LAIKIPIA COUNTY SUSTAINABLE TOURISM MASTER PLAN

NOT FINAL

PENDING

Laikipia County Endorsement.

Prepared by the Laikipia Tourism Task Force

with support from the Laikipia Wildlife Forum
EXECUTIVE SUMMARY

This document outlines a 10-Year ‘Master Plan’ for tourism development in Laikipia County. It details strategic commitments from the Laikipia County Government (the “County Government”) in support of Laikipia’s sustainable tourism sector over the period 2015 to 2025. This Plan has been developed by the Laikipia County Government’s ‘Tourism Task Force’ in pursuance of the Laikipia Tourism Bill and contributions to the Laikipia County Integrated Development Plan. The development process has involved extensive consultation with tourism stakeholders throughout Laikipia during the period 2013 to 2015.

The County Government acknowledges the support of the Laikipia Wildlife Forum (“LWF”), which has contributed significant financial and technical support to the development of this Master Plan. This document refers to and builds upon the ‘Laikipia Tourism Strategy’ produced by Dr. Chris Thouless in 2007 on behalf of LWF.

This ‘Master Plan’ has been developed around a series of sequential steps – each creating the premise for the next. The process ensures that all strategic commitments are based upon a structured analysis of the relevant market trends and all key issues affecting Laikipia’s tourism sector. This Master Plan:

- Assesses Global Tourism trends which are relevant to Laikipia
- Determines tourism trends within East Africa and related economic impact
- Analyses the performance of Kenya’s tourism sector over the past 5 years
- Articulates the Core Attributes which underpin Laikipia’s tourism sector
- Describes Laikipia’s Current Tourism Offering, and highlight those which have harnessed these various attributes
- Summarises the Views of Laikipia Tourism Stakeholders
- Identifies Future Tourism Product Development Opportunities
- Summarises Enabling Initiatives for coordination by County Government and partners
- Details necessary Training & Capacity Building requirements
- Explores ways in which Laikipia can establish leadership in Sustainable Tourism
- Shares best practice in Community Tourism Partnership approaches
- Outline a Marketing & Branding Strategy for Laikipia
- Recommends Investment & Financing activities in support of Laikipia tourism
- Proposes Implementation Actions to be refined through stakeholder consultation
During the last major analysis carried out on the wildlife tourism sector of Laikipia County (in 2012)\(^1\) it was shown that nature/wildlife tourism generated an estimated USD$20 million (Ksh 1.7 billion) of revenue per annum, employing over 1,300 people with USD$ 3 million (Ksh 249 million) in wage earnings. Wildlife tourism also provides further revenues estimated at USD$ 1.9 million (Ksh 162 million) for local goods and services providers in Laikipia.

The urban tourism sector in population centres such as Nanyuki and Nyahururu is also understood to contribute significant additional revenues and Laikipia’s tourism sector now constitutes a central component of the County’s growing economy. However, Laikipia’s tourism sector is facing a very challenging period at the time of development of this Master Plan in 2015 – a consequence of the security situation arising from Kenya’s involvement in a conflict in neighbouring Somalia, the onset of drought-like conditions over the last two years, and the incursion of cattle and arms from neighbouring counties.

The Kenyan tourism industry as a whole has endured an estimated 30-50% downturn in revenues when compared with the most recent buoyant period for tourism in 2011. As such, while it is important to preserve the creative products and values which have underpinned Laikipia’s tourism successes to date, it is also necessary to explore new source markets, products and tourism development approaches which will enable Laikipia’s tourism sector to adapt to these difficult times.

This Master Plan looks to the long term and considers ways in which Laikipia can set itself apart through leadership in sustainable tourism, through a strong domestic market focus, and by developing innovative community, private sector and wildlife conservation focused partnerships.

Tourism is the second biggest sector in Laikipia after agriculture. Its future is as much a part of the County Vision for “a peaceful and prosperous model county”, as it is a tool for sustained economic growth, environmental management, and land use with social and cultural benefits.

This Sustainable Tourism Master Plan is a result of three+ years of investment by the Board of Directors of the Laikipia Wildlife Forum (LWF) in the future of tourism for Laikipia. The Plan’s basic architecture is a result of the efforts of an international tourism consultant, Neil Birnie, of Conservation Capital. He followed a terms of reference issued by the Board in 2014. The Consultancy was funded by the Embassy of the Kingdom of the Netherlands.

This final plan is a result of a special Task Force formed by LWF to bring the Master Plan forward into the light of recent tourism challenges and developments in Kenya. It also reflects the collective inputs of tourism practitioners from the private sector and Laikipia County Government, led by LWF.

As a result, the Plan is much more broadly focused on a sustainable tourism agenda for Laikipia region, and not just an ecotourism/wildlife tourism strategy as originally envisaged. It also reflects much stronger links with Laikipia County legislation and newly devolved functions of the Government for tourism.

This final version reflects the inputs of the Task Force. The Task Force included Alison Allport, John Elias, Ndewa Gitonga, Jane Puntunoi, Peter Hetz, Wangari Wachira, and Neil Birnie, Josiah Thiruku, and Ekwam Nabos. All gave of their time voluntarily.

This version of the Master Plan has been accessible on the LWF Website under Resources/Downloads for a year. Its major release was awaiting passage of the Laikipia County Sustainable Tourism Bill. This Bill still awaits a final reading and approval by the Laikipia County Assembly. At present, the County has turned its attention away from the Bill without explanation.

In an effort to advance the formation of a Laikipia County Tourism Association, and to better inform the selection of political leadership and choices for County development in 2017 and going forward, we release this document again.

This document will advance the formation of a Laikipia Tourism Association. The Sustainable Tourism Bill calls for an Association to be formed to interact with County Government.
The Bill calls for the County Government to form an interdisciplinary County Council on Tourism, so that County departments are coordinated on the investments needed in Laikipia. The two together – The Council and the Association form a public-private partnership called the Laikipia Tourism Board.

This Board would be the overarching instrument directing sustainable tourism development and investments in the County.
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PART 1: LAIKIPIA TOURISM CONTEXT – INHERENT ATTRIBUTES

1.1 Inherent Attributes

This Part considers the inherent attributes of Laikipia as a tourism destination, i.e. those attributes which are largely beyond the control of the private sector alone to influence, but which form the ‘assets’ with which Laikipia’s tourism businesses have to work, and the ‘environment’ within which they must operate.

1.1.1 Product Context

This Part considers the basic components of Laikipia’s tourism product. Understanding and rationalising these features is important in order to then ensure that subsequent County Government policy development protects and enhances them:

a) The nature and quality of the physical features in Laikipia (mountains, rivers, views etc.)
b) The natural environment of Laikipia (wildlife numbers and visibility, charismatic species, forests etc.).
c) The cultural attributes of Laikipia (its tribal peoples, culture of hospitality etc.)

Laikipia’s physical features include its expansive views, stretching across a vast and wild plateau to the north and west from Nanyuki. Snow-capped Mount Kenya is a core element of the Laikipia experience, visible from most parts of the region on a clear day. Laikipia also boasts spectacular views into the Great Rift Valley and from the magnificent escarpments which descend into the wilds of northern Kenya. The river systems of the Ewaso Nyiro and Ewaso Narok are a core physical feature, providing excellent tourism product potential. Although largely outwith the administrative boundaries of Laikipia County, the forests of Mount Kenya can (and should) play an important role in Laikipia’s tourism.

Laikipia’s natural environment includes some of the most important areas for biodiversity in Kenya, with rising or stable wildlife numbers, in contrast to a declining trend throughout much of the country. Wildlife population densities in the Laikipia region now rank second to the internationally renowned Maasai Mara ecosystem, whilst the diversity of large mammals is higher than in any other part of Kenya. The Ewaso ecosystem is home to the second largest population of elephant in Kenya (>6,000) and Laikipia hosts the highest populations of endangered species, such as black rhino (half of Kenya’s total population), Grevy’s zebra (70% of the world’s population), reticulated giraffe, and the only viable population of Lelwel
hartebeest in the country, as well as Africa’s only expanding population of wild dog. Endangered species represent an opportunity to differentiate Laikipia as a tourism destination. Tourism products can be tailored to incorporate understanding and protection of these species with regard for wider land use practices.

In terms of cultural attributes, Laikipia is home to ethnically diverse communities, including the Mukogodo Maasai, Kikuyu, and Meru, who live side by side with Europeans, Turkana, Samburu and Pokot. Cattle-rearing on large commercial ranches and community owned rangelands has for many years been the life-blood of the community. As so much of Laikipia has traditionally been used for low intensity grazing it has become a haven for wildlife and yet remarkably Laikipia is not a formally protected area. Laikipia’s wildlife is entirely sustained by private and communal landowners and this genuine working environment is a very unique cultural attribute in tourism terms, whereby visitors can engage not only with their guides and hosts but also with local cattle herding peoples or ranch managers, who are working together for a sustainable future for Laikipia. The rapidly growing town of Nanyuki also represents an appealing destination in itself, particularly for business and conference tourism and for stopovers en route to natural/cultural areas for leisure tourists.

1.1.2 Landscape Management

Tourism should serve as a tool for wider landscape management in Laikipia. Sustainable tourism is one of the key economic drivers in the County – the others being livestock, horticulture and floriculture. Over the next decade tourism will have particular relevance for mixed land use ranching, whereby tourism infrastructure and activities should complement other land uses. A ‘unity of purpose’ is required among landowners in order to shape the landscape in a way that maximises sustainable economic returns.

Laikipia can also serve as a driver and ‘economic hub’ for tourism development in neighbouring counties – particularly in northern Kenya. Landscape level tourism linkages should be formed in order to ensure that infrastructure development in these counties ties in with wider rangeland management, wildlife conservation and all relevant economic land uses. Tourism marketing, development and management will be particularly challenged in the face of climate change. More pressure will build on the highland areas where grass and water, in particular, are going to become more valuable resources to people from outside the

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2 Laikipia Conservation Strategy, prepared for LWF by Graham et al
County, adding often undesirable impacts to tourism which requires access to natural landscape and wildlife tourism.

1.1.3 POLICY ENVIRONMENT

Tourism is generally planned for at a national level, however as evidenced by this Master Plan this is moving increasingly towards aspects of County level responsibility. As noted above, whilst policies have been developed at national level, they have focused primarily upon the administrative functions of national government that relate to the tourism sector and efforts have not yet focused upon incentivising the key recommendations within Vision 2030, for example relating to ‘ecotourism’ and within this ‘cultural tourism’. The County Government has noted that a key priority will to work out the relationship between National and County Governments and within this building the technical capacity of the County Government to comprehensively and proactively oversee the development of impactful tourism policies (see Part 9 below).

1.1.4 REGULATORY / COMPLIANCE ENVIRONMENT

Under the Laikipia Tourism Bill and relevant supporting regulations, the County Government has the mandate to create a regulatory and compliance system for tourism in Laikipia. The County Government recognises that the regulatory environment must not be too heavy (as this could restrict the development of high potential tourism enterprises) but also that it should not be too weak (as this can encourage low quality operators and related negative competition). The County Government is committed to incentivising and supporting Laikipia’s tourism sector and specific strategic commitments for regulatory development are summarised in Part 9 below.

1.1.5 FISCAL ENVIRONMENT

Favourable comparison with neighbouring countries is essential when considering how best to attract both domestic and foreign investment. Kenya offers a taxation environment based upon a standard corporation tax rate of 30% with a minimal capital gains tax regime on significant business assets such as property. As a result, foreign investment in Kenya’s tourism sector has historically been relatively strong. However even more incentives will be required to sustain investment given the wider security context, which is causing many investors to look at opportunities outside Kenya at present. Stakeholder consultation (see Part 7) has revealed concern regarding the apparently confusing system of taxation and licensing at both national and county level. The County Government is committed to resolving this as further explained in Part 9.
1.1.6 Property Rights

In order to stimulate the tourism sector, there should be a system of property rights which ensure maximum security of investment in tourism infrastructure and related operations. The Laikipia Conservation Tourism Strategy, recently prepared on behalf of LWF for the purpose of informing the County Government, explains that land in Laikipia is held under a mixture of private, communal and government ownership.

Large-scale privately owned ranches account for approximately 39% of Laikipia. Sub-divided ranches intended for smallholder settlement, under varying degrees of occupancy, cover 34% of Laikipia County. Eleven communally owned group ranches in north Laikipia cover 7% of the County. A large area of Laikipia is under government ownership, including national forest reserves, large-scale government ranches, veterinary outspans, and land that has been bought by the government settlement trust fund and swamps. The remaining parts of Laikipia are urban areas.

This broad range of property rights presents strong opportunities for tourism development, potentially leveraging a mix of private, communal and government owned land across a suite of appropriate tourism products. Within community and government owned land contexts, the County Government will give consideration to the possibility of long leases which provide for a suitable timescale for investors to make a commercial return from any new infrastructure created. An implementation action in pursuance of this Master Plan will be to establish the legal basis upon which appropriate rights can be granted to tourism investors.

1.1.7 Seasonality

Tourism development in Laikipia has historically been influenced by seasonality, however as weather patterns increasingly vary, the predominant rainy seasons of April/May and November are less certain. As such, most tourism businesses will seek to remain open throughout the year if the source markets understand that visiting Laikipia is possible all year round.

1.1.8 Security

The general perception – and realities – of security in Kenya represent the single biggest obstacle to tourism development in Laikipia in the coming years. In order for the tourism sector to grow significantly in Laikipia, the security situation must improve – or at the very least be better understood by the key international markets.
This issue will require to be proactively addressed by the national government and all Counties working together to ensure that the security of tourists is safeguarded in key tourism locations. Laikipia must also work hard to promote its brand as a distinct destination within Kenya (see Part 13).

1.1.9 Logistics
The logistics of tourism business operations in Laikipia are not necessarily any more complex than other regions of Kenya, however they are nevertheless often difficult and expensive. The road infrastructure (especially in remoter areas) is relatively poor, however this lack of infrastructure (in particular the lack of tarred roads) also contributes to Laikipia’s appeal as a ‘wilderness’ destination. Improvements in the frequency of scheduled air services which cater specifically for the tourism sector would help matters – although once again these are relatively good when compared with other parts of Kenya and certainly with other African countries.

1.1.10 Access to Health Services
Good access to health services is a crucial element of tourism development. At the moment, Laikipia is reasonably well served within a rural African context and the Nanyuki Cottage hospital has an excellent reputation for handling minor (and indeed more major) injuries to tourists. However, thereafter the system of air evacuation to Nairobi is necessary and in the medium to long term the tourism sector will require significantly larger and improved health services in the County.

1.1.11 Conservation Management
A key element of tourism development in Laikipia is the strength of conservation management across the County. In Laikipia the private ranches are particularly well managed in general terms for wildlife purposes, and the relationship between tourism and conservation is addressed in detail in Part 11 below.
Not surprisingly, the overview illustrates that the natural attributes of Laikipia represent the core strengths of the tourism sector. However, it will only be possible to capitalise upon
these natural assets if a strong and well-managed system of conservation is sustained. An example of the need to balance the needs of the tourism industry and other sectors in national and County level government planning are the proposals for a power line cutting through central Laikipia and for a dam on the Ewaso Nyiro river.

Both will have a significant negative impact upon Laikipia’s tourism sector in years to come and more integrated planning would have perhaps resulted in alternative routings or locations for such developments.

*Security presents the major challenge for the present and future of Laikipia’s tourism sector* and addressing this is something which the County Government is committed to focusing upon, to the maximum extent possible. More detailed strategic commitments relating to the role of the County Government in managing and supporting the core attributes of Laikipia’s tourism sector are addressed in Part 9 below.
PART 2: LAIKIPIA TOURISM CONTEXT - DEVELOPED ATTRIBUTES

This Part focuses upon those developed attributes of Laikipia’s tourism industry which have been primarily shaped by the efforts of private sector tourism businesses.

2.1 Tourism Development Pre-2008

In the late 1970s, there was only a single tourism lodge in Laikipia (on Colcheccio Ranch). There are now over 40 nature-focused tourism operations in rural Laikipia, with many more urban facilities in population centres such as Nanyuki and Nyahururu, with over 30 of these having been developed in the period prior to 2008. Between 2000 and 2007, there was a 104% increase in the number of tourism bed nights in Laikipia\(^3\), much of which can be attributed to successful collaborative tourism marketing and product efforts in which the LWF was centrally involved.

The 2007 Laikipia Tourism Strategy prepared by Dr Chris Thouless on behalf of the LWF included an inventory of wildlife-focused tourism facilities in Laikipia at that time. This is valuable to analyse because at that point, Laikipia’s tourism was on a strong upward trajectory (prior to the 2008 election violence), and the character and pricing of the products on offer in 2007 enables better understanding of the potential opportunities and target markets which the private sector felt lay ahead. The 2007 Strategy described the tourism products available at that time as follows:

**Low Impact:** While sizes ranged from a low of just 3 beds to a high of 230 beds, the typical facility in Laikipia had just 13 beds. There were 5 facilities with more than 30 beds and 24 facilities with fewer than 30 beds.

**High Value:** While per person per night rates varied from US$25 to US$425, the typical rate in Laikipia was US$325. 18% of facilities charged under US$100 pppn; 28% between US$100- US$299 and 54% over US$300. Average earnings to the operator per available bed were on average 11% higher than the national average.

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\(^3\) Laikipia Conservation Strategy, prepared for LWF by Graham et al
**High Creativity:** Collectively, Laikipia’s tourism operations offered 56 different wilderness based activities – many more than were on offer anywhere else in Kenya. Most facilities still depended on game drives as the main activity, but unlike in National Parks, where game drives were almost the only permitted activity, other activities were becoming increasingly popular and important in Laikipia. These included Cultural visits, Bird watching, Swimming, Walking, Camel rides, Sundowners, Camel safaris, Bush Dinners, Wildlife research activities, Night game drives, Fly camping, Climbing, Botany, Ranch tours, Horse riding, Fishing, Tennis, School visits and Helicopter Excursions.

**Strong Promotion:** Many of the facilities regularly featured in top international travel and architectural publications (a recognition of the inspiring designs used in many facilities).

**Owner operated:** Many facilities were owner operated, with 60% of the region’s tourism operations controlled by Kenyan citizens. Laikipia’s tourism businesses enjoyed a high level of return visits.

**Industry Awareness:** A survey carried out by the LWF at that time on the perceptions of Laikipia held by local and international tour operators concluded that 68% of all operators surveyed believed that it was very important to have Laikipia on an itinerary of Kenya. Moreover, in terms of the future, 82% believed that having Laikipia on an itinerary was becoming ever more important.

### 2.2 Tourism Development Post-2008

The post-election violence in 2008 resulted in an extreme downturn in tourism in Laikipia, as with the rest of the country. However, remarkably, by as early as September of 2008 visitor numbers in Laikipia were reported by operators to have returned to pre-election violence levels.

This is borne out by the evidence of leading UK web portal and tour operator, Responsibletravel.com⁴ which maintains an in-depth booking analysis system, tracking all of the countries which feature on its website. The business handles over 400,000 travellers each year and Kenya has historically been one of their most popular destinations. When interviewed for the purposes of developing this Master Plan, the managing director explained that Kenya has shown incredible resilience in recovering from significant ‘shocks’

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⁴ Responsibletravel.com is the world’s leading portal for responsible/sustainable tourism: www.responsibletravel.com
when compared with other destinations. Following both the 2008 election violence and the kidnapping of tourists from Kiwayu and Manda islands in 2010, Kenya took only 9 months to recover to pre-shock booking levels.

The frequency of more recent terror events, including large attacks in Westgate in late 2013 and the Garissa attack in 2015 (with several smaller attacks in northern Kenya and on the coast in between) has weakened Kenya’s destination appeal considerably. The same Responsibletravel.com booking analysis system shows that interest in Kenya – and Laikipia within this - has remained very weak since 2013 and is not showing the same resilience of before. This is compounded by the fact that since 2008, tourism operators in Laikipia have been under tremendous financial and other pressures and as a result have not been able to devote the time to collaborative marketing and promotional efforts as was the case prior to 2008.

Little has changed in terms of the product on offer since the detailed analysis in 2007. There are now over 40 tourism facilities in Laikipia, collectively providing over 1,100 beds and offering a similar expansive and creative range of different activities. Laikipia’s reputation for innovation has continued with certain operators using the wider challenges facing the region (for example, poaching) and the presence of wildlife research activities as an inspiration to develop new tourism products – such as using the infra-red night vision goggles normally used to detect poachers to instead view wildlife at waterholes at night from hides, and using the camera traps normally used by researchers to enhance guest experiences by enabling them to set their own camera traps in wildlife locations of their choice.

Significant opportunities exist for communities to develop partnerships on their land to also realise nature/wildlife tourism opportunities. This is further explained in section 12 below.

The average tourist facility today contains just 20 beds (and without the three much larger properties - Sportmans Arms (172 beds), Ol Pejeta Camp (180 beds) and Fairmont Mount Kenya (120 beds) the average figure is only 13 beds per property). In many cases the tourism footprint is managed in such a way as to maintain exclusivity for visitors, preserving the high quality wildlife viewing and wilderness experience that Laikipia has become renowned for. Urban tourism has also grown markedly in recent years – a result of general growth in Nanyuki in particular and as a by-product of the wider natural appeal of Laikipia. Facilities such as the Sportsmans Arms, Lions Court Lodge and Falcon Heights are targeting
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Business travellers and leisure tourists who are drawn to Laikipia by its relative accessibility from Nairobi and the proximity of wildlife and nature.

Below is a summary of existing tourism products in Laikipia provided by the Laikipia Wildlife Forum (at the time of preparation of this Master Plan the bed numbers data remains in the process of development). The price ranges are described as follows:

- High (over $400 per person per night)
- Mid (between $200 and $400 per person per night)
- Low (under $200 per person per night)

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PART 3: COUNTY GOVERNMENT ENABLING ACTIVITIES

This Part details the specific initiatives which the County Government proposes to focus upon in the implementation of this Master Plan. These initiatives are again considered with respect to short-term priorities and longer-term ambitions. The County Government recognises that tourism development in Laikipia should be primarily driven by entrepreneurs and the private sector, as they are best placed to react to market opportunities and therefore the sector will be more robust and commercially sustainable. However, regulation of the sector plays a vital role and such regulation should be developed with the principal goal of establishing an ‘enabling environment’ in which tourism businesses in Laikipia can thrive.

3.1 REGULATORY FRAMEWORK – COUNTY GOVERNMENT RESPONSIBILITIES

In Kenya there is an existing national regulatory framework for tourism, however the process of creating a regulatory framework at County level has just begun and the new Laikipia Tourism [Act] will provide for the creation of various County functions which will work to provide guidance and oversight of Laikipia’s tourism sector. Some of the key priorities for the County Government will include:

3.1.1 COUNTY ECONOMIC SPATIAL PLANNING

As noted in Section 5 above, tourism and other land uses must be considered together and there must be a comprehensive County spatial plan that examines the complex interconnections of Laikipia’s economic key drivers. This should involve all relevant functions of the County Government and the process will provide the basis for continues liaison and cooperation between different Ministries.

3.1.2 TOURISM SPATIAL PLANNING

Within the County Spatial Plan above, there should be a corresponding Tourism Spatial Plan. The product evolution and development opportunities identified in Part 8 will be optimised if there is a clear process of centralised oversight in order to achieve the correct balance between wildlife conservation and preservation of natural attributes such as views and scenery (upon which Laikipia’s tourism sector is principally based) and other non-tourism economic development efforts. Urban tourism similarly requires careful planning however the regulatory inputs are different due to the existence of more detailed urban planning policies.
In consultation with other County Government ministries and in accordance with the Laikipia County Integrated Development Plan, the County Government tourism authorities will define designated areas of land in Laikipia which are principally intended for wildlife and related nature tourism development (and other compatible forms of economic activity such as low-intensity and wildlife compatible livestock ranching). A zoning process will also consider the suggested new wildlife conservation areas contemplated within Part 12 below.

Key sites within Laikipia, such as the Ewaso Nyiro River, may potentially be set aside formally for County level protection from non-tourism infrastructure development so as to ensure that Laikipia’s most attractive locations are utilised either now or at the most commercially appropriate time in future.

There is also a strong need to define which areas of Laikipia are ideally suited for a ‘low density-high price’ tourism models and which areas are appropriate for ‘higher density-lower price’ use. Both models have relevance to Laikipia, especially in targeting new markets and providing for domestic market growth, however the needs of these models are different and they cannot usually co-exist within the same areas. The following dynamics are considered critical to any tourism use zoning process:

- **Capacity and Impact:** The tourism use zoning process will identify optimum tourism carrying capacities (number of beds and day visitation) for the specific zones of Laikipia and within this for any specific tourism concessions which may be identified on Government or community land as described in the paragraphs above (this will typically be defined on a number of beds basis).

- **Market Driven:** Tourism development thinking will evolve in collaboration with relevant private sector stakeholders from the Laikipia tourism industry, and must refer to wider national tourism development plans and policies such as Vision 2030.

Properly integrated natural resource use, conservation management and tourism development planning, based upon the dynamics above, will serve to drive:

- **Competitiveness:** The quality of the underlying Laikipia tourism ‘product’ will be optimised and therefore so too will its competitiveness in national and international marketplaces.

- **Laikipia Branding:** The better the underlying tourism product and the more businesses that are promoting this in the international marketplace, the more powerful Laikipia’s international tourism brand will become.
There is no precise system or set of rules which has been established in other countries with respect to the size of tourism zones in a given area. This decision will depend entirely upon the likely visitor numbers, the topography i.e. whether consideration is being given to a flat area with open grasslands or a hilly, wooded area where any tourism development will be easier to conceal).

A tourism zoning process will require to consider the aspirations of individual landowners and community groups and will detail:

1) Tourism Use Zones (the zones which visitors will access for activities such as game drives, walks and other activities).
2) Tourism Infrastructure Zones (the sites where lodges/camps and other tourism related infrastructure will be developed).
3) Exclusive Use Zones, which will be allocated to particular tourism businesses for a combination of 1) and 2) and in which no other operators will be permitted to enter or develop facilities. This aspect will depend heavily on landowner consents and involvement in the planning process.

The process for developing private sector tourism contracts on land which has been identified by a landowner, Government or by a community for a specific tourism concession is outlined in Appendix 3.

3.1.3 **INTER-MINISTERIAL LIAISON**

At the time of preparation of this Master Plan, the County Government is still in the process of defining its remit with regard to tourism in discussion with the relevant national tourism authorities. The detailed roles and responsibilities for the management and personnel of the new County tourism functions will be determined as a short-term priority within the context of the Laikipia County Integrated Development Plan.

As soon as these functions are clarified, the relevant people will inform all other Ministries of the objectives for tourism development within Laikipia, receive their perspectives and better understand other Ministerial priorities (e.g. transport or energy) which might affect Laikipia’s tourism sector (positively or negatively) and ensure that clear lines of communication are established and maintained, feeding in turn into the focuses of the new ‘Laikipia Tourism Board’ proposed below.

Particular attention will be placed upon potential developments which might affect the core attributes of Laikipia’s tourism sector as defined within Part 5 – in particular views and
scenery, which will be negatively impacted upon by developments which involve large buildings or structures, excavation of hillsides (e.g. quarrying) or light pollution at night.

3.1.4 Private Sector Dialogue

The County Government is committed to creating a strong and effective interface with the private sector. This will ensure that the County Government is able to learn directly - and at an early stage - of issues affecting the tourism sector in Laikipia. Similarly, the private sector will gain a deeper insight into the priorities (and constraints) facing the County Government and will as a result be more understanding and supportive in turn.

Strategic commitments include:

- Creation of a **dedicated and effective private sector tourism association** in Laikipia which will serve as a collective voice and information resource for the sector (see 10.1.2 below)
- In pursuance of the Laikipia Tourism Act (once passed into law), an overall ‘Laikipia Tourism Board’ be established (**an evolution of the present ‘Tourism Task Force’ which has been established as a joint County, LWF and private sector initiative to support the development and implementation of the new Laikipia Tourism Act and this Master Plan**) upon which representatives from Laikipia’s private sector tourism industry association will be present, together with representatives of the County Government.
- Recognising the challenges and time constraints facing the private sector in Laikipia (which has made collective association and collaboration very difficult when contrasted with pre-2008 efforts) there should be some method of both obliging and supporting licensed tourism businesses to engage in this process. This could include making it a compulsory condition of all tourism permits issued by the County Government for that tourism business to join the proposed Laikipia focused private sector association (any costs of that membership association – which should be kept to an absolute minimum – could possibly be supported by County Government through receipts from licence fees).
- There could be some sector specific ‘sub-forums’ of the private sector association created, such as a continuation of the present functioning ‘Bar & Hotel Owners Association’ in Nanyuki, a tourism transport forum and a forum focusing on wildlife/nature tourism provision. Every effort will be made to keep these functions streamlined, simple, and cost effective and these should be defined further through stakeholder consultation.
3.1.5 Operational Standards

The County Government is committed to finalising and thereafter implementing a system of operating standards for Laikipia hotels and other tourism accommodation facilities, in line with the national standards which are being coordinated by the Tourism Regulatory Authority and the standards of Ecotourism Kenya, a private sector led association which is leading the way in sustainable tourism development in Kenya. During stakeholder consultation, it was repeatedly stressed that any such standards for Laikipia should focus heavily upon principles of ‘sustainability’ and relevant proposals are set out in detail within Part 11 below.

3.1.6 Licensing and Permits

The County Government recognises that it is essential for any duplication with national tourism licences and permits (and related fees) to be avoided – and this is especially critical given the challenges facing Laikipia’s tourism sector at this time. During consultation there was evident confusion among tourism stakeholders as to the impact of the proposed County Finance Act and the possibility of ‘double-taxation’ arising from businesses being required to apply for permits and pay fees to both County Government and National Government. The County Government is committed to resolving these misunderstandings through inter-ministerial liaison and private sector dialogue.

The County Government will continue to liaise with national Government to ensure that an appropriate amount of the Kenya’s national budget is allocated to development of the County level tourism sectors.

3.1.7 Tourism Data Collection and Monitoring

Tourism data collection is an essential component of developing the sector in Laikipia. The data collection and analysis systems at national level in Kenya – and within most other African countries (particularly East African countries) – are relatively poor and it is therefore very difficult to undertake informed planning exercises. Given the new responsibilities falling to Laikipia’s County Government, there is an opportunity to put in place a robust (but not necessarily complex) system which will measure:

- Overall visitor numbers to Laikipia;
- Length of stay in Laikipia;
- Reason for visit, separated into categories based upon the market segments described in this strategy;
• If possible / practical, feedback from those visitors (although ideally this can be collected by the individual businesses with whom the tourists interact and in turn this can be fed back to the County tourism authorities).

County Government believes that it is essential to leverage the private sector in collection of this data, again potentially through conditions within their tourism licences and permits which oblige them to collate and remit certain (non-sensitive) data on their visitors.

3.1.8 Safety and Security

As noted frequently in the Parts above, the perception of Kenya – and unfortunately Laikipia within this - as an unsafe and insecure destination represents by far the largest challenge to tourism development. The County Government is committed to liaising closely with the national Government and other relevant County governments to ensure that Laikipia is as safe and secure as possible.

The County Government recognises that at this highly sensitive time, a single incident in Laikipia (especially involving tourists) will be immensely damaging to the future prospects for Laikipia’s tourism sector. Other countries have established a dedicated tourism police service, however this involves a layer of additional complexity and administration which is probably not prudent in the context of Laikipia. Instead, a division or function of the existing security services may in time be particularly focused upon tourism sector matters.

_The County Government is aware of reports received from tourism businesses of increasing harassment of tourist vehicles by traffic police in Laikipia. Every effort will be made by the County Government to halt this practice._

3.1.9 Improvement of Access

As noted above, at such time as international tourism hopefully increases again in Laikipia, efforts will be made by County Government to increase the frequency and routing of scheduled air access from Nairobi and other parts of Kenya. Many stakeholders have noted the benefits of Nanyuki airport being serviced by international flights from other East African destinations – principally Tanzania’s Serengeti. The existing facilities at Nanyuki should be developed and maintained and the use of the military air base considered in the event of expansion needs. Access to the proposed international airport at Isiolo will be promoted.

The County Government only has limited responsibility for roads, however these powers will be used in careful coordination with relevant Ministries to improve and maintain key tourism access roads. As noted above, there is not necessarily a requirement for roads to be tarred –
which impacts negatively on the sense of wildness in Laikipia which is in turn important for tourism – but they should be well built and regularly graded.

3.1.10 Tourism Infrastructure

The County Government will only engage in the development of any tourism infrastructure (e.g. signage, visitor information resources) following comprehensive dialogue with the private sector in order to establish whether such investments are necessary and targeted. In other destinations, much public money is wasted on tourism infrastructure which does not serve a clear market-driven purpose, in particular poorly conceived visitor centre facilities.

The County must develop a solid waste disposal system for tourism businesses in Laikipia.

3.1.11 Tourism Links

As noted in Section 5 above, Laikipia can serve as an innovator which builds the basis for tourism development in other counties. In addition to strong regional links, Laikipia should play a proactive role in all relevant national authorities and associations.

3.2 Implementation Support – Responsibilities of the New ‘Laikipia Tourism Board’

The County Government proposes to form a new ‘Laikipia Tourism Board’ which as noted above will consist of private sector and County Government representation, with a mandate to advance Laikipia’s tourism sector in pursuance of this Master Plan. The new Board (the ‘Board’) would have the following structure:

- An executive manager, who would coordinate the functions of the Board and be the liaison point for wider Laikipia tourism stakeholder input;
- A secretariat, which will integrate with the functions of the present County Tourism Department;
- Included within the above should be a person responsible specific for external communications, with responsibility for engagement of the private sector and with other national associations;
- Similarly, a dedicated function should relate to internal liaison and coordination with other County functions within the inter-ministerial activities;
• A key function of the executive should be oversight and management of the proposed new Operating Standards and tourism data monitoring and collection (see 9.1.7 above).

The precise functions of the new Laikipia Tourism Board and job titles within the executive team should be defined through further dialogue with the County leadership. Listed below are proposals for Board priority topics which are intended to form the basis for strategic discussion. These are also made with reference to the LWF commissioned 2007 Laikipia Tourism Strategy, which gave significant consideration to the role of private sector organisations in tourism development.

3.2.1 Identification of Tourism Development Opportunities

The Board could provide guidance to County Government and potential investors and/or donors regarding tourism development opportunities within Laikipia which would result in social and environmental benefits. This could have a particular emphasis on new wildlife areas and community conservancies (see Part 11 below) and the Board could act as an intermediary, facilitating any negotiation between a community and commercial partner(s). This would be a useful role if a relevant community has little experience of the realities of commercial tourism and if the investor is not used to the specific issues associated with communities in Laikipia.

3.2.2 Identification of Funding Opportunities

The Board could focus upon identification of funding partners (both grant and relevant commercial finance) for strengthening Laikipia’s tourism sector. Specific ideas for investment in tourism are considered within Part 14. The Board could advise upon suitable conduits for funds if donor funding has been secured by or for a private sector entity, whereby the donor may in certain cases feel the private sector entity is not an appropriate non-profit vehicle.

3.2.3 Marketing Support for Existing Enterprises

LWF has historically provided significant amount of marketing support to Laikipia’s tourism sector, in particular to community-based tourism enterprises. This has included covering the cost of attendance at trade and customer shows and printing brochures. While County Government budgets are likely to be constrained in this respect in future, the Board should assume and continue these functions where possible (see Part 13 for marketing and promotion recommendations).
PART 4: TRAINING & CAPACITY BUILDING

A key priority for the Board in supporting the development of Laikipia’s tourism sector will be training and capacity building for all relevant components of the industry. During the consultation and interview process, the importance of customer service was stressed as a means to differentiate Laikipia from other destinations. Training opportunities for local communities engaging in tourism was a similar priority.

4.1 TRAINING FOCUSES

The following aspects of training and capacity building will be prioritised by the County Government:

4.1.1 COUNTY GOVERNMENT PERSONNEL:

Laikipia’s tourism sector will benefit significantly from efforts to increase the capacity and understanding of the tourism sector among County Government leadership and staff. Tourism is a specialist sector, with many different layers, and the requirements of private sector businesses and their customer target markets need to be well understood if the County Government is to provide adequate support and regulation.

4.1.2 PRIVATE SECTOR ASSOCIATIONS

In order to function as a valuable part of the regulatory framework as outlined in Part 9 above, significant continued efforts will be required in order to organise the private sector into an effective industry body. This will require a series of meetings / workshops with all key private sector stakeholders invited, and regular and well structured ongoing communication between the County Government and the private sector. The result should be the formation of a new ‘Laikipia Tourism Association’ or similar title which should assume the responsibilities of the now defunct Laikipia Tourism Committee which operated under the auspices of LWF.

This new association would relate closely to all key national institutions, including but not limited to:

- The Kenya Tourism Board
- Kenya Tourism Federation (KTF) (being the umbrella organization for the private sector in tourism)
• Kenya Association of Women in Tourism
• Kenya Association of Tour Operators (KATO)
• Kenya Association of Hotel Keepers and Caterers (KAHC)
• Kenya Association of Travel Agents (KATA)
• Kenya Association of Air Operators (KAAO)
• Mombasa & Coast tourism Association (MCTA)
• Eco tourism Kenya (EK)
• Pubs, Entertainment and Restaurants association of Kenya (PERAK)

4.1.3 Exchanges

There should ideally be a system of exchanges for key persons within Laikipia’s tourism sector. This should be based upon merit with such exchanges being available to management personnel within leading private sector tourism companies and also key people within County Government. The development of such exchange programmes could focus initially within Laikipia (with programmes being developed and supported across various facilities and niche experiences within the County) however it could be expanded in time to include other parts of the country and (subject to funding) international opportunities.

4.1.4 Private Sector Placements

A progressive programme of private sector placements will be facilitated by the County Government, with a particular emphasis on local community tourism initiatives seeking to learn from established private sector businesses. The obligation to participate in this programme could again be a fundamental component of the issue of tourism operating licenses and permits, with the costs borne by the operators kept to a reasonable and fair level.

4.1.5 Early Tourism Education

Laikipia tourism stakeholders have stressed the importance of investing in school education programmes focusing upon tourism awareness and all associated issues of land use and wildlife. This is intended to build an understanding of the sector as an important component of the local and national economy and to also stimulate interest in school leavers in choosing tourism as a career. This programme should be closely aligned with existing Laikipia environmental education and educational initiatives and ideally incentives can be created for participating conservancies and tourism businesses.
PART 5: DEMONSTRATING LEADERSHIP IN SUSTAINABILITY

“Managed sustainably, tourism is an effective development tool. When tourism’s environmental, social, and economic and other constraints are addressed, tourism energizes economies”. (World Bank, 2014 Tourism in Africa report)

5.1 SUSTAINABLE TOURISM IN LAIKIPIA

During consultation and interviews with Laikipia tourism stakeholders, a common desire emerged for Laikipia to assume a leadership position in sustainable tourism principles and operations. This would build strongly upon the (primarily nature orientated) core tourism attributes which are summarised earlier. The County Government is committed to ensuring that Laikipia’s tourism sector goes much further than the many other destinations around the world who claim to be focusing upon sustainability but in practice do not have the creativity or commitment to make this a reality.

5.1.1 BENEFITS OF A SUSTAINABLE APPROACH

Aside from the obvious general advantages for the environment, there are two specific benefits which will result from a sustainability focused approach (if carried out comprehensively and consistently):

A. BETTER FOR LAIKIPIA’S TOURISM BUSINESSES

- **Better Overall Tourism Product:** Good sustainable tourism operations do not focus on the environmental side of their operations at the expense of commercial performance and related product management, associated traditional sales and marketing channels. These must form a continuing basis for all aspects of their operation. But as competition in this sector intensifies, creative sustainability driven product development combined with the proactive expansion of new and existing special interest market niches will serve to consolidate, differentiate and thereby enhance the core commercial strength and market competitiveness of those tourism operations in Laikipia that engage properly in this manner.

- **Better Market Positioning:** Tourism markets are becoming increasingly sophisticated and new segments are developing that seek to support businesses whose goals go beyond the financial bottom line and shareholder value (but don’t exclude them) to incorporate a wider variety of social, cultural and environmental
dynamics. Accordingly, new opportunities are emerging for progressive sustainability focused tourism operators to exploit this within the context of African nature tourism. Laikipia is very well positioned to be at the forefront of this new movement. In so doing, such operators not only provide new and better services to traditional consumer preferences, but are positioned early to capture and service new consumer preferences that are emerging alongside these (but won’t necessarily replace them).

B. BETTER FOR LAIKIPIA’S NATURE AND WILDLIFE

There will be improved support for Laikipia’s wildlife and nature, which in turn will serve to enhance the underlying tourism attributes of the County. This will happen in the following ways:

- **Industry ‘benchmarks’** will be established within Laikipia which will ensure that the emphasis of future tourism development will be on integration with conservation, the needs of local communities and environmentally responsible operating models;

- **Enhanced financial support** for conservation and social development due to the potentially improved competitiveness and resulting commercial dynamics. The Laikipia Conservation Strategy estimates that in an average year the wildlife-based tourism sector in Laikipia invests US$3.5 million (approximately Ksh 300 million) in social and infrastructure development such as security, roads, healthcare, education and livelihood support. A further USD$ 5 million (KSh 400 million) supports conservation projects (a figure provided by LWF in 2008 so this is now potentially higher). Over 50% of this support is understood to come directly from tourism earnings, with the remaining provided by donors.

- **Enhanced operational support** for wildlife conservation, whereby many tourism operations maintain strong communication and interaction with the Kenya Wildlife Service, LWF and other relevant conservation organisations.

5.1.2 Engaging Tourists in Laikipia’s future

A further benefit of a sustainability driven approach to tourism in Laikipia is that this will stimulate the creation of a new constituency of supporters for Laikipia’s wildlife and relevant community initiatives. By proactively exposing tourists in Laikipia to the values of, threats to and management of its natural areas – and the lives of the people who live in
Laikipia - not only can the overall tourism product be enriched but greater opportunities will exist for engaging tourists in Laikipia’s conservation and community development context.

Traveller philanthropy is already a key element of certain businesses within Laikipia’s tourism sector, however this should be expanded to other businesses as far as possible – in particular through appropriate operating guidelines and standards as considered in the section below. Research into this aspect of tourism in other parts of the world has demonstrated that such initiatives can have significant beneficial consequences.

5.1.3 Operating Standards for Sustainable Tourism

As a minimum, the recently developed standards of the national Tourism Regulatory Authority (TRA) will be adhered to by all Laikipia tourism businesses.

During consultation, many Laikipia tourism stakeholders referred to the further need for guidance and standards in order to achieve a consistent and meaningful approach to sustainability (which is intended to form a future element also of the national TRA standards). Most tourism businesses consulted feel that sustainability is both a fundamental requirement for any good tourism business, but also represents an opportunity for Laikipia to continue to differentiate itself from other destinations – both within Kenya and indeed globally.

It was recognised during consultation that every business is different: an urban hotel will have different requirements, constraints and opportunities when compared to a remote wildlife tourism focused camp or lodge. As such, any operating standards developed in Laikipia must be flexible. The process of developing this Master Plan involved review of the guidelines and operating standards of several leading international sustainable tourism initiatives.

The most accessible and widely applicable international operating standards are the Global Sustainable Tourism Council (GSTC) Criteria, which are the result of a worldwide effort to develop a ‘common language’ about sustainability in tourism. These standards (which are included in full within Annex 1) focus on social and environmental responsibility, as well as the positive and negative economic and cultural impacts of tourism. They focus both on destinations and hotels / accommodations and the criteria are organized into four topics:

- Sustainable management;
- Socioeconomic impacts;
- Cultural impacts;
• Environmental impacts (including consumption of resources, reducing pollution, and conserving biodiversity and landscapes).

The GSTC Criteria have been scrutinised carefully by Ecotourism Kenya and formed the basis for Ecotourism Kenya’s recently produced ‘Kenya Eco-rating Certification Scheme’ (included for reference within Annex 2).

A further excellent sustainable tourism focused organisation, with strong Laikipia links, is the ‘Long Run Initiative’ (www.thelongrun.com) which was founded by the Zeitz Foundation but has recently become an independent foundation registered in the UK and operating globally (and with key senior staff members based in Nairobi). The Long Run initiative works with a variety of individual tourism businesses and destinations in order to achieve sustainability, and involves a strong focus on integration of commercial success and wildlife conservation.

This initiative is arguably setting the highest standards in sustainability of any organisation working within this context and will be able to support those businesses within Laikipia with exceptional ambitions relating to conservation and sustainability.

5.1.4 A dedicated Tourism Standard for Laikipia County

In order to ensure serious commitment to sustainability, the County Government proposes to support all holders of tourism business permits to comply with appropriate operating standards and to agree to a periodical sustainability audit.

This recommendation will only work in practice if there is a workable set of standards for Laikipia County. Furthermore, the relevant skills and capacity must be present within the County Government (and within the proposed Laikipia Tourism Board) to supervise any audits of the standards in a simple and cost-effective manner.

Following detailed consideration within the ‘Laikipia Tourism Task Force’ forum in early 2015, the County Government proposes to adopt the Ecotourism Kenya standards as the basis for a set of future Laikipia Tourism Operating Standards, a draft of which is included within Annex 3. Given that the Ecotourism Kenya standards have been aligned to the Global Sustainable Tourism Council Criteria, Laikipia’s standards will draw upon global best practice.

The proposed Laikipia standards are tailored to the specific context of Laikipia and are designed in order to be inclusive of all Laikipia tourism businesses. As such, they are simpler than either the GSTC or Ecotourism Kenya standards, but are wholly consistent with their
main principles.

They are also intended to be sufficiently clear, concise and ‘user-friendly’ in order for the staff of the County Government tourism administration, including the proposed Laikipia Tourism Board executive, to use them as the basis for ongoing regulation and policy development decisions.

Any individual tourism business in Laikipia should also be encouraged to put themselves forward for the Ecotourism Kenya Certification Scheme. This remains a more in-depth and detailed standard. Laikipia should strive to have the highest proportionate representation of Ecotourism Kenya certified businesses in Kenya.

An independent audit authority should be hired by the Board to conduct audits and provide support services to those members whose audits result in identified shortcomings.

5.2 ‘Conservation Tourism’ – Going Beyond Sustainable Tourism

Due to the many significant immediate challenges to tourism in Laikipia, there is both a need and an opportunity to differentiate Laikipia in international terms. The fact that Laikipia has earned an international reputation for innovative approaches to nature conservation is of significant relevance to this Master Plan.

There is anecdotal evidence that mature, integrated tourism and conservation organisations such as Borana, Ol Pejeta and Lewa are managing to sustain reasonable tourism occupancies despite the current international market downturn. It is understood that this is at least partially attributable to the product opportunities and added value which comes through creatively exposing visitors to conservation activity and the additional ‘meaning’ which travel to ‘conservation destinations’ brings to visitors.

The ‘sustainable’ tourism principles outlined above should be the standard to which all Laikipia tourism businesses aspire (and upon which the proposed Laikipia Tourism Operating Standards will be based). However, there is an opportunity for certain businesses within Laikipia to go even further than this and to focus upon developing tourism in Laikipia’s natural areas along genuine ‘Conservation Tourism’ principles. This will appeal to a rapidly emerging global market niche within wider nature tourism and holds the potential for significant economic and conservation returns.
5.2.1 **Defining Conservation Tourism**

The principles that underpin the notion of *conservation tourism* extend well beyond traditional definitions of *nature tourism* and *eco-tourism*. A simple way to describe *conservation tourism* as a defined segment of the tourism marketplace is around the graduation of a theme:

- **Nature Tourism:** tourism based within and upon nature. This does not necessarily mean that it is beneficial to nature and in many cases the reverse can be true.

- **Eco-Tourism:** Nature Tourism but with a specific focus on ensuring that tourism facilities and associated operations / activities beneficially engage local people and are not in any way damaging to the environment.

- **Conservation Tourism:** Eco-tourism but with a specific focus on proactively engaging within high value conservation areas and contributing meaningfully to promoting their values and directly and indirectly supporting their conservation. No formal, universal definition has yet emerged but conservation tourism seeks to release both the true business potential and conservation potential that exists where tourism and conservation agendas are correctly aligned and integrated.

5.2.2 **Locations for Conservation Tourism Development**

Conservation tourism development efforts should be focused within those parts of Laikipia where:

Conservation *Values* are highest, both:

- Current values (the existing, present conservation values of the area)
- Potential values (the potential conservation values should conservation efforts succeed)
Conservation Threats are highest, both:

- Current threats (again, the existing and obvious threats posed to those conservation values)
- Potential threats (the likely future threats based upon wider trends in human encroachment and other factors)

Conservation Tourism development should also incorporate leverage, i.e. where conserving one area will have a disproportionately beneficial impact on the conservation of a wider area. For example, developing a conservation-focused tourism enterprise on or near to a key elephant corridor or a dry season grazing resource within the context of the wider Laikipia ecosystem will result in a far bigger area (or at least the wildlife within that area) being conserved.

5.2.3 Creating Effective Conservation Tourism Partnerships

An effective Conservation Tourism ‘partnership’ will require both the tourism operator and the conservancy or reserve management to be very strongly aligned and for their inputs into the partnership to be carefully planned and structured.

Conservation Based Product Development: Leading conservation tourism operations elsewhere in Africa place great emphasis on excelling at the design and delivery of traditional ‘safari’ products – both with respect to tourism operation accommodation and services as well as activities i.e. game drives, game walks etc.

Laikipia tourism businesses also do this, but they must further place proactive focus on designing products which are not only compelling from a recreational perspective but also from an educational perspective - enabling tourists to develop a greater insight into the conservation context that underpins their enjoyment of Laikipia’s wildlife and nature. There are two principle reasons for this:

- It will improve the market (and hence commercial) competitiveness of the overall tourism product in the context of a world where (a) competition within nature/wildlife tourism is becoming ever more intense and operating successfully in the present context for Kenyan tourism will require every operator to seek a distinctive, competitive edge, and (b) sustainable tourism trends are increasing
significantly and there is a need to continually ‘raise the bar’: there is growing market interest for engaging more ‘deeply’ at this level.

- As noted above, the **awareness** that will follow is fundamental to actively engaging each and every guest into the conservation context of Laikipia in the hope that they will become, at some level, ‘ambassadors’ for Laikipia’s wildlife and nature and ultimately may choose to support conservation in Laikipia through philanthropy.

In order to do this well, the tourism operation must build the capacity of its entire employee base – but particularly customer facing ones to fully understand the conservation context of the particular conservancy or reserve and of Laikipia in general - and the ways in which the tourism operation is engaging positively with that context.

### 5.2.4 Dynamic Marketing

The most proactive Conservation Tourism operations recognise the importance of building in messaging related to the conservation context in which they operate into their marketing materials and marketing activities. Not only does this serve a commercial purpose but it serves as another medium for promoting conservation and conservation issues more generally.

The whole ‘story’ of Laikipia’s wildlife and conservation-driven tourism industry and the people who live and work within the Laikipia landscape is something which will appeal to tourists – and as noted above, it will enable tourism operators (and Laikipia as a whole) to position Laikipia as a distinctive destination when compared with other countries in the region.

### 5.2.5 Potential Future Conservation Tourism Markets

The most obvious place to focus efforts on creating a Conservation Tourism emphasis in Laikipia is to target the large numbers of people globally who already have an understanding of and place importance upon conservation issues.

There are believed to be between 16 and 18 million members and/or registered supporters of conservation organisations around the world. While many of these will be youth members and others who may not have the resources or capacity to travel to Laikipia, many of these people will be relatively affluent and frequent travellers. If only a small proportion of these people were to travel to Laikipia (and to do so in a manner which supports conservation) then Laikipia’s tourism sector and natural areas would receive a significant boost.
Most large international conservation organisations have already recognised the potential of tourism to support conservation. Many are starting to offer dedicated supporter travel experiences and there is scope for Laikipia’s tourism sector to proactively target this market. The scale of the potential market for conservation tourism among membership based conservation organisations is illustrated by the following:

- One in six people in the Netherlands (population fifteen million) is a supporter of WWF;
- The Royal Society for the Protection of Birds in the UK has over one million members and is part of the global Birdlife International network which has a further one million members in other European countries alone;
- In the USA, there are estimated to be at least five million members of conservation organisations (including the Wildlife Conservation Society and its associated zoo network).

Targeted efforts to engage those organisations which have a strategic interest in Africa and in particular in East Africa with a view to in turn engaging their supporter base is an obvious first step for Laikipia.
PART 6: INVOLVING LAIPIA’S COMMUNITIES

The County Government is committed to greater involvement of Laikipia’s rural communities in the tourism sector. This issue was highlighted repeatedly during stakeholder consultation and the generation of economic or other social benefits for local communities that can be used to support or incentivise certain conservation outcomes will be a vital element of sustaining the natural and cultural resources upon which Laikipia’s tourism industry is based.

Much of the wildlife and nature tourism which has been developed in Laikipia so far is on private ranches. This is because the entrepreneurs who own or manage these ranches have seen the opportunities and have invested in them. **The same opportunities exist for communities in Laikipia.** Communities (through partners) will also be in a strong position to target new and emerging markets – in particular the domestic market.

Realising these opportunities will typically take the form of a partnership between a community and a skilled private sector operator, however for certain product types (for example the walking and ‘homestay’ itineraries noted in Part 8 above) there is scope for development of simple community managed guesthouses. Experience from other community-managed facilities (for example, Il Ngwesi in Laikipia) shows that unless very strong management capacity exists within a community, it is challenging for a rural community to successfully manage and market a mid to upmarket tourism facility.

6.1 COMMUNITY TOURISM PARTNERSHIPS – KEY DYNAMICS

In planning for the future, it is essential to consider how and where to engage local communities within the scope of Laikipia’s tourism sector. Certain dynamics have emerged to guide best practice in local community involvement in conservation based tourism contexts elsewhere in Africa. These are informed by the work of tourism development experts and wider social impact professionals. There are at times quite complex issues involved and this element of tourism development has historically proved to be very challenging. The best practice approaches identified elsewhere in Africa are summarised as follows:

a) **Local community livelihood linkages:** The linkages between the natural area’s conservation values and local community livelihoods must be clear. It will be difficult to justify working with a local community whose livelihood system neither impacts upon nor is impacted by the natural area and its wildlife because otherwise it will be
very difficult to build meaningful incentives for that community to become engaged in the conservation of the natural area or its wildlife.

b) **Consistency and Equality:** these linkages must be considered not only in terms of their existence but also their:

- **Consistency:** While the linkages may exist, they might not always be consistent. For example they may only be seasonal – particularly with the semi-nomadic peoples who inhabit many areas of Laikipia. The relevance of these linkages will be greater if community livelihoods are consistently impacting and being impacted by the conservation values of the natural area (e.g. human-wildlife conflict or incursions into agricultural areas).

- **Equality – of access and use:** While the linkages may exist they might not always be equal across the local community base. Some community members may have a greater degree of impact / reliance on the target natural resource values than others. The greater the degree of equality the better as a foundation for creating balanced buy-in to the tourism enterprise(s) being proposed across the entire community.

c) **Awareness:** As noted above, unless a target community has a clear understanding of the holistic (i.e. not only the ones that are of immediate relevance to them) values of the natural area of Laikipia in which they live – and also the threats (and implications of those threats) to those values - it will be very difficult to build meaningful incentives for that community to become engaged in conservation. The County Government is therefore committed to investment in training and capacity building in this respect.

d) **Vertical Multiplier Potential:** The potential exists to develop spin off businesses / benefits that are directly linked to the operation of ‘mother’ tourism enterprises. These will be businesses that by definition feed directly into the value chain created by the mother tourism enterprise. They might be agricultural initiatives that provide food to a lodge, or handicrafts to a lodge shop, or guiding and transport associations that are developed to support the delivery of a particular tourism product etc.

e) **Horizontal Multiplier Potential:** The potential to develop new businesses using the enabling environment that has been created by the development of the ‘mother’ enterprises. For example, the development of an effectively structured and governed community institution for the purpose of entering into and managing the original relationship with the tourism enterprise will enable that same community to engage in future business related arrangements and indeed wider political and administrative matters such as engaging
effectively on other fronts with County Government. Such wider capacity has, for example, been proven to be a key beneficial outcome for Northern Rangelands Trust communities.

f) Opportunity Costs: The opportunity costs to the community of the tourism business must ideally be low. These are the costs created by having to forego any alternative activity that will be precluded by the development of the tourism enterprise. For example, if a tourism lodge focusing on wildlife will preclude the development of more lucrative livestock or agricultural business activities there will inevitably be challenges in developing such a model.

g) Target Stakeholders / Community: Core Dynamics: The target beneficiary stakeholders / community must be possible to clearly define (in terms of membership) and that membership must be stable i.e. a low level of immigration and emigration. This presents particular challenges for engaging some of the semi-nomadic and otherwise temporary communities within certain parts of Laikipia.

h) Target Stakeholders / Community: Capacity to Engage

- **Willingness to engage:** The target beneficiary stakeholders / community must all actively desire to be engaged in the tourism venture or in the structures (such a community wildlife conservancy) that might support it.
- **Entrepreneurial culture:** Ideally, the target beneficiary stakeholders / community will have a demonstrable culture suited to entrepreneurial endeavour.
- **Relevant property rights:** The greater the property rights the beneficiary stakeholders / communities have over land (primarily) or other assets relevant to the proposed tourism enterprise – the greater the likelihood of them being able to secure meaningful benefits from their development. Group ranches are relatively clear, however for the more uncertain land ownership contexts elsewhere in Laikipia, where communities do not yet have any defined rights of ownership or resource access, the County Government is committed to providing input and technical support.
- **Complimentary skills:** The target beneficiary stakeholders / community should ideally have skill-sets that could be deployed (and therefore valued and remunerated) by the tourism enterprise.
- **Institutional & Governance Structure:** Effectiveness in this regard is critical to the optimum management and distribution of benefits from any tourism enterprise. The following dynamics are relevant:
  - **Existence:** of such structures;
Laikipia Tourism Master Plan –2015 - 2025

- **Representation**: the manner in which the wider community/stakeholders are represented within them;
- **Functionality**: the extent to which they are actually applied in practice.

**i) Access to Funding**: Together with property rights, any available finance that can be secured or provided by the target beneficiary stakeholders/community (or on their behalf) will optimise the ability to secure meaningful ownership of, and related benefits from, the proposed tourism enterprise.

**j) Management Capacity**: As highlighted also in the relevant sections of the LWF commissioned 2007 Laikipia Tourism Strategy, a key lesson learned from community tourism partnerships elsewhere in Africa – and in particular from community-managed facilities – is the importance of adequate management capacity.

### 6.2 Community Tourism Partnerships – Potential Locations

As noted above, there are several communally owned group ranches in north Laikipia where opportunities for further community tourism partnerships may exist in future. The leading examples of community tourism partnerships in this area of Laikipia are The Sanctuary at Ol Lentille, Tassia Lodge and Koija Star Beds, all of which involve private sector operators.

The community-managed facility at Ol Gaboli has experienced the familiar challenges of many other community-managed tourism facilities across Africa, where a lack of capacity and tensions within the community itself around strategy and financial management have led to operational difficulties.

An additional opportunity for community tourism development is to focus upon the extensive area of sub-divided former private ranches which are intended for smallholder settlement. Many of these are unsuitable for crop-based agriculture and represent a significant opportunity for wildlife-compatible economic activity involving perhaps a combination of tourism and low-impact livestock.

The LWF commissioned Laikipia Conservation Strategy notes that approximately 34% of Laikipia County consists of such areas, which are largely used for informal grazing by semi-nomadic pastoralist people and which the Strategy notes “offers some of the greatest potential for the expansion of conservation-compatible land-use in Laikipia”.

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Laikipia Tourism Master Plan –2015 - 2025
As noted earlier in this document, a large area of Laikipia is also under government ownership (over 1,500 km² of Laikipia). This too represents an opportunity for engaging communities and private sector operators to develop tourism facilities on government land which would produce financial and other benefits for Government, communities and private sector alike.
PART 7: MARKETING & BRANDING

Significant marketing and promotional activities will be required to support the development of tourism in Laikipia – especially given the very challenging outlook for Kenya’s tourism sector. These efforts should be particularly aimed at the target markets described in Part 8 above and the preparation of a detailed marketing and promotion ‘Action Plan’ for Laikipia will be an early priority for the County Government.

The private sector will develop their own business specific marketing and promotional strategies, however it is very important to also have an over-arching County Government led initiative to consistently promote Laikipia’s collective tourism assets. As noted above, LWF carried out such a coordinating role until relatively recently and it has been an important factor in Laikipia’s tourism development to date.

Long-term focused branding efforts must be undertaken in parallel in order to positively influence international perceptions of Laikipia as a safe and rewarding tourism destination. By encouraging the national Kenyan tourism authorities to provide accurate and reassuring information on which regions within Kenya are safe for travel (including Laikipia), and building trust among niche tourism industry circles, it will be possible to sustain a core of tourism activity from which the wider national tourism industry can then ideally build upon throughout the recovery process.

The Master Plan development process has involved review of the Marketing & Branding Strategy prepared by Tom Buncle in 2008 on behalf of LWF. Much of this strategy remains wholly relevant today and the key elements are reproduced within the commentary below.

7.1 GLOBAL TRENDS RELEVANT TO LAIKIPIA

**Long-term** global tourism trends include an increase in long-haul travel and an ageing society in Laikipia’s traditional markets (UK, Europe, USA). Travel motivation is increasingly driven by a desire to escape busy metropolitan lives, to recharge emotional batteries, to seek simplicity, space, unspoiled nature, personal fulfilment, and cultural authenticity, as well as an interest in seeing wildlife in its natural habitat, and an increasing interest in adventure and outdoor activities.

In the **short-term**, the global recession has reduced spending on travel, although evidence suggests that confidence in certain source markets are recovering. Holidays represent a
necessity - rather than a luxury - in many of these traditional tourism-producing markets. The number of short breaks taken in a year and the total spend per trip have suffered, rather than the main annual holiday. The wealthy retired, who comprise a significant sector of Laikipia’s market, is one of the more resilient sectors of the wider market.

The now almost universal trend towards internet research for holidays, and in particular the use of social media among most target market groups, enables more interactive and personalised communication (including user-generated content such as peer reviews on sites such as TripAdvisor and photo/video sharing). This is an opportunity that businesses in Laikipia are increasingly taking advantage of and it is likely that social media based marketing techniques will become ever more important in the years to come.

### 7.2 Laikipia’s Marketing Appeal

The natural environment, with Mt. Kenya as an iconic backdrop, is spacious and rich in wildlife and culture. It is a real working landscape, shared by people and animals. It is (unusually) an expanding ecosystem, with a remarkably pleasant climate. Activities, such as horse riding, guided walks and cycling, offer opportunities to experience the landscape and get close to wildlife. The relatively ‘un-touristy’ and spacious landscape, coupled with high quality lodges, plus the opportunity to engage with and learn from local people, convey a sense of ‘private safari’, which appeals to the holiday aspirations of a certain market segment.

Laikipia also boasts increasingly vibrant centres of population such as Nanyuki, with good quality hotels and accessibility from Nairobi. High speed internet and communications make certain parts of Laikipia increasingly attractive for business visitors.

However, Laikipia has suffered to some extent from the mass market image of Kenya. This keeps it off the agenda for some who might otherwise be potential visitors, and means it is dismissed by some tour operators who could otherwise sell it. Laikipia is also suffering greatly from the wider security issues presently affecting Kenya.

This therefore presents an opportunity – and a need - to promote Laikipia as an aspirational and different type of African destination where visitors are assured of safety. There is a need to reposition Kenya on the international stage by using Laikipia’s strengths and values to surprise the prejudiced and challenge misconceptions.

Laikipia would be able to create more impact in the international marketplace if tourism
operators in Laikipia worked more together (but not at the expense of their own individual marketing efforts) and exploited current internet and social media technology more effectively.

It would also be in the interest of tourism operators in Laikipia to engage with officials and opinion-formers beyond Laikipia to communicate the conservation successes and community benefits that have been achieved, in order to improve their understanding of the impact of tourism in Laikipia and address misconceptions about its beneficiaries.

### 7.3 REGIONAL NETWORKS

During consultation, Laikipia tourism stakeholders stressed the importance of establishing regional marketing and wider collaborative relationships. For example, working with **Meru County** on Mount Kenya promotional efforts and establishing combination itineraries between Laikipia and Meru National Park (an already popular combination for some Laikipia tourism lodges and camps).

Collaboration with **Nyeri County** with regard to combined Laikipia and Aberdares itineraries is also obviously beneficial – and the development of Nyeri as an administrative and agricultural centre will have positive implications for business and conferencing tourism in Laikipia.

Collaboration with **Rift Valley** stakeholders with regard to Laikipia and Rift Valley combination itineraries is also important, with the western reaches of Laikipia in particular an opportunity for extended itineraries.

Exploring the possibilities to further link Laikipia with the wider **Isiolo, Wamba** and **Maralal** areas as visitors use Laikipia as a ‘spring-board’ to explore northern Kenya is also recommended. The Northern Rangelands Trust Trading arm, XXXXXXX presents a much-needed and logical networking opportunity.
7.4  THE LAIKIPIA BRAND

The Branding Strategy prepared by Tom Buncle in 2008 has been implemented since by LWF and partners, with apparent success. Looking to the future, it is worth repeating the key messages within the branding exercise, as these remain relevant today (and can be supplemented by additional elements which seek to address the current market climate in 2015).

The factors that differentiate Laikipia most from its competitors were felt during the 2008 brand definition exercise to be:

A sense of freedom and space that is related to the ‘un- touristy’ and tranquil landscape; and an intensely personal experience, which reflects both the level of personal hosting in lodges as well as the exhilaration of experiencing nature close up by, for instance walking, cycling or riding in relative solitude in this expansive landscape.

The animals and culture that are visible and accessible within this setting and the combination of the four elements of space, personal experience, wildlife and culture serve to define the Laikipia experience, which makes it different from most other destinations. Laikipia’s brand essence, or brand values, were described in the 2008 strategy as:

• Expansive  • Engaging  • Exhilarating  • Stylish

The following positioning statement was agreed by Laikipia tourism stakeholders as encapsulating Laikipia’s brand assets:

• Laikipia is Kenya’s high country. It offers solitude, freedom and space in a wild landscape, whose diversity ranges from the snow-capped peak of Mt. Kenya to the edge of the Great Rift Valley to desert.
• It has an abundant variety of wildlife and diverse culture. Yet it is a genuine working environment, where you can engage with people on a personal level – with guides, hosts and the local people, who are working together for a sustainable future for Laikipia.
• It offers genuine intimacy and adventure: whether experiencing its wildlife, scenery and solitude on horseback, foot, bicycle, balloon or flying safari.
• It is warm, friendly and stylish, in the way guests are personally hosted in architecturally unique and comfortable lodges.
Laikipia’s crisp clear air, boundless vistas and **unrestricted access** to the landscape and wildlife offer an invigorating and exhilarating experience in an astonishingly comfortable climate for an equatorial destination.

Its **expanding eco-system** reflects one of Africa’s most successful attempts to restore the balance that used to exist between people, wildlife and the land. It is a place where people treasure the resources they have inherited and are committed to securing them for future generations.

The branding exercise carried out in 2008 did not expressly incorporate urban tourism offerings, however the essence of Laikipia as a destination would still focus upon its wilderness and natural assets as described above. The main brand should however be adapted in order to include some ‘sub-brand’ elements reflecting the appeal of Laikipia’s urban tourism products for business and conferencing tourists and visitors en route to natural attractions.

The Laikipia Tourism Board should develop a detailed marketing action plan as soon as possible in order to operationalize these identified priority areas.
PART 8: INVESTMENT AND FINANCING STRATEGY

Finance will be an essential component of realising Laikipia’s tourism sector potential. At the moment, both the donor and commercial investment climate for tourism in Laikipia are uncertain due to concerns regarding security in Kenya as a whole – and the related impact upon future tourism industry prospects.

In the medium term, however, two principal financing categories will influence the development of Laikipia’s tourism sector:

1) Development Finance: Development finance (primarily in the form of grants) will be the most appropriate form of finance for initiatives such as training and capacity building, technical support for the development of operating standards around sustainability, tourism planning and zoning and for supporting centralised Laikipia tourism marketing efforts.

2) Commercial Finance: Tourism operators, if provided with a secure and well-planned operating environment, will be able to bring their own commercial investment finance and will be able to leverage finance from an increasing number of ‘impact’ financing organisations who are interested to support businesses which result in positive social or environmental impact (in particular businesses which are committed to wildlife conservation).

An early implementation action in pursuance of this Master Plan will be to identify those development grant-financing opportunities which may be relevant for Laikipia’s tourism sector in the short term.

Commercial tourism operators will be encouraged to provide in-kind support for carefully coordinated donor visits and for hosting key journalists and key strategic partners interested in supporting Laikipia’s tourism sector. Similarly, businesses should be encouraged to support the proposed exchange and placement schemes contemplated within the Training and Capacity Building sections above.
8.1 COUNTY AND NATIONAL GOVERNMENT INCENTIVES

The World Bank notes in its 2014 ‘Tourism in Africa’ report that economic incentives should be provided by governments during infancy or transformation stages of developing a tourism sector. In Tanzania, for example, an investment promotion and an outreach program organized by the national government in 2002 resulted in over $100 million in investment in the following two years.

The main components were an investment forum and a follow-up investor outreach program, supported by professional tourism and business development expertise. Investors were attracted by direct financial assistance, such as bonds or special-purpose taxes, indirect assistance (e.g. good planning, zoning and concession tendering processes), and fiscal measures such as tax breaks.

The County Government will consider a system of incentives which are aligned to the recommendations within this Master Plan, with a particular emphasis upon:

- Incentivizing commercial businesses to invest in community conservancies and new wildlife areas within Laikipia;
- Increasing their local employment and training investment to create further opportunities within the sector for local Laikipians;
- Investing in sustainability and conservation support initiatives – in particular the sustainability-driven operating standards which this Master Plan incorporates.
PART 9: IMPLEMENTATION PLAN

The following actions have been developed by the Laikipia Tourism Task Force. They are intended to serve as guidelines for the Task Force, and thereafter, the new Laikipia Tourism Board. There are a series of preparatory efforts and these are followed by a subsequent series of actions intended to position Laikipia as the leading sustainable tourism destination in Kenya.

These actions pre-suppose the approval and adoption of the Master Plan by Laikipia County Government and Stakeholders. They also presume that the terms of reference for the Laikipia County Tourism Board have been approved and candidates identified, with articles of association that guide good governance, and ensure the Board’s sustainability. The Task Force foresee this process dominating the first half of 2016.

The Master Plan authors also propose that the Laikipia County adopt a private sector tourism association as a way for the Laikipia County Tourism Board to communicate effectively with the private sector. The proposed Laikipia Tourism Association will be a dedicated association representing all of Laikipia’s private tourism sector. It could stand as an independent body, or form an essential segment of the Laikipia Chamber of Commerce and Industry.

Once formed, the Laikipia Tourism Association should consider the appointment of licensed businesses to sub-sector groups who are focused on, for example, urban tourism, wildlife tourism, conference tourism, etc. Members from this group might logically serve on the County’s Tourism Board.

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<th>Objective</th>
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<td>Preparatory Actions</td>
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<tr>
<td>1.0</td>
<td>Prepare a detailed marketing and branding plan for Laikipia</td>
<td>1.1. Review and refresh the 2008 LWF-commissioned marketing and branding strategy</td>
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<td>1.2</td>
<td>Conduct Stakeholder consultations on marketing priorities for a central marketing coordination effort.</td>
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<td>1.3</td>
<td>Prepare a Detailed Action Plan including responsibilities and budget</td>
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<td>2.0</td>
<td>Conduct one catalytic event in Laikipia before the end of 2016</td>
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<td>2.1</td>
<td>At present, the Laikipia County Government, the private sector and LWF will make a bid to host the 2016 Kenya Tourism Board's Marketplace in Laikipia.</td>
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<td>2.2</td>
<td>Conduct stakeholder consultations on event priorities, mandatory conditions, and options for a successful KTB bid</td>
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<td>2.3</td>
<td>Submit bid and as a result, determine roles, responsibilities, budgets and an action plan for the Laikipia County Tourism Board</td>
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<td>2.4</td>
<td>Host event accordingly</td>
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<td>3.0</td>
<td>Establish a system of tourism data collection, management, analysis, and monitoring</td>
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<td>4.0</td>
<td>Identify sources of donor/development finance which may be leveraged to develop Laikipia's tourism sector</td>
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<td>5.0</td>
<td>Identify sources of commercial finance for Laikipia tourism businesses development and promotion</td>
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<td>6.0</td>
<td>Develop and launch Laikipia Tourism Standards and ensure compliance with other national standards</td>
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<td>7.0</td>
<td>Establish formal linkages with national tourism organizations and neighbouring counties</td>
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<td>8.0</td>
<td>Develop at least 2 Public Private Partnerships for sustainable tourism enterprise in the County</td>
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<td>9.0</td>
<td>Ascertain and Standardize the costs of operating a Tourism Business in Laikipia</td>
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<td>10</td>
<td>Develop a Tourism Incubator to supply one-stop shop services related to sustainable tourism enterprise development</td>
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### Sustainability Actions

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<td>11</td>
<td>Awareness Creation</td>
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<td>• Sustainable tourism</td>
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<td>• Global Sustainable Tourism Standards (GSTS)</td>
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<td>• Green Destination Certification</td>
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<td>• Others</td>
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<td>12</td>
<td>Capacity Building Curriculum Development</td>
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<td>• Training Needs Assessment</td>
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<td>• Hotels</td>
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<td>• Wildlife Tourism Facilities</td>
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<td>Community Tourism</td>
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<td>13</td>
<td>Capacity Building Sessions for different stakeholder groups</td>
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<td>14</td>
<td>Develop an Incentives and Awards Scheme for GSTS and Green Destination Certification</td>
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ANNEX A: TOURISM DEVELOPMENT CONTEXT – GLOBAL TRENDS

1.1. INTERNATIONAL MARKET TRENDS

Tourism is a powerful vehicle for economic growth and job creation all over the world. The tourism sector is responsible for 8.8 percent of the world’s jobs (258 million); 9.1 percent of the world’s GDP (US$6 trillion); 5.8 percent of the world’s exports (US$1.1 trillion); and 4.5 percent of the world’s investment (US$652 billion).5

The World Travel & Tourism Council further estimates that 3.8 million jobs (including 2.4 million indirect jobs) could be created by the tourism industry in Sub-Saharan Africa (SSA) by 2024. From a small base of just 6.7 million visitors in 1990, SSA attracted 33.8 millions visitors in 2012.

Receipts from tourism in 2012 amounted to over US$36 billion and directly contributed 2.8% to the region’s GDP (total contribution, including direct, indirect and induced, stood at 7.3% of GDP)6. Within Kenya, the direct contribution to GDP is understood to be one of the highest in Africa at approximately 8% and the indirect contribution perhaps as high as 14%7.

Stakeholder consultation in preparation of this Master Plan has concluded that nature tourism or ecotourism is and will continue to be the most prominent form of tourism in Laikipia – either directly (through tourism experiences offering nature) or indirectly (by urban and other establishments benefitting from tourism visitation stimulated by Laikipia’s nature). Every tourism business consulted during the stakeholder consultation process (including urban tourism facilities) stated that nature and wildlife are important to their business. As such, the trends influencing this sub-sector of global tourism are particularly relevant.

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5 World Travel & Tourism Council 2011

6 World Travel & Tourism Council 2013

The International Ecotourism Society ([www.ecotourism.org](http://www.ecotourism.org)) defines eco-tourism as *responsible travel to natural areas that conserves the environment and improves the wellbeing of local people* and says the following on the current status of the sector:

- The wider sector of *nature tourism* is growing globally at 10%-12% per annum;
- Since the 1990s, the sub-sector of *ecotourism* has been growing at a rate of 20%-34% per year;
- *Nature tourism* is growing 3 times faster globally than the tourism industry as a whole (and therefore it could be said that *ecotourism* is growing at between 6 and 8 times the rate of normal tourism).

The International Ecotourism Society also makes the following general observations on the global tourism sector as a whole:

- ‘Resort’ or regular package tourism has now “matured as a market” and its growth is projected to remain flat. In contrast, ‘experiential’ tourism—which encompasses ecotourism, nature, heritage, cultural, and soft adventure tourism, as well as sub-sectors such as rural and community tourism—is among the sectors expected to grow most quickly over the next two decades;
- The United Nations Environment Programme (UNEP) has indicated that most tourism expansion is occurring in and around the world’s remaining natural areas;
- Analysts predict a growth in eco-resorts and hotels, and a boom in nature tourism — and suggest *early converts to sustainable tourism at destination level will make significant market gains*. These trends are illustrated in the graphs below.
The International Ecotourism Society have also stated that sustainable tourism could grow to 25% of the world’s travel market within 6 to 10 years, taking the value of the sector globally to US$474 billion per year.
The UN’s World Tourism Organisation (www.unwto.org) also states that ecotourism and nature based tourism are among the fastest growing market segments worldwide. Research by UNWTO has shown that 8% of all trips currently sold worldwide can be described as ecotourism, with a potential grow to 15%.

The growth in the ecotourism sector is also increasingly recognised beyond the tourism industry itself. Economy Watch (www.economywatch.com/world-industries) recently stated that:

“The ecotourism industry is fast catching up with other flourishing industries of the world. Ecotourism is growing by leaps and bounds. The ecotourism market makes up 6% of the GDP all over the world. Ecotourism refers to the practice in which the place one visits is not harmed in any way, thereby maintaining the natural equilibrium of the place. This includes aspects related to maintaining the flora as well as the fauna of the place. Every effort is made to keep the place in its original form.”

Laikipia has an opportunity to go even further. See Part 11 below relating to the scope for development of an even more impactful and distinctive form of tourism: ‘conservation tourism’.
1.2 CONSTRAINTS TO TOURISM GROWTH – AFRICA CONTEXT

In planning Laikipia tourism development over the next 10 years, it is valuable to understand the challenges facing Sub-Saharan Africa as a whole. To achieve its tourism potential, the World Bank states that SSA will have to address a number of existing constraints including land availability, investor access to finance, taxes on tourism investments, low levels of tourism skills, lack of security, safety and crime, public health, visa requirements, red tape and bureaucracy. Critical constraints, where the resolution is dependent on the actions of government, include:

**Air transport:** SSA’s distance from source markets creates an acute need for higher quality and more competitive air access. Despite having 15% of the world’s population, the continent of Africa is served by only 4% of the world’s scheduled air service seats. Nevertheless, this seat supply grew by 6.5% between 1998 and 2009, and Ethiopia, Mozambique and Tanzania experienced double-digit growth.

Studies commissioned by the Africa Region of the World Bank found that airfares were almost 50% more expensive to SSA, and charter tours were 20-30% more expensive than to comparable destinations elsewhere. The irregularity or non-availability of intra-regional air connections and of internal air transport is believed to constrain access to internal destinations and also prevents progress with multi-country tourism packages (this is relevant with respect to the regular calls from Laikipia tourism stakeholders for increased air access into Nanyuki, including international routes to and from Tanzania’s Serengeti and Zanzibar). In certain destinations, the private sector has invested in local airlines to compensate for specific deficiencies in routing and the high costs of internal and intraregional travel.

**Road transport:** Notoriously poor in much of Africa, roads cannot compensate in most countries for the inadequacy of internal air transport. Yet, both Namibia and South Africa are examples of destinations that through consistent investment in infrastructure are now able to attract large numbers of self-drive tourists. Namibia is an especially relevant parallel with Laikipia and northern Kenya, where the scenery, culture and wildlife product are similar in many ways and – with safety of visitors almost guaranteed (a further key difference with northern Kenya) represent a magnificent self-driving holiday experience.
Tour operators: UK and US tour operators report that a higher proportion of tourists to SSA use tour operators (some 50-70%), more than in other parts of the world (10-15%), because of the greater complexities of obtaining visas, booking accommodation and making tour arrangements when travelling to SSA. Although Laikipia tourism operators are aiming to grow directly generated bookings (see Stakeholder interview results in Part 7 below), Laikipia will remain heavily dependent upon tour operator attitudes and destination understanding for the foreseeable future.

Accommodation: Just 10% of the SSA region’s 390,000 hotel rooms are estimated to meet international standards, and South Africa has about half of this stock. Kenya, Mauritius and Seychelles have established hotel investment/development markets; however unbranded guesthouses and lodges comprise the largest share of accommodation facilities. High hotel prices are primarily due to high hotel development costs (which are understood to be higher in general in Africa than other parts of the world) and the cost of obtaining debt financing.
ANNEX B: TOURISM DEVELOPMENT CONTEXT – EAST AFRICA

The status of the tourism sectors of other East African nations can also serve to inform long term policy development in Laikipia. In particular, the relationship between government investment in tourism development and corresponding national economic impact has been analysed.

1. KEY FINDINGS – EAST AFRICAN TOURISM SECTOR DATA COMPARISONS

The graphs and commentary below (and the further information within Appendix 5) provide a consolidation of analysis of the different tourism dynamics for each of Kenya, Tanzania, Uganda and Ethiopia. Wildlife, nature and strong protected area systems (including public, private and community land) have been found to be crucial elements of the tourism sectors in each country. The most recent years for which comparative data for all countries has been obtained ranges from 2010 to 2014, depending upon the indicator, with the first graph below showing the period from 2000 to 2011.

1.1 INTERNATIONAL TOURISM ARRIVALS

![International tourism: number of arrivals graph]

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As might be expected, given the historic strength of its tourism industry, Kenya boasts the largest visitor numbers. However, the sharp drop in visitors in 2007-2008 as a result of the election violence in Kenya is striking and it is expected that the recent security issues following Westgate and other attacks will have had a similar negative impact. It is interesting to note the steady increase year on year of visitors to the other countries, particularly Uganda which has invested heavily in tourism marketing initiatives in recent years.

1.1.2 International Tourism Expenditure (Current US$)

The above graph shows the expenditure by international visitors. While the number of visitors in Tanzania is lower than in Kenya, the overall spend is higher due to the fact tourism experiences are aimed at a higher price point.

1.1.3 Tourism Sector Investment Against Tourism Sector Contributions to Gross Domestic Product (GDP)

Definitions

*Direct Contribution:* GDP generated by industries that deal directly with tourists, including hotels, tour operators and travel agents, airlines and other passenger transport services, in addition to the activities of restaurant and leisure industries dealing with tourists. It is equivalent to total internal travel & tourism spending (see below) within a country less the
purchases made by those industries (including imports).

*Total Contribution*: GDP generated directly by the travel & tourism industry plus its indirect and induced impacts including:

- **Capital investment** – includes capital investment spending by all sectors directly involved in the travel & tourism industry. This also constitutes investment spending by other industries on specific tourism assets such as new visitor accommodation and passenger transport equipment, as well as restaurants and leisure facilities for specific tourism use.
- **Government collective spending** – general government spending in support of general tourism activity. This can include national as well as regional and local government spending. For example, it includes tourism promotion, visitor information services, administrative services and other public services.
- **Supply-chain effects** – purchases of domestic goods and services directly by different sectors of the travel and tourism industry as inputs to their final tourism output.
The above graphs show that there is a consistent return on investment into the tourism sector in each of the four countries profiled. Each has achieved a considerably higher return on investment in terms of direct contribution to GDP and an even higher wider contribution when indirect GDP impact upon other related economic sectors is also considered.
**Notes**

- **Direct contributions:** Tourism sectors across all four countries directly contribute between 3.8% - 5.1% towards national GDP.
- **Total contributions:** Tourism sectors across all four countries in total contribute between 8.8% - 13.2% towards national GDP.

### 1.2 SUMMARY OF KEY FINDINGS – EAST AFRICAN TOURISM SECTOR DATA COMPARISONS

1. **International tourism arrivals**

   - Ethiopia, Tanzania and Uganda have experienced consistent growth in international tourist arrivals;
   - Kenya, whilst receiving comparatively more tourists than the other countries,
experienced rapid growth in tourist arrivals until 2007 when election violence sparked a sudden decline in tourism numbers until late 2008 when arrivals began to recover (and according to industry opinion these are understood to have fallen dramatically again since the Westgate crisis in late 2013);

- It is positive to note that all four countries retained consistent growth in tourist arrivals in the period 2008 – 2012 despite the global economic crisis.

2. **International tourism expenditure (current US$)**

- Uganda and Tanzania have experienced robust increases in international tourism expenditure since 2004 with Tanzania in particular being a major receiver relative to the other countries;
- Kenya and Uganda conversely have been relatively stagnant in their real term receipts of international tourism expenditure;
- In Uganda and Tanzania, there is a correlation between international tourist arrivals and international tourism expenditure, whereas in Ethiopia and Kenya this relationship is not obvious - a contributing factor to this trend will be macro-economic market conditions linked to US$ foreign exchange and inflation and also – in Kenya at least – the lower price point of much of the country's tourism products.

3. **Tourism sector investment against tourism sector contributions to Gross Domestic Product (GDP)**

- **Kenya**: Between 2007 and 2010, Kenya reduced real term investment into tourism sectors resulting in a drop in GDP contributions until 2009 when GDP contributions began to increase again. A potential reason for this is that Kenya considers itself to be an established and mature tourism destination and therefore less investment is required to create the equivalent growth in GDP output. Kenya’s national tourism statistics for the period 2008-2012 stated that the tourism sector contributes an estimated 10% of GDP;
- **Ethiopia**: The data suggests that there has been a direct correlation between investment in tourism sectors and the direct and total contributions of those markets to GDP. This is particularly notable post 2009;
- **Tanzania**: Tanzania shows consistent correlations between investment in tourism sectors and GDP contributions from those markets. Although growth has been slow, it has shown a steady trend with low volatility demonstrating a stable tourism sector
and macro-economic environment within the industry;

- **Uganda**: Tourism sector contributions to GDP have outperformed investment into the sector over the reporting period. A reason for this may be that Uganda is one of the only and best-known countries to view species such as mountain gorillas which are often the defining reason for tourists to visit the country. This is twinned with an increasingly positive perception of Uganda as a tourist destination, driven by improved political stability in recent years (although current political perceptions may have served to change this).

4. **Tourism sector investment against tourism sector national employment contribution** *(see Appendix 5 for data charts)*

- **Kenya, Tanzania and Ethiopia**: Post 2008, all three countries show a correlation between tourism sector investment and employment. This demonstrates that it is important for governments to maintain investment into the tourism sector to ensure consistent employment uptake.
- **Ethiopia**: Ethiopia shows a direct correlation between investment into the tourism sector and the direct and total employment contributions.

5. **Tourism sector investment against visitor exports and international tourist arrivals** *(again, see Appendix 5 for data charts)*

- **Kenya, Tanzania and Uganda**: Visitor exports are correlated to visitor arrivals yet there is inconclusive correlation with investment into the tourism sector. As previously stated, Kenya, Tanzania and Uganda are more established wildlife tourism destinations with renowned natural attributes (e.g. the Serengeti / Mara ecosystem, Mount Kilimanjaro, the mountain gorillas etc.) supported by more developed tourism infrastructures, therefore, arguably investment into the tourism sector is more diluted.
- **Ethiopia**: A clear correlation is shown between visitor exports and investment in the tourism sector. This suggests that tourists are spending more as investment in the sector increases, a trend likely to result from a greater willingness to spend money on better infrastructure, and the ability of those infrastructures to command higher prices.
ANNEX C: TOURISM DEVELOPMENT CONTEXT – KENYA

This Part analyses Kenya’s national tourism policy framework and considers the trends which have characterised the country’s tourism industry in recent years, in order to then place Laikipia within this context. The current security situation and the potential impact of the resulting lack of confidence in Kenya as a destination are also discussed in Part 8.

1.1 NATIONAL POLICY FRAMEWORK

1.1.1 VISION 2030

Kenya’s national economic development strategy, Vision 2030, calls for significant investment in tourism. The Vision is based on three pillars: economic, social and political. The economic development programme aims to achieve an average Gross Domestic Product (GDP) growth rate of 10% and prioritises six economic sectors, including tourism. The three strategic goals for tourism are:

- To quadruple tourism’s contribution to GDP to over Ksh 200 billion;
- To have increased international visitors from 1.6 million in 2006 to 3 million by 2012 (targets for the next development period to 2017 are presently being reviewed) and increase average spend per visitor from Ksh 40,000 to Ksh 70,000;
- To increase hotel beds from 40,000 to 65,000 with an emphasis on high quality service.

Tourism ‘flagship’ projects include:

- Develop 3 resort cities (Isiolo is intended to be one, with proximity to Laikipia);
- A ‘premium parks initiative’: which will provide more expensive tourism experiences in popular destinations (e.g. Maasai Mara and Nakuru).
- An ‘under-utilised parks initiative’: which aims to promote and upgrade the standards of attractive but seldom visited parks;
- A ‘niche products initiative’: which will provide 3,000 additional beds in higher-cost accommodations for tourists interested in cultural and eco-tourism, as well as water-based sports and related activities;
- Certification of 1,000 home-stay sites to promote cultural tourism in Kenyan homes;
• A ‘business visitors initiative’: aiming to attract five additional international hotels to Nairobi, Mombasa and Kisumu, and also to leverage Isiolo as new high-end destination.

1.1.2 National Tourism Policy

Kenya’s current national tourism policy framework, in particular the 2011 Tourism Act, is primarily focused upon restructuring the national administrative organs of tourism, however the following aspects are particularly relevant to Laikipia:

• Tourism product diversification to include eco-tourism and community-based products;
• Provision of incentives by Government for investment in tourism products and services;
• Development and implementation of quality standards (coordinated by the Tourism Regulatory Authority) and encouragement of self-regulating umbrella associations;
• Incentives for investment in renewable sources of energy;
• Promotion of public-private partnerships in promotion and marketing;
• Encouragement of domestic and regional tourism.

1.2 Kenya’s Tourism Sector: Trends & Market Characteristics

1.1.2: Trends over the past 5 years

The following tables and graphs illustrate the trends which have affected Kenya’s tourism sector in recent years⁸. These are broken down into:

1. International tourist arrivals and tourism expenditures (US$)
2. Tourist arrivals by carrier type
3. All arrivals reason for travel
4. Air arrivals by region of origin
5. Average duration of visit by region of origin

⁸ All statistics provided by Kenya Bureau of Statistics – Source: http://www.knbs.or.ke

Laikipia Tourism Master Plan –2015 - 2025
6. Holiday visitor departures by country of residence
7. Holiday visitor departures by region of residence
8. Business visitor departures by country of residence
9. Business visitor departures by region of residence
10. Kenya hotel rooms available by number of nights
11. Kenya hotel rooms occupancy rate
12. Kenya hotel beds available by number of nights
13. Kenya hotel bed occupancy rate
14. Total visitors to game parks / reserves
15. Game reserves / parks occupied bed nights by East Africa and foreign residents
16. Visitors to game reserves / parks by type
1. International tourist arrivals and tourism expenditures (US$) 2009 - 2012

![International tourist arrivals and tourism expenditures graph](Image)
2. Tourist arrivals by carrier type

![Graph showing tourist arrivals by carrier type]

3. All arrivals reason for travel

![Graph showing all arrivals reason for travel]

Laikipia Tourism Master Plan –2015 - 2025
4. Air arrivals by region of origin

![Air arrivals by region of origin graph](image)

5. Average duration of visit by region of origin

![Average duration of visit by region of origin graph](image)
6. Holiday visitors by country of residence

7. Holiday visitors by region of residence
8. Business visitors by country of residence

[Diagram showing business visitors by country of residence from 2010 to 2013]
9. Business visitor departures by region of residence

![Business visitor departures by region of residence](image-url)
10. Kenya hotel rooms available by number of nights

![Graph showing Kenya hotel rooms available (000's nights)](graph)

- Nairobi high class
- Nairobi other
- Coastal beach
- Coastal other
- Coastal hinterland
- Maasai land
- Nyanza Basin
- Western region
- Central region
- Northern region
11. Kenya hotel rooms occupancy rate
12. Kenya hotel beds available by number of nights

![Graph showing hotel beds available by number of nights in Kenya](image-url)
13. Kenya hotel bed occupancy rate

![Kenya hotel bed occupancy rate graph]

14. Total visitors to game parks / reserves

![Total visitors to game parks / reserves graph]
15. Parks / Reserves occupied bed nights by East Africa and foreign residents

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16. Visitors to Reserves / Parks by type

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1.1.2: 2014 Situation Analysis

The key points emerging from analysis of available 2014 information are as follows:

- **GDP: Direct contribution:** The direct contribution of Travel & Tourism to Kenya’s GDP was KES220.6bn (4.1% of total GDP) in 2014.

- **GDP: Total contribution:** The total contribution of Travel & Tourism to GDP was KES561.8bn (10.5% of GDP) in 2014.

- **Employment: Direct contribution:** In 2014 Travel & Tourism directly supported 206,500 jobs (3.5% of total employment).

- **Employment: Total contribution:** In 2014, the total contribution of Travel & Tourism to employment, including jobs indirectly supported by the industry, was 9.2% of total employment (543,500 jobs).

- **Visitor exports:** Visitor exports generated KES160.1bn (18.3% of total exports) in 2014.

- **Investment:** Travel & Tourism investment in 2014 was KES69.3bn, or 6.4% of total investment.

**Overall Sector Performance**

2014 was a particularly challenging year for the tourism sector, evidenced by a 14.6% decline in the sector’s performance in the 3rd quarter of the year, worsening from a 3.9% decline during a similar period in 2013 from the previous year (2012) performance. Although accurate figures for all indicators are not available, 2012 in turn was understood to be significantly down in turn on 2011 performance. With the apparently worsening security situation and anecdotal evidence from industry operators in early 2015, the sector could potentially be up to 50-60% down on the most recent 2011 high by the end of this year.

**National Government Responses**

The Government of Kenya has noted widespread concern across the industry at the introduction of VAT on tourism services (including conservation fees), which has pushed up

\[\text{Source: http://www.knbs.org.ke}\]
costs across the tourism value chain and therefore to tourists, placing Kenya at a competitive disadvantage in the region.

The Government has however introduced the ‘Tourism Stimulus Package’, whereby the President announced a raft of measures including revocation of the circular that prohibited government agencies from holding meetings in privately owned hotels; tax deduction for employers to pay for employees to holiday in Kenya; reduced Kenya Wildlife Service premium parks entry fees to $80 for international visitors and Sh1000 for domestic visitors; and 40% and 10% reduction in landing fees at Malindi and Mombasa airports for international and local flights respectively in a bid to increase arrivals to the Coast.

The Single Tourist Visa: Launched in February by the three partner states (Uganda, Kenya and Rwanda), this seeks to increase the region’s competitiveness with superior multi-country packages and at a fee of US$100 with validity of 90 days. Given that very few tourists are likely to combine all three destinations, this seems unlikely to produce value (a visitor to two countries, Kenya and Rwanda, would pay $80 in total on normal visa rates ($50 for Kenya and $30 for Rwanda)).

Hotel Industry

Kenya’s hotel market declined in recent years, falling 6.6% in 2012 with an additional drop of 2.6% in 201310 and 2014 expected to be even lower. Concerns about terrorism led several countries, including the United States, the United Kingdom and Germany, to issue travel alerts that have discouraged people from visiting Kenya.

Domestic Tourism

Rising incomes and an expanding middle class are understood to be boosting domestic tourism, although reliable statistics are difficult to obtain.

New Markets

Evidence of growth from new source markets is also difficult to obtain. Kenya is attracting increasing visitors from India and China, with growing trade between Kenya and China in particular responsible for the increase.

10 Source: Price Waterhouse Coopers - http://www.pwc.co.za
1.3: The Impact of Terrorism on Kenya’s Tourism Outlook

The present market conditions are felt by many tourism operators to represent the most challenging operating environment ever experienced by Kenya’s tourism sector. The situation has been poor since 2008, when Kenya’s elections led to widespread violence, and as noted above, has deteriorated further still since 2012 because of increased insecurity in the country. Indications from the tourism operators in Kenya in general are that, on average, occupancy levels are down between 30-60% on the most recent high occupancy period in 2011. Laikipia tourism planning will need to reflect these challenging circumstances and the likely prospect of a sustained downturn in international tourism for several years.
There are a wide variety of stakeholders in Laikipia with a vested interest in the success of the County’s tourism industry. For the purpose of carrying out a structured analysis of stakeholder needs and ambitions, the Master Plan development process has grouped stakeholders into the following groups:

- **Operators** of tourism (the operators of tourism products in Laikipia – primarily hotels, lodges, camps, guiding services and transport providers);
- **Providers** of tourism (the providers of visitors to Laikipia being primarily domestic and international tour operators and other visitor generators such as web portals and tourism media);
- **Beneficiaries** of tourism being the wider Laikipia business community (whose businesses are boosted by tourism spending), conservation area managers (whose land is conserved in part through revenues from tourism), and local communities (who benefit from employment and tourism related philanthropy for projects such as schools and clinics).

The table below lists the various responses received during a stakeholder interview process, which was carried out by the Laikipia County Tourism Task Force appointed consultants with support from LWF during late 2013 and early 2014. This included in-person meetings or telephone conversations with most of the above listed tourism businesses around a series of simple questions.

Many of the views summarised below were expressed repeatedly by different stakeholders, but are listed only once. The outcomes of this stakeholder consultation process, and of further County stakeholder consultation exercises in 2015, are captured within the County Government’s strategic commitments which are outlined later in this Master Plan.
Question 1. **What are your views on Kenyan tourism in general at the present time?**

Answers Received:

- Kenya is not marketed well at present. The national tourism authorities are not doing enough.
- Botswana and Namibia, by comparison, are far better promoted and it is easier to travel within those countries.
- Tourism product has declined in Kenya over the past 10 years, due to loss of wildlife and nature primarily but also due to costs of operation in Kenya whereby Kenya is no longer price competitive.
- Local/domestic tourism is growing in Kenya.
- There is more appetite for spending money among the local market.
- The Westgate attack has negatively affected international tourism but not local tourism.
- Security outlook and perceptions are going to be very challenging for international tourism in Kenya.
- Kenya’s political context is equally going to be difficult for tourism development: uncertainty for investment.
- Other destinations in Africa are increasingly competitive: so too are global destinations (someone might choose between Peru and Kenya, for example, when choosing a wildlife holiday).
- Kenya is a ‘wait and see’ destination at present. International tourists would still like to come here, but are waiting to see how the security and political situation will evolve.
- The internet and related booking patterns are reducing margins in tourism: many operators are being forced to offer lower prices in order to compete.
- KTB is not doing enough – it is in poor organizational status.
KATO is stronger: it is well connected with the private sector. However it needs to encourage stronger liaison between private sector and Government.

KTF is very important.

Introduction of VAT on conservation fees has had a major negative impact. Kenya is less price competitive than other countries now.

Booking patterns are changing – international visitors are doing much more internet research into the product and are using agents simply for the benefit of their licenses and insurances. It is therefore very important for lodges/camps and individual tourism experiences to have strong marketing materials.

Kenya would benefit from direct flights from the USA.

Question 2. What are your views on Laikipia as a tourism destination presently?

Answers Received:

- Scenery and wildlife are the main attractions of Laikipia.
- Laikipia is well branded as a destination in comparison to other regions of Kenya – but more can be done.
- Laikipia has very creative and talented tourism operators when compared with other parts of Kenya/Africa.
- Distance from Nairobi is a challenge for the domestic market.
- Scheduled flights are good, but they involve many stops sometimes. Air charter is expensive.
- The current tourism offering is not very accessible for the local/domestic market.
- The higher end lodges do offer special rates for the domestic market, but these are usually in the low season only (although this is changing as international tourism is slowing down).
- The UK market has the strongest awareness of Laikipia as a destination.
Laikipia needs more lower priced lodges and campsites.

Serena (Sweetwaters) at Ol Pejeta is the most accessible wildlife focused tourism experience for the domestic market in Laikipia – it is affordably priced and accessible for families.

The fixed lodge-based model is difficult for specialist tour operators who wish to tailor their product towards their clients.

It is hard to find experiences which are affordable for younger people (both international and domestic markets).

Laikipia has lost momentum in marketing terms.

The powerline across Laikipia will have a major negative effect on tourism in many parts of the county.

**Question 3. What would you say are going to be the main opportunities for tourism in Laikipia in future?**

**Answers Received:**

- An emphasis should be placed on developing a network of private campsites and simpler, semi-permanent facilities with carefully zoned areas, rather than more expensive and permanent lodges.

- Tourists are increasingly short of time – they will increasingly pick one destination (e.g. Laikipia) in future.

- Growth opportunity is in the mid market level – more affordable tourism experiences are needed.

- More emphasis on self-catering properties (both for domestic and international market).

- More emphasis on moving through the area (on foot, horse-riding, by 4WD vehicle), keeping the landscape wild and open – rather than closing it off into defined conservancies and developing many more lodges.
The ability to offer traversing rights across various properties (under an appropriate fee structure) is very important.

Self-drive tourism: routes, designated campsites etc. Safety especially important for self-drive visitors.

More adventure/outdoor activities tourism – mountain biking, canyoning, climbing.

Opportunities for schools groups / corporate adventures.

Tourism in private homes – continuation of bush homes concept.

Community to community walking experiences: focusing upon some of the more marginal areas to develop tourism and links with nature – network of simple community guesthouses (perhaps following old cattle routes).

Cultural tourism opportunities – creative, sensitive.

Conference tourism is an opportunity for Laikipia – probably bigger facilities are required than presently available.

Related service products: selling furniture for lodges/tourists (e.g. furniture from fallen trees from elephant damage), beaded products and other local crafts and products such as honey.

Investors are going to be reluctant to put capital into expensive tourism infrastructure in current economic climate for tourism in Kenya: Laikipia should place emphasis on simpler facilities and lower capital outlays.

Long-term tenure is essential – leases for tourism investors must be secure and long term.

The fact much tourism is on private land in Laikipia is good from the perspective of securing long-term tenure for investment.

We need to explore more opportunities relating to scenery, culture and adventure tourism.

Make Nanyuki airport an international customs clearing point.
Laikipia has great opportunities for family travel – it needs more affordable accommodation (self catering, guesthouses near wildlife conservancies/reserves).

Weekend visitors from Nairobi are a major opportunity.

NGO / development and professional workers for town hotels – including conferences.

Students, universities, research focused tourism.

Integrated wildlife and cattle is an attraction of Laikipia – you can’t see this in many other parts of Africa. Holistic grazing management is important therefore for tourism.

Mount Kenya climbing has much more potential when compared with Kilimanjaro tourism volumes.

Wider range of tourism activities possible on private land as compared with national parks and reserves: walking, night activities etc.

Presence of rare and charismatic species such as wild dogs is a major advantage.

Laikipia needs imaginative systems to capture day visitors – better links between town hotels and wildlife conservancies.

Use of the railway line in future for domestic tourism – Nanyuki is famous in Kenya as being the end of the railway line.

**Question 4.** *How important do you feel nature and wildlife are for tourism in Laikipia?*

*Answers Received (every respondent answered positively to this question):*

- Clients are looking for an experience in nature.
- Clients are looking for tourism experiences which support conservation and communities.
- Laikipia should develop more creative tourism product opportunities using wildlife – hides, camera traps, research related tourism activities etc.
Perhaps develop a wildlife orphanage in Laikipia – if the conservation context would support this.

When one compares tourism with mining and other extractive industries, wildlife can be considered as a renewable, self-sustaining resource – if given space.

Focus conservation efforts upon the marginal / community areas in order to extend the wild and natural feel of the area.

Wildlife is a very powerful way of bringing in philanthropic investment into Laikipia: people come to experience wildlife and then also end up supporting schools, clinics etc.

**Question 5. What do you think the County Government can do to support tourism in Laikipia?**

*Answers Received:*

- The County Government has not yet seriously engaged with the industry.
- Private sector should be able to provide views on policy development. Consultation necessary.
- Planning and zoning for tourism are very important.
- Investment incentives: Kenyans need to be able to invest in tourism with incentives and lower costs of capital.
- A large amount of tourism in Kenya is operated by unlicensed businesses. The County Government (and national government) should address this because this undermines the efforts of properly licensed businesses.
- VAT and income tax are high in comparison with other African countries. Incentives could be provided to the industry.
- County Government needs to create an enabling investment and operating environment for tourism in Laikipia.
- Develop system for assessing visitor numbers and categories.
➢ Address issues such as the powerline, which is going to have a very negative effect on tourism in Laikipia. Also the proposed dam on the Ewaso Nyiro river.

➢ Address the issue of land rates. If these are too high, it will mean landowners cannot afford to offer tourism.

➢ Support wildlife conservation efforts – this is the basis for tourism in Laikipia in future.

➢ Maintain security – this is essential for tourism.

➢ Roads and other infrastructure – main Nairobi to Nanyuki road must be in good condition. Also grading of key local access roads for tourism.

➢ Lobby for reduction of VAT on conservation fees – this is having a major negative impact on international tourism because other countries do not levy VAT on conservation fees.

➢ Create investment incentives for tourism.

➢ Give landowners who conserve wildlife a tax break – as this saves Government costs and supports the tourism sector.

➢ County Government must recognize the success of what is already there and support this to grow – allowing the private sector to develop and lead tourism in Laikipia.

➢ Work permits are going to be challenging – both for skilled international people working in tourism and for those who are doing research which support the conservation resource. County Government could support this issue.

➢ County Government and partners should facilitate more private sector cooperation – although the private sector themselves can do more too.

➢ County Government can support destination tourism marketing.

➢ Partners such as LWF could help to facilitate the relationship between the private sector and County Government.

➢ Build skills and capacity – especially new businesses and those businesses which are targeting new markets.
 Support education among other County Government departments and other non-tourism stakeholders on the values and needs of the tourism sector.

 Develop a strong system of data collection and tourism statistics analysis which will inform County Government tourism policy and private sector strategy.

 Education programmes are important – for skills creation, for nature conservation and because tourists like to see education taking place.
Annex E: LAIKIPIA TOURISM DEVELOPMENT OPPORTUNITIES

The World Bank’s ‘Tourism in Africa’ report explains that “In today’s globalized market, every tourism product competes with every other at its price point throughout the world. Although the prime decision maker is the individual traveller, the size of the flow of tourists to a particular destination is to a considerable extent determined by the world tourism industry, represented by tour operators, travel agents and transport services in the countries of tourist origin. Destinations can influence these external industry managers through effective and continuing promotion and marketing campaigns but will be successful only if there is a high-quality product to sell that is competitive in value and not just in price”.

The below tourism product development recommendations (and the associated regulation and tourism management recommendations which follow in Part 9) are divided broadly into:

1) Evolving, adapting and strengthening existing products, and
2) Developing new products to suit current and future market realities.

1.1: Evolution and Adaptation of Existing Products and Markets

The 2007 Laikipia Tourism Strategy developed by LWF suggested that Laikipia’s tourism success has been driven by a strong emphasis on “creativity, quality, value, involvement of traditional people and cultures, and active protection of the environment and its wildlife” – thereby setting it apart from other destinations not just within Kenya but right across the world. These sentiments remain wholly relevant today. Although market conditions are extremely challenging (perhaps as challenging as they have ever been given that there is no clear end in sight with respect to Kenya’s present security situation), it must be remembered that this is a context driven by circumstances outwith Laikipia and outwith the control of Laikipians and at such time as the security context returns to normality, much of what has worked for Laikipia in the past will continue to be relevant.

It is however certainly going to be necessary to evolve and adapt the products which were developed with such apparent success prior to 2008 in order to navigate through the external market challenges ahead. Only the best and most innovative tourism businesses are going to succeed and while the general feeling from most Laikipia tourism businesses is one of deep concern for the future, encouragingly, there is anecdotal evidence that some Laikipia tourism businesses are continuing to sustain good occupancies on the strength of their customer service and their creativity. Carefully targeted promotional efforts, for many an emphasis on
the domestic market and in several cases an innovative approach to integrating wildlife conservation and tourism (see Part 11) is resulting in increased levels of business.

The general characteristics of the ‘existing’ products which should be focused upon are summarised below:

1.1.1: Lodges/Camps focused upon wildlife and nature

This is the primary form of tourism in Laikipia as has been described already in the Parts above. The *source markets* for such lodges/camps are genuinely global nowadays, although the primary source markets continue to be Europe and North America in terms of volume of tourists and level of visitor spending.

The *requirements* of these visitor markets include good standard accommodation facilities which are constructed in an ecologically sensitive manner. A strong emphasis on high quality guiding, creative activities, high quality customer service and good food is essential. Kenya’s security situation has affected this sector in particular as such facilities require substantial occupancies (at least 35%) in order to be economically viable. Access by scheduled air service or road is also important as these facilities are not usually commercially viable on the basis of private air charter access alone.

In addition to improving security, the primary steps which must be taken in order to stimulate this sector are to properly plan and zone tourism use areas in each region of Laikipia where tourism seems a realistic possibility. Because the product of Laikipia will continue to focus principally upon wildlife experience, there is a need for extensive and creative interaction between the research and monitoring functions within Laikipia and the tourism sector in order to optimise opportunities for all concerned.

**SUMMARY:**

*Short term:* In the short term, existing tourism businesses in this sector must innovate and target new and niche markets and carefully manage costs. The public sector must be supportive and minimise fiscal and other regulatory burdens. Although the products are aimed principally at the overseas market, these facilities will also need to focus extensively on the domestic market (see below).

*Long term:* More significant development of this sector will be possible if and when Kenya’s security situation improves. This will require investment of time and expertise in a tourism
zoning plan for Laikipia, an outline for which is detailed later within this Master Plan, however which will need further elaboration. Such a zoning plan is important in order to ensure that inappropriate infrastructure development in key wildlife tourism areas is avoided and for different volume/use tourism areas targeting different and complementary markets to be developed in separate parts of Laikipia.

1.1.2: WALKING, TREKKING AND MOUNTAIN BIKING

Laikipia offers fantastic walking prospects and trekking on Mount Kenya is a significantly underutilised tourism resource when placed in context of the popularity of trekking in global terms. The County offers some of the best mountain biking prospects in the world, with superb networks of trails and variation in scenery. The source markets for walking/trekking and mountain biking are increasingly global, however the primary markets will be Europe, Australasia and North America.

The requirements of this market are primarily centred upon the ability for operators to access multiple areas of land within Laikipia and to undertake varied and interesting walking/trekking, featuring wildlife and cultural aspects where possible. An advantage of this market is that they do not necessarily need to be guaranteed fantastic wildlife experiences – although this adds value if possible. Guiding is of foremost importance and it is also essential to have good, safe transport and reasonable standard accommodation at either end of the walking/trekking experience (if camping).

Networks of imaginative cabins or guesthouses along key walking routes would help to facilitate this sector. These could potentially be operated in partnership with local communities. One Laikipia tourism stakeholder interviewed suggested that a network of walking trails linking the old ‘outspan’ areas (many of which are understood to be government owned and as such could be made available for County supported tourism) be developed, involving relevant local communities in hosting visitors.

These experiences have been very successfully developed within Laikipia by operators such as Rift Valley Adventures, who have targeted international schools and work closely with the British Army. Laikipia (when combined with Mount Kenya and the Great Rift Valley) also offers tremendous potential for expansion of ‘adventure racing’ tourism products (see further below) and once again this is an opportunity to bring tourism development opportunity to new conservation areas – in particular communities.
SUMMARY:

Short term: The opportunity to grow this sector is immediate, with limited infrastructure investment required, however strengthening this sector will again be subject to an improved security situation.

Long term: This sector should play a key role as Laikipia’s tourism sector grows – again this sector will be valuable in terms of developing community tourism partnerships and bringing new areas of Laikipia into economic use through wildlife related experiences.

1.1.3: Mobile Camping Wildlife Safaris

This market has also suffered due to Kenya’s security situation and also the rising costs of offering such experiences in Kenya. However, this form of tourism offers flexibility and the ability to adapt to include new conservation areas (including community conservancies) and it is certainly the most ecologically sensitive form of tourism possible in Laikipia. The source markets for mobile camping safaris are again primarily North America and Europe, where mature and adventurous wildlife tourism markets exist and where the operators of mobile camping experiences have developed strong promotional links and customer bases over the years.

The requirements of this market are primarily focused upon access to wildlife areas, smooth logistics and a basic level of comfort in the camps which are set up and moved during the course of itineraries by the operator. Again, this type of tourism will benefit from being managed carefully together with wildlife monitoring and research programmes.

SUMMARY:

Short term: This is an important sector for support and investment.

Long term: This sector will continue to play an important role in Laikipia and represents a key form of tourism for developing new community wildlife areas.
1.1.4: Self-Catering

According to the stakeholder consultation process, this market is presently underserved in Laikipia. There is strong interest from the domestic market – in particular from families – looking to spend time together in Laikipia and who would prefer to have flexible mealtimes and whose budget does not extend to normal hotel or lodge accommodation. There is also an emerging interest in this kind of product from international market – again, particularly from families. This also leads to opportunity for reliable self-drive safari vehicle providers as these clients will also seek to hire their own vehicle while in Kenya.

The source markets for self-catering are primarily the expatriate community in Kenya, wealthier families from across Kenyan society, and adventurous international visitors from the rest of Africa (in particular South Africa) and Europe. The requirements of this market are ease of access (given that they are self-driving – although with good maps they will also be willing to travel to remoter areas), access to nature/wildlife and a basic level of comfort in the accommodation facilities. This product will be enhanced if the business owners also offer to provide staff (at least a cook) and can assist with purchase of supplies (for example providing menu ideas and making arrangements with Nanyuki or other urban area based business to prepare shopping orders).

SUMMARY:

Short term: This is an important sector for support and investment.

Long term: This sector will continue to play an important role in Laikipia and represents a key form of tourism for much of Laikipia.

1.2 Development of New Markets

Most of the product types summarised below are not entirely new, but they have not been strongly represented within Laikipia’s product offering so far. Some are a direct response to the current challenges arising from security; others are simply an opportunity to complement the products which already exist in Laikipia.

1.2.1: Domestic Tourism

This is not a new product as such, but represents a market which has not been targeted extensively by many Laikipian tourism businesses. The Nanyuki based hotel businesses
mentioned above are primarily targeting this market and there are a series of new tourism establishments within a 30km radius of Nanyuki which are striving to offer nature-based experiences to the domestic market, leveraging the presence of wildlife areas such as Ol Pejeta and Lolldaiga Conservancy. The wildlife tourism facility which is most focused upon the domestic market in Laikipia is probably Sweetwaters Tented Camp on Ol Pejeta, managed by Serena Hotels.

Experience shows that domestic markets are extremely important in East Africa, particularly in low seasons and in times of political/other crisis where international tourists will generally stay away – such as the present time in Kenya. There is a large international community resident in Nairobi, which is an obvious target market together with more affluent Kenyan citizens. The growing interest in travel from among Kenya’s middle/professional class, who wish to increasingly explore their country, suggests that this market will only continue to grow in importance.

In particular, this market will be interested in short break experiences – for which Laikipia offers excellent possibilities. A key requirement for this market is for new wildlife areas to be made available for affordable access – in particular those closer to Nanyuki. Ol Pejeta has already been mentioned and deserves credit for the manner in which the conservancy actively targets and welcomes a diverse range of market sectors. Lolldaiga Hills, located within 30 minutes of Nanyuki, is also increasingly focused upon tourism and is placing emphasis within its product offerings on the domestic market.

The domestic market again offers potential opportunity for new and existing community wildlife conservancies. The lower slopes of Mount Kenya and collaboration with the Kenya Forest Service will also be important going forward in providing for this market.

SUMMARY:

Short term: This is a particularly important sector for support and investment given the present challenges facing Kenya’s international tourism sector.

Long term: This sector will continue to play an increasingly significant role in Laikipia and represents a key form of tourism for developing new wildlife areas, including community conservation initiatives.
1.2.2: MICE – MEETINGS, INCENTIVE, CONFERENCE AND EXHIBITION TOURISM

This sector, much like the domestic tourism commentary above, is particular important in light of the wider security context affecting international tourism. Other aspects of Kenya’s economy are performing strongly and Laikipia offers tourism opportunities for both the domestic and international business tourism sectors (with security concerns noted with respect to the latter). As other economic sectors develop, the business tourism market will grow further and with the scale of ambition for development in Kenya in general terms (as expressed in Vision 2030), the professional sector will also progress.

Laikipia’s appeal as a business tourism destination also lies primarily with its natural and wildlife attributes. Business and conference travellers increasingly want to ‘break out’ from their meetings to do something different for half a day or so, and Laikipia offers endless activity possibilities and a backdrop of spectacular scenery. Nanyuki and its surrounds are probably the most obvious locations for business tourism development (with businesses such as the Sportsmans Arms, Lions Court Lodge and the Fairmont Mount Kenya Safari Club focusing strongly on this sector already), however more accessible tourism facilities elsewhere in Laikipia may also increasingly target this sector – in particular conference facilities which provide access to Laupilia’s nature/wildlife on their doorstep.

The 2014 World Bank report on tourism in Africa highlights Kenya’s recent investment in business and conference tourism and the requirements of this market are a good international standard of accommodation and restaurant facilities, communications facilities (especially internet and business centre facilities) and excellent customer service. The source markets for these forms of tourism will depend upon the nature of business being conducted and the development sector partnerships which are formed with regard to north and central Kenya (NGOs and government agencies are also a key target market within this sector).

In order to realise the opportunities presented by this market it will be important to support the development of new facilities (and improvement of existing facilities) for the many business people who will look for high standard accommodation. However, equally, it will be important to also cater for less affluent business people working in other sectors of the economy and therefore to support the development, in time, of further good value middle quality facilities.
SUMMARY:

Short term: This is a key sector for support and investment.

Long term: This sector will continue to play an important role as Kenya’s business sector grows.

1.2.3: Other African Countries

Other African countries are going to prove increasingly important for Laikipia. The Kenya Tourism Board has recently launched an initiative which seeks to target South Africa in particular, recognising South Africa as one of the continent’s largest economies and a nation whose citizens are likely to better understand the nuances of Kenya’s security situation more than other more traditional European and North American markets (and thereby understands that whilst there may be security challenges in certain parts of Kenya, a specific destination such as Laikipia remains almost perfectly safe for travel). Nigeria and countries with similarly expanding economies such as Ethiopia, Rwanda and Uganda are going to become increasingly relevant for Kenya’s tourism sector.

1.3 New and Expanded Niche Products

The following sectors were highlighted by various Laikipia tourism stakeholders during the interview process as offering scope for greater product development and diversification.

1.3.1: Overland Vehicle Tourism

While in the short term, this market will be affected by security issues in Kenya, it is likely to prove more resilient than some of the core markets associated with wildlife tourism camps and lodges. ‘Overlanders’ are tourists who travel with specialist companies on long-distance itineraries using specialist 4-wheel drive buses which also carry camping equipment. They are an important market for early stage wildlife areas and community conservancies as they are often the ‘pioneers’ of new destinations and they typically require no more than designated campsites in natural areas with water and firewood provided, and they are willing to pay conservancy/reserve entrance fees.
The source markets for Overlanders are primarily Europe and North America, with important sub-markets in Australia, New Zealand, South Africa and New Zealand. The requirements of this market are fairly basic, in that all they typically require are reasonable roads (not necessary sealed, but passable in dry season), secure access to camping areas and a sense of adventure. East Africa is a key market for Overlanders and, as northern Kenya also develops for tourism, there is scope to create a specific circuit in north-central Kenya for Overlanders with Laikipia as a key component.

**SUMMARY:**

**Short term:** This is an immediate opportunity with limited investment required, however it will be subject to an improved security situation.

**Long term:** This sector will continue to play an important role as Laikipia’s tourism sector grows and is likely to be one of the earliest sectors to explore new wildlife areas and community conservancies.

### 1.3.2: Backpackers

This is a small but significant element of tourism in other parts of Africa, focusing upon (typically) young people travelling on a low cost basis to sites of interest. This market is particularly established in Uganda, for example. While they will usually favour lower priced accommodation, this market increasingly includes slightly older travellers (aged 25-40) who have previously been in employment and who are taking career breaks.

They will also wish to include (and be prepared to pay for) occasional more expensive tourism experiences. By way of example, one of the main customer groups for gorilla tourism in Uganda is the backpacker market, who will normally spend in the region of US$50 per day on accommodation, transport and food during the bulk of their time in Uganda, but will then spend up to US$750 on a permit to watch gorillas during a single day.

The source markets for backpackers are again primarily Europe and North America, however there are also important sub-markets in Australia, New Zealand, South Africa and Israel. The requirements of this market are fairly basic, in that travelling on local (as opposed to normal tourism standard) transport is part of the experience, and they are usually fairly intrepid and well-informed – and as such, they are probably likely to be more ‘security resilient’ than other market sectors. They tend to look for specific ‘backpacker’ accommodations and elements of
any ‘circuit’ which is developed for backpackers in Laikipia will revolve around the location of creative backpacker focused accommodations.

Such a ‘circuit’ might be feasible to create by a single entrepreneur who develops accommodations together with a transport service between certain locations. There are several examples such as the ‘Green Tortoise’ bus service in western USA and the many backpacker focused transport services in destinations such as Scotland and New Zealand, where backpackers can get on and off the transport service and stay for longer in particular destinations should they wish (as opposed to being on an ‘organised’ tour which many backpackers do not wish). Naturally, the character of Laikipia is very different as a destination to these examples, but the principles of such an integrated transport and accommodation service are the same and it will require a very reliable and professional operation, with strong logistical capability and systems.

**SUMMARY:**

*Short term:* This is an immediate opportunity with limited investment required, however it will once again be subject to at least a partially improved security situation.

*Long term:* This sector will continue to play an important role as Kenya’s tourism sector grows and once again offers opportunities for developing new wildlife areas and community conservancies.

1.3.3: **Adventure Racing (including Marathons) and Sports Tourism**

This is a large and rapidly growing sector of tourism around the world. In Europe there is a large adventure racing sector, with a series of events across the continent for serious athletes and many more for amateurs, families and children. Laikipia offers superb possibilities and this is already evidenced by the popularity of events such as the ‘Safaricom Marathon’ held every June on Lewa Wildlife Conservancy and the ‘10 to 4’ organised by the Mount Kenya Trust every February. Multi-discipline events such as ‘Triathlons’ are increasingly popular – and there are many specialist travel companies now focusing solely on this sector.

The *source markets* for this sector are many. Adventure racing is and will become increasingly popular within Kenya itself and strong growth can be expected within the domestic market. In South Africa, the sector is very popular and if creative events are organised over several days (in order to make the effort and expense of travel worthwhile) then this will be a key market. The rest of the world, including in particular Europe,
Australasia and North America (where adventure racing is very popular) are also very important markets.

The requirements of this market are focused primarily on the skill and experience of the event organisers. This will only be a relevant sector for Laikipia if some very good businesses focus on providing creative and well promoted events, which gain a reputation for safety and high quality organisation. This will be especially the case when targeting international markets. The accommodation requirements of this market sector are fairly basic, in that they are often content to stay in tented accommodations. The families of participants will often accompany them for the weekend or a longer holidays and therefore the availability of other forms of accommodation (such as lodges, camps, small hotels and self-catering accommodations) will also be important.

The wider category of ‘Sports Tourism’ is also relevant, which would involve careful consideration of what would differentiate Laikipia from other destinations within East Africa. The altitude and agreeable climate of Laikipia would lend itself to training camps for international athletes and cyclists, for example.

**SUMMARY:**

*Short term:* This is an immediate opportunity with limited investment required, however the international markets will once again be subject to at least a partially improved security situation.

*Long term:* This sector will continue to play an important role as Kenya’s tourism sector grows and once again offers opportunities for developing new wildlife areas and community conservancies.

1.3.4: **Agricultural Tourism**

Several stakeholders have mentioned the possibility of ‘agricultural tourism’, which would involve professional visitors (or indeed simply tourists who are interested in spending time in a farm environment) visiting Laikipia. Product development would have to focus upon the attributes which make Laikipia different from other destinations in East Africa and indeed around the world. This could include some of the ranches which specialise in rare breeds of cattle, or the flower farms around the base of Mount Kenya. Small-scale farm practices in Laikipia may be of interest to certain visitors, perhaps when combined with homestays (see below).
The *source markets* for this sector are potentially global. There are various specialist agricultural tourism operators, focused upon farmers around the world who are interested to experience farming environments in other places.

The *requirements* of this market would be privileged access to the operations of farms and ranches in Laikipia, which would need the full cooperation of the relevant landowners and farmers. Their accommodation requirements would vary according to budget but would have to be of at least a medium standard for international visitors and would ideally include accommodations on the farms themselves.

**SUMMARY:**

**Short term:** This is an immediate opportunity with limited investment required, and international markets may be less influenced by the security situation.

**Long term:** This sector is unlikely to be a major component of Laikipia’s tourism offering, however it could become a viable niche if developed by skilled operators.

**1.3.5: Home Stays**

As noted above, Kenya’s Vision 2030 highlights the opportunity for ‘homestays’ which has become a significant tourism sector in other parts of the world where the culture of local people is interesting to visitors. Laikipia’s cultural attributes are highly regarded (including in particular Twala and Yaaku) and with the appropriate training, certain communities within Laikipia could benefit from this form of tourism.

Product ideas which stakeholders have raised in consultation have included walking from village to village in the pastoralist areas of the Laikipia plateau, in an experience which is akin to the current range of walking safaris on offer by professional tourism operators. Additionally, some of the farming communities (for example on the slopes of Mount Kenya or towards Rumuruti and Nyahururu) could develop simple homestay accommodations for visitors.

The *source markets* for this sector are again potentially global. Homestay tourism is well established in South America and Asia, where visitors from around the world come to experience fascinating cultures such as in Himalayan farming villages or fishing villages along the tributaries of the Amazon river. It may be that in future, Kenyans themselves will be...
interested to travel in this way and to experience other parts of their own country, however this seems likely to be a longer term trend with most Kenyans favouring more conventional tourism experiences in the short term.

The requirements of this market will depend upon whether there will be wildlife experiences involved, in which case safety becomes paramount. Walking itineraries must be carried out in areas where tourists are unlikely to encounter dangerous wildlife – and if they are, the guides must be very well trained. The accommodation can either be the homes of local people, or, as is increasingly the case in other parts of the world, local people are encouraged to design and build simple guesthouses in the style of their traditional houses. Accessing markets and customers is a usual challenge for homestay tourism around the world and in recent years professional businesses have been developed who work in partnership with local communities to train their members in hospitality and to provide a professional marketing service for their products.

**SUMMARY:**

**Short term:** This is an immediate opportunity with limited investment required, and with strong marketing international markets may be less influenced by the security situation.

**Long term:** This sector could become a viable niche if local people benefit from training and form partnerships with skilled operators (including other Laikipia tourism businesses) who can help them to access markets.

**1.3.6: Key Themes Emerging**

In the view of the Laikipia Tourism Task Force, the following key themes are critical to tourism growth in Laikipia, and all should be developed with sustainability foremost in mind:

- Kenyan middle class tourism development - investments in the weekend sector of tourism where the County provides a safe, outdoor, comfortable and adventurous set of visitor opportunities;

- Kenyan/International Conference Tourism - with visitor opportunities for delegates to experience Laikipia’s nature, wildlife and culture;

- Conservation Education Tourism - marketing Laikipia as a destination for formal conservation and environmental education;
High profile wildlife tourism - a focus on the endangered and threatened species of Laikipia and the citizen science projects that can support this;

Cultural tourism - development of a set of tourism products that respect and complement Laikipia’s Maa speaking/Yaku speaking residents; and provide them with better opportunities for sound and productive tourism development;

Exclusive/high-end and international focused wildlife and landscape management focused visitor destinations and related activity development.

These key themes must underpin investment, promotion and marketing opportunities for the next 10 years for Laikipia. They support the niche that Laikipia fills within the wider Kenyan tourism sector.
Annex F – GLOBAL SUSTAINABLE TOURISM COUNCIL STANDARDS

GLOBAL SUSTAINABLE TOURISM CRITERIA FOR DESTINATIONS

A. Demonstrate sustainable destination management

- A1 Sustainable destination strategy: The destination has established and is implementing a multi-year destination strategy that is publicly available, is suited to its scale, which considers environmental, economic, social, cultural, quality, health, and safety, and aesthetic issues, and was developed with public participation.

- A2 Destination management organization: The destination has an effective organization, department, group, or committee responsible for a coordinated approach to sustainable tourism, with involvement by the private sector and public sector. This group is suited to the size and scale of the destination, and has defined responsibilities, oversight, and implementation capability for the management of environmental, economic, social, and cultural issues. This group's activities are appropriately funded.

- A3 Monitoring: The destination has a system to monitor, publicly report, and respond to environmental, economic, social, cultural, tourism, and human rights issues. The monitoring system is reviewed and evaluated periodically.

- A4 Tourism seasonality management: The destination dedicates resources to mitigate seasonal variability of tourism where appropriate, working to balance the needs of the local economy, community, cultures and environment, to identify year-round tourism opportunities.

- A5 Climate change adaptation: The destination has a system to identify risks and opportunities associated with climate change. This system encourages climate change adaptation strategies for development, siting, design, and management of facilities. The system contributes to the sustainability and resilience of the destination and to public education on climate for both residents and tourists.

- A6 Inventory of tourism assets and attractions: The destination has an up-to-date, publicly available inventory and assessment of its tourism assets and attractions, including natural and cultural sites.

- A7 Planning Regulations: The destination has planning guidelines, regulations and/or policies that require environmental, economic, and social impact assessment and integrate sustainable land use, design, construction, and demolition. The guidelines, regulations and/or policies are designed to protect natural and cultural resources,
were created with local inputs from the public and a thorough review process, are publicly communicated, and are enforced.

- **A8 Access for all**: Where appropriate, sites and facilities, including those of natural and cultural importance, are accessible to all, including persons with disabilities and others who have specific access requirements. Where such sites and facilities are not immediately accessible, access is afforded through the design and implementation of solutions that take into account both the integrity of the site and such reasonable accommodations for persons with access requirements as can be achieved.

- **A9 Property acquisitions**: Laws and regulations regarding property acquisitions exist, are enforced, comply with communal and indigenous rights, ensure public consultation, and do not authorize resettlement without prior informed consent and/or reasonable compensation.

- **A10 Visitor satisfaction**: The destination has a system to monitor and publicly report visitor satisfaction, and, if necessary, to take action to improve visitor satisfaction.

- **A11 Sustainability standards**: The destination has a system to promote sustainability standards for enterprises consistent with the GSTC Criteria. The destination makes publicly available a list of sustainability certified or verified enterprises.

- **A12 Safety and security**: The destination has a system to monitor, prevent, publicly report, and respond to crime, safety, and health hazards.

- **A13 Crisis and emergency management**: The destination has a crisis and emergency response plan that is appropriate to the destination. Key elements are communicated to residents, visitors, and enterprises. The plan establishes procedures and provides resources and training for staff, visitors, and residents, and is updated on a regular basis.

- **A14 Promotion**: Promotion is accurate with regard to the destination and its products, services, and sustainability claims. The promotional messages treat local communities and tourists authentically and respectfully.

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**B. Maximize economic benefits to the host community and minimize negative impacts**

- **B1 Economic monitoring**: The direct and indirect economic contribution of tourism to the destination’s economy is monitored and publicly reported at least annually. To the extent feasible, this should include visitor expenditure, revenue per available room, employment and investment data.

- **B2 Local career opportunities**: The destination’s enterprises provide equal employment, training opportunities, occupational safety, and fair wages for all.

- **B3 Public participation**: The destination has a system that encourages public participation in destination planning and decision making on an ongoing basis.
- B4 Local community opinion: Local communities’ aspirations, concerns, and satisfaction with destination management are regularly monitored, recorded and publicly reported in a timely manner.

- B5 Local access: The destination monitors, protects, and when necessary rehabilitates or restores local community access to natural and cultural sites.

- B6 Tourism awareness and education: The destination provides regular programs to affected communities to enhance their understanding of the opportunities and challenges of tourism, and the importance of sustainability.

- B7 Preventing exploitation: The destination has laws and established practices to prevent commercial, sexual, or any other form of exploitation and harassment of anyone, particularly of children, adolescents, women, and minorities. The laws and established practices are publicly communicated.

- B8 Support for community: The destination has a system to enable and encourage enterprises, visitors, and the public to contribute to community and sustainability initiatives.

- B9 Supporting local entrepreneurs and fair trade: The destination has a system that supports local and small- and medium-sized enterprises, and promotes and develops local sustainable products and fair trade principles that are based on the area’s nature and culture. These may include food and beverages, crafts, performance arts, agricultural products, etc.

c. Maximize benefits to communities, visitors, and culture; minimize negative impacts

- C1 Attraction protection: The destination has a policy and system to evaluate, rehabilitate, and conserve natural and cultural sites, including built heritage (historic and archaeological) and rural and urban scenic views.

- C2 Visitor management: The destination has a visitor management system for attraction sites that includes measures to preserve, protect, and enhance natural and cultural assets.

- C3 Visitor behaviour: The destination has published and provided guidelines for proper visitor behaviour at sensitive sites. Such guidelines are designed to minimize adverse impacts on sensitive sites and strengthen positive visitor behaviours.

- C4 Cultural heritage protection: The destination has laws governing the proper sale, trade, display, or gifting of historical and archaeological artefacts.

- C5 Site interpretation: Accurate interpretive information is provided at natural and cultural sites. The information is culturally appropriate, developed with community collaboration, and communicated in languages pertinent to visitors.

- C6 Intellectual property: The destination has a system to contribute to the protection
and preservation of intellectual property rights of communities and individuals.

D. Maximize benefits to the environment and minimize negative impacts

- **D1 Environmental risks**: The destination has identified environmental risks and has a system in place to address them.
- **D2 Protection of sensitive environments**: The destination has a system to monitor the environmental impact of tourism, conserve habitats, species, and ecosystems, and prevent the introduction of invasive species.
- **D3 Wildlife protection**: The destination has a system to ensure compliance with local, national, and international laws and standards for the harvest or capture, display, and sale of wildlife (including plants and animals).
- **D4 Greenhouse gas emissions**: The destination has a system to encourage enterprises to measure, monitor, minimize, publicly report, and mitigate their greenhouse gas emissions from all aspects of their operation (including emissions from service providers).
- **D5 Energy conservation**: The destination has a system to encourage enterprises to measure, monitor, reduce, and publicly report energy consumption, and reduce reliance on fossil fuels.
- **D6 Water Management**: The destination has a system to encourage enterprises to measure, monitor, reduce, and publicly report water usage.
- **D7 Water security**: The destination has a system to monitor its water resources to ensure that use by enterprises is compatible with the water requirements of the destination community.
- **D8 Water quality**: The destination has a system to monitor drinking and recreational water quality using quality standards. The monitoring results are publicly available, and the destination has a system to respond in a timely manner to water quality issues.
- **D9 Wastewater**: The destination has clear and enforced guidelines in place for the siting, maintenance and testing of discharge from septic tanks and wastewater treatment systems, and ensures wastes are properly treated and reused or released safely with minimal adverse effects to the local population and the environment.
- **D10 Solid waste reduction**: The destination has a system to encourage enterprises to reduce, reuse, and recycle solid waste. Any residual solid waste that is not reused or recycled is disposed of safely and sustainably.
- **D11 Light and noise pollution**: The destination has guidelines and regulations to minimize light and noise pollution. The destination encourages enterprises to follow these guidelines and regulations.
- D12 Low-impact transportation: The destination has a system to increase the use of low-impact transportation, including public transportation and active transportation (e.g., walking and cycling).
A. Demonstrate effective sustainable management.
- A1 The organization has implemented a long-term sustainability management system that is suitable to its reality and scope, and which addresses environmental, social, cultural, economic, quality, health and safety issues.
- A2 The organization is in compliance with all applicable local to international legislation and regulations (including, among others, health, safety, labour and environmental aspects).
- A3 All personnel receive periodic guidance and training regarding their roles and responsibilities with respect to environmental, social, cultural, economic, quality, health and safety issues.
- A4 Customer satisfaction, including sustainability aspects, is measured and corrective action taken.
- A5 Promotional materials are accurate and complete with regard to the organization and its products and services, including sustainability claims. They do not promise more than is being delivered.
- A6 Planning, design, construction, renovation, operation and demolition of buildings and infrastructure:
  o A.6.1 ...comply with zoning requirements and with laws related to [conservancy or protected area]s and heritage consideration.
  o A.6.2 ...respect the natural and cultural heritage surroundings in planning, siting, design and impact assessment.
  o A.6.3 ...use locally appropriate sustainable practices and materials.
  o A.6.4 ...provide access for persons with special needs, where appropriate.
- A7 Land and water rights, and property acquisition are legal, comply with local communal and indigenous rights, including their free, prior and informed consent, and do not require involuntary resettlement.
- A8 Information about and interpretation of the natural surroundings, local culture, and cultural heritage is provided to customers, as well as explaining appropriate behaviour while visiting natural areas, living cultures, and cultural heritage sites.
B. Maximize social and economic benefits to the local community and minimize negative impacts.
- B1 The organization actively supports initiatives for local infrastructure and social community development including, among others, education, training, health and sanitation.
- B2 Local residents are given equal opportunity for employment including in management positions. All employees are equally offered regular training, experience and opportunities for advancement.
- B3 Local services and goods are purchased and offered by the organization, following fair trade principles.
- B4 The organization offers the means for local small entrepreneurs to develop and sell sustainable products that are based on the area’s nature, history and culture (including food and beverages, crafts, performance arts, agricultural products, etc.).
- B5 A documented code of conduct for activities in indigenous and local communities has been developed and implemented with the collaboration and consent of the affected community.
- B6 The organization has implemented a policy against commercial, sexual or any other form of exploitation and harassment, particularly of children, adolescents, women and minorities.
- B7 The organization offers equal employment opportunities to women, local minorities and others, including in management positions, while restraining child labour.
- B8 The international or national legal protection of employees is respected, and employees are paid at least a living wage.
- B9 The activities of the organization do not jeopardize the provision of basic services, such as food, water, energy, healthcare or sanitation, to neighbouring communities.
- B10 Tourism activity does not adversely affect local access to livelihoods, including land and aquatic resource use, rights-of-way, transport and housing.

C. Maximize benefits to cultural heritage and minimize negative impacts.
- C1 The organization follows established guidelines or a code of behaviour for visits to culturally or historically sensitive sites, in order to minimize negative visitor impact and maximize enjoyment.
- C2 Historical and archaeological artefacts are not sold, traded or displayed, except as permitted by local to international law.
- C3 The organization contributes to the protection and preservation of local historical, archaeological, culturally and spiritually important properties and sites, and does not impede access to them by local residents.

- C4 The organization incorporates elements of local art, architecture, or cultural heritage in its operations, design, decoration, food, or shops; while respecting the intellectual property rights of local communities.

D. Maximize benefits to the environment and minimize negative impacts.

- **D1 Conserving resources**
  - D1.1 Purchasing policies favour locally appropriate and ecologically sustainable products, including building materials, capital goods, food, beverages and consumables.
  - D1.2 The purchase and use of disposable and consumable goods is measured and the organization actively seeks ways to reduce their use.
  - D1.3 Energy consumption is measured, sources are indicated, and measures are adopted to minimize overall consumption, and encourage the use of renewable energy.
  - D1.4 Water consumption is measured, sources are indicated, and measures are adopted to minimize overall consumption. Water sourcing is sustainable, and does not adversely affect environmental flows.

- **D2 Reducing pollution**
  - D2.1 Greenhouse gas emissions from all sources controlled by the organization are measured, procedures are implemented to minimize them, and offsetting remaining emissions is encouraged.
  - D2.2 The organization encourages its customers, staff and suppliers to reduce transportation related greenhouse gas emissions.
  - D2.3 Wastewater, including grey water, is effectively treated and is only reused or released safely, with no adverse effects to the local population and the environment.
  - D2.4 Waste is measured, mechanisms are in place to reduce waste, and where reduction is not feasible, to re-use or recycle it. Any residual waste disposal has no adverse effect on the local population and the environment.
  - D2.5 The use of harmful substances, including pesticides, paints, swimming pool disinfectants, and cleaning materials, is minimized, and substituted when available, by innocuous products or processes. All storage, use, handling, and disposal of chemicals are properly managed.
D2.6 The organization implements practices to minimize pollution from noise, light, runoff, erosion, ozone-depleting compounds, and air, water and soil contaminants.

- **D3 Conserving biodiversity, ecosystems, and landscapes**
  - D3.1 Wildlife species are not harvested, consumed, displayed, sold, or traded, except as part of a regulated activity that ensures that their utilization is sustainable, and in compliance with local to international laws.
  - D3.2 No captive wildlife is held, except for properly regulated activities, in compliance with local to international law. Living specimens of protected and wildlife species are only kept by those authorized and suitably equipped to house and care for them humanely.
  - D3.3 The organization takes measures to avoid the introduction of invasive alien species. Native species are used for landscaping and restoration wherever feasible, particularly in natural landscapes.
  - D3.4 The organization supports and contributes to biodiversity conservation, including natural [conservancy or protected area]s and areas of high biodiversity value.
  - D3.5 Interactions with wildlife, taking into account cumulative impacts, do not produce adverse effects on the viability and behaviour of populations in the wild. Any disturbance of natural ecosystems is minimized, rehabilitated, and there is a compensatory contribution to conservation management.
ANNEX F – ECOTOURISM KENYA ECO-RATING CRITERIA

This Appendix includes details of the Ecotourism Kenya Eco-Rating Certification Scheme, a sustainable tourism certification programme that aims to promote responsible tourism in Kenya. The programme was launched in 2002 by Ecotourism Kenya in cooperation with tourism stakeholders in Kenya with the aim of recognizing best practice in tourism business and with a particular focus upon conservation, community and cultural elements. Accommodation facilities that apply and meet the criteria are awarded Bronze, Silver or Gold certification based on their performance.

The Scheme has been aligned to the Global Sustainable Tourism Criteria, but has been adapted to suit Kenya’s local context. It applies to any type of tourism facility ranging from higher price lodges to homestays. There is flexibility in the criteria depending upon the specific tourism product, and the local regulatory, environmental, social, economic and cultural conditions of a facility. Ecotourism Kenya explains that their indicators are continually updated to adapt to changes in Kenya’s tourism sector.

The full Ecotourism Kenya standards are copied below for reference. The table below indicates which elements of the Scheme are ‘mandatory’ and which are ‘desirable’.

Laikipia Tourism Master Plan –2015 - 2025
GLOSSARY

Animal baiting or Wildlife feeding: Humans giving food materials to wild animals or putting out food stuff for wildlife to trap or entice them for recreational or better viewing or for any other purpose.

Criterion: a standard, rule, or test on which a judgment or decision can be made.

Environmental Conservation: Refers to activities that aim to preserve, protect, maintain, restore, enhance or sustainably use the natural environment to ensure that it meets the needs of the present and future generations.

Environmental Management System (EMS): is a systematic, planned and documented management system to govern a facility’s environmental programs in terms of monitoring, use and guidelines for conservation of environmental resources.

Environmental Policies: refers to the commitment of a facility or organization to the laws, regulations and principles concerning environmental issues and sustainability.

Grey water: wastewater that does not contain sewage or faecal contamination and can be reused for irrigation after simple filtration.

Impact: environmental/biophysical, social, cultural, financial, and economic changes that occur as a result of the activities of the tourism operation.

Invasive alien species: a species occurring in an area outside of its historically known natural range as a result of intentional, unintentional or accidental dispersal by human activities, but not an indigenous species that has extended its natural distribution range by natural means of migration or dispersal without human intervention.

Local community: people living in the immediate area potentially affected socially, economically, or environmentally by a tourism project.

Local: The area immediately around the site of business operations and can vary depending on the density of the location.

Pollution: Refers to introduction of contaminants into the environment, mainly in the form of chemical substances, gases, noise, heat and light.

Protected areas: refers to land which is legally protected by the government under law such as parks, reserves or wetlands etc.
**Solid Waste Management**: refers to all methods applied when handling waste from the point of generation, storage, transportation to offsite areas as well as final disposal/handling-recycling, reuse etc.

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</table>
| **1.1 Legal requirements** Compliance with all applicable local and international regulations | • Evidence on compliance of relevant legal requirements  
• Compliance with relevant business permits and licenses | ✓ | |
| **1.2 Environmental Criteria**  
**1.2.1 Environmental policies** Clear written environmental policy formulated through a participatory process. Should show responsive and conclusive address to responsible resource use, environmental conservation and socio-economic investment | • Clear written environmental policy  
• Show responsive and conclusive address to responsible resource use, environmental conservation and socio-economic investment  
• Evidence of proper communication, translation/implementation of policies into action  
• Evidence of an EMS appropriate to EMP | ✓ | EMS ✓ |
### 1.2.2 Environmental conservation

Undertaking activities aimed to preserve, protect, maintain, restore, enhance or sustainably use the natural environment to ensure it meets the needs of present and future generations.

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<tr>
<td>nature, scale and scope of the business, and current EMP with clarity and specificity of plan (goals, targets, etc) and execution (allocation of responsibility, clear timeframes etc)</td>
<td>Support of biodiversity conservation, including supporting natural protected areas and areas of high biodiversity value.</td>
<td>✔</td>
<td>✔</td>
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<tr>
<td></td>
<td>Demonstrative and effective action in mitigating negative effects of the facility and protecting the natural environment around it.</td>
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<td></td>
<td>Relevant involvement/partnership(s) with environmental conservation organizations or research agencies to</td>
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<td></td>
<td>protect natural environment e.g. Tree planting activities, marine conservation etc</td>
<td>✓</td>
<td></td>
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<tr>
<td></td>
<td>Active involvement of staff and guests in practical activities geared towards environmental conservation and sustainability.</td>
<td>✓</td>
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<tr>
<td></td>
<td>Retaining indigenous species/No introduction of invasive/alien species during construction, landscaping, and operation of the facility</td>
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<tr>
<td></td>
<td>Deterrence from practices that may alter the behavior of natural environment/species e.g. animal baiting</td>
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<td></td>
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<tr>
<td><strong>1.2.3 Waste water management</strong>&lt;br&gt;Presence of effective/adequate and suitable waste water management system that demonstrates concern for the environment</td>
<td>• Presence of effective/adequate waste water management system e.g. grey water from the kitchen should flow through grease-traps, use of septic tanks for black water, enzyme bio-digesters for optimal sludge digestion etc&lt;br&gt;• Evidence of regular effluent testing with existing parameters and compliance with the relevant legislation requirements&lt;br&gt;• Presence of significant innovation, research or investment on measures to reduce/minimize, recycle or reuse grey and black water</td>
<td>✓</td>
<td>✓</td>
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### 1.2.4 Solid waste management

Existence of an effective integrated solid waste management system based on the waste hierarchy for all categories of waste generated by the business operation

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<td>Compliance with the existing legislation and law on waste management</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Presence of an effective solid waste management plan with measures to avoid, reduce/minimize, re-use, and recycle solid waste</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Monitoring and recording of waste types and amounts disposed and recycled with a quantitative goal of minimize non-reusable and non-recyclable waste</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Effective separation of waste at source e.g. clear labeling (plastic waste, glass waste, metallic waste, organic waste etc)</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Suitable management of solid waste e.g. using organic waste for pig rearing or</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
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<tr>
<td></td>
<td>compositing organic waste for manure etc.</td>
<td></td>
<td>✓</td>
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<tr>
<td></td>
<td>• No open-air burning of any category of solid waste</td>
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<tr>
<td></td>
<td>• Presence of an incinerator constructed in line with the relevant legal specifications</td>
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<td>• All waste storage needs to be well contained within appropriate structures, with a solid floor to prevent leakage and soil contamination</td>
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<tr>
<td></td>
<td>• Presence of significant innovation, research or investment on measures to reduce/minimize, recycle or reuse solid waste</td>
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</table>
### 1.2.5 Pollution

The business has an effective management plan that implements practices to minimize pollution from chemicals, light, heat, air, noise and ozone-depleting compounds/gases and contaminants.

- **Effective and specified mitigation measures for each of the potential pollutants and appropriate handling and storage procedures to avoid accidental pollution**
- **Chemical pollution:** All fuels used for either vehicles, generators or boats are appropriately stored within a concrete bound area.
- **Noise Pollution:** Use of sound proof devices e.g. mufflers on generators, and compliance with relevant legal requirement.
- **Light Pollution:** Installation of light sensors, laminated lights, avoiding lighting that extends off-site or into the night sky etc.
- **Air Pollution:** Use of CFC free emission equipments or

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<tr>
<td><strong>1.2.5 Pollution</strong></td>
<td>• Effective and specified mitigation measures for each of the potential pollutants and appropriate handling and storage procedures to avoid accidental pollution</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td>• Chemical pollution: All fuels used for either vehicles, generators or boats are appropriately stored within a concrete bound area.</td>
<td>✓</td>
<td>✓</td>
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<tr>
<td></td>
<td>• Noise Pollution: Use of sound proof devices e.g. mufflers on generators, and compliance with relevant legal requirement.</td>
<td>✓</td>
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<td>• Light Pollution: Installation of light sensors, laminated lights, avoiding lighting that extends off-site or into the night sky etc.</td>
<td>✓</td>
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<td>• Air Pollution: Use of CFC free emission equipments or</td>
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|                    | minimizing use of ozone-depleting compounds  
  • **Heat Pollution**: Use of equipments that generate less thermal heat, insulation of thermal equipments, installation of cooling equipments/measures etc |                   |                   |
| 1.2.6 **Resource management**  
  (a) Water | • Evidence of a water management plan  
  • Water use monitoring e.g. metering, sub-metering and recording the consumption based on bed occupancy, visitors' number, etc.  
  • Suitable water conservation measures e.g. use of water efficient equipment and technology (dual toilet system, adjusting single toilet flush cistern, water | ✓                  |                   |
  |                    | ✓                    | ✓                   | ✓                  |
### Chapter 2 CRITERIA

**Energy**

Energy sources are indicated and conservation measures adapted to enable sustainable use. Energy consumption is effectively monitored.

### Chapter 3 INDICATORS

- Evidence of recycling, reuse and reduced/minimized water usage
- Water harvesting e.g. rainwater, storm water etc
- Significant innovation, research and/or investment on water conservation measures
- Use of visual aids e.g. (posters, notices, brochures etc) and Oral/Audio means e.g. (briefings, meetings, etc) to promote and sensitize staff and guests on water conservation
- Evidence of an energy management plan
- Energy monitoring e.g. metering, sub-metering and recording the

### Chapter 4 MANDATORY

- ✓

### Chapter 5 DESIRED

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<td>consumption based on bed occupancy, visitors' number, etc.</td>
<td>✓</td>
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<tr>
<td></td>
<td>• Suitable energy conservation measures e.g. use of energy efficient equipment and technology (energy saving bulbs, LED bulbs, sensors,)</td>
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<td></td>
<td>• Use of alternative sources of energy/renewable or sustainable energy e.g. solar power, wind energy, bio-fuels, charcoal briquettes for heating etc</td>
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<tr>
<td></td>
<td>• Significant innovation, research and/or investment on energy conservation measures</td>
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<tr>
<td></td>
<td>• Use of visual aids e.g. (posters, notices, brochures etc) and Oral/Audio means e.g. (briefings, meetings, etc) to promote</td>
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<td></td>
<td>sensitise staff and guests on energy conservation</td>
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1.2.7 Visitor education
Existence of communication channels to equip visitors with information on responsible tourism guidelines, local culture and local environment.

- Effective communication channels e.g. Use of visual aids e.g. (posters, notices, brochures, room information sheets etc) and Oral/Audio means e.g. (briefings, meetings, etc) to inform visitors on responsible tourism.
- Demonstration of creativity and/or innovation in visitor education on responsible tourism.

1.3 Architectural design
The architectural design should blend in with the natural environment/surrounding or local culture and should cause minimal disturbance

- Designs/colors/size that blend with the natural environment/surrounding or local culture
- Use of locally available construction materials in design

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<th>✓</th>
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<td>to the natural landscape</td>
<td>• Use of sustainably sourced materials.</td>
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<td>✓</td>
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<td></td>
<td>• Minimal or No vegetation clearing</td>
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<td></td>
<td>• Buildings are designed in such a manner as to allow for maximum utilization of</td>
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<td>natural light /ventilations e.g. translucent roofing</td>
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<tr>
<td>1.4 Chemical use</td>
<td>• Evidence of organic or biodegradable chemicals</td>
<td>✓</td>
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<tr>
<td>Evidence of concern for the environment</td>
<td>• Presence of Material Safety Data Sheets (MSDS) on all the chemicals purchased.</td>
<td>✓</td>
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<td>with regard to chemical choice, usage and storage</td>
<td>• Demonstration of acceptable handling and storage of chemicals</td>
<td>✓</td>
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<td></td>
<td>• Compliance with relevant legislation on chemicals storage and handling</td>
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2.0 COMMUNITY
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<tr>
<td><strong>2.1 Legal requirements</strong></td>
<td>Compliance with all applicable local and international regulations</td>
<td>✓</td>
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<tr>
<td></td>
<td>• Evidence on compliance of relevant legal requirements on community engagement, contracts, land leases, employment and statutory contributions of workers</td>
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<tr>
<td><strong>2.2 Employment policy</strong></td>
<td>A clear employment policy with regard to local communities from within the facility operational areas should be in place indicating what percentage and cadres of staff should be from the local communities</td>
<td>✓</td>
<td>✓</td>
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<td></td>
<td>• Policy statement in place (documented)</td>
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<td></td>
<td>• Evidence of the policy implementation indicating the % of staff in the facility drawn from the local area</td>
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<td><strong>2.3 Community empowerment</strong></td>
<td>Facility should have a clear plan on how</td>
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<td></td>
<td>• Community empowerment plan/statement is in place and made public.</td>
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<td>they intend to lift up the welfare of the local community such as providing internship to students from the local area.</td>
<td>• Community empowerment initiatives in place such as internships, bursaries/scholarships, community enterprises. • Facility has a program that helps employees from the local communities (<em>especially those that are marginalized and therefore generally have low levels of education</em>) to improve their skills/levels of education. (<em>This should have gender inbuilt into it; where culture is not a limiting factor</em>).</td>
<td>✓</td>
<td>✓</td>
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*While circumstances may vary from one location to the other, what a facility decides to do should be based on the needs of the particular local*
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<tr>
<td>community and there must be a clear program of engagement and support that stipulates what should be done.</td>
<td>2.4 Facility Promotes/supports sale or use of goods and services from the local community</td>
<td>Evidence of support to local entrepreneurship <em>(This could be through promoting access to markets at the facility or linking local communities to markets elsewhere)</em>; providing capacity building for product development improvement, provision of inputs and skills in business among others.</td>
<td>✓</td>
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<td>• Evidence of services sought locally by Facility.</td>
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<td>Each Facility should clearly document the kind of support that they provide to the communities they deal with.</td>
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<td>2.6 For facilities in communally owned and privately owned lands, formal and legally binding agreements that clearly stipulate rights and obligations of the parties concerned are in place.</td>
<td>• Legally binding agreements which clearly stipulate rights and obligations and over what period</td>
<td>✓</td>
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<td></td>
<td></td>
<td>• Evidence that systems for review of the fulfillment of these rights and obligations are in place and being fulfilled</td>
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| 2.6 Facility supports the development of socio economic infrastructure of the communities around it in conjunction with the local government agencies/NGOs etc | • A clear program of support to community projects such as water, health clinics, schools, roads among others.  
• Documented and verifiable records of such support which should also include the monetary contributions to such activities.  

*Note: Some of these programs can be expensive to implement and therefore the facility owners may not be expected to implement such initiatives on their own. In other circumstances, facility owners may step in to help where such projects have stalled. What a facility does should be based in the local circumstances and needs but this need to be carefully identified in collaboration with the* | [✓] | [✓] |
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<td><strong>local leaders and agreed upon.</strong></td>
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<td>3.0</td>
<td>CULTURE</td>
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<tr>
<td>3.1 Legal requirements</td>
<td>Compliance with all applicable local and international regulations</td>
<td>★★★</td>
<td>★★★</td>
</tr>
<tr>
<td>3.2 Preservation/protection of local sites that are important with regard to the culture, history of the local communities around the facility including any archeological sites</td>
<td>Facilities aware and/or have documented any cultural, historical and/or archeological sites in the neighborhood of their facilities.</td>
<td>★★★</td>
<td>★★★</td>
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<tr>
<td>3.3 <strong>Architectural design</strong>&lt;br&gt;Facility designs, architecture and art incorporate local culture</td>
<td>Evidence that architectural designs and art in the facility have integrated local culture and that as much as possible, they use locally available construction materials.</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>3.4 <strong>Socio-cultural (culture)</strong>&lt;br&gt;Facility promotes local culture among its customers and has developed materials that adequately inform and communicate this to the clients</td>
<td>• Simple informational materials that clearly communicate the local culture to the visitors.&lt;br&gt;• Code of conduct to be followed by the visitors when interacting with local communities;&lt;br&gt;• Evidence of efforts that the facility has made to help develop and/or improve culture such as establishment of Manyatta’s, curio shops/exhibitions of local arts and crafts, presentations on local culture etc.</td>
<td>✓</td>
<td>✓</td>
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<tr>
<td>4.0 <strong>BUSINESS PRACTICE</strong></td>
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<td>-------------------</td>
</tr>
<tr>
<td><strong>4.1 Legal Requirements</strong>&lt;br&gt;Compliance with all applicable local and international regulations</td>
<td>- Evidence on compliance of relevant legal requirements&lt;br&gt;- Compliance with relevant business permits and licenses</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td><strong>4.2 Procurement/Purchasing and supplies</strong>&lt;br&gt;The business has a purchasing policy that encourages goods produced sustainably, stimulates growth of local micro-economies and reduces negative environmental impacts. This applies to all products including building materials, goods, food and consumables</td>
<td>- A clear procurement policy/strategy/plan e.g. highlighting on sustainable purchasing, environmental considerations/measures and social/community welfare considerations.&lt;br&gt;- <strong>Environmental considerations</strong> e.g. re-usable crates, cartons instead of disposable plastics, minimum or no use of polythene bags for packaging, procuring goods in bulk where necessary etc&lt;br&gt;- <strong>Sustainable purchasing</strong> e.g. ensuring curios are</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Chapter 2 CRITERIA</td>
<td>Chapter 3 INDICATORS</td>
<td>Chapter 4 MANDATORY</td>
<td>Chapter 5 DESIRED</td>
</tr>
<tr>
<td>--------------------</td>
<td>----------------------</td>
<td>---------------------</td>
<td>------------------</td>
</tr>
<tr>
<td></td>
<td>made from sustainable sources like dead wood etc</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Social/community welfare considerations e.g. procuring from the locality where possible.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.3 Health and Safety</td>
<td>• Presence of an adequate and effective emergency procedures / plan</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td>• Compliance with relevant legislation on health and safety e.g. OSHA 2007 etc</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Adequate training of staff on health, safety and emergency response e.g. training on first aid, fire fighting skills etc</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Effective firefighting equipment e.g. duly serviced and strategically placed fire extinguishers, well marked fire exits, fire assembly</td>
<td>✓</td>
<td></td>
</tr>
</tbody>
</table>

Laikipia Tourism Master Plan –2015 - 2025
<table>
<thead>
<tr>
<th>Chapter 2 CRITERIA</th>
<th>Chapter 3 INDICATORS</th>
<th>Chapter 4 MANDATORY</th>
<th>Chapter 5 DES IRED</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td>points, regular fire</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>drills etc</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Use of precautionary</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>and safety signage in</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>appropriate areas</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>e.g. No smoking, Out</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>of bounds, highly</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>flammable etc</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Presence of effective</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>and adequate health</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>and safety measures</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>both to guests and</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>staff</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.4 Economic</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Criteria</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.4.1 Employment</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>and remuneration</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>There should be</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>existence of evidence</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>that employees are</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>respected, are paid at</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>least a sustainable</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>wage and local</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>residents/disadvantaged groups are given equal opportunity for employment</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• A clear employment</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td>policy</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Considering members of the local community by giving priority on available employment opportunities, including in management positions and offering internships/hands on experience to students from the local area</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>✓</td>
</tr>
</tbody>
</table>

Laikipia Tourism Master Plan –2015 - 2025
<table>
<thead>
<tr>
<th>Chapter 2 CRITERIA</th>
<th>Chapter 3 INDICATORS</th>
<th>Chapter 4 MANDATORY</th>
<th>Chapter 5 DESIRED</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Affirmative action to support disadvantaged groups in the local area e.g. gender consideration aspects in recruitment of staff</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td>• Ensuring staff remuneration is in accordance with or above the stated union rates or in accordance with a collectively-bargained agreement</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td>• Ensuring there is a staff welfare union.</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>

4.4.2 Staff education and awareness training

All staff receive periodic guidance and training regarding their roles and responsibilities with respect to environmental conservation, socio cultural and socio economic aspects.

<p>|                    | • Effective communication channels between the management and the staff e.g. staff committee, team building exercises | ✓                   | ✓                |
|                    | • Establishing a regular and/or scheduled staff training program e.g. In-house and professional trainings for staff, | ✓                   | ✓                |</p>
<table>
<thead>
<tr>
<th>Chapter 2 Criteria</th>
<th>Chapter 3 Indicators</th>
<th>Chapter 4 Mandatory</th>
<th>Chapter 5 Desired</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>offering sustainability and conservation trainings etc</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td>• Staff motivation to enhance their skills and awareness e.g. through reward schemes, promotions etc</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td>• Providing skilled or non skilled training to the local people to undertake responsibilities within the facility.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.4.3 Financial obligations</td>
<td>• Ensuring financial obligations of the facility to other parties are adequately met (e.g. park management, the local community, land owners etc)</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Fairness, transparency and equitability on the facility’s financial obligations (land rates, conservancy and lease fees) including absence of</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Chapter 2 CRITERIA</td>
<td>Chapter 3 INDICATORS</td>
<td>Chapter 4 MANDATORY</td>
<td>Chapter 5 DESIRED</td>
</tr>
<tr>
<td>--------------------</td>
<td>-------------------------------------------</td>
<td>------------------------------</td>
<td>-------------------</td>
</tr>
<tr>
<td></td>
<td>complaints, prompt payment etc</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Presence of legal evidence on land</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>ownership or land user rights for the</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>business</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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First publication 2014
ANNEX G – PROPOSED LAIKIPIA TOURISM OPERATING STANDARDS

Included below is a draft of the future Laikipia Tourism Operating Standards. These will be refined through a process of further stakeholder feedback. These are designed to be completed by each individual facility in Laikipia, although businesses with multiple facilities are likely to have similar approaches for each facility within their operation and will provide the same information for much of the audit process.

The background to these draft standards is explained in Part 11.1.4 above. In order for these standards to be effective, they need to be overseen by people with sufficient experience, who understand tourism and sustainability issues. This should however be achievable through a careful recruitment process and subsequent training.

1. GENERAL BUSINESS DETAILS

<table>
<thead>
<tr>
<th>Type of Facility</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel</td>
<td>□</td>
</tr>
<tr>
<td>Lodge</td>
<td>□</td>
</tr>
<tr>
<td>Tented Camp</td>
<td>□</td>
</tr>
<tr>
<td>Self-catering</td>
<td>□</td>
</tr>
<tr>
<td>Mobile / temporary</td>
<td>□</td>
</tr>
<tr>
<td>Community-hosted</td>
<td>□</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Ownership of Facility</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Private</td>
<td>□</td>
</tr>
<tr>
<td>Community</td>
<td>□</td>
</tr>
<tr>
<td>NGO</td>
<td>□</td>
</tr>
<tr>
<td>Government</td>
<td>□</td>
</tr>
</tbody>
</table>

Location: [Details of location in Laikipia]
### Context

<table>
<thead>
<tr>
<th>Operating context and land use:</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Urban</td>
</tr>
<tr>
<td>☐ Town Centre</td>
</tr>
<tr>
<td>☐ Suburban</td>
</tr>
<tr>
<td>☐ Rural</td>
</tr>
<tr>
<td>☐ Wildlife</td>
</tr>
<tr>
<td>☐ Non-wildlife</td>
</tr>
<tr>
<td>☐ Mixed land use</td>
</tr>
</tbody>
</table>

### Property Rights

<table>
<thead>
<tr>
<th>Description of property rights:</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Private land</td>
</tr>
<tr>
<td>☐ Community land</td>
</tr>
<tr>
<td>☐ Government land</td>
</tr>
<tr>
<td>☐ NGO-owned land</td>
</tr>
<tr>
<td>☐ Operator owns land upon which business operates</td>
</tr>
<tr>
<td>☐ Operator holds a lease on the land on which the business operates</td>
</tr>
</tbody>
</table>

### 2. NATIONAL TOURISM STANDARDS COMPLIANCE

#### 2.1 National Tourism Regulatory Authority (‘TRA’) Standards

<table>
<thead>
<tr>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Has the business been assessed by the TRA?</td>
</tr>
<tr>
<td>☐ Yes</td>
</tr>
<tr>
<td>☐ No</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Valid until</th>
</tr>
</thead>
<tbody>
<tr>
<td>[Date]</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Areas for Improvement identified by TRA (if any)</th>
</tr>
</thead>
<tbody>
<tr>
<td>[Description]</td>
</tr>
</tbody>
</table>
## 3. ENVIRONMENTAL STANDARDS

### 3.1 Business Environmental Policy

#### General
Does the business have a written environmental policy in place?  
- [ ] Yes  
- [ ] No

#### Quality

<table>
<thead>
<tr>
<th>Quality of Policy</th>
<th>Strong</th>
<th>Moderate</th>
<th>Weak</th>
</tr>
</thead>
<tbody>
<tr>
<td>[Comments]</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Internal Communication

- Has the business communicated the policy clearly to its staff?  
  - [ ] Yes  
  - [ ] No
- Has the business conducted training for its staff on the policy?  
  - [ ] Yes  
  - [ ] No

[Comments/details]

### 3.2 Resource Management

#### General

<table>
<thead>
<tr>
<th>Does the business demonstrate awareness of its use of (and impact upon) natural resources?</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ] Yes</td>
</tr>
</tbody>
</table>

#### Mitigating Impacts

<table>
<thead>
<tr>
<th>To what extent does the business mitigate its impact on the natural environment?</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ] As much as possible</td>
</tr>
<tr>
<td>[ ] To some extent</td>
</tr>
<tr>
<td>[ ] Not at all</td>
</tr>
</tbody>
</table>

[Comments/details]

#### Waste Management
### Energy Use

Does the business have an active waste management policy which reduces its impact on the natural environment?

- [ ] Yes  - [ ] No

[Comments/details]

Does the business have an energy use policy which reduces its consumption of energy?

- [ ] Yes  - [ ] No

Does the business utilise renewable energy (e.g. solar, wind etc.)?

- [ ] Yes  - [ ] No

[Comments/details]

### 3.3 Site and Building Design

**General**

Has the business demonstrate awareness of the natural environment when siting and designing the tourism facility?

- [ ] Yes  - [ ] No

**Visual impact**

To what extent has the business considered its visual impact on the natural environment and landscape of Laikipia?
<table>
<thead>
<tr>
<th>Consideration for other Laikipia tourism businesses</th>
<th>To what extent has the business considered the impact of its operations on other tourism businesses in Laikipia (i.e. light, noise and impact of guest activities)?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>□ As much as possible □ To some extent □ Not at all</td>
</tr>
<tr>
<td></td>
<td>[Comments/details]</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Design</th>
<th>To what extent has the business considered the natural environment in the design of its tourism facility (in terms of siting, visual impact and materials used)?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>□ As much as possible □ To some extent □ Not at all</td>
</tr>
<tr>
<td></td>
<td>[Comments/details]</td>
</tr>
</tbody>
</table>

### 3.4 Active Support for Nature Conservation

<table>
<thead>
<tr>
<th>General</th>
<th>Does the business actively support nature / wildlife conservation? □ Yes □ No</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Conservation Activities</th>
<th>Does the business carry out any conservation activities directly, or have any partnerships with nature / wildlife conservation organisations?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>□ Yes □ No</td>
</tr>
</tbody>
</table>

[Comments/details]
## Guest Communication

Does the business communicate its involvement in nature / wildlife conservation to its guests?

- Yes
- No

[Comments/details]

## Guest Activities

Does the business offer activities which actively and creatively engage its guests in nature / wildlife conservation?

- Yes
- No

[Comments/details]

## Financial Support for Conservation

Does the business provide direct financial support to nature / wildlife conservation through its operations (either directly and/or through guest fees)?

- Yes
- No

[Comments/details]

### 4. COMMUNITY

#### 4.1 Involvement of Local Communities

<table>
<thead>
<tr>
<th>General</th>
<th>Does the business have a clear opportunity to engage with a relevant local community?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Yes  No</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Context</th>
<th>Description of local community context</th>
<th>Urban</th>
<th>Rural</th>
</tr>
</thead>
</table>
### 4.2 Employment Opportunities

<table>
<thead>
<tr>
<th>Employment Opportunities</th>
</tr>
</thead>
<tbody>
<tr>
<td>To what extent does the business offer employment opportunities for members of relevant local communities?</td>
</tr>
<tr>
<td>☐ As much as possible ☐ To some extent ☐ Not at all</td>
</tr>
</tbody>
</table>

[Comments/details]

### 4.3 Local Purchasing

<table>
<thead>
<tr>
<th>Business Operations</th>
</tr>
</thead>
<tbody>
<tr>
<td>To what extent does the business actively purchase supplies and services from the local community?</td>
</tr>
<tr>
<td>☐ As much as possible ☐ To some extent ☐ Not at all</td>
</tr>
</tbody>
</table>

[Comments/details]

<table>
<thead>
<tr>
<th>Guests</th>
</tr>
</thead>
<tbody>
<tr>
<td>To what extent does the business actively encourage/facilitate guests to purchase products from the local community?</td>
</tr>
<tr>
<td>☐ As much as possible ☐ To some extent ☐ Not at all</td>
</tr>
</tbody>
</table>

[Comments/details]
### 4.4 Investment in the Community

<table>
<thead>
<tr>
<th>Business Operations</th>
<th>To what extent does the business actively invest in the community in terms of supporting community development initiatives (e.g. schools, clinics)?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>☐ As much as possible ☐ To some extent ☐ Not at all [Comments/details]</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Guests</th>
<th>To what extent does the business actively encourage its guests to support community development initiatives?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>☐ As much as possible ☐ To some extent ☐ Not at all [Comments/details]</td>
</tr>
</tbody>
</table>

### 5. CULTURE

#### 5.1 Cultural Context

<table>
<thead>
<tr>
<th>General</th>
<th>Does the business operate in a context where local culture and traditions are relevant?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>☐ Yes ☐ No</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Context</th>
<th>Description of local cultural context ☐ Urban ☐ Rural [Comments/details]</th>
</tr>
</thead>
</table>
### 5.2 Cultural Sensitivity

<table>
<thead>
<tr>
<th>Awareness</th>
<th>To what extent does the business demonstrate awareness of local culture and traditions in its operations?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>[Comments/details]</td>
</tr>
<tr>
<td>Mitigation of Impact</td>
<td>If relevant, does the business mitigate the potential for any negative impact on local culture and traditions?</td>
</tr>
<tr>
<td></td>
<td>[Comments/details]</td>
</tr>
</tbody>
</table>

### 5.3 Cultural Support

<table>
<thead>
<tr>
<th>Business Operations</th>
<th>Does the business actively support preservation and enhancement of local culture and traditions?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>[Comments/details]</td>
</tr>
<tr>
<td>Guests</td>
<td>Does the business offer guest activities which help to preserve and enhance local culture and traditions?</td>
</tr>
<tr>
<td></td>
<td>[Comments/details]</td>
</tr>
</tbody>
</table>
This Appendix includes a detailed list of recommended contractual terms for the purpose of driving conservation-friendly operating standards within conservancy or protected area tourism contracts in Laikipia. These are intended to be of value for Laikipia landowners who are considering entering into a sustainability-based partnership with a tourism operator. Again, these are based upon best practice in conservancy or protected area tourism contexts elsewhere in Africa.

**Environmental Standards**

1. The tourism operator (the ‘Operator’) shall ensure that all aspects of the tourism facility or facilities which it proposes to construct (the “Tourism Facility”) and its associated operations are managed in compliance with all relevant applicable environmental laws Laikipia and that all requisite permits, licenses and approvals are in force and up to date at all times.

2. The Operator shall use all reasonable endeavours to ensure that the physical infrastructure of the Tourism Facility shall visually integrate with the surrounding landscape so as to minimise its impact on the natural beauty of the site and its environs.

3. The Operator shall use all reasonable endeavours to design and manage the infrastructure and operations of the Tourism Facility in a manner which minimises noise, light and air pollution.

4. The Operator shall use all reasonable endeavours to design and manage the infrastructure and operations of the Tourism Facility in a manner which:

   a. optimises the efficient use of available water resources;
   b. re-uses and recycles water wherever possible;
   c. ensures that overall water use (where feasible by installing water meters) and quality is actively and consistently monitored and plans are put in place to reduce overall water consumption where feasible; and
   d. ensures that required water resources are obtained from a sustainable source; a source that can supply enough water under normal average conditions;
e. Ensures that no natural waterways or water bodies are illegally dredged, blocked, damned or altered;

f. Ensures that no waste, leakage or pollutants from the Tourism Facility are leached, leaked, dumped or disposed of into any waterways or water bodies.

5. The Operator shall use all reasonable endeavours to design and manage the infrastructure and operations of the Tourism Facility in a manner which:

   a. Optimises the efficient use of requisite energy inputs;
   
   b. Optimises the use of non-polluting, renewable energy sources;
   
   c. Minimises the use of non-renewable energy;

6. The Operator shall use all reasonable endeavours to ensure that the principle of Reduce, Re-use, and Recycle is proactively deployed across all aspects of its operations.

7. The Operator shall use all reasonable endeavours to store waste in a way that does not attract any wildlife.

8. The Operator shall use all reasonable endeavours to ensure that the burning of waste is a practice only utilised as a last resort.

9. The Operator shall use all reasonable endeavours to ensure that should any chemicals or pesticides be required by the Tourism Facility that these are used as a last resort; are stored and disposed of properly and that no banned chemical or pesticide shall be used.

10. The Operator shall use all reasonable endeavours to actively promote the benefits of responsible water use, energy use and waste management together with the technologies and means by which this can be achieved, as widely as possible including but not necessarily limited to guests, employees, host protected area staff and the wider local community either within or neighbouring the [conservancy or protected area].

11. The Operator shall use all reasonable endeavours to procure products and services for the Tourism Facility from suppliers whose operating principles and practices are consistent with this framework; and to procure said products where possible from the local communities neighbouring the [conservancy or protected area], if they meet the conservation principles contained herein and the quality required by the Tourism Facility.
**Promotion of Conservation**

12. The Operator shall use all reasonable endeavours to design and manage recreational guest activities in a way that creatively and sensitively promotes a meaningful understanding of the conservation related context in which the guests are enjoying their recreational tourism experience at the Tourism Facility and within the wider [conservancy or [conservancy or protected area]] and the ways in which the existence of and initiatives undertaken by the [conservancy or [conservancy or protected area] management authorities] and the tourism operation serve to strengthen the underlying associated conservation values.

13. The Operator shall use all reasonable endeavours to develop and manage a marketing plan, targeting both domestic and international markets, that incorporates messaging that consistently promotes a meaningful understanding of the conservation context in which the Tourism Facility operates and the ways in which the existence of and initiatives undertaken by the [conservancy or [conservancy or protected area] management authorities] and the tourism operation serve to strengthen the underlying associated conservation values of the [conservancy or [conservancy or protected area]].

**Wildlife and Natural Resources**

14. The Operator shall respect wildlife and natural resources at all times, including but not limited to when taking guests on game drives and keeping required distances to decrease impact on wildlife; to ensure walking paths do not negatively impact the vegetation; to not bait wildlife for tourism viewing, except the use of a water hole; to restrict any feeding of wildlife by staff and guests; to not harass any wildlife for any purposes, including attracting wildlife for photographs; to not litter; and to not drive off road, except where permitted in the [conservancy or protected area] Management Plan.

15. The Operator shall design and implement a code of conduct for all the guests at the Tourism Facility that specifically addresses health and safety issues as well as the conservation context of the [conservancy or protected area] and to ensure that guests understand and consistently adhere to the provisions therein.
**Creation of a Conservation Operating Culture**

16. In terms of internalising environmental and conservation culture in business operations, the Operator shall use all reasonable endeavours to ensure that all employees understand and assess the impact that the operations have on the environment, and proactively advise how such employees can contribute to the protection flora and fauna and enhance environmental conservation in the [conservancy or protected area].

17. The Operator shall ensure that its guides are well trained in accordance with the professional guiding standards of Laikipia and fully understand the [conservancy or protected area] Management Plan and can to the best of their ability promote a conservation ethic.

18. The Operator shall ensure that in the event that an employee or contractor is engaged in any activity or behaviour that violates any of these operating principles contained herein, to notify the individual concerned about the nature of the violation, explain the importance of the violated principle(s) and to issue a warning to the effect that should such violation persist, the employee’s such employment or contract will be terminated provided that such termination shall comply with relevant laws of Laikipia; and to terminate the employee’s employment or contract in the event a violation recurs following the issue of a warning.

**Engaging in the Wider Conservation Context**

19. The Operator shall use all reasonable endeavours to participate as appropriate in relevant aspects of [conservancy or protected area] management planning and in any environmental and conservation planning and programs being carried out by the County Government.

20. The Operator shall ensure that any notable sighting or incident – positive or negative– relevant to the optimum conservation management of the [conservancy or protected area] is reported on a timely basis to the [conservation area management authority] including but not limited to sightings of rare, threatened or endangered species; poaching; illegal resource extraction; any dead wildlife that they perceive to have died from unnatural or suspicious causes; and violation of [conservancy or protected area] boundaries and/or land use prescriptions.
21. The Operator shall meet at least once a year with the Wildlife Service to stay abreast of regional conservation initiatives and changes and to assess its ability to engage in broader conservation initiatives in the [conservancy or protected area] and beyond.

**Conservation Protection**

22. The Operator shall use all reasonable endeavours to adhere to the [conservancy or protected area] Management Plan, including but not limited to upholding and adhering to the ecological and tourism use zones and activities outlined in the plan.

23. The Operator shall not engage in any illegal or unsustainable natural resource extraction or violations; including but not limited to:

   a. **Illegal killing of any Wildlife**;
   b. **Illegal Charcoal Production**;
   c. **Illegal cutting of trees and vegetation**;
   d. **Illegal Natural Resource Extraction**;
   e. **Illegal Water Extraction**;

24. The Operator shall ensure that all financial sums due to the County Government are paid in full and on time.

**Responsible Employment**

25. The Operator shall provide equal opportunity to women and to not discriminate against gender and race.

26. The Operator shall to the extent possible and where skills are available, hire from the local community.

27. The Operator shall ensure that all employees are provided with well-defined job descriptions and terms of reference.

28. The Operator shall ensure that all of its employees have a contract that clearly states their role and conditions of employment that conforms to relevant laws of Laikipia.

29. The Operator shall ensure that all employees shall be paid at or above the national/local minimum wage, with statutory holiday and sick pay entitlements honoured at all times.
30. The Operator shall ensure that all employees’ legal right to work is verified and recorded.

31. The Operator shall ensure that all employment contract related documentation is also made available in the locally understood language.

32. The Operator shall ensure that where employee housing is supplied on site, it shall have adequate sanitation and running water and meet or exceed local standards.

33. The Operator shall ensure that structured employee performance reviews are carried out at least once a year to ascertain training needs, identify targets and review progress and promotion, and wherever practical to do the same for suppliers.

34. The Operator shall ensure that high quality, relevant training procedures are developed and implemented for employees in consultation with the County Government.

35. The Operator shall ensure that grievance and conflict resolution procedures are provided to employees and suppliers and to ensure that employees and suppliers have an opportunity to express any grievances, and highlight any training requirements that they feel they may benefit from.

**Health and Safety**

36. The Operator shall provide all of its employees with a health, hygiene and safety induction training with reviews of these inductions being conducted as needed.

37. The Operator shall ensure that all employees shall have access to clean toilets and hand washing facilities in the vicinity of their work and maintain a consistent cleaning record.

38. The Operator shall ensure that first aid kits are present at all permanent installations as well as in the vicinity of all workers.

39. The Operator shall ensure that all accident and emergency procedures and instructions shall be clearly understood by all employees.

40. The Operator shall ensure that fire procedures are well understood by all employees and are in place for all permanent installations.
41. The Operator shall ensure that all hazards have been properly assessed and that they are clearly identified with warning signs.

42. The Operator shall implement measures to ensure staff safety precautions and standards are in accordance with the laws of Laikipia.

43. The Operator shall ensure that clear accident procedures are established and well understood by all employees and suppliers.

44. The Operator shall ensure that permanent signs are written in the predominant language of the workforce, that instructions be supported by symbols where possible, and that employees who are illiterate receive verbal instructions and training.
ANNEX I: DEVELOPING TOURISM IN NEW WILDLIFE AREAS AND COMMUNITY CONSERVANCIES

This Appendix includes a brief overview of best practice in tourism development in natural areas, which will be relevant within the context of new community conservation areas and areas of government land which are made available for wildlife conservation related tourism development in Laikipia.

Identification of Concession Opportunities

Successful tourism development in new community conservancies and other wildlife areas in Laikipia should focus on three sequential headline processes:

Identifying Tourism Concession Opportunities: Integrating a consistent process within Laikipia’s tourism sector for identifying and validating optimal tourism concession opportunities that should be made available for development.

Awarding Tourism Concessions: Identifying optimal private sector commercial partners for developing available concessions. County Government and communities should ideally seek to develop commercial partnerships rather than operating tourism experiences themselves.

Tourism Concession Contracts: Developing optimal contracts that will define the way in which such concessions should be developed and managed in support of the environmental and social objectives of County Government – e.g. fee structures in support of local employment obligations.

Competitive Tendering

It is essential to consistently use an open competitive tender process in order to attract and assess the best possible operators for the identified Tourism Use Concessions.

i) Effective Promotion: Tender opportunities must be promoted using all relevant media channels (local and international press, internet, social media, industry / trade networks etc.).

ii) Bidder Information: All potential operators must be required to organise their submissions within a consistent information requirements structure, the key components of which should include:
o **Operating Track Record**: Analysis success of the bidder's prior operating experience (including outside Laikipia);

o **Human, Technical and Financial Resources**: Analysis of the relevant resources required to optimally fulfil the Tourism Use Concession obligations;

o **Commercial Capability**: A detailed business plan which incorporates financial, marketing and risk management elements (of particular importance in the Laikipia context);

o **Conservation Impact**: Proposals for ways in which the operator's anticipated tourism facility(ies) will manage impact on the environment, and how its operating practices will involve proactive and creative engagement with the conservation organisations working within Laikipia and with County Government;

o **Local Community Impact**: Where relevant, proposals for best practice employment and positive engagement with wider local community development initiatives.

iii) **In Person Presentations**: Selected operators must support their written bids with an in-person presentation to the County Government and support partners such as LWF. The County Government evaluation process must be supported by technical expertise with respect to private sector tourism management issues.

### Fee Structures

Fee structures used within Tourism Use Concessions within Laikipia’s new and existing conservation areas must be driven by a pre-determined formula – **not by negotiation**. While the formula applied must be consistent, the precise amounts involved will differ from one area to another reflecting the conservation / other value and its commercial tourism prospects.

The use of such pre-determined formulas will optimise the financial and wider value of the Tourism Use Concessions and will also serve to simplify their administration, increase financial control and promote the development of a level playing field for competing operators (something that will encourage the highest quality operators to bid).

A detailed analysis of the merits of different commonly used fee structures in nature-based tourism contexts elsewhere in Africa carried out by Conservation Capital results in a recommendation that the following fee structure dynamics be applied in all Tourism Use Concessions across Laikipia:
1) **A variable fee** element which will vary with the performance of the tourism facility (or facilities) operated by the selected tourism operator;

2) **A fixed minimum annual threshold** relating to the variable fee element in order to protect against sub-optimal management of the tourism facility by the selected tourism operator;

3) **A fixed annual fee** which will reflect the basic underlying right of the selected tourism operator to conduct business in the Tourism Use Concession area.

4) **A per person conservation fee or park fee** collected by the tourism operator and remitted to the relevant landowner, community or County Government according to the context.

The variable fee element should be determined by the *top line revenue* generated by the tourism operator's accommodation facility (or facilities) as opposed to bottom line profit. Furthermore, a *percentage based* structure as opposed to a bed-night based structure is recommended.

**Contracting**

Best practice within tourism partnerships in natural areas in Africa places particular emphasis on the following components:

- The ‘Term’ or length of the lease or operating contract granted by the natural area to the selected tourism operator;
- The fee structure which will be applied;
- The environmental and other conditions which will attach to the design and construction of the tourism facilities;
- Insurance and indemnification – both with regard to the conservancy or reserve management authority and the tourism operator's business;
- Reporting and communication between the parties to the contract;
- Termination and dispute resolution.
## ANNEX J - ADDITIONAL TOURISM DATA – KENYA CONTEXT

### a. Hotel rooms and beds available and occupied by zone 2012

### Table 18 (a) - Hotel Rooms and Beds Available and Occupied by Zone, 2012

<table>
<thead>
<tr>
<th>ZONE</th>
<th>Number of Hotels</th>
<th>ROOMS</th>
<th>BEDS</th>
</tr>
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<tbody>
<tr>
<td></td>
<td></td>
<td>Available</td>
<td>Occupied</td>
</tr>
<tr>
<td>NAIROBI</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>High Class</td>
<td>30</td>
<td>1,543.3</td>
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<tr>
<td>Other</td>
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<td>Total</td>
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<td>COAST HINTERLAND-</td>
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<tr>
<td>East</td>
<td>43</td>
<td>117.7</td>
<td>28.8</td>
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<td>West</td>
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<td>East</td>
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<td>West</td>
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<td>Grand Total</td>
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<td>11,529.6</td>
<td>4,882.0</td>
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Source: Kenya National Bureau of Statistics

1 For definitions see the first page of this chapter.
b. Hotel rooms and beds available and occupied by zone 2013

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<tr>
<th>ZONE1</th>
<th>Number of Hotels</th>
<th>ROOMS</th>
<th>Occupancy Rate (per cent)</th>
<th>BEDS</th>
<th>Occupancy Rate (per cent)</th>
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<td>Occupied</td>
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<td>Available</td>
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<td>NAIROBI-</td>
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<td>High Class</td>
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<td>1,023.7</td>
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1 For definitions see the first page of this chapter.
c. Forecast future tourism trends to 2018

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<td>1.7</td>
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<td>2.2</td>
<td>2.1</td>
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<td>Stay unit nights (millions)</td>
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<td>3.9</td>
<td>3.8</td>
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<tr>
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<td>Average room rates (USD)</td>
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<td>135</td>
<td>158</td>
<td>155</td>
<td>155</td>
<td>155</td>
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<td>158</td>
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<td></td>
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<tr>
<td>% change</td>
<td>29.3</td>
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<td>17.0</td>
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<td>0.0</td>
<td>0.0</td>
<td>0.6</td>
<td>1.3</td>
<td>1.3</td>
<td>1.9</td>
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<td>Total room revenue (USD millions)</td>
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<td>500</td>
<td>648</td>
<td>605</td>
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<td>558</td>
<td>546</td>
<td>569</td>
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Sources: PricewaterhouseCoopers LLP, Wilkofsky Gruen Associates
APPENDIX K  ADDITIONAL TOURISM DATA – EAST AFRICA CONTEXT

The following data-sets have informed the consolidated summary in Part 3 relating to the wider East African context.

PART A: INDIVIDUAL COUNTRY ANALYSIS: KENYA

KEY TOURISM STATISTICS11:

- **Direct contribution to GDP:** The direct contribution of Travel & Tourism to GDP was KES 180.8bn (5.0% of total GDP) in 2012, and is forecast to rise by 1.7% in 2013, and to rise by 4.6% pa, from 2013-2023, to KES288.3bn in 2023 (based upon constant trends reflecting 2012 prices).

- **Total contribution to GDP:** The total contribution of Travel & Tourism to GDP was KES 448.4bn (12.5% of GDP) in 2012, and is forecast to rise by 2.2% in 2013, and to rise by 4.5% pa to KES714.8bn in 2023. *It would appear that the 10% estimate figure in the Kenya National Tourism Strategy 2008-2012 is based upon total rather than direct GDP contribution.

- **Direct employment contribution:** In 2012 Travel & Tourism directly supported 232,500 jobs (4.3% of total employment). This is expected to fall by 1.4% in 2013 (due presumably to the Kenya elections and wider economic conditions in global source markets) and rise by 2.2% pa to 286,000 jobs (4.1% of total employment) in 2023.

- **Total employment contribution:** In 2012, the total contribution of Travel & Tourism to employment, including jobs indirectly supported by the industry, was 10.9% of total employment (594,500 jobs). This is expected to fall by 0.9% in 2013 to 589,500 jobs and rise by 2.2% pa to 730,000 jobs in 2023 (10.5% of total).

- **Visitor exports:** Visitor exports generated KES 171.4bn (19.1% of total exports) in 2012. This is forecast to grow by 0.5% in 2013, and grow by 4.6% pa, from 2013-2023, to KES 270.6bn in 2023 (12.1% of total).

- **Investment:** Travel & Tourism investment in 2012 was KES 52.1bn, or 7.4% of total...

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11 World Travel and Tourism Council Economic Impact Kenya 2013
investment. It should rise by 4.7% in 2013, and rise by 4.7% pa over the next ten years to KES 86.3bn in 2023 (7.5% of total).

KEY DATA ILLUSTRATIONS

1. Visitor exports and international tourism arrivals

2. Direct contribution of travel and tourism to employment

3. Total contribution of travel and tourism to employment
4. Travel and tourism contributions to GDP by type and origin

![Pie Chart: Kenya Travel & Tourism's Contribution to GDP: Leisure vs Business, 2013]

- Leisure spending: 66.4%
- Business spending: 33.6%

![Pie Chart: Kenya Travel & Tourism's Contribution to GDP: Foreign vs Domestic, 2013]

- Foreign visitor spending: 54.4%
- Domestic spending: 45.6%

5. Arrivals into National Parks

![Graph: Arrivals into National Parks (000's)]

- Year: 2001 to 2010*
- Arrivals (000's): 0 to 3,000

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12 [http://www.knbs.or.ke/tourism_summary.php](http://www.knbs.or.ke/tourism_summary.php)
PART B: INDIVIDUAL COUNTRY ANALYSIS: ETHIOPIA

KEY TOURISM STATISTICS\(^{13}\):

- **Direct contribution to GDP:** The direct contribution of Travel & Tourism to GDP was ETB 33,149.8mn (5.1% of total GDP) in 2012, and is forecast to rise by 4.3% in 2013, and to rise by 4.1% pa, from 2013-2023, to ETB 51,713.0mn in 2023 (based upon price trends to 2012);

- **Total contribution to GDP:** The total contribution of Travel & Tourism to GDP (i.e. including all related services for visitors) was ETB 79,479.8mn (12.3% of GDP) in 2012, and is forecast to rise by 5.0% in 2013, and to rise by 4.3% pa to ETB 127,097.0mn in 2023;

- **Direct employment contribution:** In 2012 Travel & Tourism directly supported 1,085,500 jobs (4.3% of total employment). This is expected to rise by 1.0% in 2013 and rise by 0.3% pa to 1,133,000 jobs (3.3% of total employment) in 2023;

- **Total employment contribution:** In 2012, the total contribution of Travel & Tourism to employment, including jobs indirectly supported by the industry, was 10.6% of total employment (2,699,000 jobs). This is expected to rise by 1.7% in 2013 to 2,746,000 jobs and rise by 0.5% pa to 2,885,000 jobs in 2023 (8.5% of total);

- **Visitor exports:** Visitor exports generated ETB 40,710.0mn (58.4% of total exports) in 2012. This is forecast to grow by 4.0% in 2013, and grow by 3.3% pa, from 2013-2023, to ETB 58,493.2mn in 2023 (38.3% of total);

- **Investment:** Travel & Tourism investment in 2012 was ETB 12,703.6mn, or 7.5% of total investment. It should rise by 7.3% in 2013, and rise by 4.4% pa over the next ten years to ETB 20,953.4mn in 2023 (5.5% of total).

KEY DATA ILLUSTRATIONS

1. Visitor exports and international tourism arrivals

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\(^{13}\) World Travel and Tourism Council Economic Impact Ethiopia 2013
2. Direct contribution of travel and tourism to employment

3. Total contribution of travel and tourism to employment

4. Travel and tourism contributions to GDP by type and origin
5. National tourist arrivals by type

6. Arrivals into [conservancy or protected area]s
PART C: INDIVIDUAL COUNTRY ANALYSIS: TANZANIA

KEY TOURISM STATISTICS\(^{14}\):

- **Direct contribution to GDP:** The direct contribution of Travel & Tourism to GDP was TZS 2,367.8bn (4.8% of total GDP) in 2012, and is forecast to rise by 2.8% in 2013, and to rise by 5.9% pa, from 2013-2023, to TZS 4,316.5bn in 2023 (based upon 2012 price trends);

- **Total contribution to GDP:** The total contribution of Travel & Tourism to GDP was TZS 6,511.8bn (13.2% of GDP) in 2012, and is forecast to rise by 3.6% in 2013, and to rise by 6.4% pa to TZS 12,496.7bn in 2023;

- **Direct employment contribution:** In 2012 Travel & Tourism directly supported 422,000 jobs (4.0% of total employment). This is expected to fall by 1.6% in 2013 and rise by 1.9% pa to 502,000 jobs (3.7% of total employment) in 2023;

\(^{14}\) World Travel and Tourism Council Economic Impact Tanzania 2013
- **Total employment contribution:** In 2012, the total contribution of Travel & Tourism to employment, including jobs indirectly supported by the industry, was 11.5% of total employment (1,199,500 jobs). This is expected to fall by 0.8% in 2013 to 1,189,500 jobs and rise by 2.4% pa to 1,502,000 jobs in 2023 (11.0% of total);

- **Visitor exports:** Visitor exports generated TZS 2,749.7bn (24.8% of total exports) in 2012. This is forecast to grow by 1.3% in 2013, and grow by 5.6% pa, from 2013-2023, to TZS 4,786.6bn in 2023 (24.2% of total);

- **Investment:** Travel & Tourism investment in 2012 was TZS 1,424.1bn, or 10.4% of total investment. It should rise by 2.2% in 2013, and rise by 6.1% pa over the next ten years to TZS 2,636.7bn in 2023 (10.1% of total).

**KEY DATA ILLUSTRATIONS**

1. Visitor exports and international tourism arrivals
2. Direct contribution of travel and tourism to employment

3. Total contribution of travel and tourism to employment

4. Travel and tourism contributions to GDP by type and origin

**NOTE:** No meaningful visitor information was available for the [conservancy or protected area] system.
PART D: INDIVIDUAL COUNTRY ANALYSIS: UGANDA

KEY TOURISM STATISTICS\(^{15}\):

- **Direct contribution to GDP**: The direct contribution of Travel & Tourism to GDP was UGX 2,132.6bn (3.7% of total GDP) in 2012, and is forecast to rise by 2.8% in 2013, and to rise by 5.5% pa, from 2013-2023, to UGX 3,729.1bn in 2023 (based upon 2012 price trends);

- **Total contribution to GDP**: The total contribution of Travel & Tourism to GDP was UGX 4,993.6bn (8.8% of GDP) in 2012, and is forecast to rise by 3.2% in 2013, and to rise by 5.8% pa to UGX 9,015.1bn in 2023;

- **Direct employment contribution**: In 2012 Travel & Tourism directly supported 199,500 jobs (3.1% of total employment). This is expected to rise by 0.4% in 2013 and rise by 3.1% pa to 272,000 jobs (2.9% of total employment) in 2023;

- **Total employment contribution**: In 2012, the total contribution of Travel & Tourism to employment, including jobs indirectly supported by the industry, was 7.6% of total employment (483,500 jobs). This is expected to rise by 0.8% in 2013 to 488,000 jobs and rise by 3.4% pa to 680,000 jobs in 2023 (7.2% of total);

- **Visitor exports**: Visitor exports generated UGX 2,607.9bn (23.9% of total exports) in 2012. This is forecast to grow by 1.3% in 2013, and grow by 5.0% pa, from 2013-2023, to UGX 4,300.0bn in 2023 (17.7% of total);

- **Investment**: Travel & Tourism investment in 2012 was UGX 550.2bn, or 4.4% of total investment. It should rise by 3.9% in 2013, and rise by 6.5% pa over the next ten years to UGX 1,070.9bn in 2023 (4.4% of total).

\(^{15}\) World Travel and Tourism Council Economic Impact Uganda 2013
KEY DATA ILLUSTRATIONS

1. Visitor exports and international tourism arrivals

![Graph showing visitor exports and international tourism arrivals](image)

2. Direct contribution of travel and tourism to employment

![Graph showing direct contribution](image)

3. Total contribution of travel and tourism to employment

![Graph showing total contribution](image)

4. Travel and tourism contributions to GDP by type and origin

![Graph showing contributions to GDP](image)
5. **Arrivals into National Parks**¹⁶

¹⁶ Uganda Wildlife Authority
1. Consolidated total GDP contributions – Annual percentage changes

Notes

- **Annual percentage change in total GDP contributions**: Overall, with the exception of Kenya in 2008 and 2009, all countries generated growing GDP contributions in
percentage terms year-on-year from 2007 – 2012. The annual rates of growth were particularly robust in Ethiopia and Uganda.

- **Cumulative net percentage change in total GDP contributions:** On a net cumulative basis, total GDP contributions from tourism sectors increased across all four countries. Again on a relative basis, Ethiopia and Uganda showed the greatest cumulative net growth rate.

2. **Tourism sector investment against tourism sector national employment contribution**

<table>
<thead>
<tr>
<th>Year</th>
<th>Investment into tourism sector</th>
<th>Direct employment contribution to tourism sector</th>
<th>Total employment contribution to tourism sector</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007</td>
<td>80,000</td>
<td>20,000</td>
<td>30,000</td>
</tr>
<tr>
<td>2008</td>
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<tr>
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<tr>
<td>2013</td>
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<td>50,000</td>
<td>90,000</td>
</tr>
<tr>
<td>2023</td>
<td>300,000</td>
<td>60,000</td>
<td>120,000</td>
</tr>
</tbody>
</table>

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17 2023 figures are estimates based upon statistical trends
The above graphs show a uniformly positive correlation between investment in the tourism sector and employment numbers.
3. Percentage changes in employment sector contributions

Notes

- **Annual percentage change in direct employment contributions:** With the exception of Tanzania (and Kenya in 2009), overall employment has grown in percentage terms, and importantly at an increasing rate across all countries. The rate of growth is particularly apparent in Ethiopia and Uganda.

- **Cumulative net percentage change in direct employment contributions:** Tanzania has shown a net decrease in the cumulative employment contributions and...
rate of tourism sectors from 2007 – 2012. Ethiopia, Uganda and Kenya have all however shown an increase in the net employment rate of tourism sectors over the period.

4. **Tourism sector investment against visitor exports** and international tourist arrivals

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18 *Effective spend by and related to visitors*
Once again, in all four countries the amounts invested in the tourism sector by the government are exceeded by the overall spend by visitors to their country.

5. Consolidated visitor export contributions
Notes

- **Annual % change in visitor export contributions**: From 2007 – 2012 the change in visitor export contributions have on the whole been positive with the exceptions being in 2008 and 2009 where contributions fell year-on-year, most likely the result of the global financial crisis. An interesting outcome of the data shows that across all four countries, 2012 visitor contributions remained largely the same as in 2011 with no substantial variations in visitor export contributions;

- **Cumulative net percentage change in visitor export contributions**\(^{19}\): Figure 2 shows that all four countries have experienced a net positive increase in visitor export contributions from 2007 – 2012. The data shows that net accumulative visitor exports increased by approximately 20% – 30% in Kenya and Tanzania, yet Ethiopia and Uganda showed a dramatic increase of approximately 100% - 115%.

The variation in the two groups reflects the market maturity of the countries. Kenya and Tanzania are relatively mature tourism markets with consistent and regular

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\(^{19}\) This is calculated by accumulating the year-on-year percentage changes in contributions to provide a net change over the reporting period that is represented across all four geographic countries.
tourism product and activity uptake over the past 10 years. Uganda and Ethiopia on the other hand only began to meaningfully develop their tourism sectors within the last 10 years, resulting in a more marked increase in visitor export contributions as visitor numbers have grown significantly in relative terms over this period.
LAIKIPIA COUNTY
Sustainable Tourism
Master Plan