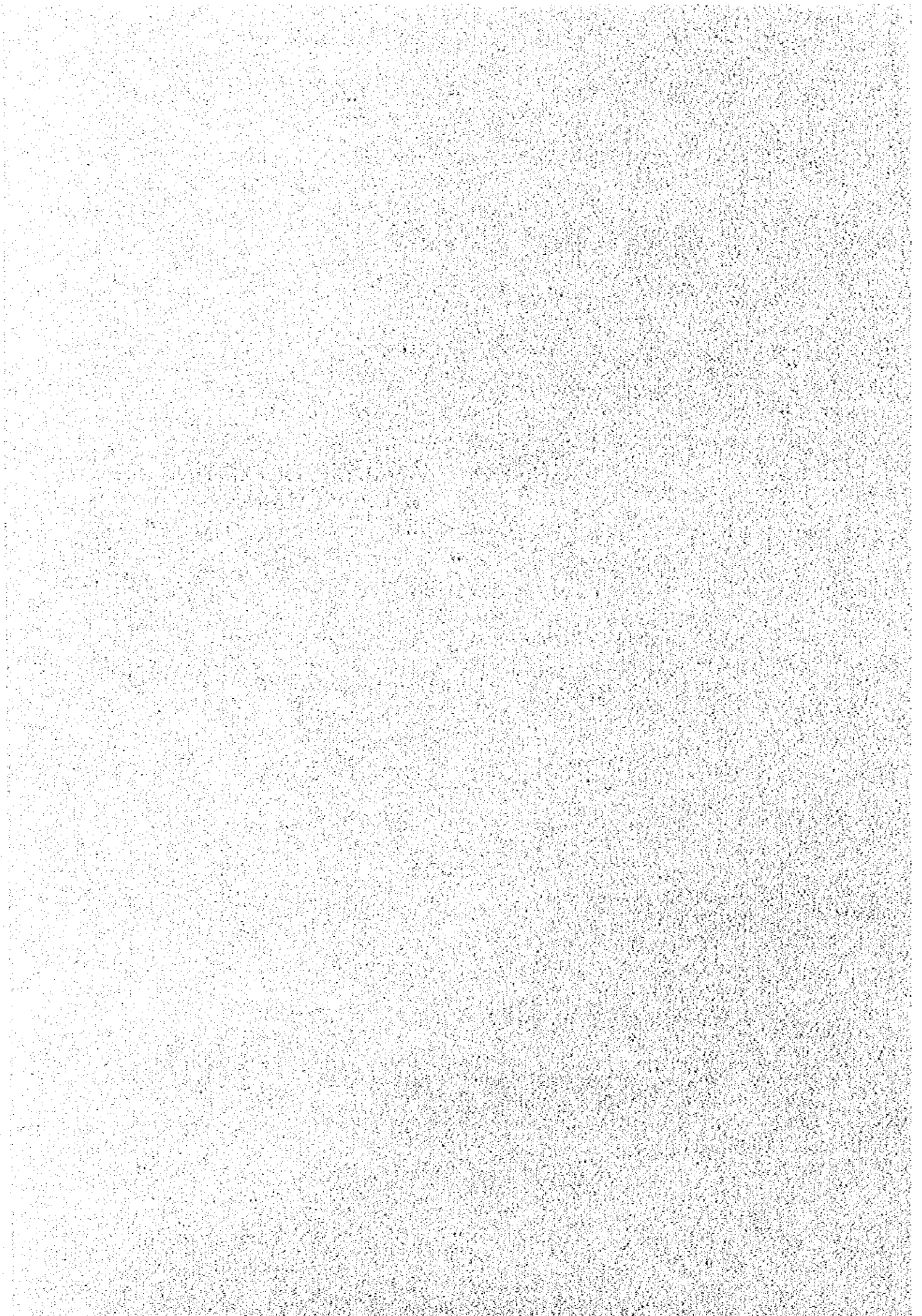


**ANNEX 6 ANALYSIS OF EXISTING
TOURISM MARKET**



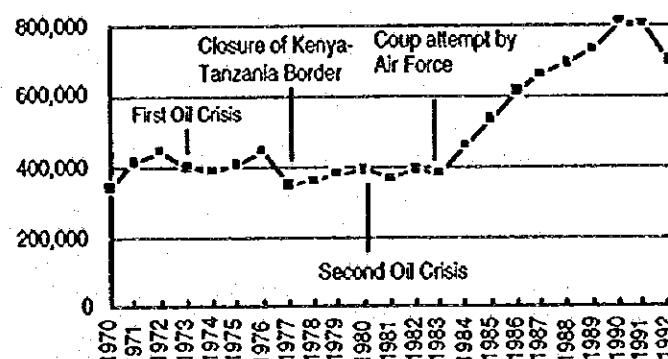
Annex 6 Analysis of Existing Tourism Market

1. International Tourism within Kenya

1.1. Development of International Tourism in Kenya

Kenya received in 1992 some 781,500 international arrivals, which generated 4,746,800 bed-nights. Compared to the previous year, these figures decreased by 13.2% and 12.4%, respectively. Figure A. 21 and Table A. 71 show that past trend of visitor arrivals, bednights occupied by foreign visitors and foreign exchange generated from tourism.

Figure A. 21 International Tourist Arrivals to Kenya



Source: Central Bureau of Statistics

Table A. 71 Visitor Arrivals, Bed-Nights and Tourism Receipts

	Visitor Arrivals	Bed-Nights*	NET Tourism Receipt** (K£s.)	Receipt per arrival (K£s)
1975	407,000	2,290,800	44,500,000	109
1980	365,200	3,518,000	79,800,000	219
1985	540,600	3,737,100	131,000,000	242
1986	614,200	3,962,500	158,700,000	258
1987	661,300	3,992,500	178,000,000	269
1988	694,900	4,089,600	201,500,000	290
1989	734,700	4,296,000	222,300,000	303
1990	814,400	5,002,400	240,600,000	295
1991	804,600	5,421,800	233,500,000	290
1992	781,500	4,746,800	210,400,000	269
Annual growth (1980-92)	6.5%	2.5%	8.4%	1.8%
(1986-92)	4.1%	3.1%	4.8%	0.7%
(1990-92)	-2.0%	-2.6%	-6.5%	-4.5%

* Total bed-nights - permanent occupants - Kenyan residents

** 1982 constant price

Source: Central Bureau of Statistics, Ministry of Tourism and Wildlife

Factors that affected the decline in 1991 and 1992 are:

- Isolated incidents of criminal attacks on tourists in a few travel resorts,
- Political instability during the transition to multiparty system of government,
- Negative press on Kenyan tourism,
- Recession in major tourist generating countries, and
- Tougher competition with new destinations, that is Eastern Europe and the South African Republic as well as with traditional competitors.

1.2. International Tourism by Originating Country

Figure A. 22 and Table A. 72 show the breakdown of bed-nights by region and major countries of residence of international visitor arrivals to Kenya.

Figure A. 22 International Tourism by Region (1992)

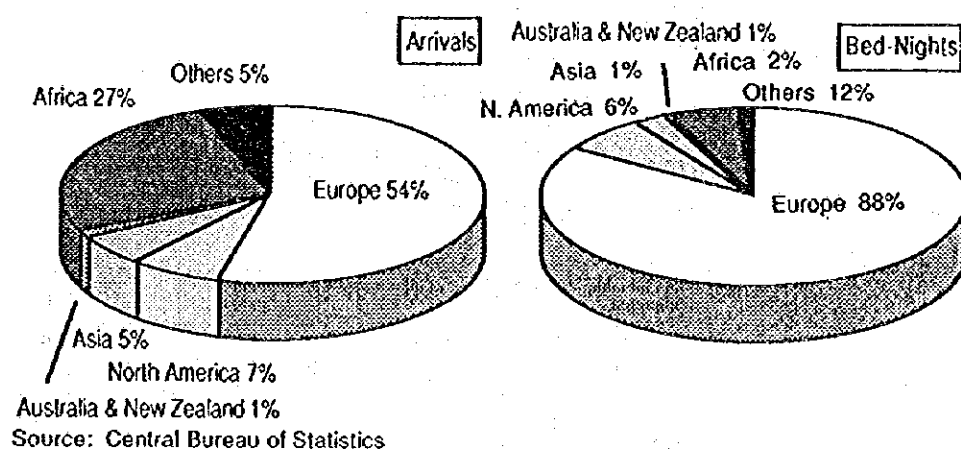


Table A. 72 Bed-Nights Occupied by Major Tourist Generating Countries

	1986	1992	Annual growth	Share
Total	3,962,500	4,746,800	3.1%	100.0%
Germany	1,229,700	1,488,500	3.2%	31.4%
United Kingdom	512,200	1,073,700	13.1%	22.6%
Italy	261,400	366,200	5.8%	7.7%
France	217,600	339,200	7.7%	7.1%
Switzerland	501,800	324,500	-7.0%	6.8%
USA	396,500	276,400	-5.8%	5.8%
Scandinavia	87,700	91,400	0.7%	1.9%
Canada	43,100	47,000	1.5%	1.0%
Tanzania	40,600	35,900	-2.0%	0.8%
Japan	19,100	34,900	10.6%	0.7%
Uganda	61,600	33,000	-9.9%	0.7%
Australia & New Zealand	11,900	29,000	16.0%	0.6%
India	11,700	28,000	15.7%	0.6%
Others	567,600	579,100	0.3%	12.2%

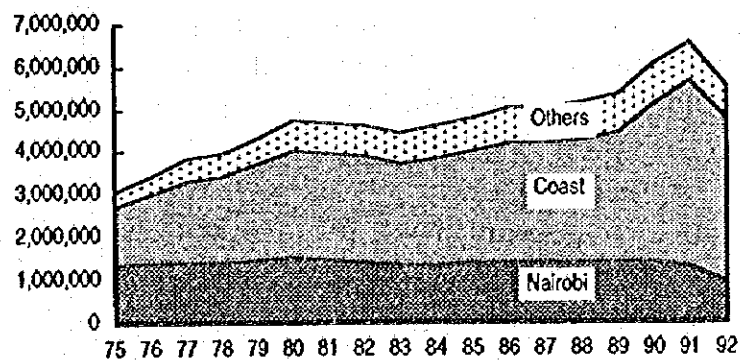
Source: Central Bureau of Statistics

54% of international arrivals and 88% of bed-nights are from Europe. African countries occupy 27% of the arrivals, but they have only a 5% share in the total bed-nights as they tend to make short-term business trips across the border. Germany and UK constitute more than half of the total bed-nights occupied by international visitors. The UK, Japan, Australia & New Zealand and India showed double-digit growth rates during the period from 1986 to 1992. Although statistical data are not available, hoteliers in Kenya agree on the high growth rate of Spanish tourists in recent years.

1.3. Tourism by Geographical Zone

Despite of Kenya's "safari" image, 69% of total bed-nights in 1992 concentrated in the coast as shown in Figure A. 23.

Figure A. 23 Changes in Bed-Nights by Area



Source: Ministry of Tourism and Wildlife

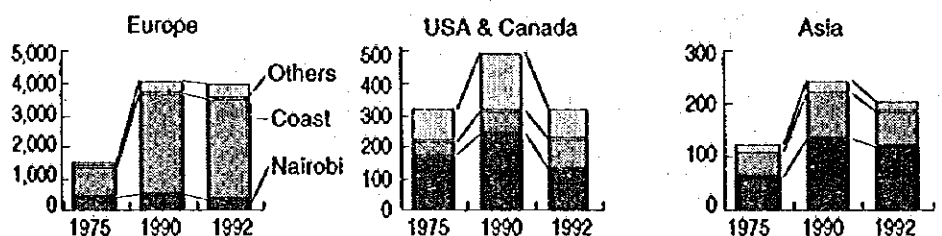
It should be noted, however, that data in the Figures are based on information from classified by authorised hotels. They do not include bed-nights spend in non-classified accommodations, including many lodges in national parks and reserves, camps and private houses. As the Airport Questionnaire Survey suggested (refer to Annex 1), the actual share of the bed-nights spend in the coast would be around 50%.

Bed-nights in the coast have remarkably increased over the past decades. This indicates the vital role of beach resort tourism to expand Kenyan tourism.

The Coastal, Masailand and Western Tourism Regions increased their bed-nights, while Nairobi and all the areas North and North-east of Nairobi showed a decrease. The decrease in bed-nights in Nairobi presumably reflect the worsening of safety conditions and the slump of the Kenyan economy as the city is Kenya's business centre.

Figure A. 24 shows that European countries have made great contributions to develop beach resort tourism in the coastal area. On the contrary, American and Asian visitors spend very little bed-nights in the area, and those, in particular, from North America show a higher share of "other" categories probably for safari purposes.

Figure A. 24 Bed-Night Distribution by Area and Market Segment



Source: Central Bureau of Statistics, Economic Surveys, Various Issues

Interviews with the Kenyan travel trade suggest that the rapid growth in the 1980s was led by "down market" or inexpensive beach resort tourism from Europe to the coast.

1.4. Seasonality

Data that show seasonality are not available, but fluctuation of room rates reflect seasonality. Low season and shoulder season correspond to the two rainy seasons in Kenya :

- Low season (from April to June),
- Shoulder season (from September to mid-December), and
- High season (from July to August, from mid-December to March).

Seasonality is less conspicuous in Nairobi and its vicinity than at the coast, since the city is a business destination that receives visitors throughout the year.

2. Kenyan Tourism in the World Tourism Market

2.1. Overview of World Tourism Market

The total number of tourist arrivals in the world in 1992 reached 476 million reflecting a recovery from the minus growth in 1991 affected by Gulf War to a healthy 4.5% growth as against the previous year.

Table A. 73 shows that the number of visitors to Africa in 1992 was 17 million, with an annual growth rate of 7.6% over the period 1980 and 1992. The high growth rate in Africa was achieved primarily by the growth in the African Mediterranean coast. Africa is the second fastest growth region next to East Asia and the Pacific, though its share in the world tourism market was only 4% in 1992.

Table A. 73 Number of International Visitor Arrivals in the World

	1980	1985	1990	1991	1992	Share	Growth*
Africa	7,070	9,706	14,973	15,845	16,988	4%	7.6%
America	53,703	66,495	93,532	97,503	102,073	21%	5.5%
East Asia & Pacific	19,967	30,389	52,253	53,892	58,322	12%	9.3%
Europe	196,000	214,264	284,178	277,904	287,529	60%	3.2%
Middle East	5,821	6,242	7,479	6,712	7,177	2%	1.8%
South Asia	2,280	2,540	3,179	3,244	3,491	1%	3.6%
World Total	284,841	326,435	455,594	455,100	475,580	100%	4.4%

* Annual growth rates from 1980 to 1992

Source: World Tourism Organization

Major tourist generating countries that show remarkable growth rates are listed in Table A. 74. It is noted that countries in East Asia show higher growth rates than European countries, but they generate very small numbers of international visitors per population. This would indicate a potential for future growth.

Table A. 74 Number of Tourists from Major Tourist Generating Countries

	1980 (000)	1991(000)	Growth per year	Tourists per population
Japan	3,909	10,634	9.5%	8.6%
Korea	339	1,856	16.7%	4.4%
Taiwan	485	3,360	19.2%	16.8%
Hong Kong	916	2,046	7.6%	35.5%
UK	17,507	30,497	5.2%	53.3%
France	8,000	10,100	2.1%	18.0%
Germany	19,700	26,600	2.8%	33.8%
USA	22,365	41,941	5.9%	16.9%
Canada	12,823	21,937	5.0%	83.7%
Australia	1,204	2,099	5.2%	12.5%
World total	285,000	450,000	4.2%	-

Source: WTO, Japan National Tourist Organization

2.2. Shares of Kenya in Major Tourist Generating Countries

In 1992, the number of visitors to Kenya was some 700,000, representing a 0.15% share in the world and a 4.1% share in Africa. Around three -fourths of arrivals in Africa are arrivals to Northern Africa, which has the advantage of a short distance from Europe. The annual growth rate of visitors to Kenya during the same period (1980 to 1992) was 4.9%, which is lower than the African average, but higher than the world average.

As shown in Table A. 75, leading tourist generating countries for Kenya are Germany, Australia, Switzerland, India, France and the United Kingdom. However, Kenya's share of the total outbound and long-haul tourists from the countries is very small.

Table A. 75 Share of Kenya in Major Tourist Generating Countries

	Number of arrivals to Kenya	Share in all destinations	Share in long-haul destinations	Travellers abroad ('91)	Long-haul traveller ('91)
Germany	125,000	0.47%	3.47%	26,600,000	3,600,000
UK	101,900	0.33%	1.99%	30,497,000	5,114,000
France	37,700	0.37%	1.15%	10,100,000	3,282,000
Switzerland	31,200	0.40%	2.38%	7,763,000	1,311,000
USA	40,700	0.10%	0.28%	41,941,000	14,521,000
Canada	9,700	0.04%	0.34%	27,297,000	2,824,000
Australia	9,100	0.43%	-	2,099,000	-
India*	11,700	0.39%	-	3,000,000	-
Japan	8,400	0.08%	0.17%	10,634,000	4,932,000

* Number of travellers abroad from India was estimated by JICA Study Team based on 1980 and 1985 figures.

** Long-haul travellers are those who travelled out of Europe from European countries, those who travelled from the USA for except for travellers to Canada and Mexico, those who travelled from Canada except travellers to USA and those who travelled to Asia and Hawaii except for travellers from Japan.

Source: Central Bureau of Statistics, Japan National Tourist Organization

2.3. Countries with Future Prospects

Diversification of source markets and development of more profitable market segments is essential for Kenyan tourism, as Kenya is too dependent on European packaged beach resort tourists, whose average expenditure per day in Kenya is lower than expenditure for other category of visitors (Table A. 18 refers).

(1) East Asia

Japan, Korea and Taiwan show high growth rates of tourist generation in the past decade as well as a high future potential, as reflected in the small numbers of international travellers per population. The long distance to Kenya is a drawback, but tourist statistics in various countries prove that tourists from these countries are high spenders.

China is achieving an extremely rapid economic growth that could result in a tourism market growth in the future. It is not very clear at this stage if their government's regulation will allow large number of Chinese nationals to travel overseas freely. But attention should be paid to the country with a huge potential market volume.

(2) India

Bed-nights occupied by Indians in Kenya recorded an annual two-digit growth during 1986 and 1992 as already shown in Table A. 72. The Indian economy is showing a healthy growth backed up by a deregulation policy of their government, which could result in the growth of international tourism in the future. Compared to Europe, India's relative proximity to Kenya as well as its ties with Kenya through past immigration and its huge potential market volume would rationalise the consideration as a future target market.

3. Domestic Tourism in Kenya

In 1993, 895,000 bed-nights were occupied by Kenyan residents as shown in Table A. 76. A sharp decrease in 1992 was probably due to the election taken place in that year. Although more moderate than the international market, the domestic market has been growing at a healthy rate during the past decade.

The actual size of the market should be larger than these figures suggest, since they are based on reports submitted by authorised accommodations, in spite of the fact that many Kenyans stay at relative/friend's home and non-classified hotels. In spite of this, the domestic market is a large market segment only next to Germany and United Kingdom occupying around 15% of the total bed-nights.

Table A. 76 Change in Bed-Nights Occupied by Kenyan Residents

	Kenyan residents	Share in total bed-nights	International visitors **
1975	578,600	20%	2,290,800
1980	789,000	18%	3,518,000
1985	819,900	18%	3,737,100
1986	837,100	17%	3,962,500
1987	847,500	18%	3,992,500
1988	853,900	17%	4,089,600
1989	829,400	16%	4,296,000
1990	875,500	15%	5,002,400
1991	938,000	15%	5,421,800
1992	655,800	12%	4,746,800
1993	895,000	15%	5,211,700
1980-1992*	1.0%	-	2.6%
1986-1992*	1.0%	-	3.1%
1990-1992*	0.7%	-	1.4%

* Annual growth

** Excludes permanent occupants

Source: Central Bureau of Statistics

As shown in Table A. 77, bed-nights at the coast constitute almost half of the total bed-nights occupied by Kenyan residents, reflecting their preference for beach holidays. The share of the coast in the total bed-nights generated by Kenyan residents is higher than that of the visitors from America and Asia, but lower than the share of those from Europe.

Table A. 77 Bed-Nights Occupied by Kenyan Residents by Area

	1975	1993	1993 share	Annual growth
Total	578,600	894,900	100%	2.5%
Coast	245,900	404,500	45%	2.8%
Nairobi	178,500	183,300	20%	0.1%
Others	154,200	307,100	34%	3.9%

Source: Central Bureau of Statistics

Interviews with travel agents in Kenya revealed that the peak season for domestic travel is August and December, since it corresponds to school holidays. There is also a short peak in April for the Easter holiday.

The domestic market is important as it has a considerable market volume. Moreover, it serves to diversify business risks for the Kenyan travel trade, as the market is less influenced by the economic situation in Europe. In addition to these economic reasons, domestic tourism should be promoted to promote mutual understanding of Kenyans living in different regions and diverse background.

4. Visitor Arrivals to National Parks, Reserves and Tourist Facilities

Figure A. 25 and Table A. 78 shows the number of visitor arrivals to national parks/reserves and cultural facilities, including national monuments and museums.

Figure A. 25 Numbers of Visitor Arrivals to Parks/Reserves and Cultural Facilities by Tourism Region

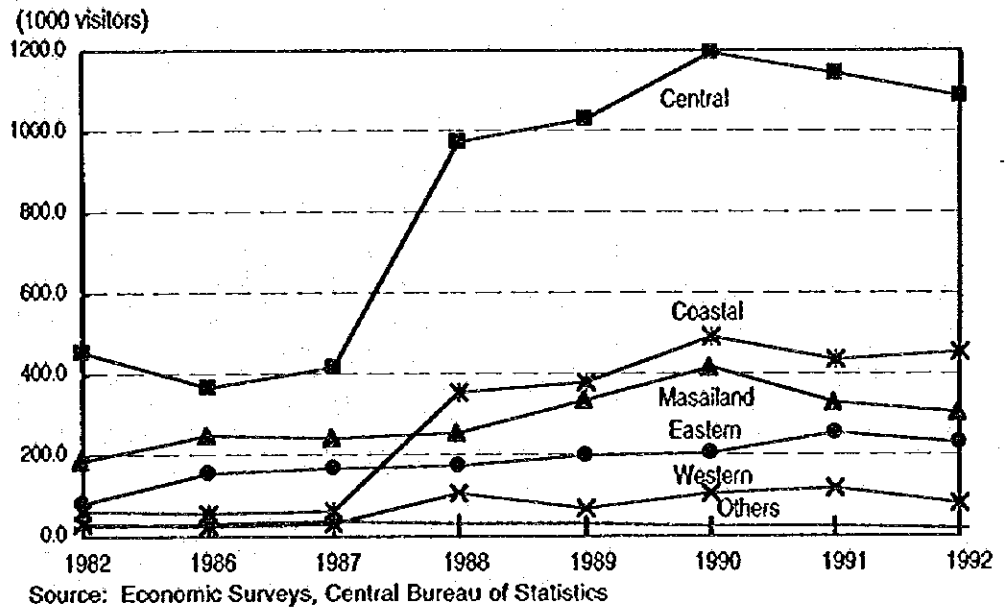


Table A. 78 Number of Visitor Arrivals to Parks/Reserves and Cultural Facilities by Tourism Region

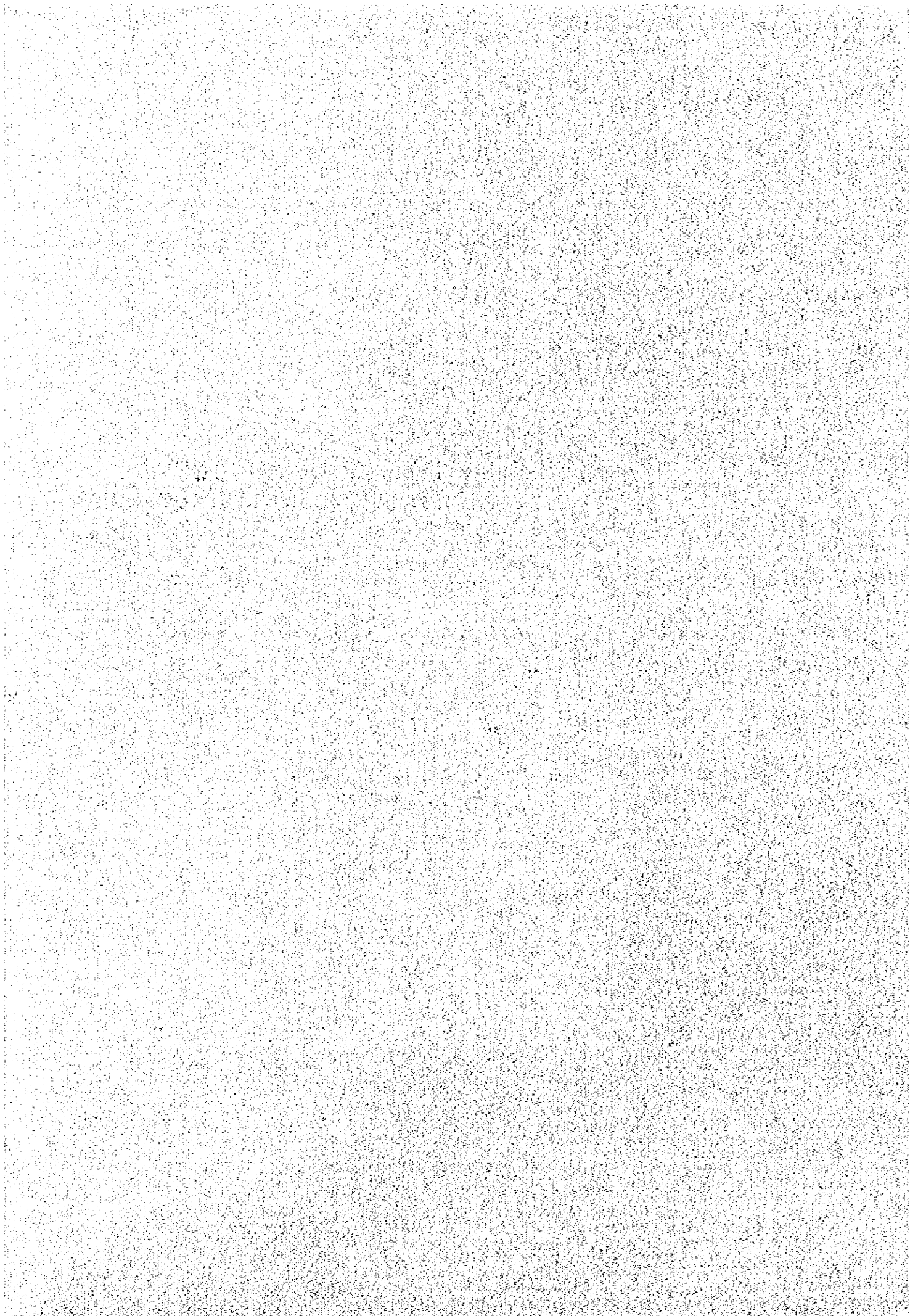
Name	Number of visitors							Annual growth	
	1986	1987	1988	1989	1990	1991	1992	90/86	92/90
Central Total	370.8	417.6	976.6	1033.3	1194.0	1141.6	1085.9	34%	-5%
National Park/Reserve	370.8	417.6	508.9	529.3	657.2	673.0	582.7	15%	-6%
National Monument/Museum/Other	0.0	0.0	467.7	504.0	536.8	468.6	503.2	(7%)	-3%
Masailand Total	248.3	244.4	259.0	340.0	417.7	332.5	306.4	14%	-14%
National Park/Reserve	248.3	244.4	256.5	336.6	417.7	332.5	306.4	14%	-14%
National Monument/Museum/Other	0.0	0.0	2.5	3.4	0.0	0.0	0.0	-	-
Western Total	25.6	31.2	106.0	70.9	104.3	118.3	84.1	42%	-10%
National Park/Reserve	25.6	31.2	32.8	16.2	53.8	53.0	39.4	20%	-14%
National Monument/Museum/Other	0.0	0.0	73.2	54.7	50.5	65.3	44.7	-(17%)	-6%
Turkana	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	-
Northern	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	-
Tana	20.1	26.8	23.7	17.4	11.1	9.1	7.1	-14%	-20%
Coastal Total	59.1	63.0	355.4	383.1	491.9	436.7	454.0	70%	-4%
National Park/Reserve	59.1	63.0	90.7	114.2	172.3	180.9	188.9	31%	5%
National Monument/Museum/Other	0.0	0.0	264.7	268.9	319.6	255.8	265.1	(10%)	-9%
Eastern	158.2	170.2	172.7	197.9	206.3	255.2	228.6	7%	5%
Others	12.2	12.8	10.5	13.4	13.8	14.8	14.0	3%	1%
National Total	882.1	953.2	1,893.4	2,042.6	2,425.3	2,293.4	2,166.1	29%	-5%
National Park/Reserve	882.1	953.2	1,085.3	1,211.6	1,518.4	1,503.7	1,353.1	15%	-6%
National Monument/Museum/Other	0.0	0.0	808.1	831.0	906.9	789.7	813.0	(6%)	-5%

Note: () Annual growth 1988-1990

Source: Economic Surveys, Central Bureau of Statistics

Total number of arrivals amounted to 2.4 million in 1990, of which 1.5 million were to national parks and reserves and 0.9 million to cultural facilities. The Central Tourism Region occupies around 50% of total visitor arrivals, followed by the Coastal Region and Masai Mara. The trend has been in an upward curve until 1990, but it was crippled by the security problems and recession in Europe. The trend roughly corresponds to that of international visitor arrivals to Kenya.

**ANNEX 7 ANALYSIS OF EXISTING TOURIST
FACILITIES AND INFRASTRUCTURE**



Annex 7 Analysis of Existing Tourist Facilities and Infrastructure

1. Tourist Facilities

1.1. Accommodation Facilities

1.1.1. Registration and Classification

For a long time, Kenya has been encouraging the development of tourist accommodation facilities and has achieved quite successful results. The results of statistical studies varied. However, this chapter is based mainly on data from the Licensing Section of the Tourism Department, MOTW. According to the data, there were 2,406 accommodation facilities all over the country both, registered and non-registered in 1992. Table A. 79 shows the number of accommodation facilities categorised on the basis of registration, licensing and classification system.

Table A. 79 Registration, Licensing and Classification Status of Accommodation Facilities, 1992

	Registered				Not registered	Total
	Licensed			Not Licensed		
	Valid		Expired			
	Classified	Not classified				
No. of Facilities	226	81	475	330	1,294	2,406
%	9.5	3.2	19.7	13.7	53.8	100

Source : Licensing Section, Tourism Department, MOTW

Out of the total, about half or 46.2% of the facilities are officially registered. Only 226 facilities, that is 9.5% of the total, are both, licensed and classified. Some 475 facilities had expired licenses.

MOTW has detailed classification criteria ranking 14 major and 121 minor items for the classification of 1 to 5 stars hotels, and 95 items for 1 to 5 stars lodges. Table A. 80 shows major criteria for hotel classification. Criteria for hotels and lodges are similar. Only some details, such as restaurant capacity and water storage capacity, which are required for rather isolated facilities, differ. These criteria are specified quite in detail, while others depend upon the subjectivity of the inspectors. Moreover, the criteria have very strict requirements, so most of the facilities do not meet all these criteria except for high standard 5 and 4 star hotels. It may be necessary to simplify and clarify these criteria for better application.

Table A. 80 Major Criteria for Hotel Classification

Section-Item	One Star Hotel	Two Star Hotel	Three Star Hotel	Four Star Hotel	Five Star Hotel
1. Location & Building					
1.1 Site & Environment	The building, its entrance and its location should be suitable for Hotel	As for one star	The locality and environment including the outlook shall be suitable for a hotel	The locality and environment including the outlook shall be suitable for a hotel of international standard	The locality and environment including the outlook shall be suitable for a hotel of high international standard
1.2 Capacity	The hotel should have at least 10 eligible bedrooms	As for one star	As for one star	As for one star	As for one star
2. Lobby, Lounge & other public areas					
2.1 Minimum Size of Public Rooms	Minimum size of lobby/lounge, meeting rooms, bars and covered terrace should not be less than 1/2 sq.m per guest bed	As of one star	Minimum size should be 1 sq.m per guest bed	Minimum size should be 1 1/2 sq.m per guest bed	Minimum size should be 2 sq.m per guest bed
3. Conference & Banquet Rooms	Not required	One small meeting room with furniture to match the general standard of the hotel	One large comfortable furniture and well maintained	One large room and two small ones carpeted, well lighted and maintained furniture, furnishing and fittings to be very good quality and P.A. system for the large room. High quality decoration except of vacation hotels which should be as for three stars	One large room and two small rooms carpeted, well lighted and maintained. Highest quality of furniture, furnishing fittings and decoration. P.A. system for the larger room
4. Restaurant					
4.1 Features and Facilities	One restaurant well furnished, maintained, ventilated and lighted	As for one star	As for one star not with a coffee shop or a snack bar in addition. Size of restaurant to be in proportion to the size of the hotel	At least two restaurants including a grill room plus a coffee shop. Total seating capacity should be at least 50% of hotel capacity for town hotels and 100% for vacation hotels	As for four stars but all high quality equipment. Where a la carte is applied, a quonon service must be provided
5. Guest Room					
5.1 Minimum Size	Minimum size of bedrooms should be 12 sq.m	Minimum size to be 15 sq.m	Minimum size to be 15 sq.m	Minimum size to be 18 sq.m	Minimum size to be 18 sq.m
5.2 Suites	Not required	Not required	At least 2% of town hotel or 1% of vacation hotel rooms should be suites equipped with high quality furniture and fittings, wall-to-wall carpeting	At least 3% of town hotel rooms and 2% of vacation hotel rooms should be suites in permanent set up. Very high quality furniture and fittings. Wall-to-wall carpeting, telephone extension should be provided in both sitting and bedrooms. Refrigerator should be provided. At least one executive suite.	At least 5% of town hotel rooms and 3% of vacation hotel rooms should be suites with the highest quality furniture fittings and furnishings. The suites must be in permanent set up with telephone extension in sitting and bedrooms. Refrigerator to be provided. At least two executive suites.
6. Bathroom					
6.1 Ratio of Rooms with Private Bathrooms	At least 75% of all the rooms should have private bathrooms and common bathrooms should be one for every three guest rooms	At least 90% of all the rooms should have private bathrooms and common bathrooms should be one for every two guest rooms	As for two star	As for two star	As for two star
6.2 Size of Bathrooms	Every bathroom should not be less than 3.5 sq.m	As for one star	Size should not be less than 5 sq.m	Size should not be less than 6 sq.m	As for four stars
7. Hygiene & Sanitation					
7.1 Refuse Disposal	There should be refuse disposal system which meets the local health standards	As for one star	As for one star	As for one star	As for one star
7.2 Sewage	All drainage must be connected to the sewage system of the town where applicable, where there is no sewerage system, it should be connected to septic tank of an approved size and soakage pit over other approved form of effluent disposal	As for one star	As for one star	As for one star	As for one star
7.3 Water Supply	Drinking water must be properly treated if not from any approved source	As for one star	As for one star	As for one star	As for one star
7.4 Water Storage	There should be enough storage capacity to last at least one day in case of a breakdown in supply	The storage capacity should be for three days	The storage capacity should be for five days	The storage capacity should be for seven days	As for four star
8. Sundry Service					
8.1 Telex Facility	Not required	Not required	Telex facility available	As for three star	As for three star
9. Personnel					
9.1 Ratio of Staff to Bed Capacity	The ratio of staff to number of beds should be 0.8 to one	The ratio should be 0.8 to one	The ratio should be 0.9 to one for town hotel, and 1.0 for vacation hotel	The ratio should be 1.0 for town hotel, 1.2 for vacation hotel	The ratio should be 1.2 for town hotel, 1.5 for vacation hotel
10. General					
10.1 Swimming Pool	Not required	A swimming pool of adequate size should be provided for vacation hotel. Well maintained	A swimming pool of adequate size should be provided for all categories. Must be well maintained	Large swimming pool of not less than 100 sq.m for all categories. Must be well maintained, should be of high standard of finishing	As for four star
10.2 Health Club	Not required	Not required	Not required	Well equipped sauna and gymnasium steam bath, whirlpool, Turkish bath and massage	As for four stars but of high quality and an instructor for gymnasium

Source: Ministry of Tourism and Wildlife

1.1.2. Distribution of Accommodation Facilities

Figure A. 26 and Table A. 81 present the current distribution of classified hotel and lodges and non-classified facilities over tourism regions. As shown, the Coastal Tourism Region has the largest stock of 51.8% of the national total or 18,292 beds: 4 star hotels share 6,402 or 32.5% of the regional total, followed by 5 star and 3 star hotels, which accounted for 5,817 and 3,930 beds, respectively.

Figure A. 26 Geographical Distribution of Hotels and Lodges

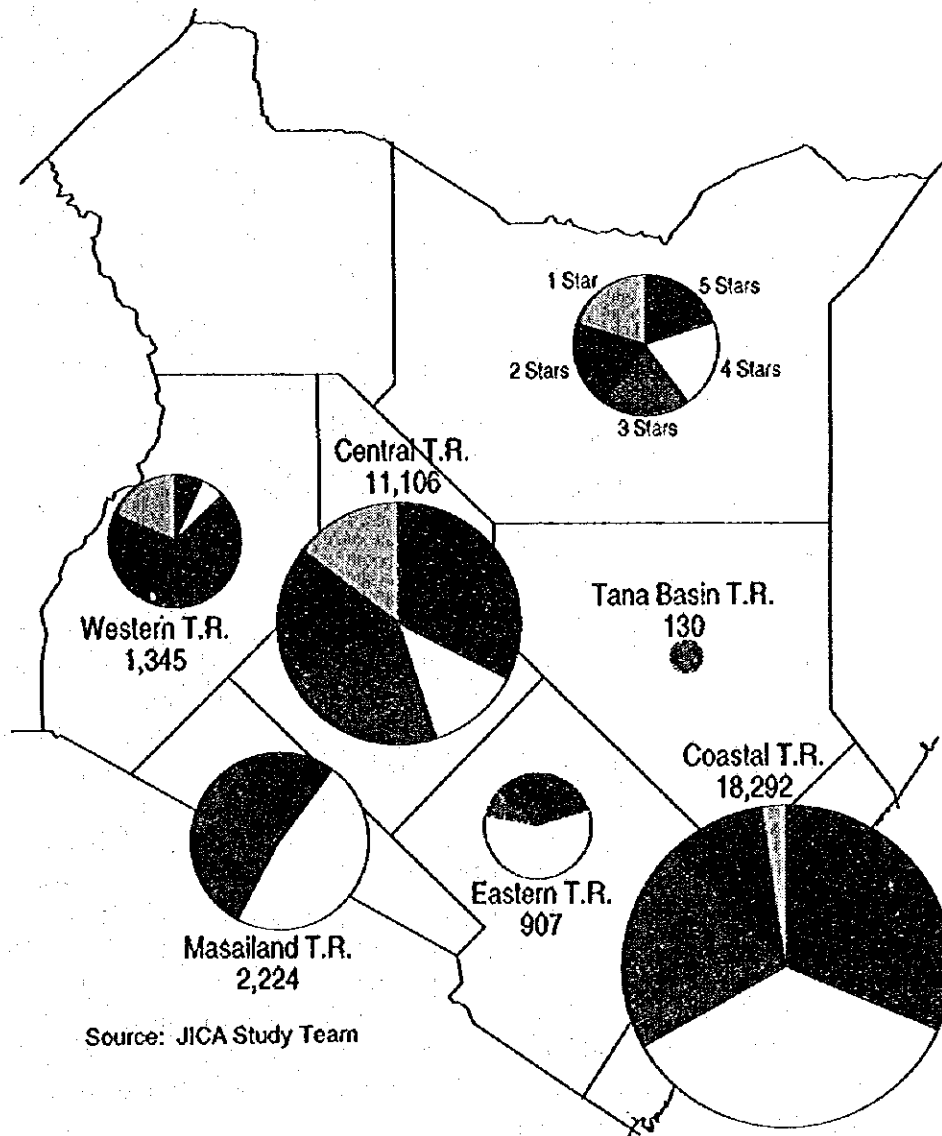


Table A. 81 Number of Beds of Classified Hotels and Lodges

Tourism Region	Classified					Non-classified	Total
	5 Star	4 Star	3 Star	2 Star	1 Star		
Central Region	3,671	1,339	2,680	1,813	1,603	762	11,868
% in the Region	30.9%	11.3%	22.6%	15.3%	13.5%	6.4%	100.0%
% in the National	36.7%	14.3%	32.9%	43.5%	70.5%	19.1%	31.2%
Masailand Region	232	1,054	774	164	0	1,251	3,475
% in the Region	6.7%	30.3%	22.3%	4.7%	0.0%	36.0%	100.0%
% in the National	2.3%	11.2%	9.5%	3.9%	0.0%	31.3%	9.1%
Western Region	100	77	570	354	244	176	1,521
% in the Region	6.6%	5.1%	37.5%	23.3%	16.0%	11.6%	100.0%
% in the National	1.0%	0.8%	7.0%	8.5%	10.7%	4.4%	4.0%
Turkana Region	0	0	0	0	0	64	64
% in the Region	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%	100.0%
% in the National	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%	0.2%
Northern Region	0	0	0	0	0	48	48
% in the Region	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%	100.0%
% in the National	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.1%
Tana Basin Region	0	0	130	0	0	12	142
% in the Region	0.0%	0.0%	91.5%	0.0%	0.0%	8.5%	100.0%
% in the National	0.0%	0.0%	1.6%	0.0%	0.0%	0.3%	0.4%
Coastal Region	5,817	6,402	3,930	1,715	428	1,404	19,696
% in the Region	29.5%	32.5%	20.0%	8.7%	2.2%	7.1%	100.0%
% in the National	58.1%	68.1%	48.2%	41.1%	18.8%	35.1%	51.8%
Eastern Region	185	524	74	124	0	278	1,185
% in the Region	15.6%	44.2%	6.2%	10.5%	0.0%	23.5%	100.0%
% in the National	1.8%	5.6%	0.9%	3.0%	0.0%	7.0%	3.1%
National Total	10,005	9,396	8,158	4,170	2,275	3,995	37,999
% in the National	26.3%	24.7%	21.5%	11.0%	6.0%	10.5%	100.0%
% in the National	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Ministry of Tourism and Wildlife

The second largest stock topped by 5 star hotels (3,671 beds) is in the Central Tourism Region, followed by 3 star and 4 stars hotels. The Coastal and Central Region, have a combined share of 83% of the national total and a stock of 9,488 beds at 5 star hotels, with a national total of 95.8 %, play a dominant role in national tourism. Some 3,475 beds or a stock of 9.1% are located in the Masailand Region, which is occupied mostly by safari lodges. The Western and Eastern Region share the rest, but their individual characteristics are different. The Eastern Region depends solely on safari tourism in Tsavo National Park, while the Western Region is diversified, because of its resources, thus the types of facilities range from mountain resorts to lakeside game lodges in a rather moderate style. The Tana Basin Region has two facilities with 142 beds. They are located in Meru National Park and have therefore a strong relationship with the Central Tourism Region through Meru City.

In addition to the above mentioned classified hotels and lodges, there exist some interesting and important non-classified facilities as shown in Table A. 82. They can be roughly categorised into four types, that is private ranches, home-stays, tented camps and grass shacks. Among these four types, tented camp has the biggest stock of 29 establishments with 1,388 beds, mostly located in the Central, the Masailand and the Eastern Region for game safaris. The average size of these tented camps is 47 beds per establishment, but some of them have over 100 beds and they are supported by annexed facilities that enable guests to enjoy their stay with hotel level amenities.

Table A. 82 Non-classifieds Accommodation Facilities of Other Types

Tourism Region	Tented Camp		Private Ranch		Home-stay		Grass Shack		Region Total	
	No. of Fac.	No. of Beds	No. of Fac.	No. of Beds	No. of Fac.	No. of Beds	No. of Fac.	No. of Beds	No. of Fac.	No. of Beds
Central	6	190	12	122	9	56	0	0	0	0
Masailand	16	956	2	14	1	19	0	0	19	989
Western	1	16	0	0	4	38	0	0	5	54
Tana Basin	1	12	0	0	0	0	0	0	1	12
Coastal	1	16	0	0	8	179	5	148	14	343
Eastern	4	198	1	8	0	0	0	0	5	206
Total	29	1,388	15	144	22	292	5	148	71	1,972

Source : Kenya's Best, Nairobi

1.1.3. Occupancy Rates, Length of Stay and Room Rates

Table A. 83 presents occupancy rates, average room rates, and average length of stay during the facilities survey conducted by the study (Table A. 34 refers). According to survey, the average annual occupancy rate of all the surveyed accommodation facilities was 63%.

Table A. 83 Major Indicators of Accommodation Facilities

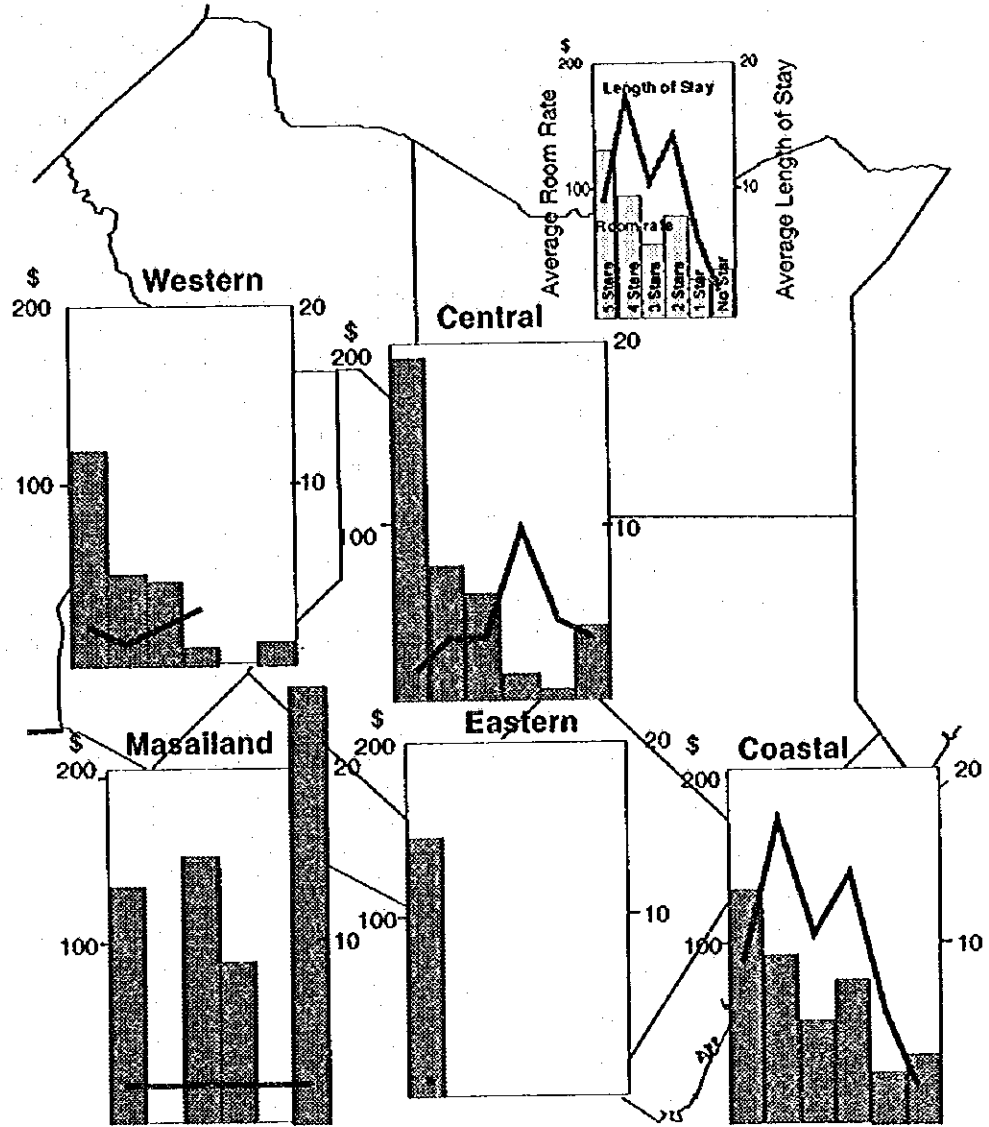
Tourism Region	No. of Facilities	No. of Rooms	Ave. No. of Rooms	Ave. Occ Rate (%)	Ave. Rate (US\$)	Ave. Len. of Stay	
Central	5 Star	7	915	131	73	189	2
	4 Star	3	333	111	68	75	4
	3 Star	18	1,325	74	58	62	4
	2 Star	11	481	44	41	22	10
	1 Star	14	376	27	49	15	5
	No Star	6	178	30	68	37	4
Masailand	5 Star	2	59	30	63	168	2
	4 Star	0	0	0	0	0	0
	3 Star	1	75	75	70	175	2
	2 Star	1	26	26	na	140	na
	1 Star	0	0	0	0	0	0
	No Star	1	51	51	60	242	2
Western	5 Star	1	50	50	na	120	2
	4 Star	1	45	45	46	50	1
	3 Star	4	285	71	50	48	2
	2 Star	3	69	23	45	13	3
	1 Star	0	0	0	0	0	0
	No Star	1	26	26	35	15	na
Coastal	5 Star	4	944	236	72	134	9
	4 Star	8	1,376	172	66	95	17
	3 Star	17	1,475	87	67	57	11
	2 Star	4	258	65	58	84	14
	1 Star	2	65	33	45	32	6
	No Star	4	179	45	55	38	2
Eastern	5 Star	2	100	50	90	148	1
	4 Star	0	0	0	0	0	0
	3 Star	0	0	0	0	0	0
	2 Star	0	0	0	0	0	0
	1 Star	0	0	0	0	0	0
	No Star	0	0	0	0	0	0

Note: na = not available

Source: Tourist Facility Survey, JICA Study Team, 1994

The highest occupancy and room were revealed by rates 5 star hotels of the Central and Coastal Regions, followed by the Masailand's 3 star, the Central's 4 star, and the Coastal's 3 and 4 star hotels. The show that the major tourist resorts and high class hotel establishment operate successfully. On the other hand, the rates in the Western Regions are rather low with good operation of the facilities and diversification of destinations, tourism promotion in the Western Tourism Region can be successful promoted.

Figure A. 27 Average Room Rates & Length of Stay



Source: JICA Study Team

The average length of stay also reflects on tourism styles in Kenya. The longest stays are at the Coastal's 2, 3 and 4 star hotels, topped by 30 nights at a 4 star hotel, reflecting beach resort tourism. The Central's moderate length of stay, 2 to 4 nights, shows its role as a gateway. The Masailand's and the Eastern's quite short length of stay, 1 to 2 nights, is a result of the circular safari tourism.

The average room rate ranges widely, from US \$ 13 to US \$ 189. The highest is that of 5 star hotels in the Central Region with a maximum rate of US \$ 256. It is followed by those of 5 star safari type accommodations in the Masailand and the Eastern Region, then 5 star

hotels of the Coastal Region with US \$ 134, all of which are beach resort hotels. When examining expenditure at one accommodation facility by multiplying average room rate and length of stay, the Coastal Region has highest rates, caused by its long length of stay. That of 2, 4 and 5 star hotels reach over US \$ 1,000 and are topped by US \$ 1,615 for 4 star hotels. Other regions' expenditures per tourist per average length of stay are under US \$ 484, that is that of a non-classified safari club.

1.1.4. Kenya Tourist Development Corporation (KTDC)

KTDC is a parastatal organisation with the responsibility of supporting tourism development in Kenya. In this sub-section, the KTDC's achievement and programme in hotel construction is discussed. For information on its organisation and role please refer to in Annex 4.

Table A. 84 presents the accommodation facilities either wholly or partly owned by KTDC. In 1992, KTDC either wholly or partly owned 32 hotel accommodation establishments with 5,760 beds, representing about percent of the total national bed capacity in classified hotel establishments.

Table A. 84 KTDC Owned Hotels and Lodges

Tourism Region	No. of Hotels	No. of Beds
Central	14	3,065
Masailand	2	348
Western	7	637
Turkana	0	0
Northern	1	48
Tana Basin	1	130
Coastal	4	1,232
Eastern	3	300
Total	32	5,760

Source : KTDC Annual Report, 1992

The future programmes of KTDC concerning hotel construction are summarised in Table A. 85. Among these eight programmes, the District Focus Hotels' Programme is expected to promote diversification of tourists, by introducing local new destination developments. The KTDC and the MOTW have identified 20 urban and district centres with potentials for medium and small size hotel development. This programme was prepared several years ago, but financial constraints have prevented its implementation.

Table A. 85 Proposed KTDC Projects (1993/4-1996/7)

Name	Location	Description	Project Cost Mil. KS	Priority
Mombasa Island Hotel	Mombasa Island	5 stars hotel with 160-200 rooms	359	High
Meeting Point Plaza	Nairobi City Centre	Use change of the Kenya National Travell Bureau to tourism related use	230	High
Extension of Sunset Hotel	Kisumu	Add 54 doubles, 6 suits and 7 flats	70	High
Aberdare Forest Lodge	E. of Aberdare NP	40 rooms lodge with 1.6 ha site	34	Medium
Amusement Park	Langata, Nairobi	Under Study	230	Medium
District Focus Hotels' Programme		20 medium and small scale hotels with 1,100 rooms in total, Nakuru, Kitale, Kisii, Busia, Othaya, Narok, Machakos, Muranga, Siaya, Marsabit, Kitui, Lodwar, Garissa, Isiolo, Voi, Bomet, Nyamira, Vihiga, Makeni, Chuka	21	Medium
Floating Ship Hotel	Lake Victoria	Vessel with 40 cabins, or 30 cabins with saloon	690	Other
Fourteen Falls Hotel	Thika, Kiambu	A lodge of 50 beds	23	Other

Source : KTDC: Annual Report and Accounts, 1991/92

1.2. Restaurants

Kenya has a large stock of restaurants with a wide range of prices and cuisine, which offer tourists a large selection. However, their locational distribution is quite limited. According to the Licensing Section of the MOTW, Kenya has 350 licensed restaurants as presented in Table A. 86. 58% of the licensed restaurants are concentrated in Nairobi, and 26% at the Coastal Area. The remaining areas have only 56 or 16% restaurants of the restaurants. Most tourists, thus, are forced to have their meals at hotel restaurants during their trips to regions other than Nairobi or the Coastal Area. It can be said that there exists a high potential for developing restaurants and that kind of facilities. This development will support local tourism attractions and tourist diversification as well as generate revenues from tourism industry and employment for local people.

Table A. 86 Licensed Restaurants, 1990

Nairobi		Coast		Other Areas		Total	
Number	%	Number	%	Number	%	Number	%
202	58	92	26	56	16	350	100

Source : Licensing Section, Tourism Department, MOTW

Restaurants are classified into three categories by the MOTW Licensing Section, that is into 3, 4 and 5 star restaurants. The criteria of classification are almost corresponding to those of hotel restaurants, as referred to in Table A. 86. The criteria require 12 seats as a minimum capacity for an independent restaurant. It also requires essential

systems and equipment for hygiene, fire protection and electrical safety, refuse disposal and sewerage, to meet the local regulations.

1.3. Other Tourist Facilities

1.3.1. Golf Courses

Golf is quite a popular sport in Kenya and a big attraction of Kenyan tourism. The Kenyan government is promoting golf tourism under the slogan of "Golf and Game on the Equator". The country has the advantage of low temperatures and dry air in the highlands. There are 35 golf courses in the country as shown in Table A. 87. Thirty of them are located in the highland area of the Central and Western Tourism Region, while 4 are located in Coastal and 1 in the Masailand Regions. Thirteen courses are within a day-trip distance from Nairobi, and other 7 are within a weekend-trip's distance. Most of the golf courses are situated close to other attractions like national parks, reserves and coastal resorts. Almost all of them have good and well maintained facilities. Some 13 golf courses out of 35 are assigned as championship courses.

Table A. 87 Golf Courses in Kenya

Tourism Region	18 Hole Course		9 Hole Course		Total	
	Championship		Championship		Championship	
Central	7			15	7	15
Masailand				1		1
Western	1		3	4	4	4
Coastal	1	1	1	1	2	2
Total	9	1	4	21	13	22

Source : Rhinos on the Rough, Golfer's Guide to Kenya, Nairobi, 1993

1.3.2. Conference and Convention Facilities

Conference and convention tourism is another type of tourism with increasing importance. Most higher class city and resort hotels are equipped with facilities, even if it is just a meeting room for 20 persons. Among these, the Kenyatta International Conference Centre (KICC) is leading for International Conference. In recent years, occupancy rate and attendants have been declining gradually reaching a low point in 1988 and 1989, but an increasing tendency can be seen thereafter as shown in Table A. 88. The KICC is now under rehabilitation so as to remain a flag ship facility for Conference and Convention tourism.

Table A. 88 Conferences at KICC

	No. of Conference	Conference Day	Attendants	Occupancy (%)
1981	40	263	9,500	72.1
1983	36	176	13,970	48.2
1985	35	197	28,844	54.0
1987	58	176	7,411	48.2
1989	32	111	5,510	30.4
1991	14	149	9,750	40.8

Source : Economic Survey

1.3.3. Tourist Information

For an enjoyable and successful trip, information about local resources and society is essential. This information should be compiled in reference materials, but the most useful and reliable is information from local authorities through the tourist information office. In Kenya, there are only two official tourist information offices, namely in Nairobi and Mombasa. The KWS local offices can also assist tourists. However, the MOTW's information office must be improved and located in major tourist destinations. These local information offices also contribute to the promotion of local tourism as well.

1.4. Tourism Related Public Facilities

1.4.1. Public Safety

Public safety, or tourists' safety is an essential factor for tourism promotion. Kenya has installed security systems and respective facilities all over the country. But in recent years, safety and security are constraints which have adversely affected tourism growth or tourism promotion there are plans to establish a tourist police. It is necessary to increase the number of rangers in national parks and reserves and equip them well to guarantee the safety of tourists.

1.4.2. Fire Protection

Fire protection service is necessary for tourism development. In the areas of normal tourism development improvement of fire protection facilities should be planned together with consideration of local development needs. In the specific areas of intensive tourism development, some adequate facilities and equipment should be provided, such as big ladder trucks, chemical fire engines and a local fire alarm system.

1.4.3. Health Facilities

Every District in Kenya has at least a District hospital and several health centres, dispensaries and clinics. Table A. 89 shows distribute

of health institution by Tourism regions'. There are enough facilities for the emergency care of tourists. In case of an accident, tourists will receive first aid at local hospitals and are then moved to Nairobi's best hospitals, thus local facilities are expected to give only first aid treatment. As far as first aid is concerned, it is urgently necessary to improve emergency transportation by providing light planes or helicopters. A development plan of tourism should take such transportation systems for tourists' first aid into consideration.

Table A. 89 Health Facilities by Tourism Region

Tourism Region	Hospital	Health Centre	Dispensary	Clinic	Others	Total
Central	63	172	522	180	16	953
Masailand	5	21	86	6	0	118
Western	58	232	460	238	29	1,017
Turkana	4	7	36	0	0	47
Northern	7	12	30	0	0	49
Tana Basin	3	7	59	3	0	72
Coastal	12	31	84	5	2	134
Eastern	7	29	63	11	11	121
Total	159	511	1,340	443	58	2,511

Note: Nairobi is not included.

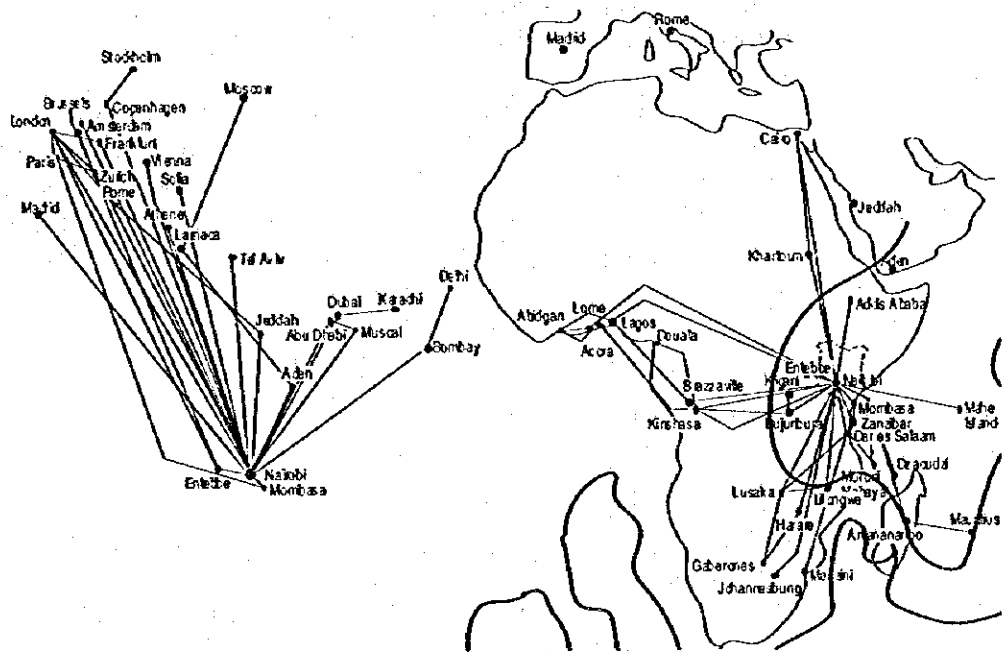
Source: District Plans, 1993

2. Tourism Network and Transportation

2.1. Access to Kenya

Presently, roads, railways, waterways and airways represent transport modes of access to Kenya from foreign countries. The majority of visitors to and from Kenya travel by air. The international airways from Nairobi and Mombasa as the gateway of Kenya are shown in Figure A. 28 (as of April, 1994). The number of flights between Kenya and 14 cities in Europe is 50 per week, between Kenya and 10 cities in Asia is 28 per week and between Kenya and 26 cities in Africa is 105 per week.

Figure A. 28 International Airways from Nairobi and Mombasa



Source: JICA Study Team compiled based on "ABC World Airways Guide".

2.2. Existing Conditions of Transport Modes in Kenya

2.2.1. General

The transport system in Kenya consists of road, rail, air, water and pipeline transport facilities. The transport system occupies an important position in the development of all sectors of the economy in facilitating the integration of the national economy domestically and internationally. Adequate supply of efficient, safe, and affordable transport services is increasingly important to support the increased productivity in all sectors of the economy and sustainable development. The Kenyan Government, therefore, has given considerable attention to the development, expansion and modernisation of these transport facilities. However, further expansion of these infrastructure facilities is constrained by a lack of financial resources. Therefore, the government intends basically to give higher priority to the maintenance, rehabilitation, and modernisation of existing facilities under the policy of cost-effective utilisation of the facilities under the present "Development Plan 1994-1996".

2.2.2. Modal Share

Presently, the majority of tourist transport in Kenya depends on the road transport mode. The use of railways in the tourism sector is

limited due to poor operation services and insufficient coaches. The air services for access to tourism destinations are limited, because of small aircraft services, small airport facilities and expensive air fares.

Table A. 90 shows the share of passengers by mode of travel (excluding air and water). In 1994, the number of passengers transported by road was 90,420,000 persons that is a share of 96.6%. By railway 3,050,000 persons were transported, that is a share of 3.3%. Thus, the modal split share of road and railway transport based on passenger-kilometres was 95.9% and 4.1%, respectively.

Table A. 90 Share of Passengers in Land Transport

Mode	Passengers 1000 persons	%	Passenger-Km millions	%
Road	90,420	96.6	12,980	95.9
Railway*	3,050	3.3	550	4.1
Total	93,470	100.0	13,530	100.0

Note: * Railway Passengers--- including inland waterway
Passenger-km--- excluding inland waterway

Source: A Road Network Development Master Plan Study (Interim Report)

2.2.3. Roads

At present, the road network plays an important role in transporting passengers and goods domestically and internationally. The road network in Kenya consists of classified and unclassified roads. The total length of classified roads, which are administered by the Road Department, Ministry of Public Works and Housing, is about 63,100 km. The length of unclassified roads is 88,500 km in total, thus the total length of the road system is 151,600 km. Classified roads are divided into 6 classes, namely :

- A - international trunk roads,
- B - national trunk roads,
- C - primary roads,
- D - secondary roads,
- E - minor roads, and
- F - special purpose roads.

Table A. 91 and Figure A. 29 show the road length by classes and the trunk road network in Kenya, respectively.

Table A. 91 Road Length by Classes (1992, unit: km)

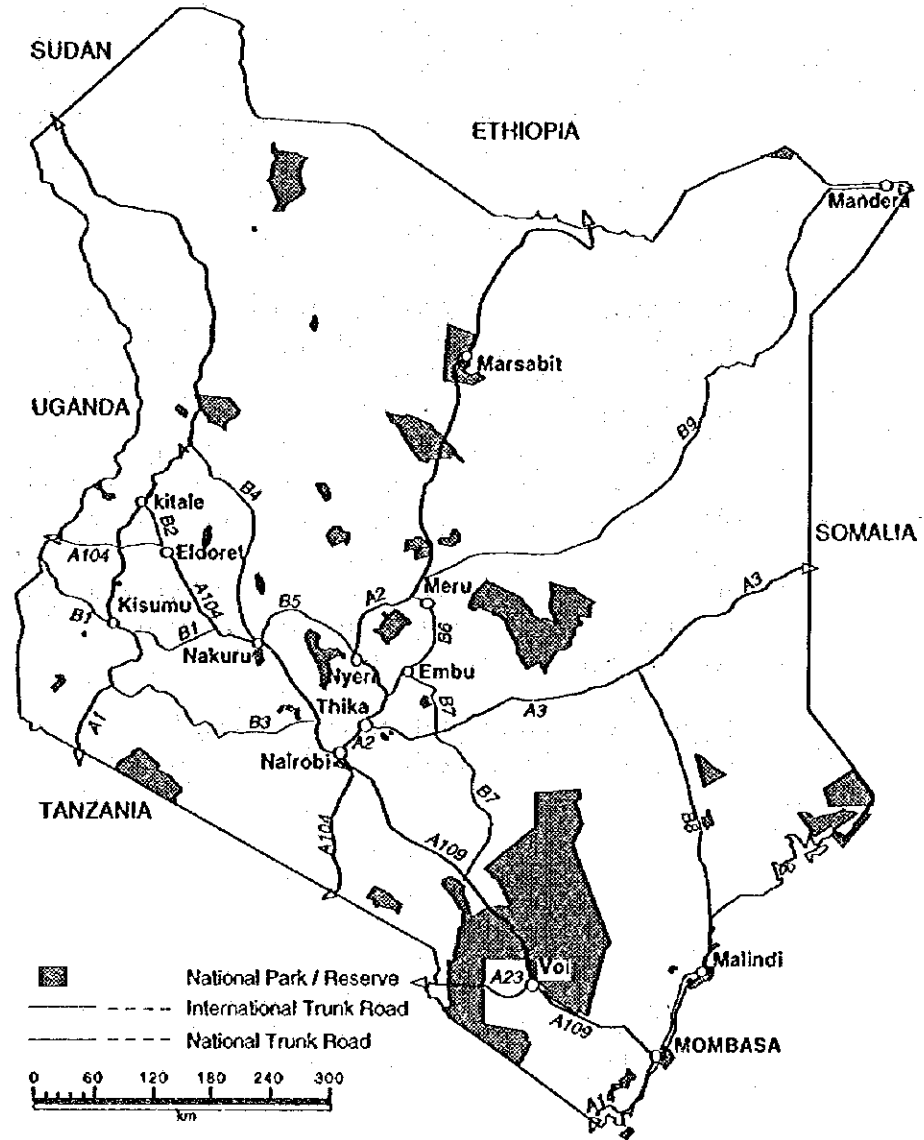
Road Class	Bitumen	Gravel	Earth	Total
A	2,667.1	782.8	241.0	3,690.9
B	1,403.3	820.6	524.2	2,748.1
C	2,502.9	3,292.2	2,160.3	7,955.4
D	1,170.5	6,127.8	3,921.8	11,220.1
E	664.1	6,711.2	19,137.7	26,513.0
F	213.5	8,357.8	2,421.4	10,992.7
Total	8,621.4	26,092.4	28,406.4	63,120.2

Source: Ministry of Public Works and Housing

In 1992, the ratio of paved international trunk roads was 72%, the ratio of paved national trunk roads was 51%, while that of classified roads was 14%. There are, however, many trunk road sections that require pavement construction and rehabilitation. Besides, the traffic volume of some sections on the East-West trunk road between Mombasa, Nairobi and Nakuru is already exceeding the capacity of a 2-lane road. At present, widening works for 4-lane roads are carried out at those sections. Thereafter, the widening of the East-West trunk road will be necessary, due to the increase in traffic volume. The development of rural roads afterwards to be neglected due to a higher priority of trunk road development.

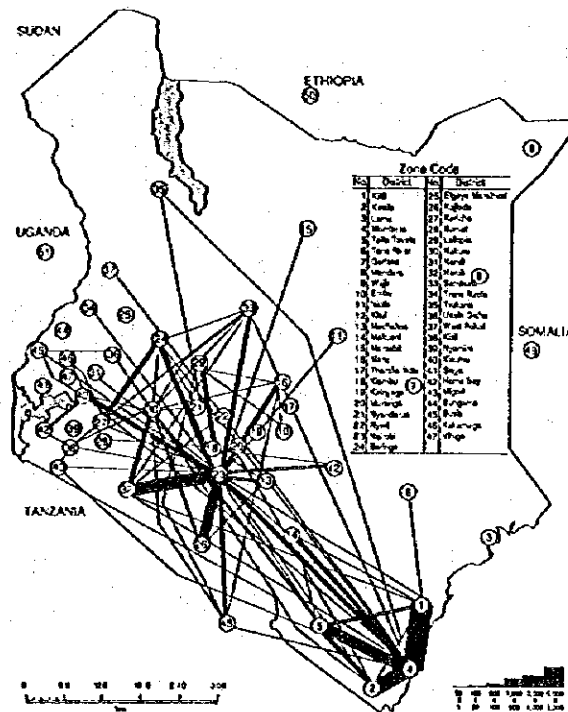
Figure A. 30 shows the desire line chart for passengers with tourism purposes based on an origin-destination survey.

Figure A. 29 Trunk Road Network



Source: Ministry of Public Works and Housing

Figure A. 30 Desire Line Chart of Passengers in Vehicles (Tourism Purpose)



Source: A Road Network Development Master plan Study 1994

According to the results of the vehicle OD survey, the total passenger traffic volume for tourism is about 15,900 persons/day, and it is remarkable that trips with tourism purposes are concentrated on two areas: around Mombasa in the coastal area and connecting Nairobi with other districts. The routes which are highly used by tourists are Mombasa-Kilifi (4,240 persons/day), Mombasa-Kwale (2,430 persons/day), Nairobi-Narok including Masai Mara National Reserve (1,290 persons/day), Nairobi-Kajiado including Amboseli National Park (840 persons/day) and Nairobi-Nyeri including Aberdare National Park (560 persons/day). The tourism passenger volume between Kenya and Tanzania is 355 persons/day (i.e. Nairobi-Tanzania 220, Mombasa-Tanzania 60).

The access conditions to the major tourism destinations by the field survey are shown in Table A. 92.

As a result of the field survey, the road conditions in Central, Western and Masailand Tourism Regions are partly satisfactory, but the road development in Northern Tourism Region are late and the density of the road network is very low. In the Coastal Tourism Region, the

deterioration of paved roads is remarkable. On the whole, access from the trunk roads to the tourism destination entrances is inadequate.

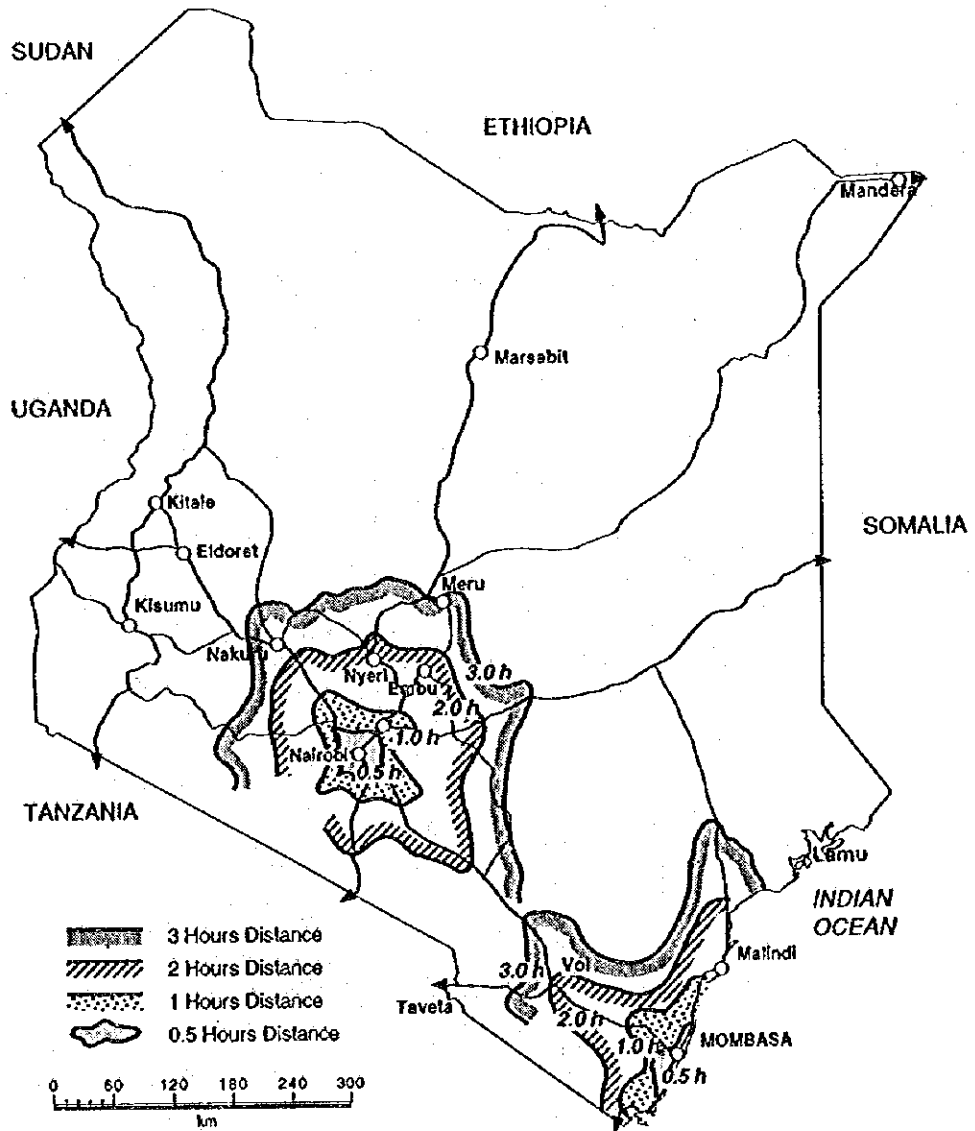
Table A. 92 Access Conditions to Major Tourism Destinations

Origin	Destination	Route	Time	Road Conditions
Nairobi	Mombasa	A104-A109	6.6 hrs	Generally good. In part deterioration of pavement.
	Masai Mara N.R. (Keekorok Lodge)	A104-B3-C12	5.5 hrs	Under construction of widening and pavement on B3. Route C12 is almost unpaved road.
	Naivasha (Lake Naivasha, Hell's Gate N.P.)	A104	1.0 hr	Generally good.
	Amboseli N.P.	A104-C103	3.5 hrs	A104 is generally good. C103 is narrow earth road.
Naivasha	Nakuru (Lake Nakuru N.P.)	A104	1.5 hrs	Generally good. Climbing lane.
Nakuru	Nyahururu (Thompson's Falls)	B5	1.0 hr	Good.
	Kisumu (Lake Victoria)	A104-B1	2.3 hrs	Generally good.
	Kitale (Mt. Elgon)	A104-B2	3.5 hrs	A104 is good. B2 is narrow pavement (bad condition).
Naivasha	Nyeri (Aberdare N.P.)	B5	1.5 hrs	Good. (Bad access to N.P. entrance)
Nyeri	Nanyuki (Mt. Kenya N.P.)	A2	1.5 hrs	Good.
Nanyuki	Nairobi (via Meru, Embu and Thika)	A2-B6-A2	4.0 hrs	Generally good. Climbing lane. Under construction of bypass nearby Thika.
Kitale	Katokol (Lake Turkana)	A1-D348	5.0 hrs	A1 is good. D348 has many ups and downs (bad condition).
Nanyuki	Marsabit N.P./N.R.	A2	7.5 hrs	Isiolo-Marsabit section is unpaved (bad condition).
Mombasa	Malindi Marine N.P.	B8	1.5 hrs	Many sections of deterioration of pavement.
	Diani beach	A14	0.7 hrs	Ferry. Partly narrow pavement surface.

Source: JICA Study Team

Figure A. 31 shows the distribution of existing travel time from Nairobi and Mombasa that are the gateways to Kenya. The figure shows the expansion of travel time along the route A109 (Nairobi-Mombasa trunk road).

Figure A. 31 Travel Time from Nairobi and Mombasa

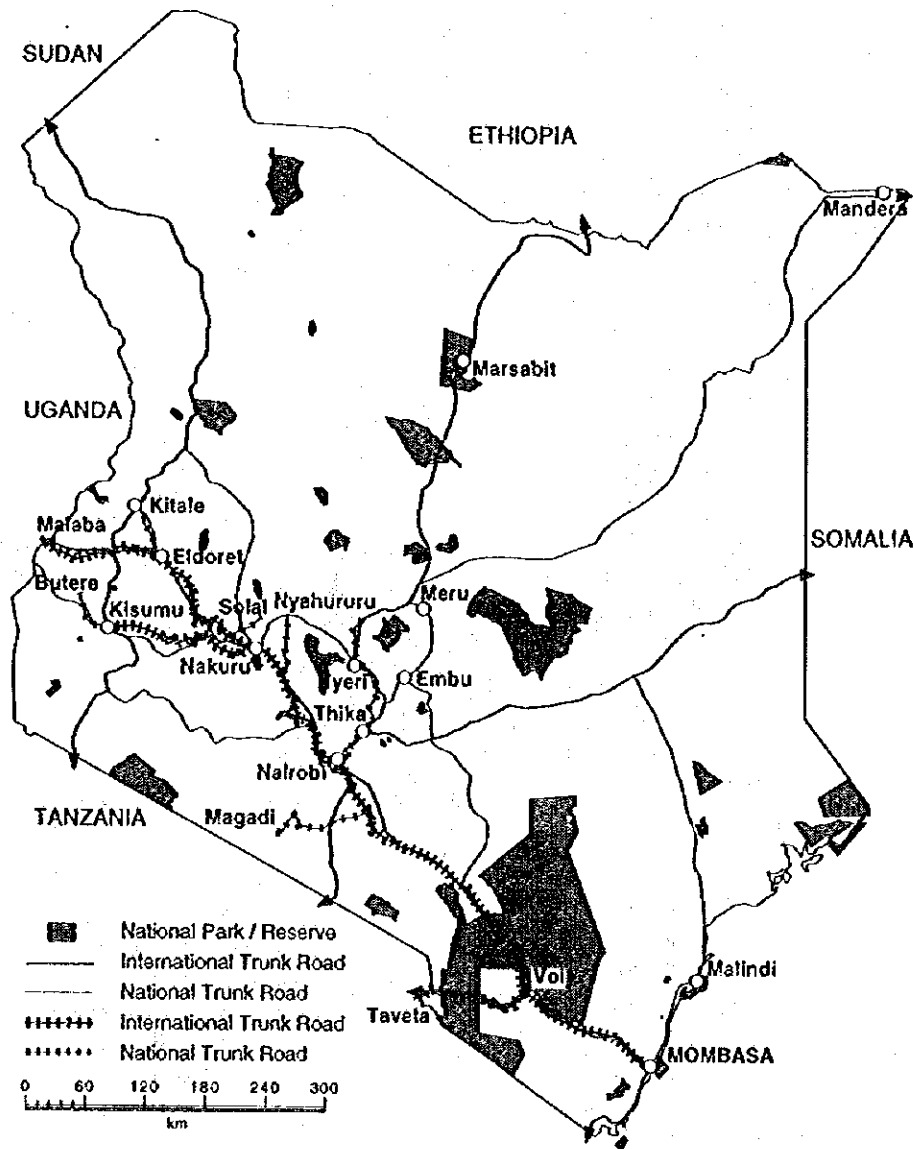


Source: JICA Study Team

2.2.4. Railways

The Kenya Railways started with the construction in 1896 of the "Uganda Railway". At present, the total railway length is 2,740 km, out of which 1,919 kilometres have been managed by the Kenya Railways Corporation(KR). Figure A. 32 shows the railway network in Kenya.

Figure A. 32 Railway Network



Source: JICA Study Team

In recent years, because of the rationalisation of the management, the KR's only effort main objective is to operate the existing facilities; new lines are hardly developed. Moreover, the diesel locomotives, coaching stock vehicles and goods wagons are successively renewed, but their numbers do not fluctuate much. The Corporation owns presently 219 diesel locomotives, 587 coaching vehicles (First Class 46, Second Class 77, Third Class 116, Composite 4, Restaurants & Buffets 23, Others 321) and 6,475 goods wagons (covered goods 3,226, oil tanks 494, others 2,755), respectively.

In the last few years, the Kenyan Railways, although facing stiff competition from road vehicles with good services, played an important role in the country's transport system, especially in the transportation of bulky goods. The system supplements considerably the road transport.

The train operating speed and railway capacity is influenced by an old operating system, meter-gauge tracks and severe gradients, such as the Rift Valley escarpment.

Concerning passenger transport, the KR operates the following long distance routes : Nairobi-Mombasa, Nairobi-Kisumu and Nairobi-Kampala. The passenger services between Nairobi and Kampala resumed on December, 1993. The passenger trains for Nairobi-Mombasa (required time about 13 hours) and Nairobi-Kisumu (about 12 hours) are operated every day, and Nairobi-Kampala (about 21 hours) is operated once a week.

The operations of the KR in passenger and freight transport over the last five years are summarised in Table A. 93.

Table A. 93 Railway Traffic (1988 - 1992)

Items	Unit	1988	1989	1990	1991	1992*
Passenger:						
Journeys	'000	4,037	3,347	3,109	2,635	2,563
Passenger-Km	million	828	732	699	658	557
Revenue	Ksh million	6.99	8.09	10.30	11.73	12.57
Freight:						
Tons	'000	3,255	3,317	3,581	3,286	2,821
Ton-Km	million	1,765	1,910	1,808	1,865	1,627
Revenue	Ksh million	55.69	66.94	81.78	92.11	102.46

* Provisional

Source: Economic Survey 1993

Handled passenger traffic has declined since 1988. This is caused by the suspension of the city commuter train, the decreased demand as tariffs were revised upwards and the increased competition from passenger service vehicles. In addition, freight tonnage handled experienced a decline since 1990. The decline in freight traffic is attributed to reduced economic activity and the increased competition from lorries, trucks and the oil pipeline. Competition in terms of the quality of the services offered played a major role in reducing rail freight traffic.

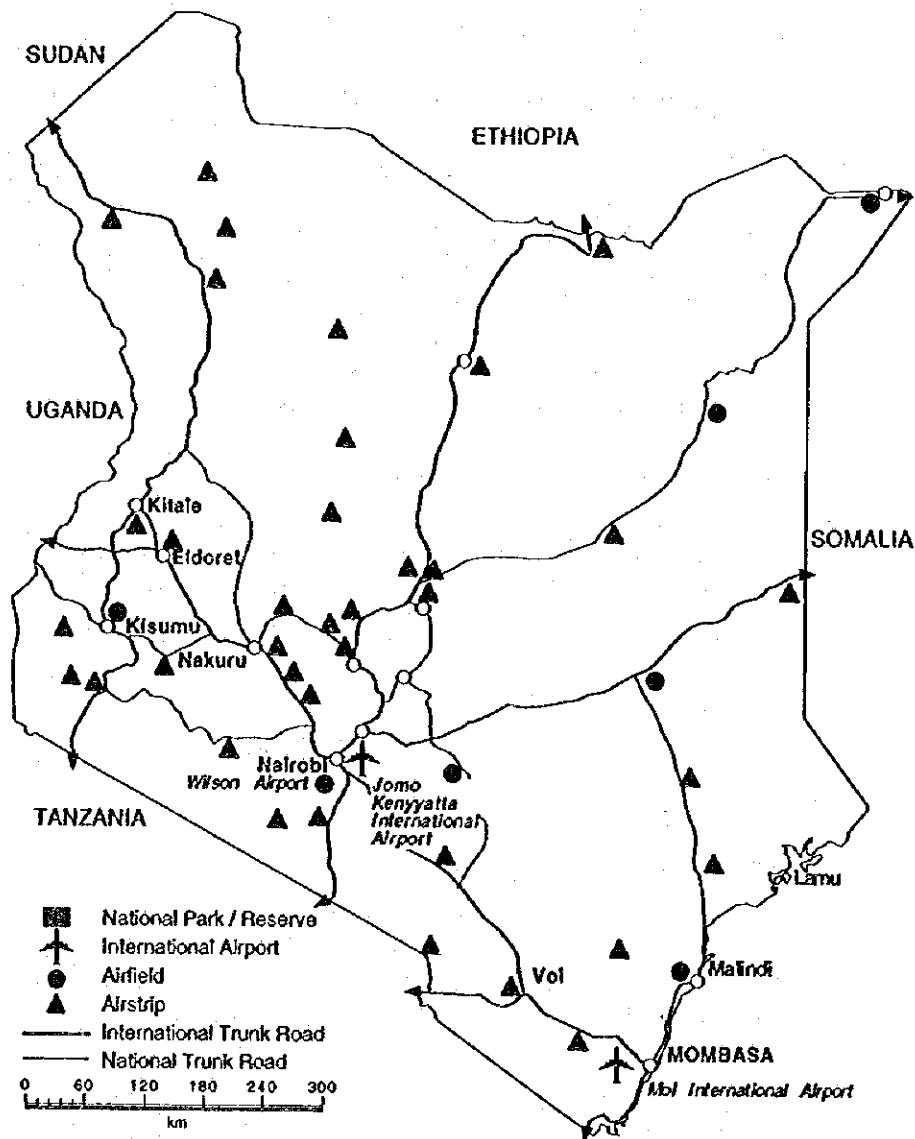
2.2.5. Airports and Airstrips

The role of air transport has significantly increased in terms of the number of passengers and freight handled. Air transport is a fast and reliable mode of transport convenient for travel and trade.

Domestically, it provides access to isolated parts of the country that hitherto would be inaccessible by other modes of transport.

There are 155 airports and airstrips in Kenya. The distribution of main airports and airstrips in Kenya is shown in Figure A. 33.

Figure A. 33 Airports and Airstrips



Source: JICA Study Team

Nairobi is the hub of international air traffic connections and commercial activities attracting an increasing volume of tourist and aviation services. Jomo Kenyatta International Airport links the majority of countries in Africa and Western Europe. Therefore, the government has made considerable efforts in capturing these

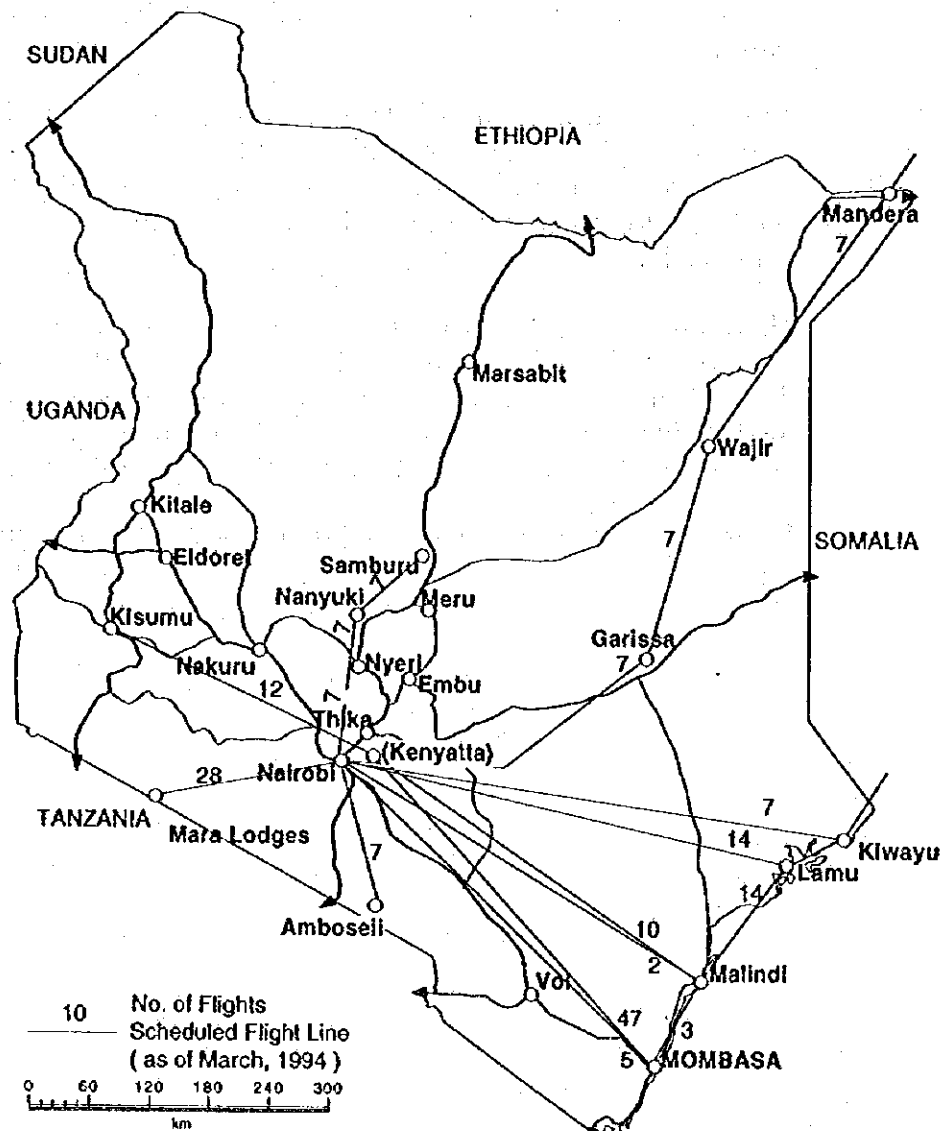
opportunities to foster economic growth by improving the efficiency of the operations of airport, civil aviation facilities and meteorological information services.

The main characteristic of Moi International Airport is that many chartered flights from Europe are operated here. Main user groups are European tour groups on excursions to places on the Kenyan Coast such as Mombasa, Malindi and Lamu, and to Tsavo and Amboseli National Parks.

There are three enterprises (Kenya Airways, Air Kenya Aviation and Equator Airlines), which operate the scheduled flight services domestically. The national carrier, Kenya Airways, with its fleet of modern jet aircraft (3-Airbuses A310-300, 2-Boeings 737) and three Fokker F50, operates both, international and domestic air services.

Figure A. 34 shows the scheduled domestic airways in Kenya.

Figure A. 34 Scheduled Domestic Airways



Source: JICA Study Team

Table A. 94 shows the details of commercial traffic handled at the main airports in Kenya.

The passenger traffic handled at the main airports indicates an increasing trend since 1981. The freight traffic handled at both, Jomo Kenyatta International and Wilson Airport, increased extremely from 1981 to 1992, but decreased at Moi International Airport. According to the direction of external traffic handled at Jomo Kenyatta and Moi International Airports, passengers and freight from Europe account for about 50% and 60-70%, respectively. They are followed by the traffic with African countries south of the equator.

The Kenya Airports Authority (KAA), which is responsible for providing a coordinated system of airports nation-wide to facilitate air transport, administers, controls and manages other relevant facilities necessary for the efficient operation of aircraft.

Table A. 94 Commercial Traffic at Main Airport

	1981	1985	1990	1991	1992	1993
Nairobi						
Movements(number)	19,874	20,420	30,287	28,505	33,013	-
Passengers:(000)						
Arrivals	506	568	795	763	794	-
Departures	508	561	775	753	788	-
Transit	570	537	442	346	299	-
Total	1,584	1,605	2,011	1,863	1,880	-
Freight:(tons)						
Landed	873	11,900	17,234	16,932	18,399	-
Loaded	2,562	31,500	49,149	46,792	52,473	-
Total	3,435	43,400	66,383	63,724	70,872	-
Mombasa						
Movements(number)	11,663	14,228	27,835	29,397	33,821	30,497
Passengers:(000)						
Arrivals	185	205	344	337	336	405
Departures	191	211	394	367	361	420
Transit	16	27	40	47	19	40
Total	392	443	778	852	716	865
Freight:(tons)						
Landed	12,302	9,020	1,046	620	507	462
Loaded	9,883	7,920	1,820	825	795	636
Total	22,184	16,940	2,866	1,443	1,302	1,098
Wilson						
Movements(number)	14,996	15,254	52,111	53,257	62,829	54,399
Passengers:(000)						
Arrivals	25	25	80	87	99	90
Departures	25	25	73	73	88	81
Transit	0	0	0	0	1	1
Total	50	50	153	159	188	171
Freight:(tons)						
Landed	8	24	221	13	13	5
Loaded	11	78	1,627	1,045	2,629	3,328
Total	20	102	1,847	1,058	2,642	3,334

Source: Central Bureau of Statistics

2.2.6. Waterways

The water transport activities in Kenya concentrate at Mombasa on the Indian Ocean seaboard and at Kisumu on Lake Victoria. These ports provide useful services to the country and its hinterland including Uganda, Rwanda, Burundi, Eastern Zaire, Southern Sudan, North-Eastern Tanzania, Somalia and Ethiopia.

Recently, the volume of export and import freight handled at the Mombasa port shows an overall increase. However, the number of handled passengers is small.

3. Water Supply

3.1. National Development Plan

The government of Kenya has adopted "The National Water Master Plan in 1992. The Plan covers the period up to 2010, based on the objectives identified in the 6th National Development Plan. The objectives of the Master Plan are summarised as follows :

- Control water flow level throughout all seasons,
- Expand domestic and industrial water supply,
- Improve sewerage system,
- Improve drainage system,
- Develop agriculture and irrigation,
- Develop livestock water and protect the wildlife,
- Develop hydropower power plants, and
- Implement plan for flood mitigation.

3.2. Existing Conditions of Water Supply

3.2.1. Water Resources

There are two types of water resources : surface water and groundwater. The rivers provide surface water resources mainly in zone 1, 2, 3, 6 and 7. These areas use mainly river water. The other areas use mostly groundwater, such as boreholes, shallow wells, rain harvesting and springs. These data by tourism zone are shown in Table A. 95.

3.2.2. Availability of Water

In urban areas where water demand is high, deficit areas can be found in zone 1, 2, 3, 7 and 8. The deficit areas in zone 1 are Nairobi, Nakuru, Nyahururu, Kiambu and Meru, Narok in zone 2, Busia, Malakesi, Nambale, Kakamega and Rongai in zone 3, Mombasa in zone 7 and Machakos in zone 8. We find a large concentration of deficit areas in places with a big demand for water. However, in places with a smaller demand, water is still available. The availability of water is shown in Table A. 95.

Table A. 95 Availability of Water by Tourism Zone

Zone	Surface water m ³ /d	Ground water m ³ /d	Water demand m ³ /d	Ground water using rate to surface water
1	24,879,240	86,046	650,734	0.4%
2	69,984	12,845	18,722	18.4%
3	11,991,456	374,602	576,561	3.1%
4	0	22,534	10,191	100.0%
5	0	73,429	13,089	100.0%
6	47,151,072	203,509	29,724	0.4%
7	49,248	37,242	126,778	75.6%
8	394,848	151,985	81,515	38.5%

Source: JICA Study Team compiled, based on the National Water Resources Development Master Plan

3.2.3. Water Supply Organisation by Tourism Region

The water supply is managed by the MLRRWD, the NWCPC (National Water Conservation and Pipeline Corporation) and the local government. Major urban centres water supplies are mainly managed by the MLRRWD and the NWCPC, except principal major cities such as Nairobi, Mombasa, Nakuru and Kakamega. Water supply in these major towns is managed by the Municipal Council.

3.2.4. Quality of Water Supply

According to water quality guidelines from MLRRWD, water must be purified to satisfy the following Kenya's water quality standards :

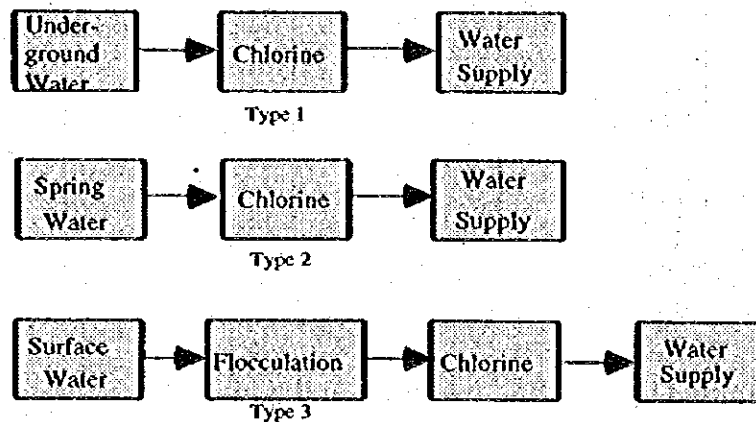
Nitrate	10mg/l
Chloride	250mg/l
Coliform Organism	0/100ml
Faecal Coliforms	0/100ml
Cyanide	0.1mg/l
Mercury	0.001mg/l
Fluoride	1.5mg/l
Hardness	500mg/l
Colour	15 TCU
Turbidity	5 NTU
pH	6.5-8.5
Solids	1000mg/l
Sodium	200mg/l.

However, since treatment facilities have limited capacities compared to water demand, insufficient treatment of raw water has been observed.

3.3. Water Treatment at Tourist Accommodations

According to the tourist facility survey conducted by the study team as well as field investigation, it has been found that many tourist accommodations, which are mostly located in the rural areas, have their own treatment facilities. Their treatment methods can be roughly divided into 3 types as shown in Figure A. 35.

Figure A. 35 Flow Diagram of Water Treatment



Source: JICA Study Team

4. Sewerage and Waste Disposal

4.1. Existing Conditions of Sewerage

4.1.1. Overview

The condition of the sanitary system in Kenya is still unsatisfactory. About half the population doesn't have sanitary facilities. A sewerage system is provided in only 20 urban areas, while in other urban areas, waste water is stored in pits installed at each house and disposed at a dumping site. Even in big cities, the sewerage system covers only limited areas. For example, in Mombasa, the sewerage system provides only the city centre area, which accounts for only 17% of the population, with primary treatment. 24 % of the population use septic tanks and other 59% use pit latrines. Even for the sewerage system, which is available in the city centre areas, overloading of treatment capacity occurs, due to the increase in population.

4.1.2. Current Situation of Sewerage in Tourism Areas

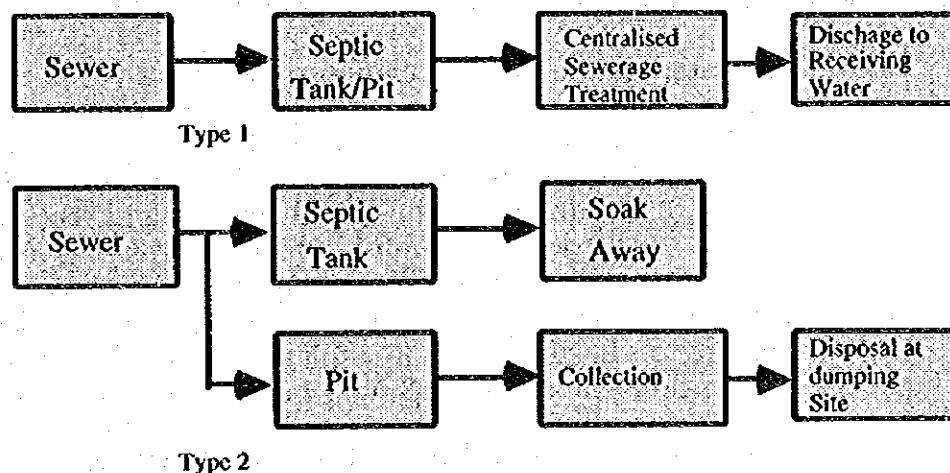
A public sewerage system can not be available in tourism regions except for major towns. Tourist accommodations in other areas have to rely on water treatment by their own facilities. The sewerage system of tourist accommodations is classified into two kinds : either a public or a private treatment system. At tourist accommodations, which are served by a public sewerage system, the sewage is directly discharged into the public sewerage pipeline. Other tourist accommodations have their own sewerage, and the treated water discharge is less than BOD 20 ppm, according to the Kenya Waste Water Effluent Standards. The treatment methods are mainly septic tanks and soaks pits. The treated

water is discharged into soil, rivers and the sea. The main effluent guideline items are as follows :

pH	6.0-9.0
BOD	20mg/l
COD	50mg/l
SS	30mg/l
n-Hexane	30mg/l
Oils	5.0mg/l.

The flow diagram of treatment methods are shown in Figure A. 36.

Figure A. 36 Flow Diagram of Sewage Treatment



Source: JICA Study Team

4.2. Existing Conditions of Waste Disposal

4.2.1. Overview

Waste disposal treatment is gradually becoming a serious problem. The amount of general waste disposal in Nairobi City increased from 300t/d in 1972 to 2,630t in 1985. Industrial waste disposal also increased from 70t/d in 1972 to 620t/d in 1985. The amount of waste discharged per person has increased to 1.7 kg in 1985 from 0.65 kg/d in 1972. The amount of waste disposal in Nairobi City is shown in Table A. 96.

Table A. 96 Volume of Waste Disposal in Nairobi City

Type	1972	1975	1980	1985
General waste disposal	300	560	1,100	2,630
Industrial waste disposal	70	120	200	620
Sand and soil	100	110	160	210
Total	470	790	1460	3460

Source: JICA Study Team

Although waste disposal composition has not yet been studied, it is assumed that domestic waste has recently contained poisonous substances.

4.2.2. Current Situation of Waste Disposal in Tourism Areas

According to the tourist facility survey conducted by the study team, about 80% of tourist accommodations in tourism regions utilise the public service. The tourist accommodations which cannot be served by public service, treat the waste disposal by their own facilities, such as garbage pits, burning, composts and incinerators. The main discharge method is the sanitary landfill which runs at the lowest costs for installation and maintenance. According to the survey, there are only a few hotels which apply sanitary treatment such as incinerators, or composts. Reason given to explain the problem is not sufficient. Treatment methods by tourism region are shown in Table A. 97.

Table A. 97 Waste Treatment Method by Tourism Region

	Public Collection	Private		
		without Intermediate Treatment	Burning	Composting
Central	20	3	2	1
Masailand	16	5	2	1
Western	11	-	2	-
Turukana	-	-	-	-
Northern	-	-	-	-
Tana Basin	-	-	-	-
Coastal	15	3	3	1
Eastern	1	1	-	-

Source: Tourism Facility Survey, JICA Study Team, 1994

5. Power Supply and Communication

5.1. Power Supply

5.1.1. Energy

The Ministry of Energy (MOE) of the Government of Kenya is responsible for Kenya's energy sector, including electric power.

The long-term goal of energy development in the country is to achieve greater self-reliance and intensive energy generation. Currently, the country depends on three sources of energy, namely wood fuel, crude petroleum, and hydroelectric power. Other minor sources of energy include wind, solar, ethanol, geothermal, coal and biogas energies.

Wood fuel provides 70 % of the country's total energy requirements. Petroleum fuels provide over 80 % of all commercial energy used in the country and it is the main source of energy used in the transport, industrial, and agricultural sectors.

5.1.2. Electricity

One of the major objectives of the energy policy of the country is to continue the rapid development of hydro and geothermal potential for electricity generation. As a result, power generation of the country will take an exceptionally important position compared to that of other countries, since a significant portion of the base load supply will be geothermal and hydroelectric power.

(1) Organisation of Power Sector

The Ministry of Energy (MOE) oversees energy policy formulation, electric power, oil and other fossil fuels, wind, biogas, solar, geothermal and wood fuel development.

The Kenya Power and Lighting Company Ltd. (KPLC), which is a 60% government-owned entity, owns and operates all conventional thermal generating facilities, a number of small hydroelectric power stations, and most of the power transmission facilities.

The KPLC imports electricity from Uganda, and distributes power to their customers. KPLC also operates and manages all generating facilities under agreement with other companies and authorities.

(2) Generating Facilities

Generating facilities in Kenya consist of hydroelectric, conventional thermal, and geothermal power plants. The total installed capacity of these facilities as of 1992 in the interconnected power system was 805 MW. Generation of electricity stood at 3,215 GWh in 1992. Large industrial and commercial consumers used nearly half of total electricity used in the country. The composition of generating facilities is summarised in the following Table A. 98.

Table A. 98 Installed Capacity and Generation of Electricity (1972-1992)

	Installed capacity				Generation			
	unit: MW				unit: GWh			
	Hydro	Thermal	Geo	Total	Hydro	Thermal	Geo	Total
1972	--	--	--	--	--	--	--	--
1976	171.4	181.7	--	353.1	583.2	574.7	--	1,157.9
1980	313.5	171.6	--	485.1	1,060.0	430.0	--	1,490.0
1984	353.5	160.2	30.0	543.7	1,491.0	225.0	233.0	1,949.0
1988	323.0	160.2	45.0	528.2	2,332.0	498.0	323.0	3,153.0
1989	497.5	180.1	45.0	722.6	2,469.0	109.0	322.0	2,900.0
1990	497.5	180.1	45.0	722.6	2,537.0	171.0	336.0	3,044.0
1991	603.5	180.1	45.0	828.6	2,780.0	159.0	298.0	3,237.0
1992	603.5	156.1	45.0	804.6	2,796.0	147.0	272.0	3,215.0

Source: National Development Plan for the period 1994 to 1996

At present, the combined hydro, geothermal and thermal generating capacities are capable of meeting the national peak demand for electric power. During drought, however, expensive oil-fired generating facilities have to be used. Existing and committed generation facilities are expected to meet the projected demand until the year 1996 after which additional generation facilities will be required.

Between 1972 and 1992, generation of hydroelectricity increased five-fold, while geothermal and thermal based generation has had a decreasing trend as they are expensive to maintain and generate. Particularly, the Coastal Region is too far away from main hydro and geothermal generation points to receive enough capacity through the power transmission line. Furthermore, gas turbines (30MW) and thermal plants (2 No. of 30MW) have been outage for two years at Kipevu power station, Mombasa. The old distribution lines and shortage of transformers capacity also cause voltage drop and frequent power cut. These are reasons of overload and power cut in the Coastal Region. The above described thermal and gas turbine plants are going to be rehabilitated until August 1994.

(3) Transmission and Distribution Facilities

Most of the power supply system in Kenya is interconnected, but it is operationally divided into 6 regions shown in Figure A. 37. The power transmission system in the country consists of 220kV, 132kV, 66kV, 40kV, and 33kV lines. The distribution systems consist of 11kV on the high voltage and 415/230 kV on low voltage. This system is supervised and controlled from the National Control Centre in Nairobi. The geographic location of the lines and substations are also illustrated in Figure A. 37.

The total installed capacity of the distribution transformers, 33/0.415 kV and 11/0.415/0.23 kV, has reached the level of 1,615 MVA as of June 1993 with an annual average increase rate of 4.4% since 1988. In

June 1993, the total number of consumers has reached 329,081 with an annual average increase rate of 6.9%.

Table A. 99 Total Circuit Length of Transmission and Distribution Lines (km)

	1988	1989	1990	1991	1992	1993
220kV	838	633	657	877	877	877
132kV	1,977	1,977	1,980	1,980	1,980	1,980
66kV	400	408	444	451	451	451
40kV	113	113	113	113	126	126
33kV	3,194	3,268	3,300	3,342	3,451	3,583
11kV	7,252	7,440	7,627	7,870	8,309	8,613
Total	13,568	13,838	14,121	14,633	15,194	15,630

Source: Report and Accounts 1993 of KPLC

Figure A. 37 National Power Grid



Source: KPLC

(4) Rural Electrification Programme

The Rural Electrification Programme (REP) was established in 1973 to ensure electricity supply in the rural areas. In June 1993, the total number of consumers was 329,081 including REP consumers of 34,561. REP unit sales reached 104 GWhr with a growth rate of 23.7%.

5.2. Communication

Since 1977, the postal and telecommunication services including the control of radio communications, have been provided by the Kenya Posts and Telecommunications Corporation (KPTC). The Corporation has previously directed its resources mainly towards the expansion, improvement, modernisation and diversification of its services to meet the ever growing demand in both rural and urban areas.

5.2.1. Postal Services

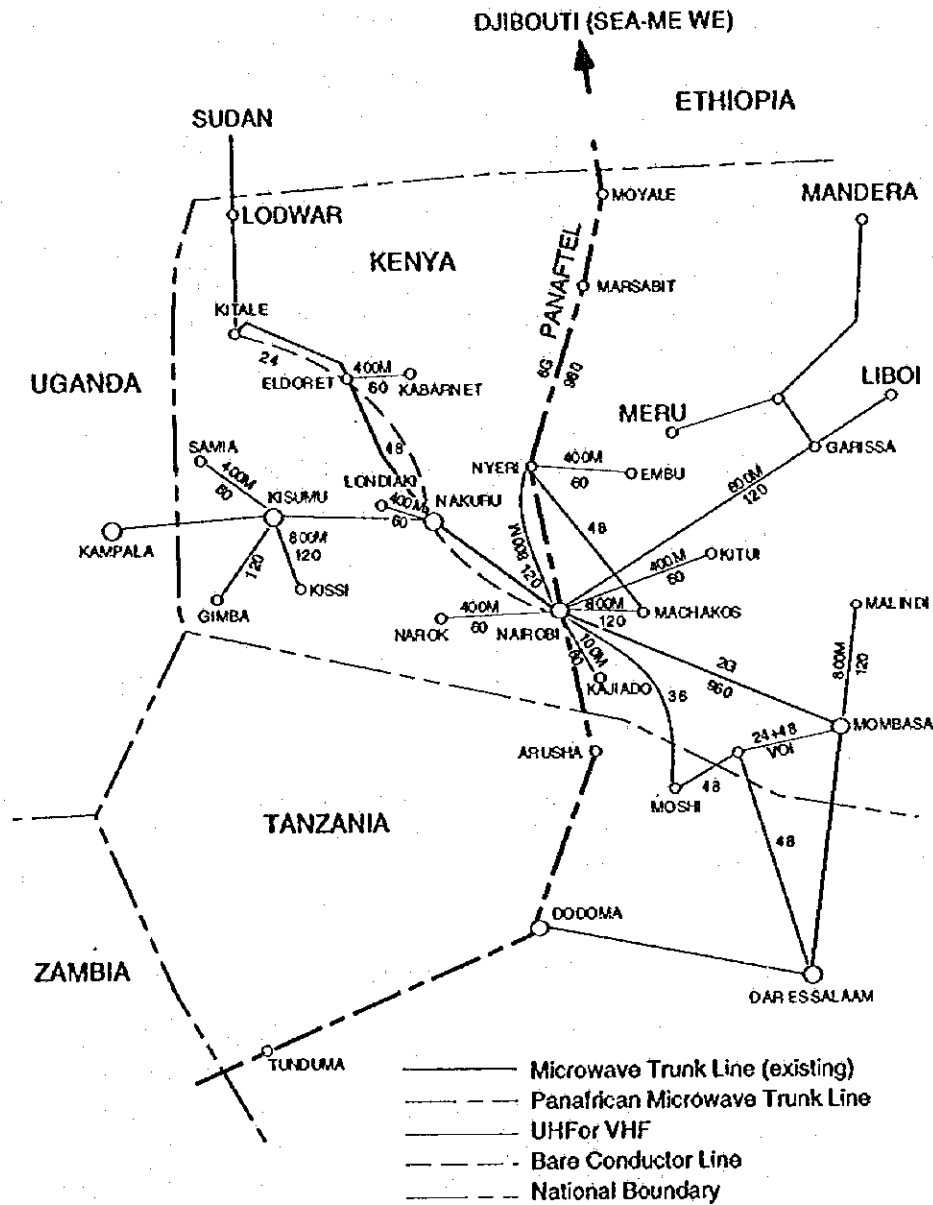
The KPTC provides postal services and intends to increase the number of post offices from 1,025 in 1990 to 1,360 in 1996. This expansion in postal services will reduce the average land area covered per post office. The KPTC also plans to extend the number of destinations for the Expedited Mail Service (EMS) from 55 countries in 1994 to 77 countries by 1996. These improvements will provide easy access for tourists to postal services.

5.2.2. Telecommunications Services

(1) Domestic service

The geographic locations of the telecommunication network is illustrated in Figure A. 38. The major towns are almost covered by national telecommunication network. In rural areas, telephone network systems are mainly provided through radio communication.

Figure A. 38 National Telephone Network



Source: KPTC

The development has been heavily biased towards urban areas. However, the corporation will continue to expand capacities of telephone exchanges in urban areas where excess demand is still significant. The number of people waiting for a telephone line increased to 90,770 in 1991.

Regarding the quality of phone calls, call completion rates for automatic telephone traffic of locally dialled telephone calls became 47.5 % in 1991. Most of the automatic telephone calls sampled failed,

due to busy phone lines in 33.9 % of the cases or to no reply in 7.5 % of the cases. This implies that there is congestion in the local network.

The total number of faults reported from 1st July 1990 to 30th June 1991 was 503,215. The number of main faults on the service line was 259,247, that is 51.5 %.

(2) Tariff for Telecommunications

The KPTC has revised telephone charges on 1 April 1994. Basically, the domestic charges were increased, while the international charges were reduced. International Telephone charges are shown in Table A. 100.

Table A. 100 International Telephone Charges

Destination	US\$/min.
Europe	3.00
North America	3.00
Latin America	3.98
Asia	3.98
Far East	3.98
Africa PTA	2.01
Rest of Africa	3.00

Source: KPTC's tariffs

In case of making an international call from a hotel, the telephone charges become 2 to 3 times as much as the above mentioned, due to high service charges. This is a considerable inconvenience for foreign tourists.

(3) International Telephone System

Table A. 101 shows the number of International Telephone Lines by the Longonot Earth Station and SEA-ME-WE Cable. The Longonot Earth Station maintains two antennas directed towards the Indian and Atlantic Oceans. In Kenya, there has been an increasing demand for international communications at a rapid rate. To meet the increasing demand, the KPTC maintains two terrestrial links to Longonot Earth Station & the Panafel and the SEA-ME-WE Cable. Furthermore, a new Earth Station in Kericho is under construction.

Table A. 101 Number of International Telephone Lines

Countries	Number of Lines	Countries	Number of Lines
Tanzania	224	Austria	7
Uganda	165	South Korea	5
United Kingdom	164	Hong Kong	5
United States	56	Burundi	5
Germany	26	Zimbabwe	5
Italy	22	Senegal	4
France	20	Ivory Coast	4
Canada	19	Singapore	4
Netherland	19	Bangladesh	3
India	17	Pakistan	3
Japan	15	Bahrain	3
Saudi Arabia	14	Cameroon	2
South Africa	14	Somalia	2
Switzerland	14	Egypt	2
Spain	11	South Yemen	2
Ethiopia	10	Ghana	2
Zambia	10	Kuwait	2
Australia	10	Angola	2
Rwanda	9	Djibouti	2
Malawi	9	Seychelles	2
Belgium	9	Mauritius	2
Scandinavia	9	Algeria	1
Greece	8	Philippines	1
Israel	8	Sri Lanka	1
Subtotal	882	Subtotal	71
		Total	953

Source : KPTC

5.3. Salient Features of Power Supply and Telecommunication by Tourism Region

Table A. 102 shows the particular tendencies for each tourism region.

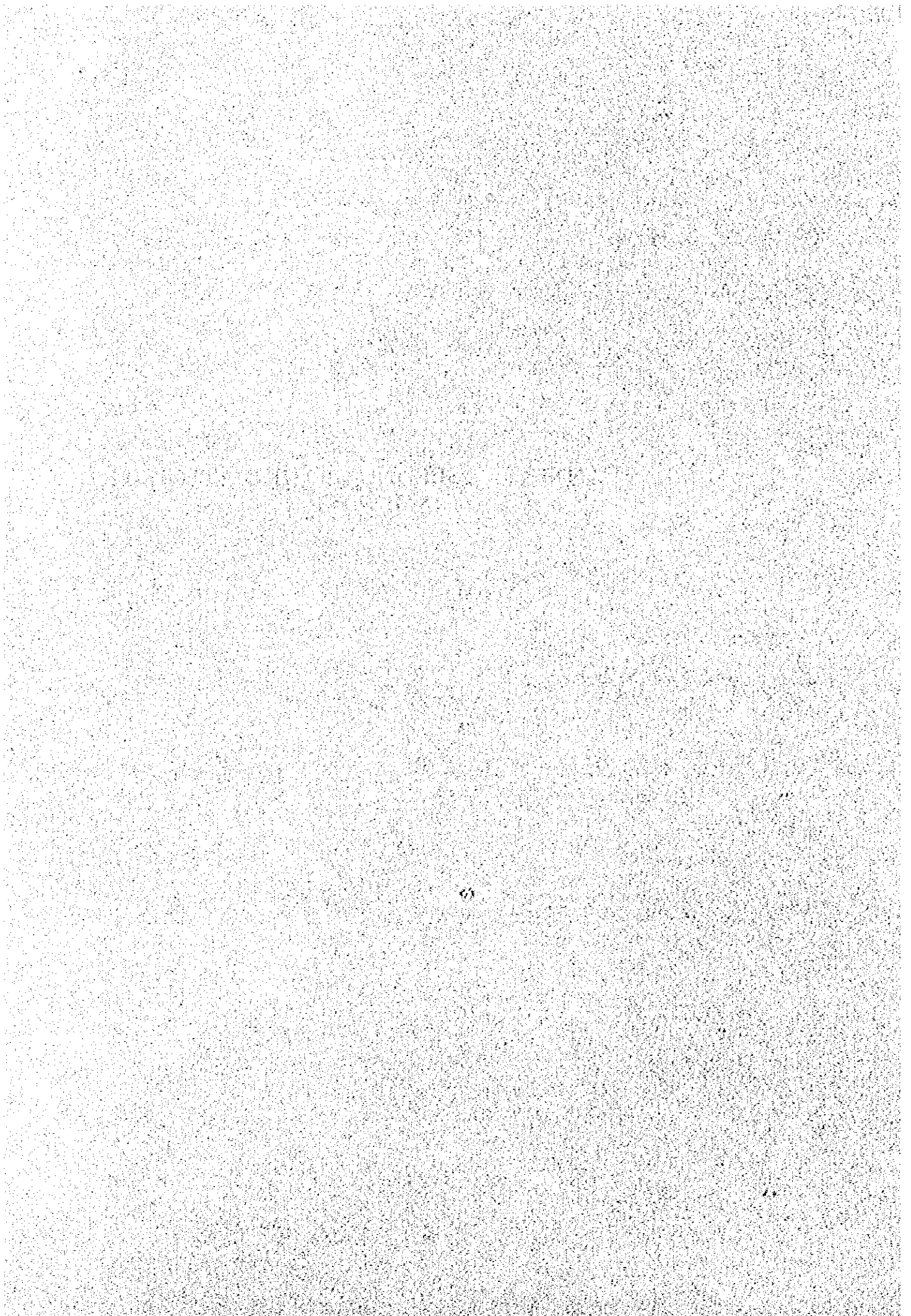
Table A. 102 Tendency of Electricity and Telecommunications

Tourism Region	Electricity		Telecommunication	
	Power supply	Connected to Grid	Connection in Normal area	Connection in National Park
1) North	Available in isolated areas	Isolated	Limited in city area	Expanded by radio
2) Coastal	Available, but no good reliability	Connected	Available	Cable connection
3) Central & West	Available	Connected	Available	Cable connection
4) Masai Land	Available, but limited	Isolated	Available, by radio	Expanded by radio

Source: JICA Study Team

In national parks and reserves, telecommunication lines will be provided by UHF or VHF radio by KPTC. Electricity in national parks and reserves will be supplied mainly by diesel generators.

**ANNEX 8 SETTING OF THE DEVELOPMENT
FRAMEWORK**



Annex 8 Setting of the Development Framework

1. Future Socio-economic Framework

The Ministry of Planning and National Development has projected a long-term socio-economic framework in the "Sessional Paper on Recovery and Sustainable Development." The projected future population and urbanisation framework is shown in Table A. 1.

"A Road Network Development Plan Study in the Republic of Kenya" conducted by JICA has estimated the future provincial population framework, which was based on the above mentioned national population framework and the regional development policy set by the Kenyan Government. The District population and urban population of each District were estimated in the study. In order to maintain consistency, the same population framework as in the Road Network Development Study has been adopted for the National Tourism Master Plan.

The estimated District population is shown in Table A. 104 and Table A. 105. These data provide a basis for infrastructure development plans for the national tourism master plan.

Table A.103 Estimated Future Population by Tourism Region

Tourism Region	Population			
	1994	2000	2005	2010
Nairobi	1,805,695	2,455,826	3,116,658	3,855,307
Urbanization Ratio	100.0%	100.0%	100.0%	100.0%
Central	7,832,342	9,004,247	9,969,713	10,904,917
Urbanization Ratio	15.9%	20.2%	23.8%	27.9%
Masailand	852,893	1,083,560	1,291,421	1,509,006
Urbanization Ratio	8.8%	10.8%	12.0%	13.1%
Western	10,620,527	12,204,413	13,515,590	14,597,406
Urbanization Ratio	10.0%	12.2%	14.2%	9.7%
Turkana	269,631	232,356	250,030	266,196
Urbanization Ratio	0.0%	0.0%	0.0%	0.0%
Northern	407,714	431,609	450,651	468,607
Urbanization Ratio	16.4%	18.5%	20.2%	21.9%
Tana Basin	279,803	302,174	312,994	320,875
Urbanization Ratio	18.6%	22.9%	27.5%	32.4%
Coastal	1,739,048	1,975,805	2,188,152	2,398,547
Urbanization Ratio	38.6%	41.2%	48.6%	56.7%
Eastern	1,753,340	2,011,009	2,209,791	2,397,140
Urbanization Ratio	3.8%	4.9%	5.9%	7.0%
Total	25,500,993	29,760,999	33,305,000	36,718,001
Urbanization Ratio	19.8%	23.4%	26.8%	30.6%

Source: JICA Study Team

Table A. 104 Forecasted Future Population (1994 - 2010)

Tourism Region	Province	District	Population				
			by Dist. '94	by Dist. '00	by Dist. '05	by Dist. '10	
	Nairobi	Nairobi	1,805,695	2,455,826	3,116,658	3,855,307	
	Central	Kiambu	1,058,527	1,194,297	1,303,588	1,407,388	
		Kirinyaga	454,549	514,409	562,751	608,798	
		Muranga	990,840	1,115,064	1,214,789	1,309,268	
		Nyandarua	415,913	488,865	550,186	610,773	
		Nyeri	685,972	754,574	808,327	858,137	
	Eastern	Embu	438,599	507,113	563,701	618,651	
		Thakara Nithi	327,254	380,484	424,706	467,878	
		Isiolo	87,413	106,639	123,435	140,604	
		Machakos	899,135	1,022,332	1,122,310	1,217,843	
		Meru	1,019,067	1,164,323	1,282,804	1,396,547	
	Rift Valley	Laikipia	272,076	330,031	379,695	429,329	
		Nakuru	1,054,533	1,278,457	1,470,235	1,661,794	
		Samburu	128,464	147,659	163,186	177,907	
1 Central Tourism Region			9,638,037	11,460,073	13,086,371	14,760,224	
	Rift Valley	Kajiado	329,221	409,308	480,168	552,529	
		Narok	523,672	674,052	811,253	956,477	
2 Masailand Tourism Region			852,893	1,083,560	1,291,421	1,509,006	
	Nyanza	Kisii	883,899	999,785	1,093,459	1,182,789	
		Nyamira	423,837	466,277	499,588	530,511	
		Kisumu	778,393	889,819	980,903	1,068,656	
		Stara	743,481	842,816	923,299	1,000,213	
		Homa Bay	678,805	751,520	808,977	882,644	
		Migori	546,665	620,895	681,159	738,859	
	Rift Valley	Baringo	440,042	543,628	634,135	726,209	
		E. Marakwet	257,739	299,034	332,778	365,066	
		Kericho	631,972	758,892	866,493	972,976	
		Bomet	436,857	479,301	511,949	541,510	
		Nandi	516,172	593,794	666,299	730,881	
		Trans-Nzoia	476,549	562,511	634,063	703,694	
		Uasin Gishu	546,931	655,081	746,517	836,776	
		West Pokot	266,355	306,584	339,178	370,122	
	Western	Bungoma	795,020	907,622	999,375	1,087,374	
		Busta	470,303	537,051	591,454	643,644	
Kakamega		1,186,902	1,381,542	1,543,415	1,701,590		
Vihiga		540,605	608,261	662,549	713,890		
3 Western Tourism Region			10,620,527	12,204,413	13,515,590	14,597,406	
	Rift Valley	Turukana	209,631	232,356	250,030	266,196	
4 Turukana Tourism Region			209,631	232,356	250,030	266,196	
	Eastern	Marsabit	150,556	170,986	187,545	203,350	
		Mandera	134,607	140,909	144,967	148,218	
		Wajir	122,551	119,714	118,139	117,039	
5 Northern Tourism Region			407,714	431,609	450,651	468,607	
	Coast	Tana River	151,600	174,177	185,117	193,086	
	North Eastern	Garissa	128,203	127,997	127,877	127,789	
6 Tana River Tourism Region			279,803	302,174	312,994	320,875	
	Coast	Krifi	695,578	795,439	842,451	875,938	
		Kwale	444,546	501,795	526,328	542,472	
		Lamu	66,160	74,987	78,893	81,538	
		Mombasa	532,764	603,584	740,480	898,599	
7 Coastal Tourism Region			1,739,048	1,975,805	2,188,152	2,398,547	
	Coast	Taita	245,628	283,353	302,063	315,936	
		Eastern	Kitui	773,137	893,704	993,260	1,089,912
			Makueni	734,575	833,952	914,468	991,292
8 Eastern Tourism Region			1,753,340	2,011,009	2,209,791	2,397,140	
National Total			25,500,993	29,700,999	33,305,000	36,718,001	

Source: JICA Study Team

Table A. 105 Forecasted Future Population (Urban)

Tourism Region	Province	District	Population			
			by Dist. '94	by Dist. '00	by Dist. '05	by Dist. '10
	Nairobi	Nairobi	1,805,695	2,455,826	3,116,657	3,855,307
	Central	Kiambu	159,433	263,487	361,743	481,750
		Kirinyaga	28,057	46,579	64,164	85,711
		Muranga	93,265	153,547	210,207	279,222
		Nyandarua	15,318	26,906	38,655	53,643
		Nyeri	152,890	243,327	324,805	421,656
	Eastern	Embu	24,742	30,276	39,900	51,423
		Thakara Nithi	6,623	8,642	11,967	16,153
		Isiolo	32,568	43,918	55,222	67,806
		Machakos	186,428	229,553	304,295	394,619
	Rift Valley	Meru	104,644	126,390	164,947	210,678
		Lakipia	56,915	80,674	98,204	117,118
		Nakuru	350,993	515,917	646,082	791,420
		Samburu	32,591	45,939	55,759	66,393
1 Central Tourism Region			3,050,162	4,270,981	5,492,607	6,892,929
	Rift Valley	Kajiado	49,726	78,837	104,369	134,398
		Narok	24,919	38,617	50,344	64,013
2 Masailand Tourism Region			74,645	117,454	154,713	198,411
	Nyanza	Kisii	62,162	82,582	115,146	156,335
		Nyamira	12,386	15,222	17,862	20,567
		Kisumu	267,688	343,096	464,990	614,412
		Siaya	30,914	41,205	51,458	62,784
		Homa Bay	38,842	49,983	68,054	90,427
		Migori	21,593	28,863	36,122	44,158
	Rift Valley	Baringo	22,803	32,977	40,785	49,298
		E. Marakwet	7,449	10,647	13,057	15,692
		Kericho	63,101	88,459	106,785	126,374
		Bomet	6,751	8,881	10,242	11,649
		Nandi	30,073	42,974	52,692	63,316
		Trans-Nzoia	76,355	111,968	139,933	171,063
		Uasin Gishu	169,190	253,553	322,008	399,381
		West Pokot	16,815	23,751	28,873	34,428
	Western	Bungoma	95,246	136,495	167,656	201,650
		Busia	20,753	30,917	39,125	48,385
		Kakamega	110,388	169,202	218,712	275,728
		Vihiga	10,877	15,851	19,732	24,043
3 Western Tourism Region			1,063,386	1,486,626	1,913,232	2,409,690
	Rift Valley	Turkana	0	0	0	0
4 Turkana Tourism Region			0	0	0	0
	Eastern	Marsabit	33,060	39,669	45,622	51,566
		Mandera	8,736	10,917	12,859	14,820
		Wajir	25,083	29,061	32,659	36,274
5 Northern Tourism Region			66,879	79,647	91,140	102,660
	Coast	Tana River	18,280	29,079	40,281	52,671
	North Eastern	Garissa	33,831	40,141	45,748	51,342
6 Tana River Tourism Region			52,111	69,220	86,029	104,013
	Coast	Kenji	97,230	153,602	237,150	345,917
		Kawale	22,527	34,097	49,927	69,200
		Lamu	18,893	23,067	36,881	45,906
		Mombasa	532,764	603,581	740,480	898,599
7 Coastal Tourism Region			671,414	814,350	1,064,438	1,359,622
	Coast	Taita	40,448	64,733	90,073	118,260
	Eastern	Kitui	19,705	25,492	31,063	37,052
		Makueni	6,249	7,495	9,730	12,369
8 Eastern Tourism Region			66,402	97,720	130,866	167,681
National Total			5,014,999	6,935,998	8,933,025	11,215,006

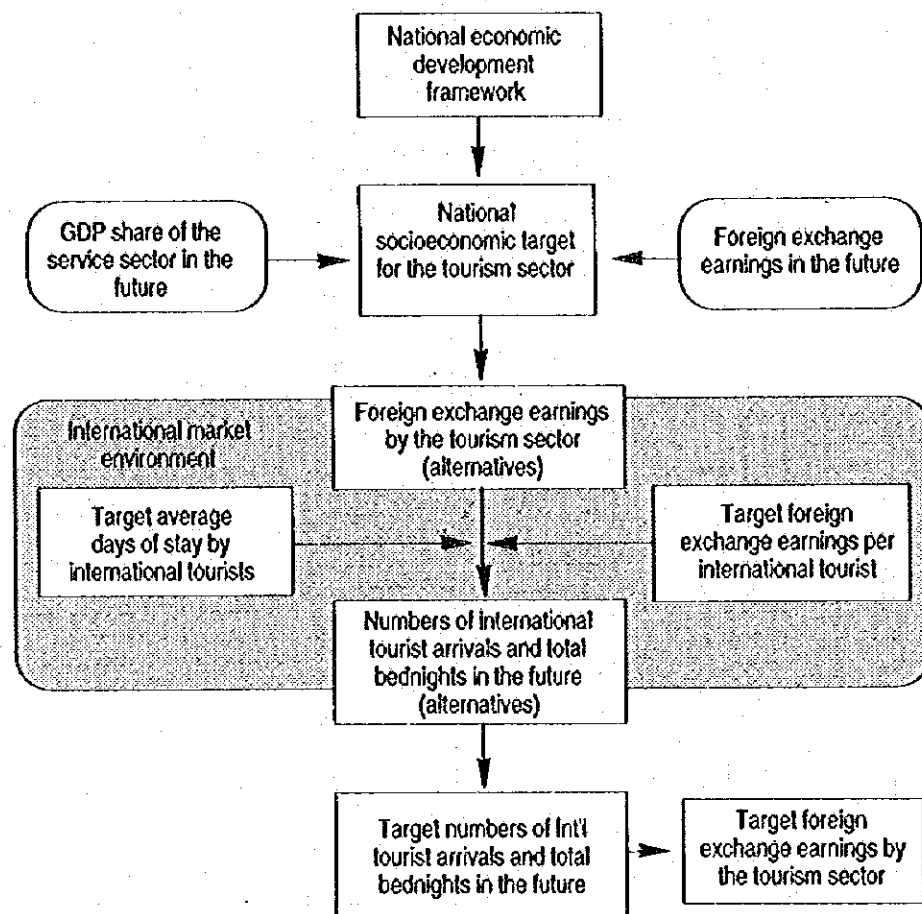
Source: JICA Study Team

2. Target Numbers of International Arrivals

2.1. Methodology

The methodological flow chart for setting targets for future international tourist arrivals is depicted in Figure A. 39. National socio-economic targets by the tourism sector, targetted average days of stay, and target foreign exchange earnings per tourist were assumed in advance to calculate the target international tourists arrivals. In other words, the target international arrivals are the number of people that should be encouraged to visit Kenya in order to achieve the national socio-economic target.

Figure A. 39 Flow Chart of International Tourists Arrival Target Setting



Source: JICA Study Team

2.2. Target Foreign Exchange Earnings by the Tourism Sector

The tourism sector generated 1,083.5 million Kenyan £ in 1993 (net nominal price, equals to 310,2 million Kenyan £ in the 1982 constant price), which accounted for 16 % of the total current credit account. It was the second foreign exchange earner after the merchandise trade. Net foreign exchange earnings are used as the index to set growth targets for the tourism trade. Table A. 106 and Table A. 107 show past performance of the tourism sector and the national development targets, based on the sessional paper, No. 1 of 1994 respectively.

Table A. 106 Past Performance of the Tourism Sector

Year	GDP(constant price) Tourist Arrivals				Foreign Exchange Earnings			Earnings per tourist		Deflator (trade, rest. and hotels)
	GDP (Service)	Growth Rate	(000)	%	(Travel/net) current P	Growth constant P	Rate	K£	%	
1987	1,323.9	5.3%	580.2		272.1	178.6	12.6%	307.9		152.3
1988	1,395.3	5.4%	592.9	2.2%	328.9	201.5	12.8%	339.9	10.4%	163.2
1989	1,472.9	5.6%	695.9	17.4%	404.5	222.2	10.3%	319.4	-6.1%	182
1990	1,539.9	4.5%	769.3	10.5%	489.4	240.6	8.3%	312.8	-2.1%	203.4
1991	1,588.0	3.1%	750.9	-2.4%	560.7	233.5	-2.9%	311.0	-0.6%	240.1
1992	1,625.5	2.4%	716.0	-4.6%	666.7	210.4	-9.9%	293.9	-5.5%	316.8
1993	1,652.5	1.7%	777.4	8.6%	1083.5	270.5	28.6%	348.0	18.4%	400.5
Growth	3.8%		5.0%				7.2%		2.1%	

Note: GDP and FEE in million K£
Source: Economic Survey 1994 and Statistical Abstract 1991

Table A. 107 National Economic Development Target

Year	1993	2000	2005	2010
Total GDP	4,337.6	6,202.2	8,252.9	10,766.2
(Growth Rate)	-	5.2%	5.9%	5.5%
Service Sector GDP	1,652.5	2,494.8	3,479.2	4,739.8
(Growth Rate)	-	6.1%	6.9%	6.4%
% share to GDP	38.1%	40.2%	42.2%	44.0%

Note: GDP in million K£
Source: Ministry of Planning and National Development

Target foreign exchange earnings by the tourism sector are determined in order to calculate the target numbers of international tourist arrivals. Two alternative cases for foreign exchange earnings were examined :

- Foreign exchange earnings by the tourism sector will grow at the same pace as the growth rate of the service sector (Case-1),

- The share of foreign exchange earnings by the tourism sector in GDP will grow at the same trend as in the past. In other words, the significance of the tourism sector will increase in terms of foreign exchange earnings (Case-2).

(1) Case-1

Table A. 6 shows the results of the Cases-1 calculation of foreign exchange earnings.

Table A. 108 Targeted Foreign Exchange Earnings (Case-1)

Year	Unit: million K£			
	1993	2000	2005	2010
Total GDP	4,337.6	6,202.2	8,252.9	10,766.2
(Growth Rate)		5.2%	5.9%	5.5%
Service Sector GDP	1,652.5	2,494.8	3,479.2	4,739.8
(Growth Rate)		6.1%	6.9%	6.4%
% share to GDP	38.1%	40.2%	42.2%	44.0%
Foreign Exchange Earnings by the Tourism Sector	270.5	408.4	569.6	776.0
(Growth Rate)		6.1%	6.9%	6.4%

Note: Foreign Exchange Earnings in 1993 K£ 1083.5 million (Net)
 Constant price 1982 is estimated by using Trade Restaurant and Hotel price deflator
 Estimated Foreign Exchange Earnings in 1982 constant price is Mil. K£ 270.5

Source: JICA Study Team, Economic Survey

(2) Case-2

Table A. 109 and Table A. 110 show both, the calculation process and the calculated foreign exchange earnings for Case-2.

Table A. 109 Regression Result of GDP FEE Correlation (Case-2)

Input Data

	Year	GDP-Service	F.E.E. Net	Dummy
1	1985	1177.8	130.9	0
2	1986	1256.7	158.7	0
3	1987	1323.9	178.6	0
4	1988	1395.3	201.5	0
5	1989	1472.9	222.2	0
6	1990	1539.9	240.6	0
7	1991	1588.0	233.5	1
8	1992	1625.5	210.4	1
9	1993	1652.5	270.5	0

Regression Data

Variable name	Coefficient	Std. Err. estimate	t statistics	Prob > t
Constant	-203.789	35.160	-5.796	0.001
GDP-Service	0.288	0.025	11.565	0.000
Dummy	-37.275	9.576	-3.892	0.006

Source	Sum of squares	Deg. of freedom	Mean squares	F ratio	Prb > F
Model	14423.480	2	7211.74	70.394	0
Error	614.689	6	102.448		
Total	15038.169	8			

Formula

Estimated Foreign Exchange Earnings = 0.288 x Service Sector GDP - 203.789

Source: JICA Study Team

Table A. 110 Targeted Foreign Exchange Earnings (Case-2)

Unit : million KSh

Year	GDP	Calculated FEE	Rounded FEE*
1993	1,653	272	270
2000	2,495	515	510
2005	3,479	798	800
2010	4,740	1,161	1,160

Note: Rounded figures are used for the setting of tourist arrivals.

Source: JICA Study Team

2.3. Foreign Exchange Earnings per International Tourist per Day

Based on the information in "Economic Survey 1994," 348 Kenyan pounds of foreign exchange earnings per international tourist was obtained in 1993 (1982 constant price base). Foreign exchange earnings per international tourist in constant 1982 prices has increased by 2.2 percent between 1987 and 1993.

Although MOTW intends to increase per-tourist expenditure, its pace will be slow as it assumes improvement of various aspects of Kenyan tourism, such as service level, tourist image, security and hygiene conditions. Fierce market competition among beach and safari destinations would also adversely affect the up-market shift. Taking this situation into account, the target foreign exchange earnings per international tourist were assumed to grow at the same growth rate of 2.1 % annually as in the past.

Table A. 111 Target Foreign Exchange Earnings per Person

Unit : K£				
Year	1993	2000	2005	2010
Target FEE/person(K£)	348.0	402.4	446.5	495.4

Note : 1982 constant price

Source: JICA Study Team

2.4. Target Average Days of Stay

The main element considered for setting the target of average days of stay is tourist characteristics by origin region, that is (1) length of holiday taking, (2) types of tourism that should be promoted, and (3) types of tourism products that will be developed in the future. The following assumptions were made to set the target :

- European countries will continue to be the main source from the international market, even if market diversification is achieved,
- Newly targeted countries in East Asia and South Asia are expected to increase the length of stay, though it will not reach the level of Europe. As there are many beach destinations in their vicinity, beach resort tourism would not be expected from the regions to Kenya, and
- Development of wildlife tourism in the East African countries could shorten the length of stay in Kenya, if she continues to depend on the current type of wildlife tourism. Diversification of tourism products, however, could offset the unfavourable trend.

The target average days of stay were defined as shown in Table A. 112. Table A. 113 shows the target numbers of bednights per tourist, which was obtained by subtracting one day from the days of stay.

Table A. 112 Average Days of Stay by Tourist Origin

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

Source: "Airport Questionnaire Survey," JICA Study Team

Table A. 113 Target Bednights per Tourist by Origin

	1993		2000		2005		2010	
	Bednights	Growth	Bednights	Growth	Bednights	Growth	Bednights	Growth
Europe	18.2	-0.2%	18.0	0.0%	18.0	0.0%	18.0	-0.1%
America	14.4	0.0%	14.4	0.1%	14.5	0.0%	14.5	0.0%
Africa	3.1	3.5%	4.0	6.6%	5.5	3.4%	6.5	4.4%
Asia	7.6	0.7%	8.0	2.4%	9.0	3.1%	10.5	1.9%
Oceanic	10.7	0.4%	11.0	0.0%	11.0	0.0%	11.0	0.2%
Average	12.9	0.0%	12.9	0.4%	13.1	0.3%	13.4	0.2%

Source: "Airport Questionnaire Survey," JICA Study Team

2.5. Setting of Target for International Tourists Arrivals

The number of international tourists were calculated based on the two cases of foreign exchange earnings, targeted days of stay and targeted per tourist per day foreign exchange earnings. The results of case-1 and case-2 are shown in Table A. 114 and Table A. 115, respectively.

Table A. 114 International Tourist Arrivals (Case-1)

Year	1993	2000	2005	2010
Target F/E Earnings (million K£)	270.5	408.4	569.6	776.0
Annual growth rate		6.1%	6.9%	6.4%
Holiday/business	777,400			
Incl. transit	824,200			
Target FEE/person(K£)	348.0	402.4	446.5	495.4
Calculated number of tourist arrivals		1,014,805	1,275,670	1,566,395

Source: JICA Study Team

Table A.115 International Tourists Arrivals (Case-2)

Year	1993	2000	2005	2010
Target F/E earnings (input data)	270.5	510.0	800.0	1160.0
Annual growth rate		9.5%	9.4%	7.7%
Holiday/business	777,400			
Incl. transit	824,200			
Target FEE/person(K£)	348.0	402.4	446.5	495.4
Calculated number of tourist arrivals		1,267,264	1,791,671	2,341,519

Source: JICA Study Team

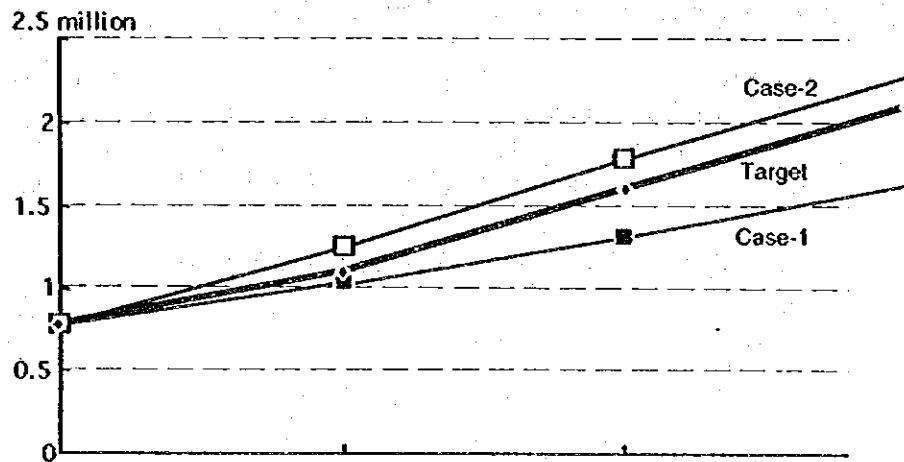
The target number of international tourist arrivals were set between the two cases. The target number in 2000 was set slightly lower than the mean of the two cases in order to make the growth curve consistent with the past trend. The target number in 2010 was set slightly higher than that of the cases as capacity expansion by the planned infrastructure development should accelerate tourist arrivals after the year 2000. Table A.116 and Figure A. 40 show the target numbers of international tourist arrivals employed in this Master Plan.

Table A. 116 Target Number of International Tourists Arrivals

Unit : '000' tourists				
Year	1993	2000	2005	2010
Case-1	777.4	1,035.9	1,321.5	1,646.7
Case-2	777.4	1,267.3	1,791.7	2,341.5
Target (planning figure)	777.4	1,100.0	1,600.0	2,100.0

Source: JICA Study Team

Figure A. 40 Target Number of International Tourists Arrivals



Source: JICA Study Team

3. Target Numbers of Bed-Nights

3.1. Target Numbers of International Tourist Bed-nights

Table A. 117 shows the numbers of bed-nights generated by international tourists. Target shares in total visitor arrivals and length (days) of stay by origin region were employed to set the target bednights. Taking into account the different development stages of regional markets, it was assumed that the share of Europe will decrease while that of the rest of the world, especially Asia, will increase.

Table A. 117 Calculation of Target Bed-nights

Target Number of Foreign Tourist Arrivals by Origin								Unit : '000' tourists	
	The year 1993 [*]		The year 2000		The year 2005		The year 2010		
	No.	G. Rate [*]	No.	G. Rate ^{**}	No.	G. Rate [*]	No.	G. Rate [*]	
Europe	433	4.6%	594	6.6%	816	4.3%	1,008	5.1%	
(share-%)	55.8%		54.0%		51.0%		48.0%		
America	66	6.0%	99	9.2%	154	6.5%	210	7.0%	
(share-%)	8.5%		9.0%		9.6%		10.0%		
Africa	219	5.1%	310	8.3%	461	5.7%	609	6.2%	
(share-%)	28.1%		28.2%		28.8%		29.0%		
Asia	45	7.8%	77	12.6%	140	10.6%	231	10.0%	
(share-%)	5.8%		7.0%		8.7%		11.0%		
Oceania	14	5.4%	20	8.1%	30	6.9%	42	6.6%	
(share-%)	1.8%		1.9%		1.9%		2.0%		
Total	777.4	5.1%	1,100.0	7.8%	1,600.0	5.6%	2,100.0	6.0%	
(share-%)	100.0%		100.0%		100.0%		100.0%		

Estimated Tourist Bednights(,000) by Origin

	The year 1993 ^{***}		The year 2000		The year 2005		The year 2010	
	No.	G. Rate	No.	G. Rate	No.	G. Rate	No.	(93-2010)
Europe	7,895	4.4%	10,692	6.6%	14,691	4.3%	18,144	5.0%
(share-%)	78.7%		75.3%		69.8%		64.7%	
America	952	5.9%	1,426	9.3%	2,227	6.5%	3,045	7.1%
(share-%)	9.5%		10.0%		10.6%		10.9%	
Africa	685	8.8%	1,239	15.4%	2,534	9.3%	3,959	10.9%
(share-%)	6.8%		8.7%		12.0%		14.1%	
Asia	346	8.6%	616	15.3%	1,256	14.1%	2,426	12.1%
(share-%)	3.4%		4.3%		6.0%		8.7%	
Oceania	151	5.8%	224	8.1%	331	6.9%	462	6.8%
(share-%)	1.5%		1.6%		1.6%		1.6%	
Foreign Total	10,029	5.1%	14,196	8.2%	21,039	5.9%	28,035	6.2%
(share-%)	100.0%		100.0%		100.0%		100.0%	
Domestic Total	895	5.8%	1,328	6.8%	1,845	7.2%	2,612	6.5%
(including Foreign Residents)			5.8%		6.8%		7.2%	
National Total	10,924		15,524		22,884		30,647	

Note: * From "Statistical Year Book 1994", ** Indicates annual growth rates, *** From "Airport Questionnaire Survey"

Source: JICA Study Team

3.2. Target Numbers of Domestic Tourist Bed-nights

The figures on hotel bed-nights by domestic tourists were taken from the "Economic Survey 1994." It was assumed that the number of domestic tourists bed-nights will grow at the same growth rate as that of total GDP. The following Table A.118 shows the target bed-nights in the designated years.

Table A. 118 Target Number of Bed-nights (Domestic)

	1993	2000	2005	2010
Target Bed-nights (Domestic)	895	1,328	1,845	2,612

Unit: '000'

Note: VFR, Tents and "Restaurant/Hotel" users are not included

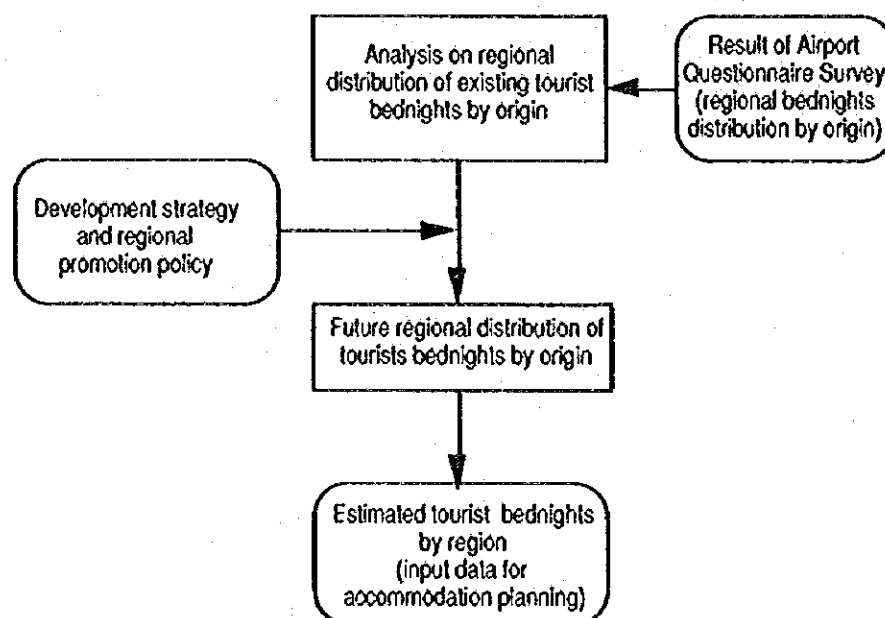
Source: JICA Study Team

4. Bed-Nights Distribution by Tourism Region

4.1. Methodology

The regional distributions of tourists' bed-nights were estimated to provide a framework for regional tourism development plans. The methodological flow chart for the target setting is shown in Figure A. 41.

Figure A. 41 Methodological Flowchart of Tourist Bednights Distribution



Note: Input data were acquired from the survey carried out by the study team and analyses of the Statistical Year Book 1994.

Source: JICA Study Team

4.2. Bed-Nights Distribution by Origin Region

The regional tourists' bednights distribution was analysed by tourist origin with the following categorisation :

- Europe (including Eastern Europe),
- America (both, North and South America),
- Africa,
- Asia (including Near and Middle East, South and East Asia), and
- Oceania.

Target international tourist distribution by tourism region was set based on the results of the airport survey conducted by the JICA study team. Estimation of domestic tourists' distribution is based on the information contained in "Statistical Abstract 1994."

(1) Existing Bed-Nights Distribution by Origin Region

The distribution pattern of tourist bednights by tourism regions and tourist origin countries is shown in Table A. 119.

Table A. 119 Existing Tourists' Bednights Distribution by Origin

	[Unit: '000' tourist]									
	Nairobi	Central Masai L.	West Turkana	NorthTana Bas	Coast	East	Total			
Europe	1,745	363	379	292	32	16	16	4,799	253	7,894
(Share)	22.1%	4.6%	4.8%	3.7%	0.4%	0.2%	0.2%	60.8%	3.2%	100.0%
America	471	94	77	75	31	16	0	178	9	952
(Share)	49.5%	9.9%	8.1%	7.9%	3.3%	1.7%	0.0%	18.7%	0.9%	100.0%
Africa	467	26	22	17	0	0	0	150	3	685
(Share)	68.1%	3.8%	3.2%	2.5%	0.0%	0.0%	0.0%	21.9%	0.5%	100.0%
Asia	203	15	9	3	1	1	0	114	0	346
(Share)	58.8%	4.2%	2.7%	0.8%	0.3%	0.2%	0.0%	33.0%	0.0%	100.0%
Oceanic	117	13	8	5	0	0	0	8	0	151
(Share)	77.3%	8.7%	5.1%	3.6%	0.0%	0.0%	0.0%	5.3%	0.0%	100.0%
Sub Total	3,002	511	495	393	64	33	16	5,250	265	10,028
(Share)	29.9%	5.1%	4.9%	3.9%	0.6%	0.3%	0.2%	52.4%	2.6%	100.0%
Domestic	183	89	85	68	12	5	3	405	46	895
(Share)	20.5%	9.9%	9.5%	7.6%	1.3%	0.6%	0.3%	45.2%	5.1%	100.0%
Total	3,186	600	580	461	76	38	18	5,654	310	10,923
(Share)	29.2%	5.5%	5.3%	4.2%	0.7%	0.3%	0.2%	51.8%	2.8%	100.0%

Source: "Statistical Abstract 1994," JICA Study Team

The prevailing characteristics are summarised as follows :

- 85 % of bednights are generated by tourists from Europe,
- International tourists, except those from Europe, stay in Nairobi the longest,

- Masailand is the most popular tourist destinations other than Nairobi and the coast,
- Only small percentages of the tourists from North America, Asia and Oceania stay in the coast,
- Domestic tourists have similar preference for the coast as Europeans tourists, and
- Turkana, North and Tana Basins are the destinations primarily for special interest tourists.

(2) Target Bed-Nights Distribution by Origin Region

Future bednight distributions were determined by tourist origin region based on the following assumptions. The results of the calculation are shown in Table A. 120, Table A. 121 and Table A. 122.

- The share of Nairobi and the Coastal Tourism Region will decrease as European tourists will be encouraged to stay longer in inland areas. Tourists from North America, Africa and Asia will be lured out to the coast for cultural attractions.
- The share of Masailand will decrease as new tourism products will be developed in other regions.
- The share of Central and Western will increase as new tourism products are planned in the regions.
- Adventure tourism will be promoted in the North, Tana Basin and Eastern Tourism Regions. The share of the three regions will be 6-7 % by 2010.

Table A. 120 Regional Tourist Bednights Distribution by Origin(2000)

	Nairobi	Central Masai L.	West Turkana	NorthTana Bas	Coast	East	Total			
Europe	2,349	588	481	460	43	18	17	6,308	428	
(Share)	22.0%	5.5%	4.5%	4.3%	0.4%	0.2%	0.2%	59.0%	4.0%	100.0%
America	664	164	114	121	47	21	1	271	21	
(Share)	46.6%	11.5%	8.0%	8.5%	3.3%	1.5%	0.1%	19.0%	1.5%	100.0%
Africa	817	62	37	37	1	0	0	271	12	
(Share)	66.0%	5.0%	3.0%	3.0%	0.1%	0.0%	0.0%	21.9%	1.0%	100.0%
Asia	314	46	18	18	2	1	1	203	12	
(Share)	51.0%	7.5%	3.0%	2.9%	0.3%	0.2%	0.1%	33.0%	2.0%	100.0%
Oceanic	154	25	11	10	1	0	1	17	4	
(Share)	69.0%	11.0%	5.0%	4.5%	0.5%	0.0%	0.5%	7.5%	2.0%	100.0%
Sub Total	4,299	885	662	646	94	41	20	7,070	478	14,196
(Share)	30.3%	6.2%	4.7%	4.6%	0.7%	0.3%	0.1%	49.8%	3.4%	100.0%
Annual Growth	5.3%	8.2%	4.2%	7.4%	5.6%	3.2%	3.6%	4.3%	8.8%	5.1%
Domestic	252	159	113	120	20	7	7	579	72	1,328
(Share)	19.0%	12.0%	8.5%	9.0%	1.5%	0.5%	0.5%	43.6%	5.4%	100.0%
Total	4,552	1,044	775	766	114	47	27	7,650	550	15,524
(Share)	29.3%	6.7%	5.0%	4.9%	0.7%	0.3%	0.2%	49.3%	3.5%	100.0%
Annual Growth	5.23%	8.25%	4.23%	7.53%	6.02%	3.21%	5.52%	4.41%	8.52%	5.15%

Source: JICA Study Team

Table A. 121 Regional Tourist Bednights Distribution by Origin (2005)

	Nairobi	Central Masai L.	West Turkana	NorthTana Bas	Coast	East	Total			
Europe	3,227	955	661	734	88	22	147	8,196	661	
(Share)	22.0%	6.5%	4.5%	5.0%	0.6%	0.2%	1.0%	55.8%	4.5%	100.0%
America	795	323	167	223	111	29	56	445	78	
(Share)	35.7%	14.5%	7.5%	10.0%	5.0%	1.3%	2.5%	20.0%	3.5%	100.0%
Africa	1,495	165	76	127	25	0	13	570	63	
(Share)	59.0%	6.5%	3.0%	5.0%	1.0%	0.0%	0.5%	22.5%	2.5%	100.0%
Asia	502	126	57	60	31	3	19	402	57	
(Share)	40.0%	10.0%	4.5%	4.8%	2.5%	0.2%	1.5%	32.0%	4.5%	100.0%
Oceanic	180	41	17	25	18	0	8	26	15	
(Share)	54.4%	12.5%	5.0%	7.5%	5.5%	0.1%	2.5%	8.0%	4.5%	100.0%
Sub Total	6,200	1,609	977	1,169	274	54	242	9,640	874	21,039
(Share)	29%	8%	5%	6%	1%	0%	1%	46%	4%	100.0%
Annual Growth	7.6%	12.7%	8.1%	12.6%	23.9%	5.7%	64.3%	6.4%	12.8%	
Domestic	351	240	157	203	83	9	65	646	92	1,845
(Share)	19.0%	13.0%	8.5%	11.0%	4.5%	0.5%	3.5%	35.0%	5.0%	100.0%
Total	6,550	1,849	1,134	1,372	357	63	307	10,286	966	22,884
(Share)	28.6%	8.1%	5.0%	6.0%	1.6%	0.3%	1.3%	44.9%	4.2%	100.0%
Annual Growth	7.55%	12.11%	7.91%	12.36%	25.69%	5.86%	62.72%	6.10%	11.92%	8.07%

Source: JICA Study Team

Table A. 122 Regional Tourist Bednights Distribution by Origin (2010)

	Nairobi	Central Masal L.	West Turkana	NorthTana Bas	Coast	East	Total			
Europe	3,629	1,270	816	998	272	54	272	9,979	853	
(Share)	20.0%	7.0%	4.5%	5.5%	1.5%	0.3%	1.5%	55.0%	4.7%	100.0%
America	914	487	213	335	198	46	91	639	122	
(Share)	30.0%	16.0%	7.0%	11.0%	6.5%	1.5%	3.0%	21.0%	4.0%	100.0%
Africa	2,177	297	119	253	59	20	4	910	119	
(Share)	55.0%	7.5%	3.0%	6.4%	1.5%	0.5%	0.1%	23.0%	3.0%	100.0%
Asia	800	303	109	206	97	12	49	728	121	
(Share)	33.0%	12.5%	4.5%	8.5%	4.0%	0.5%	2.0%	30.0%	5.0%	100.0%
Oceanic	192	65	23	46	39	5	23	46	23	
(Share)	41.5%	14.0%	5.0%	10.0%	8.5%	1.0%	5.0%	10.0%	5.0%	100.0%
Sub Total	7,712	2,422	1,281	1,839	666	137	439	12,303	1,238	28,035
(Share)	26%	9%	5%	7%	2%	0%	2%	44%	4%	100.0%
Annual Growth	4.46%	8.52%	5.56%	9.48%	19.39%	20.48%	12.62%	5.00%	7.21%	
Domestic	470	313	209	235	91	26	104	1,019	144	2,612
(Share)	18.0%	12.0%	8.0%	9.0%	3.5%	1.0%	4.0%	39.0%	5.5%	100.0%
Total	8,182	2,736	1,490	2,074	757	163	544	13,322	1,381	30,647
(Share)	26.7%	8.9%	4.9%	6.8%	2.5%	0.5%	1.8%	43.5%	4.5%	100.0%
Annual Growth	4.55%	8.15%	5.61%	8.61%	16.20%	20.89%	12.11%	5.31%	7.42%	6.02%

Source: JICA Study Team

4.3. Bed-Nights' Distribution Plan by Tourism Region

The estimated tourist bednights by tourism region are summarised in the Table A. 123. These figures are input data for estimating accommodation requirements discussed in the following section.

Table A. 123 Estimated Tourist Bednights by Region

	The year 1993		The year 2000		The year 2005		The year 2010	
	Number	Growth	Number	Growth	Number	Growth	Number (2010/1993)	
Nairobi	3,186	5.2%	4,552	7.6%	6,550	4.5%	8,182	2.57
(share)	29.2%		29.3%		28.6%		26.7%	(times)
Central	600	8.2%	1,044	12.1%	1,849	8.1%	2,736	4.56
(share)	5.5%		6.7%		8.1%		8.9%	(times)
Masailand	580	4.2%	775	7.9%	1,134	5.6%	1,490	2.57
(share)	5.3%		5.0%		5.0%		4.9%	(times)
Western	461	7.5%	766	12.4%	1,372	8.6%	2,074	4.50
(share)	4.2%		4.9%		6.0%		6.8%	(times)
Turkana	76	6.0%	114	25.7%	357	16.2%	757	10.01
(share)	0.7%		0.7%		1.6%		2.5%	(times)
Northern	38	3.2%	47	5.9%	63	20.9%	163	4.28
(share)	0.3%		0.3%		0.3%		0.5%	(times)
Tana Basin	18	5.5%	27	62.7%	307	12.1%	544	29.43
(share)	0.2%		0.2%		1.3%		1.8%	(times)
Coastal	5,654	4.4%	7,650	6.1%	10,288	5.3%	13,322	2.36
(share)	51.8%		49.3%		44.9%		43.5%	(times)
Eastern	310	8.5%	550	11.9%	966	7.4%	1,381	4.45
(share)	2.8%		3.5%		4.2%		4.5%	(times)
Totals	10,923	5.2%	15,524	8.1%	22,884	6.0%	30,647	2.81
(share)	100.0%		100.0%		100.0%		100.0%	(times)

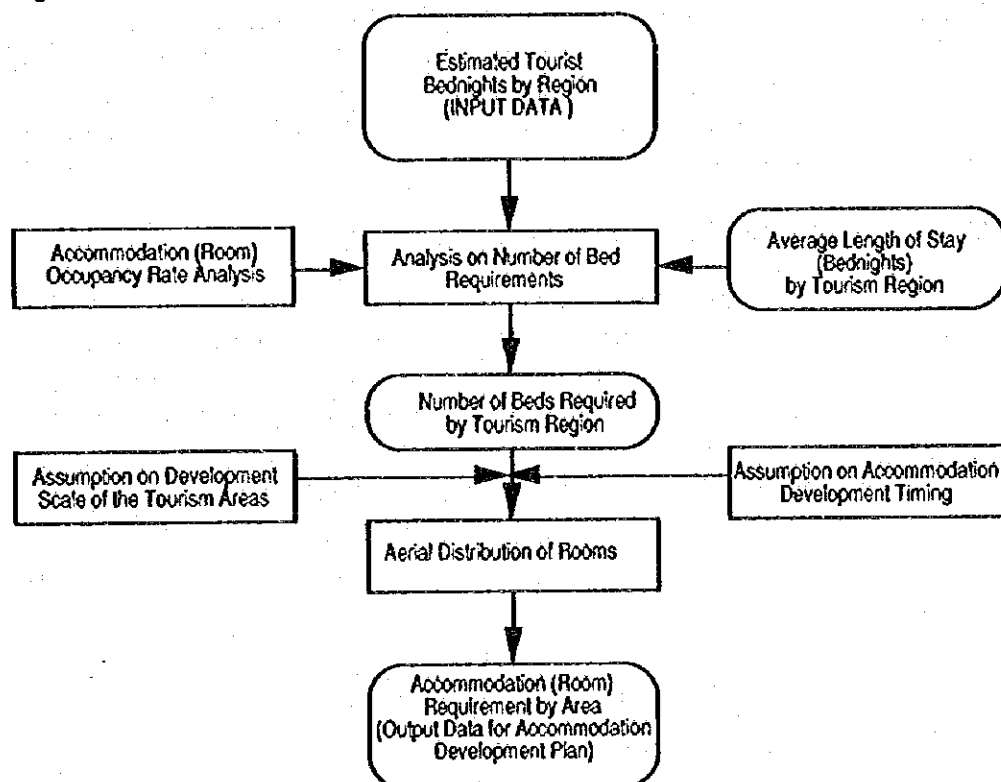
Source: JICA Study Team

5. Accommodation Requirements

5.1. Methodology

Accommodation requirements in each tourism region and area have been estimated based on the tourist bednight distribution plan. The methodological flow chart for this estimation is shown in Figure A. 42.

Figure A. 42 Work Flowchart of Accommodation Requirement Estimation



Note: Input data come from the survey carried out by the study team and analyses of the Statistical Year Book 1994.

Source: JICA Study Team

5.2. Types of Accommodations

Accommodation facilities are divided into the following three types :

Hotel/Lodge/Permanent Camp

These accommodation facilities are most popular accommodation facilities among tourists. This includes permanently installed camps that are provided permanent supply of water, sewer and power system.

Home stay/Villa/Apartment/Tent

Private ranches in the Central Tourism Region, villas and apartments as used by tourists in the Coastal Tourism Region, and tents for tented safaris are categorised in this category. Information on this type of accommodation is not fully available, and also not managed or controlled by tourism related organisations.

VFR and Others

Some tourists' visit their friends and relatives living in Kenya, especially in Nairobi and its vicinity. Greater part of domestic tourists are supposed to use this type accommodation. This type of accommodation facilities is excluded from the tourism facilities plan in this master plan.

5.3. Number of Beds Required by Tourism Region

The numbers of beds required in Tourism Regions and Areas provide the basis for tourist facility planning. Factors examined are accommodation occupancy rate, average length of stay, and appropriate accommodation type in each Region and Area.

Table A. 124 Analysis on Accommodation Usage

	*Nairobi	Central	Masai L	West	Turkana	North Tana	B. Coast	East	TOTAL	
Existing bednights (1993)	3,186	600	580	461	76	38	18	5,654	310	10,923
Hotel & Lodge bednights										
Reported Bed-night('000)	1,148	369	373	186		8		3,762	342	6,188
Available bednights ('000)	2,918	1,414	1,268	555	23	18	52	7,189	433	13,870
Number of beds	7,995	3,873	3,475	1,521	64	48	142	19,696	1,185	37,999
**Bed Occupancy Rate	39.3%	26.1%	29.4%	33.4%	0.0%	47.4%	0.0%	52.3%	79.1%	44.6%
Room Occupancy Rate	46.3%	30.7%	34.6%	39.3%	0.0%	55.7%	0.0%	61.6%	93.1%	52.5%
Visitors who used hotel (%)	36.0%	61.5%	64.3%	40.3%	0.0%	21.6%	0.0%	66.5%	110.3%	56.7%
Bed nights other than hotels ('000)	2,038	231	207	275	76	30	18	1,892	-32	4,735
***number of beds other than H & L	10,947	1,239	1,114	1,478	406	160	99	10,165	-172	25,436
***Ave. length of stay (nights)	6.0	3.0	1.7	4.0	5.0	1.5	1.5	14.0	1.5	12.9
Visitor Arrivals ('000)	531	200	341	115	15	25	12	404	207	

Note: * "Nairobi" includes Kiambu district

** 1.7 person per room (i.e. one room has 2 beds=0.85 persons per bed). Room occupancy rate was calculated from the bed occupancy rate.

*** Figures come from the airport survey results.

Source: Economic Survey 1994, Data from MOTW and JICA Study Team

As no data on the bednights generated by villa/apartment/tents and VFR is provided by the government statistics, it was estimated from the difference between the reported bednights and the existing bednights calculated from the airport survey and immigration statistics.

National average of room occupancy rate is 52.5%, which is below the internationally-accepted minimum profitable level of 60% and therefore needs improvement.

(1) Accommodation Occupancy Rate and Bed Occupancy rate

Assumptions as shown in Table A. 125 are made to set the annual target occupancy rates. The figures reflect the interviews with tour operators and hoteliers in Kenya. Occupancy rates differ by season, type of accommodation, location, type of guests, and level of service provided.

Table A. 125 Assumed Target Occupancy Rate by Type of Tourism

Type: Urban				Type: Nature Watching				Type: Tented Safari				Type: Resort			
Month	Tourism Season			Month	Tourism Season			Month	Tourism Season			Month	Tourism Season		
	high	med	low		high	med	low		high	med	low		high	med	low
Jan	0.85			Jan	0.8			Jan	0.8			Jan	0.95		
Feb	0.85			Feb	0.8			Feb	0.8			Feb	0.95		
Mar	0.85			Mar	0.8			Mar	0.8			Mar	0.95		
Apr		0.65		Apr		0.3		Apr		0.1		Apr		0.3	
May		0.65		May		0.3		May		0.1		May		0.3	
Jun		0.65		Jun		0.3		Jun		0.1		Jun		0.3	
Jul	0.85			Jul	0.8			Jul	0.8			Jul	0.95		
Aug	0.85			Aug	0.8			Aug	0.8			Aug	0.95		
Sep		0.65		Sep		0.5		Sep		0.3		Sep		0.4	
Oct		0.65		Oct		0.5		Oct		0.3		Oct		0.4	
Nov		0.65		Nov		0.5		Nov		0.3		Nov		0.4	
Dec	0.85			Dec	0.8			Dec	0.8			Dec	0.95		
	5.1	1.95	1.95		4.8	1.5	0.9		4.8	0.9	0.3		5.7	1.2	0.9
Average Rate	0.75			Average Rate	0.6			Average Rate	0.5			Average Rate	0.65		

Source: JICA Study Team

(2) Types of Accommodations to be Developed in Tourism Regions

Types of accommodations to be developed in respective Tourism Regions depend largely on the characteristics of the tourism activities expected in the region. For example, tents will not be suitable in urban areas or cultivated land areas while hotel and lodge type accommodations do not meet tourists' needs to experience the wilderness of Africa in remote areas.

Shares of hotel and lodge bednights in Tourism Regions are assumed based on the existing conditions and the future direction for development.

(3) Number of Beds Required by Type of Accommodation and Region

Number of beds required for Tourism Regions by accommodation type are calculated on the basis of the assumption as has been described. The results are shown in the following tables.

Table A.126 Number of Beds Required in 2000

	Nairobi	Central Masai L	West Turkana	North Tana B.	Coast	East	TOTAL			
Visitor Arrivals ('000)	785	261	431	191	23	24	11	588	367	-
Average Length of Stay (nights)	5.8	4	1.8	4	5	2	2.5	13	1.5	-
Visitor Bed Nights('000)	4,552	1,044	775	766	114	47	27	7,650	550	15,524
Bed Occupancy Rate	51.0%	46.8%	42.5%	42.5%	34.0%	42.5%	29.8%	55.3%	51.0%	51.3%
Accom.(room) Occupancy Rate	0.60	0.55	0.50	0.50	0.40	0.50	0.35	0.65	0.60	60%
Number of Beds Required	24,452	6,119	4,995	4,935	918	306	248	37,932	2,954	82,860

Number of Beds Required By Type of Accommodation Facilities

	Nairobi	Central Masai L	West Turkana	North Tana B.	Coast	East	TOTAL			
Hotel, Lodge & Camp(permanent)	13,449	4,589	4,246	3,948	643	183	161	26,553	2,511	56,293
(%)	55%	75%	85%	80%	70%	60%	65%	70%	85%	68%
Other Accommodation	1,223	1,407	749	494	275	122	87	7,586	443	12,387
(%)	5%	23%	15%	10%	30%	40%	35%	20%	15%	15%
Tents	0	306	250	247	275	122	87	0	443	1,730
(%)	0%	5%	5%	5%	30%	40%	35%	0%	15%	2%
Private Ranch/Appartment	1,223	1,101	500	247	0	0	0	7,586	0	10,657
(%)	5%	18%	10%	5%	0%	0%	0%	20%	0%	13%
VFR and Others	9,781	122	0	494	0	0	0	3,793	0	14,190
(%)	40%	2%	0%	10%	0%	0%	0%	10%	0%	17%

Source: JICA Study Team

Table A. 127 Number of Beds Required in 2005

	Nairobi	Central	Masai L	West	Turkana	North	Tana B.	Coast	East	TOTAL
Visitor Arrivals ('000)	1,213	462	597	305	71	25	77	857	483	
Average Length of Stay (nights)	5.4	4	1.9	4.5	5	2.5	4	12	2	
Visitor Bed Nights('000)	6,550	1,849	1,134	1,372	357	63	307	10,286	966	22,884
Bed Occupancy Rate	55.3%	51.0%	46.8%	46.8%	42.5%	42.5%	42.5%	55.3%	51.0%	53.1%
Accom.(room) Occupancy Rate	0.65	0.60	0.55	0.55	0.50	0.50	0.50	0.65	0.60	63%
Number of Beds Required	32,481	9,934	6,645	8,040	2,304	406	1,979	51,005	5,189	117,934
Number of Beds Required By Type of Accommodation Facilities										
										UNIT : beds
	Nairobi	Central	Masai L	West	Turkana	North	Tana B.	Coast	East	TOTAL
Hotel, Lodge & Camp(permanent)	19,489	7,451	5,981	6,834	1,613	244	1,385	38,254	4,411	85,666
(%)	60%	75%	90%	85%	70%	60%	70%	75%	85%	73%
Other Accommodations	1,624	2,285	665	402	691	163	594	7,651	778	14,852
(%)	5%	23%	10%	5%	30%	40%	30%	15%	15%	13%
Tents	0	497	332	0	691	163	594	0	778	3,055
(%)	0%	5%	5%	0%	30%	40%	30%	0%	15%	3%
Private Ranch/Home Stay	1,624	1,788	332	402	0	0	0	7,651	0	11,797
(%)	5%	18%	5%	5%	0%	0%	0%	15%	0%	10%
VFR & Others	11,368	199	0	804	0	0	0	5,100	0	17,472
(%)	35%	2%	0%	10%	0%	0%	0%	10%	0%	15%

Source: JICA Study team

Table A. 128 Number of Beds Required in 2010

	Nairobi	Central	Masai L	West	Turkana	North	Tana B.	Coast	East	TOTAL
Visitor Arrivals ('000)	1,636	684	745	415	151	54	109	1,110	691	
Average Length of Stay (nights)	5	4	2	5	5	3	5	12	2	
Visitor Bed Nights('000)	8,182	2,736	1,490	2,074	757	163	544	13,322	1,381	30,647
Bed Occupancy Rate	63.8%	55.3%	51.0%	51.0%	46.8%	46.8%	46.8%	55.3%	55.3%	56.2%
Accom.(room) Occupancy Rate	0.75	0.65	0.60	0.60	0.55	0.55	0.55	0.65	0.6	66%
Number of Beds Required	35,162	13,565	8,002	11,140	4,437	954	3,186	66,060	6,850	149,357
Number of Beds Required By Type of Accommodation Facilities										
										UNIT : beds
	Nairobi	Central	Masai L	West	Turkana	North	Tana B.	Coast	East	TOTAL
Hotel, Lodge & Camp(permanent)	22,856	10,852	7,602	10,026	3,106	620	2,389	49,545	6,165	113,161
(%)	65%	80%	95%	90%	70%	65%	75%	75%	90%	76%
Other Accommodations	3,516	2,442	400	557	1,331	334	796	9,909	685	19,971
(%)	10%	18%	5%	5%	25%	35%	25%	15%	10%	13%
Tents	0	407	0	0	1,331	334	796	0	685	3,553
(%)	0%	3%	0%	0%	30%	35%	25%	0%	10%	2%
Private Ranch/Home Stay	3,516	2,035	400	557	0	0	0	9,909	0	16,417
(%)	10%	15%	5%	5%	0%	0%	0%	15%	0%	11%
VFR & Others	8,791	271	0	557	0	0	0	6,606	0	16,225
(%)	25%	2%	0%	5%	0%	0%	0%	10%	0%	11%

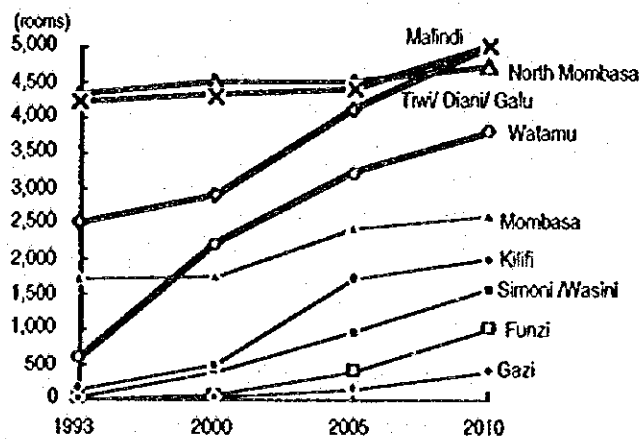
Source: JICA Study Team

5.4. Accommodation Distribution Plan

(1) Development Timing and Scale of Tourism Areas

Timing and scales of development are examined in order to distribute the number of rooms over designated tourism areas. Factors that have been considered are : (1) land availability in consideration of environmental conditions; (2) development potential to meet market need and, (3) infrastructure availability and possibility for its development. Figures A. 43 and A. 44 show, as an example, the timing and scale of development in the Coastal Tourism Region.

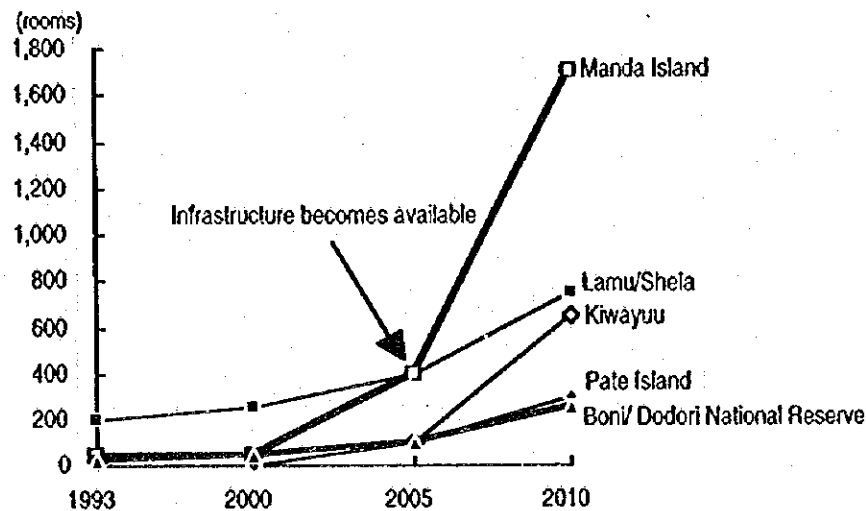
Figure A. 43 Number of Rooms in the Coastal Tourism Region



Source: JICA Study Team

At present, North Mombasa, Diani and Malindi are the major tourist bases in the Coastal Tourism Region. They should be developed so as to cater for the mass tourism market segment as the areas have good accessibility from the Mombasa Airport. Improvement of utility supplies to increase accommodation capacity and development of a sewerage system for environmental sustainability would be the core strategy for development. Watamu and the South of Diani beach will be the areas where capacity expansion should have special importance as the areas have sufficient space for tourism development.

Figure A. 44 Number of Rooms in The Coast Tourism Region (Lamu & Northern Coast)



Source: JICA Study Team

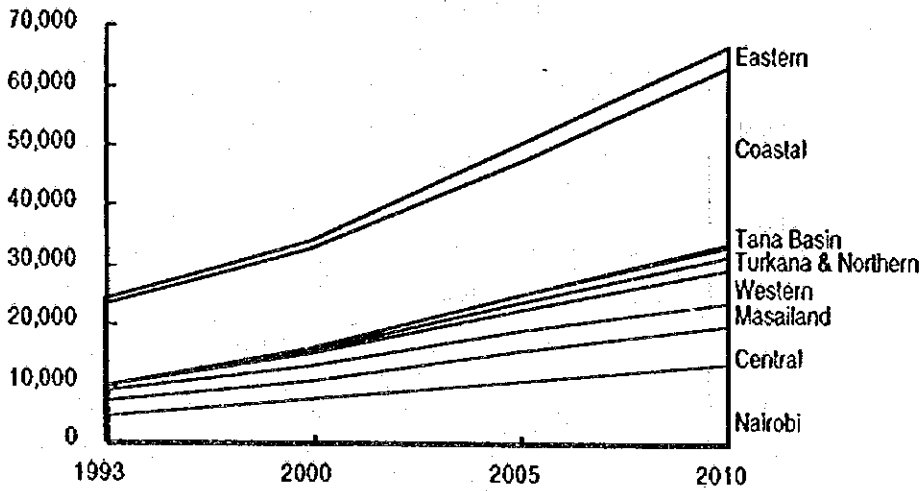
As for Lamu and the Northern Coast, primary issues are environmental protection and infrastructure development. The land suitable for tourism development is along the Eastern coast of Manda Island, though water supply is a major constraint at present. As the source of water for the area is Tana river, it will take several years to remove the constraint. Therefore, major tourism development is assumed to take place when infrastructure development has been completed.

Tourism development in Boni/Dodori National Reserve will be similar in style as in the national parks and reserves in the inland. All the accommodation facilities should provide their own utilities and be responsible for sewerage disposal (environmental sustainability). Transportation should be limited to sea transport. An appropriate marketing strategy for the area should be the "low-volume high-income" market segment, as the construction, operation and maintenance costs will be high.

(2) Accommodation Distribution Plan

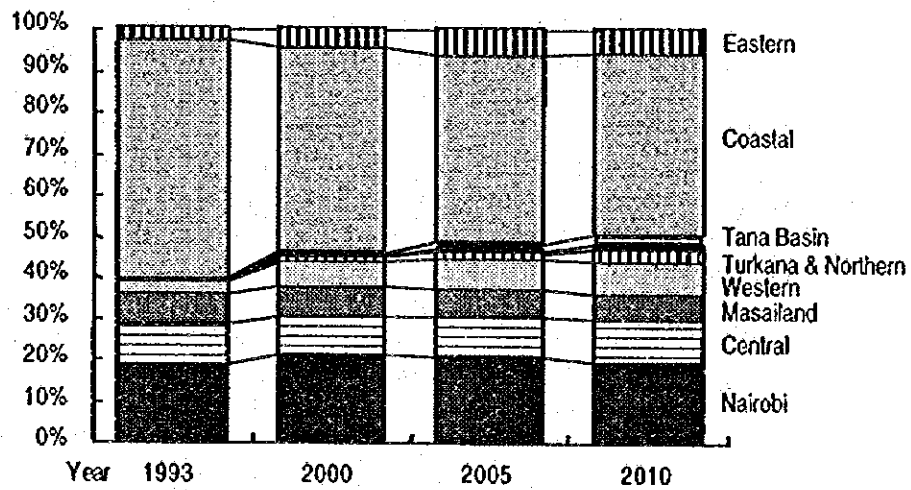
Based on the timing and scale of development as described in the previous section, the number of rooms allocated in the respective tourism regions are distributed over their tourism areas as shown in Table A. 129. Figures A. 45 and A. 46 visualise the accommodation capacity growth in order to give a better understanding of the distribution plan.

Figure A. 45 Accomodation Development Target by Tourism Region



Source: JICA Study Team

Figure A. 46 Accommodation Share by Tourism Region



Source: JICA Study Team

Table A. 129 Accommodation Distribution Plan up-to Year 2010 (1/2)

Tourism Region (Total)	Location	Unit Number of Rooms											
		Hotel/Lodge/Permanent Camp				Homestay/Mtla/Appartment/Tent				Total			
		Existing	2000	2005	2010	Existing	2000	2005	2010	Existing	2000	2005	2010
11 Nairobi	Region total	4,000	6,700	9,700	11,400	600	600	800	1,750	4,600	7,300	10,500	13,150
	Suburban	608	2500	4200	5100	0	100	200	750	608	2,600	4,400	5,850
	City hotel	3,392	4200	5500	6300	600	500	600	1000	3,992	4,700	6,100	7,300
10 Central	Region total	1,901	2,370	3,750	5,400	370	720	1,140	1,220	2,271	3,090	4,890	6,620
12 Lake Nakuru/Naivasha	Naibasha	155	300	600	1100	50	90	170	170	205	390	770	1,270
12 Lake Nakuru/Naivasha	Nakuru	518	600	850	1100	10	30	50	70	528	630	900	1,170
13 Mt. Aberdare	Nyeri	459	500	800	1100	50	80	100	120	509	580	900	1,220
14 West Samburu	Mararat	31	50	100	150	100	120	170	170	131	170	270	320
15 East Samburu/Somal	Ishiole	323	400	500	600	100	100	100	100	423	500	600	700
	Ishiole	0	0	0	0	50	250	400	440	50	250	400	440
16 Mt. Kenya	Nanyuki	296	400	700	1100	10	50	150	150	306	450	850	1,250
	Meru	51	50	100	150	0	0	0	0	51	50	100	150
17 Embu/Murang'a	Embu	69	70	100	150	0	0	0	0	69	70	100	150
20 Masailand	Region total	1,737	2,120	3,000	3,800	3	375	350	200	1,740	2,495	3,350	4,000
21 Amboseli	Oi Tukai	347	350	350	350	0	0	0	0	347	350	350	350
	Namanga	58	100	350	550	0	0	0	0	58	100	350	550
	Eastern Gate	214	220	250	300	0	0	0	0	214	220	250	300
22 Mid Masailand	Magadi		200	350	550	0	200	200	200	0	400	550	750
23 Masai Mara	Keekorok	463	450	450	450	0	0	0	0	463	450	450	450
	Main Gate	277	400	750	1000	3	175	150	0	280	575	900	1,000
	western gate	252	250	300	350	0	0	0	0	252	250	300	350
	eastern gate	127	150	200	250	0	0	0	0	127	150	200	250
30 Western	Region total	764	1,950	3,400	5,010	5	240	200	280	769	2,190	3,600	5,290
31 Kericho/Kisi	Kericho	80	200	500	850	0	0	0	0	80	200	500	850
32 Southern Victoria		84	80	120	140	0	0	0	0	84	80	120	140
33 Northern Victoria	Kisumu	187	500	700	850	0	0	0	0	187	500	700	850
	Kakamega	77	100	200	300	0	0	0	0	77	100	200	300
34 Mt. Elgon	Kitale	8	300	650	1000	5	110	120	200	13	410	770	1,200
	Mt. Elgon	20	120	250	450	0	0	40	80	20	120	280	530
35 Pkoi	Nasoiot	0	50	80	120	0	130	40	0	0	180	120	120
36 Rift Valley Lakes	Baringo	143	400	600	850	0	0	0	0	143	400	600	850
37 Eldoret		165	200	300	450	0	0	0	0	165	200	300	450
40 Turkana	Region total	48	320	800	1,550	0	135	345	660	48	455	1,145	2,210
41 Northern Turkana	Koobi Fora			50	150	0	45	140	260	0	45	180	410
42 Central Turkana	Kalokol	20	100	200	300	0	0	0	0	20	100	200	300
	Allia Bay	0	140	250	500	0	45	135	250	0	185	385	750
43 Southern Turkana	Loyangalani	28	80	300	600	0	45	70	150	28	125	370	750

Source: JICA Study Team

Table A. 129 Accommodation Distribution Plan up-to Year 2010 (2/2)

Unit: Number of Rooms

Tourism Region (Total)	Location	Hotel/Lodge/Permanent Camp				Homestay/Mtba/Appartment/Tent				Total				
		Existing	2000	2005	2010	Existing	2000	2005	2010	Existing	2000	2005	2010	
50 Northern	Region total	24	90	120	310	0	50	80	165	24	140	200	475	
	51 Marsabit	Marsabit	24	90	120	250	0	20	40	80	24	110	180	330
	52 Losai	Laisamis	0	0	0	60	0	30	40	85	0	30	40	145
	53 Maka		0	0	0	0	0	0	0	0	0	0	0	
60 Tana Basin	Region total	71	81	700	1,200	0	40	300	400	71	121	1,000	1,600	
	61 Western Tana Basin	Meru N.P.	60	70	250	400	0	20	50	80	60	90	300	480
		Usuemi			250	350	0	20	150	200	0	20	400	550
	62 Mid Tana Basin	Garissa	0	0	50	150	0	0	50	50	0	0	100	200
	63 Eastern Tana Basin	Garsen	11	11	150	300	0	0	50	70	11	11	200	370
70 Coastal	Region total	9,820	13,280	19,120	24,750	4,000	3,800	3,800	4,950	13,820	17,080	22,920	29,700	
	71 South Mombasa Coast	Wasini	31	300	850	1300	0	100	100	250	31	400	950	1,550
		Funzi	15	80	400	1000	0	0	0	0	15	80	400	1,000
		Gazi	20	50	170	400	0	0	0	0	20	50	170	400
		Mt. Diani/ Galu	2514	2900	4100	4700	0	0	0	300	2,514	2,900	4,100	5,000
	72 Mombasa Coast	Mombasa	800	850	1500	1700	900	900	900	900	1,700	1,750	2,400	2,600
		N. Mombasa	4300	4500	4500	4700	0	0	0	0	4,300	4,500	4,500	4,700
	73 Malindi Coast	Kilifi	150	500	1700	2000	0	0	0	0	150	500	1,700	2,000
		Watamu	600	2200	3200	3800	0	0	0	0	600	2,200	3,200	3,800
		Malindi	1200	1600	1700	1800	3000	2700	2700	3200	4,200	4,300	4,400	5,000
	74 Lamu Coast	Lamu/Sheela	100	150	300	500	100	100	100	250	200	250	400	750
		Manda Is.	50	50	400	1700	0	0	0	0	50	50	400	1,700
		Pate Is.	0	0	100	300	0	0	0	0	0	0	100	300
	75 Northern Coast	Kiwayu	20	50	100	650	0	0	0	0	20	50	100	650
		Boya/Duburi N.R.	20	50	100	200	0	0	0	50	20	50	100	250
80 Eastern	Region total	584	1,260	2,600	3,060	0	220	390	340	584	1,480	2,990	3,420	
	81 Chyulu	Emali	0	0	50	80	0	0	0	0	0	50	80	
		Kibuwezi	60	60	100	80	0	0	0	60	60	100	80	
	82 Eastern Tsavo	Mt. East Tsavo N.P.	96	300	750	850	0	0	0	96	300	750	850	
		Mutomo	32	50	100	120	110	200	170	32	160	300	290	
		Mutomo	0	50	100	200	0	0	0	0	50	100	200	
	83 Southern Tsavo	Mt. East Tsavo N.P.	30	100	200	300	0	0	0	30	100	200	300	
		Mackinnon	20	50	100	120	0	110	190	170	20	160	290	290
		Mackinnon	0	0	50	80	0	0	0	0	0	50	80	
	84 Western Tsavo	Nothe marea	117	250	450	500	0	0	0	117	250	450	500	
		Taita Hill	209	350	600	650	0	0	0	209	350	600	650	
		Tsavo	20	50	100	100	0	0	0	20	50	100	100	
G. Total	-	18,948	28,171	43,190	56,500	4,978	6,180	7,405	9,965	23,926	34,351	50,595	66,465	

Source: JICA Study Team

JICA

