

REPUBLIC OF KENYA



MINISTRY OF TOURISM

WORKING DOCUMENT

DRAFT REVISED NATIONAL TOURISM POLICY, 2016

ON

ENHANCING SUSTAINABLE TOURISM IN KENYA

FOREWORD

Tourism remains the cornerstone of the economy, and a leading foreign exchange earner for the country. Moreover, the sector has high multiplier effects as its growth stimulates further development in other activities. The industry accounts for over 10% of total employment, contributes 9% to GDP; 18% Foreign Exchange earnings and is a major source of Government revenue at 11% in form of taxes, duties, licence fee, park entry fee etc.

This review of the policy is timely five years since it was formulated, key institutions established and critical lessons learnt. The objective of this review is to accelerate the re-engineering of the sector, clarify and consolidate the roles of various agencies, including national and county governments and strengthen the role of the private sector. This will facilitate the continued development of an economic and environmentally sustainable and spatially balanced tourism sector, through taking cognisance of the internal and external change in environment since the promulgation of the Kenya Constitution 2010 which ushered a new dispensation including two levels of government with distinct but dependable roles, a new governance architecture and an empowered citizenry.

More recent, the 2015 Tourism Recovery Task Force Report identified areas that needed to be strengthened or changed. This, together with increase funding, stakeholder support, enterprise development and capital investment have underpinned recovery and growth in the industry. It is therefore timely to commence a review of tourism policy to enhance this growth and include emerging tourism issues in major documents including SDG, EA, IGAD, IORA and Climate Change.

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

Chapter one underscores the importance and contribution of the tourism sector to the local and national economy and employment creation. This

section also highlights the existing policy instruments and the rationale for a Revised National Tourism Policy.

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

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

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

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

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

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

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

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

Hon. Najib Balala, EGH
CABINET SECRETARY

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ACRONYMS AND ABBREVIATIONS

COMESA	Common Market for Eastern and Southern Africa
TF	Tourism Fund
DFI	Development Financial Institution
DoT	Directorate of Tourism
DTCK	Domestic Tourism Council of Kenya
EAC	East African Community
EIA	Environmental Impact Assessment
EMS	Environmental Management System
ERSWEC	Economic Recovery Strategy for Wealth and Employment Creation
E-Tourism	Electronic Tourism
GDP	Gross Domestic Product
HIV/AIDS	Human immunity Virus/Acquired Immuno-Deficiency Syndrome
HRA	Hotels and Restaurants Act
IATA	International Air Transport Association
ICAO	International Civil Aviation Organization
KICC	Kenyatta International Convention Centre
KTB	Kenya Tourist Board
KTFC	Kenya Tourism Finance Corporation
KUC	Kenya Utalii College
MICE	Meetings, Incentives, Conferences and Exhibitions
MSF	Multi-Stakeholder Forum
NEMA	National Environment Management Authority
NTIMS	National Tourism Information Management System
SWAP	Sector-Wide Approach
TPS	Tourist Protection Service
TSV	Tourism Service Vehicles
UFTAA	Universal Federation of Travel Agents Associations
UNWTO	United Nations World Tourism Organization

1.0 INTRODUCTION

1.1 Background/ (to be Updated)

1.1.1 Kenya's environment and natural heritage is unique. From pristine beaches, snow-capped mountain to varied landscapes such as the Rift Valley, lake basins, forests and vast savannah and rangelands beaming with wildlife to cultural diversity, makes it a country of contrasts. The natural heritage and the people are vital key drivers of Kenya's vibrant tourism industry. Examples of Kenya's natural wonders include the famous Maasai Mara's annual wildebeest migration, unique landscapes and many other activities of touristic interest.

1.1.2 The tourism industry significantly contributes to the economic and social well-being of all Kenyans. For example in the year 2014, tourism accounted for 10.5 percent of the GDP and 9.2 percent of employment. This compares favourably to other destinations. In France, tourism contributes to 8.9 percent of GDP and 9.9 percent of employment. The average for Europe is 9.2 percent of GDP and 9.0 of employment. The average for Africa is 8.1 percent of GDP and 7.1percent of employment.(Need to be updated)

1.1.3 Over the years, tourism has become a fiercely competitive business. This necessitates a paradigm shift in the investment and management in the sector. The focus must shift from traditional tourism products to sustainable tourism. As such, it would be vital to invest in products and services that deliver environmentally sustainable and socially responsible tourism. Also, it is imperative to harness the cultural diversity of the country by promoting cultural tourism, which is currently practised on a limited scale, but has the potential of becoming a major attraction.

1.1.4 Domestic and regional tourism has the potential of playing a greater role in Kenya's tourism industry. The domestic tourism market has grown as more Kenyans have become aware of available tourism products and engage in travel and leisure. However its growth potential is not yet fully tapped. With strong regional institutions such as East African Community (EAC) and the Common Market for

Eastern and Southern Africa (COMESA), a focus on regional tourism is essential. In addition, the business travel market as well as meetings, incentives, conferences and exhibitions (MICE) will play an important role in the future of Kenya's tourism industry.

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

???Emergency tourism fund during pandemics

1.2 Existing Tourism Sector Policy Instruments

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

In 2011, Tourism Act, 2011 was enacted and existing statutes relating to tourism were repealed. The Act brought in new institutions and some of the old ones were renamed.

1.3 Rationale and Justification for a Revised National Tourism Policy

The need for review of the National Tourism Policy, 2010 is due to a number of changes that have happened since it was adopted so as to reflect new dynamism such as devolution and new developments in tourism sector that were never envisioned in the current policy.

Tourism sector has and continues to experience turbulence arising from political, technological and economic spheres. This calls for adoption of management strategies to be able to remain sustainable in a globally competitive scene. The changes arise from the country's commitment to streamline and develop a sustainable tourism industry. In particular, the need to:

- (a) Align the National Tourism Policy and legislation with the new constitutional dispensation.
- (b) Recognize roles played by County Governments in the development and promotion of tourism at local levels.

- (c) SDGs
- (d) Bring on board lessons learnt on bottlenecks affecting tourism sector in the country.
- (e) Engineer a paradigm shift in the way tourism sector is managed given its cyclic nature, destination image and appreciating the role of information technology platforms in the development of tourism sector.
- (f) Clarify and eliminate duplicity in the mandates and operations of institutions.
- (g) Strengthen and enhance the safety and crisis management capacity within the tourism sector
- (h) Provide policy direction for development of sustainable tourism throughout the country
- i) Post Covid/Pandemic and lessons/Government interventions/UNWTO etc.

1.4 The Tourism Policy Review Process

1.4.1 In developing this National Tourism Policy, the Ministry of Tourism pursued a consultative approach that involved a number of measures in order to achieve the following:

- (a) Identify key lessons learnt in the last five years and attendant challenges and opportunities;
- (b) Align the policy with Constitution of Kenya 2010;
- (c) Recognise the role of county governments in tourism development and promotion
- (d) Place accountable stewardship of the Policy in the government and provide facilitative space for its implementation by national and county governments, private sector, civil society, local communities and other stakeholders;
- (e) Establish synergies and areas of complementarity with relevant sectoral policies and institutions; and
- (f) Enhance the safety and security of hosts and visitors through appropriate protocols for tourism and hospitality sector from MOH.

2.0 STATUS OF TOURISM SECTOR

2.1 *The State of the Tourism Sector*

2.1.1 Kenya's resource base for tourism is enormous. The country's tourism attractiveness stems from its diversity. Some of the features which make Kenya a preferred tourism destination include wildlife, beaches, varied and aesthetic scenery, favourable weather, diverse cultures and heritage, hospitality, as well as developed tourist circuits with an international airline hub.

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

2.1.2 Current statistics.

2.1.3 The tourism sector is a major source of employment. (facts on employment). The sector is also a major source of Government Revenue. The wide spatial distribution of tourist attractions also contributes to equity in the distribution of economic and infrastructural development.

2.1.4 Tourism is a competitive business and Kenya's competitiveness lies in well developed wildlife safaris and beach tourism infrastructure, niche products, hospitality, quality service as well as domestic and regional tourism. In addition, medical and health tourism is a rapidly growing phenomenon as the country has attractive and advanced medical care facilities, highly qualified medical professionals and affordable specialized medical care.

2.2 *Tourism Sector Issues and Challenges*

2.2.1 *Emerging trends in tourism industry:* Tourism is greatly evolving world over from a simplistic to a more complicated technologically savvy industry. A number of platforms and new developments have penetrated the sector and changed the way business is done. For Kenya to remain a globally competitive destination, it must embrace information technology in tourism industry by digitalization of its operations.

2.2.2 **Covid 19?**

2.2.3 *Global trends in travel markets:* There is a drastic shift in touristic consumption behaviour patterns that have radically changed the landscape in tourism sector globally. For instance, the independent traveller today wants to do everything for him/herself at the comfort of a computer without involving any travel agent. The modern traveller/tourist is looking for real authentic experiences and freedom other than stone walled hotel rooms and monotonous products; they are craving for holiday homes, home stays, apartments and innovative products as pointed out by UNWTO. This has seen emergence of new concepts in hotel such as Boutique hotels, AnB, Uber, booking platforms such as Expedia.com, Jovago.com, and Booking.com all which have tilted business towards destinations that have adopted the technology. All these presents a lot of challenges within existing regulation frameworks and opportunities for the sector hence need for review. There is need to position Kenya visa-vis the global travel market trends like Europe, Asia, Americas, Oceania and Chinese market.

There is need for tourist market segmentation and application of appropriate marketing strategies to address specific segment / niche market such as understanding and catering for the needs of the baby boomers, understanding the changing roles of media in tourism and how to manage the media. Most travellers no longer watch televisions, read newspapers to get travel information but heavily rely on social media. What is globally trending and selling today in travel market is personal referral anchored on social media hence need to review our policy directive to conform to global trends.

2.2.4 *Product quality and diversity:* Wildlife tourism in Kenya is currently concentrated in only 7 parks, which receive 80 per cent of the total number of visitors. There is, therefore, great potential in targeting the under-visited parks and reserves. In addition, only 18 per cent of

Kenyan hotels are 4-5 star categories, which is significantly lower than the average 40 per cent in competing long-haul destinations. To increase competitiveness, there is need to expand product choice and improve on quality of facilities and services. There is also need to address the unexploited and underdeveloped products.

2.2.5 Hotel/bed capacity: Where there is an increase in visitor arrivals, the bed occupancy levels during the peak season are close to full capacity and the reverse occurs during the low season. As a result, the country has to grapple with the rapid growth in demand, principally due to limited investment in tourist accommodation. It would be imperative to substantially increase investment in accommodation in order to meet the ever increasing demand for the Kenyan products.

2.2.6 Infrastructure: Despite some improvement in the state of infrastructure, there is need for further investment particularly in roads, railways, waterways, airports, airfields and telecommunications as well as aesthetic development of our cities.

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

2.2.8 Safety and security: Kenya suffers from the challenge of perceived insecurity whilst other tourism destinations like France, Egypt and Israel are not so much affected by the effect of insecurity or terrorist attacks as in Kenya due to negative media publicity, poor destination imaging or little investment in public relation tools to ensure positive destination imaging.

In the past, Kenya's tourism sector suffered from incidents of insecurity. One of the major sources of this insecurity has been political instability in the region, which has led to increasing cross-border traffic in small arms. Other sources of insecurity include cattle rustling, income inequalities, and unemployment. The Police needs to

be strengthened to support the tourism sector in addressing safety and security issues.

2.2.9 *Negative travel advisories:* It is important that the country upholds its positive image internationally.

2.2.10 *Climate change:* Globally, the climate is changing resulting in direct impacts on the environment. Adverse impacts arising from changes in climate are already being observed as evidenced by vanishing glaciers on Mt. Kenya and Kilimanjaro. People and the environment are increasingly suffering from the effects of natural disasters such as floods, landslides and prolonged droughts.

2.3 Significant Developments

A number of significant developments have and continue to happen within the country and this boosts tourism growth and development. They include among others Thika Super Highway, improved road network across the country, expansion and modernization of airports and airstrips. Already under construction is the development of the standard gauge railway from the port of Mombasa to Nairobi and further to the western side of Kenya entering into Uganda.

The installation of close circuit television cameras in the CBDs and major streets to enhance security surveillance in Nairobi and Mombasa counties is yielding dividend.

There is increased electricity accessibility and connectivity across the country which has enabled 24hours economy supported by street lighting programme. The cruise terminal is under construction at KPA Terminal in Mombasa geared towards boosting Cruise tourism in the country.

Covid 19???

GOAL, OBJECTIVES AND GUIDING PRINCIPLES

3.1 Goal

The goal of reviewing this Policy is to align and integrate it to new developments like new constitution, county governments and changing trends of tourism and travel globally to **achieve sustainable tourism that contributes to a better quality of life for all people now and for posterity.**

3.2 Objectives

The objectives of this Policy are to:

- (a) Provide a framework for integration of tourism sector considerations into the various sectoral policies and national development planning as well as decision making processes.
- (b) Strengthen the legal and institutional framework for effective coordination and management of the tourism sector.
- (c) Ensure adoption of sustainable tourism that enhances economic development, environmental sustainability and social justice.
- (d) Promote and support the provision of incentives and other economic instruments that enhance investment in the sector.
- (e) Promote and enhance collaboration, cooperation, synergy, partnerships and participation in the tourism sector by all the stakeholders.

3.3 Guiding Principles

The following guiding principles will underpin this Policy:

- (a) **Value for Visitors:** Tourism will be undertaken in a manner that provides value for money, excellence, convenience and quality service to the visitors.
- (b) **Sustainability:** Given that tourism in Kenya is nature based, tourism will be undertaken in a manner that does not compromise the quality and value of the resource, or exceed the carrying

capacity of supporting ecosystems. It will be managed in a sustainable way by incorporating long term goals in its planning and operations to ensure that it survives turbulence that faces the sector.

- (c) **Community participation:** Given that tourism products are found in and hosted by local communities focus will be on involving all stakeholders such as national, county governments, tourism operators and host communities in its management, planning, benefit sharing to achieve sustainability.
- (d) **Effective Enforcement:** Proper enforcement mechanisms with distinct powers and mandates will be prescribed to responsible agencies to ensure that all necessary laws and mechanisms are enforced accordingly.
- (e) **Responsibility in Compliance:** All tourism players and actors both state and non-state actors must take responsibility in ensuring that all players fully comply and adhere to the set rules and laws to ensure sustainability.
- (f) **Vulnerable groups/PWDs**

3.0 ENHANCING TOURISM DEVELOPMENT

4.1 *Tourism Recovery Programmes*

Following the shocks that hit the tourism sector orchestrated by insecurity incidences from Al-Shabbab (**Covid19 and other pandemic**) terrorist attacks, Ebola outbreak in West Africa and issuance of travel advisories against travel to Kenya, the government established a National Tourism Recovery Taskforce in 2015 comprising industry stakeholders who assessed the tourism landscape and made recommendations in their Report. The government has already implemented most of the key of these recommendations including:

- The charter incentive programme which waived airport landing charges for charters terminating in Mombasa and Malindi. Additionally a rebate of \$30 per passenger was given on such flights
- Reduction of park entrance fees from \$80 to \$60 and the removal of VAT on the park fees.
- Waiver of visas on children under 16 years travelling to the country.
- Waiver of VAT on tour operator commissions.

Further, there are other measures in place such as redeeming of destination image and positive publicity by employing public relation tools, product diversification, provision of high quality standards of products and services, tourism area planning and incentives to attract investments in tourism sector.

333Domestic Tourism

4.2 *County Tourism Development*

Whenever tourists visit Kenya, they visit a particular facility or locality to enjoy the wonderful experiences Kenya has to offer. This happens in one or several of the counties in Kenya that host these tourism facilities and products. The county governments are the custodian of tourism resources hence they have vital role to play in tourism

development in the country. Further, county governments have other important functions that affect tourism sector such as provision of county infrastructure, enacting county legislation and licensing of entertainment facilities. County governments also have a potential of benefiting significantly from tourism revenues and other associated benefits. In this regard, the government in collaboration with county governments will endeavour to:

- 1. Support county governments in the development of local tourism products through technical assistance.*
- 2. Support county governments in establishing sub-national tourism marketing boards*

4.3 Tourism Products and Services

4.3.1 Kenya has traditionally been regarded and developed as a beach, wildlife safari and to a limited extent a conference tourism destination. While these are likely to remain her core products and services, it will be prudent to diversify to other tourism products.

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

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

- 1. Diversify, develop and implement innovative tourism products that enhance economic growth, environmental sustainability and preserve heritage.*

2. *Support county governments in designing and developing authentic innovative tourism products at the local areas.*
3. *Ensure high quality standards of tourism products and services.*
4. *Establish carrying capacities for each tourism area.*
5. *Provide incentives for investment in tourism products and services.*
6. *Enhance the uptake of MICE tourism in the Post-Covid era*
7. *Invest in new tourism products that link with existing infrastructure projects, including airports, SGR and major roads.*

4.4 Tourism Pricing

Tourism industry is highly competitive with limited flexibility to set prices. However, there is need for the country to adopt dynamic pricing strategy geared towards growing domestic tourism in the country by making travel affordable to Kenyans. Despite the apparent lack of flexibility, however, the uniqueness of tourism products actually enables producers to establish prices. This uniqueness stems from a number of product attributes, including locality, surrounding natural environment, the types of facilities offered and real and perceived differences in the quality of the products. Therefore, the ability of Kenya as a destination to compete globally depends largely, along with other conditions, on the mixture, quality and prices of the facilities and services offered.

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

1. *Adopt a consumer sensitive pricing strategy.*
2. *Encourage online transactions including payments.*

4.5 Tourism Ethics and Standards

Ethics and standards are important constitutive aspects of sustainable tourism. Sustainable tourism obligates all actors to respect and adhere to established norms, practices and standards, particularly with respect to the environment and culture of the country. For example protection from commercialization of culture as well as pornography and child sex

exploitation requires joint efforts. Furthermore, improvement of standards of service is critical to the sustainability of Kenya's tourism and a cornerstone of its image. In this regard, the Government in collaboration with stakeholders will:

1. *Develop and implement a Code of Practice for the tourism sector that sets out the minimum standards and guidelines of best practices.*
2. *Encourage Tourism Associations to self-regulate to ensure customised ethics and standards.*
3. *Promote the development and implementation of quality tourism standards.*
4. *Encourage and support county governments to enact appropriate legislation with requisite enforcement to enhance safe, secure and ethical tourism.*
5. *Review and reform the existing structure, criteria and system of standards and classification of accommodation establishments and restaurants to make the process more effective.*
6. *Encourage tourism private sector operators and communities to form umbrella associations with codes of practice that enhance self-regulation.*
7. *Harmonise licencing and other levies between Govt.and Conties*
8. *Regulatory framework for Events Industry*

4.6 Tourism Research and Information Management

4.4.1 Tourism Research Institute has been established to provide sound tourism research and statistical base that is critical to improving the sector's competitiveness and to making informed policy decisions. It is important that tourism research, intelligence and information management is bolstered in order to provide accurate and reliable information and forecasts to better support tourism planning, product development and decision making.

4.4.2 The external shocks that Kenya's tourism industry has experienced in recent years have highlighted the deficiencies in the existing tourism information system and the country's inability to predict and accurately evaluate the immediate impact of such events and their

likely implications for the country's economy in the short and medium term. This underlines the need to improve tourism information systems. Quantitative and qualitative research is needed to answer key questions about the performance and impact of the tourism industry in the country.

To ensure that the tourism sector is responsive to global trends of tourism through availability of tourism data and information, the government will:

- 1. Strengthen the Tourism Research Institute to undertake and coordinate tourism research and information management.*
- 2. Develop a Tourism Digital platform that will provide data from parks, game reserves, accommodation facilities, inbound outbound data from immigration in real time.*
- 3. Enact appropriate regulations requiring regular submissions of data by tourism agencies and facilities.*
- 4. Support county governments with technical expertise to develop capacity to capture tourism information.*

4.7 Infrastructure and Transport

The existence of good and well-functioning infrastructure and transport such as road, rail, air, water transport, telecommunication, ports and electricity as well as water and sanitation is vital for a competitive tourism industry.

4.5.1 Roads

All visitors use road transport. The poor quality of roads directly diminishes tourism competitiveness through delays in transportation and high operational costs. Maintenance and improvement of the existing road network is of paramount importance. Furthermore, the quality of tourist vehicles impacts on the visitors' safety and comfort. The tourism sector lacks effective guidelines for regulation of the tourist service vehicles (TSVs) and the operators.

The Government in collaboration with stakeholders will endeavour to:

- 1. Ensure that tourism circuit roads are mainstreamed into the National Roads Investment Plan.*
- 2. Give high priority for upgrading, rehabilitation and periodic maintenance and signage for access roads to regional and local tourist destinations.*
- 3. Establish, in collaboration with Ministry of Transport regulations, guidelines and measures for licensing Tourist Service Vehicles (TSVs) and operators.*
- 4. Ensure that tourism circuit roads are well marked (signage programme) under close collaboration with the Ministry of Infrastructure and County Governments.*
- 5. Encourage county governments to prioritise upgrading and maintenance of tourism roads.*

4.5.2 Air

4.5.1 Most international and regional visitors are highly dependant on the international and domestic aviation. Kenya has several international airports as well as domestic airports and airstrips. These facilities require improvement and provision of sound operations equipment to make them more competitive and safe. In addition, the airport service charges and taxes as well as aviation fuel should be competitive. It is also important that all aircraft and balloon operations are carried out in a safe manner.

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

The Government will endeavour to:

- 1. Ensure that all international and domestic airports are expanded, properly serviced and well maintained and, where applicable, construct new ones through public private partnerships.*
- 2. Ensure that airstrips in designated tourism circuits are serviceable, secure and properly maintained.*

3. *Ensure that airports and airstrips have designs for a pleasant traveller experience providing comfort, efficiency, ease of movement and communication and minimum delay in the processes.*
4. *Encourage competitive airport service charges, taxes and aviation fuel cost to attract more international and regional air operators.*
5. *Promote coordination of inter-regional airline schedules.*
6. *Encourage bilateral and multilateral agreements on air travel with a view of opening up airspace for both scheduled airlines and charters.*
7. *Ensure all aircraft and balloon operations are done in accordance with international standards.*

4.5.3 Railway and Port Services

4.5.3.1 The rail transport plays a very important role in tourism. Over the years, the transport system has deteriorated due to erratic passenger transport schedules and inordinate delays as a result of frequent derailments. Consequently, it has become an unattractive mode of travel, even though it should be one of the safest modes of transport.

4.5.3.2 Ports are major gateways into the country. Efficient port operations would improve clearance and movement of goods, water transport as well as enhance cruise tourism.

The Government will endeavour to:

1. *Modernize and revamp the railway system so as to make it a preferred mode of passenger travel.*
2. *Introduce a dedicated premium train service for tourism*
3. *Encourage public private partnership investments in road and railway trams in cities and other urban centres.*
4. *Streamline operations at the ports of entry to enhance business tourism.*
5. *Ensure that coastal and inland water ports become international and regional hub for cruise tourism by provision of appropriate incentives and facilities.*

- 6. Provide a regulatory framework to ensure safe operations of water vessels used in tourism activities.*
- 7. Provide incentives for investment in water passenger vessels, ferries and leisure boats including vessels used in tourism activities.*

4.5.4 Telecommunication

Telecommunications is considered as a constraint to doing business in Kenya as opposed to other countries in the region. There is need to modernize the telecommunication systems to compare favourably with those of modern economies to enhance tourism business in the country.

- 1. Modernize, improve and upgrade the telecommunications facilities, in particular, broadband and efficient internet, to effectively service the tourism sector.*
- 2. Require that all tourist facilities ((including convention facilities) provide access to internet at no additional charges.*
- 3. Encourage e-tourism. The government has launched e-tourism portal as a one point shop information resource centre for tourism in the country with enriched contents capturing all counties in Kenya.*
- 4. Encourage urban centres to provide free wi-fi access to residents and visitors.*

4.5.5 Water and Electricity

4.5.5.1 The government commissioned the construction of the cruise terminal point at KPA Mombasa geared towards growing Cruise Tourism in the country. It is expected to be completed by October 2017.

4.5.5.2 Water supply and sewerage networks are generally poor as a result of underinvestment in the necessary infrastructure. In addition to water supply from the mains, majority of tourist hotels have had to invest in boreholes and septic tanks.

4.5.5.3 Electricity is a major constraint to business operations in Kenya. A comparison of electricity costs between Kenya and other countries shows that the country is quite uncompetitive on cost and provision of power. Majority of hospitality and tourism

establishments invest in generators and power stabilizers with corresponding high production costs.

The Government in collaboration with stakeholders will endeavour to:

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

4.6 Safety and Security

Safety and security of both the hosts and visitors are pre-requisites to a growth of sustainable tourism. In this regard, it is vital that every effort is made to foster and maintain an environment that provides assurance to visitors on their security and safety.

- 1. Establish a well equipped independent Tourism Protection Service to provide safety and security of host and visitors in tourist.*
- 2. Strengthen the capacity of the police to bolster the responsibilities undertaken by the Service.*
- 3. Enhance collaboration and partnerships between relevant Government security agencies, private sector and local communities in provision of security and safety to both hosts and visitors.*
- 4. Ensure appropriate tourism sector safety guidelines, procedures and measures are developed and implemented.*
- 5. Encourage tourists to take insurance covers.*
- 6. Establish and strengthen Tourism Sector Safety, Communication and Crisis Management Centre through public private partnership in every tourism circuit.*

4.0 TOURISM DEVELOPMENT, PROMOTION AND MARKETING

As markets become more segmented, with various groups within a single market seeking different experiences, the need to better align tourism products and experiences with consumer demand is necessary.

5.1 Tourism Development

Tourism is the fastest growing industry in the world. Tourist activities involve the transportation and hosting of visitors in the destination where the product is consumed. The industry is structured in such a way that the consumer is brought to the product. This structural difference produces a special relationship between the consumer and the product. Kenya offers a wide range of tourist products, whose development requires stakeholder partnerships. Furthermore, the conservation of tourist attraction assets is critically important for the long term sustainability of the industry. Developments which adversely impact the environment should be avoided.

- 1. Develop standard guidelines and procedures on tourism products development in the country that should be cascaded to the grass root levels such as guidelines on Sports tourism, Agro-tourism, Cultural tourism ,MICE tourism, Home stays, Cruise tourism and Adventure tourism*
- 2. Promote investment in sustainable tourism development by providing conducive environment in form of enabling policies and incentives.*
- 3. Establish a specialized financial institution to provide financial assistance and business advisory services to the tourism sector.*
- 4. Develop and implement criteria for standardization and classification of tourism facilities and services.*
- 5. Ensure that the quality of tourism products and services meet the expectations of both the host and the visitor.*
- 6. Ensure that all tourism areas implement integrated tourism development area plans developed through a participatory process to safeguard against uncontrolled developments.*

7. *Ensure that all tourist establishments put in place formal environmental management systems (EMS) to enable them detect and address adverse economic, environmental and social impacts.*
8. *Ensure that the development of tourism facilities provide for the needs of persons with disabilities.*

5.2 Tourism Promotion and Marketing

5.2.1 International Tourism

The success of sustainable tourism is dependant upon effective and creative marketing and promotion of the country as a destination. This calls for a coordinated and structured approach that builds on cooperation between the government and stakeholders. To enhance international tourism, the Government in collaboration with stakeholders will endeavour to:

1. *Develop a National Tourism Marketing Strategy to guide and inform tourism marketing and promotion in the country.*
2. *Enhance and promote public private partnerships in promotion and marketing the country as the premier tourist destination and through effective branding of Kenya.*
3. *Strengthen the national tourism marketing agency responsible for promotion and marketing.*
4. *Ensure Kenya Missions abroad are well equipped to handle tourism issues.(delete)*
5. *Enhance collaboration between the national tourism marketing agency and the Kenya Missions abroad on destination marketing.*
6. *Strengthen the National Convention Bureau / agency responsible for Business Tourism and associated facilities covering the whole country.*
7. *Establish mechanisms for feedback and to monitor the effectiveness of tourism promotion and marketing efforts.(Customer retention)*
8. *Eliminate barriers in the issuance of visas to foreign nationals intending to visit the country without compromising national security.*
9. *Diversify tourism in the light of the changed environment due to the pandemic*

5.2.2 Domestic Tourism

++ Incentives

5.2.3 Regional Tourism

5.2.3.1 Domestic tourism is the future of Kenya's tourism industry with immense potential to become a strong sub-sector through education and awareness creation.

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

In order to enhance domestic and regional tourism, the Government, in collaboration with stakeholders, will endeavour to:

- 1. Develop and implement a Domestic Tourism Strategy and strengthen the capacity of In-Country Regional Boards for effective implementation.*
- 2. Encourage investment in budget-priced tourism facilities.*
- 3. Harmonize regional policies dealing with tourism development, promotion and marketing.*
- 4. Promote and support the development of a regional strategy for tourism promotion and encourage regional tourism promotional activities for the development of the industry.*
- 5. Encourage intra-Common Market tourism and strengthen the East African Tourism Council.*
- 6. Adopt a common approach to tourism research, standards, classification and training.*
- 7. Promote the establishment of transboundary and transfrontier conservation areas as a tool for enhancing regional tourism integration.*
- 8. Eliminate barriers on visa and travel restrictions for bona fide visitors within the region.*

5.3 Human Resource Development and Training

Human resource development and capacity building is important for efficient and effective tourism management. As a labour-intensive industry, the sector has the potential to substantially contribute to the labour market. Appropriate training and development is required to ensure that service delivery is of the highest possible standard.

To enhance human resource capacity and training, the Government, in collaboration with stakeholders will endeavour to:

- 1. Promote the development of a critical mass of well-trained personnel in the tourism sector.*
- 2. Improve and expand the existing national hospitality and tourism training facilities.*
- 3. Develop and implement a hospitality and tourism industry curriculum, standards and certification in consultation with the Ministry of Education.*
- 4. Regulate the hospitality and tourism training institutions.*
- 5. Improve access to training opportunities through a system of scholarships, revolving loans and incentive schemes.*
- 6. Encourage technical know-how and student exchange programmes within and outside the region.*
- 7. Good labour relations in the sector*

5.0 LEGAL AND INSTITUTIONAL FRAMEWORK

Tourism must be developed with long term sustainability hence the existing legal and institutional framework needs to be reviewed.

6.1 Legal Framework

Review the existing Tourism Act to clarify mandates and operations of the existing institutions with a view to:

- 1. Remove duplication and overlap of mandates and functions*
- 2. Strengthen the policy and oversight role of the Ministry*

6.2 Institutional Framework

The changes that have taken place since the implementation of this policy have weakened the role of the Directorate of Tourism. As a result, state corporations operate without the support, coordination and policy inputs of the Ministry of Tourism. In this regard, there is need for a paradigm shift to rationalize the functions of the Ministry and the institutions under it. This will avoid overlapping, duplication and conflicting mandates and responsibilities. To streamline institutional arrangement within the tourism sector, the Government will endeavour to:

- 1. Restructure, reorganize and strengthen the capacity of the State Department of Tourism.*
- 2. Provide for preliminary conflict resolution in the sector within the government with right to recourse to the High Court.*

6.3 Financing Tourism

The tourism sector requires sufficient and sustainable financing to successfully achieve its desired goal. The current allocation to the sector is inadequate. There is therefore urgent need to complement Government funding by harnessing additional funding from multilateral funding

mechanisms, development partners, private sector and civil society organizations.

The Government in collaboration with stakeholders will endeavour to:

- 1. Provide adequate resources for tourism development, promotion and marketing through the annual Government budgetary allocation.*
- 2. The government will endeavour to provide incentives for the recovery and development of tourism sector*
- 3. The government will introduce specific levies targeted at mobilizing resources for the direct development of the sector*
- 4. Promote participation of the private sector, communities, individuals and marketing through provision of fiscal incentives.*
- 5. Broaden the revenue and funding base to ensure the financial sustainability of tourism sector.*
- 6. The government will endeavour to ensure that the funds under TF shall be applied for purposes that have direct benefit to the sector including tourism marketing, research, training and protection services in a formula that is in concurrence with the Cabinet Secretary.*

6.4 International Cooperation

Tourism is greatly influenced by international instruments such as UN WTO, IATA/UFTAA and ICAO. Significant benefits can be realized and increased through such co-operation. To enhance international cooperation on tourism matters, the Government will endeavour to:

- 1. Establish and strengthen coordination mechanisms to ensure consistent negotiations and implementation of tourism-related bilateral and multilateral agreements.*
- 2. Ensure domestication of regional and international tourism-related instruments.*

6.0 LINKAGES WITH OTHER SECTORS

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

7.1 *Linkages with other sectors*

Tourism permeates every sector of the economy. Consequently, an agreed framework between sectors and across sectors on the coordination of tourism development at all levels will assist in clarifying the roles and responsibilities. To enhance linkages between the tourism sector and other sectors, the Government will endeavour to:

- 1. Provide for structured collaboration and regular consultations at national government level with appropriate agencies to ensure cross- and inter-sectoral coordination and policy integration of tourism considerations into sectoral policies, programmes and plans*
- 2. Provide for structured collaboration and regular consultations between national and county governments.*
- 3. Encourage roundtable meetings with various stakeholders to enhance dialogue and partnerships.*
- 4. Encourage appropriate use of the sector-wise approach (SWAP) as a tool for coordinated planning that will ensure incorporation of tourism concerns.*
- 5. Ensure that tourism-related policies, programmes and plans are subjected to strategic environmental assessment (SEA).*
- 6. Ensure that all tourism development activities, whether by Government, foreign direct investors or otherwise, undertake environment impact assessment (EIA) before approval and implementation.*
- 7. In consultation with the National Environment Management Authority (NEMA), develop and implement tourism sector environmental impact assessment guidelines.*

7.2 Partnerships and Stakeholder Involvement

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

- 1. Provide an enabling environment and appropriate incentives to enhance public private partnerships.*
- 2. Provide an opportunity for private sector and communities to participate actively in developmental planning and implementation of sustainable tourism development.*
- 3. Encourage formation of an umbrella association for the tourism sector as a platform for a common voice and self regulation.*
- 4. Involve local (host) communities in the tourism industry by establishing partnership venture, out-sourcing and purchase of goods and services.*

7.3 Tourism Education and Public Awareness

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

- 1. Support the development and implementation of a tourism education and public awareness strategy.*
- 2. Encourage travel by the public and students to tourism destinations.*
- 3. Encourage establishment in-country regional tourism boards.*

7.0 IMPLEMENTATION STRATEGIES AND ACTIONS

The main responsibility for following up this Policy and ensuring its realization rests with the Government. The proposed implementation strategies and actions presuppose active participation of stakeholders at all levels. In this regard, the following strategic actions will guide the implementation of this Policy:

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

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

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

8.2 Amendments to the Tourism Act

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

8.3 Clarifying Roles and Responsibilities

Implementation of this Policy will involve different groups, including Government agencies, private sector, civil society organizations, local communities and the public. A key element is defining the roles and responsibilities of each group. The table below shows various roles and responsibilities to be performed by the institutions under the Ministry.

Institution	Role and Responsibilities
State Department of Tourism	<ul style="list-style-type: none"> • Overall oversight of the tourism sector: <ul style="list-style-type: none"> ✓ Policy development and monitoring ✓ Develop standard guidelines and procedures on tourism products development ✓ Bilateral and multilateral agreements ✓ Development of National Tourism Strategy ✓ Development of Integrated Tourism Development Area Plans ✓ Develop standard guidelines and procedures for developing Area Tourism Plans ✓ Prepare Annual National Tourism Status Report ✓ Develop National Tourism Marketing Strategy in consultation with stakeholders ✓ Establish a National MICE Bureau ✓ Establish a National Tourism Crisis & Information Management Centre ✓ Inter-ministerial coordination ✓ Tourism Business Council ✓ Roundtables

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	<ul style="list-style-type: none"> ✓ Coordination of tourism product development and marketing ✓ Multi-stakeholder Forum ✓ Responsible for sub-national regional boards
Tourism Regulatory Authority (TRA)	<ul style="list-style-type: none"> • Regulation of the tourism sector <ul style="list-style-type: none"> ✓ Licensing ✓ Inspection ✓ Development and enforcement of standards for tourism facilities and services ✓ Regulation of training institutions
Kenyatta International Convention Centre	<ul style="list-style-type: none"> • Provision of conferencing facilities
Kenya Utalii College (KUC)	<ul style="list-style-type: none"> • Tourism and hospitality training and capacity building
Tourism Protection Service (TPS)	<ul style="list-style-type: none"> • Safety of visitors and hosts in all tourist destinations • Tourism Crisis Management Centre
Tourism Finance Corporation(TFC)	<ul style="list-style-type: none"> • Specialized financial institution and business advisory services in tourism sector <ul style="list-style-type: none"> ✓ Investment support ✓ Financial and business services
Tourism Fund (TF)	<ul style="list-style-type: none"> ✓ Collection of levies
Tourism Research Institute (TRI)	<ul style="list-style-type: none"> • Research and Development <ul style="list-style-type: none"> ✓ Comprehensive tourism database ✓ Tourism market intelligence ✓ National tourism information management system ✓ Monitoring and Evaluation
Kenya Tourism Board (KTB)	<ul style="list-style-type: none"> • Tourism marketing and promotion both international and domestic tourism • Promotion of Cultural tourism, Agro-tourism, Sports tourism, Wildlife, Beach tourism, Cruise tourism and Adventure tourism

