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# Market Development Factors for American Travel to Kenya

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### **Abstract**

The Republic of Kenya gains growing popularity as a tourism destination which offers abundance tourism resources. However, to Americans who are the world's top spenders in outbound international travel, Kenya is still not a popular travel destination. It is obvious that there is a huge room for Kenya to attract more US travelers. This research explored the attractiveness of Kenya for US travelers and examined the US tour wholesalers' efforts on promoting the destination and their tour products.

An analysis toward the visual contents and the "key words" used by the US tour wholesalers in promoting Kenya, as well as a questionnaire, have been conducted to understand the ability of Kenya to attract American tourists. An overview of Kenya and its tourism system is provided to support the research findings preliminary. This paper also provided several recommendations to help attract more American tourists travel to Kenya.

## I. Overview

The Republic of Kenya, located in East Africa, is the regional hub of trade and finance. Kenya's capital city, Nairobi, is also considered as the culture, business, and transportation center of the entire East Africa. The official languages in Kenya are Kiswahili and English. By July 2009, the population in Kenya was almost 39 million, which ranks the 34<sup>th</sup> largest population in the world (CIA Factbook, 2009). There are around forty ethnic groups living in Kenya which make up almost 97% of the total population in the country. Amongst all these ethnic groups, the Kikuyu is the largest one which accounts for 22% of the total population (Country Profile: Kenya, 2007).

Historically, Kenya used to be the colony of Britain dated from the Berlin Conference of 1885 and attained independence from the United Kingdom on December 12, 1963. A year later, Kenya declared itself to be a republic country and Mzee Jomo Kenyatta became the first president of Kenya.

Geographically, Kenya is bordered with 5 countries, which are Tanzania, Ethiopia, Sudan, Uganda, and Somalia. The total area of Kenya is around 580,000 square kilometer, which is about twice of the size of Nevada State in the US (CIA Factbook, 2009). There are three major water bodies surrounded Kenya, which are Kenya's portion of Lake Victoria, Lake Turkana, and the Indian Ocean. For administrative purpose, the country has been divided into seven provinces and one area. They are province of Coast, Central, North Eastern, Eastern, Rift Valley, Nyanza, and Western, plus Nairobi Area.

Agriculture is considered to be the corner stone and the largest contributor for Kenyan economy. Tea, coffee, and horticulture are the three most important segments for the agriculture in Kenya, as well as foreign exchange earners. Especially, Kenya is the largest pyrethrum (which generate pyrethrum in the flower petal and can be extracted and used for pesticides) producing and exporting country and the fourth leading producer for tea in the world. Approximate 80% of the national population is employed by agriculture or direct related sectors, such as food processing. However, there are less than 20% of the land across of the country is suitable for cultivation. Among the limited amount of land, only about 12% is high potential agriculture land that is able to get adequate rainfall to support cultivation, while the rest of 8% with medium potential.

### **Tourism in Kenya**

Kenya can offer the travelers a vast variety of tourism resources that can hardly be found in any other country in the world. The abundance of tourist attractions creates a unique combination that includes wildlife, diverse landscape and plantation, tropical beaches, distinct local culture and ethnicity, as well as natural beauty.

### **Tourism Development**

The development of Kenya tourism can be traced back to as early as 1930's when it was still under the colony control of British. At that time, there are many foreign explorers and travelers came to Kenya for expedition related to big-game hunting. This is referred as "Safari" by Swahili people at that time and thus be widely used by public.

There were some very famous people visited Kenya around that time, such as Queen Elizabeth II, Ernest Hemingway, and Theodore Roosevelt. The tourism infrastructure construction was also started with the railway and road system construction administrated by British colonial government at that time.

Since Kenya has claimed independence in 1963, the government has recognized tourism as one of the most important economic sections for the country. Several governmental departments and organizations have been initiated to protect the tourism resources and boost the tourism development, such as Kenya Wildlife Services (KWS) and Kenya Association of Hotelkeepers & Caterers (KAHC). Kenya Government also implemented several plans to promote the development of tourism.

Due to the strong historical tie between Kenya and the British, a large number of European travelers travel to Kenya. Nowadays, the majority of the travelers arrived from Germany, as well as the United Kingdom, Italy, France, and the United States (Snapshot Africa – Kenya, 2007). Recently, the government also put a lot of efforts to publicize the Kenya tourism to Asian countries, such as Japan and China, in order to attract more visitors and diversify the target market.

### **Importance for Economy**

The tourism industry in Kenya has been growing continuously since the country claimed independence in 1963. Recent years, tourism has the highest growth rate, 13%, among all the economic sectors of Kenya. According to the data collected by Kenya Ministry of Tourism, tourism has exceeded manufacturing and becomes the second

largest economy contributor to Kenya. Tourism itself accounts for about 12% of Kenya's GDP. Along with tea and horticulture, tourism is one of the three largest foreign exchange earners for Kenya. What's more, tourism is a major source for Government Revenues, in forms of taxes, duties, license fees, and park entry fees, etc. (Kenya Ministry of Tourism, 2007). In addition, tourism also plays an important role in helping government increase employment rate, which accounts for over 9% of total wage employment throughout the country. There are about 0.4 million people hired in a formal job and over 0.6 million took informal jobs in tourism sector.

Besides the above direct influences, it is also impact the economy strategically. It has been adopted by the government as means of economy stimulus due to its "multiplier effect". It creates a positive impact on regional development, demand for local-produced goods and services, foreign investment in hospitality industry, and small enterprise development. Furthermore, it could lead to economic growth in order reduce the level of poverty, and improve the education and employment situation. Also, it could encourage people focus on environment and culture conservation and preservation of the environment.

## **Tourism Resources**

### **Attractions**

Regarded as the "Jewel of the East Africa ("Kenya", Feb. 2009)", it is hard to find any other country in the world that can provide the visitors as much to experience as

Kenya can. Here visitors are offered endless diverse choices, ranging from world-famous wildlife parks and reserves to the Indian Ocean beaches with 480km of coral reef, and from breathtaking natural beauty to rich cultural and historical sites. Among all the tourist attractions, the National Parks and Reserves and the Coast are the most popular.

### *National Parks and Reserves*

Currently, there are a total of 59 National Parks and Reserves in Kenya. These wildlife sanctuaries are the top reason why people come to Kenya. Not only games, but also birds, marine resources, local ethnicities, and distinct topography and vegetation are important composites for these National Parks and Reserves. They can offer the safari travelers a memorable experience in their life. Highly protected and controlled by the Kenya Wildlife Services (KWS) and the government, there are some differences between National Parks and National Reserves in Kenya to differentiate the focus of the protection. Generally, the National Reserves are very large in size and managed by the local authorities. Furthermore, the settling of the tribes is allowed, but other human settlement and inhabitation are prohibited around the area of National Parks.

**Masai Mara National Reserve** is considered as the best and the most popular wildlife parks in the entire Africa that attract millions of visitors to come to visit, as well as scientists. The images of Masai Mara can be found almost everywhere for advertising Kenya in the media. What's more, it has a significant impact on the tourism industry in Kenya, from the reputation, financial contribution, and diversity of tourism products, such as variety options of accommodations and transporting. Between July and October is the best time here that the zebra, wildebeest, and gazelle migrate from the Tanzania's

Serengeti National Park Game Reserve to Masai Mara. During this period of time, tons of visitors travel here to experience the unbelievable annual “Great Migration” personally.

**Amboseli National Park** is another popular destination for safari travelers, located near the border of Kenya and Tanzania. It provides a great view of Mount Kilimanjaro, the Africa’s highest mountain and the highest free-standing mountain in the world. Here visitors can personally experience an Africa’s typical image, just like what can be seen in the Hollywood movies: snow-capped peak, endless savannah, large herds of elephants, and various wildlife – giraffes, lions, cheetahs, buffalos, and hippos just name a few. There are over 50 of larger species of mammals and over 400 species of birds living on this only 392 square kilometer national park. Other than the large variety fauna and flora, Amboseli is also home of the well-known Maasai people communities, which is an indigenous semi-nomadic ethnic group. The visitors could have a chance to experience their well-preserved distinct age-old customs, dress, music, dance and language.

**Lake Nakuru National Park** is slightly different from most other National Parks. It provides the visitors the great natural scenery and experience all year round. Massive flocks of flamingoes standing around the lake, as a typical image of Africa always shown to the public, makes it the second popular National Park in Kenya after Masai Mara. Not only have the flamingoes made Lake Nakuru the “bird watcher’s paradise”, but also other over 400 species on or around lake area, such as pelicans, cormorants, avocets, stilts, etc. However, since early 1990’s, Lake Nakuru has been facing some serious environmental problems such as pollution and dramatically dropped lake level, which lead to mass die-

off of flamingos but not other birds or mammals. Although it has been recovered from this situation a lot, related researches are still undertaken.

The UNESCO World Heritage **Mount Kenya National Park** is the second largest mountain in Africa. It is famous for its great landscape, massive variety and distinctive vegetation, and beautiful scenery. The mountain can be divided into three principal zones: rocky peak which is glaciers and snow covered volcanic plug; alpine zone which features the distinctive vegetation; and gentle slopes which are covered by forest and bamboo jungle (GORP, n.d.). It is also seen as the realm of Ngai, local Kikuyu people's God. Kikuyu is the most populous ethnic group in Kenya. It is a tradition that they build their home face to the peak of Mount Kenya, or called Kirinyaga – place of light.

**Tsavo East National Park and West National Park** are originally together and called Tsavo National Park, when it first established in 1948. This was the second oldest National Park after Nairobi National Park and the largest park in Kenya, as well as one of the top ones in the world. However, due to the administrative purpose, it was divided in to East and West two National Parks. The Tsavo East National Park itself is still the largest National Park in Kenya. It is also a very popular National Park due to the easy accessibility and many visitors combine it with their beach vacation around the coast together, but less developed. Tsavo East is famous for the large number of elephants and huge herds of buffalos, as well as other wildlife. Compare to it neighbor, besides the wildlife, visitors can actually find a more varied topography at Tsavo West National Park, including rocky outcrops and ridges, recent volcano lava flows and ash cones, acacia woodlands, savannah bush, and Mzima Springs.

## *Kenya Beaches*

Beaches in Kenya are among the best in the world, so the visitors get a variety of choices related to the facilities, services, and water sports. According to the data from Kenya Ministry of Tourism, around 47% of tourism business in Kenya is generated from Kenya's Marine Parks and Reserves. What's more, among the total hotel beds in Kenya, there is almost 52% of them are at the coast area (Kenya Ministry of Tourism, 2007).

**Marine National Parks and Reserves** have abundance marine resources around the Indian Ocean, especially its coral-reef system and mangrove swamps. Over 140 species of corals, both hard and soft, are home to here. Here is also a great place for bird-watcher who wants to watch sea birds. Some popular parks are Malindi and Watamu Marine National Park, Kisite Marine Park and Mpunguti Reserve, Kiunga Marine National Reserve, Mombasa Marine National Park.

**Mombasa**, as the second largest city in Kenya, is considered as the centre of the tourism in coastal area in Kenya. Its history as a merchant trading port can be dated back to as early as 1500 years ago. Nowadays, The Port of Mombasa is still the major trading centre for Kenya. The major part of it is called Kilindini Harbor. This natural-gifted seaport is the only big international seaport in Kenya. It was the colony of Portuguese after the explorer, Vasco Da Gama, landed here in 1482.

The Old Town of Mombasa shows the heavy influence by Arabic culture, although built based on Swahili design models and features. **Fort Jesus**, **Mombasa Tusks**, and the East Africa's largest crocodile farm, **Mamba Village**, is renowned to the tourists.

Besides the historical tourist sites, the island city Mombasa offers the visitors an amazing beach holiday experience, which is the reason why Mombasa being one of the most popular tourism cities in Kenya. There are a lot of hotels, resorts, or lodges are built to accommodate the visitors in a variety of scales, costs, and themes.

**Nairobi** is the capital and the largest city of Kenya with over 3 million populations. Nowadays, Nairobi is a modern city with a lot of high-rise buildings and fancy leisure life, such as theaters, restaurants, shops and markets, bars, casinos, as well as horse race. The United Nations set one of the four major offices here, in Nairobi. Several museums (including **The National Museum of Kenya**), the Arboretum, and city markets are located in the city. Also, the Nairobi National Park is right outside of the city with great scene and a variety of wildlife. What's more, a little bit further to the city centre, there are waterfalls, Giraffe Centre, and Tana River for white river rafting offered to the visitors and adventurers.

In addition, **Kisumu**, the port city near Lake Victoria, and **Lamu** are also important to the tourism industry in Kenya.

### **Lodging Facilities**

Kenya, the top safari destination in the world, offers a variety of choices to the travelers regarding accommodation. There are luxury beach resorts, modern hotels in different scales, as well as incredible tree houses and camp tents. The majority of well developed lodging properties are located at major cities, such as Nairobi, Mombasa, and

Kisumu. In addition, there are a lot of special forms of lodging are built surround those famous national parks or reserves. Many international hotel companies also have properties in Kenya, such as Hilton, InterContinental, and Fairmont.

Some famous and unique accommodations include the **Norfolk Hotel**, which is the oldest and one of the finest hotels in Kenya, as well as a historical site with over 100 years history that has been the witness of Nairobi's development. **The Giraffe Manor**, a small personally hosted hotel with only six bedrooms, is on the 140 acres of forested land and home to herd of endangered Rothschild giraffes. The guests are able to feed and take picture with these well-known giraffes. **Wildebeest Camp** offers budget travelers and backpackers the only permanently tented camp along with a unique homelike experience. It is recommended by Hostelbookers.com as one of the "10 best cheapest hostels in the world". **Treetops Hotel**, first opened in 1932, is in the center of Aberdare National Park has 48 rooms and 2 suites supported by a wild fig tree and has tree grow right through the building. It is one of the most famous treehouse hotels due to one special guest – Queen Elizabeth II, who came as a princess and became the Queen the next morning after learning from her father King George VI's death

The coastal tourism centre Mombasa has been the popular Indian Ocean beach vacation destination dated back to colonial times. Many luxury hotels and resorts are built closed to the Mombasa beach just as you can find in other beach destinations. Inside or outside of almost every National Parks or Reserves, there are several lodges or camps provide services to the safari visitors. There are no typical hotels can be found around the national parks or reserves.

### **Restaurants and Other Supporting Facilities**

The foodservice in Kenya has not been well developed yet and it is not even an “industry” here. There are some good restaurants in the big cities, but the service is limited and many travelers may not get used to the taste. In the big cities, a variety of international cuisines are also available, such as Italian, French, Chinese, Japanese, Indian, and Arabic cuisines. Also, if the travelers want, they may have chances to taste the cuisine cooked by the meat of animals like crocodiles, zebras, or ostrich in some restaurants. **The Tamarind Dhow** is by far the most popular restaurant for tourists who come to Mombasa.

They are over 38 **golf courses** across of Kenya and many of them are in the championship quality. In addition, it is possible for the golfers to watch wildlife walk across the golf course.

### **Transportations**

As the transportation hub in East Africa, the public transportation system in Kenya is quite extensive compared to other countries in this region, or even the entire Africa. A lot of transportation facilities are developed during colonial times by British government and are still being used nowadays. Generally, traveling around in Kenya can be done by air, by rail, by road, or by water.

#### *Air*

According to CIA World Factbook 2009, there are total of 180 airports in Kenya, including 16 airports with paved runways and 164 unpaved (CIA Fact Book, 2009).

Currently, most of the airports are administrated by Kenya Airports Authority (KAA). Amongst all these airports, three of them are international airports, which are Jomo Kenyatta International Airport (NBO) in the capital city Nairobi, Moi International Airport in the port city Mombasa, and Eldoret International Airport (EDL). The price and availability of flight are very seasonal. During high season, far advance booking is preferred. The largest airline in Kenya and the sixth largest in Africa, Kenya Airways use “the Pride of Africa” as its company slogan. Its main hub is Jomo Kenyatta International Airport and focus city is Mombasa. Besides regular commercial flight services, charter air service and private jets have been another popular choice to fly into Kenya nowadays to meet the demand during high season.

There is no direct flight between the United States and Kenya. Originally, most American travelers need to make connections in European cities, such as London, Amsterdam, and Brussels, or other Africa countries like Senegal, Egypt, or Nigeria. Currently, Delta Airline, as the only American Airline company who provides service in Kenya, started new route between Atlanta, Georgia and Jomo Kenyatta International Airport (NBO) via Dakar, Senegal on June 2, 2009. This would provide some convenience for North American safari travelers and business travelers.

### *Railway*

By 2008, the total distance of rail in Kenya was 2778 km according to CIA Factbook 2009. The system was built primarily by British government during Victoria times when East Africa was under Britain’s colonial control. The system links its neighbor country Uganda with Kenya and, domestically, connects Kenya’s major cities and ports together.

Although it is very slow in speed and frequently gets delayed, it is still the safest way to travel in Kenya. Also, up to date, the rail in Kenya is mainly the narrow 1000-mm gauge, which is different from many neighboring countries, such as Sudan. A new high-speed electrified rail line is under construction in order to connect Kenya with Sudan and the technical problem the standard gauge will need to be overcome.

There are three classes on the train, first, second, and third class. In the most expensive First Class, it normally has luxury decoration and you are able to have own bed and get good service, as well as free drinking water. However, in the cheapest Third Class, passengers can only get the seats but not guaranteed. No matter what, it is a great choice if the travelers would like to spot game while on the way. Mombasa-Nairobi-Mombasa night train has been considered the best regular train in the entire Africa. It is well-maintained and great three-course dinners are provided.

### *Roads*

Generally, the road network in Kenya is better organized and structured than other East Africa countries. The majority of passenger and freight transportation is done by road transport (World Bank, 2006). By 2008, the national total of roads in Kenya is approximately 177,800 km, including paved and unpaved roads (CIA Factbook, 2009). National Roads are the main highways in the road network that link the important districts or cities within or outside the country.

The popular means of public transportation by road in Kenya are busses and matatus. Traveling by bus is one of the cheapest ways to travel around Kenya. There are

government owned and private bus companies run a variety of long-distance bus routes to the majority of the cities and towns across of the country, with regularly daily services available. Matatus refer to the minibus or vans “privately operated that stop anywhere to pick up or drop off passengers” and often times the inside and outside of the vehicles have been painted and decorated (Nantulya & Florence, 2001). It is estimated that currently more than 80 percent of passengers are transported by Matatus (Kimani, Kibua, and Masinde, 2004). However, recent years due to the lack of enforcement, the number of traffic accidents made by matatus has increased.

### *Waterways*

The public transportation by waterways in Kenya includes transporting on the sea and on Lake Victoria. Compared to other mode of transportation, it is not as extensive as others due to the limit of the geographical areas and services.

The world’s second largest freshwater lake, Lake Victoria, is located between Tanzania, Uganda, and Kenya. Kenya. The port city by Lake Victoria, Kisumu, is known as the third largest city in Kenya and a lot of freight vessels are in and out port every day. Currently there is no regular ferries carry passengers transport from kisumu to cities around the Lake Victoria.

For the public transportation in coastal area is better developed and better served the visitors. As mentioned in the former parts, there are regular ferry services between the North Coast and South Coast in Mombasa to carry the passengers back and forth every day. There are also Dhows to carry the passengers in a higher price. The Dhow cruise is

very popular for the travelers. Furthermore, many cruise ships often dock at the port in Mombasa, including the cruise ships of Holland America Line's Grand World Cruise and African Safari Club's MS Royal Star.

### **Hospitality Resources and Others**

As the authority that manages the Kenya as a tourism destination, Ministry of Tourism in Kenya has clearly recognized the importance of hospitality training for local tourism development. On the other hand, it has received the support from the Kenya Government in order to provide world quality services and standards to visitors.

#### *Training*

Now in Kenya there are many colleges and organizations provide training or education programs and facilities. One of the most recognized is Utaali College which was listed by World Tourism Organization in "World's 16 centers of professional excellence". It offers a wide variety of training and courses that covers almost all areas in hospitality, such as hotel management, catering services, and safari guiding. Due to the support by the government and the awareness of the importance of tourism for Kenya, Utaali College has continued increasing the number of students get trained.

#### *Ecotourism Kenya and its programs*

Founded in 1996, Ecotourism Kenya is a "civil society" organization aiming to promote the sustainable tourism practices in Kenya. It tries to bring the related companies, Kenyan people, and the community based organizations together to discover, educate, promote, and award the ecotourism practices. One of the most important parts

of its responsibility is its Community Outreach Program. This program tries to effectively involve people in local communities into the tourism in Kenya to promote the community-based tourism and to explore the ideas for this involvement. It supports the community mobilization by held the training sessions, seminars, and workshops, as well as the regularly newsletters.

### **Needs to attract foreign visitors (US)**

By 2007, the US was the 2<sup>nd</sup> largest source market for tourist arrival into Kenya (100,516 arrivals) after the UK (203,494 arrivals). However, the total number of US outbound overseas travelers, which not including travel to Canada and Mexico, was 31,288,000 in 2007. Kenya travel only accounts for around 0.32% of the total overseas travel for American, and at the same time there is around 3% of US travelers choose Africa as their overseas travel destination. In the same year, Kenya major tourism competitor, South Africa, attracted more than 219,000 travelers from America, which is doubled the number travel to Kenya. Comparing these numbers, it is easy to find out that Kenya is still not a very popular destination in Africa for Americans.

We realize that there are reasons from Kenya itself, its products, and from the tourist behaviors of Americans. Through the examination of each aspect in Kenya's tourism, we are able to identify the problems existing and the market potential, which will be analyzed in detail in Conclusion and Suggestions part of the paper. One thing could be

affirmed here is that there absolutely are a lot of rooms for Kenya to promote their tourism in the United States.

### **Tour wholesalers' role in the travel process**

The tour wholesalers, who are the “intermediaries” organizing and operating the tours, play an important role in tourism product distribution among all the tourism stakeholders, as they promote and distribute Kenya’s tourism products to US consumers. Their efforts can significantly influence the tourism industry, especially for a country like Kenya with less familiarity and accessibility for US visitors. It will provide us a direct view of current and prospective Kenya tourism products development in the US by assessing these perceptions and attitudes among Kenya tourism stakeholders.

## II. Research Overview

### Purposes and Objectives

The main purpose of this research is to explore the ability of Kenya, as a tourism destination, to attract American tourists.

This research has the following objectives:

- To understand the US tour wholesalers' attitudes to Kenya, perceptions about Kenya's market potential for US visitors, and feedback about the current situation of tours to Kenya.
- To discover how the US tour wholesalers represent Kenya in their company promotional materials and websites.
- Examine Kenya as a "Tourism System" to gain an overall understanding of the country and its tourism, and furthermore assess its potential as a tourism destination for US visitors.

### Methodologies

Besides the background study has finished in the first stage, which aims to support the following researches, the study has mainly used two research approaches. In the first instance, an analysis of the visual contents and the "key words" used by the tour wholesalers in the United State in promoting Kenya has been conducted. This was followed by a questionnaire to the key American tour wholesalers selling Kenya tour

products, regarding their impressions of Kenyan tourism in the United States. From these two approaches, we are able to understand the American tour wholesalers' effort in selling Kenya tour products in general.

## **Content Analysis**

### *Visual Appeals*

To understand the most important visual appeals in marketing Kenya to Americans, a content analysis has been conducted on the promotional materials from the tour wholesalers selling Kenya in the United States. The promotional materials studied were: 1). the printed brochures requested and mailed from 9 US tour wholesalers; and 2). the online brochures obtained from 5 other tour wholesalers' company websites.

These brochures were used to introduce or promote the 2009 tour products from the tour wholesalers. Some companies offer brochures specializing in African travel, however, the others may include the tour products to different continents in the same brochure.

The researcher has first identified several possible categories of images that could be found in the brochures, including wildlife, local culture, natural landscape, interaction between tourists and local people or animals, and possible accommodations and services. Next, the researcher reviewed the images used in the front covers and the sections introducing or related to Kenya in the brochures and recognized the categories the images

belong to. Through further analysis on the images perceived, some sub-categories were identified as follows.

**Figure 1: Categories and sub-categories of visual appeals**

Category	Wildlife	Local Culture	Natural Landscape	Tourists Interaction	Accommodation and services
Sub-category	“Big Five”	People in traditional dress		with wildlife	Lodges or camps
	Giraffe	Art works		with local people	Hotels
	Zebra			with fellow tourists	Services
	Cheetah				
	Wildebeest				
	Birds				
	Other				

### *Promotional Key Words*

Another content analysis was conducted on major tour wholesalers’ company websites, which are currently providing Kenya tour products to the US tourists, in order to understand the key themes on promoting Kenyan tours to Americans. The list of US tour wholesalers was obtained from the USTOA (United States Tour Operators Association) website.

To understand the key themes, a list of key words commonly appeared in the tour wholesalers’ websites was identified. Only the sections with text introducing or promoting Kenya tour products within the websites were analyzed, so 16 websites were included in this part of content analysis at the end.

The contents from the websites were put into documents in text format respectively to analyze the unique words. Each text documents were reviewed and modified by the researcher for the consistency of result, such as, “parks” was changed to “park”, “enjoyed” was changed to “enjoy”, etc. Furthermore, some mistakes appeared in the text was corrected. It is common that some tour operators made mistakes in the words “Masai” and “Maasai” that the first one is normally used in “Masai Mara” (the most popular national park); the later one is used for Maasai culture or people (the local culture). Later, the texts were inserted in to and read by the software program, CATPAC, using the frequency of 80 “unique” words. Many insignificant words would be used frequently, such as “a”, “the”, were filtered by the software to prevent them including in the results. A list of key words was also predicted based on the content analysis on images and the background research to check the discrepancy.

### **Questionnaire to Tour Wholesalers**

The product managers or destination specialists in charge of East Africa within the tour wholesalers company were the participants of this survey. These tour wholesalers are all registered members of the United States Tour Operators Association (USTOA) and currently selling Kenyan tours in the United States.

The questionnaire is designed to understand the following three issues from a tour wholesalers’ perspective:

1. The appeal to US consumers of African destinations;

2. The appeal to US consumers of Kenya;
3. The issues and challenges of selling Kenya tours to Americans from the aspects of consumer marketing and Kenyan travel suppliers

There was a total of 10 questions included in the questionnaire and covered each of the three perspectives. To get a better understanding of the important issues, some questions also had sub-questions in order to collect more in depth information from the participants.

The majority of the questions in the questionnaire are designed in Likert Scaling method that requires the participants give their responses in a scale of 1 to 5. Since the questionnaire was distributed through both telephone and emails, depending on participants' preferences, the scaling method could relatively increase the consistency of delivering of questions. Participants' unprompted responses were also recorded and included in the final analysis of the questionnaire.

### III. Research Results

According to the research objectives and methodologies stated in the previous section, the research results of the content analysis and questionnaire have been concluded as follows.

#### Content Analysis

##### *Visual Appeals*

Ten out of Fourteen of the tour wholesalers we have examined in this study offer their customers tour brochures specializing in Africa countries (some of them are combined with the Middle East), which includes printed brochures and online brochures. The majority of the brochures are designed very nicely and a lot of professional pictures were displayed to attract the potential tourists.

Among these ten brochures, nine of them presented wildlife images on their front cover. Images of lions and elephants are most popularly used.

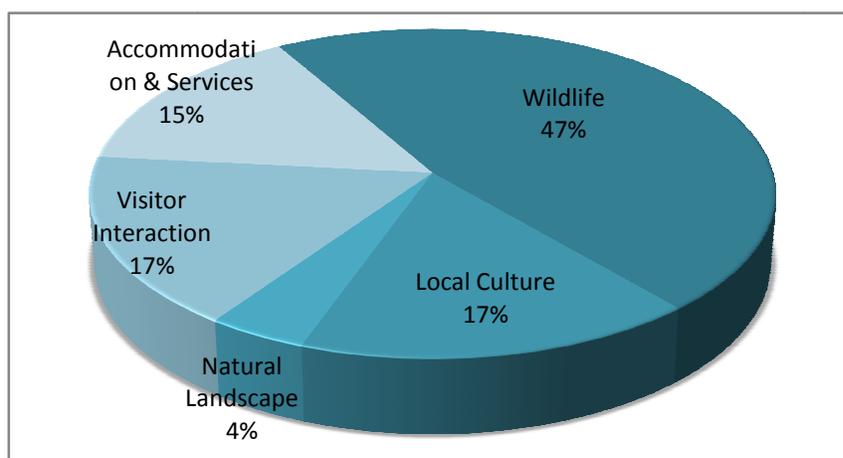
**Figure 2. Summary of wildlife images presented on the front cover**

Name of Wildlife	Times appeared on the front cover
Lion	4
Elephant	2
Cheetah	1
Giraffe	1
Zebra	1

(\*Noted: some brochures include more than one image in the front cover.)

Furthermore, the images of wildlife are also the most frequently presented on the pages or sections promoting Kenyan tours or tour products in the brochures. This is followed by images of local cultures, interaction between tourists and local people or animals, possible accommodation and services. The pictures of natural landscape were not frequently found in Kenya section of the brochures. The percentage of usage is shown in the pie chart (Chart 1).

**Chart 1: Percentage of each category of pictures used in the brochures**



Within the wildlife category, the images of “Big Five”, which include African elephants, lions, Cape Buffalos, leopards, and Black Rhinoceros, have been included in every brochure studied to promote Africa as well as Kenya. This made “Big Five” the most frequently shown images to represent Kenya, especially the pictures of elephants and lions. Besides “Big Five”, giraffes are also widely selected by many tour wholesalers to be included in the Kenyan brochures to attract tourists. In addition, the Big Cat Animals, such as lions, cheetahs, and leopards, are another group that has been popularly presented on the brochures.

**Figure 3. Number of times the images of each subcategory under Wildlife appear in the brochures**

Category	Wildlife	Times appeared in the brochures
Sub-category	“Big Five”	29
	Giraffe	14
	Zebra	6
	Cheetah	9
	Birds	4
	Wildebeest	6
	Other	6

Traditionally dressed Maasai people are the representative image for Kenyan local culture, which has been included in 86% of the brochures with a total of 19 images. Furthermore, the images of interaction between tourists and animals play an important role in the third most frequently used category – interaction between tourists and local people or animals with 15 images. The game viewing in a very close distance has been utilized by many tour wholesalers as a precious experience to attract tourists. As for tourists interact with local people, visiting in ethnicity villages and philanthropy activities are two popular settings. Activities and interactions with fellow tourists during the trip or at evenings have also been used by some travel wholesalers.

**Figure 4. Number of times the images of each subcategory under Interactions appear in the brochures**

Category	Tourists Interaction	Times appeared in the brochures
Sub-category	with wildlife	15
	with local people	8
	with fellow tourists	5

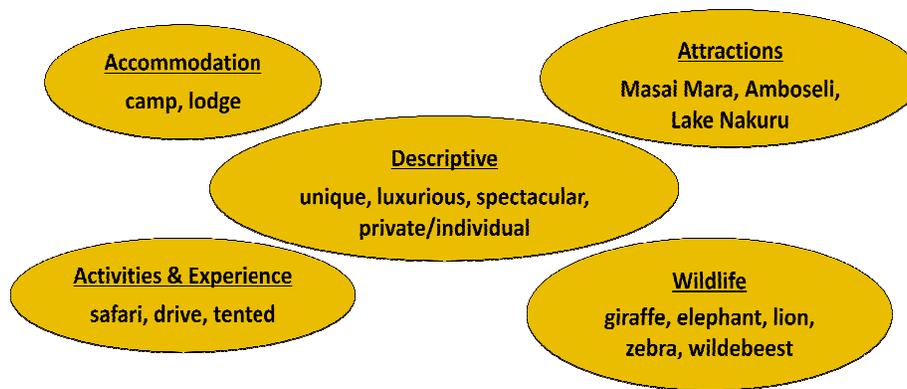
The major type of accommodations displayed in the Kenya sections is the tents or lodges around the national parks and reserves. Most of them are designed very luxury like what we can find in the movies. The amenities and facilities used are in traditional African styles and many of them are made by natural materials.

Lastly, there was only a total of 5 pictures display the natural landscapes in Kenya sections, which is far less than some other popular African destinations in the brochures like South Africa and Zimbabwe. Three out of these five pictures presented the savannah and the other two shown the Indian Ocean beaches in Kenya.

#### *Promotional Key Words*

After analyzing the result of “unique” words drawn from CATPAC program, the Top 5 key words used in marketing Kenya from the tour wholesalers’ websites are: Game (794 times), Masai Mara (424 times), safari (397 times), National Parks/National Reserves (356 times), and wildlife (303 times). Following key words have also been used in high frequency on promoting Kenya and match the word list the researcher identified prior running the program.

**Picture 1. Key words used in tour wholesalers' websites**



## Questionnaire

Based on the responses from the US tour wholesalers, seeing wildlife, visiting National Parks or Reserves, and safari experience are the top reasons Americans visiting Africa that all the participants gave the score 5 to these three items. This is also true for being the main appeals to Americans visiting Kenya. Visiting natural wonders and experiencing African culture receive average score of 3.8 and 3.4 respectively. Climbing Mount Kilimanjaro is considered the least important activity for appeals to Americans to Africa. In addition, two of the participants mentioned in the other appeals part that the philanthropy activities, such as visiting orphanage or local schools become more and more popular for American travelers going to Africa.

The participants also all agree that South Africa is the most popular tourism destination in the Sub-Saharan Africa area. They think South Africa, as the most developed country in Africa, has put a lot of efforts to promote their tourism in the

United States and its variety of tourism resources have been perceived by many Americans. What's more, they have better infrastructure and facilities to support the tourism development comparing to all other African countries.

However, for Kenya, only about 20% of Americans tourists included Kenya in their travel plans when planning their tours to Africa. Besides the top 3 appeals (seeing wildlife, visiting National Parks or Reserves, and safari experience), experiencing the local culture and participate in philanthropy activities were given the score 3.8 and 3.2 respectively. Although its capital Nairobi is the city that almost every visitor travel to Kenya would fly into, it was considered as the least important reason travel to Kenya for American leisure travelers. One of the most popular African beach destinations for Europeans, Mombasa, is also considered not important by the tour wholesalers to attract American tourists with a score of 1.2.

The majority of travelers choose to visit Kenya due to its abundant tourism resources, quality accommodations, as well as word-of-mouth from others. Recently, many tourists tend to add philanthropy activities into their trips to Kenya. However, the safety and security issues and long traveling time between the US and Kenya have been the main obstacles for Americans when deciding travel to Kenya. The culture barriers (include friendliness of local people) and poor transportation, facilities, and infrastructure, although, were not considered to be vital problems for Kenyan tourism, it could be nice to be improved in order to attract more US travelers.

The company websites and other channels like travel agencies are the major resources that travelers find out Kenya tour product information (received 5 as the score).

The brochures distributed and the travel magazines have also helped the tour wholesalers to let potential American customers find out their products (both received a score of 5). But since these US tour operators do not normally provide online booking services, the US travelers would most likely book their tours through travel agencies or the 800-service number (talking with the travel consultants from the tour wholesalers companies).

From the suppliers' aspects, the US tour wholesalers think Kenyan travel suppliers provided sufficient product information (average score was 4.4) and high quality of customer services (average score was 4.2). However, they do not think the Kenyan tour suppliers cooperated well enough with them in destination marketing to Americans, with the average score 2.8. Regarding the questions whether the Kenya travel suppliers provided enough training or enough supporting materials, the tour wholesalers gave out the score for 3.6 and 3.2 on average respectively.

### **Limitations**

Due to the limited number of tour wholesalers selling Kenya tours products in the United States, the sample size of this research is relatively small. This may lead to some degree of bias in the result of the research.

Furthermore, in the content analysis, the complexity of the websites and brochures from different tour wholesalers was not taken into consideration in the result. Some tour wholesalers' websites have been well established with a lot of useful information on the tour products and the destinations, whereas some websites are very simple that offer limited information to the customers. Furthermore, some of the brochures focus more on

introducing the destination using words instead of showing a lot of pictures. At the same time, some tour wholesalers only used a half to two pages introducing Kenya in their brochures, however, some others may use up to 27 pages introducing Kenya tours.

In addition, the content analysis is done by only one researcher. Some bias and errors might occur throughout the process.

#### IV. Conclusion

The result from the content analysis, toward visual appeals and the key promotional words, is matched with the result from the questionnaire. Overall, the image of Kenya as delivered by the US tour wholesalers is a tourism destination with abundant wildlife resources and distinct local culture and it is able to offer unique travel experience to American visitors. However, the US tour wholesalers do not perceive the Kenya local culture as attractive as the wildlife and safari experience are. Wildlife (or game) and National Parks or Reserves, as well as safari experience, are the most important appeals in both images and words considered by almost every US tour wholesalers. The majority of their efforts in promoting Kenya tour products have been related to these three components. Even though African culture is very distinctive from other cultures and it also has a strong tie with American history, it so far could not earn as much focus as animals do.

Animals are used most frequently when depicting Kenya compared to other Sub-Saharan African destinations, followed by local culture, especially the Maasai culture. Kenya's unique land features were displayed and mentioned much less than the similar type of features in the neighboring countries, i.e.: Victoria Fall in Zimbabwe and Cape Town in South Africa. For the visual appeals used in the brochures, it only serves as background to set off the wildlife primarily. For example, flamingoes fly around the lake; elephants are walking on the savannah with snow-capped mountain at the back. As for promotional key words, this is nearly ignored by the American tour wholesalers when promoting their Kenyan tour products on the website, unless when Mombasa beach is

mentioned. Actually, Mount Kenya and Lake Victoria, as well as the natural landscape resources within the National Parks are all very important and have great potential to be developed to bring in more visitors to Kenya.

Furthermore, the unique accommodation options (e.g.: camps, tents, or lodges) and the opportunities to closely interact with wildlife have been used by many US tour wholesalers as supplement to Kenyan tourism attractions in order to increase the attractiveness of their tours. A certain number of tourists in America do react positively to these additional features of the Kenya tours.

Lastly, Kenya do have a lot to offer to the visitors travel to Kenya, whereas, a lot of the tourism resources have not been fully discovered and utilized to promote the countries' tourism. Instead, many travelers in the United States may wrongly perceive that wildlife and National Parks or Reserves are the only reason attract them travel to Kenya. On one hand, this is due to the tour wholesalers put their efforts in those components primarily. On the other hand, as a whole, the country did not put enough effort to promote their tourism to Americans, in order to furthermore change the images delivered by tour wholesalers.

## V. Recommendations

Kenya has much more to offer to the travelers than the majority of American tourists have currently perceived. Besides the identified main attractions to Americans, the Indian Ocean Beach and marine resources, Mount Kenya, Lake Victoria, as well as the distinctive lodging facilities, also have great potential to attract US visitors. Moreover, a lot more efforts need to be made from each segment in the system. Following is a list of suggestions based on the research.

### *Destination Effort and Support*

The Kenyan Tourism system, including government and the non-government entities should put more effort and budget into promoting its tourism to Americans. According to the responses from the US tour wholesalers, most of them agree Kenya government and other related segments need to take what South Africa has done as reference. More effort and budget should be put into the US market like South Africa has done in order to generate higher US tourist arrival number and profit from the US travelers.

It is also necessary for the government to develop a plan in improving the infrastructure and transportation system. As mentioned in Tourism Resources section previously, many parts of the transportation system and infrastructure in the country was actually built during Kenya was still under British colonial control. Not only being very old, they have not been maintained or protected well for a long time. There is a need for the government to improve the infrastructure and transportation system, in order to meet

the requirements for foreign travelers, especially travelers from developed countries like the United States.

To improve the countries' image on national safety and security, as well as its political stability, could also be a consideration included when the Kenya tourism system tries to promote their tourism. Especially, Americans are very sensitive to these kinds of issues and tend not to travel to the countries seems not to be very safe. Even though Kenya is considered to be one of the most stable countries in East Africa, recent years several terrorism attacks have happened in its capital city Nairobi and most of them targeted the westerners as the objectives. What's more, during the end of 2007 and early 2008, a crisis erupted after President Mwai Kibaki won the presentational election. Soon after that, a lot of countries banned or warned the travel to Kenya, which brings the number of international traveler arrival down more than 33% in 2008 compared to the previous year. These cases could have negative influence to Kenya tourism in long run if the country could not work effectively to change the attitudes and impressions of travelers.

#### *Differentiating Kenya's Tourism Offering*

Based on the research, it appears that Kenya really needs to differentiate its tourism offering from other Sub-Saharan African destinations. Currently the major selling point for Kenya travel is game viewing and safari experience. However, they are overlapped with the offering from many other Sub-Saharan African countries, such as South Africa, Tanzania, and Botswana. All of these countries also market themselves as great game viewing destinations and offer safari experience. Although they do have differences in

the wildlife can be found in each country, it is seldom perceived by most American travelers. In addition, they all can offer unique culture experience to the travelers, as well as lodges and camps around the National Parks.

As a result, it is very important for Kenya to provide a Unique Selling Proposition (USP) to stimulate growth of the attention and the number of travelers to the destination. Furthermore, the Kenya tourism system needs to enhance the perception of customers and partners from other countries like tour wholesalers about the USP. Especially, it is necessary for them to tailor to the American tourists' behavior to develop the USP for American market. For example, incorporate more entertaining components into the tours; enhance the idea that Kenya is the "capital of safari" that where the word "safari" invented.

#### *Diversifying the Experience and Image*

Following the previous suggestion, the tour operators in the United States could diversify the images and experience offered to US tourists when promoting Kenya to Americans. Again take South Africa as an example, besides the vast wildlife resources and a number of National Parks, it also known for its natural beauty, such as Cape Town, and city experience to the visitors, as well as wine.

Although, Kenya owns relatively different tourism resources from South Africa, as the best developed country in Africa, South Africa also has a different variety of experiences offer to the travelers. It is important for tour wholesalers to recognize them and develop the tour products according to the different kinds of attractions and target

market. Instead of having it limited in wildlife and safari, more images about Maasai culture, Mombasa beach, Mount Kenya, and so on, could be used as local attractions to attract tourists. In addition, continuing on developing philanthropy activities as special life experience, adventure, Maasai culture exploration, and environmental conservation can also be considered as the added experience when travel to Kenya.

#### *Establishing direct flight between the US and Kenya*

The lack of direct flights between Kenya and the United States is a major obstacle that preventing Americans from traveling to Kenya. By far, the US travelers have to take connecting flights that stop in either European countries or some African countries in order to get to Kenya. Plus, there is only one US airline company operate flights to Kenya. Even for the best offer from Delta airline now, the travelers still have to stop in Dakar, Senegal for short period of time.

Among the main factors affecting American travelers' decision on airline, airfare and non-stop flights are the most important two considerations (ITA, Dec. 2009). Direct flights could not only shorten the travel time significantly, but also potentially lower the travel expenses for travelers.

#### *Broadening the target market*

Except for some tour operators specializing in educational tours, travelers under 40 are not normally targeted by most tour wholesalers in the United States as the customer group. Attracting more young people travel to Kenya could be an effective means of

increasing passengers from the United States and help Kenya earn more reputation and word-of-mouth.

Considering the cost to Kenya could be hardly affordable by many young people or students (without sponsorship from their families), the tours targeting this group could incorporate some volunteer experiences into it. The tours could focus on getting a taste of Kenya or safari and cover shorter time span. Also, the tour wholesalers could also consider work with the travel agencies like STA travel or Contiki that have strong background in online tour booking and targeting students and young professionals.

## Appendix 1. Sample Questionnaire

---

1. What are the main appeals of **African** travel for Americans? (Please rate the following appeals of African travel; 1 = not at all important, 3= neutral, 5 = very important)
  - a. Seeing African Wildlife – including the Big Five and other wildlife.
 

1	2	3	4	5
---	---	---	---	---
  - b. Seeing National Parks and Reserves, such as the Masai Mara and the Serengeti.
 

1	2	3	4	5
---	---	---	---	---
  - c. Life Experience:                      Experiencing a Safari
 

1	2	3	4	5
---	---	---	---	---
  - d. Life Experience:                      Climbing Kilimanjaro
 

1	2	3	4	5
---	---	---	---	---
  - e. Seeing African natural wonders, such as Victoria Fall, the desert, islands or beaches
 

1	2	3	4	5
---	---	---	---	---
  - f. Seeing African cultures, such as the Maasai, the Swahili, or the San Bushmen
 

1	2	3	4	5
---	---	---	---	---
  - g. Other appeals that were not listed above?  
\_\_\_\_\_
  
2. Which African (Sub-Saharan) country is the most popular for the American tourists?  
(Please write your response at the following spaces)                      Why?
  
3. What are the main appeals of travel to **Kenya** for Americans? (Please rate the following appeals of African travel; 1 = not at all important, 3= neutral, 5 = very important)
  - a. Seeing Wildlife in Kenya – including the Big Five and other wildlife
 

1	2	3	4	5
---	---	---	---	---
  - b. Seeing National Parks or Reserves, like Maasai Mara or Marine National Parks
 

1	2	3	4	5
---	---	---	---	---
  - c. Mombasa Beach vacations
 

1	2	3	4	5
---	---	---	---	---
  - d. Visiting the capital Nairobi
 

1	2	3	4	5
---	---	---	---	---
  - e. Seeing the native culture or ethnicity villages – the Maasai
 

1	2	3	4	5
---	---	---	---	---
  - f. Live experience:                      safari experience
 

1	2	3	4	5
---	---	---	---	---
  - g. Philanthropy activities
 

1	2	3	4	5
---	---	---	---	---

4. When planning a visit to Africa how frequently do consumers ask specifically to include Kenya in their vacation plans in terms of the **percentage**?
5. What are the main reasons that Kenya is included in travel plans for Africa?  
(Please response the following options in a scale of 1 to 5; 1 = not at all important, 3= neutral, 5 = very important)
- |    |   |   |   |   |   |   |
|----|---|---|---|---|---|---|
| a. | A lot to see and do   |   |   |   |   |   |
|    |   | 1 | 2 | 3 | 4 | 5 |
| b. | Location: in the centre of African continent that can be easily fitted into travel plan |   |   |   |   |   |
|    |   | 1 | 2 | 3 | 4 | 5 |
| c. | The condition and uniqueness of accommodation: camps, lodges, treetop hotel             |   |   |   |   |   |
|    |   | 1 | 2 | 3 | 4 | 5 |
| d. | Good transportation system that can easily transfer to or from other countries          |   |   |   |   |   |
|    |   | 1 | 2 | 3 | 4 | 5 |
| e. | The price   | 1 | 2 | 3 | 4 | 5 |
| f. | Word-of-mouth from family or friends  |   |   |   |   |   |
|    |   | 1 | 2 | 3 | 4 | 5 |
6. How do clients find out about your African program? (Please response the following options in a scale of 1 to 5; 1 = not at all important, 3= neutral, 5 = very important)
- |    |                                       |   |   |   |   |   |
|----|---------------------------------------|---|---|---|---|---|
| a. | Advertisings on the Mass Media        | 1 | 2 | 3 | 4 | 5 |
| b. | Travel Magazines                      | 1 | 2 | 3 | 4 | 5 |
| c. | TV travel channel                     | 1 | 2 | 3 | 4 | 5 |
| d. | Company Website                       | 1 | 2 | 3 | 4 | 5 |
| e. | Brochures                             | 1 | 2 | 3 | 4 | 5 |
| f. | Other distribution channels/ partners | 1 | 2 | 3 | 4 | 5 |
7. How do they book the trip? (Please response the following options in a scale of 1 to 5; 1 = not at all important, 3= neutral, 5 = very important)
- |    |                              |   |   |   |   |   |
|----|------------------------------|---|---|---|---|---|
| a. | Company Website              | 1 | 2 | 3 | 4 | 5 |
| b. | Telephone/800-service number | 1 | 2 | 3 | 4 | 5 |
| c. | Onsite                       | 1 | 2 | 3 | 4 | 5 |
| d. | through other channels       | 1 | 2 | 3 | 4 | 5 |
8. How would you describe the tourists in most of your tour group to Kenya? (Please fill the following blanks)
- |    |                           |       |
|----|---------------------------|-------|
| a. | Age group:                | _____ |
| b. | Professions/occupation:   | _____ |
| c. | Average Household income: | _____ |

9. What are the potential problems/challenges you may encounter when selling **Kenyan tours**, compare to other African tourism destinations? (Please rate the following problems/challenges; 1 = not at all important, 3= neutral, 5 = very important)

a.	Safety and Security consideration	1	2	3	4	5
b.	Length of travel - no direct flight	1	2	3	4	5
c.	Support from the local government	1	2	3	4	5
d.	Poor facilities/infrastructure	1	2	3	4	5
e.	Cost	1	2	3	4	5
f.	Culture barrier/friendliness of local people	1	2	3	4	5

Other \_\_\_\_\_

10. Challenges in working with Kenyan travel suppliers. (Please respond the following series of questions in a scale of 1 to 5 as indicated following the questions)

i.	Do they provide sufficient product information?						
	Not satisfied	1	2	3	4	5	satisfied
ii.	Do they provide necessary training?						
	Not satisfied	1	2	3	4	5	satisfied
iii.	Are they cooperative in the marketing of the destination?						
	Not satisfied	1	2	3	4	5	satisfied
iv.	Do they provide enough support materials?						
	Not satisfied	1	2	3	4	5	satisfied
v.	How's their customer service?						
	Very bad	1	2	3	4	5	Very good

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