



Major initiatives and achievements of the tourism sector 2013 -2016

No	Item	2013	2016	Progress Achieved (Additional)	Social – Economic Impact
1.	INCREASE IN INTERNATIONAL ARRIVALS	2012: 1.8 Million	<ul style="list-style-type: none"> • 2013 - 1,526,112 • 2014 - 1,465,627 • 2015 - 1,183,847 • 2016 - 1,342,899 	<ul style="list-style-type: none"> • 13.4% increase in tourist arrivals (2016 compared to 2015) 	<ul style="list-style-type: none"> • Job creation • Increase in revenue for GOK through taxes
2	INCREASE IN DOMESTIC BED NIGHTS	2012-2.8 Million	<ul style="list-style-type: none"> • 2013 - 2.7 Million • 2014 - 2.9 Million • 2015 - 3.2 Million • 2016 - 3.5 Million 	<ul style="list-style-type: none"> • 11% increase in domestic bed nights occupancy (2016 compared to 2015) 	<ul style="list-style-type: none"> • Jobs creation • Greater cohesion and national pride due to movement within the country
3	INCREASE IN TOURISM REVENUES	2012 - 96.2 Billion	<ul style="list-style-type: none"> • 2013 - Kes. 94 Billion • 2014 - Kes. 87.1 Billion • 2015 - Kes. 84.6 Billion • 2016 - Kes. 99.7 Billion 	<ul style="list-style-type: none"> • 17.8% increase in tourism revenue (2016 compared to 2015) 	<ul style="list-style-type: none"> • Increase in foreign exchange
4	INCREASE IN YIELD PER TOURIST	USD 534	<ul style="list-style-type: none"> • 2013 - US\$ 714 • 2014 - US\$ 675 • 2015 - US\$ 730 	<ul style="list-style-type: none"> • Marketing efforts were focused on high yield 	<ul style="list-style-type: none"> • Growth of new high end brands due to

No	Item	2013	2016	Progress Achieved (Additional)	Social – Economic Impact
			<ul style="list-style-type: none"> 2016 - US\$ 750 	markets, hence the image of Kenya is seen as high end	demand e.g Radisson Blu, Kempiski English Point Marina
5	INCREASE IN NUMBER OF DAYS SPENT IN DESTINATION PER TOURIST	2012 - 13.2 days *KNBS	<ul style="list-style-type: none"> 2013 - 13.2 days 2014 - 12.9 days 2015 - 13.2 days 2016 - 13.2 days 	<ul style="list-style-type: none"> The number of days spent in Kenya have remained constant due to the value for money that is derived from the product offering 	<ul style="list-style-type: none"> We remain an attractive destination in spite of all the challenges experienced
6	INCREASE IN MARKET SHARE	<u>2012 Market Share:</u> Europe – 44% Asia – 11% Africa – 25% Americas – 14% Oceania – 2% Middle East – 4%	<u>2016 Market Share:</u> <ul style="list-style-type: none"> Europe – 35% Asia – 17% Africa – 29% Americas – 14% Oceania – 2% Middle East – 3% 	<ul style="list-style-type: none"> Focus on new regions such as GCC, South Africa, Nigeria, India, Turkey and East Africa. These have cushioned the destination against the volatility of the Europe market 	<ul style="list-style-type: none"> These new markets ensure that arrivals and revenue are sustained despite the decline in Europe
7	INCREASE IN BRAND AWARENESS	Awareness levels of destination Kenya globally as	<ul style="list-style-type: none"> Awareness levels of destination Kenya globally as at 2016 - 62% *KTB Research	<ul style="list-style-type: none"> Positive perception of the destination 	<ul style="list-style-type: none"> Increased foreign direct investments due to the positive

No	Item	2013	2016	Progress Achieved (Additional)	Social – Economic Impact
		at 2012 - 55% *CBI (Country Brand Index)			destination outlook • Increased propensity to travel to Kenya
8	STRATEGIC PARTNERSHIPS	None	<ul style="list-style-type: none"> Kenya Airways Kenya Wildlife Service 	<ul style="list-style-type: none"> Branding of KQ assets (aircrafts, seats and boarding passes) Joint marketing in Kenya, Africa and Asia Park fee waivers for KTB organised events/programs 	<ul style="list-style-type: none"> Increased destination brand visibility locally and internationally Increase in tourist arrivals
9	GOVERNMENT INCENTIVES TO PROMOTE TOURISM	None	<ul style="list-style-type: none"> Reduction in park fees Visa fee waiver for children under the age of 16 years 	<ul style="list-style-type: none"> Increased visitation to Kenya's parks and reserves by both local and international tourists Increase in tourist arrivals 	<ul style="list-style-type: none"> Increase in revenues for GOK through KWS
10	INCREASE IN COUNTIES INVOLVEMENT IN TOURISM MARKETING	Devolved government not in existence	<ul style="list-style-type: none"> KTB has developed a county engagement framework 	<ul style="list-style-type: none"> Product packaging and promotions with the counties 	<ul style="list-style-type: none"> Distribution of the tourism dollar Capacity building in the county
11	INCREASE IN CRUISE TOURISM	2012 - 1,057 arrivals	<ul style="list-style-type: none"> 2013 - 318 2014 - 362 2015 - 3,002 	<ul style="list-style-type: none"> Recovery of Kenya's cruise tourism business (increase in 	<ul style="list-style-type: none"> Trickledown effect to sectors such

No	Item	2013	2016	Progress Achieved (Additional)	Social – Economic Impact
			<ul style="list-style-type: none"> 2016 - 2,717 	<ul style="list-style-type: none"> cruise arrivals and cruises calling at Mombasa port) Repositioning Kenya and the Indian Ocean region as a cruise destination while working with the Cruise Indian Ocean Association (increased promotion of the destination and the new cruise terminal) 	<ul style="list-style-type: none"> as Agriculture, consumables/ FMCG sector, financials, construction, airline and motor vehicle industry
12	INCREASE IN INTERNATIONAL AWARDS WON BY KENYA AND SUB-DESTINATIONS	Awards specific to properties and less on destination or sub destination	<u>World Travel Awards (WTA) from 2013-2016:</u> <ol style="list-style-type: none"> 2013 – 2016: Africa’s Leading Tourism Board awarded to KTB Africa’s leading Game Reserve. Awarded to Maasai Mara Game Reserve. Africa’s leading beach Destination. Awarded to Diani Beach Africa’s leading Destination and 	<ul style="list-style-type: none"> Enhanced destination profile Enhanced country’s brand equity Enhanced Destination awareness Improved confidence on the destination 	<ul style="list-style-type: none"> Overall positive awareness on destination among the travellers, increasing propensity to travel to kenya

No	Item	2013	2016	Progress Achieved (Additional)	Social – Economic Impact
			<p>Africa’s Cruise Port 2016</p> <p>5. Africa’s leading meetings and conference destination, awarded to Nairobi</p> <p>6. Africa’s leading Destination awarded to Mombasa</p>		
13	INCREASED BUDGET/ INVESTMENT IN MARKETING THE DESTINATION	KShs. 889Million	<ul style="list-style-type: none"> • KShs. 1.215Billion 	<ul style="list-style-type: none"> • <u>Investment in innovative marketing initiatives as a result of increased funding:</u> <ul style="list-style-type: none"> - Sponsorship (Cricket in India, Sportpesa, Bollywood Film Producers Fam Trip, IAAF) - Refreshing of the Magical Kenya and KTB brand - Rolling out of global digital campaigns - Enhanced domestic campaigns - Global advertising campaign (BBC Africa and Al Jazeera) • Investment in new consumer segments such as 	<ul style="list-style-type: none"> • Growth in tourist arrivals by 10.3% (January - April 2016 compared to the same period in 2016)

No	Item	2013	2016	Progress Achieved (Additional)	Social – Economic Impact
				adventure seekers, families, high end tourists and MICE business <ul style="list-style-type: none"> Increased investment in Africa and domestic tourism as key regions of focus 	
14	GROWTH IN THE NUMBER OF CONFERENCES IN KENYA	11% of the arrivals	<ul style="list-style-type: none"> 16% of the arrivals 	<ul style="list-style-type: none"> Growth in the international conferences held in Kenya for instance; World Trade Organization Conference – 6,000 delegates Pre – Global Entrepreneurship Summit Exhibition – 9,500 delegates Africa Travel Association Congress – 2,500 delegates Kenya International and Investment Conference (KIICO)2015 – 6,000 delegates UNCTAD -5,000 Delegates TICAD – 8,000 Delegates 	<ul style="list-style-type: none"> Increased hotel bed occupancy, leading to higher revenue collection
15	LAUNCH AND IMPLEMENTATION OF THE CHARTER	None	<ul style="list-style-type: none"> The number of charter operators flying to Mombasa 	<ul style="list-style-type: none"> Enlisting of 5 additional charter operators' i.e. - Rainbow (PL) 	<ul style="list-style-type: none"> Stimulate arrival of

No	Item	2013	2016	Progress Achieved (Additional)	Social – Economic Impact
	INCENTIVES PROGRAM -CIP (Waiver of landing fees and USD 30 per passenger)		increased from 3 in 2012 to 6 in 2017	<ul style="list-style-type: none"> - TUI (PL) - Eden Viaggi (Italy) - ITAKA (Poland) - Meridiana (Italy) • Further enlisting into the program is expected from Travel Service (Czech Republic) and Blue Panorama (Italy) 	<ul style="list-style-type: none"> charter flights to Mombasa • Increase number of visitors to the Kenyan Coast • Promote stay of visitors at the Kenyan Coast • Potential of creating upwards of 33,000 jobs at Mombasa airport as well as boost job creation in the hospitality industry • Overall tourism recovery achievement.
16	JOINT MARKETING WITH THE PRIVATE SECTOR	Limited cooperation due to budget constraints	<ul style="list-style-type: none"> • KTB has participated jointly with the industry in over 25 exhibitions and roadshows across key markets such as 	<ul style="list-style-type: none"> • 13.4% increase in tourist arrivals (2016 compared to 2015) 	<ul style="list-style-type: none"> • Increased destination brand visibility locally and internationally

No	Item	2013	2016	Progress Achieved (Additional)	Social – Economic Impact
			Italy, Germany, France, UK, US, India, China, Australia, Africa, Japan, South Korea and Canada		<ul style="list-style-type: none"> <li data-bbox="1675 319 1881 423">• Increase in tourism revenue