84 30%	179 15%	298 30%	832 44%
Baringo & Bogoria	573 9%	531 15%	314 8%	43 15%	68 6%	125 12%	431 23%
Western	282 5%	259 7%	157 4%	22 8%	25 2%	31 3%	126 7%
Turkana & Northern	122 2%	110 3%	69 2%	12 4%	7 1%	20 2%	65 3%
Eastern	27 0%	24 1%	20 0%	2 1%	3 0%	4 0%	14 1%
None	4217 68%	1928 53%	3179 79%	170 61%	1049 88%	783 78%	1265 67%
TZ Inland	681 11%	577 16%	332 8%	50 18%	59 5%	103 10%	215 11%
TZ Coast	370 6%	324 9%	192 5%	40 14%	28 2%	42 4%	101 5%
Uganda	274 4%	252 7%	108 3%	19 7%	13 1%	15 1%	66 4%
Zaire	91 1%	87 2%	35 1%	7 3%	2 0%	1 0%	27 1%
Ethiopia	74 1%	74 2%	23 1%	5 2%	4 0%	6 1%	14 1%
Somalia	80 1%	76 2%	23 1%	3 1%	3 0%	5 0%	8 0%
Sudan	27 0%	25 1%	5 0%	1 0%	0 0%	1 0%	2 0%
Egypt	56 1%	40 1%	33 1%	3 1%	5 0%	6 1%	17 1%
Zambia	88 1%	84 2%	33 1%	4 1%	5 0%	7 1%	21 1%
Zimbabwe	330 5%	307 8%	121 3%	21 8%	11 1%	39 4%	120 6%
Malawi	94 2%	89 2%	46 1%	10 4%	3 0%	1 0%	20 1%
Mozambique	28 0%	25 1%	8 0%	0 0%	1 0%	1 0%	5 0%
Madagascar	91 1%	72 2%	32 1%	6 2%	5 0%	9 1%	22 1%
Botswana	23 0%	22 1%	10 0%	0 0%	0 0%	1 0%	3 0%
S. Africa	186 3%	169 5%	55 1%	9 3%	10 1%	14 1%	50 3%
Mauritius	67 1%	49 1%	33 1%	5 2%	16 1%	11 1%	22 1%
Seychelles	92 1%	77 2%	35 1%	3 1%	9 1%	15 1%	54 3%
Other Africa	168 3%	153 4%	46 1%	8 3%	7 1%	7 1%	24 1%
Others	284 5%	268 7%	85 2%	10 4%	7 1%	38 4%	136 7%

Source: "Airport Questionnaire Survey" JICA Study Team

Table A. 28 Visitor Flow within Kenya and Combined Destinations (2/6)

	Total	Mt. Kenya	Naivasha & Nakuru	Baringo & Bogoria	Western	Turkana & Northern	Tana
Total	6230 100%	1030 100%	1092 100%	573 100%	282 100%	122 100%	27 100%
Nairobi	3651 59%	900 87%	956 88%	531 93%	259 92%	110 90%	24 89%
Mombasa coast	4002 64%	530 51%	654 60%	314 55%	157 56%	69 57%	20 74%
Lamu	280 4%	59 6%	84 8%	43 8%	22 8%	12 10%	2 7%
Tsavo	1194 19%	106 10%	179 16%	68 12%	25 9%	7 6%	3 11%
Amboseli	1008 16%	260 25%	298 27%	125 22%	31 11%	20 16%	4 15%
Masai Mara	1884 30%	705 68%	832 76%	431 75%	126 45%	65 53%	14 52%
Mt. Kenya	1030 17%	1030 100%	551 50%	366 64%	107 38%	54 44%	12 44%
Naivasha & Nakuru	1092 18%	551 53%	1092 100%	373 65%	144 51%	62 51%	5 19%
Baringo & Bogoria	573 9%	366 36%	373 34%	573 100%	81 29%	48 39%	6 22%
Western	282 5%	107 10%	144 13%	81 14%	282 100%	36 30%	9 33%
Turkana & Northern	122 2%	54 5%	62 6%	48 8%	36 13%	122 100%	6 22%
Eastern	27 0%	12 1%	5 0%	6 1%	9 3%	6 5%	27 100%
None	4217 68%	634 62%	705 65%	334 58%	159 56%	73 60%	14 52%
TZ Inland	681 11%	140 14%	149 14%	95 17%	57 20%	20 16%	4 15%
TZ Coast	370 6%	52 5%	73 7%	42 7%	34 12%	12 10%	5 19%
Uganda	274 4%	43 4%	61 6%	26 5%	37 13%	14 11%	3 11%
Zaire	91 1%	15 1%	32 3%	9 2%	19 7%	9 7%	1 4%
Ethiopia	74 1%	7 1%	17 2%	6 1%	7 2%	7 6%	1 4%
Somalia	80 1%	9 1%	9 1%	3 1%	4 1%	2 2%	2 7%
Sudan	27 0%	4 0%	5 0%	4 1%	1 0%	3 2%	2 7%
Egypt	56 1%	6 1%	7 1%	6 1%	2 1%	1 1%	0 0%
Zambia	88 1%	16 2%	21 2%	12 2%	7 2%	3 2%	0 0%
Zimbabwe	330 5%	78 8%	92 8%	72 13%	32 11%	11 9%	3 11%
Malawi	94 2%	13 1%	18 2%	14 2%	8 3%	5 4%	0 0%
Mozambique	28 0%	2 0%	5 0%	3 1%	1 0%	1 1%	0 0%
Madagascar	91 1%	11 1%	10 1%	9 2%	3 1%	0 0%	1 4%
Botswana	23 0%	3 0%	8 1%	2 0%	1 0%	3 2%	0 0%
S. Africa	186 3%	27 3%	30 3%	21 4%	6 2%	5 4%	0 0%
Mauritius	67 1%	16 2%	14 1%	7 1%	3 1%	1 1%	1 4%
Seychelles	92 1%	22 2%	25 2%	6 1%	2 1%	1 1%	0 0%
Other Africa	168 3%	19 2%	23 2%	14 2%	10 4%	3 2%	2 7%
Others	284 5%	97 9%	75 7%	63 11%	22 8%	6 5%	0 0%

Source: "Airport Questionnaire Survey" JICA Study Team

Table A. 28 Visitor Flow within Kenya and Combined Destinations (3/6)

	Total	None	TZ Inland	TZ Coast	Uganda	Zaire	Ethiopia
Total	6230 100%	4217 100%	681 100%	370 100%	274 100%	91 100%	74 100%
Nairobi	3651 59%	1928 46%	577 85%	324 88%	252 92%	87 96%	74 100%
Mombasa coast	4002 64%	3179 75%	332 49%	192 52%	108 39%	35 38%	23 31%
Lamu	280 4%	170 4%	50 7%	40 11%	19 7%	7 8%	5 7%
Tsavo	1194 19%	1049 25%	59 9%	28 8%	13 5%	2 2%	4 5%
Amboseli	1008 16%	783 19%	103 15%	42 11%	15 5%	1 1%	6 8%
Masai Mara	1884 30%	1265 30%	215 32%	101 27%	66 24%	27 30%	14 19%
Mt. Kenya	1030 17%	634 15%	140 21%	52 14%	43 16%	15 16%	7 9%
Naivasha & Nakuru	1092 18%	705 17%	149 22%	73 20%	61 22%	32 35%	17 23%
Baringo & Bogoria	573 9%	334 8%	95 14%	42 11%	26 9%	9 10%	6 8%
Western	282 5%	159 4%	57 8%	34 9%	37 14%	19 21%	7 9%
Turkana & Northern	122 2%	73 2%	20 3%	12 3%	14 5%	9 10%	7 9%
Eastern	27 0%	14 0%	4 1%	5 1%	3 1%	1 1%	1 1%
None	4217 68%	4217 100%	2 0%	0 0%	0 0%	0 0%	0 0%
TZ Inland	681 11%	2 0%	681 100%	200 54%	96 35%	38 42%	14 19%
TZ Coast	370 6%	0 0%	200 29%	370 100%	60 22%	19 21%	14 19%
Uganda	274 4%	0 0%	96 14%	60 16%	274 100%	46 51%	12 16%
Zaire	91 1%	0 0%	38 6%	19 5%	46 17%	91 100%	3 4%
Ethiopia	74 1%	0 0%	14 2%	14 4%	12 4%	3 3%	74 100%
Somalia	80 1%	0 0%	7 1%	7 2%	7 3%	2 2%	7 9%
Sudan	27 0%	0 0%	7 1%	6 2%	8 3%	2 2%	3 4%
Egypt	56 1%	0 0%	17 2%	6 2%	6 2%	1 1%	3 4%
Zambia	88 1%	0 0%	39 6%	25 7%	15 5%	5 5%	3 4%
Zimbabwe	330 5%	2 0%	138 20%	85 23%	42 15%	18 20%	12 16%
Malawi	94 2%	0 0%	49 7%	43 12%	15 5%	7 8%	4 5%
Mozambique	28 0%	0 0%	12 2%	7 2%	1 0%	0 0%	1 1%
Madagascar	91 1%	1 0%	29 4%	20 5%	4 1%	3 3%	10 14%
Botswana	23 0%	0 0%	12 2%	11 3%	3 1%	3 3%	1 1%
S. Africa	186 3%	1 0%	46 7%	28 8%	17 6%	1 1%	4 5%
Mauritius	67 1%	0 0%	16 2%	6 2%	3 1%	0 0%	3 4%
Seychelles	92 1%	0 0%	15 2%	13 4%	4 1%	1 1%	0 0%
Other Africa	168 3%	1 0%	31 5%	25 7%	35 13%	21 23%	9 12%
Others	284 5%	0 0%	22 3%	9 2%	14 5%	6 7%	4 5%

Source: "Airport Questionnaire Survey" JICA Study Team

Table A. 28 Visitor Flow within Kenya and Combined Destinations (4/6)

	Total	Somalia	Sudan	Egypt	Zambia	Zimbabwe	Malawi
Total	6230 100%	80 100%	27 100%	56 100%	88 100%	330 100%	94 100%
Nairobi	3651 59%	76 95%	25 93%	40 71%	84 95%	307 93%	89 95%
Mombasa coast	4002 64%	23 29%	5 19%	33 59%	33 38%	121 37%	46 49%
Lamu	280 4%	3 4%	1 4%	3 5%	4 5%	21 6%	10 11%
Tsavo	1194 19%	3 4%	0 0%	5 9%	5 6%	11 3%	3 3%
Amboseli	1008 16%	5 6%	1 4%	6 11%	7 8%	39 12%	1 1%
Masai Mara	1884 30%	8 10%	2 7%	17 30%	21 24%	120 36%	20 21%
Mt. Kenia	1030 17%	9 11%	4 15%	6 11%	16 18%	78 24%	13 14%
Naivasha & Nakuru	1092 18%	9 11%	5 19%	7 13%	21 24%	92 28%	18 19%
Baringo & Bogoria	573 9%	3 4%	4 15%	6 11%	12 14%	72 22%	14 15%
Western	282 5%	4 5%	1 4%	2 4%	7 8%	32 10%	8 9%
Turkana & Northern	122 2%	2 3%	3 11%	1 2%	3 3%	11 3%	5 5%
Eastern	27 0%	2 3%	2 7%	0 0%	0 0%	3 1%	0 0%
None	4217 68%	0 0%	0 0%	0 0%	0 0%	2 1%	0 0%
TZ Inland	681 11%	7 9%	7 26%	17 30%	39 44%	138 42%	49 52%
TZ Coast	370 6%	7 9%	6 22%	6 11%	25 28%	85 26%	43 46%
Uganda	274 4%	7 9%	8 30%	6 11%	15 17%	42 13%	15 16%
Zaire	91 1%	2 3%	2 7%	1 2%	5 6%	18 5%	7 7%
Ethiopia	74 1%	7 9%	3 11%	3 5%	3 3%	12 4%	4 4%
Somalia	80 1%	80 100%	7 26%	1 2%	0 0%	5 2%	0 0%
Sudan	27 0%	7 9%	27 100%	3 5%	1 1%	1 0%	2 2%
Egypt	56 1%	1 1%	3 11%	56 100%	8 9%	11 3%	2 2%
Zambia	88 1%	0 0%	1 4%	8 14%	88 100%	57 17%	24 26%
Zimbabwe	330 5%	5 6%	1 4%	11 20%	57 65%	330 100%	61 65%
Malawi	94 2%	0 0%	2 7%	2 4%	24 27%	61 18%	94 100%
Mozambique	28 0%	2 3%	2 7%	3 5%	5 6%	16 5%	8 9%
Madagascar	91 1%	1 1%	0 0%	4 7%	7 8%	18 5%	4 4%
Botswana	23 0%	0 0%	0 0%	0 0%	6 7%	15 5%	8 9%
S. Africa	186 3%	1 1%	0 0%	2 4%	11 13%	68 21%	23 24%
Mauritius	67 1%	0 0%	0 0%	4 7%	4 5%	11 3%	1 1%
Seychelles	92 1%	1 1%	0 0%	6 11%	0 0%	6 2%	1 1%
Other Africa	168 3%	9 11%	6 22%	0 0%	9 10%	24 7%	4 4%
Others	284 5%	5 6%	0 0%	5 9%	3 3%	20 6%	4 4%

Source: "Airport Questionnaire Survey" JICA Study Team

Table A. 28 Visitor Flow within Kenya and Combined Destinations (5/6)

	Total	Mozambique	Madagascar	Botswana	S. Africa	Mauritius	Seychelles
Total	6230 100%	28 100%	91 100%	23 100%	186 100%	67 100%	92 100%
Nairobi	3651 59%	25 89%	72 79%	22 96%	169 91%	49 73%	77 84%
Mombasa coast	4002 64%	8 29%	32 35%	10 43%	55 30%	33 49%	35 38%
Lamu	280 4%	0 0%	6 7%	0 0%	9 5%	5 7%	3 3%
Tsavo	1194 19%	1 4%	5 5%	0 0%	10 5%	16 24%	9 10%
Amboseli	1008 16%	1 4%	9 10%	1 4%	14 8%	11 16%	15 16%
Masai Mara	1884 30%	5 18%	22 24%	3 13%	50 27%	22 33%	54 59%
Mt. Kenya	1030 17%	2 7%	11 12%	3 13%	27 15%	16 24%	22 24%
Naivasha & Nakuru	1092 18%	5 18%	10 11%	8 35%	30 16%	14 21%	25 27%
Baringo & Bogoria	573 9%	3 11%	9 10%	2 9%	21 11%	7 10%	6 7%
Western	282 5%	1 4%	3 3%	1 4%	6 3%	3 4%	2 2%
Turkana & Northern	122 2%	1 4%	0 0%	3 13%	5 3%	1 1%	1 1%
Eastern	27 0%	0 0%	1 1%	0 0%	0 0%	1 1%	0 0%
None	4217 68%	0 0%	1 1%	0 0%	1 1%	0 0%	0 0%
TZ Inland	681 11%	12 43%	29 32%	12 52%	46 25%	16 24%	15 16%
TZ Coast	370 6%	7 25%	20 22%	11 48%	28 15%	6 9%	13 14%
Uganda	274 4%	1 4%	4 4%	3 13%	17 9%	3 4%	4 4%
Zaire	91 1%	0 0%	3 3%	3 13%	1 1%	0 0%	1 1%
Ethiopia	74 1%	1 4%	10 11%	1 4%	4 2%	3 4%	0 0%
Somalia	80 1%	2 7%	1 1%	0 0%	1 1%	0 0%	1 1%
Sudan	27 0%	2 7%	0 0%	0 0%	0 0%	0 0%	0 0%
Egypt	56 1%	3 11%	4 4%	0 0%	2 1%	4 6%	6 7%
Zambia	88 1%	5 18%	7 8%	6 26%	11 6%	4 6%	0 0%
Zimbabwe	330 5%	16 57%	18 20%	15 65%	68 37%	11 16%	6 7%
Malawi	94 2%	8 29%	4 4%	8 35%	23 12%	1 1%	1 1%
Mozambique	28 0%	28 100%	3 3%	4 17%	8 4%	4 6%	2 2%
Madagascar	91 1%	3 11%	91 100%	1 4%	8 4%	12 18%	14 15%
Botswana	23 0%	4 14%	1 1%	23 100%	12 6%	1 1%	1 1%
S. Africa	186 3%	8 29%	8 9%	12 52%	186 100%	5 7%	5 5%
Mauritius	67 1%	4 14%	12 13%	1 4%	5 3%	67 100%	14 15%
Seychelles	92 1%	2 7%	14 15%	1 4%	5 3%	14 21%	92 100%
Other Africa	168 3%	4 14%	12 13%	4 17%	14 8%	1 1%	3 3%
Others	284 5%	2 7%	3 3%	1 4%	7 4%	3 4%	7 8%

Source: "Airport Questionnaire Survey" JICA Study Team

Table A. 28 Visitor Flow within Kenya and Combined Destinations (6/6)

	Total	Other Africa	Others
Total	6230 100%	168 100%	284 100%
Nairobi	3651 59%	153 91%	268 94%
Mombasa coast	4002 64%	46 27%	85 30%
Lamu	280 4%	8 5%	10 4%
Tsavo	1194 19%	7 4%	7 2%
Amboseli	1008 16%	7 4%	38 13%
Masai Mara	1884 30%	24 14%	136 48%
Mt. Kenya	1030 17%	19 11%	97 34%
Naivasha & Nakuru	1092 18%	23 14%	75 26%
Baringo & Bogoria	573 9%	14 8%	63 22%
Western	282 5%	10 6%	22 8%
Turkana & Northern	122 2%	3 2%	6 2%
Eastern	27 0%	2 1%	0 0%
None	4217 68%	1 1%	0 0%
TZ Inland	681 11%	31 18%	22 8%
TZ Coast	370 6%	25 15%	9 3%
Uganda	274 4%	35 21%	14 5%
Zaire	91 1%	21 13%	6 2%
Ethiopia	74 1%	9 5%	4 1%
Somalia	80 1%	9 5%	5 2%
Sudan	27 0%	6 4%	0 0%
Egypt	56 1%	0 0%	5 2%
Zambia	88 1%	9 5%	3 1%
Zimbabwe	330 5%	24 14%	20 7%
Malawi	94 2%	4 2%	4 1%
Mozambique	28 0%	4 2%	2 1%
Madagascar	91 1%	12 7%	3 1%
Botswana	23 0%	4 2%	1 0%
S. Africa	186 3%	14 8%	7 2%
Mauritius	67 1%	1 1%	3 1%
Seychelles	92 1%	3 2%	7 2%
Other Africa	168 3%	168 100%	11 4%
Others	284 5%	11 7%	284 100%

Source: "Airport Questionnaire Survey" JICA Study Team

5. Survey Results

Table A. 29 By Month of Survey (1/4)

	Total	May	July	December
Total	6230100%	2114 100%	2050100%	2066100%
01. Experience of Kenya				
First	3937 63%	1244 59%	1433 70%	1260 61%
Second	826 13%	298 14%	229 11%	299 14%
Third	378 6%	130 6%	116 6%	132 6%
Fourth	220 4%	84 4%	54 3%	82 4%
5-9 times	348 6%	124 6%	100 5%	124 6%
More than 10 times	422 7%	186 9%	116 6%	120 6%
Average	3.1	3.5	2.9	3
02. Travel companion				
Alone	1645 26%	740 35%	528 26%	377 18%
Spouse	1789 29%	610 29%	569 28%	610 30%
Family	1062 17%	150 7%	412 20%	500 24%
Family & friends	231 4%	58 3%	60 3%	113 5%
Family & relatives	153 2%	34 2%	44 2%	75 4%
Friend(s)	959 15%	322 15%	323 16%	314 15%
Business associate(s)	257 4%	152 7%	81 4%	24 1%
Others	120 2%	46 2%	26 1%	48 2%
03. Whole itinerary				
1-4 nights	180 3%	108 5%	45 2%	27 1%
5-9 nights	1179 19%	542 26%	201 10%	436 21%
10-14 nights	2047 33%	606 29%	701 34%	740 36%
15-19 nights	864 14%	230 11%	342 17%	292 14%
20-24 nights	872 14%	190 9%	393 19%	289 14%
25-29 nights	203 3%	52 2%	76 4%	75 4%
30-59 nights	491 8%	166 8%	199 10%	126 6%
More than 60 nights	315 5%	166 8%	86 4%	63 3%
Average length	23.0	26.8	22.5	19.6
04. Nights in Kenya				
1-4 nights	573 9%	260 12%	196 10%	117 6%
5-9 nights	1648 26%	700 33%	366 18%	582 28%
10-14 nights	2178 35%	616 29%	796 39%	766 37%
15-19 nights	630 10%	182 9%	228 11%	220 11%
20-24 nights	649 10%	134 6%	297 14%	218 11%
25-29 nights	146 2%	44 2%	47 2%	55 3%
More than 30 nights	393 6%	176 8%	114 6%	103 5%
Average	15.7	17.4	15.3	14.4
05. Tourist type				
Holiday	4433 71%	1326 63%	1506 73%	1601 77%
VFR	598 10%	134 6%	119 6%	345 17%
Incentive	58 1%	32 2%	14 1%	12 1%
Conference	231 4%	128 6%	92 4%	11 1%
Business	744 12%	410 19%	265 13%	69 3%
Others	137 2%	84 4%	52 3%	1 0%
06. Competitor destinations				
Mediterranean	574 13%	220 10%	236 12%	118 6%
Other Europe	198 4%	76 4%	65 3%	57 3%
Caribbean	853 19%	228 11%	282 14%	343 17%
C.&S. America	237 5%	90 4%	81 4%	66 3%
North America	202 5%	50 2%	99 5%	53 3%
N.&M. East	57 1%	18 1%	26 1%	13 1%
North Africa	185 4%	62 3%	73 4%	50 2%
Sub-Saharan	190 4%	62 3%	85 4%	43 2%
South Asia	163 4%	40 2%	55 3%	68 3%
Southeast Asia	283 6%	76 4%	106 5%	101 5%
East Asia	94 2%	22 1%	46 2%	26 1%
Oceania & Pacific	128 3%	38 2%	65 3%	25 1%
Indian Ocean	186 4%	-	-	186 9%
Others	212 5%	66 3%	67 3%	79 4%
None	871 20%	278 13%	220 11%	373 18%

Source: "Airport Questionnaire Survey" JICA Study Team

Table A. 29 By Month of Survey (2/4)

	Total	May	July	December
07. Kenya's strength				
Lower price	558 13%	212 16%	199 13%	147 9%
Travel time	247 6%	68 5%	45 3%	134 8%
Security	60 1%	16 1%	17 1%	27 2%
Tourist attractions	1868 42%	420 32%	742 49%	706 44%
Tourist services	132 3%	48 4%	37 2%	47 3%
Shopping	17 0%	2 0%	6 0%	9 1%
Relaxing atmosphere	447 10%	108 8%	123 8%	216 13%
Others	1011 23%	414 31%	323 21%	274 17%
08. Influential media				
Travel agent	1811 41%	524 40%	645 43%	642 40%
Brochures	817 18%	214 16%	332 22%	271 17%
Advertisement	442 10%	134 10%	172 11%	136 8%
Magazines/newspapers	454 10%	138 10%	173 11%	143 9%
Friends	1579 36%	426 32%	556 37%	597 37%
Kenya tourist office	74 2%	20 2%	29 2%	25 2%
Others	448 10%	154 12%	152 10%	142 9%
09. Principal attractions				
Beach	1831 41%	550 41%	609 40%	672 42%
Diving	479 11%	139 10%	145 10%	196 12%
Entertainment	227 5%	84 6%	73 5%	70 4%
Fishing	104 2%	36 3%	20 1%	48 3%
Food	390 9%	134 10%	168 11%	88 5%
Golf	67 2%	16 1%	18 1%	33 2%
History & culture	819 18%	280 21%	315 21%	224 14%
Mountain climbing	98 2%	28 2%	38 3%	32 2%
Nature & wildlife	3505 79%	1042 79%	1259 84%	1204 75%
Shopping	265 6%	96 7%	117 8%	52 3%
Sports	64 1%	16 1%	28 2%	20 1%
Others	196 4%	40 3%	108 7%	48 3%
10. Package tour				
Used a packaged holiday	2622 42%	794 38%	912 44%	916 44%
Purchased tour(s) in Kenya	420 7%	130 6%	145 7%	145 7%
Not used	3121 50%	1190 56%	976 48%	955 46%
11. Places stayed				
11.1. Nairobi	3651 59%	1262 60%	1277 62%	1112 54%
Average nights spent	7.2	8.3	6.5	6.8
11.2. Mombasa City	754 12%	318 15%	231 11%	205 10%
Average	6.5	5.1	8.5	6.4
11.3. Mombasa South	1720 28%	570 27%	570 28%	580 28%
Average	10.0	10.5	10.4	9.0
11.4. Mombasa North	1398 22%	374 18%	491 24%	533 26%
Average	10.2	9.6	11.1	9.9
11.5. Malindi	650 10%	178 8%	169 8%	303 15%
Average	8.5	8.1	8.2	8.9
11.6. Lamu	280 4%	106 5%	77 4%	97 5%
Average	4.7	4.5	4.0	5.5
11.7. Tsavo	1194 19%	374 18%	472 23%	348 17%
Average	1.8	1.6	1.7	2.1
11.8. Amboseli	1008 16%	368 17%	340 17%	300 15%
Average	1.6	1.7	1.6	1.6
11.9. Masai Mara	1884 30%	558 26%	659 32%	667 32%
Average	2.6	2.8	2.5	2.5
11.10. Mt. Kenya	1030 17%	324 15%	361 17%	355 17%
Average	2.8	2.5	2.6	3.3
11.11. Naivasha	1092 18%	302 14%	405 20%	385 19%
Average	2.0	2.2	1.9	2.0
11.12. Baringo & Bogoria	573 9%	162 8%	318 16%	93 5%
Average	2.7	3.7	2.4	1.9
11.13. Western	282 5%	88 4%	96 5%	98 5%
Average	7.7	8.2	5.0	9.8
11.14. Northern	122 2%	38 2%	38 2%	46 2%
Average	9.3	19.9	4.7	4.4
11.15. Tana	27 0%	6 0%	10 0%	11 1%
Average	19.9	4.0	4.6	42.4

Source: "Airport Questionnaire Survey" JICA Study Team

Table A. 29 By Month of Survey (3/4)

	Total	May	July	December
12. Use of camp sites				
Stayed	681 11%	218 10%	218 11%	245 12%
Average	5.5	4.6	6.1	5.9
13. Combined destination				
None	4217 68%	1470 70%	1289 63%	1458 71%
TZ Inland	681 11%	236 11%	248 12%	197 10%
TZ Coast	370 6%	130 6%	138 7%	102 5%
Uganda	274 4%	104 5%	115 6%	55 3%
Zaire	91 1%	16 1%	39 2%	36 2%
Ethiopia	74 1%	34 2%	23 1%	17 1%
Somalia	80 1%	48 2%	19 1%	13 1%
Sudan	27 0%	14 1%	6 0%	7 0%
Egypt	56 1%	26 1%	18 1%	12 1%
Zambia	88 1%	30 1%	35 2%	23 1%
Zimbabwe	330 5%	104 5%	155 8%	71 3%
Malawi	94 2%	38 2%	32 2%	24 1%
Mozambique	28 0%	8 0%	10 0%	10 0%
Madagascar	91 1%	18 1%	47 2%	26 1%
Botswana	23 0%	8 0%	0 0%	15 1%
S. Africa	186 3%	50 2%	76 4%	60 3%
Mauritius	67 1%	32 2%	18 1%	17 1%
Seychelles	92 1%	18 1%	31 2%	43 2%
Other Africa	168 3%	56 3%	77 4%	35 2%
Others	284 5%	120 6%	100 5%	64 3%
Improvement needs score				
14. Score for Security	2.4	2.5	2.4	2.5
15. Beach boys	2.7	2.7	2.7	2.7
16. Entertainment	2.1	2.1	2.1	2.0
17. Foods	1.9	1.9	1.8	2.0
18. Hotel	1.7	1.7	1.6	1.7
19. Contact w/locals	2.1	2.1	2.0	2.1
20. Shopping	2.0	2.0	2.0	2.1
21. Environment	2.8	2.8	2.8	2.8
22. Information	2.2	2.2	2.1	2.3
23. Local cultures	2.1	2.1	2.1	2.2
24. Tour operator	1.9	1.9	1.8	2.0
25. Public transport	2.5	2.5	2.4	2.7
26. Total expenditure				
Less than 1000	467 23%	-	-	467 23%
1000-2000	446 22%	-	-	446 22%
2000-3000	411 20%	-	-	411 20%
3000-4000	213 10%	-	-	213 10%
4000-5000	70 3%	-	-	70 3%
5000-6000	50 2%	-	-	50 2%
6000 & over	109 5%	-	-	109 5%
Average	2,466	-	-	2,466
27. Expenditure in Kenya				
Less than \$500	1004 49%	-	-	1004 49%
500-1000	411 20%	-	-	411 20%
1000-1500	148 7%	-	-	148 7%
1500-2000	85 4%	-	-	85 4%
2000-2500	34 2%	-	-	34 2%
2500-3000	17 1%	-	-	17 1%
\$3000 & over	65 3%	-	-	65 3%
Average	747	-	-	747
28. Shopping in Kenya				
Less than \$100	955 46%	-	-	955 46%
100-200	327 16%	-	-	327 16%
200-300	139 7%	-	-	139 7%
300-500	184 9%	-	-	184 9%
500-700	86 4%	-	-	86 4%
700-1000	25 1%	-	-	25 1%
\$1000 & over	45 2%	-	-	45 2%
Average	200	-	-	200

Source: "Airport Questionnaire Survey" JICA Study Team

Table A. 29 By Month of Survey (4/4)

	Total	May	July	December
29.Revisit				
Interested	5038 81%	1724 82%	1683 82%	1631 79%
Not sure	869 14%	286 14%	277 14%	306 15%
Not interested	252 4%	90 4%	68 3%	94 5%
30.Places for next visit				
Nairobi	1580 25%	578 27%	509 25%	493 24%
Mombasa City	989 16%	354 17%	366 18%	269 13%
Mombasa South	1592 26%	492 23%	561 27%	539 26%
Mombasa North	1112 18%	368 17%	372 18%	372 18%
Malindi	984 16%	338 16%	309 15%	337 16%
Lamu	974 16%	320 15%	316 15%	338 16%
Tsavo	1182 19%	436 21%	405 20%	341 17%
Amboseli	1578 25%	534 25%	574 28%	470 23%
Masai Mara	3107 50%	1046 49%	1034 50%	1027 50%
Mt.Kenya	1557 25%	460 22%	516 25%	581 28%
Naivasha&Nakuru	951 15%	304 14%	304 15%	343 17%
Baringo&Bogoria	901 14%	298 14%	327 16%	276 13%
Western	1419 23%	462 22%	487 24%	470 23%
Northern	1096 18%	356 17%	354 17%	386 19%
Eastern	439 7%	128 6%	115 6%	196 9%
33-34.Age-Sex				
Male -30	956 15%	304 14%	373 18%	279 14%
Male 30-40	1061 17%	418 20%	333 16%	310 15%
Male 40-50	974 16%	380 18%	279 14%	315 15%
Male 50-60	598 10%	224 11%	206 10%	168 8%
Male 60-	235 4%	80 4%	68 3%	87 4%
Female -30	883 14%	262 12%	324 16%	297 14%
Female 30-40	609 10%	200 9%	170 8%	239 12%
Female 40-50	479 8%	122 6%	149 7%	208 10%
Female 50-60	194 3%	58 3%	67 3%	69 3%
Female 60-	65 1%	22 1%	17 1%	26 1%
35a.Origin area				
Africa	443 7%	176 8%	152 7%	115 6%
Europe	4529 73%	1510 71%	1441 70%	1578 76%
North America	818 13%	298 14%	303 15%	217 11%
Near&Middle East	39 1%	12 1%	15 1%	12 1%
South Asia	55 1%	32 2%	16 1%	7 0%
East Asia	110 2%	28 1%	27 1%	55 3%
Oceania	198 3%	50 2%	81 4%	67 3%
Others	22 0%	2 0%	10 0%	10 0%
35b.Origin country				
UK	1462 23%	436 21%	461 22%	565 27%
Germany	1158 19%	350 17%	445 22%	363 18%
France	550 9%	284 13%	108 5%	158 8%
Italy	365 6%	76 4%	70 3%	219 11%
Switzerland	186 3%	52 2%	62 3%	72 3%
USA	696 11%	244 12%	274 13%	178 9%
South Africa	192 3%	84 4%	54 3%	54 3%
Australia	173 3%	36 2%	76 4%	61 3%
Others	1442 23%	552 26%	494 24%	396 19%
36.Marital status				
Single	2321 37%	774 37%	781 38%	766 37%
Married	3524 57%	1230 58%	1159 57%	1135 55%
Others	372 6%	108 5%	106 5%	158 8%
Survey				
May	2114 34%	2114 100%	0 0%	0 0%
July	2050 33%	0 0%	2050 100%	0 0%
December	2066 33%	0 0%	0 0%	2066 100%

Source: "Airport Questionnaire Survey" JICA Study Team

Table A. 30 By Purpose of Visit (1/4)

	Total	Holiday	VFR	Incentive	Conference	Business	Others
Total	6230100%	4433100%	598100%	58100%	231100%	744100%	137100%
01. Experience of Kenya							
First	3845 62%	3231 73%	229 38%	28 48%	127 55%	230 31%	73 53%
Second	807 13%	536 12%	123 21%	9 16%	27 12%	112 15%	14 10%
Third	360 6%	216 5%	49 8%	2 3%	20 9%	73 10%	17 12%
Fourth	215 3%	115 3%	41 7%	1 2%	4 2%	54 7%	4 3%
5-9 times	333 5%	154 3%	68 11%	3 5%	19 8%	89 12%	13 9%
More than 10 times	410 7%	146 3%	57 10%	15 26%	28 12%	164 22%	12 9%
Average	3.1	2.1	4.3	5.6	3.7	7.8	3.3
02. Travel companion							
Alone	1579 25%	652 15%	267 45%	27 47%	132 57%	501 67%	61 45%
Spouse	1765 28%	1597 36%	106 18%	11 19%	13 6%	38 5%	19 14%
Family	1051 17%	907 20%	125 21%	1 2%	6 3%	12 2%	10 7%
Family & friends	225 4%	200 5%	16 3%	1 2%	2 1%	6 1%	6 4%
Family & relatives	151 2%	129 3%	16 3%	2 3%	2 1%	2 0%	0 0%
Friend(s)	936 15%	819 18%	62 10%	7 12%	20 9%	28 4%	18 13%
Business associate(s)	252 4%	45 1%	4 1%	6 10%	46 20%	151 20%	5 4%
Others	94 2%	75 2%	2 0%	3 5%	9 4%	5 1%	18 13%
03. Whole itinerary							
1-4 nights	175 3%	52 1%	9 2%	3 5%	22 10%	89 12%	5 4%
5-9 nights	1153 19%	845 19%	39 7%	17 29%	76 33%	176 24%	24 18%
10-14 nights	2019 32%	1659 37%	131 22%	9 16%	52 23%	168 23%	24 18%
15-19 nights	846 14%	667 15%	79 13%	10 17%	33 14%	57 8%	13 9%
20-24 nights	857 14%	636 14%	134 22%	5 9%	18 8%	64 9%	11 8%
25-29 nights	202 3%	120 3%	52 9%	1 2%	5 2%	24 3%	1 1%
30-59 nights	459 7%	261 6%	92 15%	4 7%	16 7%	86 12%	27 20%
More than 60 nights	278 4%	151 3%	48 8%	6 10%	6 3%	67 9%	30 22%
Average length	23.0	19.6	30.1	40.3	17.3	32.4	46
04. Nights in Kenya							
1-4 nights	552 9%	224 5%	39 7%	9 16%	39 17%	241 32%	17 12%
5-9 nights	1616 26%	1168 26%	79 13%	27 47%	95 41%	247 33%	30 22%
10-14 nights	2149 34%	1831 41%	151 25%	7 12%	56 24%	104 14%	25 18%
15-19 nights	614 10%	460 10%	90 15%	4 7%	16 7%	44 6%	10 7%
20-24 nights	637 10%	504 11%	99 17%	3 5%	11 5%	20 3%	10 7%
25-29 nights	143 2%	89 2%	38 6%	0 0%	4 2%	12 2%	2 1%
More than 30 nights	342 5%	150 3%	101 17%	7 12%	10 4%	74 10%	43 31%
Average	15.7	13.9	21.6	20.6	10.7	17.5	38.7
05. Tourist type							
Holiday	4433 71%	4433100%	0 0%	0 0%	0 0%	0 0%	0 0%
VFR	598 10%	0 0%	598100%	0 0%	0 0%	0 0%	0 0%
Incentive	58 1%	0 0%	0 0%	58100%	0 0%	0 0%	0 0%
Conference	231 4%	0 0%	0 0%	0 0%	231100%	0 0%	0 0%
Business	744 12%	0 0%	0 0%	0 0%	0 0%	744100%	0 0%
Others	137 2%	0 0%	0 0%	0 0%	0 0%	0 0%	137100%
06. Competitor destinations							
Mediterranean	574 13%	574 13%	-	-	-	-	-
Other Europe	198 4%	198 4%	-	-	-	-	-
Caribbean	853 19%	853 19%	-	-	-	-	-
C.&S. America	237 5%	237 5%	-	-	-	-	-
North America	202 5%	202 5%	-	-	-	-	-
N.&M. East	57 1%	57 1%	-	-	-	-	-
North Africa	185 4%	185 4%	-	-	-	-	-
Sub-Saharan	190 4%	190 4%	-	-	-	-	-
South Asia	163 4%	163 4%	-	-	-	-	-
Southeast Asia	283 6%	283 6%	-	-	-	-	-
East Asia	94 2%	94 2%	-	-	-	-	-
Oceania & Pacific	128 3%	128 3%	-	-	-	-	-
Indian Ocean	186 4%	186 4%	-	-	-	-	-
Others	212 5%	212 5%	-	-	-	-	-
None	871 20%	871 20%	-	-	-	-	-

Source: "Airport Questionnaire Survey" JICA Study Team

Table A.30 By Purpose of Visit (2/4)

	Total	Holiday	VFR	Incentive	Conference	Business	Others
07. Kenya's strength							
Lower price	558 13%	558 13%	-	-	-	-	-
Travel time	247 6%	247 6%	-	-	-	-	-
Security	60 1%	60 1%	-	-	-	-	-
Tourist attractions	1868 42%	1868 42%	-	-	-	-	-
Tourist services	132 3%	132 3%	-	-	-	-	-
Shopping	17 0%	17 0%	-	-	-	-	-
Relaxing atmosphere	447 10%	447 10%	-	-	-	-	-
Others	1011 23%	1011 23%	-	-	-	-	-
08. Influential media							
Travel agent	1811 41%	1811 41%	-	-	-	-	-
Brochures	817 18%	817 18%	-	-	-	-	-
Advertisement	442 10%	442 10%	-	-	-	-	-
Magazines/newspapers	454 10%	454 10%	-	-	-	-	-
Friends	1579 36%	1579 36%	-	-	-	-	-
Kenya tourist office	74 2%	74 2%	-	-	-	-	-
Others	448 10%	448 10%	-	-	-	-	-
09. Principal attractions							
Beach	1831 41%	1831 41%	-	-	-	-	-
Diving	479 11%	479 11%	-	-	-	-	-
Entertainment	227 5%	227 5%	-	-	-	-	-
Fishing	104 2%	104 2%	-	-	-	-	-
Food	390 9%	390 9%	-	-	-	-	-
Golf	67 2%	67 2%	-	-	-	-	-
History & culture	819 18%	819 18%	-	-	-	-	-
Mountain climbing	98 2%	98 2%	-	-	-	-	-
Nature & wildlife	3505 79%	3505 79%	-	-	-	-	-
Shopping	265 6%	265 6%	-	-	-	-	-
Sports	64 1%	64 1%	-	-	-	-	-
Others	196 4%	196 4%	-	-	-	-	-
10. Package tour							
Used a packaged holiday	2622 42%	2453 55%	42 7%	20 34%	34 15%	41 6%	27 20%
Purchased tour(s) in Kenya	420 7%	302 7%	45 8%	5 9%	23 10%	35 5%	10 7%
Not used	3121 50%	1633 37%	498 83%	33 57%	174 75%	663 89%	99 72%
11. Places stayed							
11.1. Nairobi	3651 59%	2054 46%	509 85%	47 81%	218 94%	688 92%	114 83%
Average nights spent	7.2	4.5	12.3	7.8	8.3	9.0	18.9
11.2. Mombasa City	754 12%	541 12%	95 16%	11 19%	11 5%	69 9%	21 15%
Average	6.5	6.0	10.0	1.7	4.7	7.3	2.7
11.3. Mombasa South	1720 28%	1475 33%	136 23%	8 14%	13 6%	52 7%	26 19%
Average	10.0	10.0	9.9	5.1	4.8	5.5	22.5
11.4. Mombasa North	1398 22%	1204 27%	93 16%	15 26%	8 3%	52 7%	24 18%
Average	10.2	10.8	8.8	4.7	4.8	4.9	5.9
11.5. Malindi	650 10%	563 13%	51 9%	3 5%	3 1%	17 2%	11 8%
Average	8.5	8.8	7.7	1.7	4.3	4.2	4.5
11.6. Lamu	280 4%	222 5%	33 6%	4 7%	1 0%	14 2%	3 2%
Average	4.7	4.6	5.0	3.8	4.0	3.4	3.0
11.7. Tsavo	1194 19%	1099 25%	42 7%	5 9%	8 3%	20 3%	15 11%
Average	1.8	1.7	2.0	1.2	1.9	1.6	1.5
11.8. Amboseli	1008 16%	929 21%	30 5%	9 16%	10 4%	12 2%	15 11%
Average	1.6	1.6	2.0	1.6	1.5	2.0	1.6
11.9. Masai Mara	1884 30%	1575 36%	128 21%	16 28%	33 14%	79 11%	42 31%
Average	2.6	2.4	3.1	2.2	2.8	6.3	2.3
11.10. Mt. Kenya	1030 17%	790 18%	116 19%	14 24%	26 11%	61 8%	19 14%
Average	2.8	2.7	3.0	2.6	3.5	2.2	3.0
11.11. Naivasha	1092 18%	878 20%	109 18%	14 24%	15 6%	53 7%	17 12%
Average	2.0	1.8	3.3	1.7	1.5	1.9	3.9
11.12. Baringo & Bogoria	573 9%	474 11%	38 6%	6 10%	18 8%	16 2%	19 14%
Average	2.7	2.4	2.7	5.2	2.7	2.8	8.7
11.13. Western	282 5%	162 4%	60 10%	2 3%	3 1%	36 5%	14 10%
Average	7.7	5.3	7.5	2.0	10.0	9.4	16.0
11.14. Northern	122 2%	86 2%	18 3%	4 7%	0 0%	6 1%	8 6%
Average	9.3	4.3	5.2	120.5	-	1.8	23.4
11.15. Eastern	27 0%	14 0%	7 1%	0 0%	0 0%	1 0%	2 1%
Average	19.9	3.3	37.4	-	-	10.0	2.0

Source: "Airport Questionnaire Survey" JICA Study Team

Table A. 30 By Purpose of Visit (3/4)

	Total	Holiday	VFR	Incentive	Conference	Business	Others
12. Use of camp site							
12. Stayed	681 11%	494 11%	91 15%	12 21%	15 6%	39 5%	24 18%
Average nights spent	5.5	5.3	6	4.1	4.9	8	5
13. Combined destination							
None	4217 68%	3266 74%	373 62%	32 55%	143 62%	325 44%	66 48%
TZ Inland	681 11%	493 11%	49 8%	10 17%	15 6%	92 12%	20 15%
TZ Coast	370 6%	235 5%	45 8%	4 7%	8 3%	69 9%	7 5%
Uganda	274 4%	125 3%	28 5%	7 12%	6 3%	96 13%	12 9%
Zaire	91 1%	50 1%	8 1%	7 12%	2 1%	20 3%	1 1%
Ethiopia	74 1%	28 1%	6 1%	3 5%	7 3%	24 3%	5 4%
Somalia	80 1%	13 0%	4 1%	0 0%	0 0%	50 7%	11 8%
Sudan	27 0%	10 0%	4 1%	0 0%	0 0%	11 1%	2 1%
Egypt	56 1%	40 1%	5 1%	0 0%	2 1%	8 1%	1 1%
Zambia	88 1%	57 1%	9 2%	2 3%	4 2%	16 2%	0 0%
Zimbabwe	330 5%	215 5%	40 7%	1 2%	15 6%	57 8%	1 1%
Malawi	94 2%	64 1%	11 2%	0 0%	1 0%	16 2%	2 1%
Mozambique	28 0%	13 0%	8 1%	0 0%	1 0%	6 1%	0 0%
Madagascar	91 1%	60 1%	4 1%	4 7%	3 1%	14 2%	6 4%
Botswana	23 0%	17 0%	2 0%	0 0%	0 0%	4 1%	0 0%
S. Africa	186 3%	90 2%	20 3%	2 3%	9 4%	61 8%	4 3%
Mauritius	67 1%	46 1%	7 1%	0 0%	2 1%	12 2%	0 0%
Seychelles	92 1%	81 2%	3 1%	1 2%	0 0%	7 1%	0 0%
Other Africa	168 3%	62 1%	13 2%	4 7%	12 5%	63 8%	12 9%
Others	284 5%	135 3%	35 6%	2 3%	29 13%	59 8%	22 16%
Improvement needs score							
14. Score for Security	2.4	2.3	2.8	2.7	2.9	2.8	2.6
15. Beach boys	2.7	2.8	2.7	2.6	2.7	2.6	2.6
16. Entertainment	2.1	2.1	1.9	2.0	2.0	2.0	2.0
17. Foods	1.9	1.9	1.8	2.2	1.9	1.8	1.8
18. Hotel	1.7	1.7	1.6	1.9	1.8	1.7	1.8
19. Contact w/locals	2.1	2.1	1.9	2.5	2.3	2.1	1.9
20. Shopping	2.0	2.1	1.9	2.1	1.9	2.0	1.8
21. Environment	2.8	2.8	2.9	2.6	2.7	2.9	2.8
22. Information	2.2	2.2	2.2	2.2	2.0	2.1	2.0
23. Local cultures	2.1	2.1	2.0	2.4	2.4	2.1	1.9
24. Tour operator	1.9	1.9	2.0	2.0	1.9	2.0	1.9
25. Public transport	2.5	2.5	2.8	2.5	2.3	2.5	2.5
26. Total expenditure							
Less than 1000	501 24%	350 22%	125 36%	5 42%	5 45%	13 19%	0 0%
1000-2000	462 22%	395 25%	47 14%	3 25%	1 9%	12 17%	1 100%
2000-3000	420 20%	350 22%	47 14%	0 0%	1 9%	13 19%	0 0%
3000-4000	219 11%	193 12%	17 5%	1 8%	1 9%	6 9%	0 0%
4000-5000	72 3%	58 4%	8 2%	1 8%	0 0%	3 4%	0 0%
5000-6000	52 3%	35 2%	14 4%	0 0%	0 0%	2 3%	0 0%
6000 & over	116 6%	89 6%	15 4%	1 8%	1 9%	8 12%	0 0%
Average	2,460	2,458	2,275	3,065	2,131	3,217	1,118
27. Expenditure in Kenya							
Less than \$500	1039 50%	842 53%	152 44%	6 50%	6 55%	22 32%	1 100%
500-1000	414 20%	337 21%	52 15%	3 25%	2 18%	15 22%	0 0%
1000-1500	150 7%	111 7%	30 9%	1 8%	0 0%	5 7%	0 0%
1500-2000	86 4%	68 4%	10 3%	1 8%	1 9%	5 7%	0 0%
2000-2500	34 2%	26 2%	6 2%	0 0%	0 0%	1 1%	0 0%
2500-3000	17 1%	11 1%	5 1%	0 0%	0 0%	0 0%	0 0%
\$3000 & over	69 3%	48 3%	12 3%	1 8%	1 9%	7 10%	0 0%
Average	746	688	941	1,033	1,422	1,166	10
28. Shopping in Kenya							
Less than \$100	927 45%	731 46%	147 43%	7 58%	6 55%	26 38%	1 100%
100-200	335 16%	274 17%	40 12%	3 25%	0 0%	13 19%	0 0%
200-300	142 7%	108 7%	30 9%	0 0%	0 0%	2 3%	0 0%
300-500	185 9%	152 9%	22 6%	1 8%	1 9%	4 6%	0 0%
500-700	90 4%	73 5%	13 4%	1 8%	1 9%	2 3%	0 0%
700-1000	27 1%	24 1%	3 1%	0 0%	0 0%	0 0%	0 0%
\$1000 & over	51 2%	26 2%	16 5%	0 0%	1 9%	7 10%	0 0%
Average	212	189	285	113	508	416	10

Source: "Airport Questionnaire Survey" JICA Study Team

Table A. 30 By Purpose of Visit (4/4)

	Total	Holiday	VFR	Incentive	Conference	Business	Others
29.Revisit							
Interested	5038 81%	3493 79%	503 84%	48 83%	196 85%	670 90%	104 76%
Not sure	869 14%	684 15%	73 12%	6 10%	31 13%	51 7%	22 16%
Not interested	252 4%	212 5%	13 2%	3 5%	4 2%	12 2%	8 6%
30.Places for next visit							
Nairobi	1580 25%	1005 23%	219 37%	14 24%	50 22%	244 33%	38 28%
Mombasa City	989 16%	523 12%	126 21%	10 17%	79 34%	201 27%	42 31%
Mombasa South	1592 26%	1074 24%	176 29%	7 12%	55 24%	236 32%	32 23%
Mombasa North	1112 18%	748 17%	120 20%	4 7%	33 14%	169 23%	30 22%
Malindi	984 16%	717 16%	109 18%	11 19%	25 11%	85 11%	33 24%
Lamu	974 16%	646 15%	135 23%	7 12%	34 15%	120 16%	26 19%
Tsavo	1182 19%	889 20%	111 19%	6 10%	40 17%	102 14%	31 23%
Amboseli	1578 25%	1231 28%	110 18%	18 31%	54 23%	124 17%	34 25%
Masai Mara	3107 50%	2312 52%	283 47%	25 43%	95 41%	314 42%	67 49%
Mt.Kenya	1557 25%	1084 24%	203 34%	7 12%	42 18%	175 24%	37 27%
Naivasha&Nakuru	951 15%	640 14%	131 22%	7 12%	31 13%	109 15%	23 17%
Baringo&Bogoria	901 14%	627 14%	110 18%	6 10%	22 10%	111 15%	23 17%
Western	1419 23%	1058 24%	133 22%	11 19%	48 21%	124 17%	38 28%
Northern	1096 18%	775 17%	125 21%	7 12%	36 16%	110 15%	36 26%
Eastern	439 7%	305 7%	57 10%	3 5%	7 3%	52 7%	10 7%
33-34.Age-Sex							
Male -30	956 15%	726 16%	111 19%	8 14%	19 8%	65 9%	20 15%
Male 30-40	1061 17%	676 15%	82 14%	6 10%	55 24%	212 28%	29 21%
Male 40-50	974 16%	639 14%	42 7%	15 26%	52 23%	214 29%	11 8%
Male 50-60	598 10%	404 9%	34 6%	4 7%	32 14%	110 15%	12 9%
Male 60-	235 4%	166 4%	25 4%	3 5%	12 5%	22 3%	7 5%
Female -30	883 14%	692 16%	108 18%	9 16%	9 4%	27 4%	30 22%
Female 30-40	609 10%	457 10%	77 13%	4 7%	19 8%	38 5%	11 8%
Female 40-50	479 8%	381 9%	42 7%	5 9%	14 6%	27 4%	8 6%
Female 50-60	194 3%	142 3%	23 4%	0 0%	9 4%	15 2%	4 3%
Female 60-	65 1%	38 1%	17 3%	2 3%	4 2%	1 0%	2 1%
35a.Origin area							
Africa	443 7%	178 4%	54 9%	5 9%	69 30%	116 16%	19 14%
Europe	4529 73%	3572 81%	385 64%	44 76%	66 29%	383 51%	63 46%
North America	818 13%	420 9%	111 19%	6 10%	68 29%	160 22%	46 34%
Near&Middle East	39 1%	24 1%	4 1%	0 0%	2 1%	8 1%	1 1%
South Asia	55 1%	22 0%	7 1%	0 0%	2 1%	20 3%	4 3%
East Asia	110 2%	64 1%	10 2%	0 0%	4 2%	28 4%	3 2%
Oceania	198 3%	134 3%	26 4%	3 5%	10 4%	24 3%	0 0%
Others	22 0%	12 0%	1 0%	0 0%	7 3%	0 0%	1 1%
35b.Origin country							
UK	1462 23%	1008 23%	205 34%	6 10%	22 10%	206 28%	11 8%
Germany	1158 19%	1045 24%	41 7%	1 2%	5 2%	48 6%	14 10%
France	550 9%	484 11%	16 3%	23 40%	5 2%	7 1%	15 11%
Italy	365 6%	320 7%	17 3%	4 7%	2 1%	15 2%	5 4%
Switzerland	186 3%	151 3%	13 2%	2 3%	5 2%	13 2%	2 1%
USA	696 11%	370 8%	73 12%	5 9%	63 27%	133 18%	46 34%
South Africa	192 3%	80 2%	34 6%	0 0%	9 4%	66 9%	3 2%
Australia	173 3%	120 3%	17 3%	1 2%	10 4%	24 3%	0 0%
Others	1442 23%	854 19%	182 30%	16 28%	109 47%	230 31%	41 30%
36.Marital status							
Single	2321 37%	1606 36%	291 49%	24 41%	71 31%	244 33%	70 51%
Married	3524 57%	2548 57%	258 43%	29 50%	152 66%	470 63%	55 40%
Others	372 6%	269 6%	48 8%	5 9%	8 3%	30 4%	12 9%
Survey							
May	2114 34%	1326 30%	134 22%	32 55%	128 55%	410 55%	84 61%
July	2050 33%	1506 34%	119 20%	14 24%	92 40%	265 36%	52 38%
December	2066 33%	1601 36%	345 58%	12 21%	11 5%	69 9%	1 1%

Source: "Airport Questionnaire Survey" JICA Study Team

Table A. 31 By Visitors' Origin Region - Tourists (1/4)

	Total	Africa	Europe	North America	Oceania	N.&M. East	East Asia
Total	4433100%	178100%	3572100%	420100%	134100%	24100%	64100%
01. Experience of Kenya							
First	3231 73%	91 51%	2662 75%	304 72%	88 66%	17 71%	48 75%
Second	536 12%	31 17%	400 11%	61 15%	26 19%	1 4%	8 13%
Third	216 5%	20 11%	152 4%	19 5%	16 12%	1 4%	2 3%
Fourth	115 3%	6 3%	90 3%	11 3%	3 2%	0 0%	3 5%
5-9 times	154 3%	15 8%	123 3%	11 3%	1 1%	1 4%	1 2%
More than 10 times	146 3%	13 7%	114 3%	12 3%	0 0%	4 17%	2 3%
Average	2.1	4.6	2.0	2.1	1.5	4.5	2.4
02. Travel companion							
Alone	652 15%	43 24%	435 12%	99 24%	39 29%	8 33%	14 22%
Spouse	1597 36%	42 24%	1378 39%	118 28%	39 29%	2 8%	12 19%
Family	907 20%	45 25%	731 20%	74 18%	24 18%	6 25%	19 30%
Family & friends	200 5%	5 3%	160 4%	30 7%	1 1%	0 0%	0 0%
Family & relatives	129 3%	5 3%	101 3%	19 5%	1 1%	0 0%	1 2%
Friend(s)	819 18%	25 14%	675 19%	67 16%	29 22%	7 29%	11 17%
Business associate(s)	45 1%	9 5%	25 1%	6 1%	0 0%	1 4%	4 6%
Others	75 2%	3 2%	60 2%	6 1%	1 1%	0 0%	3 5%
03. Whole itinerary							
1-4 nights	52 1%	17 10%	22 1%	6 1%	2 1%	1 4%	2 3%
5-9 nights	845 19%	55 31%	707 20%	42 10%	4 3%	5 21%	27 42%
10-14 nights	1659 37%	46 26%	1450 41%	114 27%	24 18%	3 13%	16 25%
15-19 nights	667 15%	22 12%	540 15%	77 18%	10 7%	6 25%	5 8%
20-24 nights	636 14%	20 11%	509 14%	70 17%	17 13%	2 8%	10 16%
25-29 nights	120 3%	3 2%	91 3%	17 4%	6 4%	0 0%	1 2%
30-59 nights	261 6%	11 6%	139 4%	59 14%	42 31%	4 17%	1 2%
More than 60 nights	151 3%	2 1%	77 2%	33 8%	28 21%	3 13%	2 3%
Average length	19.6	14.8	17.6	30	44	29.5	14.2
04. Nights in Kenya							
1-4 nights	224 5%	28 16%	111 3%	44 10%	11 8%	3 13%	18 28%
5-9 nights	1168 26%	65 37%	884 25%	134 32%	38 28%	7 29%	33 52%
10-14 nights	1831 41%	53 30%	1572 44%	148 35%	42 31%	3 13%	5 8%
15-19 nights	460 10%	13 7%	378 11%	37 9%	16 12%	6 25%	2 3%
20-24 nights	504 11%	14 8%	443 12%	26 6%	13 10%	2 8%	3 5%
25-29 nights	89 2%	3 2%	73 2%	8 2%	3 2%	0 0%	1 2%
More than 30 nights	150 3%	1 1%	106 3%	22 5%	11 8%	3 13%	2 3%
Average	13.9	10.5	14.2	14	14	21.5	8.4
05. Tourist type							
Holiday	4433100%	178100%	3572100%	420100%	134100%	24100%	64100%
VFR	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%
Incentive	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%
Conference	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%
Business	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%
Others	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%
06. Competitor destinations							
Mediterranean	574 13%	23 13%	451 13%	64 15%	28 21%	0 0%	5 8%
Other Europe	198 4%	9 5%	148 4%	26 6%	7 5%	0 0%	8 13%
Caribbean	853 19%	15 8%	785 22%	34 8%	11 8%	1 4%	5 8%
C.&S. America	237 5%	6 3%	183 5%	19 5%	19 14%	6 25%	4 6%
North America	202 5%	4 2%	176 5%	13 3%	5 4%	0 0%	2 3%
N.&M. East	57 1%	1 1%	46 1%	8 2%	0 0%	1 4%	1 2%
North Africa	185 4%	6 3%	144 4%	16 4%	8 6%	2 8%	5 8%
Sub-Saharan	190 4%	14 8%	115 3%	44 10%	10 7%	1 4%	3 5%
South Asia	163 4%	0 0%	143 4%	10 2%	5 4%	2 8%	3 5%
Southeast Asia	283 6%	4 2%	259 7%	9 2%	5 4%	2 8%	2 3%
East Asia	94 2%	0 0%	70 2%	13 3%	4 3%	2 8%	1 2%
Oceania & Pacific	128 3%	6 3%	91 3%	17 4%	8 6%	2 8%	4 6%
Indian Ocean	186 4%	13 7%	156 4%	12 3%	0 0%	1 4%	2 3%
Others	212 5%	23 13%	155 4%	22 5%	8 6%	2 8%	0 0%
None	871 20%	54 30%	650 18%	113 27%	16 12%	2 8%	19 30%

Source: "Airport Questionnaire Survey" JICA Study Team

Table A. 31 By Visitors' Origin Region (2/4)

	Total	Africa	Europe	North America	Oceania	N.&M. East	East Asia
07. Kenya's strength							
Lower price	558 13%	24 13%	494 14%	21 5%	12 9%	3 13%	1 2%
Travel time	247 6%	26 15%	186 5%	10 2%	14 10%	5 21%	3 5%
Security	60 1%	2 1%	47 1%	4 1%	3 2%	0 0%	4 6%
Tourist attractions	1868 42%	51 29%	1442 40%	237 56%	81 60%	8 33%	37 58%
Tourist services	132 3%	8 4%	96 3%	19 5%	5 4%	2 8%	0 0%
Shopping	17 0%	1 1%	7 0%	7 2%	1 1%	0 0%	1 2%
Relaxing atmosphere	447 10%	24 13%	371 10%	26 6%	3 2%	1 4%	12 19%
Others	1011 23%	40 22%	856 24%	84 20%	12 9%	5 21%	4 6%
08. Influential media							
Travel agent	1811 41%	42 24%	1558 44%	140 33%	48 36%	5 21%	15 23%
Brochures	817 18%	12 7%	660 18%	90 21%	40 30%	0 0%	8 13%
Advertisement	442 10%	14 8%	355 10%	34 8%	15 11%	4 17%	14 22%
Magazines/newspapers	454 10%	23 13%	321 9%	64 15%	27 20%	5 21%	14 22%
Friends	1579 36%	67 38%	1221 34%	203 48%	42 31%	9 38%	13 20%
Kenya tourist office	74 2%	3 2%	53 1%	13 3%	3 2%	0 0%	2 3%
Others	448 10%	23 13%	312 9%	72 17%	21 16%	4 17%	9 14%
09. Principal attractions							
Beach	1831 41%	78 44%	1637 46%	76 18%	24 18%	6 25%	3 5%
Diving	479 11%	23 13%	441 12%	9 2%	3 2%	0 0%	2 3%
Entertainment	227 5%	12 7%	190 5%	11 3%	4 3%	3 13%	3 5%
Fishing	104 2%	18 10%	83 2%	1 0%	1 1%	1 4%	0 0%
Food	390 9%	4 2%	361 10%	16 4%	5 4%	1 4%	1 2%
Golf	67 2%	8 4%	51 1%	5 1%	1 1%	0 0%	1 2%
History & culture	819 18%	25 14%	662 19%	81 19%	34 25%	2 8%	9 14%
Mountain climbing	98 2%	6 3%	65 2%	18 4%	5 4%	1 4%	3 5%
Nature & wildlife	3505 79%	91 51%	2863 80%	338 80%	118 88%	17 71%	52 81%
Shopping	265 6%	19 11%	176 5%	40 10%	13 10%	6 25%	8 13%
Sports	64 1%	0 0%	57 2%	6 1%	1 1%	0 0%	0 0%
Others	196 4%	5 3%	160 4%	25 6%	2 1%	1 4%	1 2%
10. Package tour							
Used a packaged holiday	2453 55%	44 25%	2086 58%	219 52%	70 52%	6 25%	23 36%
Purchased tour(s) in Kenya	302 7%	15 8%	190 5%	47 11%	19 14%	7 29%	18 28%
Not used	1633 37%	112 63%	1264 35%	150 36%	45 34%	11 46%	23 36%
11. Places stayed							
11.1 Nairobi	2054 46%	134 75%	1272 36%	405 96%	121 90%	22 92%	62 97%
Average nights spent	4.5	5.3	4.1	4.8	5.4	11.1	4.4
11.2 Mombasa City	541 12%	24 13%	413 12%	62 15%	27 20%	2 8%	5 8%
Average	6.0	4.6	6.1	5.6	3.0	46.5	3.4
11.3 Mombasa South	1475 33%	60 34%	1343 38%	38 9%	20 15%	5 21%	4 6%
Average	10.0	6.2	10.4	6.6	4.2	7.4	4.5
11.4 Mombasa North	1204 27%	38 21%	1101 31%	39 9%	21 16%	1 4%	2 3%
Average	10.8	5.1	11.2	5.5	10.9	6.0	4.5
11.5 Malindi	563 13%	13 7%	506 14%	21 5%	17 13%	2 8%	3 5%
Average	8.8	5.4	9.3	4.4	3.9	4.0	4.0
11.6 Lamu	222 5%	12 7%	164 5%	30 7%	13 10%	1 4%	1 2%
Average	4.6	3.8	4.8	3.9	5.7	5.0	2.0
11.7 Tsavo	1099 25%	19 11%	1042 29%	30 7%	4 3%	1 4%	2 3%
Average	1.7	1.6	1.7	2.0	1.5	1.0	1.0
11.8 Amboseli	929 21%	16 9%	774 22%	92 22%	27 20%	1 4%	16 25%
Average	1.6	1.8	1.6	1.7	2.0	1.0	2.3
11.9 Masai Mara	1575 36%	44 25%	1121 31%	262 62%	81 60%	15 63%	37 58%
Average	2.4	2.7	2.3	2.6	2.6	2.3	2.2
11.10 Mt. Kenya	790 18%	25 14%	487 14%	185 44%	54 40%	9 38%	17 27%
Average	2.7	2.5	2.5	3.2	1.8	2.3	1.8
11.11 Naivasha	878 20%	26 15%	616 17%	128 30%	64 48%	13 54%	23 36%
Average	1.8	2.8	1.8	1.7	1.7	2.5	1.1
11.12 Baringo & Bogoria	474 11%	12 7%	284 8%	123 29%	45 34%	5 21%	3 5%
Average	2.4	1.8	2.7	2.2	2.0	1.6	1.3
11.13 Western	162 4%	4 2%	99 3%	36 9%	17 13%	1 4%	4 6%
Average	5.3	2.2	6.6	3.6	3.5	1.0	1.8
11.14 Northern	86 2%	0 0%	55 2%	15 4%	10 7%	4 17%	2 3%
Average	4.3	0.0	3.3	7.8	4.6	3.0	6.0
11.15 Tana	14 0%	0 0%	10 0%	3 1%	1 1%	0 0%	0 0%
Average	3.3	0.0	3.8	1.0	5.0	0.0	0.0

Source: "Airport Questionnaire Survey" JICA Study Team

Table A. 31 By Visitors' Origin Region (3/4)

	Total	Africa	Europe	North America	Oceania	N&M. East	East Asia
12. Use of camp sites							
Stayed	494 11%	20 11%	318 9%	84 20%	50 37%	4 17%	7 11%
Average	5.3	5.2	4.7	6	8	8.5	3
13. Combined destination							
None	3266 74%	114 64%	2931 82%	141 34%	24 18%	16 67%	22 34%
TZ Inland	493 11%	11 6%	276 8%	127 30%	60 45%	3 13%	10 16%
TZ Coast	235 5%	10 6%	144 4%	43 10%	32 24%	2 8%	2 3%
Uganda	125 3%	7 4%	56 2%	32 8%	26 19%	3 13%	1 2%
Zaire	50 1%	4 2%	18 1%	10 2%	15 11%	2 8%	0 0%
Ethiopia	28 1%	1 1%	8 0%	12 3%	3 2%	1 4%	2 3%
Somalia	13 0%	0 0%	6 0%	5 1%	0 0%	0 0%	0 0%
Sudan	10 0%	0 0%	7 0%	1 0%	2 1%	0 0%	0 0%
Egypt	40 1%	0 0%	19 1%	14 3%	3 2%	1 4%	2 3%
Zambia	57 1%	3 2%	26 1%	10 2%	14 10%	0 0%	2 3%
Zimbabwe	215 5%	8 4%	81 2%	42 10%	75 56%	0 0%	7 11%
Malawi	64 1%	8 4%	35 1%	4 1%	15 11%	0 0%	1 2%
Mozambique	13 0%	0 0%	9 0%	1 0%	2 1%	0 0%	1 2%
Madagascar	60 1%	4 2%	27 1%	22 5%	6 4%	0 0%	1 2%
Botswana	17 0%	3 2%	10 0%	0 0%	4 3%	0 0%	0 0%
S. Africa	90 2%	11 6%	31 1%	16 4%	19 14%	0 0%	4 6%
Mauritius	46 1%	1 1%	37 1%	1 0%	2 1%	0 0%	4 6%
Seychelles	81 2%	4 2%	41 1%	26 6%	4 3%	1 4%	2 3%
Other Africa	62 1%	8 4%	34 1%	12 3%	5 4%	0 0%	2 3%
Others	135 3%	4 2%	34 1%	66 16%	10 7%	3 13%	16 25%
Improvement needs score							
14. Score for Security	2.3	2.6	2.2	2.3	2.7	2.7	3.0
15. Beach boys	2.8	2.9	2.8	2.7	2.8	3.0	2.7
16. Entertainment	2.1	1.9	2.1	1.9	2.1	1.7	2.2
17. Foods	1.9	1.8	1.9	1.8	2.0	1.7	2.2
18. Hotel	1.7	1.6	1.7	1.7	1.8	1.6	2.0
19. Contact w/locals	2.1	2.0	2.1	2.0	2.1	1.9	2.2
20. Shopping	2.1	2.2	2.1	1.9	2.0	2.0	2.3
21. Environment	2.8	2.5	2.8	2.7	2.9	2.8	2.9
22. Information	2.2	2.0	2.2	2.2	2.3	2.0	2.4
23. Local cultures	2.1	2.2	2.2	2.0	2.2	1.8	2.4
24. Tour operator	1.9	1.8	1.9	1.7	1.8	1.9	2.1
25. Public transport	2.5	2.4	2.5	2.3	2.4	2.2	2.9
26. Total expenditure							
Less than 1000	329 21%	12 18%	304 24%	6 4%	4 9%	0 0%	3 7%
1000-2000	382 24%	18 26%	340 27%	10 7%	4 9%	1 10%	3 7%
2000-3000	344 21%	10 15%	299 23%	16 12%	9 19%	4 40%	5 12%
3000-4000	190 12%	3 4%	145 11%	23 17%	5 11%	2 20%	9 21%
4000-5000	56 3%	1 1%	31 2%	14 10%	4 9%	0 0%	5 12%
5000-6000	33 2%	2 3%	12 1%	14 10%	2 4%	0 0%	2 5%
6000 & over	84 5%	3 4%	28 2%	37 27%	10 21%	2 20%	2 5%
Average	2,464	2,513	2,074	4,792	5,352	5,551	3,078
27. Expenditure in Kenya							
Less than \$500	821 51%	16 24%	724 57%	54 40%	12 26%	2 20%	11 26%
500-1000	335 21%	20 29%	274 21%	18 13%	9 19%	2 20%	9 21%
1000-1500	110 7%	7 10%	70 5%	19 14%	6 13%	2 20%	4 9%
1500-2000	67 4%	1 1%	43 3%	12 9%	3 6%	1 10%	4 9%
2000-2500	26 2%	1 1%	18 1%	4 3%	2 4%	1 10%	0 0%
2500-3000	11 1%	0 0%	6 0%	3 2%	2 4%	0 0%	0 0%
\$3000 & over	46 3%	3 4%	23 2%	8 6%	6 13%	1 10%	1 2%
Average	687	948	602	934	1,412	1,907	836
28. Shopping in Kenya							
Less than \$100	772 48%	21 31%	681 53%	45 33%	14 30%	3 30%	4 9%
100-200	267 17%	8 12%	210 16%	27 20%	13 28%	2 20%	3 7%
200-300	107 7%	10 15%	59 5%	17 13%	6 13%	0 0%	13 30%
300-500	151 9%	2 3%	132 10%	10 7%	0 0%	2 20%	4 9%
500-700	71 4%	2 3%	45 4%	12 9%	5 11%	1 10%	4 9%
700-1000	22 1%	3 4%	17 1%	1 1%	1 2%	0 0%	0 0%
\$1000 & over	25 2%	2 3%	14 1%	5 4%	1 2%	1 10%	1 2%
Average	181	324	166	222	208	268	266

Source: "Airport Questionnaire Survey" JICA Study Team

Table A. 31 By Visitors' Origin Region (4/4)

	Total	Africa	Europe	North America	Oceania	N&M. East	East Asia
29.Revisit							
Interested	3493 79%	142 80%	2815 79%	330 79%	97 72%	18 75%	58 91%
Not sure	684 15%	26 15%	550 15%	67 16%	25 19%	5 21%	5 8%
Not interested	212 5%	9 5%	167 5%	21 5%	12 9%	1 4%	1 2%
30.Places for next visit							
Nairobi	1005 23%	33 19%	842 24%	88 21%	16 12%	4 17%	9 14%
Mombasa City	523 12%	36 20%	321 9%	106 25%	25 19%	5 21%	15 23%
Mombasa South	1074 24%	51 29%	832 23%	122 29%	28 21%	9 38%	23 36%
Mombasa North	748 17%	33 19%	549 15%	94 22%	37 28%	7 29%	16 25%
Malindi	717 16%	23 13%	613 17%	51 12%	20 15%	3 13%	3 5%
Lamu	646 15%	22 12%	500 14%	80 19%	25 19%	4 17%	8 13%
Tsavo	889 20%	23 13%	731 20%	97 23%	25 19%	0 0%	9 14%
Amboseli	1231 28%	22 12%	1017 28%	112 27%	49 37%	4 17%	18 28%
Masai Mara	2312 52%	65 37%	1911 53%	228 54%	49 37%	10 42%	30 47%
Mt.Kenya	1084 24%	45 25%	801 22%	148 35%	42 31%	10 42%	20 31%
Naivasha&Nakuru	640 14%	15 8%	515 14%	65 15%	17 13%	1 4%	15 23%
Baringo&Bogoria	627 14%	18 10%	497 14%	81 19%	14 10%	2 8%	9 14%
Western	1058 24%	25 14%	884 25%	108 26%	19 14%	3 13%	9 14%
Northern	775 17%	24 13%	626 18%	76 18%	20 15%	4 17%	14 22%
Eastern	305 7%	4 2%	249 7%	34 8%	11 8%	1 4%	3 5%
33-34.Age-Sex							
Male -30	726 16%	28 16%	586 16%	56 13%	27 20%	4 17%	16 25%
Male 30-40	676 15%	35 20%	531 15%	57 14%	22 16%	8 33%	12 19%
Male 40-50	639 14%	25 14%	532 15%	53 13%	8 6%	3 13%	11 17%
Male 50-60	404 9%	9 5%	329 9%	45 11%	11 8%	2 8%	5 8%
Male 60-	166 4%	7 4%	125 3%	26 6%	5 4%	0 0%	2 3%
Female -30	692 16%	29 16%	577 16%	42 10%	31 23%	4 17%	8 13%
Female 30-40	457 10%	23 13%	383 11%	32 8%	10 7%	0 0%	7 11%
Female 40-50	381 9%	15 8%	310 9%	39 9%	7 5%	3 13%	3 5%
Female 50-60	142 3%	5 3%	105 3%	28 7%	4 3%	0 0%	0 0%
Female 60-	38 1%	1 1%	24 1%	11 3%	1 1%	0 0%	0 0%
35a.Origin area							
Africa	178 4%	178 100%	0 0%	0 0%	0 0%	0 0%	0 0%
Europe	3572 81%	0 0%	3572 100%	0 0%	0 0%	0 0%	0 0%
North America	420 9%	0 0%	0 0%	420 100%	0 0%	0 0%	0 0%
Near&Middle East	24 1%	0 0%	0 0%	0 0%	0 0%	24 100%	0 0%
South Asia	22 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%
East Asia	64 1%	0 0%	0 0%	0 0%	0 0%	0 0%	64 100%
Oceania	134 3%	0 0%	0 0%	0 0%	134 100%	0 0%	0 0%
Others	12 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%
35b.Origin country							
UK	1008 23%	0 0%	1008 28%	0 0%	0 0%	0 0%	0 0%
Germany	1045 24%	0 0%	1045 29%	0 0%	0 0%	0 0%	0 0%
France	484 11%	0 0%	484 14%	0 0%	0 0%	0 0%	0 0%
Italy	320 7%	0 0%	320 9%	0 0%	0 0%	0 0%	0 0%
Switzerland	151 3%	0 0%	151 4%	0 0%	0 0%	0 0%	0 0%
USA	370 8%	0 0%	0 0%	370 88%	0 0%	0 0%	0 0%
South Africa	80 2%	80 45%	0 0%	0 0%	0 0%	0 0%	0 0%
Australia	120 3%	0 0%	0 0%	0 0%	120 90%	0 0%	0 0%
Others	854 19%	98 55%	564 16%	50 12%	14 10%	24 100%	64 100%
36.Marital status							
Single	1606 36%	61 34%	1249 35%	177 42%	71 53%	11 46%	28 44%
Married	2548 57%	113 63%	2081 58%	222 53%	56 42%	13 54%	34 53%
Others	269 6%	4 2%	235 7%	21 5%	5 4%	0 0%	2 3%
Survey							
May	1326 30%	66 37%	1102 31%	98 23%	32 24%	8 33%	6 9%
July	1506 34%	44 25%	1190 33%	186 44%	55 41%	6 25%	15 23%
December	1601 36%	68 38%	1280 36%	136 32%	47 35%	10 42%	43 67%

Source: "Airport Questionnaire Survey" JICA Study Team

Table A. 32 By Tourist Origin Country - Tourists (1/4)

	Total	UK	Germany	France	Italy	Switzerland	USA	South Africa	Australia
Total	4433100%	1008100%	1045100%	484100%	320100%	151100%	370100%	80100%	120100%
01. Experience of Kenya									
First	3231 73%	734 73%	789 76%	411 85%	218 68%	84 56%	270 73%	52 65%	79 66%
Second	536 12%	117 12%	130 12%	33 7%	30 9%	28 19%	51 14%	13 16%	23 19%
Third	216 5%	48 5%	46 4%	20 4%	18 6%	8 5%	16 4%	7 9%	14 12%
Fourth	115 3%	29 3%	20 2%	2 0%	15 5%	4 3%	10 3%	3 4%	3 3%
5-9 times	154 3%	38 4%	30 3%	11 2%	15 5%	6 4%	11 3%	3 4%	1 1%
More than 10 times	146 3%	31 3%	27 3%	2 0%	17 5%	16 11%	10 3%	2 3%	0 0%
Average	2.1	2.0	1.9	1.4	2.3	3.7	2.2	3.5	1.5
02. Travel companion									
Alone	652 15%	148 15%	115 11%	32 7%	31 10%	30 20%	79 21%	11 14%	32 27%
Spouse	1597 36%	443 44%	362 35%	254 52%	128 40%	37 25%	99 27%	26 33%	37 31%
Family	907 20%	160 16%	235 22%	84 17%	41 13%	37 25%	67 18%	17 21%	20 17%
Family & friends	200 5%	33 3%	35 3%	15 3%	40 13%	9 6%	30 8%	4 5%	1 1%
Family & relatives	129 3%	29 3%	34 3%	13 3%	11 3%	2 1%	17 5%	0 0%	1 1%
Friend(s)	819 18%	183 18%	240 23%	60 12%	60 19%	30 20%	65 18%	14 18%	28 23%
Business associate(s)	45 1%	4 0%	1 0%	14 3%	2 1%	2 1%	6 2%	7 9%	0 0%
Others	75 2%	7 1%	19 2%	12 2%	7 2%	4 3%	6 2%	1 1%	1 1%
03. Whole itinerary									
1-4 nights	52 1%	6 1%	1 0%	3 1%	2 1%	2 1%	6 2%	8 10%	2 2%
5-9 nights	845 19%	106 11%	78 7%	275 57%	140 44%	28 19%	39 11%	28 35%	4 3%
10-14 nights	1659 37%	457 45%	532 51%	80 17%	84 26%	66 44%	110 30%	22 28%	19 16%
15-19 nights	667 15%	189 19%	84 8%	93 19%	58 18%	26 17%	74 20%	7 9%	10 8%
20-24 nights	636 14%	128 13%	250 24%	20 4%	13 4%	16 11%	64 17%	11 14%	16 13%
25-29 nights	120 3%	32 3%	34 3%	4 1%	4 1%	0 0%	12 3%	1 1%	5 4%
30-59 nights	261 6%	49 5%	41 4%	5 1%	11 3%	3 2%	42 11%	1 1%	38 32%
More than 60 nights	151 3%	39 4%	12 1%	0 0%	3 1%	4 3%	21 6%	1 1%	25 21%
Average length	19.6	20.1	17.8	11.1	12.6	17.2	25.5	13.2	44.8
04. Nights in Kenya									
1-4 nights	224 5%	33 3%	8 1%	9 2%	12 4%	4 3%	41 11%	13 16%	10 8%
5-9 nights	1168 26%	159 16%	104 10%	285 59%	161 50%	44 29%	123 33%	30 38%	33 28%
10-14 nights	1831 41%	515 51%	559 53%	99 20%	82 26%	66 44%	135 36%	25 31%	41 34%
15-19 nights	460 10%	126 13%	72 7%	70 14%	36 11%	19 13%	31 8%	4 5%	14 12%
20-24 nights	504 11%	108 11%	242 23%	14 3%	10 3%	13 9%	21 6%	7 9%	10 8%
25-29 nights	89 2%	28 3%	25 2%	3 1%	6 2%	0 0%	4 1%	0 0%	3 3%
More than 30 nights	150 3%	39 4%	33 3%	4 1%	11 3%	5 3%	14 4%	1 1%	9 8%
Average	13.9	15.4	16.2	10.4	11.5	13.6	12.7	10.5	13.8
05. Tourist type									
Holiday	4433100%	1008100%	1045100%	484100%	320100%	151100%	370100%	80100%	120100%
VFR	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%
Incentive	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%
Conference	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%
Business	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%
Others	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%
06. Competitor destination									
Mediterranean	574 13%	112 11%	180 17%	20 4%	20 6%	21 14%	60 16%	9 11%	24 20%
Other Europe	198 4%	39 4%	38 4%	27 6%	7 2%	10 7%	23 6%	4 5%	5 4%
Caribbean	853 19%	265 26%	272 26%	58 12%	98 31%	24 16%	31 8%	10 13%	11 9%
C.&S. America	237 5%	43 4%	35 3%	36 7%	23 7%	5 3%	17 5%	5 6%	19 16%
North America	202 5%	58 6%	40 4%	32 7%	14 4%	9 6%	12 3%	4 5%	5 4%
N.&M. East	57 1%	14 1%	12 1%	9 2%	7 2%	0 0%	8 2%	0 0%	0 0%
North Africa	185 4%	33 3%	45 4%	23 5%	20 6%	8 5%	11 3%	1 1%	6 5%
Sub-Saharan	190 4%	40 4%	25 2%	11 2%	12 4%	3 2%	37 10%	5 6%	10 8%
South Asia	163 4%	58 6%	34 3%	19 4%	6 2%	2 1%	8 2%	0 0%	5 4%
Southeast Asia	283 6%	52 5%	89 9%	50 10%	10 3%	15 10%	1 0%	3 4%	5 4%
East Asia	94 2%	28 3%	13 1%	6 1%	2 1%	4 3%	9 2%	0 0%	3 3%
Oceania & Pacific	128 3%	18 2%	27 3%	19 4%	5 2%	2 1%	16 4%	5 6%	6 5%
Indian Ocean	186 4%	55 5%	25 2%	27 6%	30 9%	7 5%	12 3%	6 8%	0 0%
Others	212 5%	35 3%	35 3%	39 8%	7 2%	7 5%	18 5%	10 13%	6 5%
None	871 20%	158 16%	175 17%	108 22%	59 18%	34 23%	107 29%	18 23%	15 13%

Source: "Airport Questionnaire Survey" JICA Study Team

Table A. 32 By Tourist Origin Country (2/4)

	Total	UK	Germany	France	Italy	Switzerland	USA	South Africa	Australia
07. Kenya's strength									
Lower price	558 13%	166 16%	154 15%	54 11%	32 10%	22 15%	17 5%	9 11%	11 9%
Travel time	247 6%	29 3%	69 7%	28 6%	39 12%	8 5%	10 3%	11 14%	12 10%
Security	60 1%	1 0%	21 2%	5 1%	8 3%	3 2%	4 1%	1 1%	3 3%
Tourist attractions	1868 42%	399 40%	463 44%	191 39%	84 26%	49 32%	216 58%	18 23%	72 60%
Tourist services	132 3%	30 3%	15 1%	26 5%	11 3%	3 2%	19 5%	1 1%	5 4%
Shopping	17 0%	3 0%	2 0%	1 0%	0 0%	0 0%	7 2%	1 1%	1 1%
Relaxing atmosphere	447 10%	127 13%	73 7%	23 5%	92 29%	22 15%	22 6%	11 14%	2 2%
Others	1011 23%	226 22%	242 23%	140 29%	51 16%	37 25%	65 18%	26 33%	11 9%
08. Influential media									
Travel agent	1811 41%	356 35%	551 53%	195 40%	154 48%	73 48%	129 35%	28 35%	44 37%
Brochures	817 18%	334 33%	107 10%	82 17%	19 6%	20 13%	87 24%	5 6%	39 33%
Advertisement	442 10%	122 12%	107 10%	39 8%	22 7%	12 8%	32 9%	2 3%	13 11%
Magazines/newspapers	454 10%	80 8%	69 7%	85 18%	19 6%	15 10%	58 16%	14 18%	25 21%
Friends	1579 36%	387 38%	298 29%	176 36%	132 41%	47 31%	176 48%	27 34%	41 34%
Kenya tourist office	74 2%	14 1%	13 1%	4 1%	1 0%	2 1%	13 4%	0 0%	3 3%
Others	448 10%	108 11%	58 6%	39 8%	21 7%	10 7%	64 17%	9 11%	16 13%
09. Principal attractions									
Beach	1831 41%	547 54%	461 44%	211 44%	123 38%	68 45%	54 15%	41 51%	21 18%
Diving	479 11%	119 12%	156 15%	42 9%	44 14%	17 11%	7 2%	14 18%	3 3%
Entertainment	227 5%	33 3%	100 10%	21 4%	15 5%	4 3%	7 2%	2 3%	3 3%
Fishing	104 2%	27 3%	17 2%	8 2%	16 5%	4 3%	1 0%	13 16%	1 1%
Food	390 9%	63 6%	203 19%	21 4%	10 3%	16 11%	13 4%	2 3%	5 4%
Golf	67 2%	26 3%	6 1%	7 1%	3 1%	5 3%	4 1%	3 4%	1 1%
History & culture	819 18%	175 17%	210 20%	104 21%	59 18%	17 11%	73 20%	8 10%	34 28%
Mountain climbing	98 2%	26 3%	14 1%	8 2%	1 0%	4 3%	16 4%	4 5%	5 4%
Nature & wildlife	3505 79%	750 74%	860 82%	438 90%	244 76%	117 77%	305 82%	46 58%	107 89%
Shopping	265 6%	38 4%	45 4%	36 7%	12 4%	7 5%	35 9%	6 8%	12 10%
Sports	64 1%	17 2%	14 1%	9 2%	3 1%	3 2%	3 1%	0 0%	1 1%
Others	196 4%	55 5%	44 4%	13 3%	8 3%	9 6%	24 6%	1 1%	0 0%
10. Package tour									
Used a packaged holiday	2453 55%	706 70%	422 40%	371 77%	232 73%	76 50%	207 56%	33 41%	64 53%
Purchased tour in Kenya	302 7%	47 5%	29 3%	43 9%	6 2%	12 8%	38 10%	6 8%	17 14%
Not used	1633 37%	246 24%	584 56%	68 14%	81 25%	62 41%	121 33%	40 50%	39 33%
11. Places stayed									
11.1. Nairobi	2054 46%	464 46%	190 18%	167 35%	69 22%	41 27%	355 96%	54 68%	107 89%
Average nights spent	4.5	5.2	3.5	2.8	4.4	4.5	4.1	4.8	5.4
11.2. Mombasa City	541 12%	131 13%	57 5%	126 26%	23 7%	11 7%	53 14%	13 16%	25 21%
Average	6.0	7.5	5.4	4.3	6.8	14.3	5.9	4.8	3.0
11.3. Mombasa South	1475 33%	358 36%	486 47%	197 41%	39 12%	56 37%	30 8%	33 41%	16 13%
Average	10.0	10.1	12.5	6.9	8.1	9.9	7.5	5.8	4.6
11.4. Mombasa North	1204 27%	337 33%	403 39%	127 26%	31 10%	53 35%	29 8%	22 28%	20 17%
Average	10.8	10.4	14.0	5.9	11.7	11.5	6.2	5.3	11.2
11.5. Malindi	563 13%	143 14%	77 7%	23 5%	199 62%	14 9%	19 5%	8 10%	15 13%
Average	8.8	8.9	13.6	4.3	9.3	12.1	4.1	5.5	4.0
11.6. Lamu	222 5%	48 5%	41 4%	24 5%	14 4%	5 3%	27 7%	4 5%	10 8%
Average	4.6	5.8	6.1	2.9	4.4	4.4	3.7	2.8	6.9
11.7. Tsavo	1099 25%	283 28%	369 35%	160 33%	79 25%	34 23%	26 7%	8 10%	3 3%
Average	1.7	1.7	1.9	1.2	2.4	1.9	2.0	2.4	1.7
11.8. Amboseli	929 21%	121 12%	242 23%	230 48%	25 8%	27 18%	85 23%	6 8%	26 22%
Average	1.6	1.8	1.5	1.4	1.2	1.8	1.7	1.3	2.0
11.9. Masai Mara	1575 36%	247 25%	279 27%	273 56%	42 13%	50 33%	234 63%	21 26%	73 61%
Average	2.4	2.4	2.3	2.2	2.1	2.5	2.6	3.0	2.3
11.10. Mt. Kenya	790 18%	181 18%	59 6%	99 20%	21 7%	19 13%	172 46%	8 10%	51 43%
Average	2.7	2.5	1.8	1.8	4.8	2.2	2.6	1.5	1.7
11.11. Naivasha	878 20%	228 23%	100 10%	107 22%	12 4%	16 11%	112 30%	10 13%	60 50%
Average	1.8	2.0	1.7	1.6	1.9	4.6	1.6	3.9	1.7
11.12. Baringo & Bogoria	474 11%	108 11%	43 4%	45 9%	8 3%	10 7%	113 31%	3 4%	42 35%
Average	2.4	3.7	2.0	1.5	3.8	2.4	2.2	2.0	1.9
11.13. Western	162 4%	38 4%	22 2%	7 1%	1 0%	0 0%	27 7%	1 1%	16 13%
Average	5.3	5.6	9.8	2.0	1.0	0	4.2	3.0	3.6
11.14. Northern	86 2%	14 1%	14 1%	9 2%	3 1%	2 1%	12 3%	0 0%	8 7%
Average	4.3	6.1	2.6	1.2	2.0	6.5	7.8	0.0	5.5
11.15. Tana	14 0%	3 0%	0 0%	2 0%	0 0%	0 0%	3 1%	0 0%	1 1%
Average	3.3	1.7	0.0	2.0	0.0	0.0	1.0	0.0	5.0

Source: "Airport Questionnaire Survey" JICA Study Team

Table A. 32 By Tourist Origin Country (3/4)

	Total	UK	Germany	France	Italy	Switzerland	USA	South Africa	Australia
12. Use of camp sites									
Stayed	494 11%	93 9%	57 5%	52 11%	29 9%	16 11%	66 18%	11 14%	44 37%
Average	5.3	6.0	3.6	3.4	2.2	4.6	6.4	5.6	7.7
13. Combined destination									
None	3266 74%	814 81%	891 85%	426 88%	276 86%	122 81%	129 35%	59 74%	23 19%
TZ Inland	493 11%	84 8%	66 6%	15 3%	18 6%	13 9%	116 31%	4 5%	54 45%
TZ Coast	235 5%	50 5%	31 3%	8 2%	11 3%	1 1%	40 11%	5 6%	27 23%
Uganda	125 3%	25 2%	8 1%	3 1%	2 1%	3 2%	23 6%	0 0%	21 18%
Zaire	50 1%	10 1%	1 0%	2 0%	1 0%	0 0%	6 2%	0 0%	12 10%
Ethiopia	28 1%	3 0%	0 0%	0 0%	2 1%	0 0%	9 2%	0 0%	3 3%
Somalia	13 0%	2 0%	0 0%	2 0%	0 0%	0 0%	4 1%	0 0%	0 0%
Sudan	10 0%	5 0%	0 0%	0 0%	0 0%	0 0%	1 0%	0 0%	2 2%
Egypt	40 1%	3 0%	3 0%	7 1%	0 0%	1 1%	13 4%	0 0%	3 3%
Zambia	57 1%	8 1%	6 1%	0 0%	0 0%	1 1%	9 2%	2 3%	13 11%
Zimbabwe	215 5%	35 3%	20 2%	0 0%	0 0%	3 2%	33 9%	4 5%	68 57%
Malawi	64 1%	17 2%	9 1%	2 0%	0 0%	0 0%	4 1%	4 5%	13 11%
Mozambique	13 0%	2 0%	2 0%	0 0%	1 0%	1 1%	1 0%	0 0%	2 2%
Madagascar	60 1%	1 0%	16 2%	2 0%	1 0%	1 1%	21 6%	0 0%	6 5%
Botswana	17 0%	1 0%	2 0%	0 0%	1 0%	2 1%	0 0%	0 0%	3 3%
S. Africa	90 2%	11 1%	9 1%	0 0%	1 0%	2 1%	15 4%	6 8%	15 13%
Mauritius	46 1%	8 1%	17 2%	4 1%	2 1%	2 1%	1 0%	0 0%	2 2%
Seychelles	81 2%	11 1%	12 1%	5 1%	2 1%	1 1%	24 6%	1 1%	4 3%
Other Africa	62 1%	15 1%	6 1%	1 0%	2 1%	2 1%	10 3%	2 3%	4 3%
Others	135 3%	9 1%	2 0%	6 1%	1 0%	3 2%	55 15%	0 0%	8 7%
Improvement needs score									
14. Score for Security	2.3	2.3	2.0	2.3	2.5	2.4	2.2	2.2	2.7
15. Beach boys	2.8	2.9	2.8	2.6	2.7	2.7	2.7	3.0	2.9
16. Entertainment	2.1	2.2	2.1	2.3	2.3	1.9	1.9	2.0	2.0
17. Foods	1.9	2.1	1.8	2.1	2.1	1.8	1.8	2.1	2.0
18. Hotel	1.7	1.7	1.6	1.8	1.8	1.6	1.7	1.7	1.8
19. Contact w/locals	2.1	2.0	2.1	2.5	2.3	2.0	2.0	1.9	2.1
20. Shopping	2.1	2.2	2.1	2.1	2.0	2.1	1.9	2.5	2.0
21. Environment	2.8	2.6	3.2	2.5	2.4	3.1	2.6	2.4	2.9
22. Information	2.2	2.3	2.1	2.4	2.6	1.9	2.2	2.1	2.3
23. Local cultures	2.1	2.0	2.1	2.4	2.6	2.0	1.9	2.1	2.1
24. Tour operator	1.9	2.0	1.8	2.0	2.2	1.6	1.7	1.8	1.8
25. Public transport	2.5	2.6	2.3	2.7	2.8	2.3	2.2	2.3	2.4
26. Total expenditure									
Less than 1000	329 21%	234 57%	16 5%	16 11%	26 13%	3 5%	5 4%	8 27%	4 9%
1000-2000	382 24%	110 27%	83 25%	34 23%	75 37%	14 23%	10 8%	4 13%	4 9%
2000-3000	344 21%	18 4%	125 37%	48 33%	63 31%	19 32%	15 12%	7 23%	8 18%
3000-4000	190 12%	0 0%	73 22%	21 14%	22 11%	8 13%	20 16%	1 3%	5 11%
4000-5000	56 3%	1 0%	14 4%	7 5%	4 2%	1 2%	14 11%	0 0%	3 7%
5000-6000	33 2%	1 0%	5 1%	2 1%	0 0%	1 2%	14 11%	1 3%	2 5%
6000 & over	84 5%	7 2%	5 1%	5 3%	4 2%	1 2%	35 28%	2 7%	10 23%
Average	2,464	1,143	2,607	2,529	2,106	2,438	4,754	2,409	5,456
27. Expenditure in Kenya									
Less than \$500	821 51%	328 81%	159 47%	76 52%	96 47%	28 47%	51 40%	10 33%	11 25%
500-1000	335 21%	28 7%	116 35%	30 21%	60 29%	11 18%	16 13%	6 20%	9 20%
1000-1500	110 7%	7 2%	21 6%	13 9%	16 8%	4 7%	19 15%	3 10%	6 14%
1500-2000	67 4%	2 0%	16 5%	6 4%	10 5%	2 3%	10 8%	0 0%	3 7%
2000-2500	26 2%	0 0%	0 0%	1 1%	8 4%	2 3%	4 3%	1 3%	1 2%
2500-3000	11 1%	0 0%	2 1%	2 1%	1 0%	0 0%	3 2%	0 0%	2 5%
\$3000 & over	46 3%	5 1%	7 2%	5 3%	3 1%	0 0%	8 6%	2 7%	6 14%
Average	687	375	685	740	701	564	944	1,188	1,423
28. Shopping in Kenya									
Less than \$100	772 48%	313 77%	172 51%	53 36%	66 32%	29 48%	44 35%	9 30%	13 30%
100-200	267 17%	32 8%	71 21%	33 23%	44 22%	9 15%	24 19%	3 10%	13 30%
200-300	107 7%	14 3%	19 6%	12 8%	8 4%	2 3%	16 13%	3 10%	5 11%
300-500	151 9%	6 1%	41 12%	21 14%	57 28%	2 3%	9 7%	1 3%	0 0%
500-700	71 4%	2 0%	15 4%	5 3%	12 6%	4 7%	12 10%	2 7%	5 11%
700-1000	22 1%	0 0%	2 1%	5 3%	4 2%	1 2%	1 1%	2 7%	1 2%
\$1000 & over	25 2%	3 1%	1 0%	4 3%	3 1%	0 0%	4 3%	2 7%	1 2%
Average	181	105	156	243	235	136	217	545	213

Source: "Airport Questionnaire Survey" JICA Study Team

Table A. 32 By Tourist Origin Country (4/4)

	Total	UK	Germany	France	Italy	Switzerland	USA	South Africa	Australia
29.Revisit									
Interested	3493 79%	807 80%	882 84%	354 73%	227 71%	116 77%	296 80%	62 78%	84 70%
Not sure	684 15%	148 15%	113 11%	99 20%	66 21%	22 15%	55 15%	11 14%	25 21%
Not interested	212 5%	49 5%	34 3%	24 5%	23 7%	7 5%	17 5%	6 8%	11 9%
30.Places for next visit									
Nairobi	1005 23%	261 26%	236 23%	124 26%	87 27%	22 15%	75 20%	12 15%	12 10%
Mombasa City	523 12%	96 10%	74 7%	47 10%	26 8%	7 5%	92 25%	8 10%	19 16%
Mombasa South	1074 24%	219 22%	315 30%	83 17%	34 11%	30 20%	100 27%	25 31%	25 21%
Mombasa North	748 17%	185 18%	174 17%	54 11%	20 6%	14 9%	77 21%	13 16%	34 28%
Malindi	717 16%	229 23%	151 14%	78 16%	62 19%	19 13%	40 11%	13 16%	17 14%
Lamu	646 15%	166 16%	104 10%	74 15%	60 19%	20 13%	66 18%	14 18%	23 19%
Tsavo	889 20%	227 23%	204 20%	94 19%	64 20%	31 21%	86 23%	13 16%	23 19%
Amboseli	1231 28%	254 25%	305 29%	132 27%	113 35%	49 32%	101 27%	10 13%	43 36%
Masai Mara	2312 52%	559 55%	553 53%	251 52%	184 58%	83 55%	199 54%	36 45%	43 36%
Mt.Kenya	1084 24%	293 29%	156 15%	127 26%	68 21%	37 25%	126 34%	19 24%	38 32%
Naivasha&Nakuru	640 14%	162 16%	118 11%	80 17%	45 14%	26 17%	54 15%	6 8%	14 12%
Baringo&Bogoria	627 14%	182 18%	89 9%	88 18%	51 16%	21 14%	63 17%	10 13%	11 9%
Western	1058 24%	236 23%	243 23%	148 31%	114 36%	29 19%	97 26%	13 16%	15 13%
Northern	775 17%	153 15%	153 15%	106 22%	91 28%	24 16%	67 18%	5 6%	19 16%
Eastern	305 7%	61 6%	54 5%	48 10%	39 12%	15 10%	29 8%	0 0%	9 8%
33-34.Age-Sex									
Male -30	726 16%	189 19%	191 18%	37 8%	51 16%	26 17%	41 11%	15 19%	24 20%
Male 30-40	676 15%	134 13%	155 15%	99 20%	39 12%	21 14%	42 11%	13 16%	18 15%
Male 40-50	639 14%	155 15%	144 14%	69 14%	54 17%	31 21%	45 12%	9 11%	8 7%
Male 50-60	404 9%	63 6%	116 11%	65 13%	24 8%	7 5%	44 12%	3 4%	9 8%
Male 60-	166 4%	46 5%	46 4%	13 3%	8 3%	4 3%	24 6%	2 3%	5 4%
Female -30	692 16%	159 16%	157 15%	68 14%	68 21%	16 11%	39 11%	12 15%	28 23%
Female 30-40	457 10%	116 12%	102 10%	66 14%	29 9%	21 14%	31 8%	10 13%	8 7%
Female 40-50	381 9%	91 9%	82 8%	39 8%	29 9%	13 9%	37 10%	11 14%	7 6%
Female 50-60	142 3%	26 3%	22 2%	17 4%	12 4%	6 4%	28 8%	4 5%	4 3%
Female 60-	38 1%	4 0%	7 1%	3 1%	4 1%	4 3%	11 3%	1 1%	1 1%
35a.Origin area									
Africa	178 4%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	80 100%	0 0%
Europe	3572 81%	1008 100%	1045 100%	484 100%	320 100%	151 100%	0 0%	0 0%	0 0%
North America	420 9%	0 0%	0 0%	0 0%	0 0%	0 0%	370 100%	0 0%	0 0%
Near&Middle East	24 1%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%
South Asia	22 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%
East Asia	64 1%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%
Oceania	134 3%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	120 100%
Others	12 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%
35b.Origin country									
UK	1008 23%	1008 100%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%
Germany	1045 24%	0 0%	1045 100%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%
France	484 11%	0 0%	0 0%	484 100%	0 0%	0 0%	0 0%	0 0%	0 0%
Italy	320 7%	0 0%	0 0%	0 0%	320 100%	0 0%	0 0%	0 0%	0 0%
Switzerland	151 3%	0 0%	0 0%	0 0%	0 0%	151 100%	0 0%	0 0%	0 0%
USA	370 8%	0 0%	0 0%	0 0%	0 0%	0 0%	370 100%	0 0%	0 0%
South Africa	80 2%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	80 100%	0 0%
Australia	120 3%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	120 100%
Others	854 19%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%
36.Marital status									
Single	1606 36%	358 36%	398 38%	117 24%	111 35%	68 45%	153 41%	28 35%	63 53%
Married	2548 57%	608 60%	566 54%	329 68%	194 61%	72 48%	198 54%	49 61%	52 43%
Others	269 6%	42 4%	78 7%	36 7%	13 4%	11 7%	19 5%	3 4%	4 3%
Survey									
May	1326 30%	248 25%	296 28%	246 51%	58 18%	40 26%	74 20%	34 43%	26 22%
July	1506 34%	353 35%	414 40%	92 19%	58 18%	51 34%	170 46%	16 20%	50 42%
December	1601 36%	407 40%	335 32%	146 30%	204 64%	60 40%	126 34%	30 38%	44 37%

Source: "Airport Questionnaire Survey" JICA Study Team

6. Survey Sheet

1. How many times have you visited Kenya including this visit? (Please complete)
() time(s)
2. Who is your travel companion? (Please circle only one)
 1. Alone
 2. Spouse
 3. Family
 4. Family and friend(s)
 5. Family and relative(s)
 6. Friend(s)
 7. Business associate(s)
 8. Others (Please specify _____)
3. How long is your whole itinerary including nights spent outside of Kenya? (Please complete)
() night(s)
4. How many nights did you spend in Kenya? (Please complete)
() night(s)
5. What was the main purpose of your visit to Kenya? (Please circle one answer only)
 1. Holiday
 2. Visit friends and relatives
 3. Incentive travel
 4. Conference and convention
 5. Business
 6. Transit
 7. Others (please specify _____)

If you chose 2 to 7 in the above question, please proceed to Question 10.

6. You might have considered other destinations before you finally chose Kenya. What was the most prospective destination next to Kenya? (please circle only one)
 1. Mediterranean Europe (Spain, France, Italy, Greece etc.)
 2. Other Europe
 3. Caribbean Islands
 4. Other Central and South America
 5. North America
 6. Near and Middle East (Turkey, Syria etc.)
 7. North Africa (Morocco, Tunisia, Egypt etc.)
 8. Sub-Saharan Africa
 9. South Asia (Iran, India, Sri Lanka, Nepal, Bhutan)
 10. South East Asia (Thai, Indonesia, Malaysia, Singapore, Philippines etc.)
 11. East Asia (China, Hongkong etc.)
 12. Oceania and Pacific Islands
 13. Indian ocean (Seychelles, Mauritius, Reunion, Maldives, Comoros & Madagascar)

14. Others (Please specify _____)
15. None
7. What was the most important reason for choosing Kenya? (Please circle only one)
1. Lower price
 2. Shorter travel time
 3. Better security condition
 4. Richer tourist attractions
 5. Better tourism related services
 6. More appealing shopping items
 7. More relaxing atmosphere
 8. Others (please specify _____)
8. How did you come to know Kenya as a tourist destination? (Please circle all that apply)
1. Travel agent
 2. Brochures
 3. Advertisement (Poster, TV, Radio, Magazines)
 4. Magazine and newspaper articles
 5. Friends
 6. Kenya tourist office abroad
 7. Other (please specify _____)
9. What were your principal attractions in Kenya? (Please circle all that apply)
- | | |
|-------------------------|---|
| 1. Beach | 7. Golf |
| 2. History and culture | 8. Mountain climbing |
| 3. Nature and wild life | 9. Fishing |
| 4. Shopping | 10. Diving (scuba or snorkel) |
| 5. Entertainment | 11. Other sports (Please specify _____) |
| 6. Food | 12. Others (Please specify _____) |
10. Did you use package tour? (Please circle one)
1. Used package tour from your country of residence to Kenya
 2. Used package tour(s) purchased in Kenya
 3. Did not use package tour
11. How many nights did you spend in the following areas in Kenya? (Please complete)
- | | |
|------------------------|--------------|
| 1. Nairobi | () night(s) |
| 2. Mombasa city | () night(s) |
| 3. Mombasa South Coast | () night(s) |
| 4. Mombasa North Coast | () night(s) |
| 5. Watamu and Malindi | () night(s) |

6. Lamu and its vicinity () night(s)
7. Tsavo, Taita Hills and its vicinity () night(s)
8. Amboseli () night(s)
9. Masai Mara () night(s)
10. Aberdare, Meru, Mt. Kenya, Embu and Samburu () night(s)
11. Naivasha and Nakuru () night(s)
12. Baringo and Lake Bogoria () night(s)
13. Kisumu, Lake Victoria and Mt. Elgon - Western Kenya () night(s)
14. Lake Turkana, Marsabit and Losai- Northern Kenya () night(s)
15. Tana River Basin and Garissa - Eastern Kenya () night(s)

12. While in Kenya, how many nights did you spend at self-catering camping sites?

() nights

13. What are your combined destinations with Kenya?

1. None (Kenya only)
2. Tanzania inland
3. Tanzania Coast
4. Uganda
5. Zaire
6. Ethiopia
7. Somalia
8. Sudan
9. Egypt
10. Zambia
11. Zimbabwe
12. Malawi
13. Mozambique
14. Madagascar
15. Botswana
16. South African Republic
17. Mauritius
18. Seychelles
19. Other African countries (Pls. specify_____)
20. Others (Please specify_____)

How do you rate the adequacy of the following issues regarding Kenyan Tourism?

	No need for improvement	Little need for improvement	Needs improvement	Strong need for improvement
14. Security	1	2	3	4
15. Control over vendors, guides & beach boys	1	2	3	4
16. Availability of entertainment & night activities	1	2	3	4
17. Availability of good foods and restaurants	1	2	3	4
18. Availability of good hotels	1	2	3	4
19. Chances to see and experience local community	1	2	3	4
20. Availability of attractive shopping items	1	2	3	4
21. Environmental protection	1	2	3	4
22. Tourist information	1	2	3	4

23. Chances to see tribal cultures	1	2	3	4
24. Reliability and quality of tour operators	1	2	3	4
25. Taxi service and public transport	1	2	3	4

26. How much have you spent for the whole trip including air fare, tour package fare and hotels?

Currency() Amount() for.()persons

27. While in Kenya approximately how much did you spend?

Currency() Amount() for.()persons

28. While in Kenya approximately how much did you spend on shopping only?

Currency() Amount() for.()persons

29. How interested would you be in visiting Kenya again? (Please circle only one)

1. Interested
2. Not sure
3. Not interested

30. If you are interested in visiting Kenya again, which areas would you like to visit next time? (Please circle all that apply)

- | | |
|---------------------------|--|
| 1. Nairobi | 9. Masai Mara |
| 2. Mombasa City | 10. Aberdare, Meru, Mt. Kenya, Embu & Samburu |
| 3. Mombasa South Coast | 11. Naivasha and Nakuru |
| 4. Mombasa North Coast | 12. Lake Baringo and Lake Bogoria |
| 5. Watamu and Malindi | 13. Kisumu, Lake Victoria and Mt. Elgon |
| 6. Lamu and its vicinity | 14. Lake Turkana and Marsabit - Northern Kenya |
| 7. Tsavo and its vicinity | 15. Tana River Basin and Garissa - Eastern Kenya |
| 8. Amboseli | |

31. If you are not interested in visiting Kenya again, please specify your reasons.

32. What aspects of your staying in Kenya did you not like?

The following questions are only to be used for a population profile. We would appreciate it very much if you could answer as appropriate

33. Age group (Please circle only one)

- | | |
|----------|-----------|
| 1. 15-19 | 7. 45-49 |
| 2. 20-24 | 8. 50-54 |
| 3. 25-29 | 9. 55-59 |
| 4. 30-34 | 10. 60-64 |

5. 35-39

11. 65-

6. 40-44

34. Sex

1. Male

2. Female

35. Country of residence

()

36. Marriage status

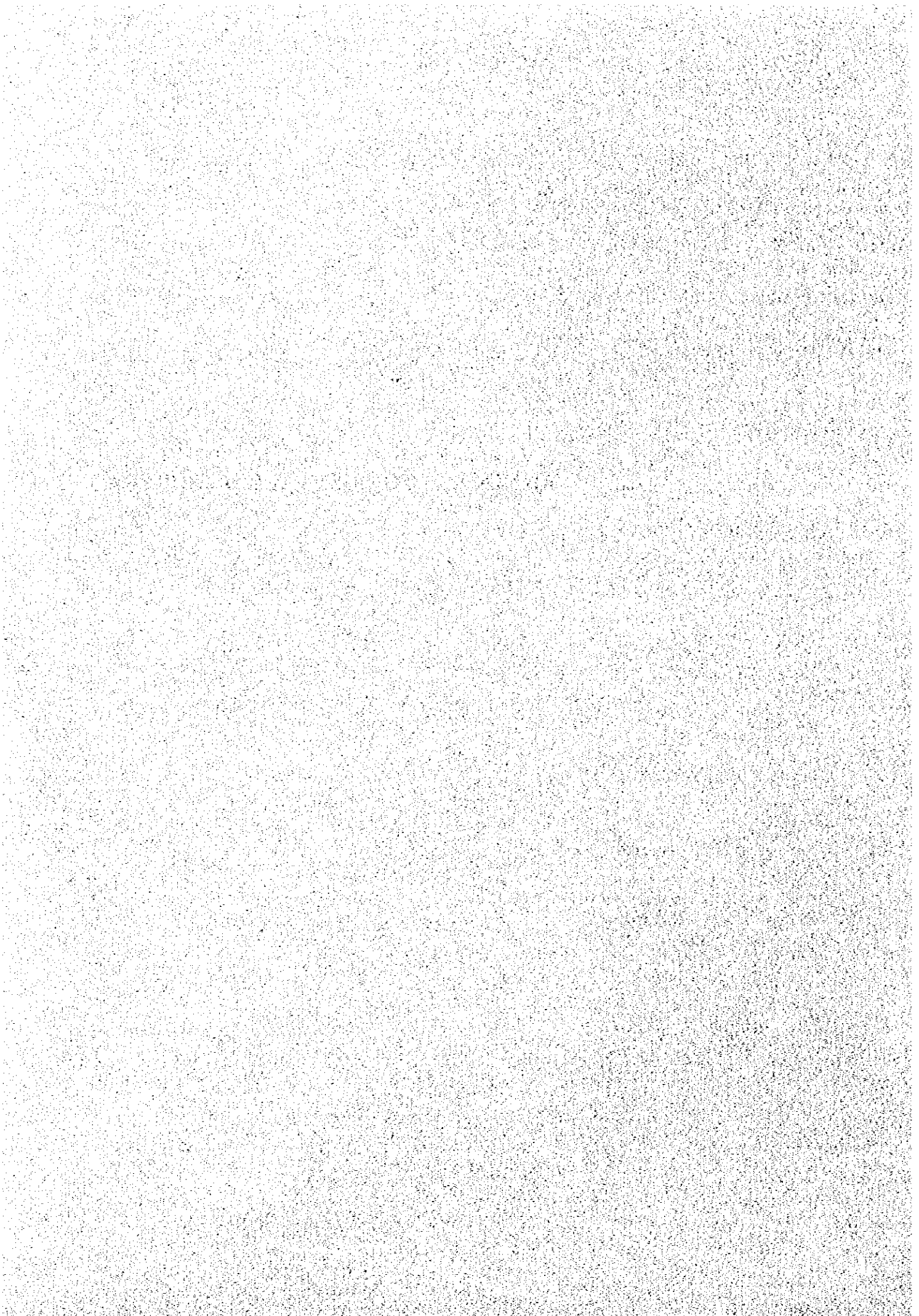
1. Single

2. Married

Thank you for taking the time to complete this questionnaire. Your response is important and will help us to improve our services. We appreciate your cooperation.

Enjoy your flight!

ANNEX 2 TOURIST FACILITY SURVEY



Annex 2 Tourist Facility Survey

1. Introduction

1.1 Background

The Government of Kenya (GOK) has embarked on "The Study on the National Tourism Development Master Plan" with the technical assistance of the Government of Japan (GOJ). The Japan International Cooperation Agency (JICA), being the official executing agency for GOJ technical cooperation programme is undertaking the Study collaborating with the Ministry of Tourism and Wildlife (MOTW).

The Study Team has conducted four special field surveys which are summarized in this volume. The Facility Survey, hereafter the Survey, was aiming at the present condition survey of tourist facilities, emphasizing accommodation facilities and their utilities, and was performed by the cooperation between JICA Study Team and local consultant, with close collaboration of MOTW.

2. Objectives of the Survey

The Survey objectives is to collect updated information to examine and evaluate the present condition of tourism facilities, in particular accommodation facilities and their utilities.

3. Survey Items

Major survey Items can be summarized as shown below ;

a. General Information

- Name and location
- Year of Construction
- Site and floor area
- Number and rate of guest rooms
- Available facilities, etc.

b. Infrastructure and Utility

- Water supply; amount of consumption, source of water, etc.
- Sewage disposal; amount of sewage, treatment system, etc.

- Garbage disposal; amount of garbage, method of disposal
- Power supply; amount of consumption, source of power, etc.
- Telecommunication; No. of telephone lines, other facility, etc.
- Access Transportation; mode of arrival, travel distance, etc.
- Other infrastructural constraints

c. Hotel Operation

- Number of guests per annum and their origins
- Occupancy rate by month
- Average length of stay
- Average expenditure, etc.

d. Hotel Service Level

- Guest room facility and equipment
- Restaurant and bar

e. Others

- Future development plan, etc.

Questionnaire in detail, refer to the attached survey sheet.

4. Mobilization

Three survey teams were set up under the leadership of coordinator and assistant coordinators. The teams were developed according to their survey fields as follows ;

- Nairobi and its environs
- Coastal Area, including the Town of Mombasa
- The Rift Valley and Western Area. i.e. Naivasha, Nakuru, Eldoret, Kisumu, Kitale, etc.

The Survey was commenced on May 4th, 1994 and concluded on June 7th, 1994.

5. Survey Methodology

5.1 Survey Mode

The Study Team, the Survey Team and MOTW have discussed thoroughly and agreed three survey methods which were implemented as follows ;

a. Face-to Face Survey

The Survey Teams were to make actual visit to the sampled hotels and carry out face-to-face interview survey with respondents within the management of the respective facilities.

b. Headquarters Survey

There are thirteen chain hotel company in Kenya which manage about seventy hotels. For these kind of hotels, the Survey was carried out at their Nairobi headquarters by interviews to their personnel in charge of management.

c. Postal Survey

Sampled facilities which are out of the list of the face-to-face survey, most of them are located in the remote places, were covered through the postal survey. For the postal survey, another simplified survey sheet was used.

5.2 Sampling

In the process of sampling, the Survey Team considered the conditions, i.e. i) limited duration and number of samples of this Survey, ii) accessibility to samples, iii) importance of the facility in the area as a key facility, iv) necessity to reflect both geographical and star-class distribution. The sampling method was discussed with the Study team and MOTW in detail in prior to the performance. As a result, the final samples were drawn in such a way as to ensure the followings ;

- a. The samples were to cover all the star-classes, but where possible, they were based, in favor of hotels of 3 and 4 stars. Because these classes are the major classes of hotels accommodating normal class international tourists and were considered that constraints they are facing were the most common ones.
- b. Sampling was basing on the list of MOTW' Star Class Hotel. Thus, not to miss out-of-list facilities, the Survey

Team was selecting adequate facilities on site, which were not included in the preliminary sample list.

- c. A rational geographical representation in the relation of already existing tourist facilities and limited survey duration, the following areas and towns are selected for face-to-face survey;

- Nairobi and environs : Nairobi, Kiambu, Thika, Karatina, Nyeri
- Rift Valley and Western : Naivasha, Nakuru, Eldoret, Kitale, Bungoma, Kakamega, Kisumu, Kericho
- Coastal : Mombasa City, South Coast, North Coast

Detailed result of sampling, refer to Table ____.

6. Result of Survey

6.1 Number of Collected Results

The Survey Team collected survey results as follows by survey modes;

- Face-to-face survey : 85 Units
- Headquarters survey : 16 Units
- Postal survey : 16 Units
- Total : 117 Units

Distribution by the Tourism Regions and star classes are as follows ;

	5 Stars	4 Stars	3 Stars	2 Stars	1 Star	No Star	Total
Nairobi	4	2	9	4	8	6	33
Central	3	1	9	7	6	2	28
Masailand	2		1	1		1	5
Western	1	1	4	3		1	10
Turkana							
Northern							
Tana Basin							
Coastal	4	8	17	4	2	4	39
Eastern	2						2
Total	16	12	40	19	16	14	117

6.2 Major Results

6.2.1 General Information and Hotel Management

Major indicators of facilities, i.e. average number of rooms, average occupancy rate, average room rate, average length of stay by star classes are summarized on Table ____.

(1) Average Number of Rooms

Average number of rooms per facility through out the country and classes is 76. When examined by tourism region and classes, 5 stars in the Coastal Region has the highest number of 236, which reflect the fact that high class beach resorts for mass tourists are concentrated in the Region. The second is 5 stars in Nairobi, 178, which shows the rather moderate scale of international urban hotels.

(2) Average Occupancy Rate

National average occupancy rate is 63 %, quite a sufficient rate comparing with international level. The highest is that of 5 stars in the Eastern Region, or Tzavo West National Park, 90 %. This is the result of their location. In Tzavo West, accommodation facilities are still in sufficient considering the park's fame and number of visitors. The second is 87 % of 2 stars in Nairobi, where long stay young travelers and workers are staying. Besides these cases, 5 stars of Nairobi and the Coastal Region reaches 75 % and 72 %.

(3) Average Room Rate

National average room rate is \$ 69, which is topped by 5 stars with \$ 165, and followed by 3 stars and 4 stars with \$ 81 and \$ 77 respectively. 2 stars and 1 star shows the result of \$ 35 and \$ 21. These results presents the fact that classified or starred hotels are grouped by three, high rate group with rates over \$ 100, medium between \$ 50 and \$ 100 and low under \$ 50. Another result is that no star hotels has an average rate of \$ 40, higher than 1 star. This makes us aware of that no star hotel does not only mean the lowest, in the sense of rate and quality, but includes some "out of classification" qualified hotels, or homestay, safari camp and other free-style accommodation.

(4) Average Length of Stay

Average length of stay in Kenya comes 3 nights. ranging from 1 night in the Eastern Region upto 11 night in the Coastal Region. These can be grouped by two groups, 1 or 2 nights short stay with

styles of circuit or safari tour, long stay more than 10 nights with resort stay style in the Coastal Region. Nairobi's case of 9 nights can be concluded that this number is a result of mixture of business and holiday stay. If it is observed carefully, holiday maker's stay in Nairobi may be much shorter, 2 or 3 nights.

(5) Share of Foreign Guests

Share of foreign guests in sample cases was 77.8 % in total. The highest is that of Nairobi 5 stars', 97.0 %, and followed by Masailand's no star, 94.3 %, and Coastal's 3 star, 92.0 %. By class, 4 stars' 86.2 % is the highest, followed by 5 stars' 81.9 %, 3 stars' 79.9 %. 2 stars and 1 stars stay on the lower level 45.4 % and 30.0 % respectively. No star class shows quite high level of 76.8 %, because it includes extreme high class camps and resort out of official classification. By region, Masailand has the highest rate, 93.7 %, followed by Coastal's 87.8 % and Nairobi's 74.1 %. Western shows low rate of 117.8 %, which may tell that the region is not established as a tourist destination for normal tourists.

(6) Type of Guests

Types of guests were surveyed by categories of traveling style as tour groupe, individual through agent, individual, walk-in and others, such like airli crew or contracted company staff. The result is presented on Table XX. On this table, number of answers of top category is compiled. In general, it can be said that higher class facilities are tend to depend on tour group's and lowers onto walk-in tourists. In Nairobi, airline's crew shares much of 5 stars hotels, 75 %. In Masailand, all the facilities, 100 %, are chiefly depending onto tour groups. In the Coastal Region, 73 % facilities are answering tour groups. Later two cases show the characteristics of Kenyan tourism, mass group tourism.

(6) Number of Employees

Average number of hotel employees per bed is 0.77 in total. 6 "region x class" s show over 1.00, namely Catnral 5 stars, 1.74, Masailand 5 stars, 1.50, Masailand no star, 1.37, Nairobi 5 stars, 1.33, Nairobi 4 stars, 1.09 and Masailand 2 stars, 1.04. By region, Masailand marks the highest, 1.05 because of its labour intensive safari tourism. On the other hand, Coastal stays low level of 0.68, which shows rationalized service system. By class 5 stars ranked first with the rate of 1.06, a quite natural result of higher level service.

(7) Land and Building Ownership

In national total, 71 % hotels and lodges own their land. By star classes, it is notable that 91 % of 4 stars hotels owns their lands, while others show quite shimilar percentage of around 70 %. By region, the Coastal Region shows high mark of 89 %, while the Masailand shows law ones of 25 %, which may reflect the region's delicate situation of ownership. In building ownership, 93 % is owned by hotel's own. It is remarkable that 100 % of 4 stars hotels are self owned.

6.2.2 Infrastructure and Utility Service

(1) Water Supply

Generally speaking, water supply to hotels are managed by local authorities, but in some regions depending on safari type tourism. They are supplied by their own boreholes. In the coastal area, they are supplied water by local authorities but with supplemental water systems of borehole, 87 %, because of serious short of piped water. Through the survey, it is clarified that pumping up underground water in the Coastal region causing a serious problem of salination from sea water. Thus, the improvement of the supply system can be said one of the most urgent works in the Coastal Region as well as the development of new supply system.

(2) Sewerage Service

Urban sewerage system is not widely applied in Kenya, but Nairobi and Mombasa, thus sewer is treated by individual or private system in most cases. Waste water quality standard is guided by the Government, but the result of the survey suggest that waste water quality is not controlled sufficient or enough to answer the standard. Thus the expansion and development of sewerage system in urban areas is urgently expected. At the same time, the control and monitering system for indeividual treatment system is required.

(3) Power Supply

Most of hotels, or 92 % of samples, are supplied power from KPL's main grid but safari lodges in the Masailand region and the Easter region, or Tzavo. Black-out is very common in every regions but in Nairobi centre. Maintenance and operation of power supply system is the biggest problem than preparing new systems.

(4) Garbage Disposal

68 % of samples is answering that they are served local authorities' collection service. But through the eye observation during the Survey, collection service is not working well or enough. Cleanness in tourism area is an important factor for building an image of preferable touristic area, thus an operation of collecting service must be well maintained. In safari regions like the Masailand and the Eastern region, garbage is buried in pits or burned. Controlled disposal must be done especially in these delicate regions naturally.

Table A 34 Summary of Survey Result (1/5)

		No. of Facilities	No. of Rooms	Ave. No. of Rooms	Ave. Occ. Rate (%)	Ave. Rate (US\$)	Ave Len. of Stay	Foreigner Ratio (%)	Employees per Bed	Ave. Area per Rm.
Nairobi	5 Stars	4	711	178	75	190	2	97	1.33	101
	4 Stars	2	277	139	71	63	5	75	1.09	80
	3 Stars	9	914	102	71	58	6	75	0.65	69
	2 Stars	4	156	39	87	26	18	51	0.57	58
	1 Star	8	256	32	54	15	7	29	0.66	62
	No Star	6	230	38	80	28	16	69	0.81	64
	Total/Ave.	33	2,544	77	72	54	9	74	0.92	72
Central	5 Stars	3	204	68	68	187	2	55	1.74	44
	4 Stars	1	56	56	50	100	3	67	0.95	27
	3 Stars	9	505	56	45	66	3	76	0.72	53
	2 Stars	7	325	46	20	19	3	8	0.53	n.a.
	1 Star	6	120	20	40	16	3	63	0.8	65
	No Star	2	63	32	45	78	1	83	0.69	19
	Total/Ave.	28	1,273	45	42	59	2	63	0.8	57
Masailand	5 Stars	2	59	30	63	168	2	92	1.5	n.a.
	4 Stars									
	3 Stars	1	75	75	70	175	2	n.a.	0.61	33
	2 Stars	1	26	26	n.a.	14	n.a.	n.a.	1.04	n.a.
	1 Star									
	No Star	1	51	51	60	242	2	94	1.37	78
	Total/Ave.	5	211	42	65	178	2	94	1.05	52
Western	5 Stars	1	50	50	n.a.	120	2	n.a.	n.a.	n.a.
	4 Stars	1	45	45	46	50	1	29	0.81	36
	3 Stars	4	285	71	50	48	2	18	0.73	47
	2 Stars	3	69	23	45	13	3	13	0.85	36
	1 Star									
	No Star	1	26	26	35	15	n.a.	0	0.65	46
	Total/Ave.	10	475	48	48	42	2	18	0.75	43
Coastal	5 Stars	4	944	236	72	134	9	84	0.71	47
	4 Stars	8	1,376	172	66	95	17	97	0.73	22
	3 Stars	17	1,475	87	67	57	11	92	0.68	40
	2 Stars	4	258	65	58	84	14	60	0.5	29
	1 Star	2	65	33	45	32	6		0.83	42
	No Star	4	179	45	55	38	2	83	0.43	42
	Total/Ave.	39	4,297	110	67	73	11	88	0.68	42
Eastern	5 Stars	2	100	50	90	148	1	n.a.	n.a.	
	4 Stars									
	3 Stars									
	2 Stars									
	1 Star									
	No Star									
	Total/Ave.	2	100	50	90	148	1			
National	5 Stars	16	2,068	129	73	165	1	82	1.06	64
	4 Stars	12	1,754	146	66	77	5	86	0.79	41
	3 Stars	40	3,254	81	62	81	5	80	0.68	48
	2 Stars	19	834	44	47	35	5	45	0.57	52
	1 Star	16	441	28	49	21	4	30	0.73	47
	No Star	14	549	39	65	40	5	77	0.68	49
	Total/Ave.	117	8,900	76	63	69	3	78	0.77	53

Source : JICA Study Team

Table A 34 Summary of Survey Result (2/5)

(%)

		Major Type of Guests				
		Tour Group	Individual thru. Agent	Individual	Walk-in	Others
Nairobi	5 Stars	25				75
	4 Stars	100				
	3 Stars	29		42	29	
	2 Stars	25		25	50	
	1 Star			25	75	
	No Star			17	66	17
	Total/Ave.	19		23	45	13
Central	5 Stars	100				
	4 Stars	100				
	3 Stars	37	13	50		
	2 Stars	29			71	
	1 Star	33		12	50	
	No Star				100	
	Total/Ave.	42	4	19	35	
Masailand	5 Stars	100				
	4 Stars					
	3 Stars	100				
	2 Stars	100				
	1 Star					
	No Star	100				
	Total/Ave.	100				
Western	5 Stars					
	4 Stars	100				
	3 Stars	75	25			
	2 Stars		33	67		
	1 Star					
	No Star				100	
	Total/Ave.	33	22	22	23	
Coastal	5 Stars	75	25			
	4 Stars	87	13			
	3 Stars	88		6		6
	2 Stars	25	25	50		
	1 Star	100				
	No Star	75	25			
	Total/Ave.	73	14	11		2
Eastern	5 Stars	100				
	4 Stars					
	3 Stars					
	2 Stars					
	1 Star					
	No Star					
	Total/Ave.	100				
National	5 Stars	73	7			20
	4 Stars	91	9			
	3 Stars	71	3	20	3	3
	2 Stars	26	11	26	37	
	1 Star	40	20	40		
	No Star	26	7	7	60	
	Total/Ave.	56	7	17	16	4

Source : JICA Study Team

Table A 34 Summary of Survey Result (3/5)

		Management Status (%)				Ownership (%)			
		International		Domestic		Land		Building	
		Chain	Independent	Chain	Independent	Yes	No	Yes	No
Nairobi	5 Stars	33	0	33	33	100	0	100	0
	4 Stars	50	0	0	50	50	50	50	50
	3 Stars	0	0	33	67	71	29	83	17
	2 Stars	0	0	0	100	100	0	100	0
	1 Star	0	0	17	83	86	14	86	14
	No Star	0	0	33	67	67	33	100	0
	Total/Ave.	8	0	21	71	79	21	89	11
Central	5 Stars	100	0	0	0	33	67	100	0
	4 Stars	0	0	0	100	100	0	100	0
	3 Stars	11	0	33	56	56	44	100	0
	2 Stars	0	0	17	83	83	17	100	0
	1 Star	0	0	60	40	40	60	40	60
	No Star	0	0	0	100	100	0	100	0
	Total/Ave.	16	0	28	56	62	38	88	12
Masailand	5 Stars	0	0	100	0	50	50	100	0
	4 Stars								
	3 Stars	100	0	0	0	100	0	100	0
	2 Stars								
	1 Star								
	No Star	100	0	0	0	100	0	100	0
	Total/Ave.	50	0	50	0	75	25	100	0
Western	5 Stars	0	0	100	0	100	0	100	0
	4 Stars	0	0	0	100	100	0	100	0
	3 Stars	0	0	50	50	50	50	50	50
	2 Stars	0	0	0	100	33	67	33	67
	1 Star								
	No Star	0	0	0	100	0	100	100	0
	Total/Ave.	0	0	30	70	50	50	60	40
Coastal	5 Stars	50	0	50	0	67	33	50	50
	4 Stars	0	57	14	29	100	0	100	0
	3 Stars	13	6	31	50	75	25	88	13
	2 Stars	0	0	0	100	100	0	100	0
	1 Star	0	0	0	100	50	50	50	50
	No Star	0	33	0	67	100	0	100	0
	Total/Ave.	9	19	22	50	82	18	88	12
Eastern	5 Stars	0	0	100	0	100	0	100	0
	4 Stars								
	3 Stars								
	2 Stars								
	1 Star								
	No Star								
	Total/Ave.	0	0	100	0	100	0	100	0
National	5 Stars	38	0	54	8	71	29	92	8
	4 Stars	9	36	9	45	91	9	91	9
	3 Stars	11	3	33	53	68	32	86	14
	2 Stars	0	0	7	93	80	20	88	13
	1 Star	0	0	31	69	64	36	64	36
	No Star	11	11	11	67	79	21	100	0
	Total/Ave.	11	6	27	56	73	27	87	13

Source : JICA sTudy Team

Table A 34 Summary of Survey Result (4/5)

		Major Structure (%)					No. of Storeys			Water Supply	
		RC	Steel	Stone	Wood	Others	upto 2	3 to 6	more than 7	Enough	Not Enough
Nairobi	5 Stars	100	0	0	0	0	33	33	33	100	0
	4 Stars	0	0	100	0	0	50	50	0	100	
	3 Stars	71	0	29	0	0	17	50	33	83	17
	2 Stars	75	0	25	0	0	25	50	25	100	
	1 Star	33	0	67	0	0	71	29	0	57	43
	No Star	17	0	83	0	0	20	80	0	50	50
	Total/Ave.	50	0	50	0	0	37	48	15	75	25
Central	5 Stars	67	0	33	0	0	50	50	0	100	0
	4 Stars	100	0	0	0	0	100	0	0	100	0
	3 Stars	11	0	89	0	0	78	11	11	71	29
	2 Stars	0	0	100	0	0	33	67	0	83	17
	1 Star	20	0	80	0	0	80	20	0	80	20
	No Star	0	0	50	0	50	0	100	0	100	0
	Total/Ave.	19	0	77	0	4	63	33	4	83	17
Masailand	5 Stars	0	0	100	0	0	100	0	0	100	0
	4 Stars										
	3 Stars	0	0	0	0	100	100	0	0	100	0
	2 Stars									100	0
	1 Star										
	No Star	0	0	100	0	0				100	0
	Total/Ave.	0	0	75	0	25	100	0	0	100	0
Western	5 Stars	100	0	0	0	0	100	0	0		
	4 Stars	0	0	100	0	0	100	0	0	100	0
	3 Stars	100	0	0	0	0	50	50	0	75	25
	2 Stars	0	0	100	0	0	100	0	0	67	33
	1 Star										
	No Star	100	0	0	0	0	100	0	0	0	100
	Total/Ave.	60	0	40	0	0	80	20	0	67	33
Coastal	5 Stars	100	0	0	0	0	33	67	0	100	0
	4 Stars	43	0	57	0	0	29	71	0	88	13
	3 Stars	41	0	53	6	0	50	50	0	60	40
	2 Stars	25	0	75	0	0	33	67	0	100	0
	1 Star	0	0	100	0	0	50	50	0	100	0
	No Star	50	0	50	0	0	100	0	0	0	100
	Total/Ave.	43	0	54	3	0	49	51	0	71	29
Eastern	5 Stars	0	0	100	0	0	100	0	0	100	0
	4 Stars										
	3 Stars										
	2 Stars										
	1 Star										
	No Star										
	Total/Ave.	0	0	100	0	0	100	0	0	100	0
National	5 Stars	69	0	31	0	0	58	33	8	100	0
	4 Stars	36	0	64	0	0	45	55	0	92	8
	3 Stars	45	0	50	3	3	53	39	8	70	30
	2 Stars	24	0	76	0	0	44	50	6	89	11
	1 Star	23	0	77	0	0	71	29	0	71	29
	No Star	29	0	64	0	7	55	45	0	46	54
	Total/Ave.	39	0	58	1	2	54	41	5	76	24

Source : JICA Study Team

Table A 34 Summary of Survey Result (5/5)

		Complaints on Infrastructure (No. of Repls)				Service Equipments (%)						
		Road	Water	Power	Telecom	Shower	Bath Tab	Soap	Towel	Shampoo	Tel.	TV Set
Nairobi	5 Stars	1	1	0	1	100	100	100	100	100	100	100
	4 Stars	2	2	2	1	100	100	100	100	100	100	100
	3 Stars	4	0	0	1	100	100	100	100	33	100	33
	2 Stars	3	1	1	1	100	75	100	100	0	100	0
	1 Star	4	3	3	4	100	29	100	100	0	71	0
	No Star	3	2	2	2	83	17	83	100	0	50	0
	Total/Ave	17	9	8	10	98	61	98	100	25	82	25
Central	5 Stars	1	1	1	1	100	67	100	100	67	33	0
	4 Stars	1	1	1	1	100	100	100	100	0	100	0
	3 Stars	5	3	3	4	100	33	100	100	44	44	0
	2 Stars	4	2	2	2	100	17	100	100	17	33	17
	1 Star	2	2	2	2	30	30	100	100	0	0	0
	No Star	1	1	1	0	100	100	100	100	50	0	0
	Total/Ave	14	10	10	10	92	56	100	100	32	28	4
Masailand	5 Stars	2	0	0	0	100	50	100	100	100	0	0
	4 Stars											
	3 Stars	1	1	1	1	100	0	100	100	100	0	0
	2 Stars	1	0	1	0							
	1 Star											
	No Star	1	1	1	1	100	100	100	100			
	Total/Ave	5	2	3	2	100	50	100	100	75	0	25
Western	5 Stars	0	0	0	0	100	100	100	100	100	0	0
	4 Stars	1	1	1	1	100	100	100	100	0	100	0
	3 Stars	4	4	4	4	100	100	100	100	25	100	0
	2 Stars	3	3	3	3	67	100	100	100	33	67	0
	1 Star											
	No Star	1	1	1	1	100		100	100	0	100	0
	Total/Ave	9	9	9	9	90	90	100	100	30	80	0
Coastal	5 Stars	3	3	3	3	100	100	100	100	33	100	33
	4 Stars	6	5	5	5	100	71	100	100	29	71	14
	3 Stars	10	9	9	9	100	56	100	100	19	75	25
	2 Stars	3	2	2	2	100	33	100	100	0	33	33
	1 Star	0	0	0	1	100	100	100	100	1000	50	0
	No Star	2	2	2	2	100	25	100	100	0	50	0
	Total/Ave	24	21	21	22	100	60	100	100	17	69	20
Eastern	5 Stars	0	0	0	0	100	0	100	100	100	50	0
	4 Stars											
	3 Stars											
	2 Stars											
	1 Star											
	No Star											
	Total/Ave	0	0	0	0	100	0	100	100	100	50	0
National	5 Stars	7	5	4	5	100	71	100	100	79	57	36
	4 Stars	10	9	9	8	100	80	100	100	40	80	30
	3 Stars	24	17	17	19	100	69	100	100	31	72	17
	2 Stars	14	8	9	8	94	50	100	100	13	56	13
	1 Star	6	5	5	7	86	50	100	100	0	43	0
	No Star	8	7	7	6	93	36	93	100	7	43	0
	Total/Ave	69	51	51	53	96	61	99	100	28	61	15

Source : JICA Study Team

Figure A 3 Average Room Rate and Length of Stay by Tourism Region

