



REPUBLIC OF KENYA

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

National Tourism Policy

2ND SEPTEMBER, 2024

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ABBREVIATIONS AND ACRONYMN

COVID-19	Coronavirus Disease of 2019
EEMS	Economic, Environmental, and Social Management Systems
GDP	Gross Domestic Product
KICC	Kenyatta International Conventions Centre
KTB	Kenya Tourism Board
KUC	Kenya Utalii College
MICE	Meetings, Incentives, Conventions, and Exhibitions
NEMA	National Environment Management Authority
NTC	National Tourism Council
RTCs	Regional Tourism Councils
SGR	Standard Gauge Railway
MSMEs	Micro, Small and Medium Enterprises
SWAP	Sector-Wise Approach
TIAC	Inter-Agency Tourism Council
TF	Tourism Fund
TFC	Tourism Finance Corporation
TRI	Tourism Research Institute
TSVs	Tourism Service Vehicles
WTTC	World Tourism and Travel Council
UN	United Nation
ERSWEC	Economic Recovery Strategy for Wealth and Employment Creation
TRA	Tourism Regulatory Authority
NGOs	Non-Governmental Organizations
SARS	Severe Acute Respiratory Syndrome
MERS	Middle East Respiratory Syndrome
SMES	Small and Medium Sized Enterprises
TICAD	Tokyo International Conference on African Development
UNCTAD	United Nation Conference on Trade and Development
MTEF	Medium Term Expenditure Framework
KPLs	Key Performance Indicators
MDACs	Ministries Departments Agencies and Counties
SACCOs	Savings and Credit Cooperatives
AFCFTA	African Continental Free Trade Area
TPF	Tourism Promotion Fund
ISO	International Standard Organization
EAC	East African Community
GSTC	Global Sustainable Tourism Council
GTRCMC	Global Tourism Resilience and Crisis Management Centre
BRICS	Brazil Russia India China and South Africa
NTIH	National Tourism Innovation Hub
ICT	Information and Communication Technology
TSV	Tourist Service Vehicle
ETA	Electronic Travel Authorization
CIDPs	County Integrated Plans
PPP	Public Private Partnerships
UNEP	United Nations Environmental Programme

SDGs	Sustainable Development Goals
TPU	Tourism Police Unit
CS	Cabinet Secretary
KNUC	Kenya National Utalii College
KSLH	Kenya Safari Lodges and Hotels

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FOREWARD

The tourism sector in Kenya stands at the threshold of a transformative era occasioned mainly by the Constitution of Kenya, 2010 and emerging issues and trends. The Fourth Schedule of the Constitution of Kenya, 2010 provides for Tourism Policy and development as a function of the National Government. Tourism is a shared function between the two levels of Government with local tourism being a function of the County Governments. The goal of this policy is to transform Kenya's tourism sector to be competitive and sustainable.

However, the sector faces various challenges including health, safety and security, impact of climate change, inadequate infrastructure and technological advancements. The COVID-19 pandemic posed challenges to our tourism sector which provided us with a unique opportunity to rethink, rebuild, and rejuvenate our strategies on resilience and innovation, and adoption of cutting-edge technology to enhance our tourism offerings. The sector has embraced digital solutions and modern infrastructure to improve the visitor experience, safety and well-being of our visitors. This policy recognizes the aspirations and pillars of the Bottom-Up Economic Transformation Agenda. Which advocates for inclusive growth, empowering local communities, and ensures that tourism benefits are shared equitably. This approach aligns with the broader goals on poverty alleviation and socio-economic development. Niche product development, as one of the sector aspirations of BETA recognizes the evolving preferences of independent travellers and commitment to diversifying our tourism products. The niche products include but not limited to eco-tourism, adventure tourism, and cultural tourism health and wellness tourism. By promoting these products, we attract a broader spectrum of visitors and enhance the overall tourism experience.

This policy recognizes domestic tourism as a cornerstone to bridge the seasonality gap occasioned by international tourism low seasons. These can be implemented by, encouraging Kenyans to explore their own country boosting local economies and fostering national unity and patriotism. There has been concerted efforts to make travel within Kenya more accessible and affordable for all citizens and visitors.

Inter-sectorial and stakeholder partnerships and collaboration are essential in the implementation of this policy. Marketing Kenya internationally as a top destination is crucial. This will be undertaken by enhancing Kenya's international marketing efforts to showcase its diverse attractions and rich cultural heritage. In addition, strategic partnerships, targeted campaigns, and innovative promotional strategies will ensure that Kenya remains a top-of-mind destination for travellers worldwide. Travelling to Kenya has been made smooth and convenient by improving visa processes, enhancing connectivity through increased flights and improved infrastructure, and ensuring a welcoming environment for all visitors.

In conclusion, this policy framework is a roadmap for a vibrant and resilient tourism sector that contributes significantly to Kenya's socio-economic development. The policy envisions a transformed tourism sector that is sustainable, inclusive, and globally competitive. With these, a new era will be ushered in for the benefit of all Kenyans and position Kenya as a leading tourism destination.

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PREFACE AND ACKNOWLEDGEMENT

Historically, Kenya's tourism policy journey can be traced back to the formulation of Sessional Paper No. 8 in 1969, which laid down growth targets and strategies for sector development. Subsequent policy documents, including the National Tourism Master Plan of 1995 and the Economic Recovery Strategy for Wealth and Employment Creation (ERSWEC) of 2003, underscored the importance of government support and private sector involvement in tourism growth. However, the sector's growth has not been devoid of challenges. One such major challenge is the health crisis of COVID-19 pandemic underscoring the sectors vulnerability. Against this backdrop, the revision of the Kenya Tourism Policy presents an opportunity to redefine the sector's goals, and objectives in alignment with contemporary realities and future aspirations. The overarching theme of "Transforming Tourism in Kenya" encapsulates the ambition to catalyse innovation, foster sustainability, and enhance competitiveness, positioning Kenya as a premier global tourism destination. Central to this transformation agenda is the recognition of tourism's multifaceted role as a driver of economic growth, environmental stewardship, and social inclusivity. By integrating principles of sustainable development into policy frameworks, we aim to ensure that tourism contributes to the well-being of both present and future generations, while safeguarding our natural and cultural heritage. Moreover, this policy aims at establishing collaboration and partnership, both nationally and internationally. It also brings out the roles of various government agencies, private sector stakeholders, local communities, and development partners locally and internationally. The policy further identifies and leverage collective expertise and resources required to address challenges and seize opportunities of the sector. This policy is guided by the principles of inclusivity, sustainability, and innovation which calls for all stakeholders to actively engage. Together, let us chart a bold and transformative path for Kenyan tourism, one that unlocks its full potential as a catalyst for economic development, cultural exchange, and environmental conservation. Through collective action and unwavering commitment, we can ensure that Kenyan tourism not only survives but thrives in the face of evolving global dynamics. Embarking on this transformative journey underscores the critical importance of effective implementation and monitoring mechanisms for the success of this Policy. Consequently, the policy will delineate clear targets, timelines, and performance indicators, bolstered by robust monitoring and evaluation frameworks. Through diligent tracking of its implementation and period evaluation to ensure accountability, adaptability, and continual improvement of our tourism development. In summary, the review of the Policy, centred on the theme of "Transforming Tourism in Kenya" presents a singular opportunity to chart a new course for the sector's future. Let us unite in the pursuit of this transformative journey, guided by a shared vision and collective resolve to forge a brighter, more resilient future for Kenya's tourism sector.

I wish to acknowledge the committee on Review of the National Tourism Policy, Sessional Paper No. 1 of 2010 and Tourism Act CAP 381 that constituted members from the State Department for Tourism, its Agencies and representation from the Office of the Attorney General who participated in the policy review process by offering technical expertise and provided legal advice, guidance and drafting.

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EXECUTIVE SUMMARY

The evolution of tourism policy in Kenya, from Sessional Paper No. 8 of 1969 to Sessional Paper No. 1 of 2010, underscored a strategic shift towards sustainable development and effective governance in the sector. While successive policies have aimed to foster growth through government intervention and private sector participation, recent challenges like the COVID-19 pandemic have highlighted the sector's vulnerability. Despite setbacks, global tourism shows signs of recovery, with Kenya positioning itself for growth through initiatives outlined in its Vision 2030 blueprint. Key strategies include diversification, domestic tourism promotion, and integration with broader economic agendas such as the Bottom-Up Economic Transformation Agenda. However, persistent challenges like inadequate infrastructure and climate change impacts necessitate policy revisions to align with evolving needs, enhance coordination, and promote innovation for a resilient and competitive tourism sector. The situational analysis reveals a comprehensive legal and institutional framework governing tourism development in Kenya. The Constitution of Kenya, 2010, delineates roles between the National and County Governments, while Sessional Paper No. 1 of 2010 underscores sustainable tourism integration into the economy, leading to the Tourism Act, Cap. 381. Under this Act, various institutions have been established, including the Tourism Regulatory Authority, Tourism Research Institute, and the Tourism Fund. Despite these structures, operationalization challenges persist, notably in the Tourism Protection Service and Tourism Tribunal. Regulations, such as those by the Tourism Regulatory Authority, further refine sectorial operations. Gazette Notice No. 8552 establishes the Mama Ngina Waterfront Management Board, accentuating the multifaceted approach to tourism development and management. The legal and institutional framework governing Kenya's tourism sector requires significant review to adapt to changing global trends and ensure long-term sustainability. Key objectives include realigning legal instruments with the constitution and international obligations, avoiding duplication of functions, strengthening policy oversight, and aligning legislation with emerging tourism trends. Furthermore, the institutional framework needs to address gaps in coordination, overlaps, and duplication of functions to enhance the effectiveness of the State Department for Tourism and its agencies. This includes clarifying roles, restructuring institutions for efficiency, and strengthening State Department of Tourism agencies. Additionally, fostering linkages with other sectors of the economy is crucial for sustainable tourism development, with proposed measures including intergovernmental committees, collaboration with relevant ministries, and leveraging sector-wide approaches for coordinated planning. Key sectors like agriculture, energy, health, education, governance, and environment play integral roles in supporting tourism and vice versa, highlighting the importance of cross-sectorial collaboration. Effective policy implementation hinges on clear stakeholder roles, robust coordination mechanisms, and comprehensive implementation frameworks that integrate state and non-state actors at all levels. This involves reviewing existing legislation, fostering collaboration between national and county governments, and building institutional capacity to ensure the successful execution of the tourism policy. Key stakeholders, including government agencies, private sector players, host communities, Non-Governmental Organisation, and development partners, have distinct roles in promoting sustainable tourism development, ranging from policy formulation and regulation to infrastructure development, marketing, and community engagement. Through concerted efforts and

effective coordination, Kenya can harness its tourism potential to drive economic growth, promote cultural exchange, and protect its natural and cultural heritage for future generation.

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CHAPTER ONE

1.0 BACKGROUND AND INTRODUCTION

1.0.1 Background

The first policy on Tourism was set out in the Sessional Paper No. 8 of 1969. The Policy established growth targets for the sector and further spelt out strategies on the role of Government and encouraged participation by the private sector in tourism development. Successive National Development Plans and other relevant public policy documents including the National Tourism Master Plan of 1995, the Economic Recovery Strategy for Wealth and Employment Creation (ERSWEC) (2003) placed great emphasis on the development of the tourism sector through creation of an enabling environment and maintenance of an open-door policy towards foreign investment in tourism.

Sessional paper No.8 of 1969 was repealed by the sessional Paper No. 1 of 2010 whose goal was to achieve sustainable tourism that contributes to a better quality of life for all people. Further, the Policy provided a framework for integration of tourism sector considerations into the various sectorial policies and national development planning as well as decision making processes. Additionally, it provides the legal and institutional framework for effective coordination and management of the tourism sector.

The development of tourism is anchored on the National development blue print-the vision 2030. The vision identify tourism as one of the drivers of the economic pillar. It envisages tourism to be '*among the top ten long-haul tourist destinations in the world, offering a high-end and diverse and distinctive visitor experience*'.

Vision 2030 identified various tourism developments and flagship projects that include: aggressively developing Kenya's coast by establishing resort cities in two key locations; achieving higher tourist revenue yield by increasing the quality of service and charges in country's premium safari parks, and by improving facilities in all under-utilised parks; creating new high value niche products (e.g. cultural, eco-sports and water-based tourism); attracting high-end international hotel chains; and investing in new conference facilities to boost business tourism.

1.0.2 Introduction

The tourism sector is dynamic and which require consistent and continuous improve to cater for the needs of visitors and other stakeholders. The review of the National Tourism policy is a testament of the myriad changes that have happened over the years.

The tourism sector has continued to experience growth over the years to become one of the largest and fastest growing economic sectors. However, the emergence of the covid-19 pandemic disrupted the steady growth of the sector. The tourism sector (including its direct, indirect, and induced impacts) was one of the world's largest

sectors, accounting for 1 in 4 of all new jobs created, 10.3 percent of all jobs (333 million) in the world and 10.3 percent of global GDP (USD 9.6 trillion). The World Travel and Tourism Council (WTTC) reports that the effect of COVID-19 emphasized the tremendous importance and positive contribution of Travel and Tourism. Further, over the years, the tourism sector 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.

In 2020, 62 million jobs were lost, leaving just 271 million employed across the sector globally. This 18.6% decrease was felt across the entire sector, with Small and Medium Sized Enterprises (SMEs), which make up around 80% of all global businesses in the sector— being particularly affected alongside women, the young and minorities. Despite the challenges presented by the Pandemic, the sector appears to be on its way to full recovery. According to the UN Tourism Barometer, in 2023 global international tourist arrivals grew by 34% as compared to 2022. This represents an 88% recovery rate pre-pandemic numbers. Following a strong rebound in 2023, international tourism is expected to recover pre-pandemic levels in 2024, with initial estimates pointing to 2% growth above 2019 levels.

Tourist arrivals in Africa recovered by 96% to pre-Covid levels where a majority of the arrivals were from the European markets. The outstanding performance positioned Africa as one of the world's fastest-recovering tourism markets, outpacing the Americas (87%) and Asia-Pacific (61%) in returning to pre-crisis visitor levels, as per the UN Tourism Barometer data. In 2020, the sector experienced a dip, with the level of employment standing at 4.6%. However, the sector exhibited a growth trajectory in 2022 with the employment percentage settling at 4.7% and 4.95 for 2023. This growth suggested a more robust recovery, marked by the increased confidence in travel.

In Kenya, the tourism sector recorded an improved performance with international tourist arrivals in 2023 increasing by 31.5% to stand at 1,951,185 as compared to 2022 where arrivals totalled to 1,483,752. In terms of earnings, 2023 inbound earnings grew to Kshs.352.54 billion compared to Kshs 268.09 billion in 2022 indicating a growth of 31.5%. Over the years, Kenya has relied on international tourism with major source markets being Europe and the Americas. However, the unprecedented events in the recent past have brought turbulence in the operating environment necessitating a paradigm shift in the management and development of the sector. This Policy seeks to promote the continental and regional tourism as key drivers to the success of Kenya as a tourist destination.

Domestic tourism has greater potential of propelling Kenya's tourism sector and providing the much-needed cushioning for the sector from external shocks. Domestic tourism supports local and national economies, provides a rationale for infrastructure upgrading, disperses visitors geographically across counties and to least-visited rural areas, bridges the seasonality gap, creates employment opportunities.

The Tourism sector is a strategic enabler to the government's aspirations of Bottom-Up Economic Transformation Agenda (BETA). These aspirations seeks to nurture a tourism ecosystem that supports: Independent travel by young people, secure and quality budget hotels with bed & breakfast facilities; Affordable budget air travel to all parts of the country and safe road travel; Diversify Kenya's tourism by promoting niche market products such as adventure, sports and cultural tourism; well regulated with tourism sector through quality assurance and service excellence; and Diversify source markets with focus on African markets.

1.1 Rationale

The Tourism sector is among the leading foreign exchange earner accounting for 13.1 percent of total exports in 2019 and 5.5 percent of the total employment in Kenya. The sector is instrumental in the socio-economic wellbeing of the Country's citizens with multiplier effects in Agriculture, Trade, Environment, Manufacturing and Infrastructure among others.

There has been a number of significant developments since the adoption of the Tourism Policy, Sessional Paper No.1 of 2010 which have restructured the operating landscape. First, the promulgation of the Constitution of Kenya, 2010 brought a new constitutional dispensation with a different architecture of government with shared responsibility for tourism between the National and County Governments. Secondly, the National Tourism Blue Print 2030 gave policy direction on proper realignment of the tourism sector's aspirations with other sectors of the economy for effective management of the destination.

The policy aims to align to the Governments aspirations which include community empowerment in decision making, to encourage growth of Small and Medium Enterprises (SMES), equip individuals with skills needed to engage in productive economic activities and focus on access to financial resources to kick start economic activities

In addition, the tourism sector experiences challenges arising from political, technological, research economic, financing, safety and security, social and environmental spheres. This calls for adoption of innovative strategies to re-engineer destination appeal to promote resilient and sustainable tourism. The multi-sectorial and multidimensional nature of tourism as well necessitates the need to clarify the roles and responsibilities of various stakeholders to eliminate duplicity in the mandates and operations of institutions.

1.3 Policy Goal, Objectives and Guiding Principles

1.3.2 Goal

Transform tourism in Kenya to be internationally competitive and sustainable

1.3.3 Objectives

The objectives of the policy are to:

- (a) Promote sustainable tourism that enhances economic development, environmental sustainability and encourage community participation.
- (b) Provide legal and institutional framework for effective coordination and management of the tourism sector.
- (c) Facilitate development and implementation of quality tourism standards.
- (d) Integrate tourism sector needs into the relevant sectorial policies, National and County development planning.
- (e) Mobilise resources for sustainable Tourism development and management
- (f) Promote and support the provision of incentives and other economic instruments that enhance investment in the sector.
- (g) Promote tourism products that respond to changes in consumer needs.
- (h) Promote research, innovation and uptake of new technology in the sector.
- (i) Enhance collaboration, cooperation, synergy, partnerships and participation in the tourism sector by all levels of Government and all stakeholders.

1.3.4 Guiding principles

The following guiding principles will underpin this policy:

- a) Good Governance:** this policy will be guided in accordance with principles of good governance as espoused in Article 10(2) c of the Constitution, on Integrity, Transparency and accountability.
- b) Sustainability:** Tourism will be developed and managed in a manner that does not compromise the quality and value of the resource or exceed the carrying capacity of supporting ecosystems
- c) Participatory approach:** A coordinated and participatory approach to tourism development and management will be enhanced to ensure that the relevant government agencies, county governments, private sector, civil society and host communities are involved in planning, implementation and decision-making processes.
- d) The Polluter and User Pays:** The polluter and users of tourism resources will bear the full environmental and social costs of their activities.
- e) Subsidiarity:** The development and management of tourism will be undertaken through decentralisation and devolution of authority and responsibilities to the lowest level possible.

1.4 Scope of Policy

This policy provides a framework for the management and development of tourism. It delineates the roles of National and County Governments and other Stakeholders. In addition, it highlights various tourism products and experiences such as culture, wildlife, marine, business, and eco-tourism. The policy also includes strategies for promoting international, regional and domestic tourism. It focuses on securing financial resources and investments to support tourism infrastructure and development, tourism quality standards, experiences and training of human resources. Furthermore, the policy emphasizes the importance of tourism research and knowledge management, conflict resolution mechanisms and the involvement of local communities in the benefit sharing and support environmental sustainability.

1.5 Structure of the policy

This policy is organized into five chapters; Chapter One provides the background and introduction; Chapter Two provides the situational analysis of the tourism sector; Chapter Three presents Tourism policy statements and interventions; while Chapter Four covers the framework for the implementation of Tourism Policy and Chapter Five outlines the monitoring, evaluation and reporting mechanism. A comprehensive implementation matrix and coordination framework of the Policy are provided in the annex.

CHAPTER TWO

2.0 SITUATION ANALYSIS

This chapter presents the current tourism status that the Policy is seeking to resolve and review trends on the issue. It will also highlight unusual patterns and emerging issues. It also presents the legal and institutional frameworks, regional and international frameworks, and lessons learnt.

2.1 Current Tourism Status and Trends

2.1.1 Current Tourism Status

Tourist Arrivals and Earnings

The policy review indicates significant achievements and positive trends in the sector, which have been made possible by the collective efforts of all stakeholders. The tourism sector, a beacon of resilience, has shown significant improvement in tourist arrivals, from 1.1 million visitors in 2010 to 2.086 million in 2023. Tourist earnings grew from Kshs. 73 billion in 2010 to 353 billion in 2023, and bed-night occupancy increased from 3.4 million in 2010 to approximately 6.6 million in 2023. The COVID-19 pandemic, however, disrupted this positive trajectory. In the heart of COVID-19 pandemic in 2020, the country received only 567,000 tourists, as the global health crisis severely impacted international travel and tourism, highlighting the sector's vulnerability to global disruptions.

Tourism Quality Standards and Incentives

The previous policy intended to review and reform the structure, criteria, and system for standards in tourism to enhance the destination competitiveness. As a result, hotel facilities have been classified using the East Africa Community classification criteria and eighteen (18) National minimum standards developed. In addition, the incentives for investment in tourism products and services, facilitated by the Tourism Regulatory Authority (TRA), such as tax incentives to enable compliance to quality standards were processed. During the same policy implementation period, the Government provided economic stimulus to enhance the tourism product value and appeal.

Product Development

Product development and diversification was implemented through projects such as the Mama Ngina Waterfront and the Cruise Terminal in Mombasa. Refurbishment and modernization of the KICC, feasibility study and master planning of the Nairobi International Convention Centre (NAICC) was also undertaken. This demonstrates the critical role of multi-stakeholder collaboration in driving the sectors growth.

Tourism Research

The Sessional Paper no. 1 of 2010 proposed the establishment of a National Tourism Research Agency to undertake and coordinate tourism research. This was achieved by establishing the Tourism Research Institute. The policy also sought to develop and implement harmonized tourism data collection, processing and reporting standards.

Despite the above efforts, there still exists inconsistencies in reporting. Another important goal was to create a comprehensive tourism database at all management levels to support planning, product development, marketing and decision-making. There is progress towards its achievement. Additionally, the National Tourism Information Management System (NTIMS) has been developed. The development of the East Africa Tourism Barometer is ongoing.

Tourism Marketing and Promotion

The Policy proposed several strategies to boost the country's tourism sector and position Kenya as a premier tourist destination. One of the interventions focused on enhancing and promoting public-private partnerships and collaborations for marketing and branding Kenya. Notable initiatives include the Magical Kenya Expo, MICE international Expos and events. Another policy intervention was to improve coordination between marketing agencies. The Electronic Travel Authorization (ETA) was also designed to streamline tourist visa issuance while maintaining national security. This policy led to a notable increase in tourist arrivals in the first half of 2024, with an average of 22% increase in half-year performance, illustrating the positive impact of reducing bureaucratic barriers on travel.

Tourism Training and Development

On tourism training and development, the policy sought to enhance Kenya's tourism sector through better training and development. One key intervention was to promote the development of well-trained personnel. This led to the introduction of Technical and Vocational Education and Training (TVET) in tourism based on Competency-Based Education and Training (CBET) and Competency Development and Assessment Centers (CDAC). Additionally, the intervention focused on developing a comprehensive curriculum and standards for the hospitality and tourism industry. This policy created a new curriculum reflecting the need for continuous alignment with industry requirements to keep training relevant and effective.

To improve access to training opportunities, the government introduced a system of scholarships through revolving fund loans through the Tourism Fund (TF). Consequently, TF has developed a framework for a revolving fund, an example of good governance in financial management that supports mechanisms to facilitate education and training. The policy also aimed to expand national hospitality and tourism training facilities, leading to the establishment of Ronald Ngala College at the Kenya Coast.

Legal and Institutional Framework

On the legal and institutional framework, the Government had envisioned a comprehensive tourism law to be put place to consolidate all the existing tourism-related legislation to regulate the sector. Despite the non-operationalization of the Kenya National Convention Bureau due to a lack of legal framework, other institutions such as Kenya Tourism Board (KTB), Tourism Fund (TF), Tourism Regulatory Authority (TRA), Tourism Research Institute (TRI), Kenyatta International Convention Center (KICC), Kenya Utalii College (KUC), and Tourism Finance Corporation (TFC) were

created through the enactment of the Tourism Act CAP 381. Tourism Promotion Fund Regulations of 2019 created a new institution called Tourism Promotion Fund (TPF)

2.1.2 Tourism Trends

Technology integration in the sector continues to revolutionize the travel industry, from online accommodation booking, payments and itinerary planning to enhance the travel experience. Advances in artificial intelligence, augmented reality, and virtual reality have transformed how travellers research, book, and engage with destinations.

The rise of remote work and digital nomadism has transformed traditional notions of travel and work. As more people embrace location-independent lifestyles, the sector has adapted to accommodate this new breed of travellers with co-working spaces, digital nomad-friendly accommodations, and community-oriented experiences.

Younger generations are reshaping the travel landscape with their preferences for authentic and socially conscious experiences. These have been greatly influenced by social media. As these digital natives come of age, their influence on travel trends, technology adoption, and destination choices will only grow.

The sharing economy has transformed the accommodation sector, with online booking platforms offering seamless travel destinations.

Globally, the climate is changing, resulting in direct impacts on the environment. Destinations are susceptible to climate-related events such as droughts and floods, which pose a serious threat to the country's socio-economic development.

There is growing recognition that tourism has some negative environmental impacts that are more severe in crowded attractions for example, beaches, coral reefs, marine species, and natural landscape are more vulnerable. Therefore, a clear policy direction is necessary for mitigating the adverse impacts and enhancing sustainable tourism practices.

2.2 Review of Legal and Institutional Framework

The Constitution of Kenya 2010 in its fourth schedule sets out functions of the National and County Governments in tourism. It provides the functions of the National Government as Tourism policy and development while the County Government is given the function of trade development and regulation including local tourism.

As at 2010 tourism legislation was fragmented into several Acts of Parliament, however in 2011 these laws were consolidated into the Tourism Act (Cap 381) as per the recommendations of the sessional paper No.1 of 2010 which sought to mainstream tourism concerns into all sectors of the economy.

2.3 Review of the Institutional Framework

The current institutional framework of the State Department for Tourism has been restructured into three directorates namely: Tourism Research, Policy and Innovation, Tourism Development and Promotion, Tourism Finance and Investment. Further, in the implementation of the tourism policy, the Tourism Act (CAP 381) was enacted in 2011, to provide for development, management, marketing and regulation of sustainable tourism and tourism-related activities and services. Under this Act, nine

institutions have been established namely; Tourism Regulatory Authority, Kenya Utalii College, Tourism Protection Service, Kenya Tourism Board, Tourism Research Institute, Kenyatta International Conference Centre, and Tourism Fund, Tourism Finance Corporation and Tourism Tribunal.

The *Public Finance Management (Tourism Promotion Fund) Regulations, 2019* established Tourism Promotion Fund which is an institution mandated to provide funding to support tourism development and promotion

2. Regional and International Frameworks

This Policy is aligned with regional and international standards, frameworks, best practices, and commitments to promote sustainability and international competitiveness. Key frameworks include:

- i. United Nations Tourism:** Adherence to UN-Tourism guidelines, recommendations, and initiatives promoting sustainable tourism development, cultural heritage preservation, and destination management.
- ii. African Union Agenda 2063:** Alignment with the AU Agenda 2063 objectives for promoting intra-African tourism, regional integration, and sustainable economic development through tourism.
- iii. East African Community (EAC) Tourism Protocol:** Compliance with the EAC Tourism Protocol provisions aimed at facilitating cross-border tourism, harmonising tourism policies, and enhancing regional cooperation in tourism development.
- iv. Global Sustainable Tourism Council (GSTC) Criteria:** Integration of GSTC criteria for sustainable tourism into policy formulation, planning, and implementation processes to ensure environmental, socio-cultural, and economic sustainability.
- v. International Standards Organization (ISO) Standards:** Adoption of ISO standards related to tourism services, quality management, environmental management, and health and safety to enhance tourism product quality and visitor satisfaction.
- vi. Global Tourism Resilience and Crisis Management Centre (GTRCMC):** Collaboration with GTRCMC initiatives and programmes aimed at enhancing destination resilience, crisis preparedness, and risk management in the face of global challenges such as pandemics, natural disasters, and security threats.
- vii. United Nations 2030 Agenda for Sustainable Development (SDGs):** The SDGs spell out the seventeen (17) areas that require the governments attention, organizations, and individuals to collaborate and work towards a more equitable, resilient and sustainable future for all. Especially: SDG number 8 Promote sustained, inclusive and sustainable economic growth; SDG Number 12 Ensure sustainable consumption and production patterns; SDG 13 Climate action; SDG 15 Protect, restore and promote sustainably use of terrestrial ecosystem; SDG 17 Partnerships for the goals.

viii. **UN Environment Programmes (UNEP):** This deals with finding solutions to the triple planetary crisis of climate change, nature and biodiversity loss, and pollution and waste.

2.5 Lessons Learnt

Several critical lessons have emerged from reviewing Sessional Paper No.1 of 2010 on enhancing sustainable tourism. The shortcomings and successes that influence effective policy making have been examined. This reflective approach ensures that future policies are more robust, inclusive, and capable of driving sustainable growth and development in tourism. consequently, the following lessons were learnt in the implementation of tourism policy: **Tourism Products:** The destination overly depends on two major traditional nature based Tourism products, namely; beach and wildlife safari. There is need to diversify to other niche products.

- i. **Resilience and Adaptability:** The COVID-19 pandemic underscored the importance of robust resilience and adaptability strategies in the tourism sector to navigate unforeseen global crises. It highlighted the need for proactive contingency planning and the implementation of flexible business models. The pandemic also emphasized the essential role of health and safety protocols, with travellers increasingly favouring destinations that demonstrated stringent hygiene practices and comprehensive safety measures.
- ii. **Value of Domestic Tourism:** The pandemic highlighted the strategic value of domestic tourism as a vital alternative revenue stream during periods of international travel disruption. Strengthening domestic tourism diversifies income sources and supports local economies when international tourism and travel is affected.
- iii. **Role of Specialized Regulatory Institution:** Establishing a specialized regulatory institution has proven essential for setting and maintaining industry standards. Their role in ensuring consistent and high-quality outcomes is crucial and should be further reinforced to uphold industry integrity, performance and growth.
- iv. **Tourism Research:** Adequate funding and human resources are crucial for advancing tourism research. They ensure that research methodologies are robust, consistent, and reliable. Tourism studies can yield meaningful insights and drive sector improvements with sufficient support. Adequate investment in these areas fosters high-quality research outcomes.
- v. **Success of Infrastructure Projects:** The success of large-scale tourism infrastructure projects underscores the necessity of multi-stakeholder collaboration, transparency, accountability, and effective governance. These elements drive major tourism ventures' successful expansion and enhancement.
- vi. **Legal Support for Tourism:** Strong legal frameworks are fundamental for establishing robust tourism institutions, significantly enhancing a destination's competitiveness. Adequate legal support underpins the development of resilient and efficient tourism structures that enhance the sector's growth.

- vii. **Regional Collaboration:** Collaboration, peace, and integration are crucial in expanding market base and for harmonizing and standardizing regional tourism development issues.
- viii. **Power of Collaborative Marketing:** Effective destination branding relies on robust public-private partnerships. Collaborative marketing initiatives, especially international events, significantly boost a destination's visibility and appeal. These joint ventures illustrate how synergistic efforts elevates a destination's profile in the international market.
- ix. **Elimination of travel barriers:** Streamlining visa procedures, such as through Electronic Travel Authorization (ETA), can significantly increase tourist arrivals by simplifying entry and reducing travel barriers. Efficient visa systems reduce bureaucratic obstacles while maintaining security, striking a crucial balance that fosters tourism growth and attracts more visitors.
- x. **Tourism Training and Development:** The implementation of Technical and Vocational Education and Training (TVET) in tourism, based on Competency-Based Education and Training (CBET) and Competency Development and Assessment Centers (CDAC), demonstrates the value of accessible and affordable training. Such initiatives cultivate an avenue for self-employment and a pool of highly qualified professionals, strengthening Kenya's tourism sector and supporting sustainable development.
- xi. **Competency Development for the tourism sector:** Developing new curriculum and standards in collaboration with industry stakeholders highlights the necessity of aligning educational programs with current industry needs. Continually updating curricula ensures that training remains relevant and effectively addresses the evolving requirements of the hospitality and tourism sector. Different curricula within the tourism sector need harmonization to enable ease of credit transfer and, continuous re-skilling.
- xii. **Technology Integration and Adoption:** Technology integration in the travel industry has significantly transformed the sector. Advances in artificial intelligence, augmented reality, and virtual reality are enhancing how travellers research, book, and engage with destinations. This evolution highlights the need for continuous technological adoption to stay competitive.
- xiii. **Influence of Younger Generations:** Younger generations influence travel trends with their preferences for authentic, socially conscious, and visually appealing experiences. As these generations age, their influence on travel technology adoption and destination choices will grow. The industry must consider these preferences to attract and retain this demographic.
- xiv. **Environmental Impacts of Tourism:** There is growing recognition of the negative impacts of tourism on the environment. Pollution, destruction of coral reefs, and degradation of vegetation are among some of the pressing issues. Developing and implementing clear policies for mitigating these adverse impacts and promoting sustainable tourism practices is essential.

Impact of Climate Change on Tourism: Climate change has adverse effects on the tourism sector. These have been exacerbated by prolonged droughts, floods, and rising sea levels. In order to mitigate these effects there is need for a concerted effort to adopt and adapt sustainable mitigation measures in the sector.

DRAFT POLICY 2024

CHAPTER THREE

3.0 TOURISM POLICY STATEMENTS

3.1 Overview

The Chapter presents the policy issues and the various interventions that the Policy seeks to address.

3.2 Tourism Products and Experiences

Kenya has previously relied on the wildlife safari and beach tourism as her core products and services which do not meet the ever-changing demands of consumer preferences and experiences. There are unexploited and underdeveloped products including sports, adventure, culture and heritage, Health tourism, bird watching, ecotourism, community-based tourism, local arts and crafts, agro tourism, rare creatures, cuisine, shopping and entertainment, honeymoon and weddings, surfing, desert safari, and retirement among others. In order to increase Kenya's competitiveness, there is a need to develop, diversify tourism product and experiences portfolio to include niche products in all parts of the country.

3.2.1 Culture and Heritage Tourism

Culture and Heritage tourism has the potential to improve the economic vitality of numerous Kenyan Communities, broaden Kenya's tourism base, preserving traditions and value. It also improves awareness and appreciation of our physical and intangible heritage as well as impacting on the social development of any given destination and gives authenticity to our tourism experiences. There is growing concern about the future of the culture and heritage tourism in Kenya as it is underdeveloped with minimal efforts to preserve and sustain it.

There is need to embrace a realm of cultural tourism planning to ensure growth of high-quality cultural heritage tourism products and experiences. To achieve this, the National Government will:

1. Support mechanisms for the development of cultural tourism infrastructure.
2. Harness the packaging of cultural tourism experiences in all circuits for visitors While preserving our cultural legacy for future generations.
3. Secure, promote, package and authenticate cultural heritage from the diverse Kenyan communities.
4. Develop and implement cultural heritage tourism strategy.
5. Support cultural ambassadors' programs.

3.2.2 The Wildlife Safari

Kenya being pioneer for the wildlife safari where the authentic experience resides, it is the unique selling point and backbone for the Kenya's tourism sector. The continued land degradation activities in the country are however asserting a negative in growth of wildlife safari due to an accelerated decline in wildlife population and disturbance of wildlife. To enhance the wildlife safari products and tap into the growing niche market, the National Government will:

1. Implement strategies to revamp the wildlife safari product and experiences;
2. Empower host communities in the management of protected areas;
3. Develop adventure and wilderness tourism;
4. Strengthen edutainment experiences.

3.2.3 Marine and Beach Tourism

Kenyan tourism beach destination bears the footprints for Kenya's tourism sector catering for domestic, regional and international visitor. The beach and marine resources accommodates as many tourists as are available both at the coast and inland waters creating unique opportunity to increase tourism. The unexploited beach tourism coupled with inadequate conservation of the marine ecosystems are hindering recreational activities opportunities at the beaches.

In order to increase marine and beach tourism without infringing regard for sustainability, the National Government will:

1. Review and implement strategies to strengthen beach nodes for resilient and sustainable tourism.
2. Enhance Strategic beach waterfronts for enhanced tourism experience.
3. Support the branding, promotion and marketing of the marine and beach products.
4. Support strategic tourism beach management, and rescue infrastructure

3.2.4 Business Tourism

Business tourism is one of the fastest growing tourism segments globally and mainly delivered through components of Meetings, Incentives, Conferences and Exhibitions/Events (MICE).

In Kenya, business tourism plays an important role and acts as a linkage with leisure tourism; it has also immensely contributed towards the growth and development of cities and urban centers through the multiplier effect. However, there is slow uptake of MICE as part of tourism marketing mix to promote business tourism. In order to boost economic growth, revenue and job creation across the value chain for the business tourism, *the National Government will:*

1. Establish the National Convention Bureau to promote *MICE* business for the country;
2. Promote *MICE* tourism locally, regionally and internationally;
3. Invest in *MICE* infrastructure across the country to support expand business tourism.

3.2.5 Eco- Tourism, Nature and Scenic Tourism

Eco-tourism prioritizes the conservation of natural habitats and bio diversity while Nature and scenic tourism depend on conserved habitats and, fosters community empowerment. Modern tourists are increasingly seeking for Eco-tourism to connect with nature on a deeper level providing opportunities for authentic eco-environment for personal reflection, relaxation, rejuvenation, nature and scenic experiences.

These allows them to unwind and reconnect themselves with the surroundings. Destruction of natural habitats and in adequate exploitation of this potential product has denied opportunities for growth of this sector. In order to conserve, exploit and *enhance* eco-tourism and scenic tourism products. The National Government will:

1. Support the development of eco-tourism, nature and scenic tourism across the country;
2. Provide visitor information and interpretive strategies and policies;
3. Profile, package and promote iconic habitats and eco-tourism destinations for enhanced visitations by visitors.

3.2.6 Sports Tourism

Kenya is known for global leadership in athletics, particularly long-distance segment. Sports tourism is one of the fastest growing sectors of tourism. Although, more and more tourists are getting interested in various sporting activities during their travel, Kenyan sports tourism is unexploited. In order to promote sports tourism, the National Government will:

1. Establish and implement collaboration frameworks for sports tourism;
2. Support branding and marketing of sports and sporting events both locally and Internationally to promote sports tourism;
3. Develop and implement Kenya's sport tourism strategy.

3.2.7 Health and Wellness Tourism

Health and wellness is a growing segment of the travel industry and travellers are increasingly seeking destinations which promote relaxation, rejuvenation, and self-care through spa retreats, wellness resorts, or immersive nature experiences. Medical tourism is a type of tourism activity which aims to improve and balance all of the main domains of human life including physical, mental, emotional, occupational and intellectual.

There exists potential for wellness and medical tourism in the Kenya supported by existence of specialized hospitals, wellness infrastructure, hotels, with enhanced transport infrastructure.

In order to promote the health and wellness tourism, the National Government will:

1. . Support the development and provide incentives for investment in modern and state of art health and wellness facilities
2. Profile, package and promote health and wellness tourism in the country.
3. Support the development of health and wellness tourism products and experiences.
4. Develop a health and wellness tourism strategy in collaboration with stakeholders.
5. Establish/ Review National Policy and frameworks, and adopt best practices for regulating the health and wellness tourism
6. Collaborate with stakeholders and adopt advanced technologies and cost effective treatments
7. Strengthen Health and wellness value chains amongst stakeholders
8. Promote and protect environmental, socio-economic and cultural assets in health and wellness tourism
9. Build capacity of workforce on health and wellness tourism

3.2.8 Adventure Tourism

Adventure tourism is increasingly becoming popular among youths and independent travelers looking for challenging and unique experiences. Northern Kenya is characterized by wild and rugged terrain that provides a desert adventure and historical experience. This tourism when fully harnessed and packaged has potential to attract both local and international tourism. To harness the adventure tourism potential, the *National Government will:*

1. Support development of infrastructure and convenient amenities along adventure and desert circuits;
2. Profile, package and promote adventure and desert tourism in the Country;
3. Promote safety and security measures of the tourists in the adventure and desert circuits;
4. Support development of adventure tourism products and experience in conjunction with the host community and other stakeholders.

3.3 Tourism Promotion, Marketing and Branding

As a tourism destination, Kenya has many competitive advantages to leverage on. The focus on branding, promotion and marketing Kenya is to present the destination experiences both locally and internationally. Effective destination branding relies on

robust public-private partnerships. Collaborative marketing initiatives, especially international events, significantly boost a destination's visibility and appeal. These joint ventures illustrate how synergistic efforts elevates a destination's profile in the international market.

There is a weak linkage among sector stakeholders, uncoordinated efforts towards marketing the destination, and low uptake of digital destination marketing. Moreover, there is lack of representation in the overseas tourism source markets to provide timely information and respond to concerns arising from the international space about Kenya as a tourism destination. This calls for integrated and coordinated approach to marketing and branding Kenya as a preferred tourist destination.

In order to strengthen the destination competitiveness, tourism promotion, marketing, branding and enhance growth in **international tourism**, the National Government will:

1. Diversify the new source markets which include Africa, and other emerging markets;
2. Collaborate with the private sector in development, promotion and marketing the country as a premier tourist destination;
3. Strengthen national tourism marketing agency responsible for promotion and market;
4. Deploy tourism attachés in Kenyan foreign missions;
5. Promote use of on-line and digital marketing platforms;
6. Develop guidelines for visitors on transit.

To enhance growth in **regional tourism**, the National Government will:

1. Support regional policies dealing with tourism development, promotion and marketing;
2. Adopt strategies for joint marketing of Africa and East African community as a single tourist destination;
3. Support elimination of barriers on visa and travel restrictions for bona fide visitors within the region.

To enhance growth in **domestic tourism**, the National Government will:

1. Develop a domestic Tourism Strategy;
2. Collaborate with the county government to establish Inter-County Regional Boards and Councils to harmonize the tourism functions at the national and county level;
3. Promote and support domestic tourism promotional activities;
4. Collaborate with the County government to enhance capacity on domestic tourism;
5. Create awareness on domestic tourism to Kenyan nationals to increase travel to under visited sites;
6. Promote investment in budget-priced tourism facilities.

7. *The government in collaboration with stakeholders promote affordable tourism to cater for wider market segments of youth and independent travellers*

3.4 Tourism Investments and Resource Mobilization

Tourism investment is capital intensive that requires financing mechanisms that is affordable, with low interest rates, easily accessible and sustainable. Strengthened tourism sector will diversify income sources and supports local economies.

Development of tourism products and infrastructure facilities, marketing of destination, and capacity development has been affected by inadequate financing coupled with high interest rates that hinders investments. Government has therefore not fully utilized the potential of tourism industry due to limited resources devoted to development and promotion of the sector.

Unless tourism is prioritised as a vital revenue stream for the economy and the necessary plans, policies, actions and resource allocated to support this initiative are put in place, tourism will continue to be a missed opportunity. Therefore, there is need to complement existing funds and re-engineer the funding models by harnessing additional funding to address the sector's funding requirements.

a) Tourism Investment

To increase tourism investments and promote funding and resource mobilization in The National Government will:

1. Provide an enabling and conducive business environment for investment in the tourism sector;
2. Profile and promote investment opportunities in the sector;
3. Promote Public Private Partnership (PPP) and joint ventures for tourism development;
4. Establish an incentive framework to support and attract investment in the sector while enhancing geographical spread of tourism facilities across the country
5. Support development of local franchises for tourism development;
6. Support the linkage of local hotel chains with international hotel brands for destination visibility and appeal;

b) Funding and Resource Mobilization

In order to promote funding and resource mobilization in the tourism sector, the National Government will,

1. Restructure institutions responsible for tourism financing;
2. Strengthen the existing Funds to support the tourism sector;
3. Mobilise additional resources from development partners and donors to complement tourism development;
4. Broaden the revenue and funding base to ensure the financial sustainability of tourism sector.

3.5 Strengthen Policy, Legal and Institutional Frameworks

Adequate policy and regulatory frameworks are requisite in providing guidance on the national and county tourism and other governance structures in the tourism sector. The review of the Tourism Policy has been necessitated by the need to align with the requirement of the Constitution of Kenya 2010 and evolution of the sector.

The existing frameworks are inadequate therefore hindering effective achievement of the intended objectives for the sector. Sound policy, legal and Institutional framework will be critical in guiding and enhancing operations, management and maintenance of tourism sector. In order to strengthen the Policy legal and institutional frameworks, the National Government will;

1. Review the Tourism Act Cap 381
2. Realign and clarify the functions of the State Department and its Agencies.
3. Strength the technical Directorates of the State Department for Tourism.
4. Strengthen and clarify roles of existing Tourism Public Funds for efficient and effective utilization of funds.
5. Strengthen the State Department's Tourism Agencies to effectively carry out their mandate
6. Strengthen the role of the State Department for Tourism by establishing Tourism Regional offices.
7. Strengthen the role of the State Department of Tourism by posting Tourism Officers to strategic Kenyan Missions abroad.

3.6 Tourism Quality Standards

Standards are essential catalysts in enhancing destination competitiveness. Their role in ensuring consistent and high-quality outcomes is crucial and should be further reinforced to uphold industry integrity, performance and growth. This improves the economic, social and environmental management of the destination thus ensuring sustainable development.

Under-performance of the tourism sector has been exacerbated by factors such as low uptake of tourism quality standards and gaps in the regulatory framework. This has further curtailed responsiveness to the country's marketing efforts leading to below optimal tourist numbers and low market share of international tourist arrivals. It is therefore critical to enhance compliance to tourism quality standards to enhance destination competitiveness and growth.

To achieve this objective, the National Government will: -

1. Ensure the development and implementation of standards for the tourism sector;
2. Strengthen regulatory mechanisms to improve compliance to tourism quality standards;
3. Enhance regulation of tourism and hospitality training institutions and sector workforce for quality service delivery;
4. Strengthen monitoring and assessment of tourism activities and services for continuous improvement and adherence to principles of sustainable tourism;
5. Ensure adoption of renewable energy and circular economy guidelines for hospitality and tourism enterprises to enhance sustainability;
6. Develop and Implement codes of practice to enhance self-regulation.
7. Rationalize and review the licensing and fee charges.

3.7 Tourism Human Resource Development and Training

The success of the tourism sector and ultimately of the destination depends on the quality of human capital. Tourism is a labor-intensive sector and therefore has a potential to substantially contribute to the labor market. However, the market needs of the sector are not in line with the skills and knowledge acquired during the trainings. The mismatch between the sector needs and the training has affected the quality of services rendered to the tourists/visitors.

In order to improve workforce capability and stay abreast of trends and development in tourism labor market, the National Government will:

1. Standardize workforce development in the tourism sector;
2. Establish and operationalize a reference bureau for the tourism sector workforce;
3. Expand access to quality hospitality and tourism training;
4. Develop and implement a Tourism Sector Human Resource Strategy;
5. Promote exchange programs to enhance Tourism Sector competencies;
6. Promote scholarship programs to increase access to training;
7. Promote youth skills transfer and mentorship programs in the sector;
8. Facilitate capacity building of small, micro and medium enterprises and emerging entrepreneurs in tourism.

3.8 Tourism Research, Innovation and Knowledge Management

Research is a vital component of tourism development. Sound, credible and timely, tourism research provides insights to help the tourism destination remain competitive. Research and innovation support development of diverse tourism products and matching strategies for product packaging and marketing and also enhances evidence-based decision making. The emergence of digital space requires relooking at the uptake of modern technology to commensurate changes in delivery and consumption

of tourism products across the value chain. Advances in artificial intelligence, augmented reality, and virtual reality are enhancing how travelers research, book, and engage with destinations. Further, Knowledge management is important in creating value for the tourism sector. This will involve initiatives, processes, strategies, and systems that sustain tourism's knowledge assessment and sharing.

The tourism sector has; inadequately invested on knowledge management, robust researches on the products and has experienced slow uptake of new technology. Such inadequacies have resulted to sector hiccups in delivery of competitive products. In order for the sector to stay competitive and deliver an end-to- end digital tourism and travel experiences the National Government will:

1. Strengthen agencies in charge of National Tourism Research;
2. Coordinate and undertake tourism research and tourism information management;
3. Establish mechanism for submission of data by regulated tourism enterprise;
4. Establish and operationalize National Tourism Innovation Hub (NTIH) to support talent and knowledge management in the tourism sector;
5. Collaborate with relevant institutions to provide data and information for the tourism sector.

3.9 Conflict Resolution Mechanism

The tourism sector encounters disputes, complaints, and arbitration and litigation matters from tourism stakeholders that requires timely resolutions. In order to resolve disputes and other related complaints, *The National Government will:* operationalize the Tourism Tribunal.

3.10 Collaboration and Partnership with County Governments

Tourism attractions and facilities are located in all the counties. 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. There are challenges in coordinated process of planning, designing, managing and implementation of local tourism activities between the two levels of Governments. Clear coordination frameworks are required to support development and management of local tourism. To achieve this, the National Government will:

1. Establish tourism intergovernmental coordination frameworks and mechanisms for collaboration with County Governments;
2. Support County Governments to provide necessary tourism infrastructure;
3. Provide technical assistance to Counties on tourism development and marketing;
4. Support Counties to establish and maintain Tourism Information Centers;
5. Review the existing tourism circuits.

3.10 Tourism Enablers and Climate Change

3.10.1 Infrastructure

Competitiveness of a tourism destination heavily relies on the availability and quality of the infrastructure as an enabler. Opportunities exist in the development of; transport industry and cruise and water-based tourism in both coastal and inland water bodies. Inadequate infrastructure, have severely limited mobility, international and domestic inter-connectivity and the participation of rural communities in the tourism industry. In addition, the absence of adequate infrastructure services hinders participation in the industry by potential suppliers of products and services, and as tourists themselves. 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.

The National Government in collaboration with the relevant institutions will invest in development of appropriate infrastructure for tourism development to ensure seamless travel experiences for visitors.

a) Road transport

The National Government will:

1. *Advocate for collaborative infrastructure development by forging partnerships with relevant stakeholders to enhance tourism-related facilities;*
2. Support the upgrade, rehabilitation and maintenance of access roads to tourism circuits;
3. Ensure Implementation of regulations, guidelines and measures for licensing Tourist Service Vehicles (TSVs) and operators;
4. Support the development of convenient facilities along the tourism circuits' roads.

b) Air Transport

The National Government will:

1. Support the modernization and expansion of airports and airstrips;
2. Support the security and communication network of airstrips along the tourism circuits;
3. Promote for competitive airport service charges, taxes and aviation fuel cost to attract more international and regional air operators;
4. Re- engineer the processing of the Electronic Travel Authorisation (ETA);
5. Promote inter-regional airlines connectivity;
6. Support collaborative, bilateral and multilateral agreements on air travel;
7. Promote adherence to operation standards for all aircrafts and balloons;
8. Provide incentives to attract more international, domestic, budget airlines and charter flights.

c) Railway and Port Services

The National Government will:

1. Support expansion of the SGR network in Kenya and link to neighbouring countries in the region;
2. Support the introduction of dedicated premium train services for tourists;
3. Support public-private partnership investments in railway trams and city tour buses;
4. Incentivize initiatives towards transforming coastal and inland water ports to international and regional hub for cruise tourism;
5. Review cruise tourism strategy and develop supporting Infrastructure;
6. Support the development of innovative projects.

d) Communication and ICT

Communication and ICT plays a vital role in the growth and development of tourism sector. It facilitates effective distribution of tourism information and products. Adoption and fast uptake of modern and innovative ICT technologies can strategically position the destination. In Kenya, the uptake of modern communication technologies

is relatively low compared to other competing destinations. In order to facilitate uptake and adoption of modern ICT technologies in the sector;

The National Government will:

1. Support provision of internet access and connectivity in all tourism circuits;
2. Promote digitization of services and e-tourism platform;
3. Enhance ICT skills development amongst the tourism workforce;
4. Establish an integrated communication system in the tourism sector;
5. Promote smart tourism initiatives

e) 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 and coverage in Kenya has remained high and is characterized with frequent outages. This has greatly affected the operations and service delivery in hospitality and tourism sector. In order to facilitate attainment of clean and reliable water and electricity in the tourism sector the National Government will:

1. Support the provision of clean water supply and sewerage services in all tourist areas;
2. Promote recycling of water and appropriate disposal of waste;
3. Promote adoption and use of renewable energy by tourism enterprises;
4. Incentivize investment in alternative sources of energy;
5. Support affordable connectivity of electricity, water and sewerage services to tourism sites;
6. Support peaceful coexistence among communities and tourism investors as regards shared natural resources.

f) Health, Safety and Security

Safety, security and health factors are key determinants in the choice of travel destination by visitors. Tourism practitioners are expected to provide safe, secure and hygienic conditions so as to attract visitors.

In this regard, it is vital that every effort is made to foster and maintain an environment that provides assurance to visitors and host communities of their safety and security. To achieve this, the National Government will:

1. Enhance health, safety and security in the tourism sector;
2. Promote safety and security of hosts and visitors in tourism areas;
3. Establish National Tourism Crisis Management Centre;
4. Establish the National Tourism Crisis Steering Committee
5. Develop and implement health, hygiene standards and protocols for tourism sector;

6. Develop and implement tourism sector safety guidelines, procedures and measures;
7. Promote acquisition of insurance covers by tourists and investors.

g) Environmental Sustainability

Tourists increasingly seek sustainable travel options. Kenya's ecotourism initiatives and focus on conservation attracts this growing market. Responsible tourism practices like wildlife conservancy programs offer visitors a chance to experience Kenya's natural beauty while contributing to its preservation

To achieve this, the National Government will:

1. Support decarburization strategies in the tourism operations
2. Promote use of electric tourism vehicles to reduce carbon emissions for transport related to tourism
3. Establish green incentives on tourism investments
4. Establish environmental reporting deadlines on sustainable tourism to tourism operators
5. Support hotel waste reduction and recycling programs and establish frameworks to monetize those programs

h) Media and publicity

Most times the local and international media coverage concentrates on the negative image of the destination since the greater percentage of their coverage highlights issues on cattle rustling, violence, street protest, riots, and demonstrations among others. This is in spite of the positive developments happening in Kenya as a peaceful country. This imbalance reporting impacts travel and tourism sector significantly. Efforts to counter this negative publicity must be enhanced through timely and accurate communication by the relevant agencies.

In order to address this, the Government will:

1. Develop mechanisms for timely and accurate communication

CHAPTER FOUR

4.0 FRAMEWORK FOR IMPLEMENTING THE POLICY

2.1 Coordination framework and Administrative Mechanisms

This policy will be coordinated and administered by the Cabinet Secretary Ministry of Tourism and Wildlife and the Principal Secretary State Department for Tourism. State Agencies established by the Tourism Act (Cap 381) are also responsible for the implementation of this policy.

The implementation of this National Tourism Policy 2010 and the Tourism Act CAP 381 has identified gaps which include weak oversight and coordination, overlaps and duplication of functions. In this regard, there is need to rationalize the functions of the State Department and the institutions under it.

Administrative Mechanism

This policy will be administered by the structures of the State Department for Tourism, collaborating institutions and proposed new structures as listed below

INSTITUTIONS	ROLE
State Department for Tourism	overall oversight and coordination of the sector
Tourism Regulatory Authority	Regulate the tourism sector
Kenya National Utalii College (KUC)	Undertake tourism and hospitality training
Tourism Research Institute (TRI)	Coordinate and Conduct research for the tourism sector
Kenya Tourism Board (KTB)	Market the country as a leading destination both locally, regional and internationally

Kenyatta International Convention Centre (KICC)	Promote and market KICC as a premier conference facility.
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National Convention Bureau	Promote and market MICE tourism in local, regional and international markets.
Tourism Fund (TF)	Collect and disburse funds for the Tourism sector
Tourism Promotion Fund (TPF)	Finance Tourism promotion and development
Tourism Police Unit (TPU)	Offer safety and security to tourists and tourist installations, and support the enforcement of tourism laws.
County Governments	Development of Local tourism
Mama Ngina Waterfront	This is a Tourism Product whose funding and support shall be coordinated by the sponsoring/ lead department
National Tourism Crisis Steering Committee	Coordinate crisis matters in tourism sector.
National Tourism Crisis Management Centre	To create policies relevant to research, guidelines, and projects designed to enhance destination preparedness management and recovery from crisis.
Tourism Society of Kenya	To bring together Tourism professionals at various levels and sub-specialisation
Institute of Tourism Professional Development	Continuous learning and professional development
Tourism Sector Association (TSA)	Support self-regulation, mobilize and bring Tourism Stakeholders together

County Governments

The County Governments will be responsible for the development of Local tourism through:

1. Develop County policies on local tourism.
2. Develop and diversify competitive tourism products in the county.
3. Develop community –based tourism projects and programs.
4. Develop partnerships between the county governments and the stakeholders in tourism matters.
5. Implement bilateral, multilateral, regional and international agreements in tourism.
6. Develop strategies for attracting tourism investments in the county.
7. Market and promote Counties as tourism destinations.
8. Conduct tourism research.
9. Undertake resource mobilization.
10. Implement and maintain nationally accepted standards of tourist service.

Role of Tourism Stakeholders

Tourism is multi-disciplinary and multi- sectorial sector which requires collaboration with other stakeholders such as, Ministries, State agencies, County Governments, Non- State actors, private sector, communities, academic institutions, constitutional commissions, independent bodies, faith-based bodies organizations, among others who are responsible for the implementation of this policy.

Development partners will also be involved at different levels to provide support for policy implementation. Each stakeholder will have specific roles outlined to contribute to the successful implementation of the tourism policy. These roles may include funding, regulatory oversight, infrastructure development, marketing and promotion, community engagement, training, product development, international relations and sustainable tourism practices.

To address this, the Ministry in collaboration with stakeholders will:

1. Establish intergovernmental tourism committees to coordinate tourism activities between national, county governments and the private sector.

2. Collaborate with the State Department for Devolution and Inter-Governmental Relations Committee through the established tourism sector fora.
3. In consultation with the Ministry responsible for Environment to develop and implement framework for measuring the impacts of climate change on the tourism sector
4. Establish and operationalize the National Tourism Crisis Steering Committee, in liaison with the Attorney General's (AG) Office to coordinate crisis matters in tourism sector.
5. In liaison with the Global Tourism Resilience and Crisis Management Centre - Eastern Africa to create policies relevant to research, guidelines, and projects designed to enhance destination preparedness management and recovery from crisis.
6. In collaboration with the Judiciary, operationalize the Tourism Tribunal to handle sector litigation issues.
7. In consultation with the National Police Service, operationalize the Tourism protection unit to handle safety and security matters in the tourism sector.
8. In collaboration with the Ministry responsible for Investment promotion identify and profile bankable and feasible investments that will benefit the tourism sector.
9. In collaboration with the Ministry of Cooperatives and MSMEs Development capacity build Micro, Small and Medium Tourism Enterprises to form SACCOs for ease of access to financing and advocacy.
10. In partnership with research bodies and academia provide information and knowledge for evidence-based decision making.
11. In partnership with National Treasury, Development partners, and Non-State Actors, enhance resource mobilization for tourism development.
12. Collaborate with international, regional and sub-regional tourism bodies for cooperation, agreements, capacity building, marketing and initiatives relevant to tourism development.

Private Sector

The role of the private sector will be to:

1. Provide tourism facilities and services to travelers;
2. Investment in tourism development;
3. Lobby the Government for proper policies and legislation to facilitate sustainable tourism development;
4. Adhere to sound principles and practices of sustainable tourism;
5. Form sector associations to enhance self-regulation and professionalism;

6. Collaborate with Government through Public Private Partnerships (PPP) in the development of tourism
7. Participate in destination marketing and investment conferences
8. Deploy innovation and technology in tourism development

Host Communities

The role of the host Communities will be to:

1. Serve as Cultural tourism ambassadors.
2. Offer a range of services to tourists, including accommodation, dining, guided tours, and souvenirs.
3. Protect their natural surroundings as they often rely on them for tourism activities and livelihoods.
4. Foster mutual understanding, tolerance, and appreciation of different cultures to break down stereotypes and promote peace and harmony.
5. Be involved in tourism planning and decision-making to empower them to shape the development of their communities.

NGOs and Civil Society

The role of the NGOs and Civil Society will be to:

1. Support communities' participation in tourism development;
2. Capacity build communities to enhance their participation in tourism development; and
3. Lobby government for laws and regulations to enhance sustainable tourism development

Development Partners

The role of Development Partners will be to:

1. Provide funding for tourism development
2. Provide technical assistance and capacity building

2.2 Legal and Regulatory Framework

The existing laws that are aligned to this policy include:

- The Tourism Act Cap 381 and its Regulations

- Public Finance Management (Tourism Promotion Fund) Regulations, 2019
- Wildlife Conservation and Management Act Cap 376
- Environmental Management and Coordination Act Cap 387
- The Climate Change Act Cap 387A
- Kenya Citizens and Foreign Nationals Management Service Act No. 31 of 2011
- Kenya Institute for Public Policy Research and Analysis Act, No. 15 of 2006

In this Policy, the relevant international conventions and treaties have been domesticated to supplement its implementation. They include:

- i. **UN- Tourism** that provides framework for sustainable, responsible and ethical tourism development
- ii. **EAC Treaty** which includes Regional Integration and collaboration, joint marketing and promotion, classification and standardisation, investment and infrastructure development, capacity building and research.
- iii. **African Union 2063 Agenda on tourism**

4.2 Funding Arrangements

The Ministry will allocate financial resources to coordinate the implementation of the tourism policy. Similarly, MDACs will be required to provide budgetary allocations to implement initiatives under this policy.

The Ministry will leverage on the existence of the two funds namely Tourism Promotion Fund (TPF) and Tourism Fund (TF) to facilitate the implementation of the initiatives and interventions contained in the policy.

CHAPTER FIVE

5.0 MONITORING AND EVALUATION MECHANISM

5.1 Overview

This chapter presents the framework for monitoring, evaluation and reporting of the Policy.

5.2 Monitoring Framework

Monitoring implementation of the Policy constitutes systematic tracking of activities and actions to assess progress of implementation of the set policy interventions towards achievement of the Ministry's mandate. It will involve measuring progress against specific targets set in a timely and effective manner to help identify opportunities and challenges, allowing for timely corrective measures if necessary, ensuring prudent use of resources and achievement of targets.

The various departments will undertake continuous monitoring of the implementation of these targets and provide quarterly reports this is aimed at ensuring that policies are being implemented, performance measured, progress reports are prepared and discussed and then corrective action taken where necessary.

The Ministry will be responsible for data collection for the respective policy interventions. The standards for tracking performance for the Policy shall be outlined. This will include defining the Key Performance Indicators (KPIs) identify outcomes, outputs and efficiency levels. This will be followed by documenting best practices at the Mid-term and End-term reviews and dissemination of the findings to all stakeholders for decision making.

5.3 Evaluation Framework

Evaluation of the implementation of the Policy will be conducted through Mid-term and End-term reviews. However, ad hoc reviews will also be initiated during the implementation period on need basis. The evaluation process will start with the establishment of a baseline indicators for expected outcomes. This evaluation will be conducted by incorporating external evaluators to enhance objectivity. The evaluation indicators will be developed to assess the policies effectiveness, impact and sustainability. The report generated will be used to review the programs/activities in order to achieve the goals set in the Policy on time.

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5.4 Reporting Framework

Regular reporting at all levels will be done on annual basis in terms of annual reports. This will ensure a repository of knowledge that provides a basis of problem solving and innovation, growth and sustainability of policy interventions. Monitoring and Evaluation Reports will be useful to various stakeholders, key among them being the Ministry for decision making.

5.5 Feedback and Learning

The Ministry will develop a feedback mechanism to inform and get views from stakeholders. Additionally, the Ministry will capture the lessons learnt and feed into adjustments and improvement of the necessary corrective interventions in the policy. Measurements of actual performance will be made at predetermined times and compared with the performance standards. If the actual results fall outside the planned targets, action will be taken to correct the deviation. The action will not only correct the deviation but also prevent its recurrence.

5.6 Review of the Policy

Mid-Term Review: Mid-term review of the Policy will be carried out in the fifth year of implementation of the policy. Its aim is to evaluate the five and a half (5.5) year's activities effective date of the launch and indicate the extent to which the Ministry has implemented the Policy. (Amend to include changing constitution and other emerging issues)

End-Term Review: End-term review will be carried out in the tenth-year effective date of launch. The objective is to enumerate results and document lessons learnt. The review results will be used during the next policy planning cycle.

CHAPTER SIX

6.0 IMPLEMENTATION FRAMEWORK

DRAFT POLICY 2024

Interventions	Activity	Expected Output	Key Performance Indicators	Estimated Cost (Millions)	Responsibility
Tourism Products and Experiences.					
Policy Goal:	Culture and Heritage Tourism				
Intervention 1: Harness the packaging of cultural tourism experiences in all circuits for visitors while preserving our cultural legacy for future generations;	Identify and package the cultural tourism experiences	Well packaged cultural experiences	Number of cultural experiences packaged	40	Tourism Development and Promotion
Intervention 2: Secure, promote, package and authenticate cultural heritage from the diverse Kenyan communities;	Package tourism products	Increased tourism heritage	No of tourism heritage initiated	50	Tourism Development and Promotion
Intervention 3: Develop and implement cultural heritage tourism strategy	Formulate the heritage tourism strategy	An operational tourism strategy plan	No of strategies developed	20	Tourism Development and Promotion
Intervention 4: Support cultural ambassadors' programmes;	Held forums with cultural ambassadors	An improved tourist sites	No of programmes supported	15	Tourism Development and Promotion
Policy Goal:	The Wildlife Safari.				
Intervention 1: Implement strategies to revamp the wildlife safari product and experiences	Formulate and implement strategies	Revamped wildlife safari products and experiences	No of strategies implemented	15	Tourism Development and Promotion

Interventions	Activity	Expected Output	Key Performance Indicators	Estimated Cost (Millions)	Responsibility
Intervention 2: Empower host communities in the management of protected areas	Held empowerment forums	Empowered community	No of community for a held	20	Tourism Development and Promotion
Intervention3:Develop adventure and wilderness tourism	Increased tourism earnings	Increased niche market	% level of completion	50	Tourism Development and Promotion
Intervention4:Strengthen edutainment experiences	Develop more edutainment experiences	Increased tourist	No of edutainments developed	5	Tourism Development and Promotion
Policy Goal:	Marine and Beach Tourism.				
Intervention 1:Review and implement strategies to strengthen beach nodes for resilient and sustainable tourism	Review the existing strategies	Strengthened beach nodes	Number of strategies reviewed	23	Tourism Development and Promotion
Intervention2:Enhance Strategic beach waterfronts for enhanced tourism experience	Develop and modernize the beach	An operational beach	% level of completion	75	Tourism Development and Promotion
Intervention 3:Support the branding, promotion and marketing of the marine and beach products	Market the marine products	Increased tourists arrivals	No of campaigns held on marketing	20	Tourism Development and Promotion

Interventions	Activity	Expected Output	Key Performance Indicators	Estimated Cost (Millions)	Responsibility
Intervention 4:Support strategic tourism beach management and rescue infrastructure	Develop the rescue Centre	Improved accessibility to centre	% level of completion	75	Tourism Development and Promotion
Policy Goal:	Business Tourism.				
Intervention1:Establish the National Convention Bureau to promote MICE business for the country	Develop the Convention Bureau	An operational convention bureau	% level of completion	500	Tourism Development and Promotion
Intervention 2: Promote MICE tourism locally, regionally and Internationally	Renovate KICC	Improved conference facilities	% level of completion	80	Tourism Development and Promotion
Intervention 3: Invest in MICE infrastructure across the country to support expand business tourism	Identify and develop convection centres	An operational convention centres	% level of completion	800	Tourism Development and Promotion
Policy Goal:	Eco-Tourism, Nature and Scenic Tourism.				
Intervention 1: Support the development of eco-tourism, nature and scenic tourism across the country	Identify and map viewpoints	An operational viewpoints	No of viewpoints developed	75	Tourism Development and Promotion
Intervention 2: Provide visitor information and interpretive strategies and policies	Formulate the strategy plan	An operational policy	No of beneficiaries	5	Tourism Development and Promotion

Interventions	Activity	Expected Output	Key Performance Indicators	Estimated Cost (Millions)	Responsibility
Intervention 3: Profile, package and promote iconic habitats and eco-tourism destinations for enhanced visitations by visitors	Profile and package iconic habitats	An increased tourism site	No of habitats promoted	20	Tourism Development and Promotion
Policy Goal:	Sports Tourism.				
Intervention1:Establish and implement collaboration frameworks for sports tourism	Formulate the collaboration framework	An operational framework	No of frameworks developed	10	Tourism Development and Promotion
Intervention 2: Support branding and marketing of sports and sporting events both locally and Internationally to promote sports tourism	Identify and market the sports and sporting events	Improved sport tourism	No of sports and sporting events marketed	5	Tourism Development and Promotion
Intervention 3:Develop and implement Kenya's sport tourism strategy	Develop the strategy	An operational policy	No of strategies developed	10	Tourism Development and Promotion
Policy Goal:	Health and Wellness Tourism.				
Intervention 1: Support the development and provide incentives for investment in modern and state of art health and wellness facilities	Identify and develop the hospital facilities	Enhance tourism earning and arrivals	No of hospital facilities identified	250	Tourism Development and Promotion
Intervention 2: Profile, package and promote health and wellness tourism in the country	Identify and promote	Enhance tourism	No of facilities identified	30	Tourism Development and Promotion

Interventions	Activity	Expected Output	Key Performance Indicators	Estimated Cost (Millions)	Responsibility
		earning and arrivals			
Intervention 3: Support the development of health and wellness tourism products and experiences.	Identify and develop	Enhance tourism earning and arrivals	No of products identified	50	Tourism Development and Promotion
Intervention 4:Develop a health and wellness tourism strategy in collaboration with stakeholders	Formulate the strategy	An operational policy	No of strategies developed	15	Tourism Development and Promotion
Intervention 5:Establish/ review national policy and frameworks and adopt best practices for regulating the health and wellness tourism	Review national policy on health and wellness tourism	An operational policy	No of policies reviewed	6	Tourism Development and Promotion
Intervention 6: Collaborate with stakeholders and adopt advanced technologies and cost effective treatments	Identify and map health stakeholders	Enhanced health and wellness tourism	No of stakeholders engaged	3	Tourism Development and Promotion
Intervention 7:Strengthen health and wellness value chains amongst stakeholders	Train the stakeholders about health and wellness tourism	Enhanced health and wellness tourism	No of stakeholders engaged	20	Tourism Development and Promotion

Interventions	Activity	Expected Output	Key Performance Indicators	Estimated Cost (Millions)	Responsibility
Intervention 8: Promote and protect environmental, socio-economic and cultural assets in health and wellness tourism	Identify the cultural assets in health and wellness tourism	Enhanced health and wellness tourism	No of assets identified and promoted	16	Tourism Development and Promotion
Intervention 9:Build capacity of workforce on health and wellness tourism	Capacity build on the health work force	Enhanced health and wellness tourism	No of health workforce trained	34	Tourism Development and Promotion
Policy Goal:	Adventure Tourism.				
Intervention 1:Support development of infrastructure and convenient amenities along adventure and desert circuits;	Identify the facilities to be improved	Improve accessibility	No of facilities improved	105	Tourism Development and Promotion
Intervention 2: Profile, package and promote adventure and desert tourism in the Country	Identify and cluster the products to be packaged	Enhance tourism earnings	No of iconic adventure tourism products developed	80	Tourism Development and Promotion
Intervention 3: Promote safety and security measures of the tourists in the adventure and desert circuits	Establish tourist police units	Improved coexistence	No of tourist police units established	30	Tourism Development and Promotion
Intervention 4: Support development of adventure tourism products and experience in conjunction with the host community and other stakeholders	Identify and cluster the products to be developed	Enhance tourism earnings	No of products developed	45	Tourism Development and Promotion
Tourism Promotion, Marketing and Branding					

Interventions	Activity	Expected Output	Key Performance Indicators	Estimated Cost (Millions)	Responsibility
Policy Goal:	International Tourism.				
Intervention 1: Diversify the new source markets which include Africa, and other emerging markets	Identify the new source markets	Increase tourists arrivals	No of new markets identified	60	Tourism Development and Promotion
Intervention 2: Collaborate with the private sector in development, promotion and marketing the country as a premier tourist destination	Formulate marketing strategy	Increase tourists arrivals	% level of implementation	39	Tourism Development and Promotion
Intervention 3: Deploy tourism attachés in Kenyan foreign missions	Nominate and appoint tourism attaches	Increase tourists arrivals	No of tourism attachés deployed	2	Tourism Development and Promotion
Intervention 4: Promote use of on-line and digital marketing platforms	Develop the on-line and digital marketing platform	Increase tourists arrivals	No of users	15	Tourism Development and Promotion
Intervention 5: Develop guidelines for visitors on transit	Formulate the guidelines	Increase tourists arrivals	No of tourist visitors		Tourism Development and Promotion
Policy Goal:	Regional Tourism.				
Intervention 1: Adopt strategies for joint marketing of Africa and East African community as a single tourist destination	Develop the strategies	Increase tourists arrivals	No of strategies developed	10	Tourism Development and Promotion

Interventions	Activity	Expected Output	Key Performance Indicators	Estimated Cost (Millions)	Responsibility
Intervention 2: Support elimination of barriers on visa and travel restrictions for bona fide visitors within the region	Adopt visa free movement for tourists	Increase tourists arrivals	No of tourists recorded	7	Tourism Development and Promotion
Policy Goal:	Domestic Tourism.				
Intervention 1: Develop a domestic Tourism Strategy	Formulate the policy	Enhance tourism earning arrivals and	No of strategies formulated	15	Tourism Development and Promotion
Intervention 2: Collaborate with County Governments to establish Inter-County Regional Boards and Councils to harmonize the tourism functions at the national and county level	Engage council of Governors	Increase coexistence	No of agreement signed	35	Tourism Development and Promotion
Intervention 3: Promote and support domestic tourism promotional activities	Held forums locally	Increase the domestic tourism	No of activities promoted	45	Tourism Development and Promotion
Intervention 4: Collaborate with the County Governments to enhance capacity on domestic tourism	Engage County Governments	Enhance tourism earning arrivals and	No of MoUs signed	30	Tourism Development and Promotion
Intervention 5: Create awareness on domestic tourism to Kenyan nationals to increase travel to under visited sites	Create a campaign strategy in the County Governments	Enhance tourism earning arrivals and	No of local tourists recorded	45	Tourism Development and Promotion

Interventions	Activity	Expected Output	Key Performance Indicators	Estimated Cost (Millions)	Responsibility
Intervention 6: Promote investment in budget-priced tourism facilities	Develop funding proposals	Enhanced tourism earnings	Amount of funds outsourced	35	Tourism Development and Promotion
Tourism investment and Resource Mobilization.					
Policy Goal:	Tourism Investment				
Intervention 1: Profile and promote investment opportunities in the sector	Develop investment proposals	Enhance tourism earning and arrivals	Amount of funds outsourced	5	Tourism Investment and Finance
Intervention 2: Promote Public Private Partnership (PPP) and joint ventures for tourism development	Identify and engage donors and private investors	Enhance tourism earning and arrivals	No of PPPs and Joint ventures signed	4	Tourism Investment and Finance
Intervention 3: Establish an incentive framework to support and attract investment in the sector while enhancing geographical spread of tourism facilities across the country	Identify and implement the incentives	Enhance tourism earning and arrivals	No of incentives developed	7	Tourism Investment and Finance
Intervention 4: Support development of local franchises for tourism development	Identify and develop the local franchise	Enhance tourism earning and arrivals	No of local franchises developed	76	Tourism Investment and Finance

Interventions	Activity	Expected Output	Key Performance Indicators	Estimated Cost (Millions)	Responsibility
Intervention 5: Support the linkage of local hotel chains with international hotel brands for destination visibility and appeal	Develop the linkage framework	Promote the coexistence	No of frameworks developed	10	Tourism Investment and Finance
Policy Goal:	Funding and Resource Mobilization.				
Intervention 1: Restructure institutions responsible for tourism financing	Develop restructure roadmap with clear ToRs	Effective and efficient use of resources	Amount of funds disbursed.	5	Tourism Investment and Finance
Intervention 2: Strengthen the existing Funds to support the tourism sector	Develop the allocation formula	Effective and efficient use of resources	Absorption rate of development funds	6	Tourism Investment and Finance
Intervention 3: Mobilize additional resources from development partners and donors to complement tourism development	Develop funding proposals	Increase tourism investment	No of funding proposals developed	4	Tourism Investment and Finance
Intervention 4: Broaden the revenue and funding base to ensure the financial sustainability of tourism sector	Identify and approach donors and development partners	Increase tourism investment	No of donors engaged	5	Tourism Investment and Finance
Policy Goal:	Strengthen Policy, Legal and Institutional Frameworks				

Interventions	Activity	Expected Output	Key Performance Indicators	Estimated Cost (Millions)	Responsibility
Intervention 1: Review the Tourism Act Cap 381	Review the Tourism Act Cap 381	Aligned to the existing Tourism legislations.	An approved reviewed Tourism Act Cap 381	12	Tourism Research, Policy and Innovation
Intervention 2: Strengthen the role of State Department for Tourism by establishing regional offices	Establish Regional offices	Enhanced service delivery	No of offices established	70	Tourism Research, Policy and Innovation
Policy Goal:	Tourism Quality Standards.				
Intervention 1: Ensure the development and implementation of standards for the sector.	Develop standards	Standards developed/reviewed and implemented	No. of standards developed/reviewed and implemented	1,500	SDT/Tourism Regulatory Authority
Intervention 2: Strengthen regulatory mechanisms to improve compliance to tourism quality standards.	Development of regulatory guidelines	Regulatory mechanisms strengthened	Reviewed regulations; Enforcement framework	150	SDT/Tourism Regulatory Authority
Intervention 3: Enhance regulation of tourism and hospitality training institutions and sector workforce for quality service delivery.	Formulate regulations	Regulation of training institutions and sector workforce enhanced	Training institutions and sector workforce regulations; enforcement framework	450	SDT/Tourism Regulatory Authority

Interventions	Activity	Expected Output	Key Performance Indicators	Estimated Cost (Millions)	Responsibility
Intervention 4: Strengthen monitoring and assessment of tourism activities and services for continuous improvement and adherence to principles of sustainable tourism.	Develop monitoring and assessment tool	Monitoring and assessment strengthened	Monitoring and assessment tools; % of implementation	1,550	SDT/Tourism Regulatory Authority
Intervention 5: Ensure adoption of renewable energy and circular economy guidelines for hospitality and tourism enterprises to enhance sustainability.	Develop guidelines	Renewable energy and circular economy guidelines adopted by the sector	% of adoption of renewable energy and circular economy guidelines by the sector; sustainability reporting regulations	1,200	SDT/Tourism Regulatory Authority
Intervention 6: Develop and Implement codes of practice to enhance self-regulation	Develop code of practice	Codes of practice developed and implemented	No. of Codes of practice developed; % of tourism sector players subscribing to the codes of practice	800	SDT/Tourism Regulatory Authority
Policy Goal:	Tourism Human Resource Development and Training				
Intervention 1: Expand access to quality hospitality and tourism training	Open more Tourism training campuses	Enhance Tourism trainees	No of campuses established	90	Tourism Development and Promotion

Interventions	Activity	Expected Output	Key Performance Indicators	Estimated Cost (Millions)	Responsibility
Intervention 2: Develop and implement a Tourism Sector Human Resource Strategy	Develop and implement a Human Resource Strategy	Foster partnerships and promote practical skills development	% level of implementation	2	Tourism Development and Promotion
Intervention 3: Promote exchange programs to enhance Tourism Sector competencies	Develop exchange program framework	Foster partnerships and promote practical skills development	No of beneficiaries	4	Tourism Development and Promotion
Intervention 4: Promote scholarship programs to increase access to training	Outsource for scholarship	Foster partnerships and promote practical skills development	No of beneficiaries	3	Tourism Development and Promotion
Intervention 5: Promote youth skills transfer and mentorship programs in the sector	Develop training manuals	Foster partnerships and promote practical skills development	No of beneficiaries	8	Tourism Development and Promotion
Policy Goal:	Tourism Research and Knowledge Management.				
Intervention 1: Coordinate and undertake tourism research and tourism information management	Develop tourism research and information management	Enhanced policy formulation	% level of implementation	10	Tourism, Research, Policy and Innovation

Interventions	Activity	Expected Output	Key Performance Indicators	Estimated Cost (Millions)	Responsibility
		and data driven decisions			
Intervention 2: Establish and operationalize National Tourism Innovation Hub (NTIH) to support talent and knowledge management in the tourism sector;	Develop a NTIH	Enhanced policy formulation and data driven decisions	% level of completion	50	Tourism, Research, Policy and Innovation
Intervention 5: Collaborate with relevant institutions to provide data and information for the tourism sector.	Hold consultative forums	Increased tourism earnings	No of forums held	5	Tourism, Research, Policy and Innovation
Policy Goal:	Collaboration and Partnership with County Governments				
Intervention1: Establish tourism intergovernmental coordination frameworks and mechanisms for collaboration with County Governments	Formulate the coordination framework	Increase tourism earnings and arrivals	No of Counties collaborated	10	Tourism Development and Promotion
Intervention 2: Support County Governments to provide necessary tourism infrastructure	Identify the infrastructure facilities	Increase tourism accessibility	No of facilities improved	75	Tourism Development and Promotion
Intervention 3: Provide technical assistance to Counties on tourism development and marketing	Develop marketing strategy tool	Increase tourism	No of Counties engaged	23	Tourism Development and Promotion

Interventions	Activity	Expected Output	Key Performance Indicators	Estimated Cost (Millions)	Responsibility
		earnings and arrivals			
Intervention 4: Support Counties to establish and maintain Tourism Information Centres	Develop the tourism Information Centres	Increase tourism earnings and arrivals	% level of completion	41	Tourism Development and Promotion
Intervention 5:Review the existing tourism circuits	Review the existing tourism circuits	Increase tourism earnings and arrivals	% level of completion	30	Tourism Development and Promotion
Tourism Enablers and Climate Change					
Policy Goal:	Road Transport				
Intervention 1: Support the upgrade, rehabilitation and maintenance of access roads to tourism circuits	Rehabilitate and maintain access roads to tourism circuits	Increase accessibility to tourism circuits	No of Kms of access roads rehabilitated and maintained	87	Tourism Development and Promotion
Intervention 2: Support the development of convenient facilities along the tourism circuits' roads	Identify and develop facilities	Increase accessibility to tourism circuits	No of facilities developed	100	Tourism Development and Promotion
Policy Goal:	Air Transport				
Intervention 1: Provide incentives to attract more international, domestic, budget airlines and charter flights.	Provide the incentives	Increase tourism	No of tourists recorded	78	Tourism Development and Promotion

Interventions	Activity	Expected Output	Key Performance Indicators	Estimated Cost (Millions)	Responsibility
		earnings and arrivals			
Policy Goal:	Communication and ICT				
Intervention 1: Promote digitization of services and e-tourism platform	Digitize tourism services	Increase tourism earnings and arrivals	No of tourism services digitized	45	Tourism Development and Promotion
Intervention 2: Establish an integrated communication system in the tourism sector	Establish e-tourism platform	Increase tourism earnings and arrivals	% level of completion	34	Tourism Development and Promotion
Policy Goal:	Water and Electricity				
Intervention 1: Promote adoption and use of renewable energy by tourism enterprises	Develop the guidelines for adoption and use of renewable energy	Clean environment	No of enterprises promoted	45	Tourism Development and Promotion
Policy Goal:	Health, Safety and Security				
Intervention 1: Establish National Tourism Crisis Management Centre	Construct National Crisis Management Centre	An operational Centre	% level of completion	79	Tourism Development and Promotion
Intervention 2: Establish the National Tourism Crisis Steering Committee	Appoint the National Tourism Crisis Steering Committee	Reduced conflicts	Committee reports	3	Tourism Development and Promotion

Interventions	Activity	Expected Output	Key Performance Indicators	Estimated Cost (Millions)	Responsibility
Policy Goal:	Environmental Sustainability				
Intervention 1: Support decarbonization strategies in the tourism operations	Develop decarbonization strategies	Clean environment	% level of completion	12	Tourism Development and Promotion

7.0 ANNEXES

7.1 KEY POLICY DEFINITIONS

“Business Tourism” means a tourism activity in which visitors travel for a specific professional and/or business purposes to a place outside their workplace and residence with an aim of attending a meeting, an activity or an event.

“Compliance Certificate” means a document that denotes compliance to national minimum standards issued by the Sector Regulator under the provisions of the law.

“Cultural tourism” means a type of tourism activity in which the visitor's essential motivation is to learn, discover, experience and consume the tangible and intangible cultural attractions/products in a tourism destination.

“Domestic Tourism” means tourism activities involving residents traveling within their country.

“Ecotourism” means a type of nature-based tourism activity in which the visitor's essential motivation is to observe, learn, discover, experience and appreciate biological and cultural diversity with a responsible attitude to protect the integrity of the ecosystem and enhance the well-being of the local community.

“Inter-ministerial collaborations” means consultations between and among ministries on matters relating to tourism.

“Local Tourism” means local communities engaging in tourism activities within their county

“Responsible tourism” means tourism that maximizes the benefits to local communities, minimizes negative social or environmental impacts, and helps local people conserve fragile cultures and habitats or species.

“Sector workforce” means all persons either employed or self-employed providing services in the tourism sector

“Sustainable tourism” refers to practices that take full account of the current and future economic, social and environmental impacts, addressing the needs of visitors, the sector, the environment and host communities.

“Stakeholder” means, a person, group, or organization involved in or affected by the tourism sector;

“Tourism” refers to the movement of people to countries or places outside their usual environment for personal or business/professional purposes.

"Tourism sector", refers to the cluster of production units in different industries that provide consumption goods and services demanded by visitors.

"Tourist" refers to a person travelling to and staying in a place outside his or her usual abode for more than twenty-four hours, but not more than one consecutive year, for leisure, business or other purpose, not being a work-related activity remunerated from within the place visited.

"Tourism product" means a good or service which contributes to the total visitor or tourist experience in a tourism destination area.

"Inter-ministerial collaborations" refers to consultations between relevant ministries on matters relating to tourism.

"Government" refers to both levels of Government, National and County.

"Edutainment" refers to the combination of education and entertainment.

7.2 COORDINATION FRAMEWORK

