



REPUBLIC OF KENYA

**MINISTRY OF TOURISM AND WILDLIFE
STATE DEPARTMENT FOR TOURISM**

Tourism Policy

on

Resetting Sustainable Tourism in Kenya

January 2021

FOREWORD

Tourism is one of the key economic drivers in Kenya. In 2018, for example, it generated 8.8% of the country's GDP, amounting to USD 7.9 billion, which represented a growth of 5.6% - greater than global and sub-Saharan Africa averages of 3.9% and 3.3%, respectively. The sector also has high multiplier effects given that its growth stimulates further development in other sectors. Over the years, tourism has consistently contributed to over 10% of total employment in Kenya, 9% to GDP, 18% foreign exchange earnings, and 11% Government revenues in form of taxes, duties, license fees, and park entry fees, among others.

Enactment of this policy was done ten years after Sessional Paper No. 1 of 2010 on Enhancing Sustainable Tourism was formulated. Over the ten-year period following the enactment of the policy, major changes and developments have occurred, which call for re-imagination and re-engineering of the sector so as to maintain and sustain the sector's contribution to the country's socio-economic growth. These include the establishment of key institutions, an empowered citizenry, and the promulgation of the Constitution of Kenya, 2010 brought about a new constitutional dispensation with a different architecture of governance with shared responsibility for tourism between the national and county governments. Such new instruments to guide the country's tourism sector as the National Tourism Blueprint 2030 (NTB2030), recommendations of the Presidential Taskforce on Parastatal Reforms, and the Executive Order No. 1 of May 2020 required revision of the tourism policy to align accordingly. Furthermore, the country's tourism sector experienced turbulences like COVID-19, threats from political polarization, safety and security concerns, threats to the environment and culture, rapid technological evolutions, and other social dynamics, among others.

More recently, the Ministry identified areas that need to be strengthened or changed to guarantee resilience and sustainability in the sector through rigorous participatory processes. Implementing these, coupled with increased funding to the sector, more fervent stakeholder involvement, astute tourism enterprise development, and informed investment in, and for, the sector will guarantee quick recovery of the sector when faced with threats and sustainable growth. Review of the sector's underpinning policy was imperative to embrace the foregoing and position the sector for resilience and sustainability in the face of the dynamics in the sector, the Sustainable Development Goals and other global and regional developments, and such threats to the sector as climate change and COVID-19.

This policy seeks to ignite accelerated re-engineering of Kenya's tourism sector, including clarifying and consolidating the roles of various actors, and strengthening the role of the private sector so as to deliver resilience and sustainability in the sector. The policy draws from lessons learned in implementing the recommendations of the Tourism Recovery Taskforce of 2014, as well as findings of the Kenya Tourism Sector Diagnostic Report that formed basis for the development of NTB2030. Among other key areas that the policy focuses on is

increased funding, stakeholder support, enterprise development, capital investments, and consolidation of roles and mandates to enhance synergy.

The policy is underpinned by the fact that over the years, tourism has become an extremely competitive business. A paradigm shift in investment in, and management of, the sector are critical for enhanced resilience and sustainability. Focus must shift from the traditional tourism products to resilient and sustainable tourism. As such investing in approaches and forward-thinking aimed at delivering a vibrant, innovative, booming, resilient and sustainable tourism, while meeting the aspirations espoused in Vision 2030, will be required.

It will especially be imperative that we harness our cultural diversity to make our tourism authentic. Hitherto this policy, our tourism products had been found to be uninspiring, tired, and enclavic. This requires concerted efforts by all stakeholders to reverse the trend. Tourism infrastructure, tourism marketing, and tourism investments will have to be aligned with tourism sector expectations, through long-range planning.

This policy introduces new approaches and ideas for making Kenyan tourism vibrant, innovative, booming, resilient, and sustainable. It calls for forward thinking and agility and ability to respond to the ever changing dynamics in the tourism sector. Attention will be given to innovation and change in respect of our tourism product, tourism marketing, tourism infrastructure, tourism investments. Institutional strengthening, human capital, tourism financing, and research and knowledge management.

This policy is a statement of government intent that provides a broad range of principles, themes, and thrusts to be pursued toward achieving a resilient and sustainable Kenyan tourism. The policy was developed through a participatory and consultative process that involved stakeholders, as provided for by the Constitution of Kenya.

I thank my colleagues in government, the technical working groups, and all stakeholders that contributed toward developing this tourism policy. I invite all Kenyans, and investors desirous of investing in our tourism, to take advantage of the opportunities that this policy presents.

HON. NAJIB BALALA, EGH
CABINET SECRETARY

PREFACE

Kenya has a unique environment and natural heritage. Its pristine beaches and snow-capped mountain to such varied landscapes as the Rift Valley, lake basins, forests, and vast savannah and rangelands that beam with wildlife as well as rich cultural diversity makes it a country of magical contrasts. The people of Kenya and the country's rich heritage are vital drivers of vibrancy in our tourism. The famous Maasai Mara annual wildebeest migration, the country's unique landscapes, and many other activities that are organized in the country, give Kenya its tourism magical touch.

This policy is underpinned by our resolve to have a tourism sector that is both sustainable and resilient to such shocks as pandemics and acts of terrorism. To achieve this, we will have to embrace, in a holistic way, all the facets of our tourism, namely, the tourism product, tourism marketing, tourism infrastructure, and tourism investments. Research and knowledge management, innovation and change, and service excellence will have to define the way we do our tourism.

The policy has nine chapters that capture key information and actions that we will rely on in making our tourism truly resilient and sustainable.

Chapter one provides the background information on tourism, the rationale for enacting this policy, and the process that was used to develop the policy. Chapter two highlights the role of tourism in Kenya, including the role in the economy and the recent performance by the sector.

Chapter three presents the problematic relating to the country's tourism, including the missed opportunity and key constraints. Chapter four presents the contexts for resetting our tourism, including why Kenya needs to prioritize tourism and the value in making our tourism responsible.

Chapter five highlights the vision for this policy, the objectives, guiding principles, critical success factors, and specific targets. Chapter six presents the policy statements toward igniting the engine for resilient and sustainable tourism in the country.

Chapter seven presents the legal and institutional framework underpinning this policy. Chapter eight highlights the linkages that tourism will have with other sectors, while chapter nine presents the actions that will entail implementation of this policy.

It is our sincere hope that this policy will aptly inform and guide the comprehensive review of the tourism legislation and innovation and change in the way we manage and articulate our tourism.

MR. JOSEPH K. BOINNET, MGH, nsc (AU)
CHIEF ADMINISTRATIVE SECRETARY

ACKNOWLEDGMENTS

This policy has been developed through a participatory process that involved different tourism stakeholders. The process sought to enlist the views of as broad level of state and non-state actors as possible, both individual and corporate, in line with the Constitution of Kenya, 2010.

We recognize and appreciate the views presented by the many individuals and institutions, from the private sector, the academia, civil society, government (national and county) agencies, etc. that contributed to the formulation of the policy. The views were well received, synthesized, reviewed, and incorporated in this policy.

We also acknowledge the people of Kenya, particularly actors at the grassroots-level, for the enlightening engagements during the public consultations held as part of the process of preparing this policy. We are indebted to you for the lessons on resilience and sustainability that you shared with us, which form the backbone of this policy.

We also had meetings that combed through and reviewed the policy directions that were emerging throughout the policy formulation process. These meetings involved actors in the tourism private sector and other non-state actors. The reviews and observations raised during these meetings sharpened this document further and made it to truly capture the aspirations of actors in Kenyan tourism.

The steering committee that facilitated the collection and collation of views into this policy documents is gratefully appreciated. We also acknowledge the professional work that was done by external drafters, editors, and typesetters.

HON. SAFINA KWEKWE TSUNGU, CBS
PRINCIPAL SECRETARY, STATE DEPARTMENT FOR TOURISM

TABLE OF CONTENTS

Table of Contents

FOREWORD	I
PREFACE	III
ACKNOWLEDGMENTS	IV
TABLE OF CONTENTS	V
ABBREVIATIONS AND ACRONYMS	VII
GLOSSARY	VIII
CHAPTER ONE	1
INTRODUCTION	1
1.1 BACKGROUND	1
1.2 RATIONALE FOR A NEW TOURISM POLICY	2
1.3 THE PROCESS USED TO FORMULATE THIS POLICY	3
CHAPTER TWO	4
ROLE OF TOURISM IN KENYA	4
2.1 KENYA'S TOURISM POTENTIAL	4
2.2 ROLE IN THE ECONOMY	5
2.3 PERFORMANCE OF TOURISM SECTOR	5
CHAPTER THREE	7
THE CHALLENGE	7
3.1 KENYA'S UNREALISED POTENTIAL	7
3.2 KEY CONSTRAINTS	7
CHAPTER FOUR	11
4.0. RESETTING KENYA TOURISM	11
4.1 TOURISM AND THE KENYA VISION 2030	11
4.2 RESETTING OUR TOURISM	11
CHAPTER FIVE	12
5 VISION, GOAL OBJECTIVES, AND GUIDING PRINCIPLES	12
5.1 VISION	12
5.2 GOAL 12	
5.3 OBJECTIVES	12
5.4 GUIDING PRINCIPLES	12
CHAPTER SIX	14
6 RESETTING AND REIGNITING KENYA TOURISM	14
6.1 UNLOCKING THE TOURISM POTENTIAL IN THE "NEW NORMAL"	14
6.2 RESETTING OUR TOURISM	14
6.2 TOURISM PRODUCTS AND SERVICES	14
6.3 <i>Culture and Heritage Tourism</i>	15
6.4 <i>The African Safari</i>	16
6.5 <i>Beach Tourism</i>	16
6.7 <i>Nature Tourism</i>	16
6.8 <i>Scenic Tourism</i>	17
6.9 CITY/ URBAN TOURISM	17
6.10 <i>Adventure Tourism</i>	17
6.11 <i>Sports Tourism</i>	18
6.12 <i>Health and Wellness Tourism</i>	18
6.13 <i>Elderly Care Tourism</i>	18

6.14	<i>Desert Tourism</i>	19
6.15	19	
	INFRASTRUCTURE	19
6.15.1	<i>Roads</i>	19
6.15.2	<i>Air</i> 20	
6.15.3	<i>Railway and Port Services</i>	21
6.15.4	<i>Communication and ICT</i>	21
6.15.5	<i>Water and Electricity</i>	22
6.15.6	<i>Health, Safety and Security</i>	22
6.15.7	<i>Tourism Circuits</i>	23
6.16	TOURISM PROMOTION AND MARKETING	23
6.16.1	<i>International Tourism</i>	24
6.16.2	<i>Regional tourism</i>	24
6.16.3	<i>Domestic Tourism</i>	25
6.17	TOURISM INVESTMENTS	25
6.18	TOURISM ETHICS, QUALITY AND STANDARDS	26
6.18.1	26	
	<i>Tourism Ethics</i>	26
6.18.2	<i>Tourism Quality and Standards</i>	26
	TOURISM HUMAN RESOURCE DEVELOPMENT AND TRAINING	27
6.19	27	
6.20	TOURISM RESEARCH AND KNOWLEDGE MANAGEMENT	28
6.21	TOURISM PRICING	28
6.22	FUNDING AND RESOURCE MOBILIZATION FOR TOURISM DEVELOPMENT	29
6.23	TOURISM INTERNATIONAL COOPERATION	30
6.24	COUNTY TOURISM DEVELOPMENT	30
	CHAPTER SEVEN	31
7.0.	LEGAL AND INSTITUTIONAL FRAMEWORK	31
7.1.	LEGAL FRAMEWORK	31
7.2.	INSTITUTIONAL FRAMEWORK	31
	CHAPTER EIGHT	32
8.0.	LINKAGES WITH OTHER SECTORS	32
8.1.	LINKAGES WITH OTHER SECTORS	32
8.2.	PARTNERSHIPS AND STAKEHOLDER INVOLVEMENT	33
8.3.	TOURISM EDUCATION AND PUBLIC AWARENESS	33
	CHAPTER NINE	34
9.0	IMPLEMENTATION STRATEGIES AND ACTIONS	34
9.1	INTEGRATION OF TOURISM CONCERNS IN SECTORAL POLICIES, DEVELOPMENT PLANNING AND BUDGETARY PROCESSES	34
9.2	AMENDMENTS TO THE TOURISM ACT, 2011	34
9.3	CLARIFYING ROLES AND RESPONSIBILITIES	34

ABBREVIATIONS AND ACRONYMS

COVID-19	Coronavirus Disease of 2019
DFI	Development Financial Institution
EATC	East African Tourism Council
EEMS	Economic, Environmental, and Social Management Systems
EIA	Environmental Impact Assessment
FDI	Foreign Direct Investment
GDP	Gross Domestic Product
IATA	International Association of Transport Associations
ICAO	International Civil Aviation Organization
ICMT	Intra-Common Market Tourism
KICC	Kenyatta International Conventions Centre
KTB	Kenya Tourism Board
KUC	Kenya Utalii College
KWS	Kenya Wildlife Service
LVICC	Lake Victoria International Conventions Centre
MICC	Mombasa International Conventions Centre
MICE	Meetings, Incentives, Conventions, and Exhibitions
NAICEC	Nairobi International Conventions and Exhibitions Centre
NEMA	National Environment Management Authority
NTC	National Tourism Council
RNUC	Ronald Ngala Utalii College
RTCs	Regional Tourism Councils
SDGs	Sustainable Development Goals
SEA	Strategic Environmental Assessment
SGR	Standard Gauge Railway
SMMEs	Small, Medium, and Micro-Enterprises
SWAP	Sector-Wise Approach
TIAC	Inter-Agency Tourism Council
TF	Tourism Fund
TFC	Tourism Finance Corporation
TMCs	Tourism Management Companies
TRI	Tourism Research Institute
TSVs	Tourism Service Vehicles
UFTAA	Universal Federation of Travel Agents Association
USPs	Unique Selling Points
UNWTO	United Nations World Tourism Organization
VAT	Value Added Tax
WTTC	World Tourism and Travel Council

GLOSSARY

“cultural tourism” refers to cultural aspects of tourism that are of interest to the visitor and can be marketed as such, including the customs and traditions of people, their heritage, history, and way of life.

“ecotourism” refers to responsible travel to natural areas that conserves the environment and improves the well-being of local people.

“responsible tourism” refers to tourism that promotes responsibility to the environment through its sustainable use, the responsibility to involve local communities in the tourism industry, the responsibility for the safety and security of visitors, and the responsible government, employees, employers, unions, and local communities.

“sustainable tourism” refers to tourism activity that optimizes the economic and other societal benefits available in the present without jeopardizing the potential for similar benefits in the future. This means that tourism development meets the needs of present tourists and hosts while protecting and enhancing opportunity for the future.

“tourism” refers to all travel, for whatever purpose, which results in one or more nights being spent away from home.

“tourism industry” refers to all recipients of direct spend incurred by tourists, including pre-trip expenditure on travel and booking, travel and en-route expenditure, and all spending at the destination.

“tourist” refers to a person who travels away from home, staying away for at least one night. A tourist can be a domestic tourism (for example a resident of one part of the country staying for at least one night in another part of the country; a regional tourism (a visitor from any African country spending one or more nights in any part of Kenya); or an overseas tourist (a resident of an overseas country staying one or more nights in any part of Kenya). A tourist travels for different purposes, including business, leisure, conference, and incentive.

CHAPTER ONE

INTRODUCTION

1.1 Background

- 1.1.1 Tourism is one of the major generators of income for developing countries. It has direct, indirect, and induced benefits to economies and, its multiplier effects and overall contribution to country's Gross Domestic Product (GDP) and employment creation.
- 1.1.2 In 2019, the World Tourism and Travel Council (WTTC) estimated tourism's direct, indirect, and induced impacts to account for 10.3% of the global GDP (US\$6.9 trillion), 330 million jobs (1 in 11 jobs worldwide and with twice as many international tourist arrivals in developing countries as in developed ones), and US\$946 billion worth of capital investments.
- 1.1.3 One of the targets of Goal 8 of the Sustainable Development Goals (SDGs) is that "By 2030, devise and implement policies to promote sustainable tourism that creates jobs and promotes local culture and products." Tourism has potential to create jobs in areas where job opportunities are otherwise scarce. This is when it grows in popularity in nature and rural areas.
- 1.1.4 The Government recognizes that tourism is important in the realization of its agenda, and that the sector is dynamic and requires constant innovation that initiates and responds to changes that impact on it.
- 1.1.5 Accordingly, the first ever statement of the country's National Tourism Policy was set out in Sessional Paper No. 8 of 1969. The policy established growth targets for the industry and further spelt out strategies on the role of Government while encouraging participation of the private sector in tourism development.
- 1.1.6 The Kenya Vision 2030 prioritizes tourism as one of the top eight sectors with the potential to spur double-digit economic growth and development. The sector is estimated to account for about 10% of the country's GDP and 9% total employment. The tourism sector is also a leading foreign exchange earner for Kenya. According to the Economic Survey Report of 2020, the country generated Kshs. 163.6 billion from tourism receipts in 2019, which accounted for about 13.1% of total export of goods and services.
- 1.1.7 Sessional Paper No. 1 of 2010 on Enhancing Sustainable Tourism was enacted in 2010, to provide policy direction for the development of sustainable tourism throughout the country; mainstream tourism-related issues into the national development planning, budgeting, and decision-making processes; harmonize conflicting policies in key sectors like environment, forestry, wildlife, water, fisheries, agriculture, and infrastructure with the tourism policy so as to enhance cross- and inter-sectoral linkages; provide a framework for public-private

partnerships in the tourism sector with a view to attracting investments; enhance community participation in tourism activities; improve the quality and breadth of the country's tourism offerings, including at the coast, in game parks, heritage, culture, sports, adventure, ecotourism, rural and agro-tourism, health, and expansion in conference tourism; promote and encourage domestic and regional tourism; and create an environment to make Kenya a premier tourism destination where tourists spend more per visit.

- 1.1.8 In 2015, following the shocks in the country's tourism that were enflamed by safety and security concerns arising from terrorist attacks, outbreak of Ebola in West Africa, and the issuance of travel advisories by countries that are key source markets for Kenyan tourism, the government established a National Taskforce on Tourism Recovery comprising of industry stakeholders to assess the landscape and recommend actions to take to improve tourism in the country.
- 1.1.9 Since 2016, the Government has been implementing the recommendations of the Taskforce, as well as executing the country's long-term strategy – the National Tourism Blueprint 2030 (NTB2030). These efforts triggered growth in the country's tourism, with foreign tourist arrivals reaching 2.03 million in 2018 and 2.05 million in 2019. Tourism earnings, in tandem, grew by 31.3%, in 2018, to reach Kshs. 157.4 billion. The earnings reached Kshs. 163.6 billion in 2019. Besides the growth in foreign tourism numbers, bed nights by Kenyans also grew from 3.50 million in 2016 to 4.82 million in 2019.
- 1.1.10 In 2020, Kenyan tourism was dealt a huge blow by the worst health crisis in a century, the Coronavirus Pandemic. The pandemic wiped the gains that had been made in tourism numbers up to the year 2019. The need to explore ways of making the destination more resilient when faced with crises of a similar nature, while ensuring sustainability of our tourism became overarching.

1.2 Rationale for a New Tourism Policy

- 1.2.1 Several significant changes occurred since the enactment of Sessional Paper No. 1 of 2010. While important achievements were made under the policy, the dynamics that global realities and trends present to tourism made the policy inadequately robust for dealing with the challenges and emerging realities.
- 1.2.2 A new tourism policy was imperative due to the following: -
 - 1.2.2.1 The promulgation of the Constitution of Kenya, 2010, which brought about a new constitutional dispensation with a different architecture of governance and shared responsibility for tourism between the National and County Governments;
 - 1.2.2.2 New instruments that guide the tourism sector, e.g., the National Tourism Blueprint 2030, the Executive Order No. 1 of May 2020, Recommendations of the Presidential Taskforce on Parastatal Reforms, among others, which necessitate informed realignment of the tourism sector vis-à-vis other sectors of the economy toward effective management of the destination;

- 1.2.2.3 Threats to the country's tourism sector due to health crises like COVID-19, politics, technology, economics, safety and security, social dynamics, and environment-related issues;
 - 1.2.2.4 The multi-sectoral and multi-dimensional nature of tourism, which calls for informed clarification of roles and responsibilities of various actors and stakeholders so as to eliminate duplicity in mandates and the operations of institutions; and
 - 1.2.2.5 The act that tourism has become a fiercely competitive business, hence, for tourism destinations, competitive advantage is no longer natural and business-as-usual, but increasingly man-made – driven by science, technology, information, and innovation. As such, our stock of natural resources will not simply determine our competitiveness, but rather, how the resources are managed and authentic experiences innovatively developed, branded, and marketed to complement them.
- 1.2.3 This policy provides the framework and guidelines for tourism development in Kenya. It is underpinned by five strategic themes, namely, Tourism Product, Tourism Infrastructure, Tourism investment, Tourism Marketing, Innovation and Change, and Research and Knowledge Management. It will be followed by an implementation strategy that will contain the key actions necessary to its effective implementation.
- 1.2.4 Implementation of the policy will be guided by targets that will be developed, from time to time, for foreign tourism, domestic tourism, tourism's contribution to job creation, tourism investment, visitor satisfaction, tourism awareness, community participation, brand and marketing, spread of tourism benefits, tourism events, responsible tourism, and multi-stakeholder processes.
- 1.2.5 The policy also prioritizes effective development of the country's tourism human resource, as well as informed institutional re-organization (including of budgets and regulations), and effectual planning for its implementation.

1.3 The Process Used to Formulate this Policy

- 1.3.1 This policy resulted from an elaborate, inclusive, and participatory process that included the following: -
- (i) Extensive review of literature, including and/or relating past and existing policies, legislations, and regulations affecting and/or affected by Kenyan tourism;
 - (ii) Review of literature on good practices in top tourism destinations globally, regionally, and locally; and
 - (iii) Broad public participation through consultative workshops, strategic one-on-one consultations with key industry stakeholders, focus group discussions, key informant interviews and expert opinions, and written submissions and memoranda.

CHAPTER TWO

ROLE OF TOURISM IN KENYA

2.1 Kenya's Tourism Potential

- 2.1.1 With a population of approximately 52 million and a land area of 580,367 square kilometers, Kenya's resource base for tourism is incredible. The country's attractiveness lies in its diversity in cultures, landscapes, weather, ways of life, etc.
- 2.1.2 Some of the features that make Kenya an incredibly attractive tourism destination include accessible and diverse wildlife (over 1,100 bird species and over 350 mammal species – over 13 of the birds species and over 20 of the mammal species being endemic; over 7,004 plant species, 260 of which cannot be found anywhere else in the world; over 25,000 insect species; over 224 fresh water fish, more than 25 of which are endemic; over 220 reptile species, more than 47 of which are endemic; over 297 species of molluscs), diverse cultures (particularly the traditional African cultures), varied and impressive scenery, virgin wilderness areas, generally sunny and warm climate, no 'jet lag' from Europe, a well-developed infrastructure, and unlimited opportunities for such special interest activities as whale-watching, wild water rafting, hiking, bird-watching, bush survival, deep-sea fishing, hunting, and diving.
- 2.1.3 In addition, the country is home to unique and historic archaeological sites like the Cradle of Mankind; the availability of excellent conference and exhibition facilities; a wide range of sporting facilities; good internet, communication, and medical services; internationally acclaimed attractions like Wildebeest Migration, and the warm and welcoming nature of the people of Kenya make the country an almost self-contained tourist destination.
- 2.1.4 Tourism has become a fiercely competitive business. For Kenya, as is with other tourism destinations world over, competitive advantage is no longer natural. It will have to increasingly take a man-made approach – driven by science, technology, information, and innovation. This means that it is not simply the stock of natural resources that the country has that will determine her competitiveness in tourism, but rather, how those resources are managed and to what extent they are complemented with man-made innovations.
- 2.1.5 In terms of man-made innovations, Kenya scores very well on three fronts – first, the already well-established network of national parks and game reserves (covering some 11.7% territorial protected areas, 11.0% conservancies, and 0.64% marine protected areas) and private nature reserves that are 'on trend' with the demands of the increasingly environmentally sensitive visitor. Second, many Kenyan tourism enterprises are already leaders in global 'best practice' in ecotourism which boosts the country's image internationally. Third, the political transformation in Kenya that seeks to protect the economy and tourism from effects of election cycles.

2.1.6 The country's tourism potential is reflected in the fact that despite the health crisis caused by the global outbreak of the Coronavirus Pandemic and the far-reaching impacts that the crisis caused on tourism and travel in 2020, Kenya was voted as the leading tourism destination in Africa by WTTC.

2.1.7 Notwithstanding all the above-mentioned advantages, Kenya has not been able to realize its full potential in tourism. The contribution of tourism to GDP, employment, small business development, income and foreign exchange earnings, and distribution of income to the lowest level of society, among others, has remained limited.

2.2 Role in the Economy

2.2.1 Tourism is a key foreign exchange earner for Kenya (it generated Kshs. 163.6 billion tourism receipts in 2019, accounting for about 13.1% total exports of goods and services), and third largest contributor to GDP after agriculture and manufacturing. In 2020, its contribution to the country's GDP was USD 9 billion, compared to about USD 1.3 billion in 2001. The sector contributes about 12% to the country's total employment, has over 20 times multiplier effect on government resources invested in the sector, and fosters national cohesion and integration.

2.2.2 The potential for Kenya to grow its tourism industry to triple its contribution to national income and job creation, and double its foreign exchange earnings by 2030 is very real. If the actions envisaged in this policy are effectively implemented, Kenya will attract over 26 million domestic tourists and over 4 million overseas tourists annually by 2030, which will translate to over Kshs. 1.14 trillion direct spend and 3 million jobs created/maintained in the sector.

2.3 Performance of Tourism Sector

2.3.1 The performance of Kenya tourism had been on an upward trend since 2016. This momentum in growth was sustained through to the end of the year 2019, with tourist arrivals reaching 1.8 million in 2011 and crossing the 2 million mark to reach 2.03 million in 2018 and 2.05 million in 2019. Tourism earnings, in tandem, grew by 31.3% in 2018 to hit Kshs. 157.4 billion and reached Kshs. 163.6 billion in 2019. Bed nights by Kenyans grew steadily from 3.5 million in 2016 to 4.82 million in 2019.

2.1.8 Over the years, Kenya's tourism industry has been impacted by a number of crises, including the Severe Acute Respiratory Syndrome (SARS) outbreak in 2003, the global economic crisis of 2008/09, and the Middle East Respiratory Syndrome (MERS) outbreak in 2015. While these did not lead to long-term decline in the global development of tourism in terms of tourist arrivals, the outbreak of the Coronavirus Pandemic in 2020 brought global tourism to a grinding halt. Countries restricted movement within their borders and suspended travel into and out of their borders. Just as in other tourism destinations, tourism in Kenya was hard hit –

tourism establishments closed business, earnings from tourism plummeted, and many jobs were lost in the sector.

- 2.3.2 The Coronavirus Pandemic reset global tourism, with important lessons regarding the need to enhance the resilience and sustainability of tourism systems. Of importance, given that non-pharmaceutical interventions are highly acclaimed, will be for destinations to re-imagine their safety and security, the hygiene standards of tourism facilities and services, and innovation in restarting the tourism enterprise. Besides the Coronavirus Pandemic, Kenya like other tourism destinations has to think through ways of remaining resilient and sustainable in the face of other ongoing disasters that could be potentially more devastating than the Coronavirus Pandemic, e.g., climate change. Forward thinking and innovation in the country's tourism development and management, as well as enhanced ability to initiate and respond to change revolving around the triple bottom line will be critical.
- 2.3.3 Domestic tourism will be an ideal starting point for re-igniting Kenyan tourism after the grinding to a halt by COVID-19. The sub-sector has immense potential to cushion the country's tourism sector from external shocks. This calls for the harmonization of the tourism pricing system that makes overseas and domestic tourists pay different rates for the same set of services.
- 2.3.4 The potential for Kenya to increase arrivals and spend from overseas, regional, and domestic tourists remains substantial, considering that the majority of previously neglected groups in Kenya have not been encouraged to travel and experience their country and that many tourists from Africa are increasingly coming to Kenya, which presents a good potential for the segment's further development.

CHAPTER THREE THE CHALLENGE

3.1 Kenya's Unrealised Potential

- 3.1.1 Visitors to and friends of Kenya are always amazed and awed by the stunning and unique tourism offerings Kenya has. Even Kenyan tourism stakeholders agree that Kenya has always operated far below its tourism potential. Tourism development in Kenya has the great potential not only to more than triple the current numbers of tourists, but also reshape its positive economic impact on the tourism businesses, workers and communities as well as make significant contribution to the GDP of the country. The tourism industry in Kenya has been shy to grow, scary of competition, stuck on post-independence glory and disjointed in facing challenges.
- 3.1.2 Tourism, more than any other sector, has the potential to achieve the objective of empowering grassroots communities and strengthening national cohesion and integration. Kenya has had a head start in tourism from its independence. The government led by providing tourism product infrastructure and invested in the training of hospitality industry personnel. Kenya's hospitality workers are renowned for their professionalism and quality service and they are found across the continent and abroad.
- 3.1.3 Kenya's tourism has developed markedly in the last five decades. In the traditional tourist regions, communities and small businesses have grown in capacity, understanding and skills to hosts both domestic and foreign tourists.
- 3.1.4 Kenya is regional leaders and occupies a pole position in Africa and globally. It has been at the forefront of cutting edge digital development with MPESA being a world first, as well as hosting leading digital hubs in Nairobi and other cities. Kenya is also a home to the United Nation Office in Nairobi, hosts the UNEP and UN Habitat, with a constant flow of top global leaders.

3.2 Key Constraints

A number of factors limit the effectiveness of Kenya's tourism industry to play a more meaningful role in the national economy. Some of the constraints are: -

Product diversity and innovation: Kenya's safari and beach products have not been innovative in tandem with changing consumer needs and trends. Wildlife tourism in Kenya is currently concentrated in only 7 parks, which receive 80 per cent of the total number of visitors. There is therefore great potential in targeting the under-visited parks and reserves. In addition, only 18 per cent of Kenyan hotels are 4-5 star categories, which is significantly lower than the average 40 per cent in competing long-haul destinations. To increase competitiveness, there

is need to expand the product choice and innovation, improve and diversify on quality of facilities and services; and address the unexploited and underdeveloped products.

Inadequate hotel and bed capacity: Whereas there is an increase in visitor arrivals, the bed occupancy levels during the peak season are at close to full capacity at the various customer target levels and the reverse occurs during the low season. As a result, the country has to grapple with the rapid growth in demand, principally due to limited investment in tourist accommodation.

The available bed capacity is not well distributed throughout the country since most of them are concentrated in Nairobi, Coast and South Rift. Other regions geographically lack quality accommodation for touristic purposes.

It is imperative to create an enabling investment environment in hospitality and accommodation in order to meet the ever-increasing demand for Kenya's tourism products.

Low standards and quality assurance in the Sector: The 2030 Tourism Blueprint notes that one of the factors that have contributed to under-performance of the tourism sector is that much of the accommodation facilities (especially beach resorts and lodges) are tired and require upgrade. It is therefore critical to enhance compliance to minimum standards by regulated tourism enterprises, activities and services to re-engineer destination appeal and competitiveness.

Inadequate infrastructure: Despite the improvement in the state of infrastructure, there is need for further investment particularly in roads, railways, waterways, airports, airfields and telecommunications as well as aesthetic development of Kenya's urban cities.

Uncoordinated Marketing: Marketing Kenya's tourism product and services is critical in enhancing sustainable tourism development. This calls for integrated and coordinated approach to marketing of Kenya as a preferred tourist destination.

Negative Publicity: Violence & terrorism attract significant coverage in both local and international media. However, this coverage has given unbalanced reporting of insecurity incidences without highlighting the positive developments happening in Kenya. This has exacerbated the negative publicity on Kenya as a tourist destination thereby deterring interest in the destination from both tourists and tourism service suppliers.

Disjointed and Non Dynamic Private Sector: Tourism is a global business operating in a fiercely competitive landscape. The role of tourism trade is critical in ensuring that tourists are easily attracted to and identify with their products and services, and thereafter they enjoy an experience that they will wish to relive and others to enjoy. This calls for dynamism in planning, an outlook with 360% view, unending experience renewal, sensitivity to the environment and customer needs and pro-active engagement with hosting communities. It also calls for the industry to organise and work together for common benefit. Kenya's private sector has been slow, shy, disjointed in approach, laid back and unwarrantingly expecting leadership and drive from government.

Inadequate safety and security: Kenya suffers from the challenge of perceived insecurity as compared with other tourism destinations like France, Egypt, South Africa and Israel. In the past, the country's tourism sector has suffered from incidents of insecurity. These have resulted in issuance of travel advisories against Kenya by key source markets.

To address this, the National Police Service needs to be strengthened to support the tourism sector in addition to operationalise the Tourism Protection Service.

Climate change: Globally, the climate is changing which results in direct impacts on the environment. Adverse impacts arising from changes in climate are already being observed as evidenced by vanishing glaciers on Mt. Kenya and Kilimanjaro, rise in water levels, loss of biodiversity, among others. People and the environment are increasingly suffering from the effects of natural disasters such as floods, landslides and prolonged droughts. There is therefore need to enhance adherence to sustainable tourism development principles to mitigate the issues of climate change.

Funding challenges: Development of tourism products and facilities are capital intensive that requires sustainable funding mechanism to ensure projects are successfully implemented. In addition, standards development and implementation; and marketing of destination Kenya is affected by insufficient budgetary allocations and support.

Multiple Licensing Regimes: Most of the stakeholders have complained of high cost of doing business due to numerous licenses required to operate. These include tourism license, Single Business permit, Liquor license, National Environment Management Authority (NEMA) License, garbage collection fee, music copyright, catering levy and bed levy among others. There exists positive correlation between high cost of doing business and destination pricing thus explaining why Kenya is regarded as an expensive destination.

Uncoordinated Inter - Governmental Collaboration: The existing national legislations do not adequately cater for the needs of the devolved governments. This has led to duplication of legislation, regulation and functionality by County Governments which needs to be harmonized.

Human capital development. Tourism is a labour intensive industry and requires workforce with the right training. The training structure is not in tandem with the market needs. To address this, there is need to align the training regime with the current market.

CHAPTER FOUR

4.0. RESETTING KENYA TOURISM

4.1 Tourism and the Kenya Vision 2030

- 4.1.1 The Kenya Vision 2030 seeks to transform Kenya into a newly industrializing middle-income country providing a high quality of life to all its citizens in a clean and secure environment. The programme stands out as one of the key solutions of making a leap from poverty to widely shared prosperity and equity in the country.
- 4.1.2 COVID-19 presented a break to the delivery of Vision 2030 plans in 2020, including on the country's tourism. However, the pandemic provided an opportunity for reflection and resetting. The opportunity enables the sector to re-imagine the role of tourism in the country, particularly its contribution to making a leap from poverty to widely shared prosperity and equity in the country.
- 4.1.3 Prioritizing tourism in the new normal occasioned by COVID-19 will ensure that Vision 2030's aim of delivering shared prosperity and equity in the country is sustained. This is because the sector allows wealth to be injected into communities in a variety of ways.
- 4.1.4 Tourism brings significant foreign exchange to the country and has always been amongst the top three foreign exchange earners. *generator par excellence*. A re-invigorated tourism industry has a great potential to significantly grow the country's foreign exchange reserves.
- 4.1.5 Given the foregoing benefits of tourism to an economy, resetting the Kenyan tourism sector provides a unique basis for the sustenance of the Vision 2030 results on making a leap from poverty to widely shared prosperity and equity in the country.

4.2 Resetting Our Tourism

To achieve the true potential of the Kenyan tourism industry after the grinding to a halt due to the COVID-19 Pandemic, it must be made clear that old tourism will not work. Resetting our tourism to take cognizance of the COVID-19 triggered new normal is required. This includes forward thinking and innovation by the industry to boost other sectors of the economy and create entrepreneurial opportunities for all Kenyan communities, be environment conscious, promote peaceful co-existence, and deliver prosperity to all Kenyans.

CHAPTER FIVE

5 VISION, GOAL OBJECTIVES, AND GUIDING PRINCIPLES

5.1 Vision

A preferred destination in sustainable tourism development

5.2 Goal

To align tourism sector aspirations to the changes in the operating environment thus provide a framework to enhance resilience and sustainability.

5.3 Objectives

The objectives of this Policy are to:

- (a) Provide a framework for integration of tourism sector considerations into the various sectoral policies, National and County development planning as well as decision making processes.
- (b) Transform and strengthen the legal and institutional framework for effective coordination and management of the tourism sector.
- (c) Ensure sustainable tourism that enhances economic development, environmental sustainability and encourage community participation to ensure benefit trickle down to host communities.
- (d) Encourage sustainable resource mobilization and management for tourism development
- (e) Promote and support the provision of incentives and other economic instruments that enhance investment in the sector.
- (f) Promote and enhance collaboration, cooperation, synergy, partnerships and participation in the tourism sector by all the stakeholders.
- (g) Promote and encourage innovation and uptake of modern technology in the sector.
- (h) Ensure development of high quality standards and services in the tourism industry.

5.4 Guiding Principles

The following guiding principles will underpin this Policy:

- (a) **Good Governance:** the sector will be managed transparently in accordance with principles of good governance.

- (b) **Value for Visitors:** Tourism will be undertaken in a manner that provides value for money, excellence, convenience and quality service to the visitors.
- (c) **Sustainability:** Given that tourism in Kenya is nature based, tourism will be undertaken in a manner that does not compromise the quality and value of the resource, or exceed the carrying capacity of supporting ecosystems. It will be managed in a sustainable way by incorporating long term goals in its planning and operations to ensure that it survives turbulence that faces the sector.
- (d) **Community participation:** Given that tourism products are found in and hosted by local communities focus will be on involving all stakeholders such as national, county governments, tourism operators and host communities in its management, planning, benefit sharing to achieve sustainability.
- (e) **Effective Compliance:** Proper enforcement mechanisms with distinct powers and mandates will be prescribed to responsible agencies to ensure that all necessary laws and mechanisms are enforced accordingly and that all players fully comply and adhere to the set rules and laws to ensure sustainability.
- (f) **Benefits:** tourism is an economic and social development tool and must take into account the benefits to the host communities, visitors and investors.
- (g) **The principle of subsidiarity:** tourism management will be undertaken through decentralization and devolution of authority and responsibilities at the lowest level possible.
- (h) **Capacity building:** community involvement, participation and collaboration with stakeholders should be continually encouraged to enhance local capacity.
- (i) **International cooperation:** bilateral agreements as well as regional and multilateral instruments should be domesticated and implemented.
- (j) **The Precautionary Principle:** Where there are credible threats of serious or irreversible damage by tourism, lack of full scientific certainty will not be used as a reason for postponing cost-effective measures to prevent damage.
- (k) **The Polluter and User Pays Principle:** The polluter and users of natural heritage should bear the full environmental and social costs of their activities.
- (l) **Private Sector Driven:** Tourism should be driven by the private sector with the government providing facilitative environment and ensuring standards are upheld, tourist protected and communities benefitting.

CHAPTER SIX

6 RESETTling AND REIGNITING KENYA TOURISM

6.1 Unlocking the Tourism Potential in the “New Normal”

- 6.1.1 The Kenya Vision 2030 seeks to transform Kenya into a newly industrializing middle-income country providing a high quality of life to all its citizens in a clean and secure environment. The programme stands out as one of the key solutions of making a leap from poverty to widely shared prosperity and equity in the country.
- 6.1.2 COVID-19 presented a break to the delivery of Vision 2030 plans in 2020, including on the country’s tourism. However, the pandemic provided an opportunity for reflection and resetting. The opportunity enables the sector to re-imagine the role of tourism in the country, particularly its contribution to making a leap from poverty to widely shared prosperity and equity in the country.
- 6.1.3 Prioritizing tourism in the new normal occasioned by COVID-19 will ensure that Vision 2030’s aim of delivering shared prosperity and equity in the country is sustained. This is because the sector allows wealth to be injected into communities in a variety of ways.
- 6.1.4 Tourism brings significant foreign exchange to the country and has always been amongst the top three foreign exchange earners. *generator par excellence*. A re-invigorated tourism industry has a great potential to significantly grow the country’s foreign exchange reserves.
- 6.1.5 Given the foregoing benefits of tourism to an economy, resetting the Kenyan tourism sector provides a unique basis for the sustenance of the Vision 2030 results on making a leap from poverty to widely shared prosperity and equity in the country.

6.2 Resetting Our Tourism

To achieve the true potential of the Kenyan tourism industry after the grinding to a halt due to the COVID-19 Pandemic, it must be made clear that old tourism will not work. Resetting our tourism to take cognizance of the COVID-19 triggered new normal is required. This includes forward thinking and innovation by the industry to boost other sectors of the economy and create entrepreneurial opportunities for all Kenyan communities, be environment conscious, promote peaceful co-existence, and deliver prosperity to all Kenyans.

6.2 Tourism Products and Services

Kenya has traditionally been regarded and developed as a beach, wildlife safari and to a limited extent a business tourism destination. While these are likely to remain her core

products and services, it will be prudent to diversify to other tourism products and services including sports, culture and heritage, adventure among others.

A range of eco-tourism and community-based tourism initiatives should form part of a diversified and enhanced tourism product, including home stays and agro-tourism. Potential also exists for spreading tourism to new areas away from the most-visited and at times crowded destinations. In addition, Nairobi, as the commercial centre for East and Central Africa with superior facilities, and other centres are well positioned to attract the business travel market, meetings, incentives, conferences, exhibitions, cuisine, shopping and entertainment. There are also opportunities for further development and promotion of local arts and crafts among others.

To ensure provision of high quality tourism products and services, the National Government and County Government in collaboration with other stakeholders will endeavour to:

- 1. Diversify, develop and implement tourism products that enhance economic growth, environmental sustainability and preserve heritage.*
- 2. Develop authentic innovative tourism products, services and experiences.*
- 3. Ensure high quality standards of tourism products and services.*
- 4. Support establishment of zoning and carrying capacities for each tourism area.*
- 5. Provide incentives for investment in tourism products and services.*
- 6. Develop supportive infrastructure to ensure tourism products can be accessed by the market.*
- 7. Adopt and benchmark with global innovative approaches in development of new tourism products and services*
- 8. Enhance the uptake of MICE tourism countrywide*

6.3 Culture and Heritage Tourism

Culture and heritage is a key pillar of development and sustenance of communities. A dynamic cultural sector is prerequisite for a well-functioning public sphere with arenas for critical debate and exchange of ideas. It has a positive influence on the social development of any given country and, gives authenticity to our tourism experiences. Maintaining a connection with the unique character of our historic and national environment, with the language, the music, the arts, the cuisines, and the literature, which accompanied us throughout our life, is fundamental for our unity because it provides us with a sense of who we are.

To ensure growth of high quality cultural heritage tourism products and experiences, the National Government and County Government in collaboration with other stakeholders will endeavour to:

- 1. Establish frameworks to safeguard, promote and package cultural heritage from the diverse Kenyan communities and put in place mechanisms to ensure*

that culture and heritage is integrated in all tourism products and experiences so as to make them authentic.

2. *Develop and implement cultural heritage tourism strategy.*

6.4 The African Safari

The African Safari originates from Kenya and Kenya is the home for the African Safari where the authentic experience resides. It is the backbone for the tourism sector's leading role in contribution to the country's balance of payments.

The government will endeavour to ensure the following:

1. Maasai Mara, Amboseli, Tsavo, tourism areas will be encouraged to develop and implement resilient and sustainable tourism area plans.
2. Mt. Kenya-Meru-Samburu Tourism Circuit, the Tsavo-Shimba Tourism Circuit, and the Amboseli-Nairobi-Nakuru Tourism Circuit will be encouraged to develop and implement resilient and sustainable plans.
3. Frameworks to fix, refresh, and revamp all African Safari tourism products and services will be established and strengthened.

6.5 Beach Tourism

Kenyan beach destination tourism bears the footprints for Kenya's tourism for domestic, regional and international visitors. This is evidenced by the large number of tourists during the peak period. The beach and marine resources are able to accommodate as many tourists as are available. They are, therefore, our unique opportunity to increase tourism numbers without infringing our regard for responsible tourism/sustainability.

The government will endeavour to ensure the following:

1. Frameworks to strengthen beach nodes for resilient and sustainable tourism will be developed and implemented.
2. Strategic beach waterfronts will be developed/improved.
3. The traders within the beach destinations are encouraged to establish common vehicles for joint branding and marketing, effective efficient management of resources and pulling together viable common operations.

6.7 Nature Tourism

Many foreign and domestic tourists are experiential and interested in the diversity of natural resources. They want what is real, and want to be immersed in a rich natural experience. Nature-based tourism depends on conserved habitats and, fosters local-level empowerment.

The following policy guidelines shall apply: -

1. Counties will be encouraged and supported to conserve their habitats and to empower local communities to maintain them for tourism development.

2. Counties will be encouraged to develop infrastructure leading to and around nature tourism products.
3. Mechanisms will be put in place to profile and promote iconic habitats for enhanced visitations to them by visitors.

6.8 Scenic Tourism

Tourists are increasingly seeking for experiences that are value for their money. Making tourism roads, routes, drives, byways, railways, and theme-highways that pass through areas of natural or cultural beauty makes travel to destinations part of the tourist's experience.

The following policy guidelines shall apply: -

1. Counties will be encouraged and supported to develop their scenic sites and empower local communities to maintain them for tourism development.
2. Counties will be encouraged to develop infrastructure leading to and around scenic tourism products.
3. Mechanisms will be put in place to profile and promote iconic scenic sites for enhanced visitations to them by visitors.

6.9 City/ urban Tourism

Urbanization and the increase in rural urban migration has positioned cities and urban areas uniquely for multiple tourism activities.

The Government will endeavour to ensure the following:

1. Nairobi Urban Regeneration will be supported and promoted. The same will be encouraged in other cities and urban areas.
2. Nightlife in cities and urban centres will be encouraged and promoted.
3. Mechanisms will be put in place to encourage counties and urban centers to zone areas that will be open to business and entertainment on a 24-hour basis.

6.10 Adventure Tourism

Kenya has many resources that can be harnessed toward active tourism that combines experiences, local interactions, and physical activities that can help tourists explore and connect with self, nature and communities. This type of tourism is increasingly becoming popular among young people and adventurous persons. Adventure tourism enthusiasts move from one place to another, often outside their comfort zones, for experiences or travel to remote areas, exotic areas, and even hostile areas.

The Government will endeavour to ensure the following:

1. Counties and businesses will be encouraged and supported to develop their adventure tourism products and experiences and to empower local communities to maintain them for tourism development.
2. Counties and businesses will be encouraged to develop infrastructure leading to and around adventure tourism products/experiences.

3. Mechanisms will be put in place to profile and promote iconic adventure tourism products/experiences (e.g. skydiving, mountain/hill climbing, scuba diving, etc.) sites for enhanced visitations to them by visitors.

6.11 Sports Tourism

Kenya is known for global leadership in athletics, particularly in the marathon. Sports tourism is one of the fastest growing sectors of tourism. More and more tourists are getting interested in sporting activities during their trips, whether sports are the main objective of travel or not. Sports events of various kinds and sizes attract tourists as participants or spectators. Sporting events of various kinds and sizes also attract tourists as participants or spectators.

Government shall endeavour to ensure the following:

1. Kenya sports champions and legends are engaged and provided opportunity in the promotion of Kenya.
2. Strategy will be made to attract regional and international sporting events to be held in the country.
3. Plans will be made to organize in Kenya sporting events that attract participation from regional and international participants.
4. Local flavours will be added to all sporting events held in the country so as to distinguish them and provide authenticity.

6.12 Health and Wellness Tourism

Health and wellness tourism strongly intersects two large and growing industries, namely, the \$2.6 trillion tourism industry and the \$4.2 trillion wellness industry. Holistic health and prevention are increasingly at the center of consumer decision-making, and people now expect to continue their healthy lifestyles and wellness routines when they are away from home. The health and wellness tourism economy includes all expenditures that tourists make to improve or maintain their health and wellbeing during their trip.

The following policy guidelines shall apply: -

1. Strategies will be put in place to encourage and promote health and wellness tourism in the country.
2. Mechanisms will be put in place to profile and promote health and wellness products, including beauty treatments, SPA, weight management, physical fitness, stress management, and relaxation, for enhanced visitations to them by visitors.
3. Counties will be encouraged to support the development of health and wellness tourism products and experiences.

6.13 Elderly Care Tourism

Elderly care or seniors tourism offers travel and touring exposure to a specific age group of tourists that have retired from active employment and have a lot of leisure time in hand. The quality of service provided by operators of this form of tourism is a very important criterion with close monitoring and utmost care. Old age makes the senior tourists physically weak and vulnerable to weather fluctuations, stress, and other hardships of

tours that younger tourists can withstand. Underpinned by our culture of care and respect for the elderly, Kenya will esteem elderly care/seniors tourism.

The Government will endeavour to ensure the following: -

1. A policy and strategy on elderly care tourism will be developed and implemented.
2. A framework to incentivise and attract the elderly from developed countries to retire in Kenya will be developed.
3. A scheme to incentivise and attract businesses to invest in the elderly care tourism will be developed.

6.14 Desert Tourism

Kenya has more than half of its land mass in arid and semi-arid areas. These areas are characterised by the wild and rugged terrain that provides a real challenge for the desert adventurer. According to the UNWTO, the types of tourists that have traditionally visited deserts tend to be curious and keen on adventure or history. They love to immerse themselves in different environments and, are open-minded in searching for opportunities to share experiences with local populations. Tourists in search of new encounters, discoveries, tranquillity, and space find desert areas particularly appealing.

The Government will endeavour to ensure the following:

1. Frameworks will be put in place to encourage and promote desert tourism in the country.
2. Mechanisms will be put in place to preserve the great heritage in desert areas against negative impacts that tourism in the areas could generate.

6.15 Infrastructure

Competitiveness of a tourism destination heavily relies on the availability and quality of infrastructure. Some of the key infrastructure that need to be developed to support tourism includes; road, rail, air, water transport, ports, electricity, water and sanitation, communication and ICT.

6.15.1 Roads

In the recent past, the government has invested heavily on the road network resulting into easy accessibility of tourism circuits and areas.

The Government in collaboration with stakeholders will endeavour to:

1. *Ensure that tourism circuit roads are mainstreamed into the National Roads Investment Plan.*
2. *Give high priority for upgrading, rehabilitation and periodic maintenance and signage for access roads to regional and local tourist destinations.*
3. *Implement regulations, guidelines and measures for licensing Tourist Service Vehicles (TSVs) and operators.*

4. *Ensure that tourism circuit roads are well marked (signage programme) under close collaboration with the Ministry responsible for roads, County Governments and other stakeholders.*
5. *Encourage County Governments to support access roads to tourist sites under their jurisdiction.*
6. *Kenya Wildlife Service to prioritise upgrading and maintenance of tourism roads.*

6.15.2 Air

Air transport is an enabler to the tourism development. Kenya has several international airports as well as domestic airports and airstrips. The government has undertaken several modernization and expansion of international, domestic airports and airstrips; this has greatly increased international and domestic inter-connectivity.

The Government will endeavour to:

1. *Ensure that all international and domestic airports are expanded, properly serviced and well maintained and where applicable construct new ones through public/private partnerships.*
2. *Ensure that airstrips in designated tourism circuits are secure, properly maintained and with efficient communication network.*
3. *Encourage competitive airport service charges, taxes and aviation fuel cost to attract more international and regional air operators.*
4. *Redesign its visa regime so as to provide friendly, favourable and facilitative entry and exit procedures from Kenya.*
5. *Promote coordination of inter-regional airline schedules.*
6. *Encourage bilateral and multilateral agreements on air travel with a view of opening up airspace for both scheduled airlines and charters.*
7. *Ensure all aircraft and balloon operations are done in accordance with recognized standards.*
8. *Provide incentives to attract more international, domestic airlines and charter flights.*
9. *Modernize and expand Jomo Kenyatta International Airport to a world class airport and make it an aviation hub in the Africa region.*
10. *Encourage the restructuring of Kenya Airways to be the national carrier with responsibility of growing the destination.*
11. *Modernization of local airstrip within key tourism attraction sites.*
12. *To attract local airlines investments.*

6.15.3 Railway and Port Services

1. The rail transport plays a very important role in tourism. The government is continuously modernizing railway transport with a view to make it attractive for both passenger and cargo transportation.
2. The standard gauge railway (SGR) has revolutionized railway transport and facilitates fast movement of tourists.
3. All cities still lack railway system that could facilitate city tours and easy transport of tourists.
4. Ports are major gateways into the country. The recent development of water infrastructure is likely to enhance water transport and connectivity across the region.

The Government will endeavour to:

1. *Expand the SGR network to cover other areas in Kenya and link to other countries in the region.*
2. *Encourage the introduction of dedicated premium train services for tourism*
3. *Encourage public/private partnership investments in railway trams and city tour bus in cities and other urban centres.*
4. *Streamline operations at the ports of entry to enhance tourism.*
5. *Ensure that coastal and inland water ports become international and regional hub for cruise tourism by provision of appropriate incentives and infrastructure.*
6. *Develop cruise tourism strategy and infrastructure.*
7. *Provide a regulatory framework to ensure safe operations of water vessels used in tourism activities.*
8. *Provide incentives for investment in water passenger vessels, ferries and leisure boats.*
9. *Develop supportive innovative projects such as underground rail tunnels*

6.15.4 Communication and ICT

Communication is the most important tool that can be used in the tourism industry and the use of modern ICT tools can ensure efficient and effective communication.

Uptake of modern communication platform in the sector is relatively low compared to our competitors, which has an impact on our competitiveness.

The Government will endeavour to:

1. *Require that all tourist facilities (including convention facilities) and public areas provide access to internet at an inclusive service rate.*
2. *Encourage e-tourism. The government shall develop an e-tourism portal as a one-stop-shop information resource centre for tourism in the country.*
3. *Encourage provision of free Wi-Fi in public areas.*
4. *Enhance ICT skills development amongst the tourism workforce.*
5. *Establish an integrated communication system in the industry*

6.15.5 Water and Electricity

Water is still a scarce resource especially in areas with high tourism traffic. Despite this, water supply and sewerage systems are poorly developed. In addition, the cost of acquisition is relatively high.

Electricity connectivity around the country has improved in the recent past. However, the cost of electricity in Kenya has remained expensive with frequent outages. This has greatly affected the service delivery in hospitality and tourism sector.

The Government in collaboration with stakeholders will endeavour to:

1. *Provide efficient clean water supply and sewerage services in all tourist areas.*
2. *Encourage recycling of water and appropriate disposal of waste.*
3. *Promote installation and use of renewable energy such as solar, wind, biogas and micro-hydro as sources of energy by tourism enterprises.*
4. *Provide incentives for investment in alternative sources of energy.*
5. *Ensure electricity and water charges are competitive.*
6. *Encourage peaceful coexistence among communities and tourism investors as regards shared natural resources.*

6.15.6 Health, Safety and Security

Health aspect is key in determining travel plan by any visitor. Tourism practitioners are therefore judged with the responsibilities to ensure they maintain health standards within the value chain. Safety and security of both the hosts and visitors are pre-requisites to a growth of sustainable tourism in a destination.

In this regard, it is vital that every effort is made to foster and maintain an environment that provides assurance to visitors on their security and safety.

The Government will endeavour to:

1. *Establish the Tourism Protection Service to provide safety and security of host and visitors in tourism areas.*
2. *Establish and equip a strengthened National Tourism Crisis Management Center under a multi-stakeholder governance structure to anticipate and respond to crisis.*
3. *Equip and operationalize the Global Tourism Resilience and Crisis Management Centre – Eastern Africa at Kenyatta University to fulfil their mandate of researching, capacity building, creating, producing and generating knowlegde, toolkits, guidelines, policies and projects on tourism resilience and crisis management, for the tourism industry in Kenya and the wider East African Region.*
4. *Government in consultation with stakeholders will encourage compliance by all the visitors to recognized health standards*
5. *Enhance collaboration and partnerships between relevant Government security agencies, private sector and local communities in provision of security and safety to both hosts and visitors.*
6. *To develop and implement food safety and hygiene standards.*
7. *Ensure appropriate tourism sector safety guidelines, procedures and measures are developed and implemented.*
8. *Encourage tourists and investors to take insurance covers.*
9. *Develop and implement a Code of Conduct for tourism practitioners*

6.15.7 Tourism Circuits

This is a fully integrated system of transport infrastructure and alternative modes, supported by a range of infrastructure, technologies and building services. Most of the circuits are not well developed and lack basic auxiliary services to support tourism.

The Government will endeavour to:

1. *Develop effective integrated tourism circuits.*
2. *Encourage cooperation among counties on development of shared resources and circuits.*
3. *Establishment of signage and display boards showing tourism maps and documentation on places of interests and tourism attractions.*

6.16 Tourism Promotion and Marketing

The primary objective of undertaking any marketing activity is to grow visitor numbers. Successful marketing is key to the long-term sustainability of tourism in Kenya. Marketing of tourism is an essential component and the government needs to shape its execution through development of marketing policies and strategies.

6.16.1 International Tourism

To enhance international tourism, the government in collaboration with stakeholders will endeavour to:

1. *Develop a National Tourism Marketing Strategy to guide and inform tourism marketing and promotion of the country.*
2. *Enhance and promote public private partnerships in promotion and marketing the country as the premier tourist destination.*
3. *Develop and promote a super brand for Kenya as a destination*
4. *Strengthen national tourism marketing agency responsible for promotion and marketing.*
5. *Enhance Kenya's overseas representation through tourism expert's resident in key source markets.*
6. *Enhance collaboration between the national tourism-marketing agency and the Kenya Missions abroad on destination marketing.*
7. *Strengthen and Consolidate the National Convention Bureau as the agency responsible for MICE and associated facilities covering the whole country.*
8. *Establish mechanisms for feedback and to monitor the effectiveness of tourism promotion and marketing efforts.*
9. *Encourage adoption of innovative on-line and digital marketing*
10. *Encourage collection of market information and intelligence to harness targeted marketing*

6.16.2 Regional tourism

Regional tourism is an important market segment for the country's tourism sector. Kenya is well placed to harness this market segment through cooperative marketing and regional partnerships. However, joint tourism activities have been hampered by differential policies. In this regard, the government will endeavour to:-

1. *Harmonize regional policies dealing with tourism development, promotion and marketing.*
2. *Encourage intra-Common Market tourism and strengthen the East African Tourism Council.*
3. *Eliminate barriers on visa and travel restrictions for bona fide visitors within the region.*
4. *Embrace joint marketing of Africa and East African community as a single tourist destination.*
5. *Promote the establishment of trans-boundary and trans-frontier conservation areas as a tool for enhancing regional tourism integration.*

6. *Adopt a common approach to tourism research, standards, classification and training.*

6.16.3 Domestic Tourism

Domestic tourism is significant for Kenya's tourism industry as it addresses the challenges of international tourism seasonality. In addition, Kenyans traveling in their country helps to unite and promote peace in the country.

In order to enhance domestic tourism, the Government, in collaboration with county government, stakeholders, will endeavor to:

1. *Develop and implement a Domestic Tourism Strategy and strengthen the capacity of Inter-County Regional Boards and Councils.*
2. *Encourage investment in budget-priced tourism facilities.*
3. *Promote and support domestic tourism promotional activities.*
4. *Adopt a common approach to tourism research, standards, classification and training.*
5. *Develop County government capacity for domestic tourism.*
6. *Develop and implement incentive mechanism for domestic tourism.*
7. *Endeavor to foster awareness on Domestic tourism*
8. *Encourage distribution of tourism opportunities and benefits.*

6.17 Tourism Investments

Tourism has become an important sector that has direct impact on development of countries' economies. Tourism investment is driven by the market needs. Investment is essential to build competitive and sustainable tourism sector.

The investments may include construction of hotel and restaurant facilities, entertainment joints and tour firms among others. The main benefits of tourism investment are income creation and generation of jobs. For many regions and countries, it is the most important source of welfare.

In order to increase investment in the sector, the government in collaboration with other stakeholders will endeavour to:

1. *Source for funding for development of tourism facilities*
2. *Create incentives/disincentives to attract more investment in the tourism sector*
3. *Ensure a conducive business environment for investment in the tourism sector.*
4. *Profile and Package the investment opportunities in the sector in readiness for interested investors*
5. *Benchmark with countries who have successful investment models*
6. *Create a special fund for the vulnerable groups in the sector*

7. *Establish special funding schemes/stimulus packages for tourism regeneration*
8. *Promote joint ventures/partnerships in tourism development*
9. *Encourage redistribution of standard accommodation and related tourism facilities*
10. *Embrace the use of modern technology in enhancing investment*
11. *Develop guidelines on partnerships between communities and investors*
12. *The government will support local and international interventions on Blue Economy*
13. *Support development of local franchise for tourism development.*

6.18 Tourism Ethics, Quality and Standards

6.18.1 Tourism Ethics

Ethics are important constitutive aspects of sustainable tourism. Sustainable tourism obligates all actors to respect and adhere to established norms and practices particularly with respect to the environment and culture of the country. For example, the protection from commercialization of culture as well as *pornography* and child sex exploitation requires the joint efforts of the public and private tourism sector players.

In this regard, the government will: -

- a) *Develop and implement a code of ethics for the tourism industry*
- b) *The government will mitigate Human rights abuses that occur throughout the tourism supply chain.*

6.18.2 Tourism Quality and Standards

Standards are essential catalysts in the development of a competitive tourist destination. Explicitly, the development of standards not only improves destination competitiveness but also improves the economic, social and environmental management thus ensuring sustainable development. Currently there is lack of innovation and compliance in tourism enterprises, products and services. Further, practices of eco-certified facilities are not supported by recognized best practice tourism standards with credible suitability criteria. It is therefore imperative that standards are enhanced to not only boost economic, environmental and cultural sustainability but also alleviate poverty and promote social inclusion.

In this regard, the Government in collaboration with stakeholders will:

1. *Develop and implement a code of practice for the tourism sector that sets out the minimum standards and guidelines for best practices*
2. *Promote the development, review and implementation of minimum standards for regulated tourism enterprises, services and activities.*
3. *Encourage and support county governments to enact appropriate legislation with requisite enforcement to enhance safe, secure and quality tourism.*
4. *Review and reform the existing structure, criteria and system of standards and classification of regulated tourism enterprises, activities and services*
5. *Encourage tourism private sector operators and communities to form umbrella associations with codes of practice to enhance self-regulation.*
6. *Issue compliance certificates to regulated tourism enterprises, activities and services upon compliance to minimum standards.*

6.19 Tourism Human Resource Development and Training

The success of the tourism industry and ultimately of the destination depends on the quality of human capital. Tourism is a labour intensive industry and therefore has a potential to substantially contribute to the labour market. The real human resource challenge for the tourism industry is recruiting and training employees with the right skills, knowledge and attitudes to their work.

To realise this government in collaboration with stakeholders will:

1. Improve and expand existing Hospitality and tourism training facilities.
2. Develop, review and implement hospitality, tourism curriculum standards and certifications in line with the market needs.
3. Endeavour to develop and implement a Human Resource Strategy for the Tourism sector
4. Encourage technical knowhow and exchange programs within and outside the region for both students and personnel working in the tourism sector.
5. Regulate hospitality and tourism training institutions.
6. Increase access to training opportunities by offering scholarships and incentives.
7. Promote youth skills transfer and mentorship programs in the sector.
8. Re-engineer and restructure Kenya Utalii College to provide leadership as a centre of Excellence in the transformation of tourism and hospitality training
9. Create and promote partnerships with tourism and hospitality training institutions.
10. Encourage and support capacity building for small, micro and medium enterprises and emerging entrepreneurs in tourism.
11. Develop regular programs for skills upgrading for all personnel who interact with visitors.

12. Encourage good labour relations in the sector.
13. Encourage tourism professionals to form associations for self- regulation.

6.20 Tourism Research and Knowledge Management

Successful implementation of the marketing and product strategies will be premised on sound, credible and timely research. In addition, investment in the industry will be underpinned by sound research to ensure that appropriate investments are made into the sector.

Knowledge management is the systematic management of knowledge assets for the purpose of creating value and meeting tactical and strategic requirements; it consists of the initiatives, processes, strategies, and systems that sustain and enhance the storage, assessment, sharing, refinement and creation of knowledge.

The government in consultation with stakeholders will:

1. Develop and implement appropriate regulations requiring regular submissions of data by tourism agencies and facilities.
2. Encourage and support County Governments to establish a tourism information management system.
3. Provide meaningful information and timely analysis to stakeholders in the tourism sector
4. Provide efficient knowledge and database management systems for the tourism sector
5. Establish a measurement framework to track progress on targets, objectives and the performance of the industry.
6. Establish mechanisms for sharing information and research between government entities, Researchers and stakeholders
7. Adopt the use of technology in research, knowledge and information management in the sector.
8. Strengthen the functions of Tourism Research Institute in undertaking and coordinate tourism research and information management.

6.21 Tourism Pricing

Kenya is a free market economy where forces of supply and demand dictate the prices. In the tourism sector, operators therefore set their prices based on the cost of inputs and other related services.

However, there is need for the country to adopt dynamic pricing strategy geared towards growing the tourism market by making the Kenyan destination price attractive to both international and domestic tourists. Therefore, the ability of Kenya as a destination to compete globally depends largely, along with other conditions, on the mixture, quality and prices of the facilities and services offered.

To ensure competitiveness, the Government in collaboration with stakeholders will endeavour to:

1. *Adopt a consumer sensitive pricing strategy.*
2. *Encourage online transactions including payments.*
3. *Encourage value for money through offering of quality products and services.*
4. *Seek to eliminate a discriminative policy for residents and non-residents.*
5. *Encourage and promote price dynamism sensitive to seasons, targeted groups and experiences to grow tourism clientele base for the industry.*

6.22 Funding and Resource Mobilization for Tourism Development

The tourism sector has continuously suffered from inadequate funding. This has led to degradation of tourism facilities and therefore lowering quality of the products and services. The sector requires sufficient and sustainable financing to successfully achieve its desired goal. The current allocation to the sector is inadequate.

To address this, the government established a Tourism Promotion Fund, which will be dedicated to the development and promotion of the tourism sector, in addition to the current catering levy collected from the private sector. However there will be need to complement this fund by harnessing additional funding from development partners, private sector and civil society organizations.

The Government in collaboration with stakeholders will endeavor to:

1. *Harmonize and merge the Tourism Fund and Tourism Promotion Fund to mobilize resources for tourism development.*
2. *Provide adequate resources for tourism development to complement the annual budgetary allocation.*
3. *Provide incentives and special schemes for development of the tourism sector.*
4. *Promote participation of the private sector, communities, individuals in tourism development through provision of fiscal incentives .*
5. *Broaden the revenue and funding base to ensure the financial sustainability of tourism sector.*
6. *Ensure that mobilized funds are utilized for purposes that have direct benefit to the sector.*

7. *Encourage joint ventures/partnerships for funding tourism development activities.*

6.23 Tourism International Cooperation

Tourism is greatly influenced by international instruments such as United Nations World Tourism Organization (UNWTO), International Air Transport Association (IATA), Universal Federation of Travel Agents Association (UFTAA), World Travel and Tourism Council (WTTC) and International Civil Aviation Organization (ICAO). Significant benefits can be realized and increased through such co-operation.

To enhance international cooperation on tourism matters, the Government will endeavor to:

1. *Establish and strengthen coordination mechanisms to ensure consistent negotiations and implementation of tourism-related bilateral and multilateral agreements.*
2. *Ensure domestication of regional and international tourism-related instruments.*
3. *Encourage the participation of Kenya in strategic regional and international bodies.*

6.24 County Tourism Development

Tourism attractions and facilities are located in certain localities throughout the country. Tourists visit to enjoy the wonderful tourism experience. The county governments are the custodians of tourism products and services hence play a vital role in tourism development in the country.

In this regard, the government in collaboration with county governments will endeavour to:

1. Develop frameworks and mechanisms for collaboration with County Governments
2. Support County Governments in the development of local tourism products through issuance of guidelines and technical assistance.
3. Support County Governments in establishing sub-national tourism fora
4. Support County Governments to provide necessary tourism infrastructure
5. Encourage Counties to provide incentives for potential investors in the tourism industry.
6. Encourage and support Counties to establish and maintain Tourism Information Centres and tourism signage

6.25 Tourism and gender equality

The Constitution of Kenya contains important commitments to gender equality and women's empowerment. It provides for opportunity to promote gender equality and women empowerment and the full participation of women, men, girls and boys in

social, economic, cultural and political spheres at all levels in both public and private spheres. Gender equality matters because basic human rights should be equal for everyone, independent of their sexual identity. Tourism has a pivotal role to play in achieving the objectives at the heart of the 2030 Agenda for Sustainable Development, in particular the commitments to gender equality and the empowerment of women in Sustainable Development Goals

This policy shall endeavour to

- 1. Show Commitment to gender equality*
- 2. Identify relevant gender gaps in the areas of employment, and entrepreneurship*
- 3. Eliminate discrimination in access to employment, promotion and training including equal remuneration to enhance income security for both men and women.*

CHAPTER SEVEN

7.0. LEGAL AND INSTITUTIONAL FRAMEWORK

Tourism must be developed with long term sustainability; hence the existing legal and institutional framework needs to be reviewed. Tourism development will be supported by review and formulation of policies, institutional reform and the necessary legal frameworks.

7.1. Legal Framework

Currently the tourism sector is operating under the Tourism Act 2011. There is need to review the act and the corresponding regulations to clarify the mandates and roles of the existing institutions with a view to:

- 1. Remove duplication and overlap of mandates and functions.*
- 2. Strengthen the policy and oversight role of the Ministry.*
- 3. Ensure that policy and enabling legislation are in tandem with emerging tourism issues.*
- 4. Strengthen institutional governance.*

7.2. Institutional Framework

The changes that have taken place since the implementation of this policy have weakened the role of the Department of Tourism. As a result, State corporations operate without the support, coordination and policy inputs of the Ministry of Tourism and Wildlife. In this regard, there is need for a paradigm shift to rationalize the functions of the State Department for Tourism and the institutions under it. This will avoid overlapping, duplication and conflicting mandates and responsibilities.

To streamline institutional arrangement within the tourism sector, the Government will endeavour to:

- 1. Rationalize and reorganize the functions of the ministry and her state corporations.*
- 2. Restructure the directorate of tourism.*
- 3. Merge Tourism Fund and Tourism Promotion Fund*
- 4. Transfer functions of Tourism Finance Cooperation to the proposed Kenyan Development bank.*
- 5. Re-engineer the Kenya Utalii College to fulfil its mandate*
- 6. Strengthen the regulatory role of the ministry that keeps the tourism industry within standards to re-engineer destination competitiveness and appeal*

CHAPTER EIGHT

8.0. LINKAGES WITH OTHER SECTORS

To achieve sustainable tourism, it is imperative that tourism considerations are incorporated into all sectors of the economy. Special attention must also be given to cross cutting issues such as mainstreaming needs of persons with disabilities, gender, youth and HIV/AIDS.

8.1. Linkages with other sectors

Tourism is a cross cutting sector and therefore has linkages with several sectors of the economy. Consequently, an agreed framework within the sectors and across sectors on the coordination of tourism development at all levels will assist in clarifying the roles and responsibilities.

To enhance linkages between the tourism sector and other sectors, the Government will endeavor to:

- 1. Establish tourism inter-agency tourism council to coordinate and guide implementation of the policy.*
- 2. Establish the national tourism council to coordinate tourism activities between national, county government and the private sector.*
- 3. Establish regional tourism councils to enhance coordination of tourism activities across counties.*
- 4. Encourage roundtable meetings with various stakeholders to enhance dialogue and partnerships.*
- 5. Encourage appropriate use of the sector-wise approach (SWAP) as a tool for coordinated planning that will ensure incorporation of tourism concerns.*
- 6. In consultation with National Environment Management Authority, (NEMA), develop and implement tourism sector environmental impact assessment guidelines.*

8.2. Partnerships and Stakeholder Involvement

The private sector plays a critical role in the development and promotion of tourism. It bears the risks of investment as well as the responsibility of satisfying the visitor. The sector is well placed to promote the involvement of local communities in tourism ventures by, *inter alia*, establishing the appropriate partnerships. To enhance partnerships and stakeholder involvement, the Government in collaboration with stakeholders will endeavour to:

- 1. Provide an enabling environment and appropriate incentives to enhance public private partnerships. (PPP)*
- 2. Provide an opportunity for private sector and communities to participate actively in developmental planning and implementation of sustainable tourism development.*
- 3. Encourage and promote formation of an umbrella association for the tourism sector as a platform for a common voice and self-regulation.*
- 4. Create a special funding mechanism for host communities and vulnerable groups.*
- 5. Involve local (host) communities in the tourism industry by establishing partnership venture, out-sourcing and purchase of goods and services.*
- 6. Encourage and support the Government policy on “Buy Kenya Build Kenya”*

8.3. Tourism Education and Public Awareness

Sustainable tourism must be encouraged through coordinated and structured education and public awareness programmes. In this regard, the Government in collaboration with stakeholders will endeavour to:

- 1. Support the development and implementation of a tourism education and public awareness strategy.*
- 2. Encourage travel by the public and students to tourism destinations.*
- 3. Encourage and support formation of tourism clubs in learning institutions.*
- 4. Develop guidelines on the use of indigenous knowledge*
- 5. Lobby the Ministry of Education to incorporate tourism and hospitality education, training and capacity development in their council.*

CHAPTER NINE

9.0 IMPLEMENTATION STRATEGIES AND ACTIONS

The main responsibility of the Government is to ensure that this Policy is realized. The proposed implementation strategies and actions presuppose active participation of stakeholders at all levels. In this regard, the following strategic actions will guide the implementation of this Policy:

9.1 Integration of Tourism Concerns in Sectoral Policies, Development Planning and Budgetary Processes

Integration of tourism considerations in all relevant sectoral policies, planning and development processes is critical for this Policy to achieve the set Goal and Objectives. In order to operationalize this Policy, the Ministry responsible for tourism has to take the leadership role in ensuring that all sectoral policies, planning and development processes mainstream tourism considerations. The following specific actions will be taken:

1. *Convene regular consultations with stakeholders at international, national and county levels.*
2. *Enhance coordination among ministries and lead agencies.*
3. *Coordinate the development of tourism products and services.*
4. *Strengthen mechanisms for coordinating and harmonizing the development and implementation of the integrated tourism development area plans.*
5. *Strengthen and facilitate ministry's engagement with actors in the tourism sector.*
6. *Strengthen the Tourism Sector Safety, Crisis Management and Communication Centre through public private partnership.*

9.2 Amendments to the Tourism Act, 2011

To realize changes in the policy, the government will amend the Tourism Act, 2011 to streamline and coordinate delivery and achieve harmony within the sector as directed by cabinet.

9.3 Clarifying Roles and Responsibilities

Implementation of this Policy will involve different players, including national and county Governments, state agencies, private sector, civil society organizations, local communities and the general public. The table below shows various roles and responsibilities to be performed by the institutions under the Ministry.

Institution	Role and Responsibilities
State Department for Tourism	Policy direction and oversight
1) Directorate of Policy, Research and Innovation	The responsibilities are specified thus: - ✓ Formulation and implementation of National Tourism policy, legislation and strategy

2) Directorate of Tourism Development and Promotion 3) Directorate of Tourism Investment and Finance	✓ Development and implementation of National Tourism Blueprint 2030 ✓ Coordination of tourism product development ✓ Development of National Tourism Marketing Strategy ✓ Coordination of National, Regional and International relations, agreements and protocols in tourism ✓ Mobilize resources for tourism development ✓ Promote tourism investment ✓ Promotion of safety and security of tourists ✓ Development of tourism human capital ✓ Promotion and adoption of innovative practices and transfer of technology for tourism competitiveness ✓ Supporting and facilitation of research and knowledge sharing in tourism. ✓ Support public investment. ✓ Develop and publish annual tourism status report.
Tourism Regulatory Authority (TRA)	Regulation of the tourism sector The responsibilities are specified thus: - ✓ Formulate guidelines and prescribe measures for sustainable tourism to enhance standards and quality of tourism services, facilities and products; ✓ Regulate tourism activities and services countrywide, in accordance with the national tourism strategy; ✓ Register, issue compliance certificates and grade all sustainable tourism and tourist-related activities and services; ✓ Develop and implement criteria for standardization and classification of tourism facilities and services in consultation with relevant stakeholders; ✓ Develop and regulate tourism and hospitality curriculum, examination and certification in consultation with the ministry

	responsible for matters relating to education; ✓ Develop and implement a code of practice for the tourism sector; ✓ Monitor and assess tourist activities and services to enhance continuous improvement and adherence to sound principles and practices of sustainable tourism; ✓ Undertake, annually, an assessment and audit of tourism activities and services, measures and initiatives at the national level, and prepare and publish an annual national regulatory status report, in consultation with the Minister and the relevant lead agencies.
Kenya Utalii College (KUC)	✓ Tourism and hospitality training and capacity building
Kenya Tourism Board	Marketing Kenya as a tourist destination The responsibilities are specified thus:- ✓ Tourism marketing and promotion for domestic, regional and international markets. ✓ Coordinate and implement National Tourism Marketing Strategy. ✓ Develop and promote the Kenya's tourism destination brand.
Tourism Finance Corporation(TFC)	• Specialized financial institution and business advisory services in tourism sector ☑ Financial and business services
Tourism Research Institute (TRI)	Research and Development The responsibilities are specified thus: - ✓ Collect and analyse information, for the sector and other clients in the private and public sectors ✓ Assess strategies and techniques for product development and marketing; ✓ Undertake market intelligence; ✓ Determine, in consultation with lead agencies, the carrying capacities of the

	various tourism destinations and conservation needs and priorities; ✓ Assess information, that is the basis of integrated tourism development area plans; ✓ Research on sustainable tourism and other emerging areas; ✓ Give information on early warning, disaster management, impacts and mitigation and adaptive strategies to climate change; ✓ Organize symposia, conferences, workshops and other meetings to promote the exchange of views on issues relating to tourism research and analysis; ✓ Publish, annually, research findings and communicate recommendations to the relevant lead agencies, institutions and other stakeholders in the tourism sector;
National Convention Bureau	• Promote MICE in the local, regional and international markets. • Coordinate and implement the National Event Strategy. • Manage Kenya International Convention Center (KICC), BOMAS and Nairobi International Convention and Exhibition Center (NAICEC) and any other public convention centers.
Tourism Protection Service (TPS)	✓ Safety and Protection of visitors and hosts in all tourist destinations ✓ Coordinate operations of the National Tourism Crisis Management Committee (TPS to be consolidated within SDT)
Tourism Transformation Fund (TF)	• Mobilize resources for the tourism sector
County Government	Development of local tourism ✓ Formulate policies, plans and strategies for the development of the tourism sector in the county

	✓ Incorporate national tourism development strategies and programs into county integrated development plans. ✓ Integrate and enforce the provisions of the National Tourism Act in liaison with National Government tourism agencies and any other laws relating to tourism in the county laws. ✓ Develop and diversify competitive tourism products in the county ✓ Implement the tourism Area Plans as guided by the Framework for Tourism Area plans by the Ministry of Tourism and Wildlife ✓ Facilitate provision of funds for development of local tourism products and services. ✓ Develop and promote programs for attracting tourism investments in the County ✓ Collection, compilation and management of local tourism products ✓ Design and development of intra and inter County tourism routes and circuits ✓ Development and provision of tourism infrastructure ✓ Protection, conservation and promotion of cultural and historical sites ✓ Development and promotion of niche tourism products ✓ Develop manpower of tourism industry players within the Counties. ✓ Establish and manage Tourism Information Centers.
The National Tourism Council (NTC)	National Tourism Council brings together representatives of the Ministry, tourism state corporations, tourism trade and actors in the tourism supply chain, for purposes of experience – sharing and synergy building to advice the Cabinet Secretary and Ministry on matters related to tourism.

	✓ Advise the Cabinet Secretary on the industry trends, opportunities and challenges ✓ Foster sharing of experiences, expertise and resources in the sector ✓ Provide custodianship and endorsement on proposed national policies, legislation, standards and initiatives. ✓ Propose reviews, studies and interventions in specific areas to secure identified strategic objectives. ✓ Propose and undertake actions to support the growth of the tourism sector
The Inter-Agency Tourism Council (TIAC)	TIAC is a national platform that brings together representatives of government agencies that have a bearing on tourism to coordinate government action on tourism. ✓ Provide a platform for high level inter-agency consultation on tourism ✓ Ensure that tourism development is supported in policies, plans and programs across the public sector agencies ✓ To identify, prioritize, process and resolve all issues and bottlenecks affecting tourism development ✓ To ensure that Ministries, departments and agencies (MIDAS) in the public sector understand, support and mainstream tourism development in their Sector plans. ✓ To lend support to policies, plans and programs of public sector agencies that have direct implementation and enabling role in tourism.