REPUBLIC OF KENYA

MINISTRY OF TOURISM & WILDLIFE

STATE DEPARTMENT FOR TOURISM

REVISED NATIONAL TOURISM POLICY, 2020

ON

Enhancing Resilience and Sustainable Tourism in Kenya

FOREWORD

The tourism sector is one of the key economic drivers in Kenya, generating 8.8% of the country's GDP, worth USD 7.9 billion in 2018.This represents a growth of 5.6%, which was greater than the global average of 3.9% and the Sub-Saharan Africa average of 3.3%. Moreover, the sector has high multiplier effects as its growth stimulates further development in other activities. The sector accounts for over 10% of total employment, contributes 9% to GDP; 18% Foreign Exchange earnings and is a major source of Government revenue at 11% in form of taxes, duties, licence fee, park entry fees among others.

Since the formulation of this policy five years ago, there has been a major change in the sector. Key institutions have been established and critical lessons learnt. The objective of this review is to accelerate the re-engineering of the sector, clarify and consolidate the roles of various agencies, including national and county governments and strengthen the role of the private sector. This will facilitate the continued development of an economically and environmentally sustainable tourism sector that is also spatially balanced. This review has also taken cognisance of the sector internal and external changes in environment since the promulgation of the Kenya Constitution 2010, which ushered a new dispensation including two levels of government with distinct but dependable roles, a new governance architecture and an empowered citizenry.

More recently, the Ministry has identified areas that need to be strengthened or changed. This, together with increased funding, stakeholder support, enterprise development and capital investment has underpinned recovery and growth in the industry. It is therefore timely to commence a review of tourism policy to enhance this growth and take into account emerging issues, which include the Sustainable Development Goals, and other global and regional developments as well as challenges like climate change.

Further, there are other measures in place such as redeeming of destination image and positive publicity by employing public relation tools, product diversification, provision of

high quality standards of products and services, tourism area planning and incentives to attract investments in tourism sector and elaborate protocols in the sector to deal with Covid 19 pandemic.

Following the review, we plan to issue an overarching tourism policy statement to provide the necessary direction to support a competitive, resilient and sustainable tourism industry that gives clear direction to the various agencies carrying out their operational programmes.

Chapter one underscores the importance and contribution of the tourism sector to the local and national economy and employment creation. This section also highlights the existing policy instruments and the rationale for a Revised National Tourism Policy.

Chapter two reviews the status of tourism sector in the country and highlights the key issues and challenges in the sector.

Chapter three spells out the goals and objectives of the Policy. In addition, it espouses fundamental guiding principles that should inform the implementation of this Policy.

Chapter four deals with actions that would enhance sustainable tourism, in particular: tourism products and services, ethics, standards, pricing, research, information management, technology and innovation, infrastructure, safety and security.

Chapter five discusses tourism development, promotion and marketing and proposes innovative ways of making Kenya a preferred tourist destination.

Chapter six deals with legal and institutional framework for effective coordination and management of the sector.

Chapter seven provides tools for enhancing cross and inter-sectoral linkages as well as building of public private partnerships.

Chapter eight outlines strategies and actions that will ensure effective implementation of this Policy.

Finally, let me invite fellow Kenyans and especially, those serving in the newly formed county governments and our partners in the tourism sector to take advantage of the opportunities that come with this policy review.

Hon. Najib Balala, EGH

CABINET SECRETARY

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ACRONYMS AND ABBREVIATIONS

BoK	Bomas of Kenya
COMESA	Common Market for Eastern and Southern Africa
DFI	Development Financial Institution
DoT	Directorate of Tourism
DTCK	Domestic Tourism Council of Kenya
EAC	East African Community
EIA	Environmental Impact Assessment
EMS	Environmental Management System
ERSWEC	Economic Recovery Strategy for Wealth and Employment Creation
E-Tourism	Electronic Tourism
GDP	Gross Domestic Product
HIV/AIDS	Human immunity Virus/Acquired Immuno-Deficiency Syndrome
IATA	International Air Transport Association
ICAO	International Civil Aviation Organization
KICC	Kenyatta International Convention Centre
KTB	Kenya Tourism Board
KUC	Kenya Utalii College
MICE	Meetings, Incentives, Conferences and Exhibitions
MSF	Multi-Stakeholder Forum
NCB	National Convention Bureau
NEMA	National Environment Management Authority
NPI	Nonpharmaceutical Interventions
NTIMS	National Tourism Information Management System
SWAP	Sector-Wide Approach
TF	Tourism Fund
TFC	Tourism Finance Corporation
TPF	Tourism Promotion Fund
TPS	Tourism Protection Service
TRA	Tourism Regulatory Authority

TSV	Tourism Service Vehicle
UFTAA	Universal Federation of Travel Agents Associations
UNWTO	United Nations World Tourism Organization
WTTC	World Travel and Tourism Council

1.0   INTRODUCTION

1.1   *Background*

1.1.1 Tourism is one of the leading sectors driving socio-economic development and job creation globally. The sector's benefits spread far beyond its direct impacts in terms of GDP and employment to indirect benefits through supply chain linkages to other sectors as well as induced impacts. According to World Tourism and Travel Council (WTTC) estimates in 2019, tourism's direct, indirect and induced impact accounted for 10.3% of global GDP (US$8.9 trillion), 330 Million jobs (1 in 10 jobs globally), US$1.7 trillion visitor exports (6.8% of total exports, 28.3% of global services exports) and 4.3% of total investment (US$948 billion capital investment).

1.1.2 Kenya mostly relies on international tourism with major source markets being Europe and the Americas. Arrivals from these sources have witnessed ups and downs over the years occasioned by global issues and destination challenges. With the push for Africa integration under Africa agenda 2063, regional tourism will be another key market, which will drive Kenyan tourism in the future.

1.1.3 Domestic tourism has the potential of playing a greater role in Kenya's tourism industry. The domestic tourism market has grown as more Kenyans have become aware of available tourism products and engage in travel and leisure. However, its growth potential is not yet fully tapped.

1.1.4 It is important to recognize that Kenya's tourism industry is closely linked to the ecologically sustainable development of the country's natural and heritage resources. Over the years, these valuable resources have suffered erosion and degradation through neglect and poorly planned developments. The industry should strive to build upon the increasing awareness of the interdependence of environmental concerns and promote sustainable tourism.

1.1.5 Over the years, the tourism industry has been exposed to a wide range of crises such as the severe acute respiratory syndrome (SARS) outbreak in 2003, the global economic crisis in 2008/2009, and the Middle East Respiratory Syndrome (MERS) outbreak in 2015. However, none of them led to a longer-term decline in the global development of tourism in terms of international tourist arrivals. This implies that tourism as a system has been resilient to external shocks. Although there is much evidence indicating that the impact and recovery from the COVID-19 pandemic will be unprecedented, the crisis holds important messages regarding the resilience of the tourism system. Of importance, given that nonpharmaceutical

interventions (NPI) have been touted as the main strategy to contain pandemics, the security, safety and hygiene standards of tourism facilities and services will underpin the recovery and resilience of the tourism sector in Kenya. Cognizant of other ongoing disasters that are potentially more devastating than COVID-19, such as climate change, the focus will be to ensure that Kenya adopts forward thinking innovation in its tourism development and management and develops the ability to initiate and respond to change revolving around the triple bottom line.

1.2 Existing Tourism Sector Policy Instruments

A number of significant developments have happened since the publication of Sessional Paper No.1 of 2010 that calls for a realignment of the Policy with these developments. First, Kenya promulgated a new Constitution of Kenya, 2010 replacing the old one and bringing into effect a new constitutional dispensation with a different architecture of government with shared responsibility for tourism between the National and County Governments.

In 2011, Tourism Act, 2011 was enacted and existing statutes relating to tourism were repealed. The Act brought in new institutions and some of the old ones were renamed. The government has also developed the National Tourism Blueprint 2030 that aims at redefining and redesigning the development and management of Kenya's tourism sector. In addition, the government also developed the Tourism Sector Plan 2018-2022 that aims to actualize the implementation of vision 2030. The East African Tourism Strategy, Inter-governmental Authority on Development (IGAD) and Agenda Africa 2063 are all instruments developed to guide regional tourism promotion in the region.

Other policy and legal instruments that have a bearing on tourism are The National Wildlife Conservation and Management Policy, Wildlife Conservation and Management Act 2013, Environmental Management and Conservation Act (EMCA) 1999 and Climate Change Act 2016 as well as Public Private Partnership Act 2013.

1.3 Rationale and Justification for a Revised National Tourism Policy

The review of the National Tourism Policy, 2010 is necessitated by a number of changes that have happened since its adoption so as to reflect new dynamism such as devolution and new developments in the sector.

Tourism sector has and continues to experience turbulence arising from political, technological, economic, security, safety, social and environmental spheres. For instance, the corona virus pandemic has had massive impacts on the tourism industry many of which will reshape the industry's future landscape. The Ministry

is cognizant of the fact that such unprecedented events require unprecedented responses. The Ministry is also alive to the fact that there are no rules or playbook for such turbulent situations and the right answer is constantly shifting. Nonetheless, the starting point must be a clear understanding and recognition of the changing face of tourism and consumption patterns of the 'new tourist'. This calls for adoption of new management strategies to re-engineer destination appeal and remain sustainable in a globally competitive scene. The changes arise from the country's commitment to transform and embrace innovation in development of sustainable tourism. In particular, the need to:

a) Align the National Tourism Policy and legislation with the new constitutional dispensation recognizing the role of county Governments in Tourism Development.

b) Implement the Cabinet directive on the need to align National Tourism policy and the National Tourism Blueprint 2030.

c) Re-engineer destination competitiveness and appeal.

d) Clarify the roles and responsibilities of various stakeholders and eliminate duplicity in the mandates and operations of institutions.

e) Enhance the oversight role and strengthen policy direction function for development of sustainable tourism throughout the country.

f) The need to champion the implementation of the recommendations of the Presidential Taskforce on Parastatal reforms.

g) Re-engineer a paradigm shift in the way tourism sector is managed given its cyclic nature, destination image and appreciating the role of information technology platforms in the development of tourism sector.

1.4   *The Tourism Policy Review Process*

1.4.1 In reviewing this National Tourism Policy, the Ministry pursued a consultative approach that involved: -

(a)   Constitution of a Ministerial technical taskforce

(b)   Identify Gaps and key lessons learnt in the last ten years and attendant challenges and opportunities

(c)   Engage the National Reference group

(d)   Hold Regional stakeholders' consultations

(e)   Establish synergies and areas of complementarity with relevant sectoral policies and institutions

(f)   Validate the draft National Tourism Policy

(g)   Submit to Cabinet for adoption and direction.

2.0   STATUS OF TOURISM SECTOR

2.1 The State of the Tourism Sector

2.1.1   Kenya's tourism resource base is enormous. Kenya's beach and wildlife safari resources remain unique and unmatched by competing destinations and the country has abundant other resources for diversification. There is also a great opportunity for repositioning and branding of Kenya's tourism even in the face of threats the destination has been grappling with and that success will largely depend on how the numerous sector challenges are addressed. The country's tourism attractiveness stems from its diversity.

2.1.2   The country offers unparalleled opportunities for other touristic activities such as a wide range of sporting activities, filming, bird watching, agro tourism, cultural, cruise tourism, conferencing and health facilities as well as an opportunity to experience the wildebeest migration in the famous Maasai Mara Ecosystem - a Seventh Wonder of the World. The variety of these attractions, especially the proximity of the country's beaches and wildlife areas, permits combinations of beach and safari holidays among other packages.

2.1.3   Tourism is one of the leading sectors driving socio-economic development and job creation globally. The sector's benefits spread far beyond its direct impacts in terms of GDP and employment to indirect benefits through supply chain linkages to other sectors as well as induced impacts. According to World Tourism and Travel Council (WTTC) estimates in 2019, tourism's direct, indirect and induced impact accounted for 10.3% of global GDP (US$8.9 trillion), 330 Million jobs (1 in 10 jobs globally), US$1.7 trillion visitor exports (6.8% of total exports, 28.3% of global services exports) and 4.3% of total investment (US$948 billion capital investment).

2.1.4   The outbreak of COVID-19 pandemic, resultant world-wide restriction on air travel and closure of Kenya's airspace and borders to passenger traffic, drastically impacted on the tourism sector. The pandemic has led to massive cancellation of bookings, loss of foreign exchange, loss of business/incomes and loss of jobs/livelihoods to Kenyans. Recent statistics indicates that tourist arrivals as at April 2020 has shrunk by almost a half to 392,691 compared to 619,698 same periods last year. Further, research findings indicate that the pandemic is likely to cost the industry US$ 511M in hotel revenue, US$ 125M in associated revenue and KS 2.5Billion for Catering levy. The findings also reveal that 81.3 per cent of the tourist establishments reduced their staff complement while 85.5 per cent effected pay cuts.

2.2 Significant Developments

A number of significant developments have and continue to happen within the country and this boosts tourism growth and development. They include among others improved road network across the country, expansion and modernization of airports and airstrips and beautification of major cities and towns. Completion of the standard gauge railway has greatly contributed to the promotion of domestic and regional tourism. The cruise terminal is under construction at KPA Terminal in Mombasa geared towards boosting Cruise tourism in the country.

There is increased electricity accessibility and connectivity across the country, which has enabled 24hours economy supported by street lighting programme.

To enhance security surveillance, close Circuit television cameras (CCTVs) have been installed in major cities and towns across the Country.

The East Africa single visa policy has expanded the tourist market and allowed for marketing the region as a single destination. In addition, Kenya grants visa on arrival status to most African countries.

To address the challenges of inadequate funding to the sector, the Government has established Tourism Promotion Fund, which is dedicated to funding development projects within the tourism sector.

Stakeholder engagements are due to be institutionalized with the creation of roundtables bringing together the public and private sector to address tourism issues across the country.

The sector has witnessed advancement in operations due to Innovations targeted at facilitating tourists' operations. These includes: - digital bookings and payments, MPESA transactions, VISA card transactions, social media channels for marketing among others.

2.3 Tourism Sector Issues and Challenges

Emerging Issues

Outbreak of Corona Virus (COVID-19) pandemic: The outbreak of Coronavirus (COVID-19) represents an important and evolving challenge to the tourism sector. The virus has triggered an unprecedented crisis in the economy given the immediate and immense shock to the sector.

Technologically Influenced Travel (Digital Marketing): Technology and the internet have provided easy access to information whereby a traveler can plan and book a holiday online. The marketing of the tourism products has also changed, as there is growth in digital marketing. Tourists' preference continues to change with technology and therefore digital marketing must be employed to reach wider audience.

Multi-generational Travel and market segmentation models: Tourists are becoming increasingly sophisticated as the needs of the traveler have changed across the generations

ranging from the young millennials (youth) and the baby boomers (the elderly). There is need to offer each group a product mix and experience that suit them.

Experiential Tourism: Today's traveler wants experiential travel and to interact with the destination through cuisine, entertainment, culture and heritage. The hotel-only offering is no longer appealing.

Air access: The mode of travelling and products on offer has changed from the all-inclusive package to one suiting the independent traveler; hence, the charter business is on a reducing trend. This has been brought about by emergence of cheaper airlines from the Middle East, which takes a relatively shorter time from almost any part of the world to Kenya.

Challenges

Low Product quality, 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, improve on quality of facilities and services and address the unexploited and underdeveloped products.

Inadequate Hotel and bed capacity: Where there is an increase in visitor arrivals, the bed occupancy levels during the peak season are at close to full capacity 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, the Coast and the South Rift. Other regions lack quality accommodation for touristic purposes.

It is imperative to substantially increase investment in accommodation in order to meet the ever-increasing demand for the 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 and/or maintenance. 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 some 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 our cities.

Uncoordinated Marketing: Marketing Kenya's tourism product is critical in enhancing sustainable tourism. This calls for integrated and coordinated campaigns to inform potential tourists about Kenya's attractions and facilities.

Inadequate safety and security: Kenya suffers from the challenge of perceived insecurity whilst other tourism destinations like France, Egypt and Israel are not so much affected by the effect of insecurity or terrorist attacks as in Kenya due to negative media publicity, poor destination imaging or little investment in public relation tools to ensure positive destination branding. In the past, Kenya's tourism sector suffered from incidents of insecurity. One of the major sources of this insecurity has been political instability in the region, which has led to increasing cross-border traffic in small arms. Other sources of insecurity include cattle rustling, income inequalities, and unemployment. The National Police Service needs to be strengthened to support the tourism sector in addressing safety and security issues. In addition, the Government 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 sea level, 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 need to practice sustainable tourism to mitigate the issues of climate change

Negative Publicity: The acts of 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 travel destination thereby deterring interest in the destination from both tourists and tourism services suppliers.

Incidences of Poaching: The rise in demand for wildlife products in the international market has led to a resurgence of elephant and rhino poaching. Escalating incidences of poaching, smuggling and trafficking of their trophies like ivory and rhino horns has led to loss of wildlife in their natural habitat. An increase in poaching is deemed proportionate to tourist security and affects the tourist's interest in the destination.

Funding Challenges: Development of tourism product and facilities are capital intensive that requires sustainable funding mechanism to ensure projects are successfully implemented. In addition, marketing of destination Kenya is affected by insufficient budgetary allocations. However, government funding for tourism development has been inadequate and therefore requires innovative financial mechanisms

Multiple Licensing Regimes: Most of the stakeholders especially the hoteliers have complained of high cost of doing business due to numerous licenses that they are 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 expensive destination.

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

3.0 VISION, GOAL, OBJECTIVES AND GUIDING PRINCIPLES

3.1 Vision

A preferred destination in sustainable tourism development

3.2 Goal

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

3.3 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.

3.4 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.

4.0 ENHANCING SUSTAINABLE TOURISM DEVELOPMENT

4.1 Tourism Recovery Programmes

4.1.1 Standards and Quality Assurance in the sector

Unlike the post-world war II economic recession, when the sector recovery was premised on availability of discretionary income, the industry recovery from the impacts of Covid-19 and other external shocks will likely be driven by hygiene factors, 'technological and mobility' factors and 'compulsion travel' among the current generation living in an 'experience economy'. It is also highly likely that most people are going to come out of the pandemic as "*germaphobic*". The starting point for a successful recovery strategy therefore must be a clear understanding and recognition of the changing face of tourism and consumption patterns of the 'new tourist'. Intuitively, embracing standards and quality assurance in the sector will not only aid the recovery efforts but also promote resilience and enhance sustainability of destination Kenya.

4.1.2 Sparking Domestic and Regional Tourism

Domestic tourism is the main driving force of the Travel and Tourism sector in major economies globally, accounting for 73% in 2017 and 71.2% in 2018 of tourism spending WTTC). In Kenya, domestic tourists' bed-night occupancy accounted for more than 50% of the total bed occupancy from 2015-2019. The number of domestic tourists bed-nights has increased from 2,948,000 in 2014 to 4,818,600 in 2019. To Spark domestic tourism, the government will undertake the following:

- Targeted marketing focusing on the growing middle class estimated to be 36.9% of employed workforce
- Research on domestic market preference
- Repackage tourism product with local market interests
- Development of circuits with specific itineraries
- Organized road transport to events and attractions.

4.1.3 Waiver of all Entry Visa Fees to Kenya for the next 24 Months

The COVID 19 is predicted to alter the lives of people and economies for years to come. In the meantime, domestic and regional markets are expected to partially sustain the tourism industry. However, to attract international tourists, several incentives are necessary beyond installation of health infrastructure that guarantees safety and security of travellers. The government will waive visa fees for all categories of travellers entering Kenya for 24 months with effect from 1st July 2020. This will send positive messages to travellers about Kenya. The country will benefit more from the multiplier effect of increased tourism traffic compared to the loss in visa receipts.

Mitigation against COVID 19 Pandemic

Tourism in Kenya has experienced an abrupt and unprecedented drop in demand that has led to closure of most hotels and areas that are visited by tourists.

The government has responded by developing immediate recovery strategies which include: - preparation and implementation of tourism industry protocols and promoting Kenya as a COVID19 tourism resilient zone among others

4.2   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*

4.3 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.

4.3.1 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.*

4.3.2 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. *Promote coordination of inter-regional airline schedules.*

5. *Encourage bilateral and multilateral agreements on air travel with a view of opening up airspace for both scheduled airlines and charters.*
6. *Ensure all aircraft and balloon operations are done in accordance with recognized standards.*
7. *Provide incentives to attract more international, domestic airlines and charter flights.*
8. *Modernize and expand Jomo Kenyatta International Airport to a world class airport and make it an aviation hub in the Africa region*
9. *Lobby for the Nationalization of Kenya Airways*
10. *Modernization of local airstrip within key tourism attraction sites.*
11. *To attract local airlines investments.*

Most tourists visiting Kenya require visas. These visas can be a barrier to tourism especially where there are restrictions. For example, visas for nationals from some African countries have considerable restrictions, which put significant limitations on the development of regional tourism.

4.3.3   *Railway and Port Services*

4.3.3.1   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.

4.3.3.2   The standard gauge railway (SGR) has revolutionized railway transport and facilitates fast movement of tourists.

4.3.3.3   All cities still lack railway system that could facilitate city tours and easy transport of tourists.

4.3.3.4   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 is currently developing a Cruise ship terminal at the moment Port of Mombasa.

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. *Provide a regulatory framework to ensure safe operations of water vessels used in tourism activities.*
7. *Provide incentives for investment in water passenger vessels, ferries and leisure boats.*
8. *Develop supportive innovative projects such as underground rail tunnels*

4.3.4   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*

4.3.5   Water and Electricity

4.3.5.1   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.

4.3.5.2   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.*

4.3.6   *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 endeavor to:

1. *Establish a well-equipped independent Tourism Protection Service to provide safety and security of host and visitors in tourism areas.*

2. *Establish a National Tourism Crisis Management Center and consolidate existing crisis centers into one.*

3. *Government in consultation with stakeholders will encourage compliance by all the visitors to recognized health standards*

4. *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.*

5. *To develop and implement food safety and hygiene standards.*
6. *Ensure appropriate tourism sector safety guidelines, procedures and measures are developed and implemented.*
7. *Encourage tourists and investors to take insurance covers.*
8. *Establish and strengthen Tourism Sector Safety, Communication and Crisis Management Centre through public/private partnership in every tourism circuit.*
9. *Develop and implement a Code of Conduct for tourism practitioners*
10. *Develop and implement the Tourism Crisis Management Strategy*
11. *Enhance safety and security, tourism disaster preparedness and resilience.*

4.3.7 *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.*

4.4   *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.

4.4.1   *International Tourism*

4.4.2   *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 which is 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 marketing*
10. *Encourage collection of market information and intelligence to harness targeted marketing*
11. *Embrace joint marketing of the East African community region as a single tourist destination.*

4.4.3   *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 transboundary 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.*

4.4.4   Domestic Tourism

4.4.4.1   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.*

4.5 Investment

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.*

4.4   Tourism Ethics, Quality and Standards

4.4.1 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.

4.4.2 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.*

4.5 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. *Transform Kenya Utalii College into a centre of Excellence in 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*

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

4.7 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.*

4.8 *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.*

4.9 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.*

4.10 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*

5.0 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.

5.1 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.*

5.2 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. *Strengthen Tourism Research Institute.*
6. *Strengthen Utalii College to fulfil its mandate*
7. *Strengthen the Tourism Regulatory Authority as the watchdog that keeps the tourism industry in check within standards to re-engineer destination competitiveness and appeal*

6.0 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.

6.1 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.*

6.2 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'*

6.3 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.*

7.0 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:

7.1 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.*

7.2 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.

7.3 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 1) Directorate of Policy, Research and Innovation 2) Directorate of Tourism Development and Promotion	Policy direction and oversight The responsibilities are specified thus: - ✓ Formulation and implementation of National Tourism policy, legislation and strategy ✓ Development and implementation of National Tourism Blueprint 2030

3) Directorate of Tourism Investment and Finance	✓ 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 analyze 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 consolidates 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.

GLOSSARY OF TERMS

"Ecotourism" refers to responsible travel to natural areas that conserves the environment and improves the well-being of local people.

"Sustainable tourism" means tourism development meeting the needs of present tourists and hosts while protecting and enhancing opportunity for the future.