

## Market Profiling and Positioning of Park Brands in Kenya (Case of Premium and Under-Utilized Parks)

SHEM WAMBUGU MAINGI<sup>1\*</sup>, ALICE N. ONDIGI<sup>2</sup> and JOSEPH KIBUYE WADAWI<sup>3</sup>

<sup>1</sup>*Kenyatta University, NBI Nairobi, Nairobi, Kenya*

<sup>2</sup>*Kenyatta University, School of Hospitality and Tourism Management, Nairobi, Kenya*

<sup>3</sup>*Strathmore University, Centre for Tourism and Hospitality Management, Nairobi, Kenya*

### ABSTRACT

The study sought to investigate the market profiling and positioning of park branding in Kenya. Tourism arrivals in Kenya are currently spatially concentrated in only six parks, which receive 81% of the total number of visitors to the country's 26 wildlife sanctuaries. A descriptive survey design was adopted in the study. Two-stage cluster sampling technique was adopted. The focus of the study was on four protected areas within the Central Tourism region, Kenya. Cluster analysis indicated that the park brands attracted differentiated cluster segments. The results implied that tourism marketing and promotion ought to design, package and promote the brand differently to meet targeted needs of these segments. Copyright © 2015 John Wiley & Sons, Ltd.

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KEY WORDS park tourism; branding; tourism markets; market positioning; wildlife tourism

### INTRODUCTION

#### Background of study

Studies in destination branding have indicated that branding has a role to play in integrating efforts to promote tourism (Foley & Fahy, 2003). Balakrishnan (2008) makes a case for the fact that destination brands are key to tourism marketing strategy as they control an estimated \$1480bn in tourism spending globally and \$2bn international tourist spending per day, to the extent that destinations are highly dependent on popular brands. Studies by Kotler (2002); Franzen and Bouwan (2001) and Wood (2000) also claim that a differentiated brand signature is a means of conveying exclusivity, lifestyle and fashionability to a destination. Such that differentiated brands play a role in attracting segmented markets. Kapferer (1997) notes that brands do not just serve as identifiers to function as a recognizable symbol so as to facilitate choice and gain time, but brands offer the ability to gain an exclusive, positive and prominent meaning in the minds of the consumers.

The preponderance of such studies, recently laying the claim that destinations can be branded in the same genre as tangible products, have yet to establish their influence on market positioning and choice behaviour of visitors. Spatial studies on place brands such as Glasgow's 'Smiles better' and New York's 'I love New York' have shown a growing recognition by marketers that branding can make a significant contribution to regions (Bradley *et al.*, 2002; Hankinson, 2004). Place brands can make imitation by competitors difficult, as well as facilitate the achievement of desired competitive position and successful product

development strategy. The creation of a successful marketing strategy therefore depends much so on well-positioned brands that are in harmony with the consumers' needs. Indeed, customer-centric brands have led to a rise of leisure rich and segment-specific brands where companies like Nike focus more on youthful consumers and Brand Disney focuses on parents with small children. However, over-communication, evolution of lifestyle markets, market fragmentation and product saturation in the tourism market continues to pose significant challenges for tourism marketers as they seek to make their destination brands relevant to market-specific segments. This is a clear indication that market dynamics have significantly influenced tourism growth globally. It is critical to assess the market positioning of branded destinations in this context in influencing such emerging markets.

While these explanations maybe correct, there is need to understand the deeper insights on the market positioning of park brands in influencing choice behaviour of visitors. There is need for studies to consider product-related associations, personality, perception and symbolic associations so as to ensure that brand identity has texture and depth (Aaker, 1996; Min Han, 2000). Varied research in Brand marketing indicates a need to profile visitors based on brand preferences (Graburn, 1989; Kates & Goh, 2003; Ivana, 2009). These are measures intended on building customer loyalty, brand-equity, as well as willingness on behalf of the consumers to search for the park brand. It was with these in mind that the study was designed to assess the market profiling and positioning of park branding in Kenya. Specifically, the study sought

1. to profile tourists based on their personal brand preferences and
2. to examine the antecedent factors influencing the wildlife tourists market positioning and choice.

\*Correspondence to: Shem Wambugu Maingi, NBI Nairobi, Kenyatta University, Nairobi, Kenya.  
E-mail: shem.maingi@gmail.com

**Tourism status in Kenya**

Tourism has grown to be a significant contributor to Kenya’s economy. The sector has recorded a dramatic rise in earnings by 32.8% from KSh 73.7bn in 2010 to KSh 97.9bn in 2011 (KNBS, 2012). Tourism has been instrumental in the realization of national economic goals set out in the Economic Recovery Strategy for Wealth and Employment Creation (ERS 2003–2007), Vision 2030 as well as the Medium Term Plan (2008–2012). With the foregoing, the sector is expected to spearhead future national economic development agenda for the country. It is expected to contribute significantly towards the overall goal of increasing the GDP growth from 2.6% in 2009 to 10% per annum by the year 2030 (GoK, 2012). Wildlife and nature-based safari tourism lies at the core of Kenya’s tourism offerings. The gross contribution of tourism to GDP is expected to rise, as well as the level of capital investments and expenditures on tourism concurrently (see Figure 1 below).

Kenya has developed strategic potential for long-term growth in this sector, despite recent stagnation linked to security related shocks (see Figure 1 above). Its potential is primarily due to its ideal position, relative stability, natural beauty, distinctive cultures and coastal location. In realization of such potential, the Government of Kenya’s Tourism Marketing and Recovery Strategy and Medium Term Plan (2008–2012), in 2008, identified diverse policy initiatives and key flagship projects to develop Kenya’s tourism (GoK, 2009). Tourism flagship projects included the development of three resort cities (in Isiolo, Kilifi and Diani/Ukunda), premier and underutilized park branding initiatives, as well as niche tourism product development. In all of these initiatives, there was the underlying need to enrich, consolidate and build on existing efforts of making Kenya a competitive tourism destination globally.

Up to March 2013, eighteen parks and reserves have been branded in Kenya, and expectations are that such market-based initiatives would improve the image of these conservation areas as premier, world-class parks and tourist

destinations. Nonetheless, the 2013 Travel and Tourism Competitiveness Report indicates a decline in ranking of Kenya’s tourism sector, as far as effectiveness of national marketing and branding efforts in attracting tourists. Indeed, the marketer may consider a brand of utmost importance, but the consumer continues to play a significant role in determining when and whether the brand really matters.

**Problem statement**

Despite park branding initiatives in Kenya, tourism arrivals in Kenya are currently spatially concentrated in only six parks (Nairobi National Park, Lake Nakuru National Park, Maasai Mara National Reserve, Tsavo East National Park, Amboseli National Park and Tsavo West National Park), which receive 81% of the total number of visitors to the country’s 26 wildlife sanctuaries (GoK, 2008; GoK, 2010; GoK, 2013). Further, the sector remains relatively underdeveloped, compared with other tourist destinations, in terms of the number of tourists, yield and diversity of experience. According to the National Tourism Strategy (2013–2018), only 1 500 000 tourists visit Kenya a year, compared with some 8 300 000 per year in South Africa (GoK, 2013). In a similar tone, the National Tourism Medium Term Plan (2008–2012) noted that the image and dismal performance of the sector had been attributed to the escalation in global terrorism, infrastructural deficiencies, static and uninnovative products, meagre resources allocated for promotion and marketing, declining standards of tourism products, as well as increased regional competition (GoK, 2008). Leisure tourists currently represent the largest segment of the inbound travelling population to Kenya, accounting for just over 62% of the global tourist market (UNWTO, 2010) and 83.7% of the Kenyan tourist market in 2005 (GoK, 2013). Kenya has not yet addressed the strategic potential of the domestic market vis-à-vis the international market and other potential niche markets (GoK, 2009). A more comprehensive understanding of

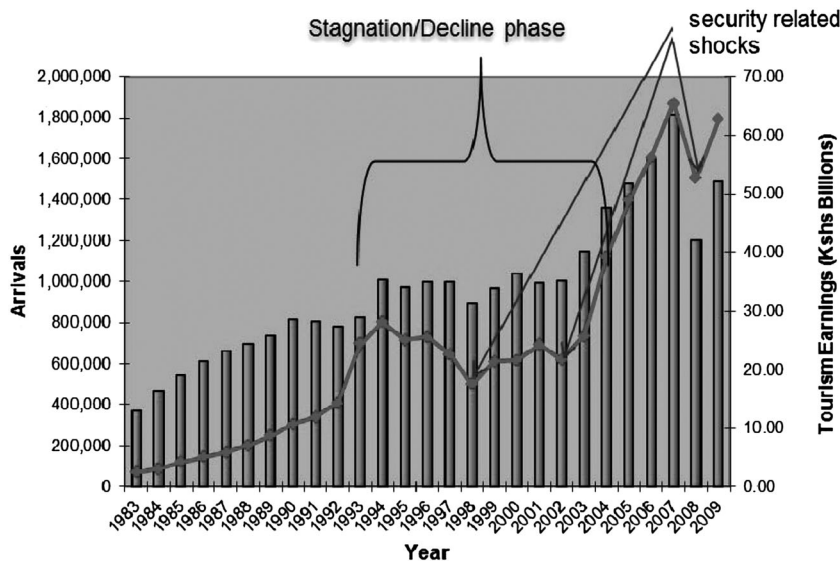


Figure 1. Tourism earnings and arrivals in Kenya (1983–2009).

leisure tourists' behaviour allows tourism organizations to better understand their target markets, therefore formulating effective destination marketing strategies.

## LITERATURE REVIEW

### The concept of market-positioning in tourism

Market positioning has evolved from conceptualization of a battle for your minds by Al Ries and Jack Trout (market positioning pioneers [1972–1978]) to the place where existing products are put in the market-place by consumers, therefore positioning against competition (Karadeniz, 2009). Market positioning is a key strategy for achieving differential advantage over competition. Positioning reflects the 'place' a brand occupies in a market. A successful brand position has characteristics that are both differentiating and important to consumers. Brand positioning has become more and more important as destinations try and reach out to visitors. Kotler (2002) also claimed that this differentiated brand message carried meaning, association and landed coloration, character and quality to a product or service. In a sense, Pine and Gilmore (2000) argue that economic development is gradually shifting towards the experience economy, where meaningful brand experiences are making a difference to consumers. The creation of economic value and brand positioning for destinations and companies is gradually shifting from commodities to experiences, which are more relevant to consumers. Therefore, the brand creates a significant aspect of customer imagery that was fundamental in the customer purchasing and market positioning process.

### Destination branding research

Varied empirical literature on branding research maintains that brand experiences are diverse (Graburn, 1989; Kates & Goh, 2003; Ivana, 2009). Therefore, brand meaning is not pre-determined in an information booklet; rather, it is construed in the customers' minds. Ivana (2009) supports this proposition by noting that people experience brands in different settings, situations and psychological states and therefore their understanding of brands is different. Variety of tourist expectations are primarily based on seeking the essence of the tourist experience, as a quest for authenticity (MacCannell, 1976), a personal transition from home to elsewhere (Graburn, 1989), a form of neo-colonialism (Nash, 1977) or a particular type of 'gaze' (Urry, 1990).

With the rapid globalization of the tourism market, consumers from different cultural scopes have different perceptions, needs, tastes, attitudes, beliefs and value systems. Kapferer (1997) affirms this point by noting that destination brands do not just serve as identifiers to function as a recognizable symbol so as to facilitate choice and gain time, but brands offers the ability to gain an exclusive, positive and prominent meaning in the minds of the consumers. While these explanations maybe correct, there is need to understand the deeper insights on the meaning of brands to consumers. Aaker (1996) claims the need to consider these product-

related associations, personality and symbolic associations so as to ensure that brand identity has texture and depth.

Holt's (2004) comparison of branding research provides an illuminative view to the differentiated scopes of brands. He specifically categorized them into four main branding types. The first one, 'mind-share branding', comes from the need to occupy a significant share in the minds of customers. The second type of branding is 'emotional branding', which builds upon the mind share and emphasizes on how the brand essence should be communicated through emotional appeals. The third type is 'viral branding', which focuses on enhancing public influence through viral marketing. The fourth type of branding is 'cultural branding', where communication lies central to the brand and the customer seeks to listen to the story that the brand has to offer. The product in this case is seen as a conduit through which customers experience cultural myths of the brand.

It is therefore important to note from branding research that a brand embodies a whole set of meanings to a service provider/customer who can manifest in different functional, symbolic and experiential or luxury forms. These meanings may arise from constant interactions with the marketers, family, friends, retailers, the media, etc. However, Keller (2003) notes that, to a particular extent, there is some element of brand self-meaning arising not through connection with the social paradigm but through a direct connection to individualized consumer goals, needs and motives. The individualized needs for self-expansion, social adjustment, value expression, self-construction and emotional regulation serve as self-meanings. It is therefore imperative that these individualized and social and institutional meanings are contextualized within the context of brand choice behaviour. The study sought to assess the significance of such core brand meanings to consumer choices.

## METHODOLOGY

### Research and sampling design

A descriptive survey design was adopted as it allowed the researchers to quantify, relate and justify attitudes of greater number of respondents (Kothari 1999). A two-stage cluster sampling technique was adopted in coming up with a representative sample. This constituted of branded parks as the primary sampling units (clusters) and the second level constituted of the visitor/tourist visiting branded parks. Lake Nakuru National Park, Nairobi National Park, Hell's Gate National Park and the Aberdare National Park formed four sub-clusters. Although the four parks have commonalities in the sense, they are less congested and focus more exclusively on wildlife tourism; they are all remains of the white highlands and are in close connectivity (see Figure 2 below) and have close proximity to the private ranches and Nairobi (JICA, 1997).

The Kenya Wildlife Service (KWS) branded terrestrial parks of the Republic of Kenya as by 18 April 2011 comprised the Universe from which cluster samples were constituted for analysis (see sampling frame in Table 1 below).

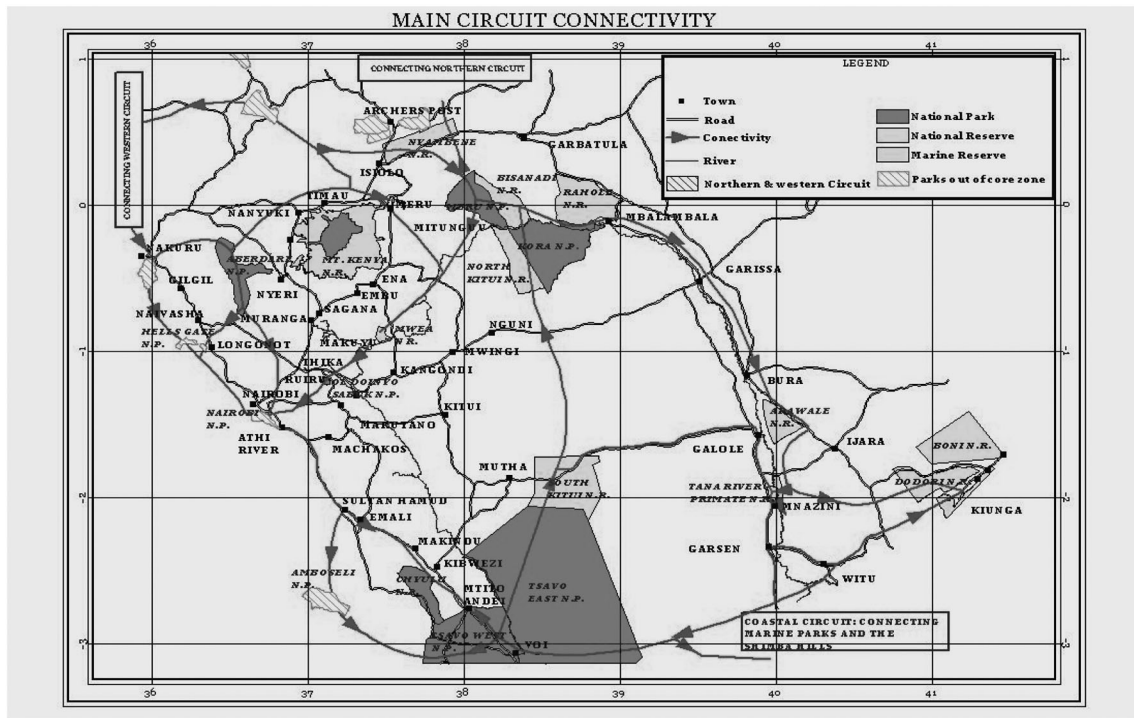


Figure 2. The study locations.

Table 1. Cluster sampling frame

Cluster	Type	Sub-cluster	Branded national park
Premium parks	Premium parks	Premium parks	Amboselli (branded on 23 September 2005) Lake Nakuru (branded on 10 August 2005)
Under-utilized parks	Rural	Wilderness parks	Aberdare National Park (branded on 3 March 2006) Tsavo East (branded on 9 December 2005) Tsavo West (branded on 8 November 2005) Meru (branded on 19 July 2007)
	Urban Semi-urban	Urban safari Scenic and special interest parks	Nairobi National Park (branded on 16 December 2006) Hell's Gate (branded on 25 September 2009) Ol Donyo Sabuk (branded on 21 June 2007) Mt. Longonot (branded on 25 September 2009) Shimba hills (branded on 18 April 2011) Ndere Island (branded on March 3, 2010)

Note  
The population of Kenya Wildlife Service terrestrial branded parks and representative clusters branded as at 18 April 2011 were the subject of the study.  
Source: Researchers

**Sample size**

To determine the minimum sample size selected in each branded park, the study employed the confidence interval approach widely used in existing literature as indicated in the formulas (1) and 2 below.

$$n = \frac{Z^2(PQ)}{E^2} = \frac{1.96^2(0.5*0.5)}{0.05^2} = 385. \quad (2)$$

The approach adopted in determination of the sample size involved a specification of the precision of estimation desired and then the determination of the sample size necessary to insure it (Kothari, 1999 & Madansky, 2011). The sampling precision levels of estimated sampling proportions were

identified based on the estimated proportion of the population visitation.

**Data collection procedures**

The data were collected from August 2013 to December 2013 by use of a post-visit questionnaire targeting the travellers. The respondents were obtained from a random issuance of the questionnaires at the main park exit points and the tourism facilities within the parks. The data had been gathered from self and enumerator-administered questionnaires. The pre-tests then commenced before the main study would be conducted. Target numbers of respondents were 385 respondent questionnaires. Total questionnaires collected were completed by 358 respondents in the focal areas under study. This represented an overall response rate of 93%, which were deemed adequate for the analysis. The data collected within

this phase were subjected to a screening process where outliers and inconsistencies were determined. The diagnostic phase enabled the researcher to identify missing data and the effects of the missing data on the reliability of the results.

## STUDY FINDINGS

### Pre-testing

To measure the reliability of the instrument (Questionnaire), the instrument was subjected to a reliability test to ensure that the measurement instrument yielded consistent results. Specifically, the inter-rater reliability method was used to assess the correlation of scores between the respondents pre-tested. The intraclass correlation coefficient for inter-rater reliability was specifically chosen to test the hypothesis whether the item ratings had equal ratio of group variances to error variances in the population.

The results in Table 2 above indicate that the single measures intra-class correlation ( $r=0.783$ ) and the average measures intraclass correlation were highly significant ( $r=0.896$ ) within a 95% confidence interval indicating that the measures of observation taken have a very high agreement between inter-raters.

### Preliminary findings

#### Age

In terms of age, the findings were indicative of the fact that Hell's Gate attracted a relatively younger visitor while the Aberdare National Park attracted a relatively older visitor type (see Table 3 below). This may have been attributed to the fact that Hell's Gate has, over the years, been a preserve for cycling, walking and rock climbing on the lime-streaked cliffs and impressive gorge, as well as a growing number of young adventure and sport enthusiasts (KWS, 2013). Such a physically demanding sport is a preserve for the youthful.

Results pinpointed that the European baby-boomer generation ages were significantly active and attracted to Aberdare National Park. Eagles (2010) and Middleton *et al.* (2009) noted that the rising number of active, ageing and affluent people within the ages of thirty-five years and above is a vital trend that will influence global travel and tourism markets in the twenty-first century. Such age-centric actionable segments mean that product development within parks has to be addressed in catering for the needs of these segments. For instance, the Biosphere Reserve SE Rugen in Germany

diversified their products to meet the needs of three youth segments i.e. nature lovers weekends, nature camp weekend getaways for young couples and the sportive weekend getaways. These products had an array of attributes that would range from leisure, hospitality and tourism activities, attractions and events.

#### Gender

Gender profiles of the visitors indicated that Aberdare National Park attracted, on average, more male visitors ( $\bar{x}=1.43$ ;  $\sigma=0.498$ ; coefficient of variation (cv)=0.348) than the rest of the parks. (see Table 4 standard deviation figures).

Aberdare National Park was singled out as a more attracted to male (57.3%) than female (42.7%) visitors. The question that would most logically be asked with this finding is why that is the case? To answer this question, there is need to interrogate the gender role orientation of visitors. Hawkins and Mothersbaugh (2010) attest to the basic hypothesis that there may be an association between gender roles and consumer perceptions. Variations in value systems may seem to have a significant influence on the consumption patterns and preferences of visitors than may be the norm. Indeed, Chavez (2013) gives an account of such changes in demographic factors on leisure-based activities in America.

#### Country of origin

The findings (as shown in Figure 3 below) indicated that for the individual country types, the five major visitor segments to each of the parks included the following (as shown in Figure 4 below).

The findings, as shown in Figure 4, further showed a dominance of the domestic, traditional markets and niche markets while it confirmed the poor performance of the emerging markets i.e. the BRICS (Brazil, Russia, India, China and South Africa), as well as the regional markets in all the parks visited. These findings were in contrast to the projected findings by the European Travel Monitor that Europe's two largest source markets, Germany and UK, would record intense decline (Boniface & Cooper, 2009; Conrady & Buck, 2010).

#### Annual personal income

Annual personal income profiles of visitors showed distinct variations between parks, with visitors to Aberdare National Park having the highest mean earners ( $\bar{x}=3.46$ ;  $\sigma=1.935$ ;  $cv=0.559$ ) and Lake Nakuru National Park

Table 2. Intraclass correlation coefficient for inter-rater reliability analysis

	Intraclass correlation <sup>b</sup>	95% confidence interval		F-test with True value 0			F-test with True value 0 <sup>b</sup> Sig
		Lower bound	Upper bound	Value	df1	df2	
Single measures	0.783 <sup>a</sup>	0.704	0.938	31.321	7	7	0.000 <sup>a</sup>
Average measures	0.896 <sup>c</sup>	0.879	0.973	31.321	7	7	0.000 <sup>c</sup>

Source: Researchers

Two-way mixed effects model where people effects are random and measures effects are fixed.

<sup>a</sup>The estimator is the same, whether the interaction effect is present or not.

<sup>b</sup>Type A intraclass correlation coefficients using an absolute agreement definition.

<sup>c</sup>This estimate is computed assuming the interaction effect is absent, because it is not estimable otherwise.

Table 3. Descriptive data on age profile of the respondents in selected parks

	N	Mean	Mean age cohort	Std. deviation (± mean)	Std. error	Coefficient of variation (cv)	95% confidence interval for mean	
							Lower bound	Upper bound
Age of tourist								
Nairobi National Park	91	2.25	25–34	1.131	0.119	0.503	2.02	2.49
Hell's Gate National Park	88	1.98	25–34	0.742	0.079	0.375	1.82	2.13
Nakuru National Park	103	2.28	25–34	1.216	0.120	0.533	2.04	2.52
Aberdare National Park	76	2.83	35–44	1.290	0.148	0.456	2.53	3.12
Total	358	2.32		1.147	0.061	0.494	2.20	2.43

Source: Researchers

Table 4. Descriptive statistics of visitor gender profiles of visitors to national parks

	N	Mean	Mean sex cohort	SD	SE	Coefficient of variation (cv)	95% confidence interval for mean	
							Lower bound	Upper bound
Sex								
Nairobi National Park	91	1.56	Female	0.499	0.052	0.320	1.46	1.66
Hell's Gate National Park	87	1.46	Female	0.501	0.054	0.343	1.35	1.57
Lake Nakuru National Park	103	1.55	Female	0.500	0.049	0.322	1.46	1.65
Aberdare National Park	75	1.43	Male	0.498	0.057	0.348	1.31	1.54
Total	356	1.51		0.501	0.027	0.332	1.45	1.56

Source: Researchers

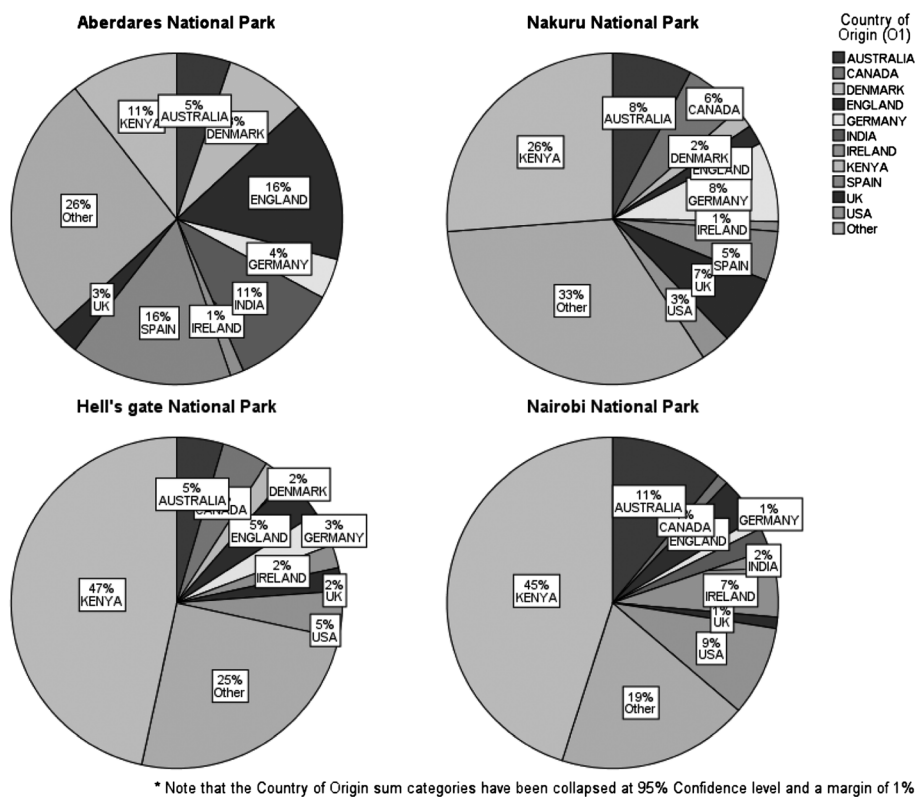


Figure 3. Distribution based on country of origin.

attracting the lowest average of earners ( $\bar{x} = 1.55$ ;  $\sigma = 0.500$ ;  $cv = 0.322$ ) (Table 5). Further, the highest mean earners varied more widely for survey respondents in

Aberdare National Park ( $\sigma = 1.935$ ) compared with the average income scores to Lake Nakuru National Park ( $\sigma = 0.500$ ).

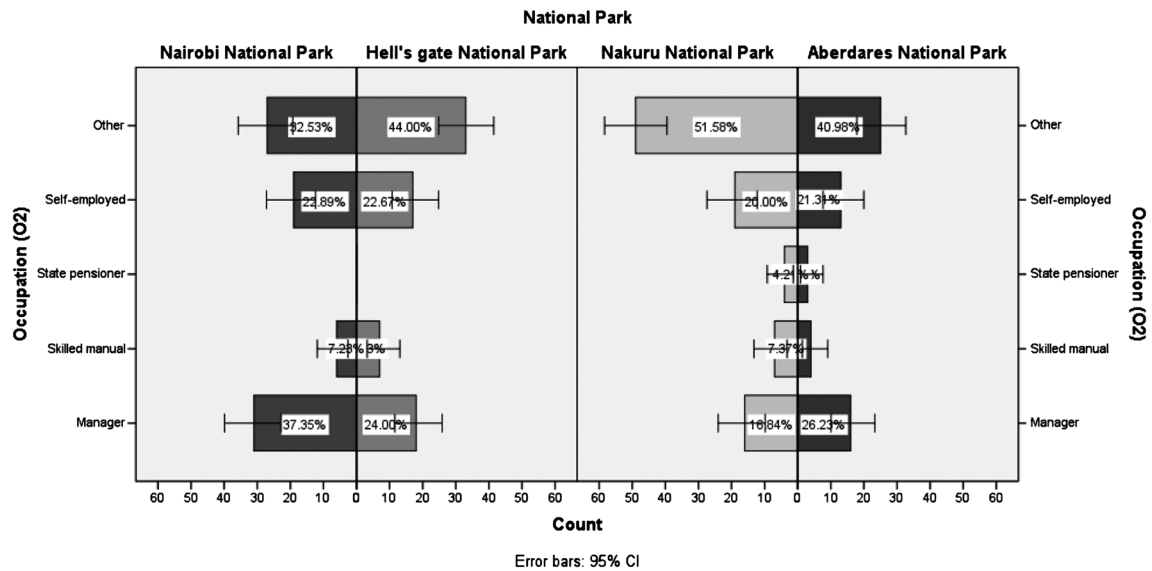


Figure 4. Occupations of visitors  $\chi^2 = 18.977$ ,  $df = 12$ ,  $p = 0.089$  and  $\alpha = 0.05$ .

Table 5. Descriptive statistics on the annual personal income of visitors to the national parks

		N	Mean	Std. Deviation	Std. Error	Coefficient of variation (cv)	95% confidence interval for Mean	
							Lower bound	Upper bound
Annual personal income	Nairobi National Park	91	2.44	1.327	0.139	0.544	2.16	2.72
	Hell's Gate National Park	87	2.47	1.860	0.199	0.753	2.07	2.87
	Lake Nakuru National Park	103	1.83	1.216	0.120	0.664	1.59	2.06
	Aberdare National Park	76	3.46	1.935	0.222	0.559	3.02	3.90
	Total	357	2.49	1.680	0.089	0.674	2.31	2.66

Source: Researchers

This was a high indication that at the time there were factors that contributed to such variances in visitor types. The fact that there were a significant proportion of international visitors to Aberdare National Park (84%) and also the fact that most visitors were, on average, married Dual Income No Kids (DINK) households and were, on average, highly educated. Further, it was also suggestive of the fact that Aberdare National Park is located in transit to high-end ranches and luxury lodges catering for the high-end premium markets.

An analysis of the percentage of visitors within the income cohorts clearly identified Lake Nakuru National Park (38.4%) as attracting the highest proportion of visitors within the < 30 000 USD p.a. income category while Hell's Gate National Park (27.1%), Nairobi National Park (21.5%) and Aberdare National Park (13.0%) followed respectively. Visitors who were not earning were more so attracted to Aberdare National Park (5.04%) while only 3.64% of visitors within the category visited Hell's Gate National Park (see Table 6 below).

As for the visitors within the high earners' bracket i.e. above (>) 90 000 USD income cohort, Aberdare National Park recorded the highest number of visitors within the category with a 47.1% and Nairobi National Park (29.4%); Lake Nakuru National Park (17.6%) and Hell's Gate National Park (5.9%) respectively. The middle-income earners within the

30 001–60 000 USD p.a. income bracket had a higher affinity to visit Nairobi National Park (37.5%) while Nakuru National Park attracted (26.1%); Aberdare National Park (18.2%) and Hell's Gate (18.2%) respectively.

#### Occupation

An analysis of the percentage of visitors within occupation showed that Nairobi National Park (38.3%) and Hell's Gate National Park (22.2%) attracted more management level occupations than Lake Nakuru National Park (19.8%) and Aberdare National Park (19.8%). At the skilled manual level, Lake Nakuru National Park (29.2%) and Hell's Gate National Park (29.2%) were more prevalent than Nairobi National Park (25.0%) and Aberdare National Park (16.7%) (see Figure 4 below).

The study identified that most of the State pensioners travelled to Lake Nakuru National Park (57.1%) and Aberdare National Park (42.9%) as compared to Nairobi National Park (0.0%) and Hell's Gate National Park (0.0%). The Self-employed visitors preferred Nairobi National Park (27.9%) and Nakuru National Park (27.9%) (see Figure 5 above). An analysis of the other occupations indicated that most of the visitors in this category were students. The student market constituted a significant 47.6% of the visitor market. Eagles (2010) notes that environmental education, targeting schools and institutions

Table 6. Distribution of annual personal incomes of visitors to selected parks

Variables	Values/cohorts	Measure	Pooled model	Nairobi National Park	Lake Nakuru National Park	Aberdare National Park	Hell's Gate National Park
Annual personal income	<30 000	Count	177	38 <sub>a,b</sub>	68 <sub>c</sub>	23 <sub>a</sub>	48 <sub>b,c</sub>
		% within income cohort	100%	21.5%	38.4%	13.0%	27.1%
		% within NP	(49.6%)	(41.8%)	(66.0%)	(30.3%)	(55.2%)
		% of Total	49.6%	10.6%	19.0%	6.4%	13.4%
30 001–60 000	Count	Count	88	33 <sub>a</sub>	23 <sub>b</sub>	16 <sub>b</sub>	16 <sub>b</sub>
		% within income cohort	100%	37.5%	26.1%	18.2%	18.2%
		% within NP	(24.6%)	(36.3%)	(22.3%)	(21.1%)	(18.4%)
		% of Total	24.6%	9.2%	6.4%	4.5%	4.5%
60 001–90 000	Count	Count	44	15 <sub>a</sub>	9 <sub>a</sub>	11 <sub>a</sub>	9 <sub>a</sub>
		% within income cohort	100%	34.1%	20.5%	25.0%	20.5%
		% within NP	(12.3%)	(16.5%)	(8.7%)	(14.5%)	(10.3%)
		% of Total	12.3%	4.2%	2.5%	3.1%	2.5%
>90 000	Count	Count	17	5 <sub>a,b</sub>	3 <sub>b</sub>	8 <sub>a</sub>	1 <sub>b</sub>
		% within income cohort	100%	29.4%	17.6%	47.1%	5.9%
		% within NP	(4.8%)	(5.5%)	(2.9%)	(10.5%)	(1.1%)
		% of Total	4.8%	1.4%	0.8%	2.2%	0.3%
Not earning	Count	Count	31	0 <sub>a</sub>	0 <sub>a</sub>	18 <sub>b</sub>	13 <sub>b</sub>
		% within income cohort	100%	0.0%	0.0%	58.1%	41.9%
		% within NP	(8.7%)	(0.0%)	(0.0%)	(23.7%)	(14.9%)
		% of Total	8.7%	0.0%	0.0%	5.0%	3.6%

Each subscript letter denotes a subset of national park categories whose column proportions do not differ significantly from each other at the 0.05 confidence level.  $\chi^2 = 71.901$ ;  $df = 12$ ;  $p = 0.000$ ; and  $\alpha = 0.05$ .

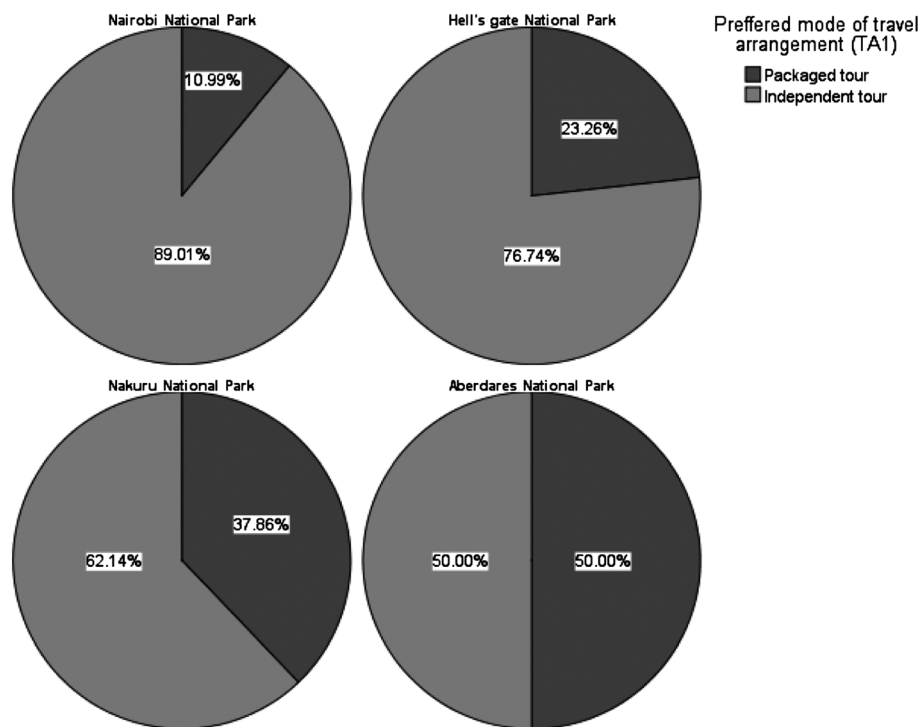


Figure 5. Preferred mode of travel arrangement.

of higher learning, is a major activity in protected areas globally. Park visitation by students is critical for the creation of societal culture that is conducive to parks. People visit parks, and appreciate the experiences gained and must have a memory of appreciation that leads to long-term attitude reinforcement. They develop a sufficiently strong attitude that causes political action towards conservation.

*Preferred mode of travel arrangement*

The findings, as indicated in Figure 5, confirmed that most visitors to the branded parks preferred independent tours to packaged tours. These visitors preferred flexible and personalized holidays that were purchased competitively. This was indeed an indication of the level of personalization of choice. Odunga (2003) attributes this level of preference to the high levels of experience, education and independence in decision-making.

A significant proportion of visitors to Nairobi, Hell's Gate and Lake Nakuru National Park preferred independent tours (i.e. 89%, 77% and 62% respectively). Fifty per cent of visitors to Aberdare National Park preferred package tours. Echtermeyer (2006) attributes such a phenomenon to the fact that globally, all the big tour operators from Europe are offering single destination trips and strive to expand the FIT (Free Independent Traveller) segment.

#### Visitors travelling with children

The research findings indicated that Nairobi National Park had the highest proportion of visitors travelling with children (44.4%), followed by Lake Nakuru National Park (21.0%); Hell's Gate National Park (18.5%) and finally Aberdare National Park (16.0%) (see Table 7 below). Therefore, there is significant need to develop visitor education and recreational programmes that would cater for this elusive segment. However, Grimm and Lohmann (2009) concur and note that with the changes in age structure as well as the household structure, the impact of this holiday segment of visitors travelling with children (under the age of fourteen years) is significant.

The degree to which the children influence purchase and choice decisions, according to Mathieson & Wall (1982), is influenced by interpersonal needs between the children and the adults, the level of product involvement and utility, as well as role power i.e. the degree in which one family member exerts influence over others in decision-making. However, parents play a most significant role in consumer socialization i.e. instilling their own values about consumption and choice to their children.

#### Level of educational attainment

A distribution of visitors by the highest level of education attained indicated that 42.08% of visitors to Nairobi National Park had an Undergraduate degree while 28.41% had attained a Masters degree. Only 13.91% of the visitors to Nairobi National Park had High School training and 11.36% PhD level training. A profile of visitors to Hell's Gate National Park showed similar variations where the majority, 39.08%, had Undergraduate degrees; 29.89% following with Masters degrees while only 15.9% and 13.8% had high school and diploma qualifications respectively (see Figure 6 below). Visitors to Lake Nakuru National Park

showed marked variations, as a considerable proportion of visitors were educated to the level of masters and undergraduate levels i.e. 27.2% and 30.1% respectively (as shown in Figure 6). Aberdare National Park showed similar findings, as a majority, 32.43% had undergraduate training while 28.38% had masters training and only 19% had high school training as the highest level of training.

The findings also collaborated with the fact that the more educated traveller prefers those activities that are value expressive (Mathieson & Wall, 1982). High levels of educational attainment among travellers, according to Goeldner and Ritchie (2012), would be highly attributable to the high visibility of a traveller culture within the social and educational system in Europe and Asia. Although the role of tourism at its meaning, as discriminated by the level of education, is largely minimal in academic research (Small, 2008), it is a significant factor to visitor choice.

#### Source of information

The results indicated that in three of the parks visited i.e. Nairobi, Hell's Gate and Lake Nakuru National Park, advice from a friend/relative was the dominant source of information, as indicated by 36%, 44% and 43% of the respondents indicating that respectively. As for Aberdare National Park, the most dominant source of information for visitors was the travel agents (28%). Additional sources of information included online search (20%), tour operators (18%) and advice from friends/relatives (18%). For Nairobi National Park, online search (15%), commercial ads (12%) and tour operators (11%) were significant sources. For Hell's Gate National Park, additional sources of information included social media (12%), tour operators (10%), travel guide (9%) and commercial ads (9%) (see Figure 7 below).

In explaining these findings, it is important to note that Rojek (1997) however added that the main elements in the social construction of tourism places include the following: first, all tourist sights depend strongly on the information sources and differentiation processes that help distinguish them from ordinary places (Urry 1990). These are supported by information signifiers in the landscape and the marketing industry; second, that the nature of the information differentiation between ordinary and extraordinary (tourism places) is cultural, as the relationship between the tourist and the

Table 7. Visitors travelling with children to the selected national parks

Variables	Values/cohorts	Measure	Pooled model	Nairobi National Park	Nakuru National Park	Aberdare National Park	Hell's Gate National Park
Travelling with children	Yes	Count	81	36 <sub>a</sub>	17 <sub>b</sub>	13 <sub>b</sub>	15 <sub>b</sub>
		% within category	100%	44.4%	21.0%	16.0%	18.5%
		% within NP	22.8%	39.6%	16.7%	17.1%	17.4%
	No	% of Total	22.8%	10.1%	4.8%	3.7%	4.2%
		Count	274	55 <sub>a</sub>	85 <sub>b</sub>	63 <sub>b</sub>	71 <sub>b</sub>
		% within category	100%	20.1%	31.0%	23.0%	25.9%
	% within NP	77.2%	60.4%	83.3%	82.9%	82.6%	
	% of Total	77.2%	15.5%	23.9%	17.7%	20.0%	

Each subscript letter denotes a subset of national park categories whose column proportions do not differ significantly from each other at the 0.05 confidence level.

$\chi^2 = 19.496$ ;  $df = 3$ ;  $p = 0.000$ ; and  $\alpha = 0.05$ .

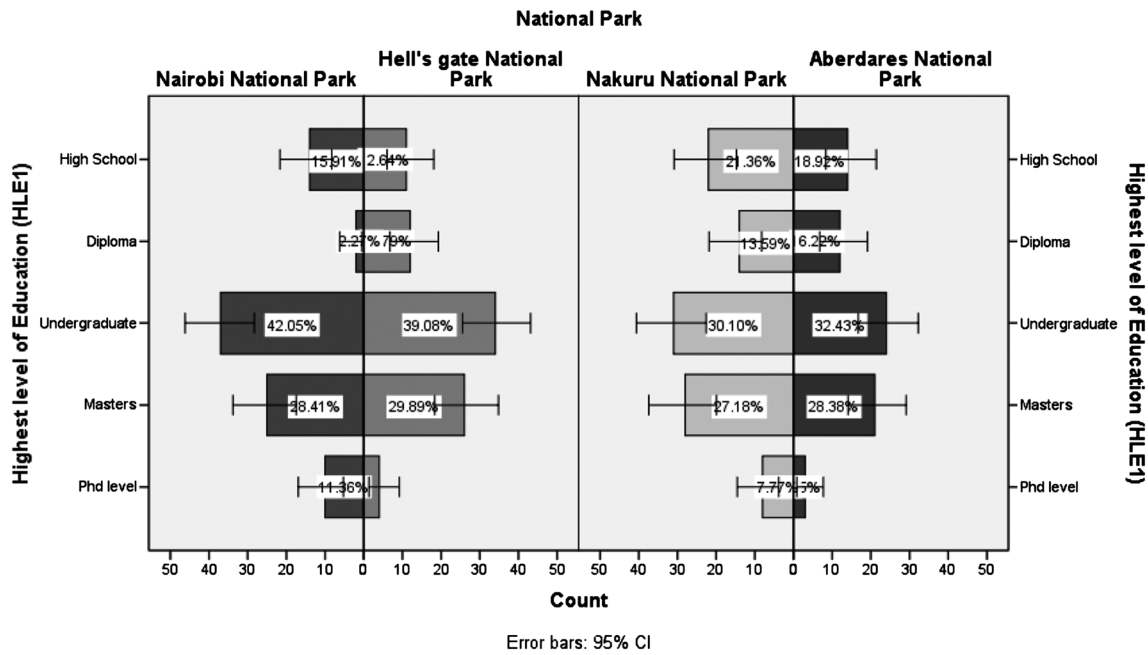


Figure 6. Visitors' highest level of education attainment.

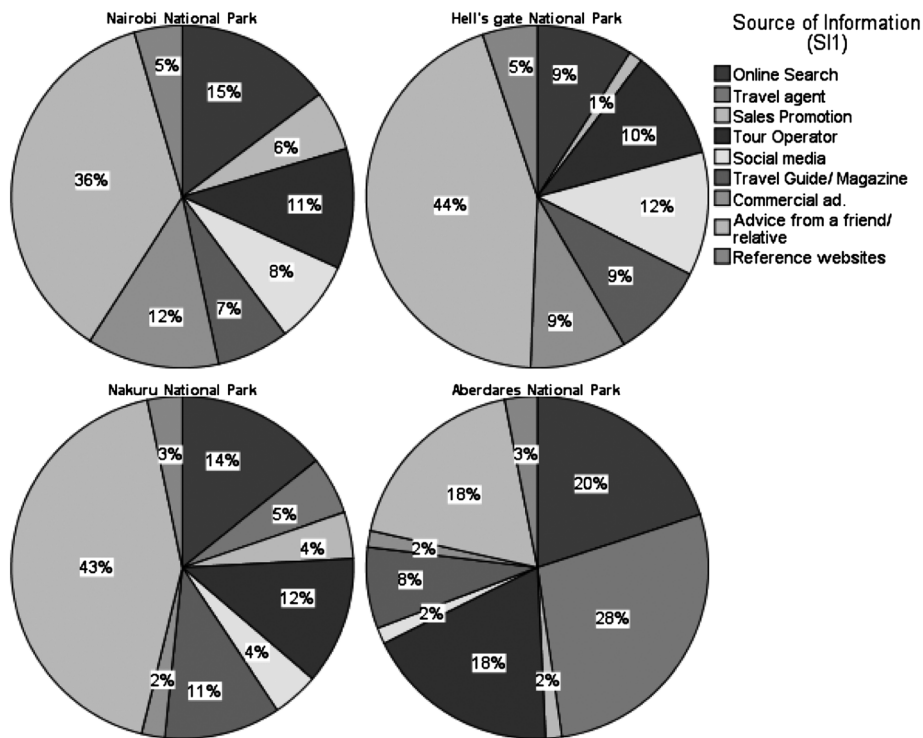


Figure 7. Source of Information on park brand.

sight is always culturally detailed and mediated; and finally, the distinction between the ordinary and the extraordinary seems to have been traditionally undermined by the 'television culture'.

**Examining the antecedent factors influencing their market positioning and choice**

*Multinomial regression*

The results indicated in Table 8 below show the multinomial logistic coefficients (B) for each predictor variable within the

alternative categorical outcome variable. The Likelihood ratio chi-square test as well as the Pearson chi-square test indicated that the model fit was significant  $\chi^2=138.004$ ; Degree of freedom (df)=48;  $p < 0.05$  and  $\chi^2=750.425$ ; df= 606;  $p < 0.05$  respectively. These results were suggestive that there was a significant relationship between the dependent variable (choice of park) and a combination of independent variables. The Pseudo R-square correlation measures to assess significance of the relationships indicated, that the level of association were significantly high i.e. Cox and Snell

$R^2=0.760$ ; Nagelkerke  $R^2=0.685$  and Mc Fadden  $R^2=0.662$ .

The likelihood ratio test results, as indicated in Table 9, indicated that there was a significant relationship between choice of park and the state of roads and infrastructure ( $p < 0.05$ ), travel agency recommendation ( $p < 0.05$ ), local culture ( $p < 0.05$ ), service quality ( $p < 0.05$ ), activity at the destination ( $p < 0.05$ ) as well as accommodation quality ( $p < 0.05$ ).

The parameter estimates indicated that for Nairobi National Park, roads and infrastructure, travel agency recommendation, local culture, reference from tour operators and

accommodation quality, as shown in Table 8 were significant in distinguishing choice of Nairobi National Park from the reference category i.e. Aberdare National Park. These factors can be linked to the regression equation as follows:  $Y = 1.269 + 1.035x_2 - 0.524x_4 + 0.575x_7 - 0.430x_{11} - 0.715x_{15} + \epsilon$ .

These findings were indicative of the significance of access and amenity factors, as well as institutional factors, in influencing choice of Nairobi National Park vis-à-vis Aberdare National Park. It was notably important, however, to note that travel agency recommendations, references from tour operators and accommodation quality within the park negatively influenced choice of Nairobi National Park.

Table 8. Likelihood ratio tests

Effects	Model fitting criteria -2 Log likelihood of reduced model	Likelihood-ratio tests		
		Chi-square	df	Sig.
Intercept	643.176	5.687	3	0.128
Destination image	642.392	4.903	3	0.179
Roads and infrastructure	670.157	32.669	3	0.000*
Safety and security	639.032	1.544	3	0.672
Travel agency recommendation	647.375	9.886	3	0.020*
Information on the Web	643.558	6.069	3	0.108
Destination's attractions	640.547	3.058	3	0.383
Local culture	652.119	14.630	3	0.002*
Sponsored events	640.297	2.808	3	0.422
Cost of holiday	642.232	4.744	3	0.192
Promotion	640.213	2.724	3	0.436
Reference from tour operator	642.832	5.343	3	0.148
Service quality	653.012	15.523	3	0.001**
Activity at the destination	647.774	10.285	3	0.016*
Previous travel experience	639.507	2.019	3	0.569
Accommodation quality	657.657	20.168	3	0.000**
Market presence of the park	638.035	0.546	3	0.909

The chi-square statistic is the difference in -2 log-likelihoods between the final model and a reduced model. The reduced model is formed by omitting an effect from the final model. The null hypothesis is that all parameters of that effect are 0.

\* $p < 0.05$ ;

\*\* $p < 0.001$

Table 9. Factors influencing choice of Nairobi National Park

National Park <sup>a</sup>		B	Std. Error	Wald	df	Sig.	Exp(B)
Nairobi National Park	Intercept	1.269	1.691	0.563	1	0.453	
	Destination image ( $x_1$ )	0.242	0.274	0.779	1	0.378	1.274
	Roads and infrastructure ( $x_2$ )	1.035	0.214	23.410	1	0.000*	2.816
	Safety and security ( $x_3$ )	-0.232	0.200	1.347	1	0.246	0.793
	Travel agency recommendation ( $x_4$ )	-0.524	0.203	6.676	1	0.010*	0.592
	Information on the Web ( $x_5$ )	0.122	0.215	0.323	1	0.570	1.130
	Destination's attractions ( $x_6$ )	-0.367	0.244	2.267	1	0.132	0.692
	Local culture ( $x_7$ )	0.575	0.248	5.383	1	0.020*	1.777
	Sponsored events ( $x_8$ )	0.013	0.174	0.005	1	0.941	1.013
	Cost of holiday ( $x_9$ )	0.338	0.195	2.997	1	0.083	1.402
	Promotion ( $x_{10}$ )	-0.064	0.202	0.100	1	0.752	0.938
	Reference from tour operator ( $x_{11}$ )	-0.430	0.205	4.389	1	0.036*	0.650
	Service quality ( $x_{12}$ )	0.376	0.238	2.491	1	0.114	1.457
	Activity at the destination ( $x_{13}$ )	-0.356	0.251	2.009	1	0.156	0.700
	Previous travel experience ( $x_{14}$ )	0.164	0.207	0.628	1	0.428	1.179
	Accommodation quality ( $x_{15}$ )	-0.715	0.237	9.077	1	0.003*	0.489
Market presence of the park ( $x_{16}$ )	0.146	0.208	0.493	1	0.483	1.157	

The reference category is: Aberdare National Park.

Note

\* $p < 0.05$

$Y = 1.269 + 1.035x_2 - 0.524x_4 + 0.575x_7 - 0.430x_{11} - 0.715x_{15} + \epsilon$

As for Hell’s Gate National Park, roads and infrastructure, references from tour operators and accommodation quality (as included in the likelihood ratio test results) in Table 10 above were significant in distinguishing choice of Hell’s Gate National Park from the reference category i.e. Aberdare National Park. These factors can be linked to the regression equation as follows:  $Y=0.108 + 0.715x_2 - 0.391x_{11} + 0.624x_{15} + \varepsilon$ .

It was notably important however to note that travel agency recommendations, references from tour operators and expectations on accommodation quality within the park negatively influenced choice of Nairobi National Park (see Table 8 below). This finding was significantly indicative of

the fact that the visitors felt that these factors were deterrents to choice of Hell’s Gate National Park.

As for Lake Nakuru National Park, travel agency recommendation, information on the web, cost of holiday and accommodation quality, as indicated in Table 11 below, were significant in distinguishing choice of Lake Nakuru National Park from the reference category i.e. Aberdare National Park. These factors can be linked to the regression equation as follows:  $Y=2.202 - 0.475x_4 + 0.412x_5 + 0.392x_9 - 0.926x_{15} + \varepsilon$ . The findings were quite evident on the importance of web content and accommodation quality on influencing choice of Lake Nakuru National Park from the reference category i.e. Aberdare National Park.

Table 10. Factors influencing choice of Hell’s Gate National Park

National Park <sup>a</sup>		B	Std. Error	Wald	df	Sig.	Exp(B)
Hell’s Gate National Park	Intercept	0.108	1.566	0.005	1	0.945	
	Destination image ( $x_1$ )	0.495	0.258	3.683	1	0.055	1.640
	Roads and infrastructure ( $x_2$ )	0.715	0.197	13.143	1	0.000*	2.044
	Safety and security ( $x_3$ )	-0.200	0.197	1.030	1	0.310	0.818
	Travel agency recommendation ( $x_4$ )	-0.197	0.197	0.998	1	0.318	0.821
	Information on the Web ( $x_5$ )	0.031	0.204	0.023	1	0.880	1.031
	Destination’s attractions ( $x_6$ )	-0.153	0.230	0.442	1	0.506	0.858
	Local culture ( $x_7$ )	-0.078	0.212	0.133	1	0.715	0.925
	Sponsored events ( $x_8$ )	-0.103	0.170	0.366	1	0.545	0.902
	Cost of holiday ( $x_9$ )	0.351	0.193	3.305	1	0.069	1.421
	Promotion ( $x_{10}$ )	0.185	0.193	0.915	1	0.339	1.203
	Reference from tour operator ( $x_{11}$ )	-0.391	0.198	3.893	1	0.048*	0.677
	Service quality ( $x_{12}$ )	-0.350	0.224	2.431	1	0.119	0.705
	Activity at the destination ( $x_{13}$ )	-0.036	0.247	0.021	1	0.884	0.965
	Previous travel experience ( $x_{14}$ )	0.281	0.201	1.955	1	0.162	1.325
	Accommodation quality ( $x_{15}$ )	0.624	0.226	7.647	1	0.006*	0.536
	Market presence of the park ( $x_{16}$ )	0.121	0.202	0.361	1	0.548	1.129

The reference category is: Aberdare National Park.

Note.

\* $p < 0.05$

$$Y = 0.108 + 0.715x_2 - 0.391x_{11} + 0.624x_{15} + \varepsilon$$

Table 11. Factors influencing choice of Lake Nakuru National Park

National Park <sup>a</sup>		B	Std. Error	Wald	df	Sig.	Exp(B)
Nakuru National Park	Intercept	2.202	1.479	2.217	1	0.136	
	Destination image ( $x_1$ )	0.090	0.245	0.135	1	0.714	1.094
	Roads and infrastructure ( $x_2$ )	0.317	0.195	2.639	1	0.104	1.373
	Safety and security ( $x_3$ )	-0.122	0.206	0.352	1	0.553	0.885
	Travel agency recommendation ( $x_4$ )	-0.475	0.199	5.669	1	0.017*	0.622
	Information on the Web ( $x_5$ )	0.412	0.210	3.846	1	0.040*	1.509
	Destination’s attractions ( $x_6$ )	-0.310	0.235	1.750	1	0.186	0.733
	Local culture ( $x_7$ )	-0.191	0.213	0.805	1	0.369	0.826
	Sponsored events ( $x_8$ )	0.158	0.179	0.777	1	0.378	1.171
	Cost of holiday ( $x_9$ )	0.392	0.193	4.105	1	0.043*	1.480
	Promotion ( $x_{10}$ )	-0.064	0.203	0.101	1	0.751	0.938
	Reference from tour operator ( $x_{11}$ )	-0.290	0.205	1.989	1	0.158	0.748
	Service quality ( $x_{12}$ )	-0.252	0.229	1.216	1	0.270	0.777
	Activity at the destination ( $x_{13}$ )	0.390	0.256	2.315	1	0.128	1.477
	Previous travel experience ( $x_{14}$ )	0.163	0.198	0.676	1	0.411	1.177
	Accommodation quality ( $x_{15}$ )	-0.926	0.228	16.458	1	0.000*	0.396
	Market presence of the park ( $x_{16}$ )	0.082	0.207	0.159	1	0.690	1.086

The reference category is: Aberdare National Park.

Note.

\* $p < 0.05$

$$Y = 2.202 + 0.412x_5 - 0.475x_4 + 0.392x_9 - 0.926x_{15} + \varepsilon$$

The research findings were indicative of the fact that travel agency recommendations, accommodations quality, as well as references from tour operators were comparable factors that played a significant role in determining/detering the choice of Nairobi National Park, Hell's Gate National Park and Lake Nakuru National Park vis-à-vis Aberdare National Park.  $Y = 2.202 + 0.412x_5 - 0.475x_4 + 0.392x_9 - 0.926x_{15} + \varepsilon$ . These findings were also suggestive of the significant role that institutional referrals played in determining and or deterring the choice of park brand. It was only Lake Nakuru National Park where direct referrals from the web significantly influenced choice of park brand. Similarly, the visitors to Lake Nakuru National Park felt that the cost of holiday significantly influenced their choice of park brand to visit. Since cost of holiday positively and significantly influenced choice of Lake Nakuru National Park, then it is important that pricing strategy for the park management authority assesses the impact of the overall cost of holiday on visitor choice.

#### Conclusions and recommendations

General patterns in the findings and observations imply that the park brand had a differentiated market profiling and had significant attributes that affected destination choices of visitors. In conclusion, to address broad national tourism goals and address the research problem, the study affirms that there is need to ensure that park branding offers value to its targeted and unique market segments. The research findings were suggestive of the underlying fact that the tourist product/experience is a consequence of the exact visitor need. Therefore, there is a need to focus branding on the nature of visitor experiences and post-visit intentions by responding with a branding strategy that differentiates the parks, responds to visitor needs and augments the park's brand identity and association.

The study findings point out that visitors are becoming more experiential and personal in their tourism choices, making them more critical, independent and more determined to achieve their ideal holiday needs. Individualism and perception may significantly account for the growing need for unique experiences and park brand personalities that generate them. It is also important that tourism policy addresses the need to develop coherent and sustained information promotion of KWS park brands based on market needs at the international, regional, national, county and city level.

The park brand focus should shift from mere 'mind-share branding' i.e. differentiating from competition to providing more meaning or life to the brand through 'emotional branding', which builds upon the mind share/brand perception and emphasizes on how the brand personality should be communicated through emotional appeals. There is need for KWS to communicate high value to the client through a local storyline. The essence of the park brand needs to be identified, felt and perceived positively from the initial contact with the visitor throughout the holiday to the departure of the visitor. The park brand should help create a sense of feel (affect and emotions), think (creativity and cognition), act (individual actions and lifestyle) and relations (connection with a reference group or culture).

It is therefore important for the Kenyan tourism stakeholders to assess and develop key aspects of the park brand. These key factors in determining the efficacy of park branding include park brand communication, packaging, experience, personality, design, perception and partnerships at the destination level. There is need to ensure that these efforts are in-line with the National Tourism Policy and Vision 2030 that echoes the need for product choice, quality and diversity (GoK, 2008).

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