

GOVERNMENT OF KENYA

MINISTRY OF TOURISM AND WILDLIFE

COVID-19 AND TRAVEL AND TOURISM IN KENYA: PRODUCT IMPROVEMENT AND DIVERSIFICATION POLICY BRIEF

JUNE, 2020

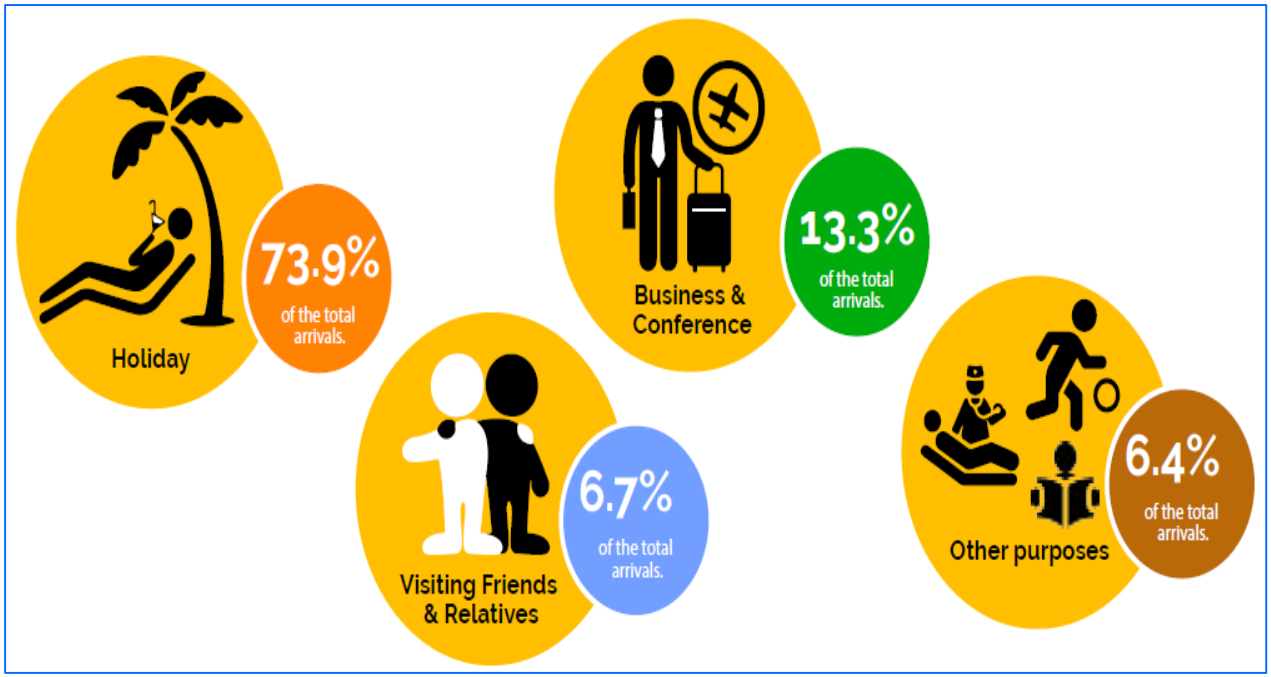
Introduction

Kenya's key tourism products have mainly centered on African Safari and beach destinations. This is due to the fact that, the country is well endowed with a long coastline and a diversity of wildlife species.

Over the years, there has been over dependency on the nature-based products as the main source of tourism revenue and over 80 percent of the industry's earnings are driven by nature-based tours. Whilst recognizing the importance of nature-based products, much effort is needed to diversify the industry to include a wide range of other products.

Kenya's international tourism arrivals grew by 3.9% to 2.05 million in 2019, while domestic tourism grew from 3,645,144 in 2017 to 3,974,243 in 2018, recording a 9.03% growth (GoK, 2019). The major purpose of visit within the international market is holiday (73.9%) followed by business and conference tourism (13.3%), visiting friends and relatives (6.7%) and finally other purposes such as sports, medical related purposes and education (6.4%),

Tourists Visiting Kenya by Purpose of Visit



Source: GoK (2019)

Kenya's Tourism Experiences

The Kenya National Tourism Blueprint divides Kenya's tourism experiences as core (the main drivers of tourism to Kenya) and secondary (experiences that support the core experiences).

The classification is based on the state of readiness of the core tourism experiences based on the supply and quality of tourism products (resources, facilities and activities) in combination with the readiness of the market to consume the available products (GoK, 2017).

Core tourism experiences in Kenya










•**Beach and marine** • Coast	•**African Safari** • Masaai Mara and Amboseli	•**Wildlife** • Rift Valley, Central and Western	•**Nature** • Rift Valley, Western and Masaai Mara/ Amboseli	•**Scenic** • Central and Northern	•**Culture and Heritage** – Nairobi, Coast and Masaai Mara	•**City** • Nairobi	•Business Tourism • Nairobi, Coast

Source: MoTW (2017)

Secondary tourism experiences in Kenya





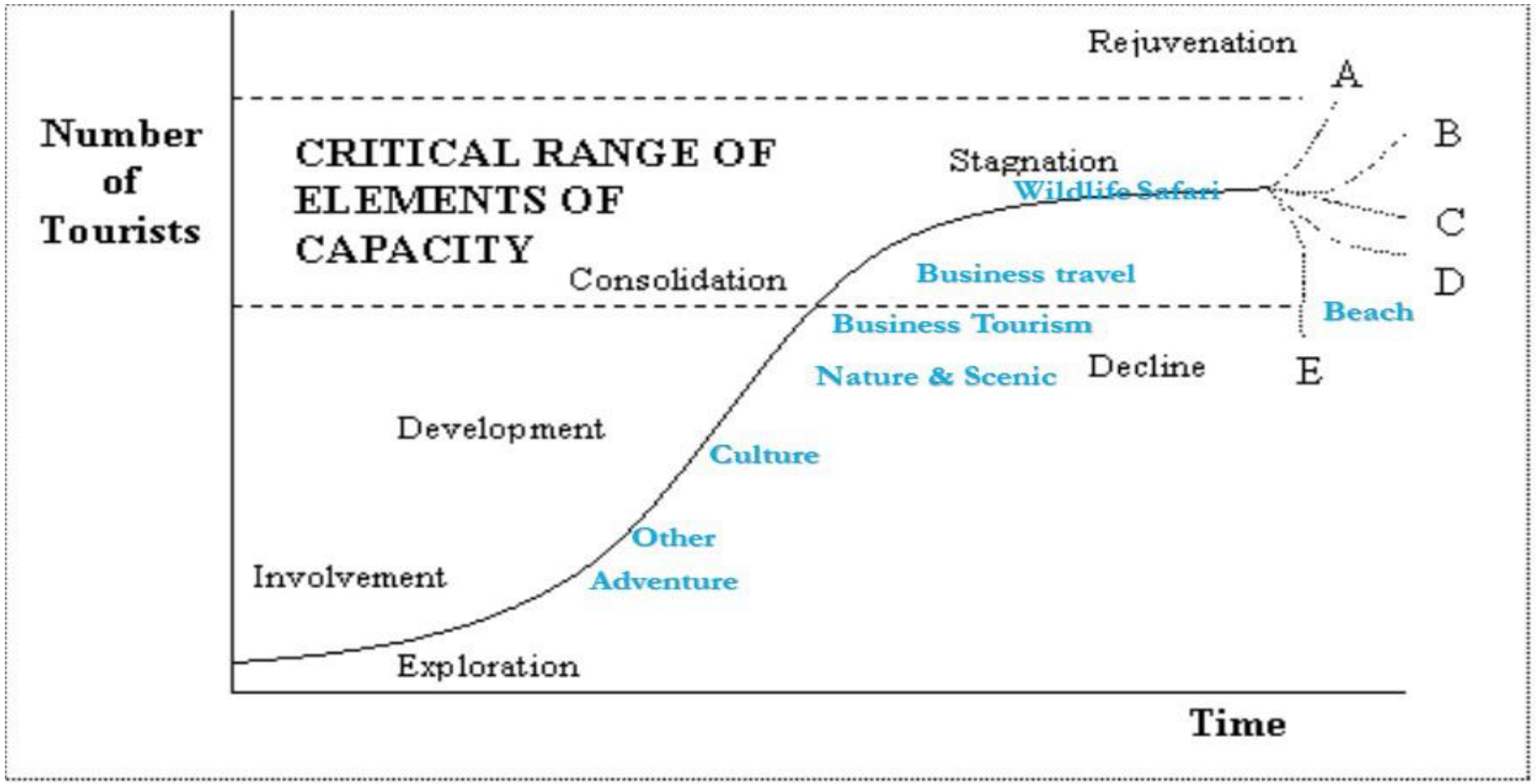

Adventure – Coast, Rift alley, Central	Sports – Nairobi, Coast, Rift Valley, Central	Desert – Northern	Other – Central, Rift Valley, Western

Source: MoTW (2017)

Classification of the Core Experiences

Most of the core experiences can be classified under consolidation, stagnation and decline and therefore requires innovation and rejuvenation, while most of the secondary experiences are under development stage, which needs to be developed and packaged.

Tourism experience lifecycle status



Source: MoTW (2017)

Key Areas of Product Diversification

Post-modern tourists are gradually becoming aware of the negative impacts of mass tourism and are increasingly looking for alternative tourism products that provide a deeper and more meaningful experience. Thus, if Kenya is to rejuvenate its tourism industry, there is need for the country to provide a diverse alternative tourism products which are more appealing to the post-modern tourists. Some of the key areas of diversification include:

- Business and Conference Tourism
- Sports Tourism
- Health and wellness tourism
- Cultural and Heritage tourism
- Shopping Tourism
- Medical Tourism
- Flora related tourism
- Photography
- Ecotourism
- Home Stays, Airbnb and general sharing economy concept
- Avitourism (Birding)
- Volunteerism (Communities and wildlife/nature conservation)

Product Improvement and Diversification Strategy

Improve the existing products

- Expand to new segments of existing markets and venture to new Markets.
- Increase marketing to the existing markets.

Diversify

- Refresh the products
- Refresh the markets/market segments
- Introduce new man-made attractions in different areas.
- Take advantage of the previously untapped natural resources.

Sustain

- Regulate the operations and investments in the area to ensure proper planning and sustainability of the product.
- Involve the community for sustainability and ensure that they benefit from the attraction.
- Campaigns on conservation and sustainability

Projects to Improve and Diversify Tourism Products

- **Capturing experiences and information** through the process of knowledge capturing.
- **Information provision and geospatial presentation of tourism resources in Kenya** to create an **Integrated Tourism Management System** with updated content from all the stakeholders using GIS.
- **Pricing revision for tourism products in Kenya** based on Willingness to Pay (WTP) and Willingness to Accept (WTA) economic models.
- **Identification and promotion of community-based tourism**
- **Identification and promotion of new and improved product and link to the market**
- **Packaging tourism products**
- **Interpretation of the tourism product**
- **Digital marketing**
- **Fight against the spread of disinformation**

Product Improvement and Diversification Recovery Strategy Implementation Matrix

Strategies	Implementation	Responsibility
1. Packaging tourism information and experiences		
Improvement and packaging of existing and new products and markets	Enhance and package the following new and improved products: – Beach tourism, Wildlife Tourism, Business and Conference Tourism, Cultural and Heritage tourism, Homestays, Airbnb and general sharing economy concept, Health and wellness tourism e.g. hot springs, natural forests and products linked to traditional healing, use of natural medicines etc., Medical Tourism, Ecotourism, Sports tourism, Shopping tourism, Avitourism (Birding), Photography, Voluntourism (Communities and wildlife/nature conservation), Flora related tourism	• KTB • County Governments • Private Sector
Develop new facilities and refresh and revamp existing facilities	• Identify gaps in the supply of new types and standards of accommodation, e.g. self-catering and timeshare facilities • Diversify the accommodation base in national reserves/parks and conservation/protected areas, e.g. self-catering, expand and upgrade camping facilities	• Private Sector • County Governments
Enhance and expand types of activities	• Improve on the existing activities and introduce new ones in parks and reserves, such as biking, walking, cultural experiences, special interest tours (e.g. birds, trees, and insects), etc. • Enhance existing adventure activities and expand the types of activities offered at key nodes, e.g. through activity centers, to include: a. Mountain/rock climbing b. Hiking c. Mountain biking d. Slackpacking e. River rafting f. Zip lining/bridge swings/bungee jumping g. Scuba diving e. Entomology f. Scientific research	• KTB • Private Sector • County Governments
Knowledge capturing	• Capture knowledge from people's minds into tangible, explicit knowledge assets. • Record experiences from all forms of tourism in Kenya in a format that can be stored, further processed, adapted, and shared within and outside the destination. Media formats will include video, images, and graphics. • Include interpretation at the visitor Centers • Integrate story telling into existing tourism experiences	• TRI • Academia • KTB • Private Sector • County Governments

Product Improvement and Diversification Recovery Strategy Implementation Matrix

Product packaging	• Development of a comprehensive tourism products and services database • Development of Packages or itineraries which will provide a one stop shop, at one, fairer all-inclusive price. • Create new experiences through packaging, to gives a competitive advantage through marketing or advertising The following are a range of products and services that can be linked in a package: – Food and beverage – Accommodation – Built attraction – museum, art gallery, theme park etc. – Natural attraction – waterfalls, scenic vistas etc. – Transportation – Programming – gourmet cooking, tea/coffee tasting, wood carving etc. – Guided tour – Entertainment – theatre performance, stage show, concert – Event/festival – Shopping – Activity – hiking, kayaking, alpine skiing, snowmobiling – Local culture	• KTB • Private Sector
2. Packaging tourism information and experiences		
Promotion of tourism products	• Link products to the right market type and segment • Promote the development of authentic Kenyan products • Collaboration to assist with bidding for international conferences and meetings • Employ targeted marketing to niche tourism segments such as targeted advertising and packages tailored to each niche segment	• KTB • Private Sector

Product Improvement and Diversification Recovery Strategy Implementation Matrix

3. Information provision and Geospatial presentation of Tourism resources in Kenya		
Information provision and Mapping of tourism resources in Kenya	• Determine the spatial quantity, capacity, quality, status and distribution of tourism attractions, amenities, activities, accessibilities and ancillary services around the country that will be accessible across the world • Conduct an inventory assessment of heritage assets and identify existing sites/products that require improvement • Develop a visitor information and interpretive strategy and policy (includes directional, information and interpretive signage). • Improve the extent and quality of visitor information provided for when in the reserve, e.g. improved visitor guides, additional and better-quality maps with suggested routes and travel times • Develop visitor centers at strategic locations to serve as activity hubs (with activity operators and guides), information centers and provide services to visitors (i.e. food and beverages, shopping such as crafts and basic provisions) • Develop and improve Apps that facilitate and provide comprehensive information across all modes of transportation nationwide. This will make trip bookings, journey planning and navigating around Country easier for free, independent travelers through the use of smartphone apps and other technologies. The App will give suggestions and navigate tourists to attraction sites at ease. • Employ technology in marketing tactics such as devising applications for marketing promotion as well as monitoring and analyzing post-travel reviews and feedbacks on online media, by setting up an entity/a department that will be responsible of all online interactions. • Resolve negative reviews and complement positive reviews, provide incentives for tourists to post reviews, such as discount for entrance fees/at souvenir shops, and conduct analysis and recommendations for the marketing team	• TRI • Academia • KTB • Private Sector
4. Information provision and Geospatial presentation of Tourism resources in Kenya		
Activities, attractions, amenities, accessibilities and ancillary services mapping	*Case of Activities mapping* 1. Compile a database of tourism-related activities taking place across Kenya 2. Classify activities by type and significance (i.e. international, regional, national, local and community) 3. Identify existing activities with potential to grow in significance and develop strategies to achieve growth 4. Improve the geographic spread of activities 5. Improve the spread of activities during the year 6. Create signature activities 7. Identify important activities codes that are already established in Kenya 8. Develop an activities policy (classification of activities, funding mechanisms, support that can be provided at national and county level etc.)	• TRI • Academia • KTB • Private Sector

Product Improvement and Diversification Recovery Strategy Implementation Matrix

5. Pricing revision for Tourism Products in Kenya		
Set the best prices for non-market commodities	Non-market commodities in tourism including nature/ environment - based resources such as parks / reserves, recreational spaces, and museums	• MoTW • TRI • Academia • Private Sector • County Governments
Recommend the best prices for commodities with market	Commodities with markets (such as hotel rooms, food / drinks, transport / communication) that can easily be derived through traditional business pricing methods.	• TRI • Academia • Private Sector
6. Identification and promotion of community-based tourism		
Promote community-based tourism	• Identify opportunities for community-based tourism to be developed and improved around wildlife, nature and scenic products • Promote engagement with host communities in development and management of community-based tourism or CBT such as agricultural tourism, horticulture tourism and homestay tourism. • Raise awareness of values and benefits of local heritage among the host communities such as promoting the benefits of tourism industry, training in communication skills, and educating them on how to benefit from their local attractions and cultures	• TRI • Academia • KTB • Private Sector
Adapt models such as the Albergo Diffuso	• Development of unutilized rural homes for tourism	• TRI • Academia • County Governments
7. Institutional structure		
Improve on the role of the National and County Governments in tourism management	• Encourage County governments to be more involved in developing tourism in their counties. • Clear identification of roles and responsibilities of the county Tourism departments and clearly define the scope of work and accountability of each entity. • Training of County representatives responsible for tourism. • Clear reporting mechanism should be designed to streamline the communication process between the National and the county governments by defining reporting lines and monitoring mechanisms including scope and occasion for intervention by national government and the procedure to address project derailment/implementation. • Include host communities for inclusivity in tourism development. Hold regular meetings between county governments and the communities to discuss issues related to tourism development. Online platform for ideas sharing can be explored.	• MoTW • County Governments

References

GoK. (2017). National Tourism Blueprint 2030. Nairobi: Ministry of Tourism and Wildlife.
GoK (2019). Tourism Sector Performance Report. http://ktb.go.ke/wp-content/uploads/2019/01/Tourism-Performance-2018-Presentation-Final2.pdf

