



2025 KAHC ANNUAL SYMPOSIUM

Theme "Towards 5 Million"



26 – 27 June 2025

Sarova Whitesands Beach Resort and Spa

Host: Mike Macharia, Chief Executive Officer, KAHC
Co-Host: Cathrine Murage, KAHC Finance Chairperson

Sponsors of the 2025 KAHC Annual Symposium



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Executive Summary

The 21st Annual Symposium of the Kenya Association of Hotelkeepers and Caterers (KAHC) brought together over 140 delegates representing a dynamic cross-section of the hospitality industry—including government, private sector, academia, sponsors and tourism practitioners—to deliberate on strategies for propelling Kenya towards the national target of five (5) million international tourist arrivals by 2027.

The Opening Session set a strong foundation for the two-day event, with thought-provoking messages from industry leaders. KAHC CEO *Mike Macharia* challenged the sector to take a firm stand on youth empowerment, noting that over 80% of the hospitality workforce is under the age of 35. Against the backdrop of national unrest and generational change, he urged stakeholders to foster leadership opportunities for young people and adopt a clear sector-wide position. KAHC Chairman *Chris Musau* underscored the importance of infrastructure, public-private partnerships, and product diversification. He welcomed the KES 13 billion budgetary allocation to the tourism sector and emphasized that achieving five million arrivals will require coordinated action across national and county levels.

Mr. Mohammed Osman (Mombasa County) reaffirmed Mombasa's commitment to tourism growth, pointing to the launch of the Mombasa Tourism Council and highlighting the urgent need for improved aviation connectivity and MICE development. *Hon. Governor Gladys Wanga* made a surprise appearance at the Symposium, delivering a compelling pitch to the hospitality sector to invest in Homa Bay County. She highlighted the county's natural assets and untapped potential, and affirmed her government's strong commitment to working with investors to unlock new tourism opportunities.

Session Highlights

The Symposium featured seven thematic sessions, each aligned to the overarching theme “Towards 5 Million”, and focused on unlocking strategic opportunities to grow Kenya's tourism sector through innovation, partnerships, policy, investment, and capacity building.

Below are the key highlights from each session:

- **Session 1 - Kenya's Potential as a MICE Destination:** Amanda Kotze-Nhlapo from the South Africa National Convention Bureau emphasized that Kenya has significant potential as a MICE hub but lacks the infrastructure, air connectivity, and coordination needed to compete globally. She urged the establishment of a

fully empowered National Convention Bureau, targeted investment in event-specific training, and policy reforms to enhance visa access and delegate mobility.

- **Session 2 - The Role of Pension Schemes in the Development of Tourism:** Evans Ombui of the National Social Security Fund (NSSF), speaking on behalf of the Managing Trustee, addressed the sector's low compliance with pension registration and the untapped potential of pension funds to finance tourism infrastructure. He called on tourism employers to formalize their workforce and collaborate with NSSF on viable investment projects.
- **Session 3 - Building Human Capacity for Tourism Growth:** This session spotlighted the need to modernize Kenya's tourism training landscape. Ambassador Mwakai Sio and Principal Mark Oginde called for urgent investment to reposition Kenya Utalii College as a Centre of Excellence. Patrick Kimamo of Boma International Hospitality College (BIHC) highlighted the college's role in bridging the tourism skills gap through practical, industry-aligned training, including 70% job placement, short courses, and certification for experienced workers through Recognition of Prior Learning (RPL). Elsa Lunani of DSTV emphasized the role of tailored content in improving guest experience and urged hotels to treat entertainment as a strategic differentiator.
- **Session 4 - Telling Tourism Stories for Increased Visitor Arrivals:** Agatha Juma of Engage Talk underscored that storytelling is Kenya's untapped competitive edge. The sector's marketing remains too transactional and lacks emotional resonance. She urged hotels and tourism players to empower frontline staff as storytellers, use digital platforms to share human-centred content, and position storytelling as a strategic business tool.
- **Session 5 - Role of Kenya Tourism Board (KTB) in Destination Marketing:** Francis Gichaba, Chairman of the Kenya Tourism Board, outlined KTB's efforts in product diversification but emphasized that "KTB cannot market what doesn't exist." He identified poor visibility of unique local offerings and weak collaboration as major constraints. His call to action was for tourism stakeholders to innovate, develop distinctive experiences, and partner with KTB to amplify them globally.
- **Session 6: The Role of Research in Achieving 5 million:** David Gitonga, Acting CEO of the Tourism Research Institute (TRI), underscored the critical role of data and research in reaching the five million visitor target. He highlighted Kenya's steady growth in arrivals but stressed that fragmented data systems and limited tracking of the full visitor journey weaken planning. He called for stronger data integration, a National Tourism Data Observatory, and wider use of predictive analytics to support evidence-based decision-making across the sector.
- **Session 7 Leveraging Digital Payments to Power Tourism:** Jonathan Curtis (American Express) and Eva Ngigi (Equity Group) spoke on the strategic role of digital payments in tourism growth. They noted that while payment systems are in place, their potential to enhance guest experience and generate market insights is underutilized. They urged the sector to adopt more integrated payment technologies and leverage transaction data to improve product development and destination management.

Achieving the Five (5) Million Number

As part of the plenary discussion, participants were invited to candidly assess the realism and feasibility of Kenya reaching five (5) million international tourist arrivals by 2027. This came after a presentation highlighting a 2.6% annual growth in arrivals and reaffirming the government's target to achieve the milestone within three years. The moderator posed a pointed challenge: *"What comes to mind when you hear about the 5 million goal?"*

While the ambition was widely acknowledged, many viewed the target as aspirational rather than actionable, unless supported by credible forecasts, expanded air connectivity, and equitable regional inclusion. Frustrations surfaced around slow government responsiveness, lack of meaningful stakeholder consultation, and a disconnect between tourism policies and on-the-ground realities.

In the Closing Session, *Mike Macharia* thanked participants for their active engagement and praised the Symposium's productive, collaborative discussions.

Opening Remarks

Mike Macharia

Chief Executive Officer

Kenya Association of Hotel Keepers and Caterers (KAHC)

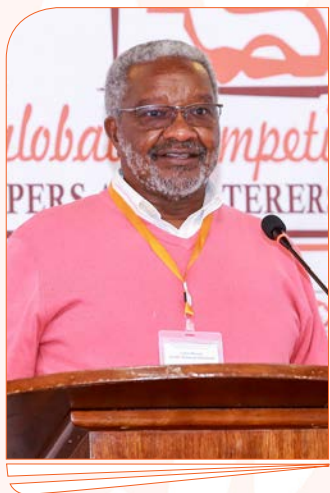
Mike Macharia began by expressing his appreciation to all participants for attending the 2025 KAHC Conference. He raised a logistical consideration regarding the venue of the next Symposium, questioning whether it should be held at the coast, given the current challenges of congestion and limited accommodation caused by high tourist bookings during the peak tourism season.

He also reflected on the broader national context, noting that the country was at a crossroads, particularly in light of the Gen Z protests. He emphasized that this was a crucial conversation for the hospitality industry to engage in. Macharia called on the sector to adopt a clear position by the end of the Symposium, especially considering that approximately 80% of the industry's workforce comprises youth under the age of 35. He urged stakeholders to create an environment and opportunities that empower young people to take leadership roles within the sector, arguing that the industry must not only acknowledge but actively prepare for a generational shift. He concluded by stressing the urgency of initiating this important discussion.



Chris Musau

KAHC National Chairman



Mr. Chris Musau welcomed delegates to the Kenya Association of Hotel Keepers and Caterers (KAHC) 21st Annual Symposium, themed "Towards 5 million." He expressed appreciation to both county and central government officials for their continued support, noting that this partnership had enabled KAHC to maintain its high standards.

He acknowledged the government's significant financial commitment to the tourism sector in the 2026 budget, highlighting the allocation of KES 13 billion—KES 8.2 billion to the Tourism Fund and KES 4.8 billion to the Tourism Promotion Fund—as a vital step toward strengthening the industry and advancing Kenya's economic growth.

Reflecting on the performance of the tourism sector, he noted that 2024 had seen encouraging signs of recovery, despite global uncertainties.

Tourism arrivals stood at 2.394 million, from 2.089 million in 2023. He emphasized the importance of increasing air capacity at JKIA and Moi International Airport, building convention centers in Nairobi and Mombasa, and enhancing the country's promotional strategies.

Turning to the symposium theme, Musau reiterated the goal of achieving 5 million tourist arrivals by 2027. He emphasized that this was attainable through diversification of tourism products across different circuits, attracting a wider market segment, and aligning the policy and regulatory framework with evolving sector needs.

He welcomed the government's ongoing review of the Tourism Policy and Act, and stressed the importance of strengthening the country's capacity to host meetings, incentives, conferences, and exhibitions (MICE). He also called for deeper partnerships with county governments, improved enforcement of quality standards, and a focus on capacity development, innovation, and data-driven decision-making.

Musau concluded by urging a more collective and inclusive approach to tourism development, engaging all stakeholders in the implementation of sector initiatives. He noted that the Symposium's lineup of provocative and insightful speakers would provide valuable opportunities for learning and idea-sharing. He underscored the limitless potential for investment and job creation, provided the sector is well-nurtured.

Chris Musau concluded his remarks by introducing the following KAHC Board members: Cathrine Murage (National Treasurer), Dr. Florence Njau (Nairobi Region), Kennedy Ayoti (Sopa Lodges), Maureen Awuor (Kilifi Region), Sven Kampa (Diani Sea Lodge & Diani Sea Resort), Vickram Korla (Neptune Hotels), and Wasike Wasike (Heritage Hotels).

Mohammed Osman Ali

CEC-Trade and Tourism, County Government of Mombasa

Mr Mohammed Osman Ali began his remarks by conveying apologies on behalf of the Governor of Mombasa, Abdulswamad Shariff Nassir, who was unable to attend the KAHC Symposium due to his commitment to mark the International Day Against Drug Abuse and Illicit Trafficking.

He expressed his honour in representing the Governor at what he described as a pivotal gathering and applauded the Symposium's theme, "*Towards 5 Million*", calling it bold, strategic, and timely. Reflecting on Kenya's recent tourism performance, he noted that the country had recorded approximately 2 million visitors in 2023, which rose to 2.5 million in the 2023–2024 period. This, he said, was an encouraging sign that the target of 5 million visitors was not merely aspirational but truly achievable.

Mr Osman pointed out that Kenya currently ranks sixth in Africa in terms of tourism arrivals, while South Africa holds the fourth position with approximately 8.9 million visitors. Based on these comparisons, he asserted that Kenya should aim not only to meet the 5 million target by 2027 but even strive to reach it by 2026, with the right strategies and stakeholder collaboration.

To reinforce his point, he offered a comparison with Zanzibar, a destination he said shared the same culture and demographic profile as Mombasa. In 2024, Zanzibar received about 740,000 visitors, of whom 74% arrived via direct international flights. By contrast, only 8% of Kenya's 2.5 million visitors entered through Mombasa International Airport. He questioned this disparity and challenged stakeholders to reflect on why Mombasa was lagging despite its strategic location and tourism appeal. He emphasized that meaningful action must follow bold ambitions, including better aviation connectivity and investment in infrastructure.

Turning to the Meetings, Incentives, Conferences, and Exhibitions (MICE) sector, Mr Osman noted that Kenya had hosted just 375,000 international delegates. He asked whether this volume could realistically support the 5 million visitor goal and urged deliberate efforts to enhance Kenya's ability to attract and host international events.

To support stakeholder coordination at the county level, Mr Osman announced the formation of the Mombasa Tourism Council. He described it as a dedicated platform that brings together all tourism stakeholders to address industry issues collaboratively and present recommendations to both county and national governments. He noted that the council was created to amplify the sector's voice and align efforts across different levels of governance.

He recognized the KAHC Symposium as a critical space for reflection, celebration, and consensus-building. He urged participants to use the platform to generate actionable ideas, shape future-focused policies, and drive investments. Drawing from the insights of policymakers, investors, private sector leaders, academics, and development partners, he said, would be essential in creating a thriving tourism ecosystem.



Mr Osman stressed that no single county could achieve the 5 million goal in isolation. Realising such a target would require competitive marketing, product diversification, and, above all, trust-based partnerships rooted in transparency and shared values.

In conclusion, he commended the Kenya Association of Hotelkeepers and Caterers (KAHC) for its leadership in convening the industry and reaffirmed the commitment of the County Government of Mombasa to walk this journey alongside all stakeholders. He closed by reiterating Mombasa's continued partnership in positioning both the city and Kenya as premier travel destinations, stating confidently: *"Together, we are truly moving towards 5 million."*

Guest Speaker - H.E. Governor Gladys Wanga

Governor, Homa County

H.E. Governor Gladys Wanga extended a bold and timely invitation to hotel and hospitality investors: to consider Homa Bay County as Kenya's next major frontier for tourism development. With its vast lakefront, rich biodiversity, and rising profile as a tourism destination, Homa Bay is ready for investment. Backed by a clear county vision, improving infrastructure, and strong government support, Homa Bay presents a unique opportunity for investors seeking untapped potential and first-mover advantage in Kenya's hospitality sector.

Below is a detailed overview of H.E. Governor Wanga's pitch, outlining strategic advantages, immediate investment-ready opportunities, and the enabling environment created to attract and support private sector participation.



Homa Bay's Strategic Location and Natural Beauty

- Homa Bay controls 80% of Kenya's share of Lake Victoria, earning it the title 'The Lake County of Kenya'
- Scenic beauty anchored by Homa Hills, white sandy beaches, and crater lakes like Simbi Nyaima
- Home to 16 pristine islands—ideal for eco-tourism and resort development

Only 2 hours by road or 15 minutes by flight from the Maasai Mara

Unmatched Attractions and Untapped Potential

- Ruma National Park: The only park in Kenya hosting the endangered Roan Antelope, plus buffalo, giraffes, and 3 of the Big Five
- Simbi Nyaima Crater Lake: A mystical flamingo destination
- Bala Hot Springs and volcanic formations
- Historic and cultural heritage with growing domestic appeal

Current Gap = Massive Opportunity

H.E. Governor Wanga highlighted that Homa Bay lacks sufficient accommodation capacity:

- Visitors to Madaraka Day and the upcoming Devolution Conference (12,000 delegates) had/have no adequate local hotels
- Tourists and delegates are forced to stay in neighbouring counties
- This points to a critical need and immediate opportunity for hospitality investments, especially hotels, lodges, and resorts.

Hospitality Investment Opportunities Available Now

Opportunity	Details
Prime Lakefront Land	The county government of Homa Bay is relocating offices to free up lakefront land, available for free to serious investors
Tented Camps in Ruma National Park	Temporary luxury camps for the Devolution Conference, supported by KWS and KTB
100 Acres at Riwa SEZ	For resort or golf development near Bala Hot Springs, within a hospitality investment zone
Lakefront Properties	Additional parcels available for hotel or eco-lodge development
Island-Based Development	16 islands ready for eco-tourism, retreats, and adventure tourism
Cruise Infrastructure	Piers available for cruise ships connecting to Mwanza and the Serengeti

Infrastructure Readiness

- Kabunde Airstrip handles three flights/day, expanding to accommodate Embraer aircraft by 2026
- Kenya Airways is expected to land in Homa Bay soon
- Road upgrades and ferry systems are underway
- Lakefronts are being cleared for private development

Strong Government Support & Incentives

- The county offers land for free to committed hospitality investors
- Full support from the county administration
- Coordination with national tourism agencies (KWS, KTB)
- Upcoming 'Experience Homa Bay Tour' for potential investors

Call to Action: Invest Now

H.E. Governor Wanga closed by aligning her pitch with the national agenda:

"If we are going to move from two to five million tourists, the facilities must be diversified across the country... and Homa Bay is one such place."

Kenya's Potential as a MICE Destination

1.0 By Amanda Koetze-Nhlapo

Introduction

Amanda Koetze-Nhlapo opened her presentation with a powerful affirmation of Africa's identity and storytelling legacy. She emphasized that Africa is not only the cradle of humankind but also a continent of immense emotional, cultural, and business value, making it a compelling destination for global MICE (Meetings, Incentives, Conferences, and Exhibitions) events.

She challenged the audience to see beyond traditional tourism and recognize business events as a strategic economic tool, not just an offshoot of tourism. Amanda advocated for positioning Kenya as a premium business destination, leveraging its landscapes, culture, emerging infrastructure, and strategic location to claim a greater share of the global MICE market.

Below are key highlights of her presentation:



Market Challenges Facing Kenya as a MICE Destination

- **Air Connectivity Gaps:** A 21% deficit in intra-Africa air connectivity hampers seamless travel for delegates. She cited her own travel from South Africa to Mombasa (taking over 8 hours) as an example of logistical friction that must be solved through policy reform and industry cooperation.
- **Insufficient Infrastructure:** Gaps in transport, mobility, venue quality, and accommodation standards limit Kenya's ability to host large, high-profile events. She warned against building "white elephant" venues without strategies to fill them through continuous programming.
- **Visa Restrictions and Bureaucracy:** Amanda flagged the difficulty of visa access even between African countries, including an example of a Rwandan conference planner unable to travel to South Africa. She called for Kenya to lead in visa facilitation for MICE delegates.

- **Perception and Security Concerns:** Africa continues to face external stereotypes about instability, safety, and infrastructure. She argued that MICE events themselves can be used to shift perceptions — if they are well-executed and policy-backed.
- **Skills Gap:** Many hospitality workers lack the specialized skills needed for event planning, sales, and MICE logistics. Youth inclusion and targeted training were emphasized as urgent.

Competitive Analysis - Benchmarking Against MICE Leaders

Amanda offered a practical comparative analysis to show how Kenya stacks up and what it can learn:

- **Lessons from South Africa:** Cape Town became a MICE leader by establishing the first Convention Bureau on the continent, followed by a national bureau. Kenya, she urged, should replicate this model and empower its own Convention Bureau with autonomy, resources, and private sector backing.
- **Global Competitors - Singapore & Dubai:** Singapore: Offers strategic subvention programs, AI integration, and economic alignment of MICE with national development. Dubai: Attracts global MICE traffic with policies like 10-year golden visas for business delegates, and an association headquarters strategy.
- **Kenya's Regional Opportunity:** East Africa is uniquely positioned with its blend of wildlife, beaches, and urban centers, but Amanda asked: "Are you marketing Kenya as a business destination with safari extensions, or just as a leisure hotspot?" She urged Kenya to shift its messaging and infrastructure to match its natural competitive advantages.

Key Approaches to Positioning Kenya as a MICE Destination

- **Reframe MICE as a Business Sector (Not Just Tourism):**
 - o The MICE sector consumes tourism but is driven by business objectives — knowledge exchange, investment, and policy influence.
 - o Treat MICE as a separate, economically strategic sector, requiring its own policy frameworks, strategies, and capacity development.
- **Establish a Fully Functional Convention Bureau:**
 - o A National Convention Bureau is essential for marketing, coordinating, and bidding for international events.
 - o South Africa's success is attributed to Cape Town's dominance in the MICE sector, due to its early establishment of a dedicated convention bureau.
- **Invest in Skills Development Specific to Business Events:**
 - o Selling hotel rooms is not the same as selling Kenya as a MICE destination.
 - o Specialized training in event planning, bidding, sales, logistics, and hospitality management is needed.
 - o Youth inclusion and professional development pathways are crucial.
- **Strategic Bidding and Co-opetition:**
 - o MICE bidding requires a unified national effort, quality accommodation, infrastructure, and client-focused proposals.

- o The concept of "co-opetition" is that African countries collaborate even while competing by supporting event rotation across the continent.
- ***Strengthen Infrastructure & Connectivity:***
 - o Kenya must address air connectivity gaps, logistical inefficiencies, and urban congestion to attract high-calibre events.
 - o Improving intra-city mobility and seamless delegate experience is critical.
- ***Build Policy and Visa Frameworks:***
 - o Only 12% of African countries have clear MICE strategies.
 - o Need for visa facilitation, tax incentives, and public-private partnerships to create an enabling environment.
- ***Leverage Cultural Identity and Experiential Travel:***
 - o International delegates seek authentic, immersive experiences — drumming, food, storytelling, and landscapes.
 - o Kenyans should sell the real Kenya and not shy away from showcasing culture.
- ***Expand the Role of the Private Sector:***
 - o Hotels, venues, PCOs, and suppliers must take on advocacy and strategic roles, not just wait for business.
 - o Businesses should partner with Convention Bureaus and support national bidding efforts.
- ***Adopt Incentive and Subvention Programs:***
 - o Kenya should introduce support programs for conference bidding and hosting, similar to Singapore's global leader model.
 - o Amanda clarified that subvention is not bribery, but facilitation to ease the event hosting process.
- ***Enhance Digital and AI Integration:***
 - o Develop AI-driven booking systems, virtual tours, CRM platforms, and event tech to remain competitive.
 - o Caution was raised about blindly copying AI content — local authenticity matters.
- ***Segment and Target Economic Sectors:***
 - o Kenya should map and engage its key sectors (e.g., agriculture, tech, health) and attract related conferences and exhibitions.
 - o Aligning MICE strategy with economic development goals can bring investment and knowledge transfer.
- ***Benchmark Globally but Localize the Experience:***
 - o Kenya must compare itself to destinations like Singapore and Dubai but offer localized, inclusive, and sustainable alternatives.
 - o Site inspections, storytelling, and seamless service delivery are key to MICE success in Kenya.

Conclusion

Amanda's core message: Kenya has everything it takes to become a leading MICE destination, but it must activate its assets through strategy, structure, partnerships, and pride in its identity. Business events are a powerful lever for tourism growth, economic transformation, and global rebranding — and Kenya must step forward boldly to claim its share.

PLENARY DISCUSSION

The following is the feedback from the discussions:

- ***Shortage of Qualified Event Organisers:*** South African professional conference organisers (PCOs) are in high demand across the continent due to a widespread shortage of qualified event professionals. This highlights a pressing skills gap in countries like Kenya, where the demand for world-class event organisers is growing but local capacity remains limited.
- ***Professionalisation of the MICE Workforce:*** The Southern African Communications Industries Association (SACIA) offers certifications and professional development and promotes industry standards for event planners. This model illustrates how structured accreditation and skills-building frameworks can support the growth of a competent MICE workforce.

1.1 Remarks by Charles Okeyo

Tourism Fund

Speaking on behalf of the CEO of the Tourism Fund, who was away on official duty, Charles Okeyo affirmed the Fund's commitment to continue partnering with the Kenya Tourism Board (KTB), investors, and stakeholders to help the country attain—and even surpass—the 5 million visitor mark. He thanked industry players for their ongoing support and encouraged continued collaboration to ensure that benefits flow back into the sector.

Mr. Okeyo also made key recommendations toward achieving the 5 million mark, emphasizing the need to broaden the focus beyond international arrivals. He recommended the following:

- Strengthen focus on the domestic tourism market by actively marketing travel packages to local consumers and expanding outreach within the Kenyan population.
- Invest in future travellers by promoting and supporting tourism clubs in primary and secondary schools, with the aim of nurturing a culture of travel among children and youth.



1.2 Remarks by Mr Samson Some

Chairman Tourism Fund

Samson Some, the chairman of the Tourism Fund, stated that tourism product development remains a central focus of the Fund. He noted that the board has worked closely with Tourism Fund management to drive this agenda.

He emphasized that having natural attractions like the Maasai Mara or beaches is not enough; such features must be deliberately developed into products that attract visitors. He commended efforts that have successfully grown domestic tourism, which now accounts for nearly 50% of hotel occupancy in Kenya, a shift from the late 1990s when it was not even recognized in official tourism planning.

Mr. Some highlighted that the Tourism Fund is actively engaging with the National Social Security Fund (NSSF) to access non-government financing, including pension funds, to support MICE (Meetings, Incentives, Conferences, and Exhibitions) development. He acknowledged Rwanda's success in this space and noted Kenya must now accelerate efforts to position itself competitively. He further supported the Governor's call for product and destination diversification as a key pathway toward achieving the 5 million visitor target.

On capacity building, he reported that the Fund has revamped its efforts through collaboration with KAHK and TVETA under the Recognition of Prior Learning (RPL) framework. This is expected to significantly improve the quality and employability of personnel in the tourism sector.

He also mentioned efforts to operationalize the Ronald Ngala Utalii College (RUC) training



facility, acknowledging delays caused by economic constraints but affirming the Fund's commitment to its completion and activation. He stressed that these delays should not hinder progress in other areas.

Finally, Mr. Some underlined that the Tourism Fund is mandated to mobilize resources beyond the 2% industry levy. He announced that a new framework is now in place to tap into external, non-governmental funding for tourism product development, describing this as a potential game-changer for the sector. Drawing on the transformation of Laikipia and mountain regions in the early 2000s, he expressed confidence that strategic partnerships—both local and international—can unlock similar growth across other regions of the country.

The Role of Pension Schemes in the Development of Tourism

2.1 By Evans Ombui

National Social Security Fund (NSSF) on behalf of the Managing Trustee

Evans Ombui stated that NSSF is ready to partner with the tourism and hospitality sector to support its growth. Speaking on behalf of the Managing Trustee, he affirmed that the Fund is willing to mobilize long-term capital, including pension funds, to invest in tourism infrastructure and MICE development. He emphasized NSSF's commitment to alternative investment avenues that can yield sustainable returns while also contributing to Kenya's national development goals.



Low Social Security Coverage in the Sector

Ombui pointed out that only 12% of employers in the hospitality industry are currently compliant with social security contribution requirements. He noted that coverage remains especially low in the informal sector, where many workers lack access to any form of social protection. He urged stakeholders to prioritize wider registration of employees, including those in domestic and informal employment, to ensure broader access to social security benefits.

NSSF's Transformation Agenda by 2027

He outlined NSSF's strategic goals under its transformation agenda, targeting the year 2027. These include plans to:

- Increase membership by one million new contributors,
- Raise member and employer satisfaction levels to 95%,
- Reduce benefits processing time to under 10 working days,
- Grow the total fund value to KES 1 trillion, and
- Maintain a two-digit annual interest rate for members' savings.

Additionally, NSSF is working to reduce administrative costs to 1.5% of the fund portfolio, which is in line with regulatory requirements.

Investment Opportunities in Tourism-Linked Infrastructure

He noted that NSSF is currently exploring alternative asset classes, including investment opportunities directly linked to tourism infrastructure. While pursuing diversification, he stressed that all investments will be guided by compliance with regulatory frameworks such as those set by the Retirement Benefits Authority (RBA) and international labour standards.

He further reiterated NSSF's interest in building strategic partnerships with both public and private sector players to support destination development and shared national goals.

Call to Action for Industry Stakeholders

Tourism stakeholders to actively support the Fund's mission by:

- Registering all employees, both formal and informal, with NSSF,
- Promoting compliance through sector associations and town hall forums,
- Collaborating on viable investment projects such as hotels, conferencing facilities, and MICE venues, and
- Encouraging a culture of savings and retirement planning to enhance workforce retention and long-term welfare.

PLENARY DISCUSSIONS

The following were the key outcomes of the discussions:

Q1: What is NSSF doing to support registration and deductions for casual workers?

Response: All workers—including casuals—must be registered and covered under the current law. Although it acknowledged the administrative burden for short-term engagements, it noted that employers can register casuals instantly using USSD (*303#). NSSF is also reviewing the Act to ease compliance challenges and is actively sensitizing both employers and workers through its compliance officers.

Q2: Does NSSF pay severance benefits?

Response: No. NSSF does not pay severance benefits. Under the Employment Act, severance is only applicable where there is no pension scheme. Since NSSF now operates both a national pension scheme (Tier I) and a provident fund (Tier II), employees covered under these do not qualify for severance pay.

Q3: How can the tourism sector access NSSF investment support for tourism-related projects?

Response: NSSF indicated it is open to exploring tourism-related investments, provided they align with existing regulations. The sector was advised to submit proposals for review against NSSF's investment criteria. All investments must comply with Retirement Benefits Authority (RBA) guidelines and fall within approved asset class limits.

Q4: Is NSSF close to breaching investment limits on Treasury Bills?

Response: NSSF acknowledged high allocations in Treasury Bills but confirmed that all investments are within regulatory limits. It emphasized that portfolio allocations are guided by RBA regulations and that diversification strategies are being explored without breaching investment caps.

Building Human Capacity as a Driver of Tourism Development

3.1 Revamping Kenya Utalii College (KUC)



Presentation by KUC Alumni

This session focused on the future of KUC as it marked 50 years of service to the hospitality industry. Speakers—many of them distinguished alumni—reflected on the institution's legacy, its current challenges, and the urgent need to revamp it into a Centre of Excellence. The discussion underscored KUC's pivotal role in producing industry leaders and called for bold, coordinated action to restore its relevance and infrastructure.

Below are the remarks shared by various alumni and stakeholders, along with the specific Calls to Action they raised toward revamping KUC.

Key Messages from Speakers

- Ambassador Mwakai Sio – Former Principal, Kenya Utalii College:** Ambassador Sio recalled spending 27 years at KUC, 17 of them as principal, and described the college as the bedrock of hospitality training in Kenya. He acknowledged that the

institution had faced serious challenges over the past 20 years but believed it could be revived with the right commitment. He noted that efforts to reposition KUC—first through a UNWTO Centre of Excellence initiative and later through a Swiss-funded restructuring plan—were both undermined by political interference. He urged the sector to seize the 50th anniversary as a chance to reposition KUC as a regional Centre of Excellence.

- **Gerson Musimi – Chairman, Tamarind Management:** Gerson Musimi stated that more than half of Kenya’s hospitality professionals were trained at KUC. He emphasized the importance of keeping political interference out of KUC and called on the private sector, particularly the Tourism Fund and NSSF, to invest in rehabilitating the college’s infrastructure. He added that KUC alumni are leading institutions not only in Kenya but across East and Central Africa.
- **Pauline Nduva – Operations Manager, Diani Sea Resort:** Pauline Nduva credited KUC for playing a transformational role in her professional journey and highlighted its significance in advancing gender equity in the sector. She described the institution as a pioneer in affirmative action, noting that it provided pathways for women in an industry previously dominated by men. She called for continued support to ensure KUC remains a launchpad for future leaders.
- **Wasike Wasike – Group Operations Manager, Heritage Hotels:** Wasike provided a global comparison of tourism trends, noting that Spain receives nearly 100 million visitors annually, compared to Kenya’s 2.5 million. He emphasized that KUC must be central to workforce development if Kenya aims to grow its visitor numbers. He suggested KUC should function like the Kenya School of Law, standardizing hospitality training nationally. He also expressed concern over the lack of government presence at such a critical event and urged greater public sector engagement.
- **Dr. Florence Njau – Board Member, KAHC:** Dr. Njau described KUC as foundational to her career, which has taken her from hotel management to doctoral studies. She affirmed her belief that KUC can and should be a regional Centre of Excellence and urged stakeholders to contribute towards its revitalization.
- **Mark Oginde – Principal, Kenya Utalii College:** Mark Oginde said he was honoured to lead an institution that had produced many of the sector’s top professionals. He announced that revamping KUC is a top priority, and outlined ongoing partnerships with institutions such as Boma College, IHTI, Strathmore University, and various public universities. He introduced an “Adopt-a-Block” model for stakeholders to support specific hostels, such as Serena Block or Whitesands Block. He highlighted KUC’s unique blend of practical training via the Utalii Hotel and cruise-ship placement programs, and committed to showcasing visible improvements by the next Symposium.

Key Issues Raised

- Kenya’s tourist arrivals remain low compared to global benchmarks, reflecting untapped market potential.
- Training quality and standardization are inconsistent across institutions; KUC could serve as the regulatory benchmark.
- KUC’s infrastructure is deteriorated and no longer reflects its legacy.

- There is a visible absence of government engagement, even at high-level sectoral events, signaling weak political prioritization.
- There is a need to harmonize fragmented training efforts across institutions to restore Kenya's global reputation for excellence.

Call to Action on Revamping Kenya Utalii College:

- Reposition KUC as a national and regional Centre of Excellence for hospitality and tourism training.
- Launch a bold, industry-led turnaround strategy tied to KUC's 50th anniversary.
- Mobilize funding from the Tourism Fund, NSSF, and private sector to upgrade outdated infrastructure.
- Establish KUC as the national standard-setting body for all hospitality training institutions.
- Promote strategic partnerships with universities and hospitality colleges to modernize the curriculum.
- Adopt the "Adopt-a-Block" initiative, where stakeholders support the refurbishment of student facilities.
- Integrate KUC into the national tourism growth agenda, including cruise tourism and MICE workforce development.
- Keep politics out of institutional management and reinforce merit-based governance and accountability.

3.2 Boma International Hospitality College (BIHC)



Presentation by Patrick Kimamo

Business Development Manager, Boma International Hospitality College

Patrick Kimamo delivered a high-energy and reflective presentation focused on the urgent need to develop a skilled, agile, and future-ready workforce for Kenya's hospitality sector, particularly in view of the national goal to attract 5 million tourists. He emphasized that hospitality is a human-centered industry and that quality service, not just destination features, will define competitiveness. His presentation unpacked capacity gaps in training, the mismatch between classroom instruction and industry needs, and showcased how BIHC is tackling these challenges head-on through curriculum innovation, industry collaboration, and experiential learning models.

Below are the key highlights of his presentation:

Training and Skills Gaps in the Hospitality Industry

- Mismatch between training and industry needs, leading to unemployable graduates.
- Overemphasis on academic theory (e.g., calculus for chefs) instead of technical and soft skills.
- Lack of entrepreneurship and sales training for waiters, denying them the opportunity to upskill in areas like cross-selling and upselling.
- Hospitality systems that overburden staff and are driven more by compliance than guest experience (e.g., outdated guest registration practices).
- Legislation and standards imported without local validation, such as arbitrary service rules (e.g., 3-second rule), not adapted to the Kenyan context.
- A shortage of certified event managers and pastry chefs limiting Kenya's competitiveness in specialized hospitality areas.
- Inflexibility in traditional training models, which don't accommodate lifelong learning or busy work schedules.

What Sets BIHC Apart

- *Industry-Aligned Curriculum:*
 - BIHC regularly engages industry professionals to review and co-design curricula, ensuring alignment with real-world needs.
 - They have removed irrelevant academic content (e.g., calculus for chefs) and replaced it with practical, job-focused training.
- *Wide Program Range:*
 - Offers Diploma and Certificate courses in Culinary Arts, International Hotel Management, Baking & Pastry, Event Management, Mixology, and Barista training.
 - Introduced language training and Saturday classes for hobbyists and professionals seeking global cuisine skills.

- **Dual Vocational Training Model:**
 - o BIHC runs a 30% classroom, 70% industry placement model, ensuring students gain on-the-job experience.
 - o Successfully applied this model in projects such as the KCB Foundation hospitality skilling programme, training over 1,000 individuals.
- **Recognition of Prior Learning (RPL):**
 - o BIHC certifies experienced hospitality workers without formal qualifications, helping to close competency gaps and retain local expertise.
- **Micro-Credentialing and Co-Branded Training:**
 - o They co-develop training programs with hotels (e.g., Sarova), offering modular certifications that accumulate into formal qualifications.
 - o Enables on-the-job training without disrupting operations, ideal for upskilling busy staff.
- **Strong Alumni and Placement Network:**
 - o Maintains a growing alumni board and industry placement program.
 - o Currently supports over 1,000 learners, including 400 in active placements within the industry.
- **Global Impact and Partnership:**
 - o BIHC has trained staff at the Ethiopian Skylight Hotel (over 1,100 rooms), improving their service rankings dramatically.
 - o Collaborates with local and international bodies such as KAHC, KCB Foundation, and the Ministry of Foreign Affairs.
- **Coffee & Culinary Storytelling**
 - o Emphasized Kenya's coffee heritage through immersive training—from farm to cup—aimed at positioning Kenya globally in premium experiences.

How BIHC is Responding to Sector Needs

- Designing relevant, experience-based training with constant feedback from industry players.
- Providing short courses, modular learning, and RPL certification to broaden access to professional growth.
- Implementing dual training models that emphasize job placement and practical exposure.
- Offering in-house certification for hotel-based training programs (micro-credentials).
- Creating career pipelines for hospitality workers, whether they are new entrants or experienced staff seeking formal recognition.
- Training and exporting Kenyan excellence to international settings (e.g., Ethiopia's largest hotel).
- Promoting innovation and localized research through an in-house research department that audits training relevance and market trends.

3.3 DSTV for Business

By Elsa Lunani

Introduction



Elsa Lunani from DSTV for Business delivered a practical and engaging presentation on how customized content solutions can elevate the hospitality experience and support Kenya's target of attracting 5 million visitors. She highlighted DSTV's role not just as a content provider but as a strategic partner for hotels, lodges, serviced apartments, and entertainment venues. The presentation showcased DSTV's tailored packages, digital tools, and support systems designed to help hospitality providers offer comfort, familiarity, and cultural relevance to both local and international guests.

The following are the highlights of the presentation:

Tailored Content Packages to Match Every Hospitality Setting

Elsa introduced DSTV's three specialized commercial offerings that align with different hospitality environments:

- **DSTV Stay** – Designed for guest-facing areas in hotels and lodges, this package offers a diverse mix of content including international news, premium sports (e.g., Premier League, Champions League), kids' entertainment, lifestyle shows, and movies. It ensures guests feel entertained, informed, and at home, regardless of their origin.
- **DSTV Play** – Built for public viewing areas like restaurants, lounges, and bars. It's curated to create vibrant, communal entertainment—ideal for sports nights and social gatherings, driving foot traffic and enhancing the guest experience.
- **DSTV Work** – Created for staff entertainment and wellness, ensuring hotel and resort staff have morale-boosting content in their break areas. This contributes to better staff retention and productivity.

Local and Global Content Integration to Enhance Guest Experience

Elsa emphasized that DSTV understands that entertainment is part of hospitality service delivery. DSTV for Business provides:

- Foreign language channels such as German, French, Asian, and Indian content to cater to international tourists, making them feel seen and valued.
- Strategic partnerships that enable Kenyan destinations and hotels to feature in global shows on platforms like NatGeo and Showmax. This boosts destination marketing—"many tourists come to see what they saw in a movie."
- Special content curation for kids and families, enhancing the appeal of family-friendly accommodations.

New Product for Serviced Apartments and Executive Residences

DSTV recently launched a flexible business-facing home entertainment solution for:

- Serviced apartments
- Boutique hotels
- Executive floors and suites

This product includes:

- Centralized billing for easier financial control
- Bulk hardware discount incentives
- Access to residential-style content, preferred by long-stay or high-value guests

Technical Support and Partnership Approach

Elsa stressed that DSTV for Business goes beyond selling packages—it offers dedicated account management and after-sales support:

- A hospitality support team (including named account reps like Nancy and Moses) helps clients manage installations, hardware upgrades, troubleshooting, and queries.
- DSTV provides advisory services for optimizing content mix and digital upgrades (IPTV transitions, screen planning, etc.).
- Subsidies are available for hotels upgrading from analogue to digital platforms, helping to reduce upfront costs.

Digital Self-Service Platform

DSTV for Business now offers a modern self-service portal that allows hospitality clients to:

- View and download invoices and statements
- Manage subscriptions and packages in real time
- Log service or support requests directly
- Track account history, hardware assets, and usage analytics

Special Offers and Loyalty Promotions

Elsa highlighted a range of seasonal promotions designed to reward loyal customers and reduce onboarding friction for new ones:

- Free package upgrades are available on select DSTV and GoTV subscriptions.
- Holiday bundles and business loyalty offers.
- Partner campaigns where DSTV collaborates with suppliers, events, or travel companies.

Telling Tourism Stories for Increased Visitor Arrivals

By Agatha Juma

Director, Engage Talk



Session Introduction

Agatha Juma, Director of Engage Talk and a former CEO of the Kenya Tourism Federation, delivered a powerful and engaging presentation on the critical role of storytelling in Kenya's tourism growth strategy. Her focus was on how emotional connection, not just information, drives decisions, and how hoteliers, staff, and everyday experiences must be part of the narrative if Kenya is to attract and retain five (5) million annual tourists. Drawing on science, personal anecdotes, and digital trends, she challenged the industry to shift from transactional marketing to authentic, people-driven stories, underscoring the fact that "Emotion will take you places where logic never will."

Key Insights and Takeaways

- ***Kenya's Competitive Edge Lies in Its Stories, Not Just Its Scenery:*** Agatha reminded the audience that many countries have beaches, savannahs, or mountains. What sets Kenya apart is not geography—it is narrative. She argued that tourism is emotional, and that guests are drawn not just to places but to the stories that live in those places. Whether it's the smile of a waiter, the laughter of a guest, or the legacy of a family-run lodge, those moments create memories, and memories drive loyalty.

"It's not about the statistics—it's about how you make people feel."

- ***Three Types of Stories That Hospitality Must Tell:*** Agatha outlined a practical storytelling framework every hotel, lodge, and brand can use:
 - o ***The Story of Self:*** The personal stories of staff: a cleaner who became a front-office manager, or a chef who grew up farming and now leads the kitchen. These stories create a connection and humanize brands.

- o *The Story of Us*: The collective story of the hotel team: shared values, culture, and passion. This could be how the team handled a crisis together, built a sustainable garden, or hosted a community event.
- o *The Story of Now*: What is currently happening that guests should care about? A turtle release on the beach? A special farm-to-table harvest night? These are timely, engaging hooks that spark immediate interest and digital buzz.
- **What Makes a Good Story?** A great story is not a timeline—it is a transformation. It must include:
 - o A clear beginning, a challenge or shift, and a resolution.
 - o A blend of logic, emotion, and credibility.
 - o A message that is authentic, surprising, and emotionally resonant.
 - o She reminded participants that while data is important, *"feelings don't care about your facts"*, emotions shape perception, decision-making, and brand loyalty.
- **Opportunities for Storytelling in Hospitality:** Agatha urged hoteliers to unlock stories that are already around them, often hidden in plain sight:
 - o Let housekeepers, gardeners, chefs, and security staff share their journeys. Guests love the people who make their stay special.
 - o Encourage micro-content creation: videos on bed-making artistry, gardening tips, heritage food stories, or cultural crafts.
 - o Showcase transformative guest moments: honeymoons, proposals, family reunions, or a child's first view of the ocean.
 - o Use platforms like TikTok, Reels, and Instagram to humanize the brand—authentic, behind-the-scenes content performs better than polished perfection.

"Your most powerful influencer may not be a celebrity; it could be your pastry chef."

- **Using AI as a Storytelling Assistant:** Agatha gave a live demonstration of how AI tools like ChatGPT can support storytelling strategy. She prompted ChatGPT: *"Act as Sarova Whitesands' brand manager. Give me five storytelling ideas to attract guests."* The tool suggested campaign ideas like:
 - o "Faces of Sarova" – personal staff profiles
 - o "A Day in the Life" – behind-the-scenes videos
 - o "From Kenya, With Love" – guest testimonials and emotional narrativesHer point was clear: AI can help spark storytelling, but the stories must come from real people and real experiences.

Call to Action - Let the Sector Tell Its Story

Agatha ended with a passionate call: “Stop waiting for the Kenya Tourism Board to carry the entire narrative. *Every hotel, every staff member, every guest has a story that can elevate Kenya’s brand.*” She urged the sector to:

- Empower staff to be storytellers, train, encourage, and celebrate their voice.
- Invest in content creation capacity, not just marketing teams, but front-line staff.
- Make storytelling a business strategy, not a side project.
- Be authentic, let go of perfection; focus on emotion and relatability.
- Turn your hotel into a stage for stories that move hearts—and bookings.

“We can’t afford to be invisible. The world won’t come to Kenya just because it’s beautiful. It will come because we made them feel something.”

The role of Kenya Tourism Board in Destination Marketing

5.1. Kenya Tourism Board (KTB)

Presentation by Francis Gichaba

Chairman, Kenya Tourism Board

Session Overview

Francis Gichaba delivered a candid, unscripted address aimed at provoking fresh thinking among stakeholders in the tourism and hospitality industry. His speech focused on Kenya's ambitious journey to achieving 5.5 million international tourist arrivals by 2027, and what the Kenya Tourism Board (KTB) is doing to support this vision. He outlined the sector's post-pandemic recovery, emerging travel trends, diversification of tourism products, and opportunities for public-private partnerships to reimagine Kenya's appeal as a global tourism destination.



Background

Kenya's tourism sector has demonstrated strong resilience post-COVID, surpassing pre-pandemic levels. In 2023, the country recorded 2.4 million tourist arrivals, reflecting a 14.6% increase from the previous year. Domestic tourism also grew by 13%, though this figure may be understated due to the limitations in data capture, especially from digital booking platforms like Airbnb. Gichaba emphasized that the momentum shows Kenya is ready to welcome even more tourists, prompting a need for innovative strategies to meet rising expectations.

What KTB is doing to drive Tourism Growth

To diversify Kenya's tourism offerings and attract new market segments, Kenya Tourism Board (KTB) has rolled out a range of targeted experiences:

- *KTB is driving tourism growth through strategic product diversification:*
 - o Adventure Tourism: Targeting younger, thrill-seeking travelers with immersive, outdoor experiences.

- o Medical Tourism: Attracting regional patients seeking quality, affordable healthcare services.
- o Golf Tourism: Leveraging international events like the Magical Kenya Open and the Sunshine Tour to appeal to sports tourists.
- o Military Sports Tourism: Hosting events such as the World Military Golf Championships to tap into a growing niche segment.
- *A strong focus is being placed on sustainable tourism:*
 - o Promoting the adoption of clean energy and zero-waste kitchens across the hospitality sector.
 - o Supporting community-based tourism models that empower local populations.
 - o Aligning Kenya's tourism practices with global sustainability standards, especially those valued in European markets.
- *Marketing platforms have been scaled up to enhance global visibility:*
 - o *Magical Kenya Tourism Expo (MKTE):*
 - ▣ Scheduled for 1st–3rd October 2025 at Uhuru Gardens, Nairobi.
 - ▣ Targeting 5,000 delegates, 400+ exhibitors, and over 200 international buyers from 40+ countries.
 - ▣ It will also feature the Africa Tourism Investment Forum.
 - o *Magical Kenya Open Golf Tournament:*
 - ▣ Broadcast to over 500 million households worldwide, enhancing Kenya's image as a prime golf and tourism destination.
- Efforts are being made to strengthen both domestic and international markets:

Key Messages and Calls to Action

- *Curate New Experiences:*
 - o "KTB cannot market what doesn't exist."
 - o Tourism players must create immersive, authentic offerings that go beyond wildlife and beach packages.
- *Develop Nightlife as a Product:*
 - o "There is no structured nightlife in Nairobi or Mombasa."
 - o Stakeholders should package evening experiences (music, culture, food) to extend visitor engagement after sundown.
- *Cater to Special Dietary Needs:*
 - o Gichaba cited personal difficulty finding vegan meals in Kenyan hotels.
 - o The industry must offer inclusive, diverse menus for modern, health- or faith-conscious travelers.
- *Showcase Innovation:*
 - o Hotels should feature their unique offerings, like Astro-tourism, for example, of Sopa Lodges' stargazing packages.

- o Hotels must actively market such innovations—KTB can only amplify what's visible.
- *Register for MKTE 2024:*
 - o "Use the platform to showcase your destination, experiences, and partnerships."
 - o Tourism players should participate actively and position their products globally.
- *Embrace Collaboration:*
 - o "This is not the time for turf wars.
 - o KTB is advocating for stronger public-private partnerships and synergy between traditional and digital tourism actors.
- *Embed Sustainability:*
 - o Adopt visible, measurable eco-conscious practices to meet global buyer standards.

PLENARY DISCUSSION

The following were the outcomes of the discussions:

Q: Why are stories about unique tourism experiences not being told or marketed by KTB?

Response: KTB can only promote what it knows about. Stakeholders should share their unique experiences and innovations through platforms like the *Magical Kenya Signature Experiences* program. A new portal is also being developed to make it easier for providers to upload and showcase these offerings.

Q: Why is there limited government presence or support at key tourism events like this Symposium?

Response: Gichaba conveyed apologies from the Cabinet Secretary (CS) of Tourism. However, he acknowledged the frustration and committed to forwarding the concerns to the relevant offices. He reiterated the importance of stronger public-private engagement.

Q: While marketing like the Magical Kenya Golf Tournament is impactful, infrastructure challenges (e.g., poor road access) hinder travel to key destinations.

Response: Gichaba acknowledged the broader efforts across ministries, noting a multi-stakeholder meeting convened recently by the CS to address cross-cutting issues, including infrastructure, health, and customs. He emphasized that changes are underway, particularly around visitor experience.

Key Issues Raised by Participants

- *Lack of Government Presence at Key Tourism Events:*
 - o No sitting President has ever attended the KAHK Symposium in its 21-year history.
 - o In recent years, not even the Tourism Cabinet Secretary or multiple ministers have attended, which participants see as a sign of neglect.

- o This absence was described as a failure by public sector leaders to support or engage with the tourism industry meaningfully.
- *Inadequate Infrastructure:*
 - o Poor road access to tourism destinations (e.g., Mombasa–Malindi road) makes travel difficult and undermines hospitality investment efforts.
 - o This reduces the value of destination marketing since actual access remains a challenge.
- *Slow Government Response to Industry Needs:*
 - o Longstanding issues like infrastructure remain unresolved despite repeated calls from the sector.
 - o Participants feel their concerns are not being acted upon with urgency.
- *Disconnect Between Public and Private Sectors:*
 - o Private sector players feel unsupported by government institutions.
 - o There is a perceived gap in engagement and collaboration, especially in critical areas like marketing, infrastructure, and regulation.
- *Poor Visibility and Promotion of Innovative Local Tourism Offerings:*
 - o Many operators are creating unique products (e.g., astro-tourism, agro-tourism), but these are not known or promoted by KTB.
 - o Frustration that stakeholders are doing “special things,” but there’s no structured way to share or amplify them nationally or internationally.

Conclusion

Kenya has the potential, but it must act deliberately. To reach 5.5 million arrivals, stakeholders must innovate, collaborate, diversify, and let KTB do what it does best: market compelling, visitor-ready experiences to the world.

The Role of Research in Achieving 5 Million

6.1 Tourism Research Institute (TRI)

Presentation by David Gitonga

Acting CEO, Tourism Research Institute

Session Overview

David Gitonga outlined the strategic role of tourism research in Kenya's ambitious drive to attract five (5) million international visitors by 2027. His presentation focused on how data, intelligence, and real-time insights can inform destination marketing, infrastructure planning, product innovation, and policy development. He also highlighted institutional reforms within TRI, gaps in current data ecosystems, and the need for sector-wide collaboration.



Key Highlights of the Presentation

- *TRI's Mandate & Vision:*
 - o TRI is mandated by the Tourism Act (2011) to conduct, coordinate, and disseminate tourism research.
 - o It provides insights for sustainable tourism development, product development, marketing intelligence, and sector planning.
- *Global and African Tourism Growth (Q1 2025):*
 - o The UN Tourism Barometer (May 2025) reported that 300 million international tourists travelled globally in the first quarter of 2025—an increase of 14 million over the same period in 2024, translating to a 5% global growth in arrivals
 - o Africa outperformed the global average, recording a 9% growth in arrivals during the same period. This higher-than-global growth rate indicates a positive trajectory for the continent.
 - o Africa's tourism market share had risen from 4% to 27%, suggesting that the continent is becoming an increasingly attractive destination.
- *Kenya's Tourism Performance (Jan-May 2025):*

- o As of May 2025, Kenya had recorded a 2.6% growth in international tourist arrivals compared to the same period in 2024.
- o Holiday travel was the leading category, followed by business (including MICE), and visits to friends and relatives (VFR).
- o The return of holiday as the dominant purpose of travel signals a resurgence in Kenya's leisure tourism appeal, and is a critical indicator in the country's efforts to reach 5 million arrivals by 2027.
- *Visitor Demographics and Behaviour – Insights from TRI:* A recent Tourism Research Institute (TRI) data reveals the evolving profile and preferences of international visitors to Kenya:
 - o Youthful, Educated Travellers Increasing: TRI's demographic data shows a notable rise in younger, well-educated tourists visiting Kenya. This shift calls for products and messaging tailored to this audience, such as adventure tourism, digital nomad offerings, and affordable yet stylish accommodations.
 - o Repeat Experience and Social Media: Visitors cited “previous experience” as the most common source of information about Kenya, reaffirming the country's strong repeat visitation appeal. Social media and tour agents also ranked highly, signaling the need for consistent storytelling online and improved coordination with intermediaries to influence travel decisions at the point of planning.
 - o Average Stay Duration: The average length of stay was recorded at eight (8) nights, combining both leisure and business (MICE) travellers. Better destination dispersal and experience design could help increase in-country spend per visitor.
 - o Food & Accommodation Rated Highly – But Under-promoted: TRI satisfaction data indicated strong ratings for food quality and accommodation standards, especially in the mid- to high-end segments.

These strengths are not sufficiently highlighted in Kenya's tourism marketing. Need for stakeholders to integrate culinary storytelling and accommodation excellence into the core destination brand, transforming food from a supporting feature into a lead attraction.
- *Projected Impact of Reaching 5 Million Visitors by 2027:* Achieving the national target of five (5) million international tourist arrivals by 2027 is not just a numbers game—it holds transformational potential for Kenya's economy and development agenda. Drawing from TRI's projections, the following would be the key impacts:
 - o Additional 2.6 Million Visitors Needed: To meet the target, Kenya must attract approximately 2.6 million more international visitors between 2024 and 2027. This will require strategic market targeting, product diversification, and real-time data insights to track and adapt to shifting travel trends.
 - o Tourism's GDP Contribution to Surpass 15%: If successful, the five (5) million target could elevate tourism's contribution to Kenya's GDP to over 15%, significantly enhancing the sector's role in national economic planning. Such an outcome would strengthen the case for sustained policy prioritization and resource allocation to the sector.
 - o Creation of three (3) Million Jobs (Direct and Indirect): TRI estimates that

achieving this growth will generate up to three (3) million new jobs, both directly within the tourism value chain (hospitality, travel, attractions) and indirectly through related sectors (agriculture, logistics, creative industries). This positions tourism as a high-impact driver of inclusive job creation, particularly for youth and rural communities.

- o Strong Case for Infrastructure Investment: Hitting the five (5) million mark would offer strategic justification for public investment in tourism-enabling infrastructure development in areas such as transport corridors, air connectivity, digital networks, and utilities.

He referenced the Tourism Blueprint 2030, which outlined critical infrastructure priorities that, if implemented, would ease access, improve visitor experiences, and stimulate regional economies.

- *Identified Gaps in Tourism Research:*
 - o Lack of real-time and predictive data on visitor purpose, spending, mobility, and satisfaction.
 - o Weak product intelligence and limited understanding of niche market dynamics.
 - o Disjointed data ecosystems, poor integration between key players, including private sector data holders.
 - o Insufficient use of AI, GIS, and machine learning in forecasting and behavior analysis.
- *Research & Data-Driven Solutions Proposed:*
 - o Establish a National Tourism Data Observatory, accredited by UN Tourism.
 - o Implement a National Tourism Research Framework (currently under review).
 - o Advanced AI-powered analytics, mobile geolocation tracking, and psychographic profiling of travelers.
 - o Institutionalize quarterly performance tracking and conduct exit surveys to gauge visitor experiences.
 - o Improve economic impact modeling to inform ROI and infrastructure investment.

Call to Action / Recommendations:

- Encourage data sharing across the hospitality and travel ecosystem through secure APIs and confidentiality agreements.
- The government should invest in integrated tourism research systems and smart dashboards.
- Strengthen public-private-academic collaboration, including joint research labs with universities.
- Align research to Vision 2030 infrastructure goals (as per the Tourism Blueprint).
- Develop sustainability accounting systems in line with UN frameworks.

PLENARY DISCUSSION

Below are the key outcomes of the discussions:

Q: Why are we not seeing improved international air access directly into Mombasa? Why are visitors still being routed through Nairobi despite the evident demand?

Response: The issue of air connectivity is currently under review by a multi-ministerial task force led by the CS for Transport and other Cabinet Secretaries. Findings and decisions are expected soon.

Q: Are we following up with tourists' post-visit via email, e.g., after applying for an e-visa? This would help gather valuable feedback to improve experiences.

Response: TRI has made progress, but the visitor journey is still not fully captured, especially the experience after arrival.

Q: There's a recurring concern about the disconnect between official tourism data and the reality experienced by stakeholders on the ground. How accurate is the data we rely on, and does it reflect true impact?

Response: TRI is aware that current data often captures only point-of-entry figures, without telling the full story of how tourists move, spend, and impact various destinations across the country. TRI is actively working to improve destination-level tracking through geolocation and mobility data to better quantify economic impact and inform decision-making.

Key Issues Raised by Participants

- *Poor International Air Access to Mombasa and Other Regional Destinations:*
 - Stakeholders expressed deep frustration that Kenya continues to rely on a hub-and-spoke model, requiring most international tourists to land in Nairobi before connecting to Mombasa or other coastal destinations. One participant specifically highlighted a personal example: A group of tourists flying to Mombasa were advised to fly into Nairobi, then connect to Mombasa. The connecting route was so inconvenient that they eventually cancelled the entire trip.

The sentiment was clear: "We don't care who is flying—we just need more direct flights to Mombasa and other key tourist hubs."
- *Missed opportunity to collect post-visit feedback via E-Visa system:*
 - Although tourists must submit their email addresses when applying for e-visas, Kenya does not follow up to collect post-trip feedback.
 - Participants felt this was a lost opportunity to gather valuable insights on visitor experiences and satisfaction.
- *Disconnect between official statistics and ground reality:*
 - Some operators questioned the validity of the official arrival data, suggesting it does not always align with what is observed on the ground.
 - There was concern that the lack of integrated, real-time data on how tourists move and spend within Kenya prevents stakeholders from telling a complete and credible story to the government and investors.

- *Underutilization of data held by the private sector:*
 - Hotels and tour operators, who interact with tourists daily, sit on large volumes of valuable data, but there is no structured mechanism or trust framework to facilitate secure and useful data sharing with TRI.
 - As a result, the national research remains fragmented and incomplete.
- *Lack of real-time tracking of the visitor journey:*
 - Current data systems focus on point-of-entry statistics (e.g., arrival numbers), with limited insight into the tourist's journey across destinations, expenditure, or satisfaction.
 - This makes it difficult to quantify tourism's full economic impact, especially at the county or regional level.

Stakeholder Feedback on the Five (5) Million Tourist Goal

As part of the plenary discussion, participants were invited to candidly assess the realism and feasibility of Kenya reaching five (5) million international tourist arrivals by 2027. This came after a presentation highlighting a 2.6% annual growth in arrivals and reaffirming the government's target to achieve the milestone within three years. The moderator posed a pointed challenge: *"What comes to mind when you hear about the 5 million goal?"* — sparking an energetic exchange among hoteliers, tour operators, aviation stakeholders, regional voices, and industry leaders.

The Table below provides a summary of the key issues raised and recommendations given:

Key Issues Raised by Stakeholders

No.	Issue Category	% of Mentions by Participants	Representative Quote
1.	Air Access & Open Skies Policy	70%	"It's not possible without open skies." — Traveller's Beach
2.	Unrealistic Growth Projections	40%	"At 2.6% growth, we'll hit 3.2M, not 5M." — Hotelier
3.	Lack of Interagency Coordination	35%	"We need serious intervention from the Ministry of Transport." — Aviation Rep
4.	Disconnect: Data vs Ground Reality	25%	"How do we count tourists if 50% stay in unclassified facilities?" — KATO
5.	Exclusion of Western/Northern Circuits	20%	"From Kakamega, we don't see ourselves in the strategy." General Manager, Golf Hotel, Kakamega
6.	Private Sector Not Engaged in Policy	20%	"Policies come to us for validation after they're already written."
7.	Weak Incentive Framework	15%	"We're not providing incentives to travel."
8.	Lack of Timelines & Accountability	10%	"Give us October as the target to show results." — Coast Hotelier

Overall Recommendations by Stakeholders towards the Five (5) million Tourist Goal:

No.	Strategic Area	Immediate Actions
1.	Air Accessibility	<ul style="list-style-type: none"> ▪ Approve pending licenses for interested international carriers (e.g., Turkish Airlines, Netherlands charters, Brussels Airlines). ▪ Prioritize Mombasa access.
2.	Open Skies & Bilateral Agreements	<ul style="list-style-type: none"> ▪ Fast-track Open Skies discussions and review restrictive bilateral agreements that block competitors.
3.	Growth Modeling	<ul style="list-style-type: none"> ▪ Adopt realistic based projections instead of overly ambitious figures without structural reform.
4.	Stakeholder Engagement	<ul style="list-style-type: none"> ▪ Convene an urgent, inclusive meeting led by the CS with industry players.
5.	Regional Integration	<ul style="list-style-type: none"> ▪ Incorporate the Western/Northern tourism circuits into the national strategy to ensure inclusive growth.
6.	Policy Co-creation	<ul style="list-style-type: none"> ▪ Involve the private sector from the outset in tourism policy formulation and strategy validation.
7.	Incentive Alignment	<ul style="list-style-type: none"> ▪ Introduce fiscal and promotional incentives to boost destination appeal (e.g., subsidies, packages, loyalty programs).
8.	Timelines & Accountability	<ul style="list-style-type: none"> ▪ Set clear milestones—e.g., Open Skies implementation by October MKTE 2025—and report progress.
9.	Data Quality & Access	<ul style="list-style-type: none"> ▪ Enhance visitor journey tracking, validate facility usage data, and share insights with industry actors.

Plenary Sessions



Plenary Sessions



Leveraging Digital Payments as a Driver of Tourism

9.1 American Express and Equity Group

By Jonathan Curtis

Vice President, Business Development Sub-Saharan Africa, American Express, and

Eva Ngigi

Group Payments Director, Equity Group

Presentation Overview

This session spotlighted the strategic role of payments infrastructure in advancing Kenya's tourism sector, with a joint presentation by Jonathan Curtis (American Express, Vice President, Business Development Sub-Saharan Africa) and Eva Ngigi, (Group Payments Director, Equity Bank). The speakers outlined how American Express and Equity Bank work together to provide an opportunity for local merchants to benefit from being connected to American Express' higher-spending Cardmember base, and how this can support the tourist ambition in Kenya.

Key Highlights

- About American Express
 - o Celebrating 175 years in 2025 (founded 1850), with deep historical links to travel (e.g., travelers' cheques, travel agency operations).
 - o Annual spend of American Express Card Members is 2.9

¹ Nilson Report #1,257, February 2024. Spend per card derived from U.S. year-end purchase volume divided by year-end cards in force (CIF), not from individual consumer-level data. CIF represents the number of cards issued and outstanding with cardholders. Average Non-American Express spend per card includes Visa, MasterCard and Discover credit and charge card volume and CIF and excludes debit and prepaid volume and CIF.



times more than non-Card Members in the U.S¹.

- o Offers Travel benefits for eligible Card Members including Fine Hotels & Resorts, Concierge Services, ...
- Local Partnership with Equity Bank
 - o Equity is American Express' licensee in Kenya (since 2013).
 - o Equity issues American Express Cards in Kenya (Green and Gold Cards) and acquires merchants that join the American Express network.
 - o Co-branded campaigns via themed Point of Sale materials promoting acceptance of American Express in Kenya are visible across hotels, malls, and retail hubs.

Key Insights from the Equity Group

- The Kenyan tourism is an important growth pillar for Equity.
- Equity aims to grow its total customer base to 100 million customers and 5 million borrowing businesses by 2030.
- Highlighted Amex's ability to attract high-spending travelers (both corporate and consumer).

Closing Remarks

By Mike Macharia, CEO, KAHC

Mike Macharia expressed his appreciation to all participants and speakers for their valuable contributions that made the 2025 Symposium a success. He noted that the one-and-a-half-day event had been productive, with rich discussions and strong engagement across all sessions.

He thanked attendees for their energy, insight, and commitment to strengthening the hospitality and tourism sector, adding that the collaborative spirit evident throughout the Symposium was a testament to the sector's resilience and shared vision. Special thanks were extended to the master of ceremonies, Catherine Murage, for her excellent moderation throughout the event.

In closing, Mr. Macharia welcomed everyone to the evening's gala dinner and officially invited all delegates to the 2025 KAHC Golf Tournament, scheduled to tee off the next morning. He encouraged both golfers and non-golfers to attend the prize-giving and dinner, highlighting it as an opportunity to engage with a broader network of professionals from across the coastal and national hospitality landscape.



Partners



Partners



Engagement with the Media



Cocktail



Cocktail



Gala Dinner



Gala Dinner



Golf Tournament



Golf Tournament



Annex 1: List of Participants

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Annex 2: Symposium Agenda

DAY 1: 26TH JUNE 2025

TIME	ACTIVITY	ACTOR
08:00 - 09:00 AM	Registration	KAHC Secretariat
09:00 - 09:15 AM	Chief Executive Officer Mike Macharia invites KAHC National Chairman to make Introductory Remarks	Chris Musau Recognition of Partners & Sponsors; Symposium Highlights; Invitation of PS
09:15 - 09:30 AM	Welcome to Mombasa and The Role of County Governments in Achieving Tourism Target	Hon. Francis Thoya Deputy Governor, County Government of Mombasa
09:30 - 09:40 AM	Introduction of the Guest of Honour	Mr. John Ololtuaa Principal Secretary, State Department of Tourism
09:40 - 10:00 AM	Official Opening and Keynote Address	Hon. Rebecca Miano Cabinet Secretary, Ministry of Tourism & Wildlife
10:00 - 10:15 AM	Interactive Session	
10:15 - 11:00 AM	GROUP PHOTO TEA BREAK/TOUR OF THE EXHIBITION STANDS	
11:00 - 11:30 AM	Session 1: Kenya's Potential as a MICE Destination	Amanda Koetze-Nhlapo - Key Guest Speaker MICE Business Expert (South Africa)
11:30 - 12:00 PM	Presentation	Charles Okeyo Tourism Fund
12:00 - 12:30 PM	The Role of Pension Schemes in the Development of Tourism	David Koross Managing Director, NSSF
12:30 - 1:00 PM	Q&A Session	
1.00 - 2:00 PM	LUNCH	
2:00 - 2:30 PM	Session 2: Building Human Capacity as a Driver of Tourism Development	Mr. Samuel Irungu Principal, Boma International Hospitality College
2.30 - 2:45 PM	Presentation	Elsa Lunani DSTV
2:45 - 3:15 PM	Session 3: Telling our Tourism Stories for Increased Visitor Arrivals	Agatha Juma Director, Engage Talk
3:30 - 4:00 PM	Q&A Session	
4:00 - 4:15 PM	Wrap-Up - DAY One	
4:15 - 5:00 PM	TEA BREAK	
6:30 PM	Cocktail Dress Code: Smart Casual	

DAY 2: FRIDAY 27TH JUNE 2025

TIME	ACTIVITY	ACTOR
09:00 – 09:15 AM	Welcome Address	Mike Macharia Chief Executive Officer, KAHC
09:15 – 09:45 AM	Session 4: The Role of KTB in Destination Marketing	Francis Gichaba, Chairman, Kenya Tourism Board
09:45 – 10:15 AM	Session 5: The Role of Research in achieving 5 Million	David Gitonga Acting CEO, Tourism Research Institute
10:15 – 10:45 AM	Session 6: Leveraging on Digital Payments as a Driver of Tourism	Jonathan Charles Curtis Vice President, Business Development, American Express
10:45 – 11:15 AM	Q&A Session	
11:15 – 11:45 AM	TEA BREAK/TOUR OF THE EXHIBITION STANDS	
12:00 PM	KAHC AGM	KAHC MEMBERS
1:00 – 2:00PM	LUNCH	
02:00 PM	AFTERNOON AT LEISURE	
07:00 PM	GALA DINNER – DRESS CODE: "TRADITIONAL ATTIRE OR WHITE"	

DAY 3: SATURDAY 28TH JUNE 2025

08:30 AM	KAHC Charity Golf Tournament	Nyali Golf and Country Club
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Making Kenya's hospitality globally competitive
KENYA ASSOCIATION OF HOTEL KEEPERS AND CATERERS