

COUNTRY ANALYSIS

Kenya



STRENGTHS:

The common CBT products and services in Kenya include basic accommodation bandas, homestays, crafts & craft shops, cultural villages, indigenous community guiding services, campsites, forest tours and conservation projects.

Community-owned and managed bandas and cottages e.g. Karibuni eco-cottages and KEEP Bandas are mostly frequented by researchers, volunteers, backpackers, domestic travellers and philanthropists.

Cultural Villages: These are frequented by international tourists but mostly as stopovers en-route to destinations and marketing is mostly through tour drivers and referrals (word of mouth).

Art and craft: They are sold in craft shops in towns and along key tourism circuits. Sometimes they are hawked at park/attraction gates, in fairs and in camps/lodge/hotel curio shops. The market is often dynamic and attracts both local and international consumers.

Nature expeditions/excursions (forests, caves, historic sites, boat rides, etc.), e.g. Wasini Board Walk group, Mida Creek and Abindu caves. The consumers are mainly Students (local & international), researchers, international philanthropic organisations, conservation NGOs, and government departments.

Camps or lodges managed or owned in partnership with community: International tourists are the main consumers and are marketed through conventional tourism channels, such as tour operators, overseas agents, websites, brochures, social media and trade fairs.

Community guides (safari guides, forest guiding, bird watching, cave guiding, historic site guiding, etc.): The core customers are independent travellers, local tourists, NGOs and government departments on learning trips as well as adventure-seeking tourists.

Environmental conservation activities e.g. forest conservation, preservation of historic sites, species protection, conservation education programs: The consumers are students (local & international), researchers, international philanthropic organisations, conservation NGOs, government departments are also the main customers for these activities.



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WEAKNESSES:

Poor product packaging and lack of product diversification.

Weak product innovation characterised by product replication across destinations.

The absence of a legal framework to regulate and guide the sector.

Poor coordination and lack of synergy between the key sector players.

Financial and non-financial support from government agencies.

The supply driven nature of the sector. CBT often cannot compete with mainstream ventures, which are demand driven.

Overreliance on mainstream tourism resources such as beaches and wildlife.

Weak professionalism and limited knowledge on the dynamics of the tourism market.

Poor infrastructure around most CBT areas i.e poor road networks, lack of electricity connections, water and toilet facilities.

Lack of information of community-based tourism products and weak product marketing.



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OPPORTUNITIES:

Key opportunities that CBTs and sector stakeholders in Kenya can build on and exploit to enhance the stakes of CBTs include:

Unique products and services: There's need for niche alternative products such as homestays, agro-tourism, sports and cultural tourism, etc and stakeholders involved in CBTs need to capitalise on the growing demand for authentic and unique products to complement Kenya's conventional beach and safari product.

Information technology and communication: The growth of on-line booking systems as well as the wide access to and increased use of technology, especially the Internet and social media, is an opportunity for Kenya to highlight CBT products and reach a wider market audience, especially independent travellers.

Credible support organisation: CBT support bodies such as KECOBAT and EK can provide targeted technical support to CBTs and play a critical role in strengthening the capacities of CBTs and liaising with government authorities and development agencies as well as lobbying for supportive legislation.

Improved infrastructure: Increased investment in infrastructure development especially the road network to most tourist destinations by the government of Kenya has opened up access to CBT enterprises. Concurrent with this development, CBTs need to improve their products and facilities to capitalise on increased number of travellers.

Devolved governance: This is an opportunity for CBTs as every county strives to develop their own niche tourism products. By collaborating with county governments, CBT enterprises are in a position to access technical expertise as well as funding, which will enable them to improve and expand their operations.

Enabling environment: The government of Kenya through the ministry of tourism has put in place legal frameworks for the licensing, registration and regulation of tourism operators as well as institutions to regulate, strengthen and streamline the tourism sector. This provides an opportunity for CBT enterprises to comply and attain legal recognition, which will ensure they benefit from various programs and opportunities for product development, market access, and recognition.

Volunteering and partnership opportunities: Voluntourism is burgeoning, with more and more consumers keen on not only experiencing destinations but also supporting the development of host communities. Volunteers form a critical percentage of consumers of CBT products since they offer opportunities to work with host communities. To maximise on these opportunities, CBT enterprises in Kenya should ensure that they have in place functional volunteer and partnership frameworks and mechanisms for engagement.

Diverse publicity channels and networking platforms: There has been an increased global interest in sustainable tourism and this has spurred the emergence of publicity mediums, publications and networking forums focusing on sharing best practices on sustainable tourism, such as the Sustainable Tourism Report, the Green Tourism Summit, etc. CBT enterprises in Kenya can use these mediums and forums to not only engage with sector experts but also highlight their work and products.



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THREATS:

Product integration: The biggest challenge is getting tour operators to promote CBTs.

Product Development: There's no process for product development among CBTs. Most CBT products are not market driven rather they are influenced by observations of successful CBT ventures leading to product replication and subsequent lack of product diversification thus affecting demand.

Pricing: CBT products are extremely cheap despite unique experiences and authenticity of their products. This is attributed to the perception that CBT products are of poor quality.

Vulnerability of the environment, e.g. scattering waste, wetland degradation, destruction of environment and global climate change which poses a major threat to some tourism resources

Competition: Stiff competition from mainstream tourism resources.

Government bureaucracies, corruption and greed.

Political instability

High Population increase

Travel advisories.



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