



Sports Industry Stakeholder Study

Prepared for: Ministry of Sports Ministry of Sports, Culture and Heritage, Kenya

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Presented on 7th May 2019 at MISC Kasarani and handed to:

The Cabinet Secretary Amb. Amina Mohammed, EGH

The Permanent Secretary Amb. Kiriti Kaberia, CBS

Report

Rationale



- ❑ Generate insights to inform a strategy which will lead to better conversations with sports stakeholders
- ❑ Generate round table conversations on how to transform the country's sporting landscape
- ❑ Elevate the country globally in terms of sports and high performance

- ❑ This is in line with the ministry's mandate which is to *"develop and coordinate sports; promote and develop sports facilities; and spearhead the expansion of the sports industry"*.

- ❑ Stakeholders targeted in this study:
 - Sports federations' top brass (chairman and CEOs)
 - Media: Sports journalists
 - Corporates



MINISTRY OF SPORTS,
CULTURE AND HERITAGE



Study Objective and Key Information Areas



- ❑ The overall objective of the study was to understand Kenya's sporting environment and key areas of improvement

Key information areas



- ❑ Understanding the operations within the different sports federations
- ❑ Understand the role of media and corporates in sports growth in the country
- ❑ Establish the compliance of federations with the Sports Act 2013
- ❑ Understand stakeholders' perceptions towards the Sports Fund, its mandate and the actions towards the growth of sports in the country
- ❑ Test the concept of multi-sports activity

Methodology



- ❑ The study used a purely qualitative research which involved the use of key informant interviews with the target stakeholders.

Federations

They deal directly with the clubs and the sports men & Women. 16 registered federations in Kenya were interviewed.

Media

Media is an influential partner of sports whose key role is ensuring transfer of information, attitudes and Knowledge among the stakeholders in sports i.e. the ministry, the sportsman, the fan, and the federation. 12 media personalities were interviewed.

Corporates

Corporates play a key role in sports sponsorship and legacy programs that help in capacity building. 10 corporates were interviewed.



Key Findings: Sports Act Compliance

Sports Act Compliance



Federation	Registration	Audited Accounts	Strategic Plan Existence	Strategic Plan Execution	Secretariat	No of staff in secretariat	Branches
Federation 1	✓	✓	✓	✓	✓	1	20
Federation 2	✓	✓	✓	✓	✓	4	6
Federation 3	✓	✓	✓	✓	✓	15	0
Federation 4	✓	✓	X	X	X	X	10
Federation 5	✓	✓	✓	✓	X	X	9
Federation 6	✓	✓	✓	✓	X	X	12
Federation 7	✓	✓	✓	✓	X	X	1
Federation 8	✓	✓	✓	✓	X	X	12
Federation 9	✓	X	✓	X	X	X	33
Federation 10	✓	✓	✓	✓	✓	36	47

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Key Findings: Perceptions Towards Ministry of Sports, Culture, and Heritage

If the Ministry were an Animal...

What Federations, Corporates & Media said ...



Sheep

- ❑ **None aggressive**– The ministry burying their heads and pretend everything is okay.



Headless Animal

- ❑ **No life**– It is difficult to understand how to deal with the ministry.



Chameleon

- ❑ **Camouflage**– they keep changing with the environment. The ministry lacks a consistent stand on anything to do with sports in the country.



Wolf

- ❑ **A top predator**– It is a top predator in the jungle. The ministry is biting rather than being a producer.



Tortoise

- ❑ **Slow**– they are very slow. The ministry is very slow in handling matters and in decision making. It also finds safety in retreating into its shell.



Stray dog

- ❑ **Homeless**– the ministry is not in touch with what is happening in the sports word

What is inferred about the Ministry

Non
Aggressive

Slow

Greedy



Cannot be
trusted

If the Ministry were an Animal...

What Federations, Corporates & Media said ...

What is inferred about the Ministry



Lion

- ❑ **The king of jungle** – they are the leaders in the jungle. The ministry is doing its best to ensure there is order in sports.



Elephant

- ❑ **A big animal** This means that the Ministry has a big role which is to overlook all the sports federations.



Bull

- ❑ **Helpful**– can be used for other uses.



Cat

- ❑ **Has many lives**– It is because there's been improvement in the sports docket. With time it is promising.

Implication

Big institution

Helpful

Potential better results



Promising





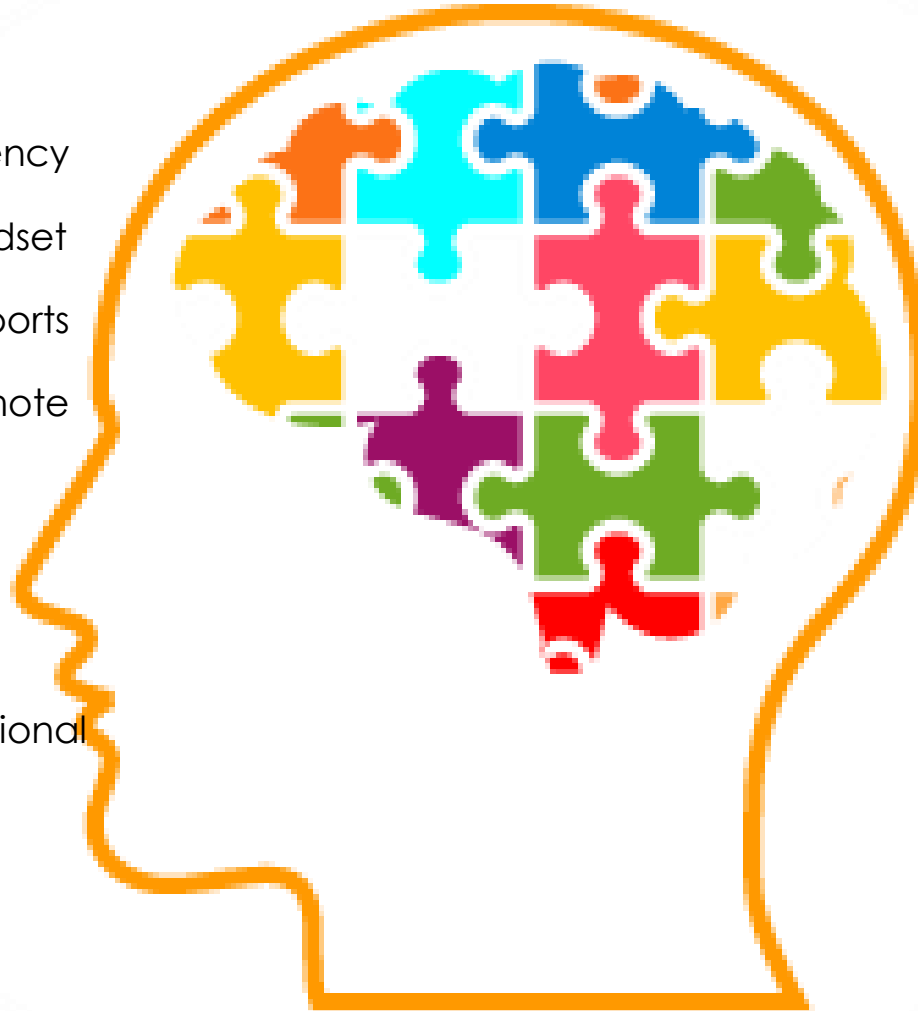
Key Findings: Stakeholder Mindset

About the Federations

- There is lack of funds and transparency among federations
- The team needs to have a business mindset
- They lack systems and structures
- They have not fully complied with the sports act
- The federations need to promote transparency & accountability
- Submit their annual budget in time

About the Ministry

- Lacks one point of contact
- Support and finance federations for regional and international events
- Develop sport infrastructure
- Build capacity of federations
- Partner with corporates to uplift sports
- Clearly communicate its mandate
- Create partnerships with the county government
- Avail facilities for training when teams are going for international events



About the Media

- Project all sports and have more space in the prime time
- Promote more of local sports and encourage Kenyans to attend events.

About Corporates

- There is need for better sponsorship deals to improve sports
- Improve sponsorship packages
- Build capacity of federations

About the Federations

- Federations should not request for funds from the sports fund on a need basis, they need to have financial budgets for the year and operate within that
- They need to have clear structures
- There is need for accountability

About the Ministry

- Ministry needs to help in sports infrastructure development
- Support and finance federations for regional and international events
- Ministry should offer tax rebates to cooperates who sponsor sports
- Ministry will need to recommend sponsors to the federations
- Organize regular round tables for stakeholder
- Support women in Sports



About the Media

- Give irrational reporting
- Help rally Kenyans in attaining events e.g. JAZA Stadie

About Corporates

- Help develop content for media

About the Federation

- Lack of governance, transparency and accountability
- Lack of structures
- Promote Women in Sports

About the Media

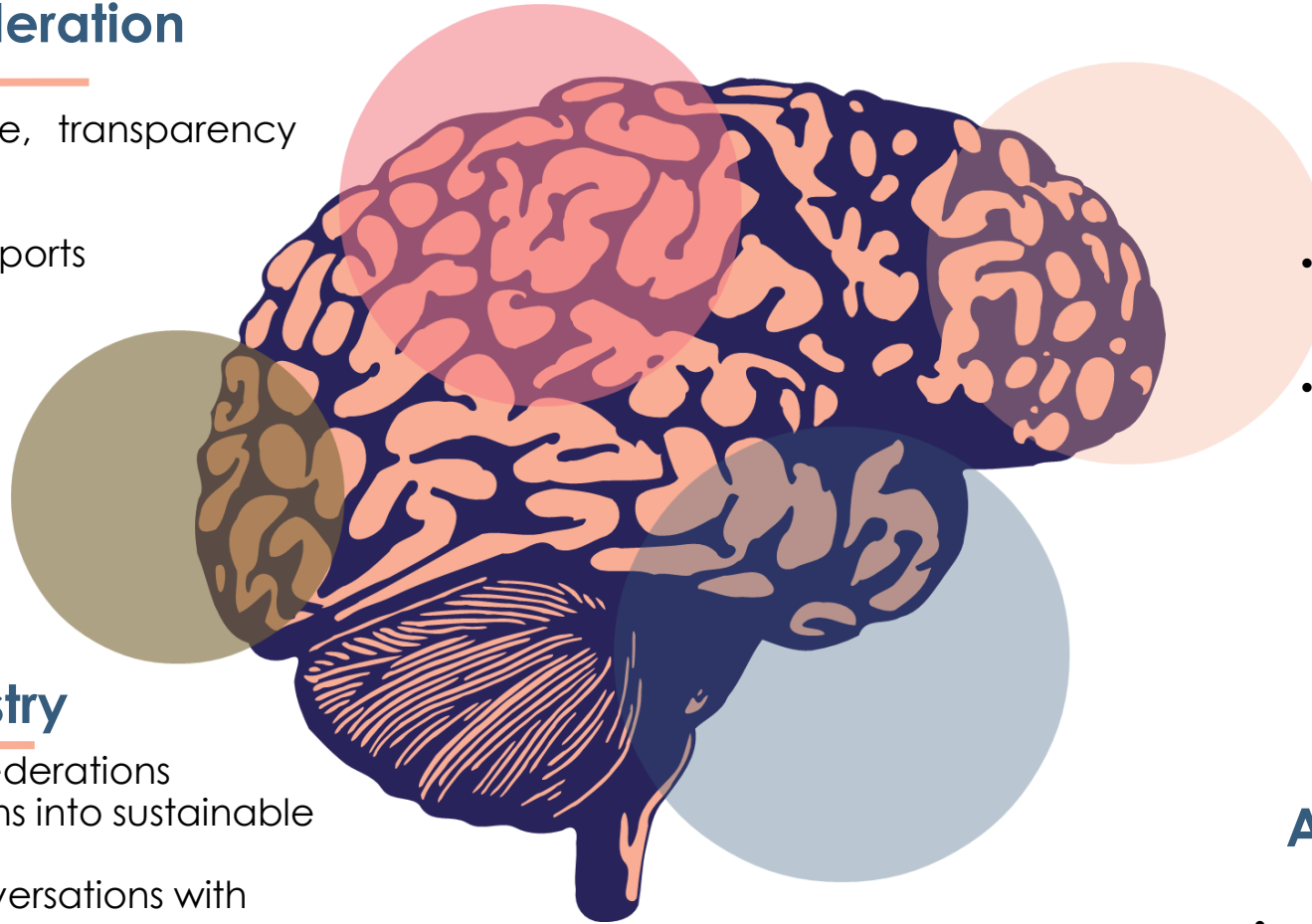
- Actively get involved in enlightening the public on what is happening in sports
- Help in mobilizing people on sports activities

About the Ministry

- Help build capacity of federations
- Help in turning federations into sustainable entities
- Create round table conversations with stakeholders
- Invest in Women sports
- Release periodic briefs to the public

About Corporates

- The corporates needs to offer support in development of sports



Expected Roles for Sports Improvement



Expected Role	Ministry	Federation	Corporates	Media
Capacity Building of Federations	✓	✓	✓	✓
Governance Training for Federations	✓	✓	✓	
Financial Management for federations	✓	✓	✓	
Coaching exchange programmes and coaching clinics from international (creating linkages and funding)	✓	✓		
Assistance in fundraising efforts (engaging the private sector in Kenya)	✓	✓	✓	
Taxes rebates (Sports equipment & Corporates sponsorships)	✓	✓		
Single Point of Contact (SPOC)	✓	✓	✓	✓
Media enlightenment and sensitization of sports	✓	✓		✓

How the ministry can help in capacity building



- ❖ Collaboration with local and international specialists across various fields to impart knowledge in terms of:
 - ❖ Technical expertise (Coaching and related coaches)
 - ❖ Financial management and sustainability
 - ❖ Sports science
 - ❖ Media



- ❖ Facilitate the access to training facilities



- ❖ Providing clear and responsive communication channels which enable federations communicate their needs in good time. This can be helpful in solving issues such as disbursement of allowances to the players



- ❖ Create linkages between sponsors and federations



"...collaborate with international federations to bring in professional coaches. The ministry can collaborate with the ministry of foreign affairs to collaborate with other countries..." **Federation KII**



"...ministry should help in having training sports officials, or people who run the sports, especially governance, finance and marketing. They are also in position to start academies, like there was a time they had started academies all over the country for different sports, so during the holiday, that's April, August and December they would host students..."

Federation KII



"...I think the ministry should help in education and training, despite federations having their own training, I think also exchange programs, as much people say they are going for bench marking, I think exchange program are better..."

Journalist KII



"...How do we strengthen and increase capacity of the people and federations? I think the rain has been beating us for a long time, do we have the right people running federations, do we have professionals managing secretariats of federations, leave the politicians, leave the chairman elected, but the people actually. Do we have sports marketers in federations who are trained and do they have capacity? The ministry should help in capacity building..." **Corporate KII**

“...The CS need to tell us what she can do, what she cannot do then without false promises and go home to sleep. 70% of federations challenges will be solved with the truth and she will be the best CS ever to happen in this country ...” **Federation KII**

“...There's very little proper structure that are set up, to capture the talent from down there...” **Journalist**

“...I think the ministry should help in education and training, despite federations having their own training, I think also exchange programs, as much as people say they are going for bench marking, I think exchange program are better...” **Journalist KII**

“...There is a need for a legal framework which is direct to govern federations and sports edities. Also the ministry need to have people who have sports at heart,most people at the ministry have no clue of what needs to be done” **Federation KII**

“...Now that the Ministry is being led by Ambassadors, they should use their linkages to connect our sportsmen and Women who are our real ambassadors to high level training facillities internationally....” **Corporate KII**

“...if the government have government relations with other government it can have programs, which federations can get into, train their coaches, train their administrators , so they can be able to run the federations in a professional manner, that will go a long way. Most federations are just volunteers who are just there for their own benefit y....” **Journalist KII**

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Key Findings: County Governments' Support to Federations

Role of Counties in Sports Growth



Kenyan Counties

- Offer financial support to federations
- Support infrastructural development
- Host sports events at the county level
- Forge partnerships with federations, county and the ministry
- Sports advocacy through schools
- Organize Intercounty champions

“...the counties don't seem to be allocating money for sports. The sports act demands that we have a presence at the county level but when you go at the county level they tell you they have more urgent matters to attend to, so they don't allocate money to sports..” **Federation KII**

“...the county governments have a budget for sports and we have county bodies who are our branches, so they should actually host one event per sport, that will go a long way to bringing a lot of people together this will help in increasing the competitiveness of particular sports...” **Federation KII**

“...the counties should be open for the federation, then the federations can bring the equipment and trainings. There should be a collaboration between the federations, county and the national government...” **Federation KII**

“...by providing infrastructure at the community level. The other way, is development, the county government can have schools in their counties encouraged to participate in sports...” **Federation KII**



Key Findings: National Sports Fund

Perception of National Sports Fund

Mandate (Constitution)

To establish and maintain a regulatory environment for Funding Sports development.

To increase the number of sports persons and organizations participating in sports locally and globally through supporting professional leagues.

To create and maintain a pool of skilled and globally competitive staff.

Support infrastructure development for nurturing of talent.

Perception of Mandate

Use money from the taxation

They lack funds to support sporting activities

No transparency for activities

Achievements

Supported the football team for the for the journey to cup of nations

Recommendations

They need to accommodate different sports needs

Must be structured and have a set criteria on how to distribute the funds

Need to disseminate stakeholders on their mandate



Concept Testing

Concept testing is the process of using surveys to evaluate consumer/stakeholder acceptance of a new product idea prior to the introduction of a product to the market.



The study sought to understand the perceptions of the stakeholders on the following concepts:

- 1) Would the stakeholders support an all inclusive multidisciplinary sports activity bringing together all federations in the country?
- 2) Would the stakeholders support an independent pool of resources to fund the concept?

Concept Testing: Multi Disciplinary Sports



Appeal

All stakeholders say they would support a Multi-Sports activity. This is because it would offer an opportunity for federations to learn from each others experiences.

Concept Benefits

- Will create a lot of excitement and bring vibrancy in the sports industry.
- This concept would offer an opportunity for federations, media and corporates to manage and market the events together.
- Implementation of the concept will be an opportunity to see new talents
- Multidisciplinary will put Kenya on the world map

Concept Perceived Impact

The Multi – Sports activity will:

- Unite Kenyans
- Promote sports tourism
- Lead to increased media coverage of sport activities
- Increased brand awareness and interest in sports
- Lead to job creation
- Increased brand awareness and sponsorships
- A great legacy program

Multidisciplinary is where different sports are played in same county with the same period of time

Concept Testing: Public Private Partnerships Funding



Appeal

All interviewed stakeholders would support a Public+ Private Partnership for a pool of funds.

Concept claims

- The stakeholders are willing to support any transparent and well managed initiative that supports sports in Kenya

Concept Perceived Impact

This concept will:

- Restore trust in sports and receive public good will.
- Will provide diversity and strength from different players.
- It will create trust and cohesiveness amongst stakeholders.
- Create better sporting environment and facilities.
- Improve quality of teams and performances.



Thank You!

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