

DRAFT

**KENYA NATIONAL TOURISM STRATEGY
(2025-2030)**

Draft

June 2025

FOREWORD

DRAFT

ACKNOWLEDGEMENTS

DRAFT

EXECUTIVE SUMMARY

The Kenya National Tourism Strategy (NTS) 2025–2030 presents a bold and transformative roadmap to reposition Kenya as a globally competitive, sustainable, and inclusive tourism destination. Anchored on Kenya Vision 2030, the Bottom-Up Economic Transformation Agenda (BETA), and key regional and global frameworks such as the African Union’s Agenda 2063 and the Sustainable Development Goals (SDGs), the strategy outlines a multi-sectoral approach to revitalize tourism as a catalyst for economic growth, job creation, and national integration.

The Vision for Kenya’s National Tourism Strategy (2025-2030) is that “**Kenya becomes a competitive and sustainable tourism destination**”. This is underpinned by the urgent need presented by the changing domestic, regional and global environment. The Vision indicates the country’s aspiration for its developmental priorities and tourism’s role in realizing these. Specifically, the Vision indicates the country’s aspiration to become a globally competitive tourism destination anchored on a reputation of being a top safari choice destination in the African region, a destination that supports authentic magical experience dispensed on global best practices and sustainable principles, attracting visitors and investments while guaranteeing that such development remains inter- and intra-generational inclusive and does not compromise preservation of her cultural and natural heritage.

Aligned to this Vision, **the Mission of this Strategy is “To foster the tourism sector’s contribution to Kenya’s economy through effective development, management, and marketing in collaboration with stakeholders”**. Towards this commitment, development of Kenya’s tourism under this National Tourism Strategy shall be guided by the following Six Principles:

1. **A sector-wide commitment to Service excellence:** The entire tourism value chain, including the non-tourism service providers shall continually strive for service excellence towards all tourists.
2. **Economic inclusion:** Kenya’s tourism shall be developed in a manner that creates economic opportunities for all including local communities (especially marginalized groups), local SMEs, the youth and, women.
3. **A complimentary approach to destination competitiveness:** Kenya’s tourism competitiveness shall be anchored on enhancing the unique tourism resources of each individual region and building synergies between regions and between the national and regional levels.
4. **Enhancing tourism multiplier effect:** Kenya’s tourism shall be developed with a view to reducing economic leakages while enhancing tourism economic linkages and multiplier effect.

5. **Stakeholders Collaboration and cooperation:** The multiple stakeholders in Kenya's tourism shall cooperate and collaborate in the development of the country's tourism based on mutual trust and commitment to a shared vision
6. **Sector-wide commitment to responsible tourism:** All tourism development and activities shall seek to deliver on the triple bottom-line, namely economic, social and environmental sustainability

The strategy is built around **three Strategic Directions** and **Nine Strategic Pillars**, each designed to address the systemic challenges, untapped opportunities, and emerging trends shaping the global and local tourism landscape.

Strategic Direction 1: Enhance Global Competitiveness of Kenya's Tourism Industry

This direction focuses on product innovation, diversification, market expansion, and improved destination appeal. It prioritizes:

1. **Product Development and Diversification:** Expanding beyond traditional beach and safari offerings to include cultural, wellness, sports, adventure, agri-tourism, and MICE tourism.
2. **Tourism Promotion and Marketing:** Strengthening Kenya's visibility globally, implementing targeted market approaches, and securing sustainable promotion funding.
3. **Tourism Human Resource Development:** Building a globally competitive tourism workforce through training, partnerships, and positioning Kenya as a tourism education hub.
4. **Destination Accessibility and Support Infrastructure:** Enhancing international and domestic connectivity, infrastructure, and last-mile access to unlock tourism potential across all regions.

Strategic Direction 2: Ensure Kenya's Tourism is Sustainable, Resilient, and Inclusive

This pillar underscores Kenya's commitment to environmental stewardship, safety, and inclusive growth by:

1. **Promoting Destination Sustainability:** Mainstreaming sustainability principles, strengthening regulatory frameworks, and establishing green financing for tourism.
2. **Enhancing Safety, Security, and Resilience:** Strengthening tourism crisis management systems and safety protocols to withstand global shocks and health emergencies.
3. **Fostering Research, Innovation and Knowledge Management:** Advancing tourism intelligence, technology adoption, and policy-relevant research to inform evidence-based decision-making.

Strategic Direction 3: Establish an Enabling Policy, Regulatory, and Institutional Framework

To support seamless strategy execution, the NTS focuses on governance and investment frameworks through:

1. **Tourism Policy, Legal and Institutional Reform:** Harmonizing county-national policies, clarifying institutional mandates, and building capacity for policy implementation.
2. **Sustainable Financing of Tourism Development:** Streamlining financing for national programmes and establishing a tourism development financing framework that attracts diverse investments.

Expected Outcomes (2025–2030)

This strategic outlook outlines measurable targets across key performance indicators anchored on the principles of sustainability, innovation, and equitable growth.

Indicator	2030 Target
1. International tourist arrivals	5 million
2. Tourism revenue (Kes)	KES 1.2 trillion (~USD 9B)
3. Contribution to GDP (direct)	12% combined
4. Tourism-related employment	2.5 million
5. Average length of stay	12–14 nights
6. Tourism investment (annual)	KES 200 billion+ annually
7. Domestic tourism trips	10 million+ bed-nights
8. Classified beds	125,000
9. Accredited beds	215,000
10. MICE sector share	30–35% (~1.5 million arrivals)
11. Share of niche tourism products	35–40% of total product range

This strategy is the culmination of extensive consultations with stakeholders across national and county governments, the private sector, communities, development partners, and academia. It is a blueprint for unlocking Kenya’s tourism potential while ensuring long-term environmental, economic, and social sustainability.

The NTS 2025–2030 is not only a plan—it is a national commitment to making Kenya a leading, inclusive, and future-ready tourism destination.

Table of Contents

FOREWORD.....	2
ACKNOWLEDGEMENTS	3
EXECUTIVE SUMMARY	4
1.0 INTRODUCTION	9
2 SITUATIONAL ANALYSIS	13
2.1 Global Tourism Outlook.....	13
2.2 Tourism Trends in Africa.....	15
2.3 Outlook of Kenya’s tourism industry	16
2.3.1 Competitive Analysis of Kenya’s Tourism Industry	20
2.4 Summary of Kenya’s Tourism SWOT Analysis	25
2.5 PESTEL Analysis of Kenya’s Tourism Sector.....	30
THE KENYA NATIONAL TOURISM STRATEGY 2025-2030	31
3.1 RATIONALE FOR THE NTS 2025-2030	32
3.2 PROCESS OF PREPARING THE NTS 2025-2030	33
3.3 UNDERPINNING NATIONAL, REGIONAL AND GLOBAL DEVELOPMENT FRAMEWORKS	34
3.4 BUILDING ON THE PREVIOUS NATIONAL TOURISM STRATEGIES	38
3.5 VISION, MISSION AND GUIDING PRINCIPLES OF THE NATIONAL TOURISM STRATEGY (2025-2030).....	40
3.6 STRATEGIC PILLARS	41
Strategic Direction 1: ENHANCE GLOBAL COMPETITIVENESS OF KENYA’S TOURISM INDUSTRY	43
Strategic Pillar 1.1: PRODUCT DEVELOPMENT AND DIVERSIFICATION.....	44
Strategic Pillar 1.2: TOURISM PROMOTION AND MARKETING.....	63
Strategic Pillar 1.3: TOURISM HUMAN RESOURCE DEVELOPMENT	73
Strategic Pillar 1.4: DESTINATION ACCESSIBILITY.....	81

Strategic Direction 2: ENSURE THAT KENYA’S TOURISM IS SUSTAINABLE, RESILIENT AND INCLUSIVE	86
Strategic Pillar 2.1:: DESTINATION SUSTAINABILITY	87
Strategic Pillar 2.2: DESTINATION SAFETY, SECURITY AND RESILIENCE	95
Strategic Pillar 2.3: RESEARCH, INNOVATION, AND KNOWLEDGE MANAGEMENT	98
Strategic Direction 3: ESTABLISH AN ENABLING POLICY, REGULATORY AND INSTITUTIONAL FRAMEWORK.....	101
Strategic Pillar 3.1: TOURISM POLICY, LEGAL AND INSTITUTIONAL FRAMEWORK 102	
Strategic Pillar 3.2 SUSTAINABLE FINANCING OF TOURISM DEVELOPMENT	110

4.0 NTS IMPLEMENTATION FRAMEWORK.....	113
5.0 MONITORING AND EVALUATION FRAMEWORK.....	113
5.1 SECTOR GROWTH TARGETS.....	113
5.2 NTS IMPLEMENTATION MONITORING AND EVALUATION PLAN	116
6.0 INSTITUTIONAL FRAMEWORK.....	117
APPENDIX: PROPOSED STRUCTURE OF THE TOURISM TRANSFORMATION COUNCIL (TTC).....	123

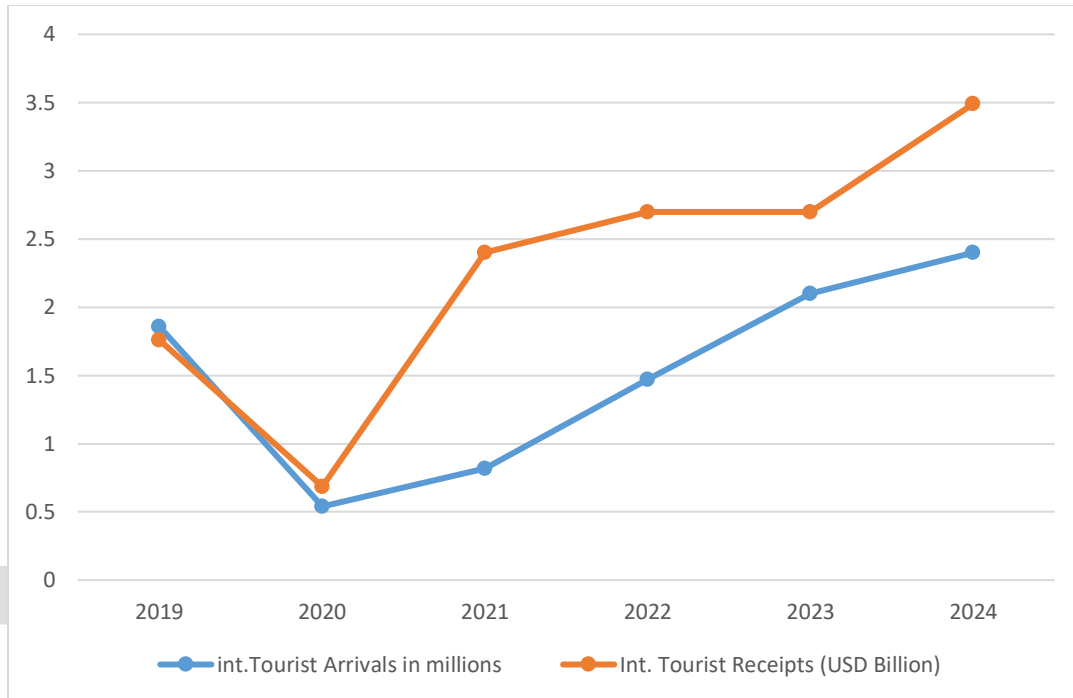
1.0 INTRODUCTION

The Tourism sector in Kenya has maintained its position as a key pillar to the country's economy and instrumental in the socio-economic well-being of the Country's citizens with multiplier effects spanning across in Agriculture, Trade, Environment, Manufacturing and Infrastructure among other sectors. The sector is a leading foreign exchange earner and a major source of employment. In the year 2019 for instance, tourism accounted for 13.1 percent of total exports and 5.5 percent of the total employment in Kenya.

Despite occasional disruptions including the unmatched Covid 19 impact, Kenya's tourism sector has demonstrated remarkable growth and resilience. In 2024 for instance, the country welcomed a record-breaking 2.4 million international visitors, a 15% increase from the previous year, resulting in tourism earnings of Kshs. 452.20 billion, up 19.79% from 2023¹. Previously, international tourist arrivals in 2023 recorded an increase of 31.5% to stand at 1,951,185 as compared to 2022 where arrivals totaled 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%.

Figure 1: International Tourism Arrivals and Receipts 2019-2024

¹ <https://tri.go.ke/wp-content/uploads/2025/02/TRI-Tourism-Sector-Performance-Report-2024.pdf>



This robust performance underscores the strategic importance of the tourism sector within Kenya's broad socio-economic framework since independence. 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 which identifies the sector as a key driver for economic transformation. Vision 2030² aims to position Kenya as a top ten long-haul tourist destination globally, focusing on high-spending visitors to boost revenue and stimulate economic growth. Furthermore, Kenya's National African

² <https://vision2030.go.ke/economic-pillar/#59>

Continental Free Trade Area (AfCFTA) Implementation Strategy (2022–2027)³ recognizes tourism as a pivotal sector for economic growth and regional integration. The strategy aims to consolidate, diversify, and expand Kenya's exports to African markets, with tourism identified as a priority service export alongside professional services, education, healthcare, financial services, ICT, cultural and sports services, and transport and logistics. By leveraging the AfCFTA framework, Kenya seeks to enhance intra-African tourism by promoting regional travel and easing cross-border movement. This approach is designed to tap into the vast potential of the African tourism market, fostering economic integration and growth. The strategy also emphasizes the importance of sustainable tourism practices, community engagement, and infrastructure development to attract a diverse range of tourists and provide exceptional visitor experiences.

Kenya's Bottom-Up Economic Transformation Agenda (BETA) further recognizes the sector's potential and seeks to position tourism as a pivotal sector for driving economic growth, job creation, and sustainable development. The government's aspirations under the Bottom-Up Economic Transformation Agenda (BETA) seek 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.

Noting the sector's significance to the nation's socio-economic development, the National Tourism Policy (2025-2030)⁴ sets as its central goal, to transform Kenya's tourism sector into an internationally competitive and sustainable sector. Towards realizing this overall goal, the Policy specifically seeks to achieve the following objectives:

- (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) *Mobilize resources for sustainable Tourism development and management*

³ KENYA'S NATIONAL AfCFTA IMPLEMENTATION STRATEGY 2022 – 2027
(https://trade.go.ke/sites/default/files/AfCFTA_Policy_Brief_Final.pdf)

⁴ National Tourism Policy(<https://www.tourism.go.ke/wp-content/uploads/2025/01/DRAFT-NATIONAL-TOURISM-POLICY-JANUARY-2025.pdf>)

- (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.*

It is anticipated that the NTS (2025-2030) will make significant contribution towards the realisation of the country's long-term development vision of being an internationally competitive and sustainable sector.

DRAFT

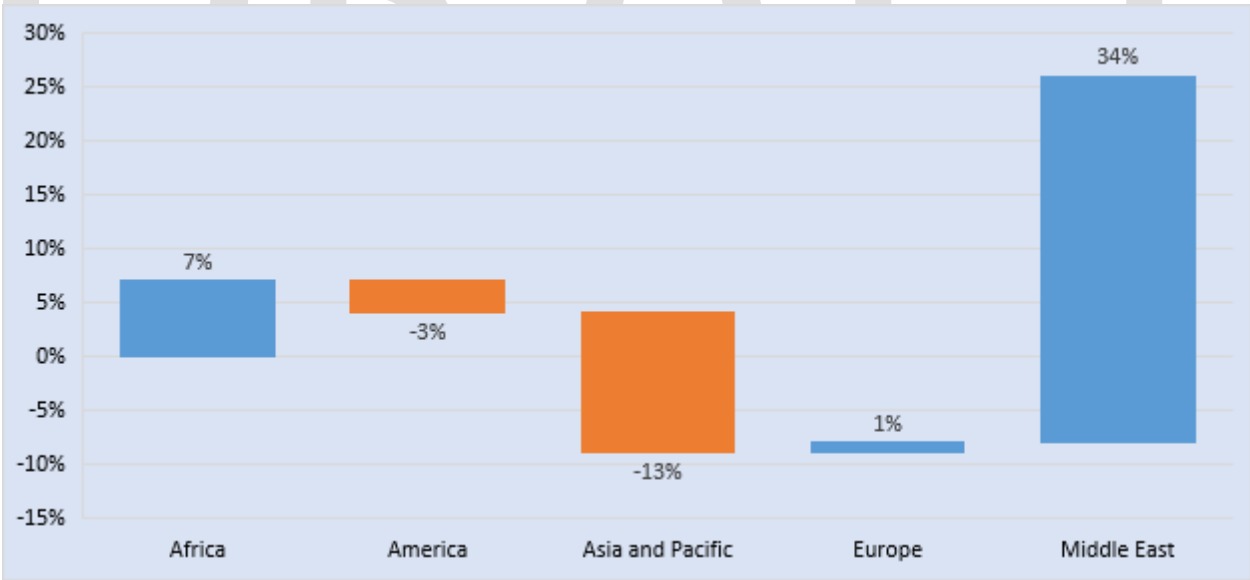
2 SITUATIONAL ANALYSIS

2.1 Global Tourism Outlook

The global tourism sector is a dynamic and multifaceted industry, contributing significantly to the world economy. In 2019, prior to the COVID-19 pandemic, tourism accounted for approximately 10.4% of global GDP, generating around \$9.2 trillion and supporting 330 million jobs, or 1 in 10 jobs worldwide (WTTC, 2021). The pandemic severely disrupted this flourishing sector, leading to a staggering 74% decline in international arrivals in 2020, which resulted in an estimated loss of \$4.5 trillion in tourism-related revenue (UNWTO, 2021).

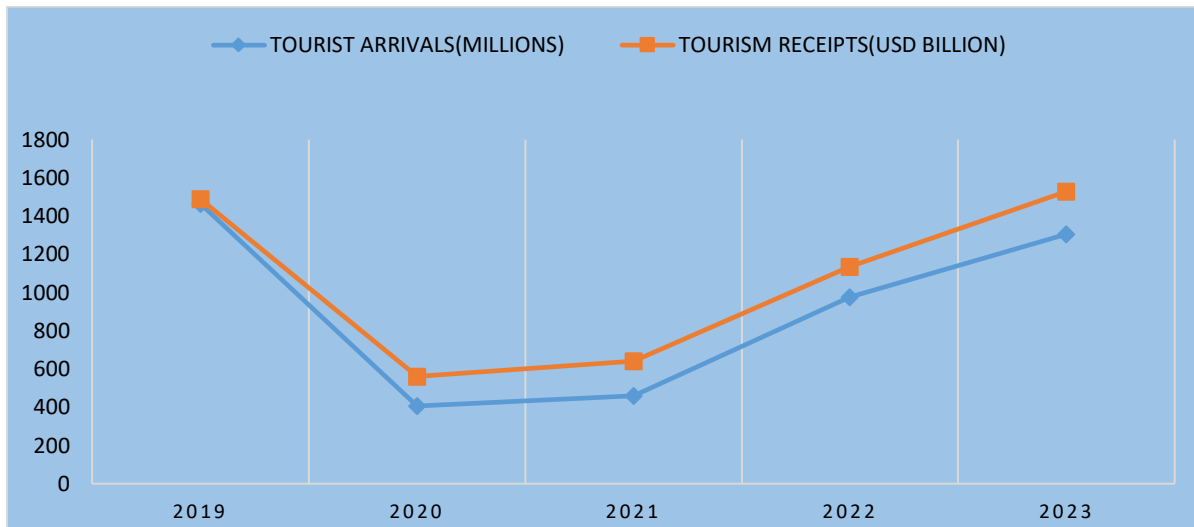
According to statistics provided by UNWTO in 2024, by 2023, global tourism had nearly returned to pre-pandemic levels as indicated in the chart below. Tourist arrivals reached 1,305.82 million, approximately 89% of the 2019 figure. Notably, tourism receipts exceeded pre-pandemic levels, rising to \$1,528.6 billion, which is 3% higher than in 2019. This suggests that higher spending per tourist played a significant role in driving financial recovery, even though the total number of arrivals had not fully recovered. Regionally, Middle East, Africa and Europe surpassed the 2019 international tourist arrivals as shown in the chart below.

Change by Region % 2019 vs 2023



Overall, this illustrates the resilience of the tourism industry, with a steady recovery from the devastating impact of the pandemic

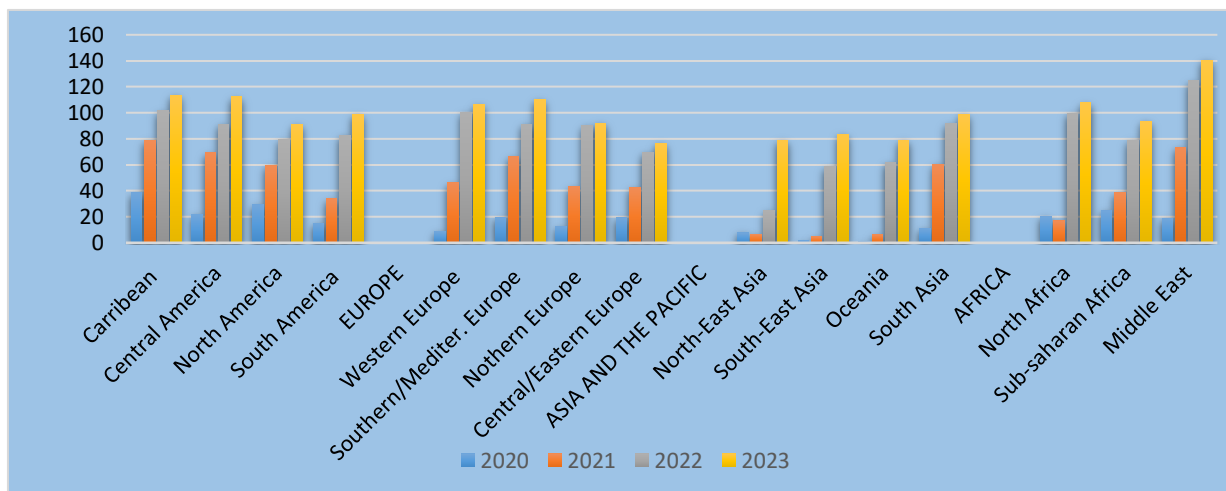
Global Tourism Performance 2019-2023



(Source: UNWTO, 2024)

As demonstrated in the table below, the tourism growth and post-pandemic recovery is different across different global regions as provided by UNWTO. The Middle East has emerged as the leader in tourism growth, driven by exceptional recovery efforts and strategic investments in the sector. Europe and America continue to dominate in absolute tourism numbers, benefiting from their well-established infrastructure and longstanding appeal to travelers. Meanwhile, Asia and the Pacific demonstrated one of the fastest rebounds, rapidly catching up by 2023 despite initial setbacks. Africa, on the other hand, has maintained steady growth, reflecting its rising prominence as an increasingly attractive tourism destination on the global stage.

International Tourism Arrivals in UNWTO global regions (in millions) 2020-2023



Source: (UNWTO, 2024)

Consumer preferences have also evolved, with travelers increasingly seeking genuine and immersive experiences, eco-friendly options, and destinations that prioritize health and safety protocols. As a result, sectors such as adventure tourism, wellness travel, and culinary experiences are witnessing significant growth (Booking.com, 2023; Travel Trends Report, 2023). A survey conducted by booking.com, 2023 indicated that 70% of travelers now consider environmental sustainability when choosing their destinations (Booking.com, 2023). This changing landscape creates both challenges and opportunities for stakeholders in the tourism industry, prompting a need for strategic adaptability.

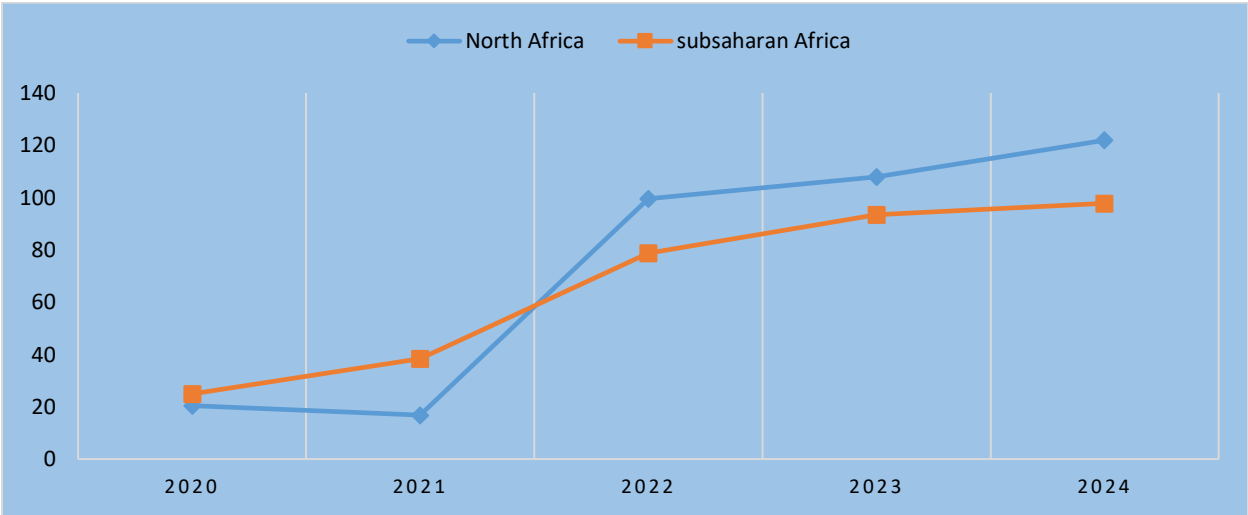
2.2 Tourism Trends in Africa

Tourism in Africa is a vibrant and growing sector that plays a critical role in economic development, job creation, and cultural exchange across the continent. One of the driving forces behind the growth of tourism in Africa is the continent's rich diversity of natural and cultural attractions. Moreover, the presence of 54 UNESCO World Heritage Sites across Africa showcases the continent's cultural wealth (UNESCO, 2021).

Tourism in Africa has undergone a significant transformation as it strives to recover from the unprecedented impact of the COVID-19 pandemic. Before the pandemic, Africa was experiencing steady growth in tourism, with the UNWTO reporting approximately 71 million international tourist arrivals in 2019, reflecting a 4% increase from the previous year (UNWTO, 2020). However, the onset of COVID-19 led to a dramatic downturn, resulting in an estimated 80% decline in international arrivals in 2020, equating to a loss of around \$55 billion in tourism revenue (UNWTO, 2021).

However, bolstered by a gradual reopening of borders and the implementation of safety measures African countries began experiencing gradual recovery from the pandemic in 2021. For instance, destinations such as Kenya and South Africa focused on enhancing health protocols and promoting domestic tourism, which proved pivotal in offsetting some of the losses incurred during the pandemic (WTTC, 2021). In 2021, the UNWTO indicated that Africa recorded approximately 6 million international arrivals, a stark contrast to the previous year but a significant step towards recovery (UNWTO, 2022). As at mid-2024, as shown in the chart below, North Africa recorded 121.92 million tourists while Sub-Saharan African recorded a total of 97.81 an improvement from the previous years.

International Tourist Arrivals in Africa Region (in millions)



Moreover, sustainability has emerged as a key theme in the post-COVID tourism landscape in Africa. The pandemic has amplified the importance of responsible travel, prompting many countries to integrate eco-friendly practices into their tourism strategies. Initiatives to promote community-based tourism and protect natural habitats are gaining momentum, showcasing the continent's commitment to sustainable development. This approach not only benefits local economies but also enhances cultural exchange and conservation efforts (African Union, 2021).

Countries like South Africa and Morocco have strategically positioned themselves as leading destinations, focusing on high-quality tourism experiences that prioritize safety and sustainability. South Africa's tourism sector, for instance, contributed around 7.5% to its GDP in 2019, and efforts to revive this contribution through responsible tourism and enhanced safety measures have been crucial in its recovery strategy (WTTC, 2021).

While challenges persist, the recovery trajectory for African tourism appears promising. Investment in infrastructure improvements, including connectivity and access to tourist sites, remains essential. Cooperation among African nations, bolstered by initiatives like the African Continental Free Trade Area (AfCFTA), encourages intra-regional travel, fostering greater economic integration and support for the tourism sector.

2.3 Outlook of Kenya's tourism industry

The tourism industry in Kenya is a vital pillar of the economy, contributing significantly to employment and GDP. Kenya's tourism sector has been steadily recovering from the severe

impacts of the COVID-19 pandemic. Prior to the pandemic, Kenya was lauded for its abundant wildlife, diverse ecosystems, and rich cultural heritage, making it a favorite destination for adventurers and travelers. In 2019, the country received approximately 2.02 million international arrivals, contributing roughly 9.2% to its GDP and supporting more than 1.5 million jobs (WTTC, 2020). However, the pandemic induced a drastic decline in this sector, with international arrivals plummeting by 72% in 2020, resulting in significant revenue losses estimated at \$1.5 billion (UNWTO, 2021).

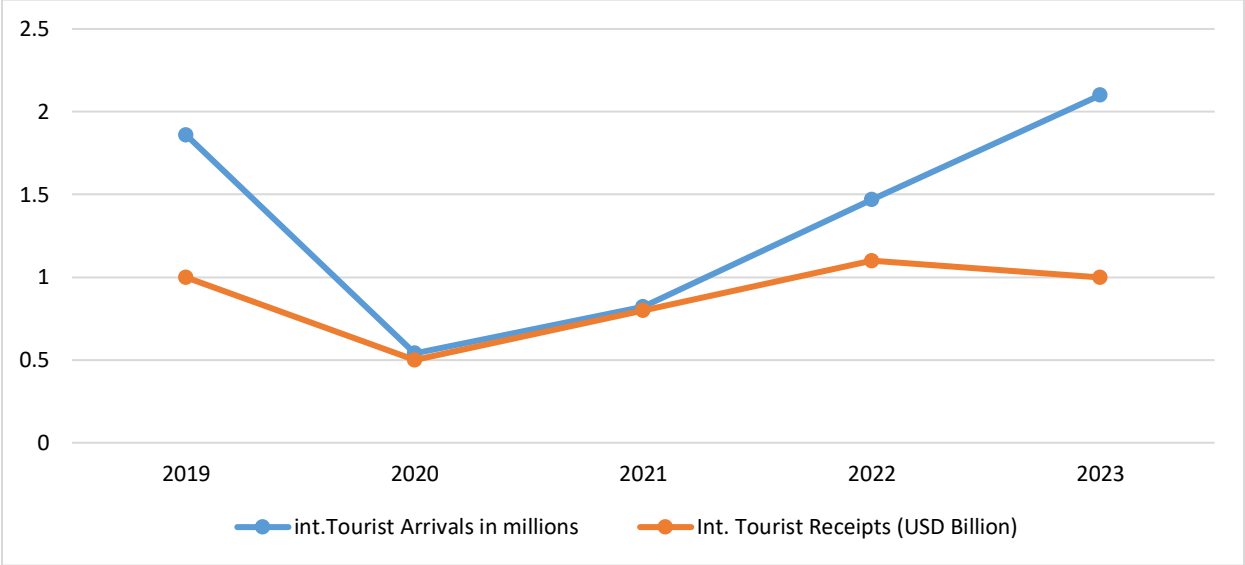
As restrictions began to ease in 2021 and 2022, Kenya implemented a series of recovery strategies aimed at revitalizing its tourism sector. By promoting health safety protocols and ensuring that key attractions maintained high hygiene standards, the government worked to rebuild traveler confidence. The introduction of the “M-Pesa” digital health pass and other digital solutions underscored the country's commitment to safe travel while streamlining visitor entry (Kenya Tourism Board, 2021). According to the UNWTO, by the end of 2021, Kenya demonstrated signs of recovery, with international arrivals rising back to approximately 1.1 million, a positive trend attributed to the increase in domestic tourism and the gradual reopening of international travel (UNWTO, 2022). The government actively encouraged local travel through campaigns promoting domestic tourism, showcasing lesser-known attractions as safe and exciting alternatives to popular destinations.

Kenya’s strategic push for eco-tourism and sustainable travel practices has played a significant role in its recovery post-COVID-19. The focus on responsible tourism has seen the country promote community-based tourism projects that enable visitors to engage with local cultures while supporting conservation efforts (KTB, 2021). As a result, local communities have benefitted from tourism activities, helping to ensure their support for wildlife conservation and sustainable practices. In 2022, Kenya was recognized for its robust recovery efforts when the World Travel Awards named it Africa's Leading Destination. This accolade highlights the country’s continued appeal as a tourist hub and reflects the resilience of its tourism sector as it adapts to a post-COVID world (World Travel Awards, 2022).

Furthermore, investments in infrastructure aimed at improving connectivity to major tourist attractions have been crucial in accelerating the recovery process. The expansion of air travel routes and enhancements to road networks have improved access to key destinations, making it easier for both international and domestic tourists to explore the rich offerings of Kenya (World Bank, 2021). As of 2024, Kenya is witnessing a remarkable recovery in its tourism sector. The country welcomed approximately 2.1 million international tourists in 2023 according to the data provided by UNWTO, with projections to reach about 2.42 million in 2024, marking a robust growth trend. This resurgence has been supported by a projected revenue generation of around \$2 billion for the tourism sector in 2024, up from \$1 billion in 2023, as indicated by the Kenya National Bureau of Statistics. As a result of this steady growth, Kenya was ranked 5th in the Africa

Travel and Tourism Competitiveness Report 2023 by the World Economic Forum and 77th position globally as ranked by Travel & Tourism Development Index 2024 overall rankings.

International Tourism Arrivals and Receipts 2019-2023

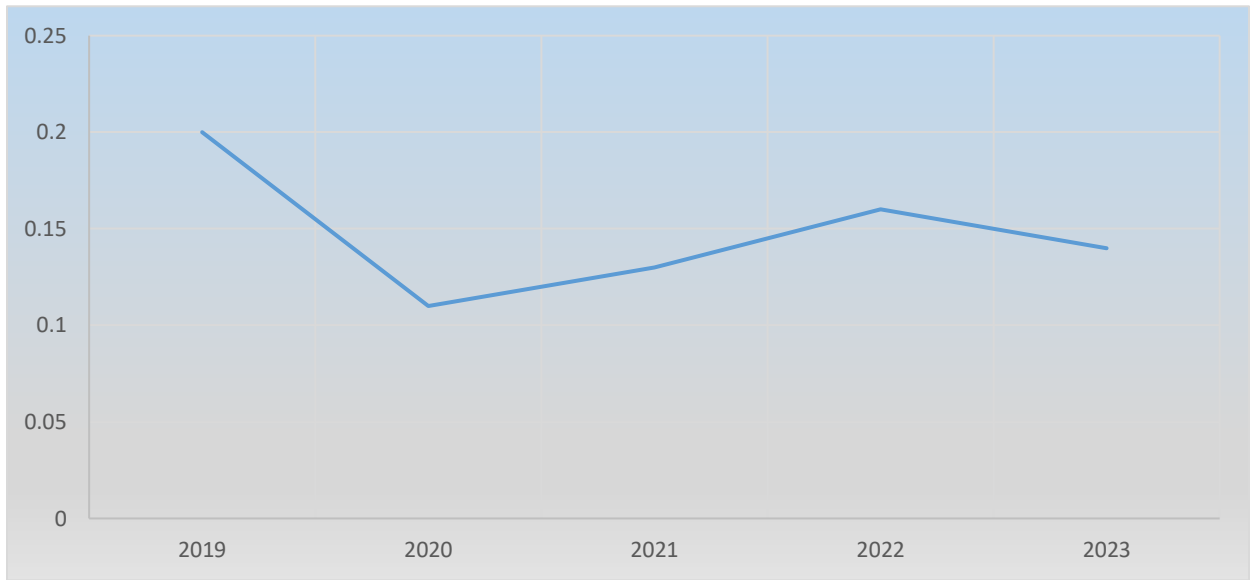


Source: UNWTO, 2024

The data on Kenya's international tourism expenditure from 2019 to 2023 as shown in the chart below reveals the impact of global events and gradual recovery trends in the tourism sector. In 2019, Kenya's international tourism expenditure was at its peak, reaching USD 0.2 billion, reflecting a stable and vibrant tourism market. However, this figure sharply declined to USD 0.11 billion in 2020, coinciding with the onset of the COVID-19 pandemic, which disrupted global travel and significantly reduced tourism-related spending.

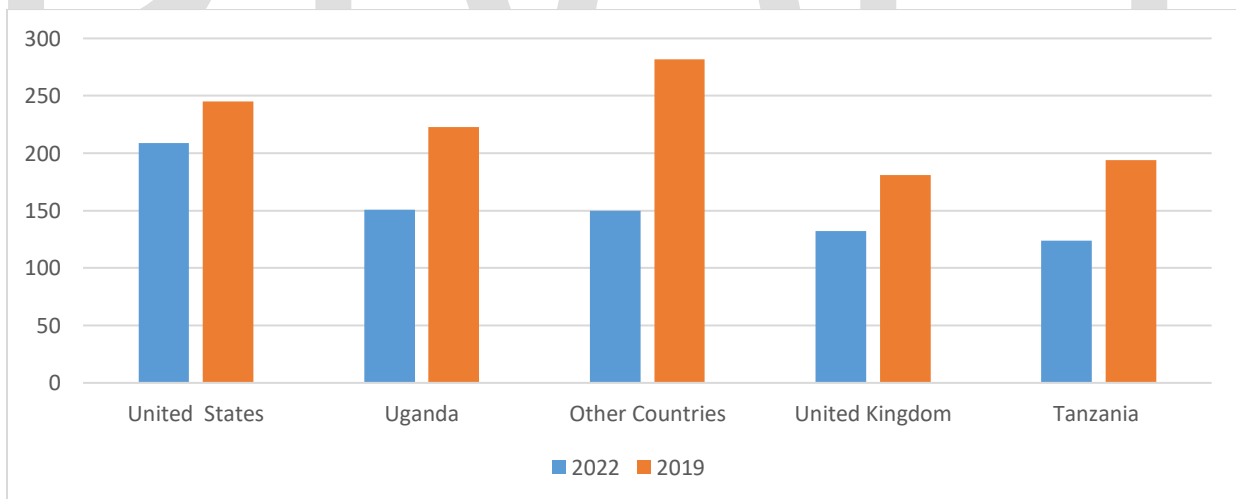
A gradual recovery is evident from 2021, with expenditures increasing to USD 0.13 billion and further rising to USD 0.16 billion in 2022, indicating the sector's efforts to regain its footing as travel restrictions eased. However, in 2023, the expenditure slightly dipped to USD 0.14 billion, suggesting that while the recovery is ongoing, challenges such as changing travel patterns or economic factors may have influenced spending.

Kenya international tourism expenditure (USD billions) 2019-2023



The data on tourist flows to Kenya provides a clear picture of the country's key source markets and the ongoing recovery of its tourism sector following the disruptions caused by the COVID-19 pandemic. While Kenya remains a popular destination, the numbers reveal both strengths and challenges that need to be addressed to fully restore and grow the tourism industry.

Tourism Top Source Markets for Kenya 2022



The United States continues to be Kenya's largest source market, contributing 209,000 tourists in 2022. However, this figure represents a decline from 245,000 in 2019, indicating that the U.S. market has not yet fully rebounded to pre-pandemic levels. Given the high spending power of American tourists, this market remains critical for Kenya's tourism economy. Efforts to restore and grow this segment should include targeted marketing campaigns, improved air connectivity, and tailored travel experiences that cater to American preferences, such as luxury safaris and eco-tourism.

Regional neighbors Uganda and Tanzania also play a significant role in Kenya's tourism landscape. In 2022, Uganda contributed 151,000 tourists, down from 223,000 in 2019, while Tanzania contributed 124,000, compared to 194,000 in 2019. These declines suggest that intra-regional travel within East Africa has not fully recovered. To revitalize this segment, Kenya should strengthen regional partnerships, promote cross-border tourism initiatives, and simplify travel procedures to encourage more visitors from neighboring countries. Joint marketing campaigns and regional tourism packages could also help attract more tourists from these markets.

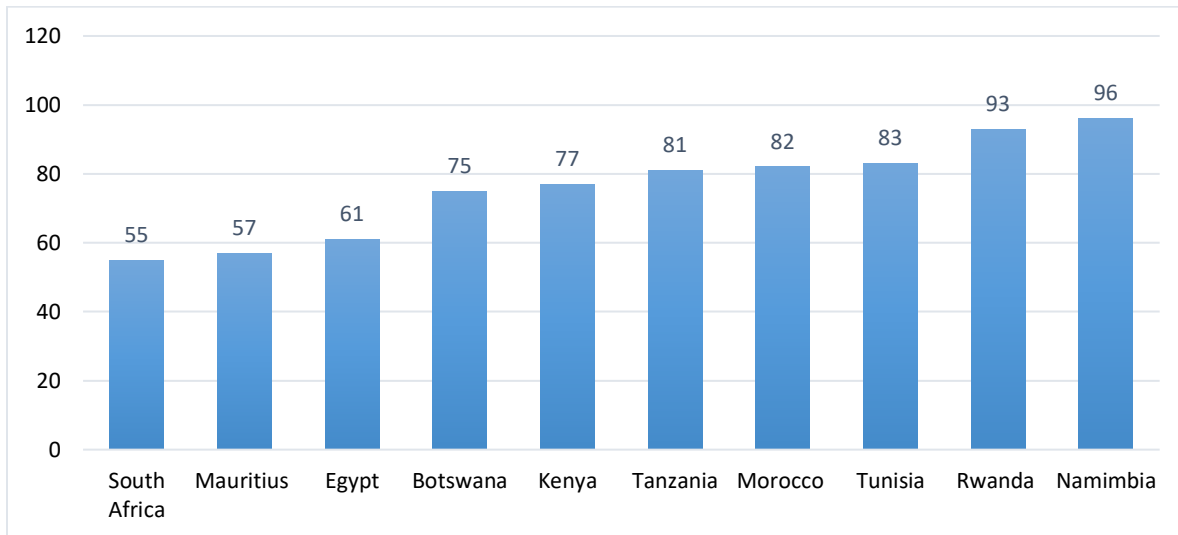
The United Kingdom, another key source market, contributed 132,000 tourists in 2022, down from 181,000 in 2019. The UK remains a vital market for Kenya, particularly for leisure and safari tourism. To accelerate recovery in this market, Kenya should enhance its marketing efforts, improve flight connectivity, and offer tailored travel packages that appeal to British tourists. Additionally, addressing any lingering concerns about health and safety post-pandemic could help rebuild confidence among UK travelers.

The category labeled "Other Countries" saw a significant decline, dropping from 282,000 tourists in 2019 to 150,000 in 2022. This category likely includes a mix of emerging and smaller markets, and the sharp decline highlights the need for Kenya to diversify its tourist base. Exploring opportunities in emerging markets in Asia, the Middle East, and Europe could provide new growth avenues. For instance, countries like China, India, and the Gulf states represent untapped potential due to their growing middle classes and increasing interest in international travel.

2.3.1 Competitive Analysis of Kenya's Tourism Industry

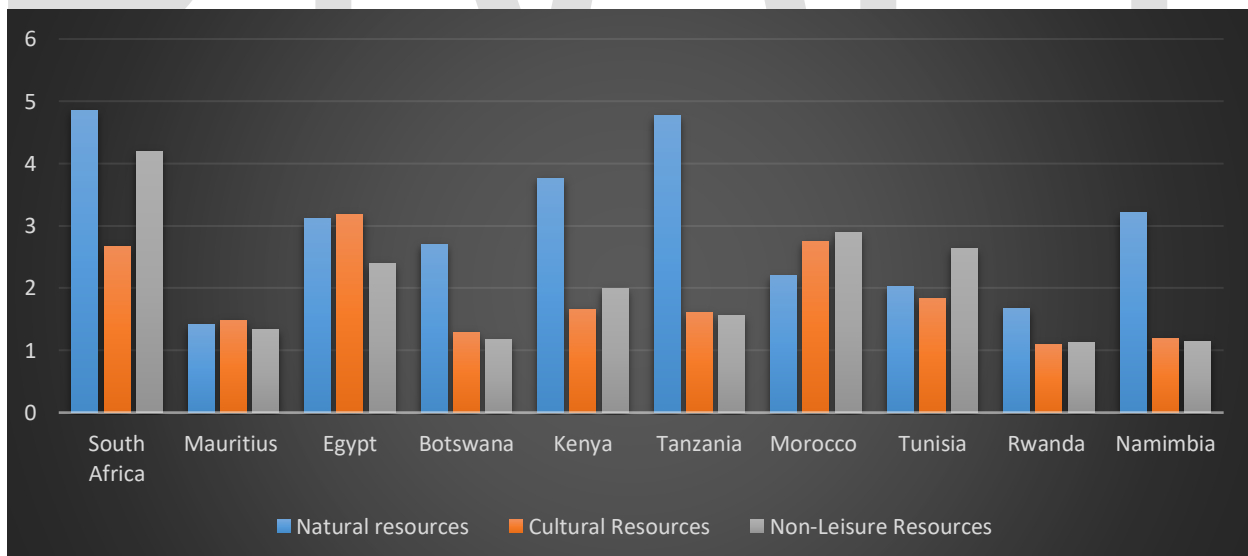
Kenya's position in the Travel and Tourism Competitiveness Index (TTDI) 2024 provides valuable insights into its strengths and areas for improvement as a tourist destination. Ranked **77th globally** and **5th among African countries**, Kenya demonstrates significant potential but also faces challenges that need to be addressed to enhance its competitiveness. South Africa, Mauritius, Egypt, and Botswana rank higher, indicating that Kenya has room to grow, particularly in areas such as health and hygiene, infrastructure, and digital readiness.

Global TTDI rankings for top ten African Countries



One of Kenya's key strengths lies in its **natural resources**, scoring **3.76**, which is competitive but slightly behind regional leaders like South Africa (**4.86**) and Tanzania (**4.77**). Kenya's diverse landscapes, wildlife, and iconic attractions such as the Maasai Mara and Mount Kenya are already major draws for tourists. However, the country scores lower in **cultural resources** (**1.66**), suggesting that Kenya's rich cultural heritage, including its ethnic diversity, historical sites, and traditional practices, is underutilized. Greater investment in cultural tourism could unlock new opportunities and diversify the tourism offering.

Travel and Tourism Resources: Kenya vs Selected Regional Destinations



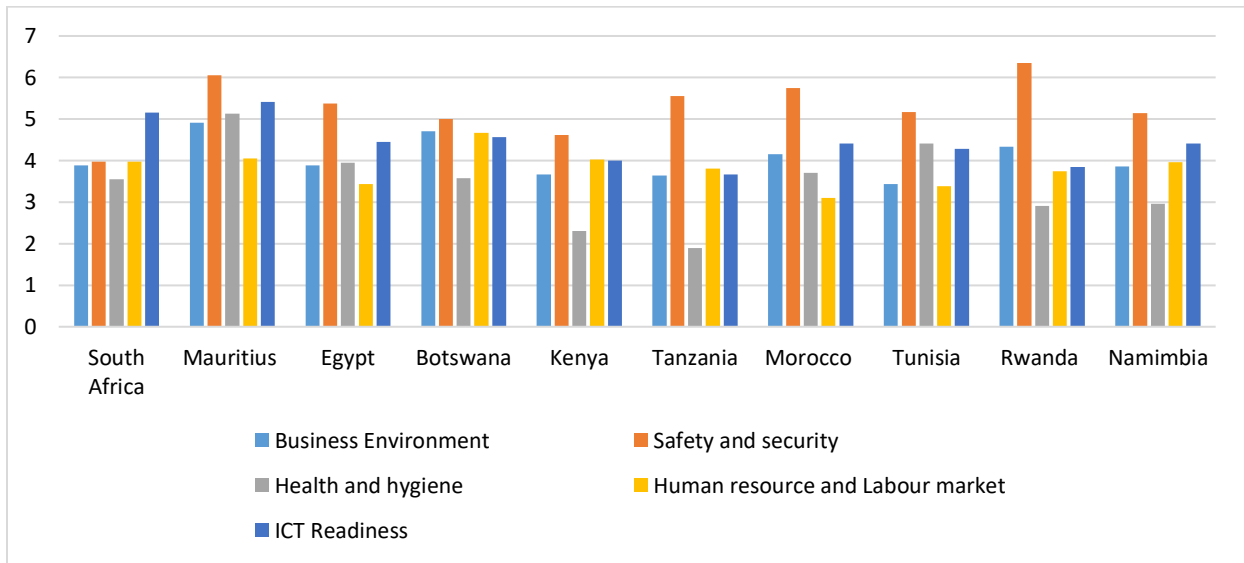
In terms of **infrastructure**, Kenya faces notable challenges. The country scores **3.21** in air transport infrastructure, which, while moderate, lags behind Egypt (**4.58**) and Mauritius (**4.12**). Ground and port infrastructure also scores **3.23**, indicating a need for significant upgrades to facilitate smoother travel experiences. Most concerning is the score of **1.25** in tourist services and infrastructure, the lowest among the top ten African countries. This highlights a critical gap in the quality and availability of services such as accommodation, dining, and entertainment, which are essential for attracting and retaining tourists.

Tourism Infrastructure and Services: Kenya vs Selected Regional Destinations

Country	Air Transport Infrastructure	Ground and port Infrastructure	Tourist Services and Infrastructure
South Africa	3.69	3.33	2.41
Mauritius	4.12	3.9	3.12
Egypt	4.58	3.85	2.76
Botswana	2.08	2.93	3.76
Kenya	3.21	3.23	1.25
Tanzania	2.94	3.29	1.41
Morocco	3.65	3.33	2.31
Tunisia	2.95	2.69	2.69
Rwanda	2.4	3.22	1.41
Namibia	2.37	3.25	2.26

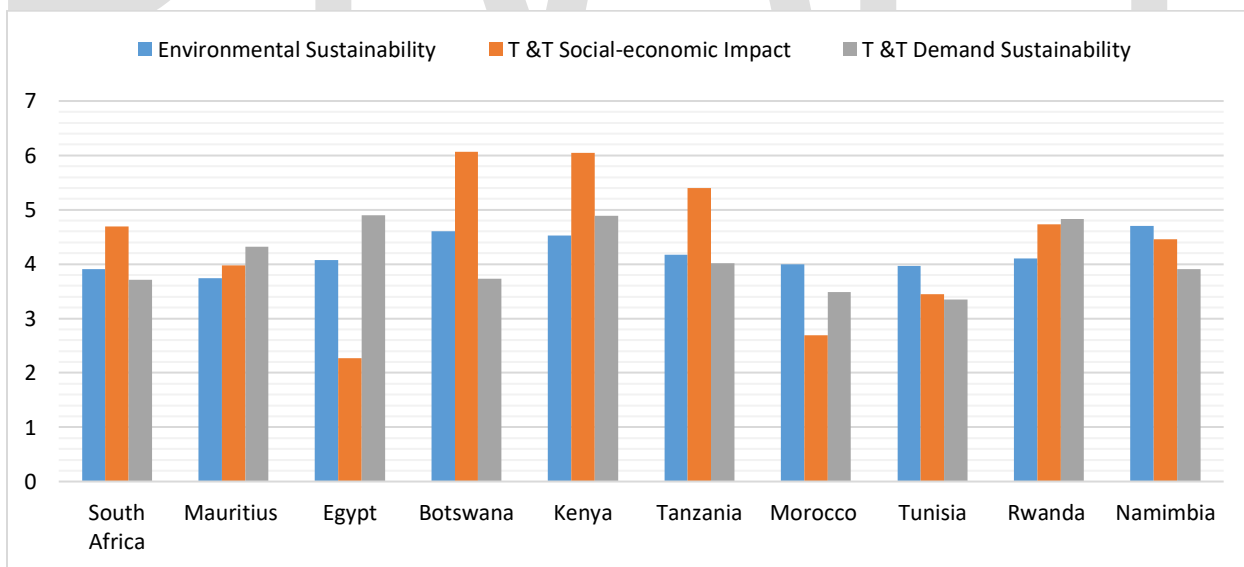
Kenya's **enabling environment** presents a mixed picture. The country scores **4.03** in human resources and labor market readiness, reflecting a relatively skilled workforce in the tourism sector. However, the **business environment** score of **3.66** is lower than regional leaders like Mauritius (**4.91**) and Botswana (**4.71**), suggesting that bureaucratic inefficiencies and regulatory hurdles may hinder tourism development. Additionally, Kenya's **health and hygiene** score of **2.31** is the lowest among the top ten African countries, a critical area that needs immediate attention to ensure tourist safety and confidence, especially in the post-pandemic era.

Tourism Enabling Environment: Kenya vs Selected Regional Destinations



As indicated in the TTDI report 2024, Kenya performs well in **sustainability**, a key factor for long-term tourism growth. The country scores **4.53** in environmental sustainability, reflecting its commitment to conservation and eco-tourism. Kenya's **socio-economic impact** score of **6.05** is the highest among African countries, underscoring the tourism sector's significant contribution to job creation, community development, and economic growth. Furthermore, Kenya's **demand sustainability** score of **4.89** indicates strong and resilient tourist demand, comparable to Egypt (**4.90**) and Rwanda (**4.83**).

Travel and Tourism Sustainability: Kenya vs Selected Regional Destinations



In terms of **policy and enabling conditions**, Kenya scores **4.85** in the prioritization of travel and tourism, reflecting a strong government commitment to the sector. However, the **openness to travel and tourism** score of **3.46** suggests that visa policies, international partnerships, and marketing efforts could be further enhanced to attract more visitors. Kenya’s **price competitiveness** score of **5.08** is solid but trails behind Egypt (**6.11**) and Tunisia (**5.94**), indicating that cost-effective travel packages and value-for-money experiences could be better promoted.

Travel and Tourism Policy and Enabling Conditions: Kenya vs Selected Regional Destinations



2.4 Summary of Kenya's Tourism SWOT Analysis

PRODUCT DEVELOPMENT AND DIVERSIFICATION

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> ○ Strong core tourism experiences (e.g., African safari, wildlife). ○ Diverse natural and cultural resources. ○ Established tourism infrastructure in key regions (e.g., Maasai Mara, Coast). ● Established Wildlife Safari and Beach Products: Kenya is a pioneer for the wildlife safari, which remains a unique selling point and the backbone of its tourism. Beach tourism also caters to a significant number of visitors. ● Product Development Initiatives: Projects like the Mama Ngina Waterfront and the Cruise Terminal in Mombasa, along with the refurbishment of KICC, demonstrate efforts in product development ● Global Recognition in Athletics: Kenya's leadership in athletics presents an opportunity for sports tourism development. ● Rich Cultural Heritage: Diverse cultural heritage offers significant potential for cultural tourism development. ● Diverse landscapes (beaches, mountains, lakes). ● Potential for niche experiences (e.g., marathon tourism, kite-surfing). 	<ul style="list-style-type: none"> ○ Limited product diversity and underdeveloped niche markets. ○ Some products are outdated or require refurbishment. ● Over-dependence on Limited Products, core experiences and regions: Heavy reliance on wildlife and beach tourism, with underdeveloped niche products. ● Overcrowding in popular parks. ● Poor infrastructure in emerging destinations. ● Limited marketing of non-safari attractions. 	<ul style="list-style-type: none"> ○ Potential to develop and promote niche products eg eco-tourism, adventure tourism, cultural tourism, health and wellness tourism, sports tourism ○ Integration of technology and innovation in product development. ● Developing year-round tourism products (e.g., birdwatching, festivals). ● Tapping into MICE (Meetings, Incentives, Conferences, Exhibitions) tourism. ● Partnerships with global event organizers. 	<ul style="list-style-type: none"> ○ Environmental degradation ● Over-commercialization of core experiences leading to loss of authenticity ● Competition from destinations with better-developed niche offerings. ● Climate change affecting natural attractions.

DESTINATION MARKETING AND PROMOTION

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Established relationships with traditional markets (USA, UK). • Growing interest in Kenya from emerging markets (China, UAE). • Strong diaspora and global Kenyan networks. • Strong global recognition of Kenya's wildlife and natural beauty. • Established "Magical Kenya" brand with a focus on authenticity and diversity. • National ban on hunting and leadership in conservation. • World-renowned wildlife and natural attractions (e.g., Maasai Mara, Amboseli). • Diverse landscapes (mountains, lakes, beaches, savannahs). • Potential for niche experiences (e.g., birdwatching, kite-surfing). • Diverse tourism experiences to market. • Growing Domestic Tourism with potential to propel the sector and provide cushioning from external shocks. • Streamlined Visa Processes through the Electronic Travel Authorization (ETA) system. 	<ul style="list-style-type: none"> • Reliance on traditional marketing methods (e.g., roadshows). • Limited marketing budget compared to competitors. • Lack of tailored marketing campaigns for niche segments. • Over-reliance on safari tourism, limiting diversification. • Negative perceptions of safety and cleanliness in some areas. • Limited awareness of Kenya's all-year-round tourism potential. • Overcrowding in popular parks during peak seasons. • Poor infrastructure in less-visited parks and coastal areas. • Limited development of niche tourism products. • Over-dependence on a few source markets (e.g. UK, USA). • Weak linkages among stakeholders. • Uncoordinated marketing efforts. • Lack of representation in some overseas markets. • Limited marketing impact assessment. 	<ul style="list-style-type: none"> • Expanding digital marketing to reach younger, tech-savvy travelers. • Developing tailored campaigns for high-potential markets (e.g., China, UAE). • Strengthening partnerships with global travel agencies and influencers. • Potential to attract high-value tourists through upmarket branding. • Leveraging Kenya's cultural and historical diversity to attract niche markets. • Developing all-year-round tourism products to reduce seasonality. • Creating unique niche experiences (e.g., cultural tours, adventure sports). • Expansion into Asian, Middle Eastern, and African markets. • Strengthening county-level tourism marketing. • Growing Global Tourism Demand. • Advances in technology including AI, AR, VR, and online platforms can enhance market research, booking, and visitor experiences. • Potential to market East Africa and IGAD as a single tourist destination and benefit from regional tourism protocols. • Potential of domestic and regional tourism to provide market stability and support local economies. • Potential for development of new source markets including Africa to broaden the visitor base. 	<ul style="list-style-type: none"> • Competition from destinations with larger marketing budgets and those offering similar experiences • Negative travel advisories impacting tourist perceptions. • Economic downturns in key source markets reducing travel demand. • Competition from other African destinations (e.g., Tanzania, South Africa). • Environmental degradation due to over-tourism. • Climate change impacting wildlife migrations and natural attractions. • Negative global media coverage impacting Kenya's image. • Stronger marketing campaigns from competitors. • Changes in Consumer Preferences: Rapid shifts in traveler preferences require constant adaptation and innovation. • External Shocks: Unforeseen global events, natural disasters, or geopolitical tensions can disrupt tourism flows.

DESTINATION ACCESSIBILITY AND SUPPORT INFRASTRUCTURE

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • JKIA serves as a regional aviation hub with good international connectivity. • Existing road networks connect major tourism regions. • Growing adoption of digital payment systems in Kenya. 	<ul style="list-style-type: none"> • Poor road conditions in key tourist destinations. • Limited air access to remote tourism destinations. • Over-reliance on a few key airports. • Deficiencies in key utilities including water and waste management, electricity, and ICT infrastructure • Lack of digital tools for seamless tourism services. • Cybersecurity risks associated with digital transformation. • Relatively low uptake of modern communication technologies compared to competing destinations • Limited Wi-Fi connectivity in parks. 	<ul style="list-style-type: none"> • Expansion of tourism corridors and air routes. • Integration of innovative transport solutions (e.g., rail, drones). • Smart infrastructure and eco-friendly tourism projects. • Public-private partnerships (PPPs) for infrastructure development. • Remote Work and Digital Nomadism • Expansion of regional airports (e.g., Diani, Malindi). • Smart tourism solutions (e.g., e-visas, digital park bookings). 	<ul style="list-style-type: none"> • Failure to adequately develop and maintain supporting infrastructure can hinder growth. • High costs of infrastructure development. • Bureaucratic delays in infrastructure projects. • Competition from other regional hubs (e.g., Addis Ababa, Dar es Salaam). • Environmental and social challenges in infrastructure projects.

VISITOR SAFETY AND SECURITY

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Established disaster management institutions • International disaster risk reduction commitments • Devolved governance structure • Availability of disaster-related data • Active counterterrorism measures • Regional and international security collaboration 	<ul style="list-style-type: none"> • Technological gaps in security systems • Fragmented legal framework • Lack of political will • Corruption and resource constraints • Inadequate early warning systems • Coordination challenges among involved institutions 	<ul style="list-style-type: none"> • Enactment of national disaster preparedness law • Technological innovation in early warning and security management • Community-based disaster risk management • International technical and financial support • Integration of artificial intelligence in security • Cybersecurity legislation and frameworks 	<ul style="list-style-type: none"> • Institutional overlaps • Public mistrust and social unrest • Ethnic tensions and electoral violence • Climate change impacts • Economic constraints • Persistent terrorism threats

INVESTMENT PROMOTION AND INCENTIVES

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Established tourism industry with strong potential for expansion. • Improving national investment environment • Strategic location as an East African gateway • Growing interest from emerging markets (China, India). 	<ul style="list-style-type: none"> • Complex regulatory framework for investors. • Lack of clear incentives for tourism investors. • Limited investor awareness of tourism opportunities. • Limited financial support for small tourism enterprises • Limited resources, inadequate financing mechanisms, and high-interest rates affect product development, marketing, and infrastructure. <ul style="list-style-type: none"> ▪ Limited financial resources for implementing quality resources • Interference in enforcement of quality standards • Challenges in enforcing sustainability standards noting their voluntary nature • Classification of hotel facilities is voluntary. 	<ul style="list-style-type: none"> • Expressed aspirations for development of flagship tourism projects (e.g., resort cities, convention centers). • Green bonds and eco-tourism investments. • Attracting investments from emerging economies (China, India). • Kenya's strategic location as a tourism hub and gateway to East Africa 	<ul style="list-style-type: none"> • Economic instability affecting investor confidence. • Competition from other African nations offering better incentives. • Political and security risks deterring investment.

HUMAN RESOURCE DEVELOPMENT

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Warm and friendly Kenyan hospitality. • Existing training institutions (e.g., Kenya Utalii College). 	<ul style="list-style-type: none"> • Shortage of skilled personnel in niche tourism areas. • Limited focus on continuous skills development. • Limited investment in tourism education and training. • Discrepancy between training outcomes and industry needs, affecting service quality. 	<ul style="list-style-type: none"> • International training partnerships for skill transfer • Vocational training programs targeting youth employment. • Promoting entrepreneurship in tourism training. 	<ul style="list-style-type: none"> • Brain drain as skilled workers seek international opportunities. • Resistance to innovation in tourism workforce. • Lack of funding for training programs

RESEARCH AND KNOWLEDGE MANAGEMENT

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Existing research institutions (e.g., Tourism Research Institute). • Growing interest in data-driven decision-making. 	<ul style="list-style-type: none"> • Limited funding for research and data collection. • Lack of coordination in tourism research efforts. • Lack of real-time data on tourist behavior. • Fragmented data sources and lack of centralized databases • Inconsistencies in tourism data reporting • The need for adequate funding and human resources for tourism research. 	<ul style="list-style-type: none"> • Using technology to improve data collection. • Creating a national tourism research hub • Partnering with international organizations for research. 	<ul style="list-style-type: none"> • Resistance of some stakeholders to share data. • Rapid changes in tourism trends require constant research.

2.5 PESTEL Analysis of Kenya's Tourism Sector

ELEMENT	OPPORTUNITIES	THREATS
Political Factors	<ul style="list-style-type: none"> • Devolution and county-level tourism development • Regional integration (EAC, COMESA, AfCFTA) • Stable policy frameworks (e.g., Vision 2030, Tourism Blueprint) • Regional peace and diplomacy initiatives • Government prioritization of tourism in economic planning 	<ul style="list-style-type: none"> • Election-related unrest and political tension • Insecurity and terrorism threats (e.g., Al-Shabaab) • Travel advisories from source markets • Jurisdictional conflicts (national vs county governments) • Weak policy enforcement and political interference
Economic Factors	<ul style="list-style-type: none"> • Growing domestic and regional tourism market • Diaspora remittances and travel • Tourism linkages with other sectors (agriculture, transport) • Job creation in rural and marginalized areas • Investment interest in hotel and resort development 	<ul style="list-style-type: none"> • High cost of doing business • Fluctuating foreign exchange rates • Global economic slowdowns and inflation • Fiscal constraints limiting tourism investment • Dependence on international arrivals for revenue
Social Factors	<ul style="list-style-type: none"> • Youthful population for tourism workforce • Cultural diversity for heritage and cultural tourism • Rise in interest in community-based tourism • Increasing domestic travel among middle class • Diaspora influence in tourism promotion 	<ul style="list-style-type: none"> • Unequal tourism development across regions • Cultural erosion and commodification • Urbanization and pressure on tourist sites • Social exclusion or displacement by tourism development • Limited tourism awareness in some communities
Technological Factors	<ul style="list-style-type: none"> • Growth of digital marketing and e-booking platforms • Mobile money and cashless transactions • Virtual reality and augmented reality tourism • Data analytics for destination management • Online training and e-learning in tourism 	<ul style="list-style-type: none"> • Limited digital access in rural tourism areas • Cybersecurity risks and online fraud • Slow tech adoption in public tourism institutions • Inadequate funding for tourism tech solutions • Poor integration of data systems across agencies
Environmental Factors	<ul style="list-style-type: none"> • Eco-tourism and green certification programs • Expansion of community conservancies • Marine and coastal tourism under blue economy • Reforestation and carbon offset tourism projects • Climate-smart infrastructure initiatives 	<ul style="list-style-type: none"> • Climate change (droughts, floods, rising sea levels) • Wildlife habitat loss and human-wildlife conflict • Pollution and poor waste management • Coral reef degradation and marine ecosystem loss • Over-tourism in fragile ecosystems
Legal Factors	<ul style="list-style-type: none"> • Tourism Act and investment-friendly laws • Potential for harmonized county regulations • International legal cooperation and treaties • Simplification of licensing and compliance procedures • Intellectual property protection for local cultural products 	<ul style="list-style-type: none"> • Overlapping legal mandates between institutions • Weak law enforcement and compliance monitoring • Land tenure disputes affecting tourism sites • Bureaucratic red tape deterring investors • Gaps in labor, safety, and environmental regulations enforcement

3.0

THE KENYA NATIONAL TOURISM STRATEGY 2025-2030

DRAFT

3.1 RATIONALE FOR THE NTS 2025-2030

Kenya's tourism sector remains a critical pillar of its socio-economic development, contributing significantly to GDP, employment, foreign exchange earnings, and rural development. However, the industry has faced recurring challenges including overdependence on traditional tourism markets and products, inadequate infrastructure in emerging destinations, climate change impacts, regional and global economic shocks, and evolving traveler expectations driven by technology, health concerns, and sustainability awareness.

The National Tourism Strategy 2025–2030 is designed to address these challenges and position Kenya as a globally competitive, inclusive, and sustainable tourism destination. The strategy builds upon lessons learned from previous frameworks and aligns with national priorities outlined in Kenya Vision 2030, the Bottom-Up Economic Transformation Agenda (BETA), and international commitments such as the Sustainable Development Goals (SDGs), African Union's Agenda 2063, Draft National Tourism Policy, Draft National Tourism Marketing Strategy, MICE strategy, and Strategic plans of the MoTW and key state agencies.

Key justifications for this strategy include:

1. *Diversification of tourism products and markets:* Kenya's tourism has historically been centered on beach and wildlife offerings. This strategy promotes product diversification to include cultural heritage, adventure, agri-tourism, eco-tourism, sports, and wellness tourism. It also seeks to expand market reach by targeting emerging economies and regional travelers to reduce reliance on traditional Western markets.
2. *Sustainability and climate resilience:* With growing concerns about climate change and environmental degradation, the strategy emphasizes green tourism practices, conservation, and sustainable resource use. This will enhance Kenya's long-term tourism competitiveness while contributing to global environmental goals.
3. *Digital transformation and innovation:* Technological advancement is reshaping how travelers plan and experience tourism. The strategy aims to enhance digital infrastructure, adopt smart tourism tools, and promote innovation across the value chain to improve service delivery and competitiveness.
4. *Community inclusion and shared prosperity:* Tourism should benefit all Kenyans, especially communities near key attractions. The strategy promotes community-based tourism, equitable revenue sharing, capacity building, and inclusion of youth, women, and marginalized groups in the tourism economy.

5. *Infrastructure and investment promotion:* Enhancing access to tourism sites through better transport, utilities, and hospitality facilities is critical. The strategy will guide public-private partnerships and targeted investments to improve infrastructure and unlock underutilized tourism assets across the country.
6. *Crisis preparedness and sector resilience:* Lessons from the COVID-19 pandemic underscored the need for robust contingency planning. The strategy outlines mechanisms for crisis response, health and safety standards, and financial safety nets to mitigate future shocks.
7. *Brand positioning and international competitiveness:* To remain relevant in a crowded global market, Kenya must refine its brand and marketing strategies. The strategy advocates for cohesive destination branding, data-driven marketing, and leveraging Kenya's rich biodiversity and cultural wealth to attract high-value visitors.

In sum, the National Tourism Strategy 2025–2030 provides a comprehensive, forward-looking framework to transform Kenya's tourism landscape into a resilient, inclusive, and sustainable engine for national development.

3.2 PROCESS OF PREPARING THE NTS 2025-2030

.....To include.....

3.3 UNDERPINNING NATIONAL, REGIONAL AND GLOBAL DEVELOPMENT FRAMEWORKS

The NTS 2025-2030 is aligned with, and seeks to make contribution towards realization of the aspirations of several frameworks and their linkage with the national development priorities. Key frameworks include:

3.3.1 Regional and international frameworks

- i. United Nations 2030 Agenda for Sustainable Development (SDGs):** The SDGs spell out the seventeen (17) areas that requires 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.
- ii. African Union Agenda 2063:** The African Union Agenda 2063 is founded on the AU’s vision of “an integrated, prosperous and peaceful Africa, driven by its own citizens and representing a dynamic force in the international arena”. The agenda asserts that Africa has still not reaped the benefits that accrue from trading with itself or with the rest of the world, resulting in a share of global trade that is not commensurate with its population or resource endowments. The Agenda specifically identifies tourism as a key economic sector for the region’s economic transformation and as a driver for continental integration, and as a source sector for Domestic Resource Mobilization (DRM) towards financing implementation of the Agenda 2063. In view of this recognized potential, the AU Agenda 2063 identifies ‘*making Africa the preferred destination for tourism*’ as one of its flagship projects. Cognizant of the aspirations of this Agenda, The NTS (2025-2030) seeks to support efforts made by Kenya in implementing its commitments. More specifically, the attainment of aspirations 1 and 5 of Africa’s Agenda 2063 on ‘*A prosperous Africa based on inclusive growth and sustainable development*’ and ‘*An Africa with a strong cultural identity, common heritage, shared values and ethics*’, respectively.
- iii. The African Continental Free Trade Area (AfCFTA):** AfCFTA seeks to accelerate intra-African trade and boost Africa’s trading position in the global market. On liberalization of trade in services, the AfCFTA identifies tourism as one the seven priority sectors. This NTS seeks to strategically position Kenya to benefit from the greater market access for tourism businesses and operators, economies of scale in production and quality supply of tourism goods and services, better opportunities for

networking and complementarity for the tourism industry, reduced tourism services costs, facilitating investment in vital tourism infrastructure, and enhanced collaboration among tourism businesses and operators and their eventual participation in regional tourism value chains.

- iv. African Tourism Strategic Framework (2019-2028) (ATSF 2019-2028):** This framework is formulated in line with the recognized socio-economic potential of the tourism industry as espoused in the AU Agenda 2063 flagship of *'making Africa the preferred destination for tourism'* and the requisite need for a continental tourism development framework as spelt out the First Ten-Year Implementation Plan of the Agenda 2063, the Seychelles Communiqué 2014, the 2017 Lomé Ministerial Declaration, and the Plan of Action for Tourism (2017-2019).
- v. IGAD regional Sustainable Tourism Master Plan (2024-2034):** The Vision of the IGAD STMP 2024-2034 is to position the IGAD region as a cohesive, globally competitive, and sustainable tourist destination.
- vi. East African Community (EAC) Tourism Protocol:** Compliance with the EAC Tourism Protocol provisions aimed at facilitating cross-border tourism, harmonizing tourism policies, and enhancing regional cooperation in tourism development. Specifically, the NTS seeks to support the EAC integration by implementing the commitments made by the Sectoral Council on Tourism matters which include:
 - a) *Aggressive marketing in key source markets focusing on increasing visibility.*
 - b) *Product development and diversification.*
 - c) *Establishing centres of excellence in tourism and hospitality training in partnership with the private sector.*
 - d) *Investing in tourism support infrastructures such as ICT, accommodation and transport.*
 - e) *Facilitating implementation of the EAC classification and grading criteria.*

3.3.2 National frameworks

i) The Constitution of Kenya

The Constitution of Kenya 2010 serves as the supreme law, defining the government structure and the relationship between the state and its citizens. The Fourth Schedule allocates the responsibilities for tourism policy and development to the national government while assigning local tourism development to county governments.

The National Tourism Strategy (2025-2030) recognizes the role of both national and county governments in developing a competitive tourism in the country and engenders a collaborative approach to its development.

ii) Kenya Vision 2030 and its Fourth Medium Term Plan (MTP IV)

The Kenya Vision 2030 guides Kenya’s long-term development agenda. It aims at transforming Kenya into a newly industrialized, middle-income country, providing a high quality of life to all citizens in a clean and secure environment. The Vision is anchored on three pillars – economic, social and political. It identifies tourism as a key sector under the economic and social pillars that envisages Kenya to be among the “*top ten long haul and leading tourist destination offering a high end, diverse and distinctive visitor experience*”.

The Kenya Vision 2030 is implemented through five-year successive Medium-Term Plans. Currently, the country is implementing the Fourth Medium Term Plan (2023–2027). In MTP IV period, the State Department of Tourism targets include: to increase tourism arrivals from 0.87 million in 2021 to 2.4 million by 2027; increase tourism earnings from KShs.146.5 billion in 2023 to KShs. 395 billion by 2027; increase bed nights from 3.8 million in 2021 to 11 million by 2027; increase total visitation to parks and reserves from 1.3 million in 2021 to 6.8 million by 2027; increase the proportion of international tourists visiting parks and reserves from 23% in 2021 to 51.9% by 2027; and increase number of citizens and residents visiting parks from 1.09 million in 2021 to 5.6 million in 2027.

Towards realization of Vision 2030’s aspiration and the related targets by the State Department of Tourism, the National Tourism Strategy (2025-2030) provides specific programs and initiatives geared towards this goal.

iii) Bottom-Up Economic Transformation Agenda (BETA)

The Bottom-Up Economic Transformation Agenda (BETA) is geared towards economic turnaround and inclusive growth. This National Tourism Strategy provides programs and initiatives that would result in realization of the Bottom-Up Economic Transformation Agenda (BETA) aspirations including

- **Creation of employment** with specific focus on creating tourism-related jobs and supporting local businesses with a focus on empowering youth and women;
- **Expanding tax revenue base** through promoting investments, generation of employment, and expenditure opportunities in the sector aimed at widening the country’s tax base.

- **Improved Foreign exchange earnings** through strategies aimed at increasing international arrivals and expenditure thus increasing the country's foreign earnings.
- **Enhanced digitalization of the tourism sector with focus on destination promotion**, developing and maintaining an online Tourism Repository (Tourism Portal) as a one-stop shop for the country's tourism products, and development of a Destination Management System with a booking option.

3.3.3 Sector Policies and Laws

The NTS is formulated in alignment with the existing tourism sector policies and laws including:

- i) **National Tourism Policy (NTP) 2025.** The National Tourism Strategy provides measures geared towards realization of the NTP goal of *transforming Kenya's tourism sector into an internationally competitive and sustainable sector*, and its objectives including:
 - a) *Promotion of sustainable tourism that enhances economic development, environmental sustainability and encourage community participation.*
 - b) *Providing legal and institutional framework for effective coordination and management of the tourism sector.*
 - c) *Facilitating development and implementation of quality tourism standards.*
 - d) *Integrate tourism sector needs into the relevant sectorial policies, National and County development planning.*
 - e) *Mobilizing resources for sustainable Tourism development and management*
 - f) *Promoting and supporting the provision of incentives and other economic instruments that enhance investment in the sector.*
 - g) *Promoting tourism products that respond to changes in consumer needs.*
 - h) *Promoting research, innovation and uptake of new technology in the sector.*
 - i) *Enhancing collaboration, cooperation, synergy, partnerships and participation in the tourism sector by all levels of Government and all stakeholders.*
- ii) **The Tourism Act Cap 381** – The Tourism Act Cap 381 provides for the development, management, marketing and regulation of sustainable tourism and tourism-related activities and services.
- iii) **National Museums and Heritage Act Cap 216** – The Act provides for the establishment, control, management and development of national museums and the identification, protection, conservation and transmission of the cultural and natural heritage of Kenya.
- iv) **Public Finance Management Act, Cap 412 A** – The Act established the Tourism Promotion Fund whose objective and purpose is to provide funds to support development, promotion and branding of the tourism sector.

3.4 BUILDING ON THE PREVIOUS NATIONAL TOURISM STRATEGIES

3.4.1 Lessons learnt from implementation of the previous NTS

As highlighted in the National Tourism Policy (2025), a number of key lessons can be drawn from the implementation of the past strategies that are significant to future planning for Kenya's tourism development, viz,

1. **Tourism Products:** Kenya overly depends on two major traditional nature based Tourism products, namely; beach and wildlife safari. There is need to diversify to other niche products.
2. **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 travelers increasingly favoring destinations that demonstrated stringent hygiene practices and comprehensive safety measures.
3. **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.
4. **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.
5. **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.
6. **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.
7. **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.
8. **Regional Collaboration:** Collaboration, peace, and integration are crucial in expanding market base and for harmonizing and standardizing regional tourism development issues.
9. **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 elevate a destination's profile in the international market.

10. **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.
11. **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.
12. **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.
13. **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 travelers research, book, and engage with destinations. This evolution highlights the need for continuous technological adoption to stay competitive.
14. **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.
15. **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.
16. **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.

The National Tourism Strategy (2025-2030) draws from the above lessons as it seeks to provide strategies and actions to ensure Kenya's tourism becomes, globally competitive, sustainable and resilient.

3.5 VISION, MISSION AND GUIDING PRINCIPLES OF THE NATIONAL TOURISM STRATEGY (2025-2030)

3.5.1 The Vision for Kenya's National Tourism Strategy (2025-2030)

The Vision for Kenya's National Tourism Strategy is underpinned by the urgent need presented by the changing domestic, regional and global environment. The Vision indicates the country's aspiration for its developmental priorities and tourism's role in realizing these. Specifically, the Vision indicates the country's aspiration to become a globally competitive tourism destination anchored on a reputation of being a top safari choice destination in the African region, a destination that supports authentic magical experience dispensed on global best practices and sustainable principles, attracting visitors and investments while guaranteeing that such development remains inter- and intra-generational inclusive and does not compromise preservation of her cultural and natural heritage.

The Vision of this NTS (2025-2030) is therefore that Kenya becomes a

“A competitive and sustainable tourism destination”

3.5.2 The NTS (2025-2030) Mission

“To foster the tourism sector's contribution to Kenya's economy through effective development, management, and marketing in collaboration with stakeholders”

3.5.3 The Guiding Principles the NTS (2025-2030)

Development of Kenya's tourism under this National Tourism Strategy shall be guided by the following principles:

- i. **A sector-wide commitment to Service excellence:** The entire tourism value chain, including the non-tourism service providers shall continually strive for service excellence towards all tourists.
- ii. **Economic inclusion:** Kenya's tourism shall be developed in a manner that creates economic opportunities for all including local communities (especially marginalized groups), local SMEs, the youth and, women.
- iii. **A complimentary approach to destination competitiveness:** Kenya's tourism competitiveness shall be anchored on enhancing the unique tourism resources of each individual region and building synergies between regions and between the national and regional levels.

- iv. **Enhancing tourism multiplier effect:** Kenya's tourism shall be developed with a view to reducing economic leakages while enhancing tourism economic linkages and multiplier effect.
- v. **Stakeholders Collaboration and cooperation:** The multiple stakeholders in Kenya's tourism shall cooperate and collaborate in the development of the country's tourism based on mutual trust and commitment to a shared vision
- vi. **Sector-wide commitment to responsible tourism:** All tourism development and activities shall seek to deliver on the triple bottom-line, namely economic, social and environmental sustainability

3.6 STRATEGIC PILLARS

To realize the vision and targets of the National Tourism Strategy 2025-2030 targets, it will be necessary to focus on key priority intervention areas essential to guarantee competitiveness and which would serve as key frameworks for sustainable and long-term tourism growth. In this regard, the NTS 2025-2030 is hinged on THREE core Strategic Directions:

1. Enhance global competitiveness of Kenya's tourism industry
2. Ensure that Kenya's tourism is sustainable, resilient and inclusive
3. Establish an enabling policy, regulatory and institutional framework

Eleven (11) Strategic Pillars areas are identified for implementation to deliver the vision, outcomes and impacts sought by the National Tourism Strategy 2025-2025. Figure 1.1 below presents the NTS Strategy Map:

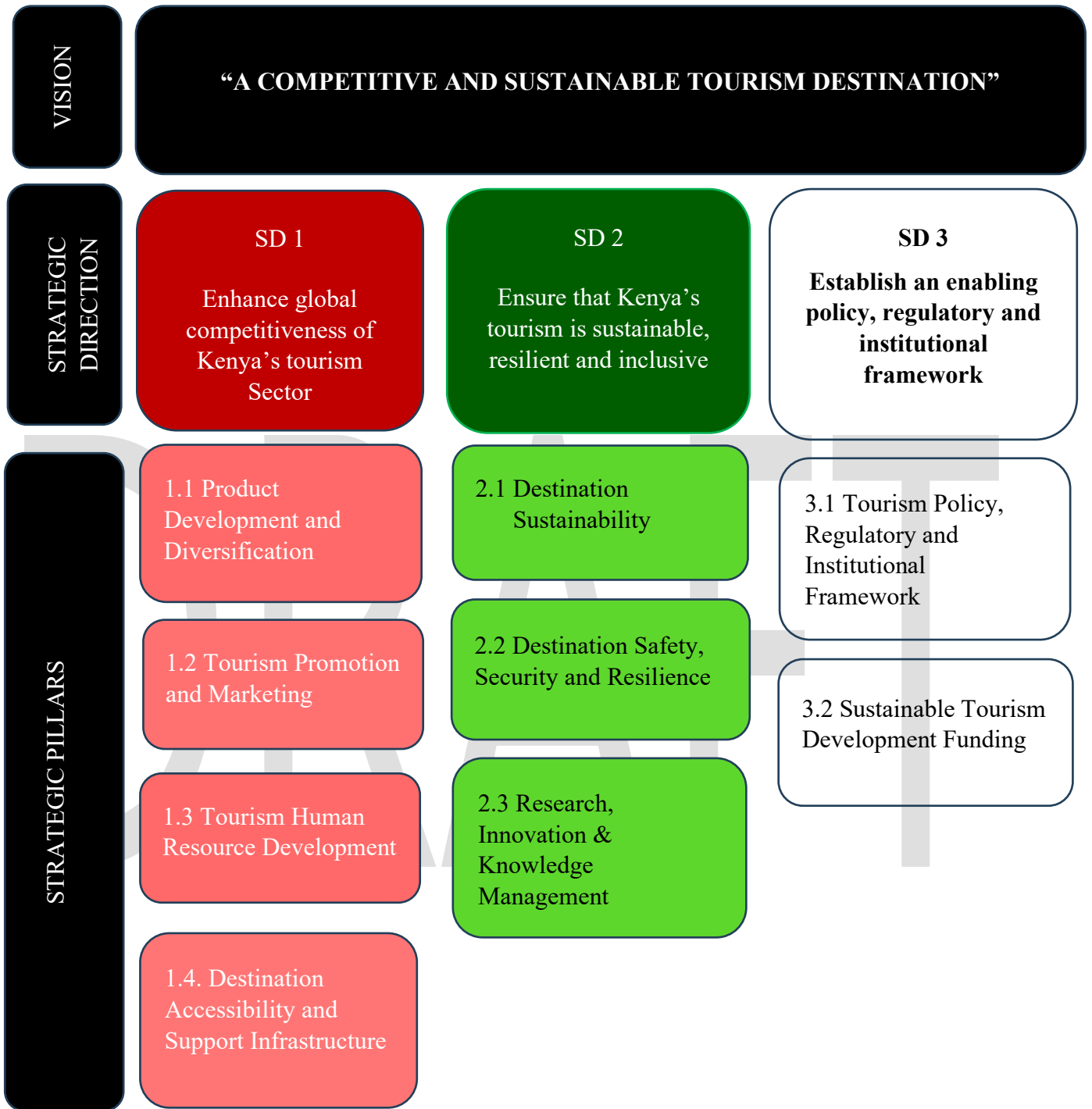


Figure 3.1: NTS 2025-2030 Strategic Framework

Strategic Direction 1

**ENHANCE GLOBAL COMPETITIVENESS OF KENYA'S
TOURISM SECTOR**

Strategic Pillar 1.1: PRODUCT DEVELOPMENT AND DIVERSIFICATION

Introduction

Kenya's tourism has long capitalized on its unique position as the gateway to East Africa, leveraging its biodiversity, strategic location, and globally recognized conservation legacy to attract international visitors. However, to maintain competitiveness and achieve sustainable growth, Kenya must address several strategic challenges and reposition its tourism offering in line with evolving global trends and traveler preferences. Such include,

1. Over-reliance on traditional products- Kenya's tourism sector is still heavily reliant on beach and wildlife safaris, making it vulnerable to market fluctuations, seasonal demand, and changing travel behavior. There is a need to diversify the product.
2. Limited product differentiation and innovation- Kenya's tourism product has over time been cited as having limited packaging of multi-attraction experiences, underutilization of digital platforms, and minimal investment in creative tourism innovations that appeal to modern travelers seeking immersive and personalized experiences.
3. Inequitable regional tourism development- Tourism remains concentrated in a few destinations—such as the coast, Nairobi, and select national parks—while vast regions with potential remain underdeveloped. This contributes to uneven economic benefits, underutilized assets, and limits national tourism resilience.
4. Product quality and standards inconsistency: whereas the country has long instituted classification framework of hotel facilities, there is an absence of clear national classification frameworks for attractions and MICE facilities. This results in inconsistent visitor experiences and a mismatch between product pricing and service delivery, especially in key segments like MICE, wildlife and beach tourism.
5. Weak linkages with local economies: Despite tourism's potential to drive inclusive growth, linkages with local suppliers, artisans, producers, and SMEs remain underdeveloped especially when considering wildlife product. This essentially reduces the sector's developmental impact.
6. Inadequate tourism infrastructure and accessibility: While strides have been made in improving roads and airports, many high-potential tourism areas still face poor accessibility. Inadequate signage, amenities, ICT infrastructure, and tourism-supportive urban planning hinder experience quality and investor confidence.

In view of these limitations, a strategic focus on product diversification, innovation, quality enhancement, and regional spread is key to unlocking new value, enhancing global competitiveness, and achieving inclusive growth across the tourism value chain.

In this Strategic Pillar, key products are identified that have potential to diversify Kenya's tourism product, enhance visitor experience and increase visitor arrivals and ultimately, receipts.

Strategic Objective

To enhance Kenya's global competitiveness as a premier tourism destination

Strategies

Three broad strategies will be focused on

1. Re-engineer Kenya's tourism product development
2. Increase the Country's tourism product range
3. Enhance tourism investment promotion
4. Establish an efficient institutional framework for product development

The specific activities under each Strategic area are elaborated below

STRATEGY 1.1.1: RE-ENGINEER KENYA'S TOURISM PRODUCT DEVELOPMENT

Introduction

Kenya has long been celebrated as a premier tourist destination, renowned for its rich wildlife, stunning landscapes, and vibrant cultural heritage. However, the country's tourism sector remains heavily reliant on traditional safari and beach offerings, making it vulnerable to market fluctuations and global crises. To remain competitive and resilient in a dynamic global tourism market, there is an urgent need to re-engineer Kenya's tourism product development. By rethinking and revitalizing its tourism product, Kenya seeks to unlock new markets, increase visitor satisfaction, and promote sustainable economic growth.

Strategic Activities

1. Enhance Kenya's beach experience

- Enhance accessibility and connectivity to the coastal region.

Key infrastructure actions will include:

- Upgrade Malindi Airport to international status
- Open Moi international airport to more direct international carriers:
- Strengthen regional airstrips (e.g., Ukunda and Lamu) for regional jet capacity and scheduled service.
- Improve road networks and signage to beach areas from inland circuits.

- Establish beach classification framework

This will entail establishing clear categories to define and market Kenya's beaches for different visitor segments modeled after the National Park Categorization Framework adopted by the Kenya Wildlife Services. Clear standards for the destination and facilities, branding and marketing strategy, investment promotion, and a focused beach management programme will be implemented for each beach category. As pertains to the beach classification model, Kenya will adopt a **hybrid model** based on

- a. International benchmarks, particularly, the *Blue Flag system* and
- b. Local criteria aligned with Kenya's tourism goals (luxury, family, ecotourism, adventure)

Proposed beach categories with suggested locations are provided below

Category	Description	Proposed beaches	Rationale
Category A: Premium / Exclusive Beaches	High-end beaches with potential for private concessions, boutique resorts, and luxury tourism targeting high-net-worth individuals. Strict zoning and beach management rules will be observed for privacy, security, and exclusivity	Vipingo Beach & Kilifi	Home to a private golf resort; suitable for exclusive development.
		Tiwi Beach & Kwale	Secluded, pristine beach ideal for luxury eco-resorts.
		Kuruwitu Beach Kilifi	The area is relatively undeveloped and has long sandy beaches, coral reefs, lagoons, ancient indigenous forests, caves, mangrove swamps and ruins over 400 years old. Perfect for upscale sustainable tourism and private luxury villas
		Msambweni Beach Kwale	Quiet, uncrowded, known for luxury private villas.
Category B: Family and Leisure Beaches	Public access beaches with amenities suitable for families, group tourism, and general recreation such as organized vendors, lifeguards, and family-friendly amenities.	Diani Beach, Kwale	Popular with families; developed with resorts, activities, and infrastructure.
		Nyali Beach, Mombasa	Urban beach, easy access from Mombasa city; suitable for managed public use.
		Bamburi Beach, Mombasa	Well-developed with hotels, camel rides, family activities.
		Watamu Beach, Kilifi	Offers a mix of family-friendly activities and nature (marine park).
Category C: Ecotourism and Cultural Beaches	Beaches with significant ecological or cultural heritage, ideal for community-based and educational tourism.	Shimoni Beach, Kwale	Near historical slave caves and marine park; rich in Swahili culture.
		Lamu Beaches (Shela, Kipungani), Lamu	Deep Swahili culture, UNESCO heritage town nearby, ideal for cultural tourism.
		Takaungu Beach, Kilifi	Unspoiled, quiet, and culturally rich; suited for low-impact ecotourism.
		Kiwayu Beach, Lamu	Remote and pristine; within Kiunga Marine Reserve.
Category D: Adventure and Sports Beaches	Beaches ideal for active tourism, marine sports, events, and youth-oriented activities.	Watamu Beach, Kilifi	Excellent for kite surfing, diving, snorkeling; part of a marine park.
		Malindi Beach, Kilifi	Known for diving, water sports, and vibrant town life.
		Gazi Beach, Kwale	Popular for eco-volunteering, kayaking through mangroves.
		Nyali/Bamburi, Mombasa	Urban location with water sports operators and youth appeal.

- **Introduce private beach and island concessions targeting luxury markets.**

This will entail identification and designating specific beaches and islands for private investment under either private ownership, private concessions or long-term island leasing models. The aim is to encourage the development of high-end facilities such as luxury beach clubs and boutique hotels, private marine access points (for yachts, diving, etc.), and helipads or private airstrips

Investment criteria will be set including minimum capital investment, environmental safeguards, employment quotas, and sustainability commitments.

Beaches and islands suitable for private concessions will include

Beach/Island	Potential Use
1. Chale Island (Kwale)	Luxury eco-resorts, private wellness retreat
2. Funzi Island (Kwale)	High-end barefoot luxury lodges, island escapes, marine ecotourism
3. Kiwayu Island (Lamu)	Exclusive-use eco-lodge, sport fishing, diving retreat
4. Manda Toto Island, Lamu)	Perfect for private marine experiences including boutique retreat, yachting base and snorkeling and diving.
5. Takaungu Beach (Kilifi)	Cultural retreats, boutique hotels, heritage experiences
6. Msambweni Beach (Kwale)	Private beach resorts, upscale wellness/spa resorts
7. Vipingo Beach (Kilifi County)	With existing private estate model (Vipingo Ridge) and access to airstrip and gated security, the beach has potential for high-end beach clubs, golf & beach resorts
8. Lamu's Kipungani & Matondoni Beaches (Lamu County)	With its traditional Swahili settings, calm shores, and scenic beauty and away from crowded Shela and Lamu Town, it has potential for boutique heritage resorts, exclusive retreats

- **Diversify the beach experience through complementary offerings.**

Key enhancements will include among others

- i. Golfing: Partner with private developers to establish coastal golf resorts such as Vipingo Ridge (e.g., in Diani, Nyali and Kilifi).
- ii. Marine Sports: Invest in facilities for international-standard events (e.g., kite surfing, deep-sea fishing, sailing).
- iii. Cultural and culinary trails: to include such offers like Swahili food, dhow building, and historical tours to such sites as Gede ruins, Fort Jesus.
- iv. Conferencing:
 - o Establish an international convention center in Mombasa
 - o Promote coastal Kenya as a MICE hub in Africa.

- **Promote signature beach events**

Develop a *National Beach Events Calendar* in collaboration with the private sector and relevant coastal county governments to create a year-round event schedule thus reducing seasonality and boost off-peak tourism. Possible flagship events include among others,

- i. Marine Sports Events such as International Kite Surfing Open (in Watamu), Deep-Sea Fishing Challenge (Malindi), Jet Ski Grand Prix, etc)
- ii. Sand Festivals in Diani or Lamu
- iii. Cultural Beach Festivals such as Swahili Coast Music & Arts Fest (Lamu), Coastal Fashion Fest, Coastal Food Expo, etc
- iv. Eco-Conservation Events such as Beach Clean-Up, Sea Turtle Awareness Day, etc
- v. Beach Golf and Polo events e.g. Beach Golf (in Vipingo), Polo on the Sand (in Shela Beach), etc

- **Promote Kenya’s coast as a global wellness destination targeting retirees and residents of winter-prone areas**

- Develop “**Coastal Wellness Seasons**” with bundled offers combining, Long-stay accommodation, Spa, yoga, marine sports, and Cultural activities and excursions
- Position coastal Kenya as a **winter wellness escape destination** for tourists from winter-prone regions
- Market sun therapy, sea breeze, saltwater treatments, and nature-based relaxation as holistic health experiences.
- Partner with health resorts and clinics to promote therapeutic stays for conditions like arthritis, seasonal depression (SAD), and respiratory wellness.

- **Improve regulation and beach-user safety**

This entail, among others

- Implementing beach zoning (e.g., swimming zones, vendor areas, marine activity corridors)
- Transforming informal beach user groups into structured, accountable governance bodies (under county laws) with clear training and responsibilities
- Enforcing licensing and identification for all beach operators
- Installing safety signage in multiple languages
- Establishing mandatory marine safety protocols for boat rides, diving, jet skis, kite surfing, etc.
- Making beaches safer, especially for women, families, and solo travelers through deploying beach police units or tourism police in hotspots, establishing quick-response units for emergency incidents, and setting up complaint desks and anonymous reporting lines for tourists and locals

- **Formulate beach tourism policy and regulations**

- Establish a high-level task force to oversee the revitalization of Kenya’s beach tourism.

- Review and streamline policies to support luxury tourism investments and private sector partnerships.
- Introduce incentives for high-end investors (tax breaks, land leases for resorts, and eco-friendly development policies).
- Pursue agreements with international hotel brands to establish premium resorts in Lamu, Malindi, and Diani.

2. Position Kenya's wildlife tourism as exclusive and sustainable

Whereas Kenya's wildlife protected areas have been the bedrock of the country's tourism sector, a number of limitations still hold back the competitiveness of this tourism product. Such include, among others,

- Park planning that is often isolated from local and county development strategies
- Most parks operate under a single-use, high-protection model with limited areas for diversified activity.
- Undifferentiated park entry fees and weak community incentives.
- Limited private participation in park operations and infrastructure development.
- Bureaucratic entry processes and fragmented park access.
- Limited support for specialized tourism (e.g., MICE, research, film tourism).
- Parks are ecologically isolated with weak buffer zone protection.

Need therefore exists to address these limitations in order to optimize the full potential of this product that the country is abundantly endowed with. This will be undertaken with a view to position Kenya's wildlife tourism as exclusive and sustainable by elevating park experiences, enhancing local economic linkages, and diversifying wildlife tourism offerings

- **Enhance the existing tiered park classification system**⁵

Kenya's wildlife protected areas will be classified with a goal to align parks with differentiated tourism experiences and ecological sensitivities; guide infrastructure development, pricing, and marketing; optimize resource allocation and visitor management and; encourage private sector and community investments based on park potential

⁵ Benchmark destinations: South Africa- *Flagship parks, Regional Parks and Conservation Priority Parks*; Costa Rica – Biodiversity Hotspot with Smart Zoning

- **Establish “Wildlife resort cities”⁶**

Develop wildlife-adjacent resort cities to provide gateways to key parks, enhance visitor experience and stimulate local economies.

Proposed locations and features

City/Location	Adjacent Parks	Proposed Features
Mutito Andei	Tsavo East & West, Amboseli, Chyulu Hills	High-end hotels, safari malls, artisan markets, airstrip hub, wildlife museum (eg man-heaters of the Tsavo”)
Narok	Masai Mara	Maasai cultural centre, luxury accommodations, wildlife museum, eco-conference centre
Nanyuki	Mount Kenya, Ol Pejeta, Lewa, Aberdare Ranges Buffalo Springs, Shaba, Samburu	Integrated town-resort development, conferences centres, golf, heli-safari base, cross-cultural events

The success of this initiative will be anchored on

- *Park zoning for multi-use development* to introduce such zones as Core Conservation Zones for strict protection, no development, Eco-Tourism Zones with limited eco-lodges and activities and, Commercial Tourism Corridors to support for lodges, conferencing, safari hubs. This will also require enabling adjacent resort cities to access buffer zones for excursions, events, and eco-ventures.
- *Streamlined park access and permitting* including introducing e-permitting systems linked with resort city bookings and transport, multi-park access cards or mobile apps for seamless exploration from resort cities, and prioritizing roads and gates connecting parks to resort cities for investment and maintenance.
- Designing bundled tourism passes linked to resort cities
- Enabling resort cities to invest in gateway infrastructure like information hubs and transport links.

⁶ Examples of Countries with Wildlife Resort Cities: South Africa – Hoedspruit & Hazyview (Near Kruger National Park), Australia – Darwin (Gateway to Kakadu & Litchfield National Parks), India – Sawai Madhopur near Ranthambore National Park, Namibia – Swakopmund (Coastal desert + wildlife experience), Oman – Ras Al Jinz (Sea turtle conservation resort city)

- Integrating all national parks and reserves to County Integrated Development Plans (CIDPs) and Resort City Master Plans.

- **Develop Wildlife “Signature Trails” and Safari Circuits**
- **Adopt and promote a national wildlife tourism brand**
- **Introduce "Wild Kenya Explorer Pass"**

Introduce One smartcard or digital app allowing entry to multiple parks; loyalty benefits and discounts; visa approval; and prepaid game drives, guides, or accommodations. This will be particularly attractive to long-stay tourists and digital nomads.

- **Establish wildlife knowledge centres and museums**
- **Grow wildlife content creation and influencer partnerships**

This will focus on positioning Kenya’s wildlife tourism through high-impact visual storytelling, influencer partnerships, and digital media exposure, thereby reaching new audiences and markets. To achieve this, Kenya will: *Launch wildlife content creators residency program; Create ‘Film Kenya in the Wild’ incentive scheme; Partner with high-reach global influencers; Develop ‘Kenya Wildlife Creators Hub’; Promote Citizen Content and Gamification; Collaborate with streaming platforms and wildlife networks; Establish a content licensing portal; Host an annual “Kenya Wildlife Film and Photography Festival”*

- **Digitally transform the wildlife tourism experience**
 - Develop official **Park Apps** with such features as Crowdsourced real-time animal sightings, park alerts and safety updates, and augmented reality experiences.
 - Introduce **Virtual Safari Subscriptions** for diaspora, schools, and enthusiasts

3. Positioning Kenya as a premier MICE hub in Africa

Broadly, the strategic actions will be anchored on the National MICE Strategy, 2024 – 2028. In line with these strategies, the country will implement an **integrated strategy** built on the following action pillars

- **Strengthen MICE Policy, Governance and Regulations**
 - Enact a **national MICE policy** and re-establish a fully empowered **Kenya National Convention Bureau** to coordinate planning, promotion, and regulation across national and county levels.

- Establish **Regional Visitor and Convention Bureaus (CVBs)** in key MICE destinations including
 - i. Nairobi CVB
 - ii. Mombasa CVB
 - iii. Naivasha/Nakuru CVB
 - iv. Kisumu CVB
 - v. Nanyuki CVB
- Simplify regulation and event logistics including digitizing event permitting, streamlining customs for exhibition goods, and establish safety, health, and sustainability guidelines aligned with global standards.

- **Invest in World-Class MICE Infrastructure**

This will be undertaken with the twin aims of expanding and modernizing MICE facilities across key cities and tourism circuits, secondly, offering unique venues integrating wildlife, coastal, and cultural experiences. Key initiatives will include

- Develop a world-class Convention & Exhibition Centre in Mombasa (targeting coastal and marine-themed conferences).
- Expand existing facilities in Nairobi (especially Kenyatta International Convention Centre – KICC).
- Develop mid-size regional MICE centres in the following regional cities
 - i. Kisumu
 - ii. Eldoret
 - iii. Naivasha
 - iv. Isiolo/Nanyuki
- Enforce mandatory MICE facility certification under a national MICE quality assurance framework. Certified venues will be published on Kenya National Convention Bureau platforms.

- **Brand and promote Kenya as a unique MICE destination**

- Leverage Kenya’s wildlife, beach, culture, and heritage assets by developing MICE packages that promote leisure, incentive travel, and post-event extensions.
- Launch a global “Meet in Kenya” campaign emphasizing the country’s unmatched fusion of business, wildlife, coast, and culture for premium b-leisure experiences.

- **Introduce incentives and bid support**

- Offer financial grants, tax exemptions, and logistical support for international and regional MICE events hosted in Kenya, targeting first-time organizers and high-impact gatherings.
- **Develop Human Capital for MICE sector**
 - Create specialized training and certification programs for event professionals, suppliers, and venue managers to raise service standards and professional capacity.

4. Enhance Kenya’s urban tourism product

Kenya’s urban centers serve as hubs of history, culture, innovation, nightlife, gastronomy, and business. They are home to vibrant art scenes, heritage neighborhoods, museums, music and fashion industries, as well as modern shopping malls, convention facilities, and sporting arenas. These assets provide a strong foundation for developing authentic urban experiences that appeal to both domestic and international travelers, especially millennials, digital nomads, event attendees, and regional weekenders. Strategically developing urban tourism will enable Kenya to position its cities not only as gateways to national attractions but as compelling stand-alone destinations that celebrate the country’s diversity, creativity, and urban vibrancy.

- Build strong and unique urban tourism brand for all major cities in the country.
- Invest in urban attractions and public spaces
- Establish signature urban events and festivals
- Enhance urban transport and mobility for tourists
- Promote smart tourism and digital integration
- Diversify urban experiences and night economy

5: Enhance the quality of hospitality facilities

Kenya’s hospitality sector faces persistent challenges in maintaining and enhancing quality standards. Key issues include the voluntary nature of classification, which results in inconsistent service quality across facilities, and the lack of a legal requirement to seek pre-development classification approval from the Tourism Regulatory Authority (TRA). This leads to missed opportunities in guiding facility design and service models to meet expected quality benchmarks. Additionally, many existing facilities suffer from aging infrastructure and struggle to access

financing for renovations or to adopt sustainable, green technologies. To address these challenges and align with global best practices, the following strategic actions will be implemented

- Require mandatory hotel re-classification every five years
- Establish a hotel facilities improvement revolving fund
- Establish pre-development classification for hotels

Strategy 1.1.2: INCREASE KENYA'S TOURISM PRODUCT RANGE

Introduction

To enhance the competitiveness and sustainability of Kenya's tourism sector, there is a strategic focus on increasing the country's tourism product range. This involves diversifying offerings beyond the traditional wildlife and beach experiences to include underdeveloped niche segments such as cultural tourism, adventure activities, wellness retreats, agro-tourism, and creative industry experiences. By broadening the scope of tourism products, Kenya aims to attract new market segments, encourage longer visitor stays, and reduce over-reliance on a few flagship attractions. This diversification will also help distribute tourism benefits more equitably across regions, foster community participation, and strengthen the sector's resilience to market fluctuations.

Two Strategic Activities will be implemented under this strategy.

1. Develop flagship products in each tourism circuit

Flagship tourism products are the iconic attractions or experiences that define a destination and act as its main drivers of tourism. These will be developed to enable diversification of Kenya's tourism offerings, create strong destination anchors for each tourist circuit, deliver equitable regional development through tourism, and catalyze the development of secondary products thereby increasing the economic impact and tourism value chain across regions.

Noting the high capital resource requirement to develop a flagship product, prioritization will be observed with key consideration being the level of resources required and ability to generate immediate results.

2. Develop events and niche tourism products

Events and niche tourism segments present high-potential avenues to broaden Kenya’s appeal, stimulate underutilized regions, extend tourist stays, and attract new demographics, including millennials, digital nomads, special interest travelers, and the African diaspora. Cultural festivals, sports events, wellness retreats, agro-tourism, second-home tourism, and diaspora-themed experiences offer opportunities to reposition Kenya as a multifaceted destination. By investing in well-structured, high-quality niche and event-based offerings, Kenya will build tourism resilience, drive inclusive local development, and enhance its competitiveness in a global market that favors unique, immersive, and sustainable travel experiences.

- Support development and promotion of signature events.

Key annual events to develop will include

a) Back-to-the-Roots Festival (Annual):

Objective: Reconnect the African diaspora with their ancestral heritage through immersive cultural experiences in Kenya.

Target Audience: Afro-descendants from the Americas, Caribbean, Europe, and beyond.

b) African Music Extravaganza (Pan-African Edition)

Objective: Celebrate Africa’s diverse musical heritage and its global influence featuring performances from leading African, African-descent, and diaspora artists, Music production masterclasses and youth bootcamps, Industry panels with African labels, promoters, and global distributors, and partnering with platforms like Trace TV, Boomplay, and YouTube Music Africa.

c) African Cuisine Festival (Annual)

Objective: Showcase the richness of Africa’s culinary traditions and food heritage.

Key Features:

- Continental food court with regional dishes: East, West, Southern, and North African cuisine.
- Afro-fusion chef battles, cooking classes, and live demonstrations.
- Showcase of indigenous ingredients and traditional preparation techniques.
- Cross-border chef collaborations and food tourism promotions.

Partners: Culinary schools, embassies, food brands, media houses.

d) Africa Fashion Expo – Nairobi Edition

Objective: Make Kenya a fashion and design capital for Afrocentric fashion.

Key Features:

- Runway shows with designers from across Africa and the diaspora.
- Textile and fabric innovation labs (e.g., Kitenge, Ankara, Maasai shuka).
- Fashion entrepreneurship expos, pop-up shops, and buyer-seller matchmaking.
- Integration with art, photography, and digital storytelling.

Collaborators: African Fashion Week, local designers’ associations, fashion tech startups

- Enhance promotion of the existing events to international status

- Establish a National Events Calendar to coordinate, brand, and promote cultural, sports, and entertainment events across counties.
- Provide event incentives and support including Financial, logistical, and marketing support for counties and private organizers
- Develop event infrastructure (stadiums, arenas, open grounds).
- Facilitate safety, permits and security through one-stop platforms for event licensing.

3. Develop and promote sports tourism

- Develop a national sports tourism calendar alongside heritage and cultural events.
- Invest in infrastructure including upgrading stadiums, trails, routes, and emergency response systems in host regions.
- Establish event bidding and hosting protocols
- Promote international partnerships and endorsements working with global sports brands, international federations, and diaspora athletic communities.
- Facilitate visa and travel packages for participants

4. Develop niche tourism products

- Identify potential niche opportunities across the 8 tourist circuits in terms of existing assets, demand trends, and product gaps.
- Develop infrastructure and enabling environment
- Develop and brand signature niche tourism routes and events
- Include niche products in domestic and international marketing campaigns
- Collaborate with influencers and storytellers

Under this area, niche tourism products targeted to be developed will include the following as captured in the table below

Niche Segment	Flagship Kenyan Product
Eco and Nature	Community conservancies
Culture and Heritage	<ul style="list-style-type: none"> • Cultural emersion trails: Swahili Coast, Luo Trail, Turkana, • Nairobi Creative District- a cultural corridors showcasing music, fashion, art and design. • Scenic rail journeys: Package SGR and old rail routes (e.g., Nairobi to Nanyuki, Mombasa-Kisumu)
Adventure and Sports	Iten running camps, Hiking, paragliding, cave exploration, mountain biking (in Elgeyo Marakwet, Taita Hills, Mt. Elgon). River rafting in Sagana
Wellness	<ul style="list-style-type: none"> • Beachfront yoga escapes (in Watamu, Diani, Tiwi) • Mountain or forest meditation and lodges (in Mt. Kenya, Kakamega Forest, Mt Elgon, Karura forest) • Forest spas and eco-luxury retreats (in Mt. Kenya, Kakamega Forest, Mt Elgon, Karura forest) • Urban wellness weekends (in Nairobi, and other major cities)

Spiritual	<ul style="list-style-type: none"> • Pilgrimage trails (martyrs, saints, heritage churches, the African Inland Mission/ PCEA route, early Christian missions in Western Kenya, etc. • Religious gatherings as cross-border attractions including revival weekends, faith healing festivals, global religious events celebrations
Diaspora/Roots	Homestay ancestry trips, naming rituals, etc
Youth and Pop Culture	Nairobi art/music tours, Sheng guides
Agro-tourism experiences	<ul style="list-style-type: none"> • Agro-tourism trails in places such as Central, Rift Valley, and Western regions. • Farm stays, tea/coffee tours, and food festivals featuring indigenous cuisines.

Strategy 1.1.3: ENHANCE TOURISM INVESTMENT PROMOTION

Introduction

Despite Kenya’s diverse tourism potential, the sector remains underinvested in critical areas such as infrastructure, product diversification, quality accommodation, digital transformation, and destination development. There is also limited domestic and regional investment compared to international inflows. With changing global travel preferences, increased competition, and rising demand for sustainable, niche, and experience-based tourism, Kenya must act decisively to:

- Improve the investment climate through streamlined regulatory processes, public-private partnerships (PPPs), and targeted fiscal incentives
- Create inclusive economic opportunities for citizens
- Establish tourism investment zones and resort cities with ready infrastructure and incentives
 - Empower citizen investors through access to finance, training, and entrepreneurship support
 - Promote the country globally as an investment-ready destination through focused campaigns, expos, and diplomatic channels
 - Strengthening inter-agency coordination between tourism, finance, lands, and infrastructure institutions to align priorities and fast-track implementation

By creating a more predictable, inclusive, and investor-friendly environment, Kenya can attract both domestic and international capital into tourism, drive regional development, and enhance the sector’s contribution to the national economy.

Key Strategic Activities

1. Streamline tourism investment policy and regulatory frameworks

- Elevate tourism investment to a **national development priority**, with coordination across ministries and counties, and create high-level accountability for investment facilitation.
- Finalize and implement a *Tourism Investment Framework* aligned with Vision 2030 clearly identifying priority areas like niche tourism, convention infrastructure, eco-lodges, etc.
- Offer targeted incentives to tourism investors in priority areas
- Fast-track approvals through a dedicated *Tourism Investment Facilitation Unit* within KenInvest.

2. Establish tourism investment zones and special economic areas

Special tourism investment zones shall be identified and established. To spur investment, specific measures shall be put in place including tailored incentives, dedicated infrastructure development, simplified tax rules, and fiscal incentives to investors.

Focus will be on *Tourism investment priority areas* featuring strategic flagship products.

3. Enhance access to credit for tourism enterprises

- Partner with financial institutions to create tailored loan products for MSMEs in tourism, supported by partial public credit guarantees and technical assistance.
- Prioritize access to credit for community-based tourism initiatives, women- and youth-led enterprises, and underserved destinations.

4. Promote tourism investment opportunities in the country

- Develop a Tourism Investment Promotion Toolkit, featuring bankable projects
- Facilitate investor matchmaking events and targeted promotion campaigns to attract domestic and foreign direct investment through diplomatic channels, expos, and diaspora networks.

5. Enhance Public-Private Partnerships (PPPs) and government-led infrastructure

- Prioritize public investment in tourism-enabling infrastructure in underdeveloped areas and
- Leverage PPPs to develop resort cities and special tourism economic zones.

6. Boost citizen-led investments in Kenya's Tourism Sector

- Create accessible investment opportunities for citizens including developing small and medium-scale tourism investment packages that require lower capital and technical know-how;
- Encouraging community-owned tourism enterprises through cooperatives or trusts, enabling citizens to invest collectively.
- Promote tourism micro-financing and crowdfunding platforms tailored for local investors.
- Improve access to finance for citizen investors including
 - Utilizing government-backed credit guarantee schemes to reduce lending risks for banks and
 - Promoting partnerships with impact investors and diaspora funds targeting citizen tourism projects.
 - Setting up government-supported or public-private partnership funds aimed at pooling citizen capital for strategic tourism projects.
 - Encouraging county governments to create local tourism investment funds focusing on regional tourism priorities.
- Leverage diaspora engagement
 - Develop targeted products for Kenyan diaspora members to invest in homeland tourism projects
 - Provide diaspora-specific investment facilitation and incentives.

Strategy 1.1.4: ESTABLISH AN EFFICIENT INSTITUTIONAL FRAMEWORK FOR PRODUCT DEVELOPMENT

Introduction

Whereas Kenya's tourism sector holds immense potential for economic growth, the full realization of this potential is often hindered by fragmented institutional coordination, limited resource alignment, and unclear mandates among key stakeholders involved in tourism product development. To address these challenges and foster a structured approach to innovation and investment, there is a need to establish an efficient and inclusive institutional framework.

A robust institutional framework will ensure that tourism product development is strategically guided, well-resourced, and aligned with national and county priorities. It will also create clarity in roles and responsibilities, enhance collaboration between the public and private sectors, and streamline decision-making and implementation processes. This strategy proposes a set of key activities to support the establishment and operationalization of such a framework.

Key Strategic Activities

1. Define institutional roles and mandates

This will entail clearly outlining the roles of national government agencies (e.g., Ministry of Tourism, Kenya Tourism Board, Tourism Regulatory Authority), county governments, and private sector actors in product development. Clear mechanisms for coordination and joint planning across these entities will be established

2. Establish a National Tourism Product Development Committee

A high-level inter-agency committee to oversee, guide, and monitor tourism product development efforts will be established. This will include representatives from key sectors such as transport, culture, environment, investment, and ICT.

3. Develop a national tourism product development policy and framework

This will involve creation of a comprehensive policy that sets out principles, guidelines, and strategic priorities for tourism product innovation and diversification. The framework will be aligned with broader national development plans, county development plans, and global tourism trends.

4. Enhance county-level institutional capacity

This will entail building the capacity of county tourism departments to identify, develop, and manage tourism products. Included here will be such initiatives as provision of tools, training, and technical assistance for product planning and community engagement.

5. Strengthen Public–Private Partnerships (PPPs)

This will entail facilitating structured engagement with private sector players, tourism associations, and investors in the planning and development of products. An incentives and frameworks will be created for joint investments, innovation hubs, and pilot projects.

6. Create a centralized Product Development Fund

Establish a dedicated fund to support tourism product innovation, research, and infrastructure development. The following framework will be adopted

Source	Mechanism	Purpose
National Government	Budgetary allocations via MoTW	Core funding for flagship infrastructure and enabling environment
County Governments	County tourism development funds	Site-specific infrastructure, community engagement, permits
Public-Private Partnerships (PPPs)	Joint ventures, concessions, lease agreements	Development and management of tourism products
Tourism Development Levy	Percentage of tourism revenue generated by the Tourism Fund	Sustainable financing for product upgrades and innovation
International Donors/DFIs	Grants and concessional loans	Strategic catalytic projects
Private Sector Investment	Direct equity and operational investment	Private sector investments including hotels, experiences, etc

DRAFT

Strategic Pillar 1.2: TOURISM PROMOTION AND MARKETING

Introduction

Despite its rich diversity of attractions—ranging from wildlife and heritage to cultural, adventure, and conference tourism—the country remains heavily reliant on a few traditional markets and products. Fragmented branding, underutilized digital platforms, inconsistent visitor experiences, and weak destination coordination have hindered the country from fully capitalizing on emerging tourism trends such as experiential travel, eco-tourism, and domestic and regional tourism. Furthermore, the absence of a cohesive multi-tiered marketing structure—national, circuit, and city-level—has limited Kenya’s ability to compete with well-coordinated global destinations. This strategy seeks to reposition Kenya as a year-round, multi-product destination by addressing these strategic issues through coordinated, innovative, and sustainable promotion and marketing.

Strategic Objectives

To position Kenya as a globally competitive, year-round, and diverse tourism destination.

Key Strategies

To achieve the above objective, Four Strategies will be pursued

1. Establish an overarching strategic and institutional framework for Kenya’s tourism promotion and marketing
2. Enhance Kenya’s visibility as a leading global tourism destination
3. Enhance market-specific approach in destination promotion
4. Establish a sustainable financing model for tourism marketing

STRATEGY 1.2.1: ESTABLISH AN OVERARCHING STRATEGIC AND INSTITUTIONAL FRAMEWORK FOR KENYA’S TOURISM PROMOTION AND MARKETING

Strategic Activity

1. Develop a National Tourism Marketing Strategy

Positioning Kenya as a premier, competitive, and sustainable global tourism destination will **require** development and implementation of a comprehensive **National Tourism Marketing Strategy** that aligns with current market trends, Kenya’s unique tourism offerings, and national development goals.

The strategy will include market segmentation, branding and positioning, digital marketing, and public-private partnerships to increase visibility and attract high-value tourists.

It will also focus on product diversification beyond traditional wildlife and beach offerings, promoting niche segments such as cultural, adventure, MICE (Meetings, Incentives, Conferences, and Exhibitions), and eco-tourism.

2. Restructure institutional framework for destination marketing

Kenya’s tourism marketing will be structured in a 3-tier framework including National Destination Marketing Organization, Regional DMOs, and Convention and Visitor Bureaus (CVBs).

These three levels will play distinct but complementary roles in marketing tourism.

A). National DMO (Kenya Tourism Board)

Role: National-level tourism marketing strategy and global promotion

- i. Develop and implement national tourism marketing strategies aligned with government policy.
- ii. Support brand development to establish a unified tourism identity (i.e “magicalkenya”).
- iii. Promote the country as a whole to international markets, positioning it against global competitors.
- iv. Coordinate with international stakeholders like travel trade, media, and foreign tourism boards.

- v. Collect and disseminate national tourism data to inform marketing strategy and investment.
- vi. Attract major international events and strategic partnerships.
- vii. Promote strategic national tourism flagship products and events.
- viii. Coordinate communication on national tourism crises and disaster management initiatives.
- ix. Provide technical support to regional Convention and Visitor Bureaus

B. Regional DMOs (Total 8)

These shall be established as semi-autonomous chapters of the national DMO for each of the eight (8) tourist circuits in the country.

Role: Promote specific tourist circuits and align with national objectives

Among their key functions shall include

- i. Market their specific regions
- ii. Support product development and destination readiness.
- iii. Coordinate tourism promotion activities of the Counties and stakeholders within the circuit
- iv. Serve as a liaison between national DMO and local operators, ensuring regional input in national strategies and implementation of national tourism promotion strategies within the circuit.
- v. Organize regional campaigns and media familiarization tours to attract both domestic and international visitors.
- vi. Collaborate with National DMO on marketing campaigns, particularly for trade fairs, expos, media tours, or international roadshows.
- vii. Coordinate communication on regional tourism crises and disaster management initiatives.

C. Convention and Visitor Bureaus (CVBs)

Convention and Visitor Bureaus (CVBs) shall be established as **public-private organizations** at County, city or even sub-destination-level depending on the level of tourism development and wishes of the local tourism stakeholders.

Role: Their role shall be to promote the specific County, city or sub-destination for MICE and leisure travel.

Among key functions shall include

- i. Attract and support meetings, incentives, conferences, and exhibitions (MICE).
- ii. Promote local attractions, accommodations, and experiences to leisure travelers and business visitors.
- iii. Work closely with local tourism stakeholders to bid for and host events.
- iv. Provide logistical support and destination information to event planners and visitors.
- v. Develop visitor services (guides, maps, welcome programs).
- vi. Enhance visitor satisfaction and repeat visits, contributing to local economic development.

DRAFT

STRATEGY 1.2.2: ENHANCE KENYA'S VISIBILITY AS A LEADING GLOBAL TOURISM DESTINATION

Introduction

Despite this strong tourism offering, Kenya faces growing competition from emerging and established global destinations. Additionally, limited international marketing, negative media perceptions, and inconsistent branding have at times hindered the country's full potential in attracting high-value global tourists. In an increasingly digital and competitive global tourism marketplace, there is an urgent need for a deliberate, sustained strategy to elevate Kenya's international profile and reposition it as a top-of-mind destination.

This strategy seeks to enhance Kenya's visibility as a leading global tourism destination by adopting modern marketing techniques, strengthening brand identity, leveraging digital platforms, and fostering partnerships across the public and private sectors. The goal is not only to increase international tourist arrivals but also to attract longer stays, higher spending, and repeat visits, while building a resilient, diversified, and sustainable tourism economy. Aligned with Kenya Vision 2030, the National Tourism Blueprint (2017–2030), and regional integration efforts such as the East African Community (EAC) tourism agenda, this strategy will reinforce Kenya's status as a premier destination for adventure, culture, eco-tourism, business, and luxury travel.

Key Strategic Activities

1. Enhance Kenya's brand architecture and destination identity

- Elevate "Magical Kenya" into a multi-layered national brand with regional sub-brands aligned with the different product and geographic identities
- Position Kenya as the heart of authentic African experiences
- Create brand guidelines for use by all stakeholders.

2. Deepen packaging of experience and niche tourism development

- Curate high-value niche circuits such as:
 - i. Culinary trails – promote Kenyan coffee, tea, seafood, traditional foods.
 - ii. Wellness and retreat tourism – aligned with nature, yoga, and spirituality.
 - iii. Indigenous and heritage tourism – showcase renowned heritage such as Maasai, Samburu, Swahili coastal history.
 - iv. Film and photographic tourism – incentives and infrastructure for media creators.

- Co-create packages with airlines, student associations, and tour operators abroad.

3. Smart tourism and digital engagement

- Build a Smart Tourism Portal with Virtual tours, Chatbots for trip planning and, Dynamic travel deals and itineraries
- Expand AR/VR storytelling, especially for diaspora and students abroad.
- Develop integrated tourism super app with maps, bookings, attractions, events, and crowd-sourced local itineraries and ratings, and integrated with eCitizen, Kenya Railways, Jambojet, and tour operators.
- Partner with telcos to roll out free Wi-Fi hotspots in key tourism towns Diani, Naivasha, Nanyuki, Kisumu.
- Install interactive digital screens at parks, airports, museums, and border points.
- Enable digital interpretation panels at national parks and heritage sites (QR codes for audio guides, AR overlays).

STRATEGY 1.2.3: ENHANCE TARGETED MARKET-SPECIFIC APPROACH IN DESTINATION PROMOTION

Introduction

In the dynamic and highly competitive global tourism industry, a one-size-fits-all marketing strategy is no longer sufficient. Travelers across different regions and demographics have distinct preferences, travel motivations, spending patterns, and cultural considerations. To remain competitive and responsive to evolving global tourism trends, Kenya must adopt a targeted market-specific approach in destination promotion. This strategy aims to enhance Kenya's destination marketing by tailoring promotional efforts to specific source markets based on data-driven insights, consumer behavior, and segment-specific demands. By understanding and responding to the unique expectations of tourists from each region or demographic group, Kenya can develop more effective branding, messaging, and product packaging that resonate with target audiences. Implementing this approach will help maximize return on marketing investments, improve visitor satisfaction, attract high-spending tourists, and promote sustainable tourism growth.

Key Strategic Activities

1. Develop the domestic tourism market

- Develop a domestic tourism strategy;
- Collaborate with the County Government to establish Inter-County Regional Boards and Councils to harmonize the tourism functions at the national and county level;
- Create awareness on domestic tourism to Kenyan nationals to increase travel to under visited sites;
- Promote investment in budget-priced tourism facilities
- Launch a bold “Kenya 47 Challenge” encouraging youth to travel across all 47 counties.
- Make tourism fun, relatable, and shareable for Kenya’s youth majority through Niche Experiences such as: Sheng-led city walking tours in Nairobi, Urban art, music, and Gengetone safaris, “Tembea kwa Street Food” culinary circuits, and Influencer-led travel challenges & scavenger hunts, among others

2. Enhance specific marketing efforts in the regional tourism market

- Develop a Regional Tourism Marketing Strategy for Africa.
- Create packages targeting African diaspora and regional tourists seeking “homecoming” or cultural connection (eg “Discover Your Ancestry⁷”, Integration with genealogy services plus village homestays; Reconnection ceremonies, language immersion, naming rituals; etc)
- Promote mass-participation cultural, business, and youth-driven events to boost regional visitations
- Develop affordable cross-border weekend and holiday packages
- Create curated packages for African Muslim markets such as Halal hotels, prayer facilities, Islamic heritage tours (Mombasa Old Town, Swahili coast).
- Leverage Nairobi’s business hub status to promote key products as short safari add-ons for business travelers, shopping tourism, and regional expos and conferences.

⁷ For instance, Ghana created the “Year of Return” (2019) commemorating 400 years since the first enslaved Africans arrived in America.

STRATEGY 1.2.4: ESTABLISH A SUSTAINABLE FINANCING MODEL FOR TOURISM PROMOTION

Introduction

Effective and sustained promotion requires consistent, reliable, and adequate funding. In Kenya, tourism marketing efforts have often been constrained by limited and unpredictable public financing, donor dependency, and fragmented resource mobilization. These challenges have hindered Kenya's ability to implement long-term promotional campaigns, participate in key international expos, and maintain a strong global presence. To overcome these limitations, it is critical to establish a sustainable financing model for tourism promotion that ensures continuous support for destination marketing and stakeholder engagement. A sustainable model would diversify funding sources, reduce overreliance on government budgets, and align financing mechanisms with the dynamic needs of the tourism sector.

This strategy proposes innovative and diversified funding approaches — including tourism levies, public-private partnerships (PPPs), destination marketing funds, and strategic investments by industry stakeholders. The goal is to create a resilient and predictable financial base to support Kenya's tourism promotion agenda in both the short and long term.

Key Strategies Activities

1. Enhance public-sector financing of tourism marketing

Establish and ring-fence a portion of tourism sector development funds mobilized by the sector financial institutions (Tourism Fund/Tourism Promotion Fund)

2. Promote public-private co-investment models:

Enable co-financed marketing campaigns and tourism product development through matched funding with industry stakeholders.

3. Mobilize development partners and international donors:

Secure support for targeted initiatives such as sustainable destination branding, digital marketing capacity building, and tourism MSME promotion.

4. Introduce destination-based revenue retention mechanisms

Allow regional/county DMOs to retain a portion of tourism-generated revenue for localized marketing and branding efforts.

5. Develop innovative financing tools

Explore use of green bonds, crowdfunding platforms, and sponsorship models to support eco-tourism and cultural heritage marketing.

6. Strengthen financial sourcing and management capacity of key institutions:

Train DMOs, CVBs and tourism agencies in budgeting, fundraising, grant writing, and financial accountability for marketing initiatives.

Summary of destination marketing financing model

Type	Description	Beneficiary (National DMO, Regional DMOs, CVBs)
1. Public Sector Funding		
i. Government Allocations:	National, regional, or city governments to provide annual budgets to support DMOs/CVBs, justified by tourism's contribution to GDP and employment.	All
ii. Ring fenced percentage from TF and TPF	A dedicated pre-determined percentage of all collections from TF and TPF	National DMO and Regional DMOs
iii. Grants:	One-time or recurring grants from the MoTW, economic development agencies, or international organizations (e.g., UNWTO, World Bank).	All
2. Private sector sponsorships and partnerships		
i. Corporate Sponsorships:	Airlines, banks, mobile operators, or major brands sponsor tourism campaigns, events, or festivals.	All
ii. Destination Partnerships:	Collaborations with airlines, OTAs (Online Travel Agencies), cruise lines, and booking platforms, among others to jointly market a destination.	National DMO and Regional DMOs
iii. Tourism Business Memberships	Tourism private players pay annual fees to the DMO in exchange for benefits like marketing support, participation in promotions, etc.	National DMO and Regional DMOs
iv. Tourism Improvement Districts (TIDs)	Tourism private players agree to charge themselves an extra fee to fund marketing and tourism development in their district	CVBs
v. Destination Development Fund (Public-Private Grant Fund)	A public-private co-financing. May involve KTB offering matched funding for marketing campaigns led by regional DMOs or clusters of tourism businesses.	Regional DMOs
3. Event-based revenue generation		
i. Hosting and organizing events	Organize events to generate revenue through entry fees, vendor fees, and sponsorships.	All
ii. Bidding for major events	Bid for mega events (sports, cultural, conferences, etc) that leave legacy marketing assets and funding.	All
4. Commercial Activities		
i. Selling branded merchandise		All

ii. Licensing destination brands to private sector companies.		All
iii. Running digital marketplaces for booking tours, hotels, and experiences (earning commissions).		All
5. Innovative Financial Instruments		
i. Tourism Bonds	Issuance of bonds where proceeds are dedicated to destination marketing and infrastructure.	National DMO
ii. Impact Investment Funds:	Seeking investors who want both financial returns and positive tourism development outcomes (e.g., community tourism).	All
6. Visitor Voluntary Contributions		
i. Opt-in donation programs	where visitors are invited to contribute to destination marketing or conservation projects	CVB

DRAFT

Strategic Pillar 1.3: TOURISM HUMAN RESOURCE DEVELOPMENT

Introduction

As global tourism trends evolve—driven by technology, sustainability, customer expectations, and workforce mobility—there is a growing demand for a highly skilled, adaptable, and professional workforce. To maintain its competitive edge and realize its long-term vision under Kenya Vision 2030, the country must invest strategically in the development, certification, and international positioning of its tourism and hospitality human capital.

Kenya has a rich foundation in tourism training, with institutions such as Kenya Utalii College playing a historic role in producing quality graduates. However, the need to align training with international standards, promote quality assurance, and build stronger linkages with global markets has become increasingly urgent. Countries such as Switzerland, the Philippines, and Thailand have demonstrated how targeted investment in tourism human resource development can not only support domestic growth but also create a globally recognized brand for talent export and educational excellence.

This strategic framework sets out to position Kenya as both a world-class source and preferred destination for tourism and hospitality professionals. It outlines clear objectives, goals, and action areas aimed at improving training quality, strengthening institutional capacity, harmonizing certification, and marketing Kenya’s professionals on the global stage. In doing so, Kenya will enhance its competitiveness, support economic diversification, and make tourism human resources a new frontier for foreign exchange generation and regional influence.

Strategic Objective

To position Kenya as a globally recognized hub for highly skilled, competitive, and professionally grounded tourism human resource.

Key Strategies

To achieve the above Strategic objective, three broad strategies will be pursued

1. Enhance the quality of Kenya’s tourism human resource
2. Encourage private sector involvement in tourism workforce development
3. Enhance professionalism in the tourism sector

4. Position Kenya as a global source of competent tourism workforce
5. Position Kenya as a global destination for tourism and hospitality education

STRATEGY 1.3.1: ENHANCE THE QUALITY OF KENYA'S TOURISM HUMAN RESOURCE

Introduction

As Kenya's tourism sector continues to evolve amid global competition, changing traveler expectations, and technological advancements, the quality of its human resource has become a critical determinant of success and sustainability. Tourists today demand not only natural beauty and cultural richness, but also world-class service, professionalism, and authentic experiences—factors that are directly shaped by the skills, attitudes, and competence of tourism personnel. Despite its importance, the tourism workforce in Kenya faces a number of challenges including inconsistent training standards, limited professional development opportunities, and weak linkages between training institutions and industry needs. These issues have contributed to service gaps, reduced competitiveness, and constrained sectoral growth. Enhancing the quality of Kenya's tourism human resource requires a strategic and coordinated approach that promotes standardized training, quality training institutions and trainers to ensure the sector's workforce is equipped to meet current and future demands and thus positioning it to compete effectively on the global stage while delivering exceptional value to tourists and stakeholders alike.

Strategic Activities

- i. Develop and enforce a National Minimum Curriculum Requirements for Tourism Training across certificate, diploma, and bachelors' degree levels based on international occupational standards
- ii. Introduce a tiered system for tourism training institutions including Centres of Excellence and the other lower cadres of institutions with a focus on the different niche areas for tourism training (such as hospitality, culinary arts, tourism policy and planning, sustainable tourism, among others)
- iii. Approve and regularly audit institutions offering tourism-related courses to ensure curriculum relevance and quality.
- iv. Enhance the quality and capacity of Kenya Utalii College as a Centre of Excellence for Hospitality Training.
- v. Train and certify instructors on internationally benchmarked pedagogical development programs in hospitality and tourism.

STRATEGY 1.3.2: ENCOURAGE PRIVATE SECTOR INVOLVEMENT IN TOURISM WORKFORCE DEVELOPMENT

Introduction

The alignment between skills supply and labor market demand in Kenya’s tourism sector remains a persistent challenge, contributing to high youth unemployment, skills mismatches, and underemployment—particularly in fast-evolving sectors such as tourism, agriculture, manufacturing, and ICT. The private sector, as a major employer and driver of innovation, holds immense potential to contribute to the development of a responsive, demand-driven workforce.

However, the involvement of private sector actors in workforce development has traditionally been limited by structural, institutional, and policy-related barriers. Strengthening collaboration between the government, training institutions, and industry is therefore essential to ensure that the country’s education and training systems produce graduates with relevant, market-ready skills. This calls for deliberate strategies to incentivize, institutionalize, and scale up private sector participation in shaping workforce development pathways.

This strategy outlines practical and strategic approaches to enhancing private sector involvement in workforce development in Kenya. It emphasizes public-private partnerships, work-based learning, employer incentives, curriculum collaboration, and data-driven planning, among others. By implementing these strategies, Kenya can foster a more agile, skilled, and competitive workforce that meets the dynamic needs of the modern economy.

Strategic Activities

1. Establish a **multi-stakeholder Sector Skills Council** comprising of industry leaders, training institutions, and government to co-formulate and oversee workforce development strategies.
2. Mainstream **involvement of employers** in designing TVET and university programs to ensure alignment with current and future skills demands.
3. Develop **structured internship and apprenticeship programs**, with incentives (e.g., tax relief) for firms offering placements.
4. Promote a **dual training model** combining classroom learning with industry-based training, as seen in countries like Germany or Rwanda.
5. Strengthen and streamline **use of training levies** (e.g., NITA levy) to directly fund industry-driven training initiatives.
6. Promote **inclusion of private sector** representatives on academic boards and advisory committees of universities and TVET institutions.
7. Encourage **businesses to adopt policies supporting continuous learning** (e.g., CPD programs, learning leave policies).

8. Conduct **regular industry-led surveys** to map skills demand and supply mismatches across key sectors.
9. Formulate **incentives to promote private investors** actively engaged in training especially those focusing on Centres of Excellence.

STRATEGY 1.3.3: ENHANCE PROFESSIONALISM IN THE TOURISM SECTOR

Introduction

Professionalism is a cornerstone of a competitive and sustainable tourism sector. In Kenya, the tourism industry plays a vital role in economic development, employment creation, and cultural preservation. However, inconsistent service quality, lack of standardized training, and weak regulatory enforcement continue to undermine the sector's potential and reputation. These challenges are largely attributed to gaps in professional conduct, certification, and the absence of a coordinated framework to uphold standards across the tourism value chain.

Enhancing professionalism within the tourism sector is essential not only for improving service delivery but also for fostering trust, accountability, and global competitiveness. It requires a deliberate focus on harmonizing certification and registration systems, strengthening professional bodies, and promoting a culture of ethics and continuous learning among tourism practitioners.

This section outlines strategic interventions aimed at institutionalizing professionalism in Kenya's tourism industry. By addressing regulatory, educational, and institutional gaps, the sector can attract high-value tourists, improve stakeholder confidence, and contribute more effectively to national development goals.

Strategic Activities

1. **Harmonize certification and accreditation standards** by creating a standardized framework for training, certification, and accreditation of tourism professionals. These will be aligned with those of UNWTO and ISO tourism standards to enhance credibility.

2. **Introduce progressive certification levels** (e.g., bronze, silver, gold) to motivate continuous professional development.
3. Introduce **mandatory registration and licensing** of all tourism professionals and make registration a legal requirement for practice, similar to other regulated professions.
4. Require **periodic license renewal** tied to Continuing Professional Development (CPD) credits to encourage ongoing education and skill upgrading.
5. Establish an **umbrella statutory professional body** for the tourism sector akin to the Law Society of Kenya or the Kenya Medical Practitioners Board to regulate professional conduct, ethics, and discipline.

STRATEGY 1.3.4: POSITION KENYA AS A GLOBAL SOURCE OF COMPETENT TOURISM WORKFORCE

Introduction

Kenya has long been celebrated as a premier tourist destination, known for its rich cultural heritage, diverse wildlife, world-renowned national parks, and warm hospitality. However, beyond attracting tourists, Kenya has the potential to emerge as a leading global source of skilled tourism workforce. With a youthful population, a growing number of hospitality and tourism training institutions, and a reputation for friendly and service-oriented people, Kenya is well-positioned to supply qualified professionals to the global tourism and hospitality industry.

The global tourism sector continues to expand, creating a consistent demand for well-trained personnel in hotels, airlines, cruise lines, tour operations, and related service industries. Countries in the Middle East, Europe, North America, and parts of Asia are increasingly seeking talent to support the growth of their tourism sectors. By investing in the training, certification, and global placement of its tourism workforce, Kenya can not only reduce unemployment but also boost diaspora remittances and enhance its soft power and international brand.

Key Strategic Activities

1. Standardize certification and accreditation

- Designate KUC as the centre for recruitment, processing, certification and monitoring of outbound tourism labour
- Collaborate with global accrediting bodies to ensure Kenyan qualifications are recognized worldwide.

2. Develop strategic international partnerships

- Establish bilateral agreements with countries facing tourism workforce shortages.
- Create internship and exchange programs with global hotel chains, airlines, and tour companies.

3. **Create a national tourism talent database**

- Develop a centralized digital platform to profile and connect Kenyan tourism professionals with global employers including details on skills, certifications, experience, and language competencies.

4. **Promote Kenya’s tourism talent globally**

- Launch a branding campaign showcasing Kenya as a hub for world-class tourism professionals.
- Participate in international tourism, education, and employment expos.

5. **Facilitate global placement and support services**

- Work with recruitment agencies and labor attachés to ensure ethical recruitment and placement of tourism workforce.
- Provide orientation and support for workers going abroad, including legal rights, financial literacy, and reintegration programs.
- Track employment data, remittances, and employer feedback.
- Continuously refine training and placement strategies based on global trends and labor market needs.

STRATEGY 1.3.5: POSITION KENYA AS A GLOBAL DESTINATION FOR TOURISM AND HOSPITALITY EDUCATION

Introduction

Positioning Kenya as a global destination for tourism and hospitality education represents a transformative opportunity to elevate the country’s profile, drive economic growth, and nurture world-class talent. With its unique blend of natural attractions, cultural diversity, and emerging educational capacity, Kenya is exceptionally well-placed to become a premier regional and international training hub. Achieving this vision requires more than marketing—it calls for strategic investments in curriculum innovation, institutional excellence, and international partnerships. By aligning training programs with global standards, fostering exchange initiatives, and showcasing Kenya’s best practices in sustainable and experiential learning, the nation can attract students, faculty, and industry engagement from around the world.

This section outlines the foundational strategies to position Kenya as a leading center of excellence in tourism and hospitality education attraction regional and international students. This will enhance Kenya’s global education reputation and a source of foreign exchange.

Key Strategic Activities

1. Develop Centers of Excellence

- Develop standards for Centres of Excellence for tourism training including but not limited to
 - Curriculum alignment with international accreditation bodies (e.g., UNWTO.TedQual)
 - Equipment and facilities
 - Quality of trainers and key personnel including international faculty to build diversity and expertise.
 - Establishment of MoUs with renowned hospitality and tourism schools worldwide for faculty exchange, joint programs, and research collaboration.
 - Joining global education networks and tourism bodies to enhance visibility and credibility.
 - Hosting international academic and industry conferences to promote knowledge exchange.
 - Regular peer reviews and benchmarking with leading global institutions.
 - Local and international student internships and exposure
- Upgrade selected institutions (e.g., Kenya Utalii College, select TVETs and universities) into internationally recognized Centers of Excellence.
- Equip these centers to offer specialized programs in emerging areas like eco-tourism, digital tourism, and sustainable hospitality.

2. Promote Kenya as an education tourism destination

- Launch targeted international marketing campaigns positioning Kenya as a safe, scenic, and high-quality education hub.
- Partner with embassies and consulates to attract international students from specifically, Africa, Asia, and Europe.

3. Invest in faculty development

- Facilitate short- and long-term teaching exchanges and internships abroad.
- Support faculty to acquire globally recognized certifications (such as CHT – Certified Hospitality Trainer, IATA/UFTAA certification).
- Create fellowships for Kenyan faculty to train at top global tourism and hospitality institutions.

- Require and facilitate regular industry immersion programs in leading hotels, tour companies, and airlines locally and abroad.
- Offer scholarships and incentives for local trainers to study or train abroad.

4. Streamline visa and immigration policies

- Simplify visa application processes for international students and faculty.
- Introduce special student visa categories for hospitality and tourism programs.
- Offer study work opportunities to retain talent and enhance practical learning.

DRAFT

Strategic Pillar 1.4: DESTINATION ACCESSIBILITY

Introduction

Accessibility is a cornerstone of a successful tourism industry. No matter how attractive a destination may be, its value is diminished if travelers face challenges in reaching it conveniently, safely, and affordably. In Kenya, many iconic tourist attractions remain difficult to access due to inadequate transport links, poor infrastructure, and limited connectivity.

The strategic pillar of destination accessibility focuses on improving the physical connections between key source markets and Kenya's diverse tourism sites. It aims to reduce barriers to travel, enhance mobility within the country, and ensure that both domestic and international tourists can explore Kenya's full tourism offering with ease and confidence. This includes enhancing international and domestic air connectivity, upgrading road and rail networks, improving last-mile access to attractions, and simplifying visa and border procedures. Improving destination accessibility supports Kenya's goal of becoming a regional tourism hub by creating a seamless, efficient, and inclusive travel experience that strengthens competitiveness, increases visitor numbers, and promotes equitable regional development.

Strategic Objective

To improve access into the country and its key tourist destinations, enhancing transport infrastructure, increasing connectivity, and promoting seamless and efficient travel experiences for both domestic and international tourists.

Key Strategies

To achieve this objective, three (3) strategies will be pursued

1. Improve Kenya's accessibility as global tourism destination
2. Enhance accessibility of Kenya's tourism hotspots
3. Improve tourism support infrastructure

Strategy 1.4.1: IMPROVE ACCESSIBILITY INTO THE COUNTRY AS A GLOBAL TOURISM DESTINATION

Introduction

As international tourism becomes increasingly competitive and traveler expectations evolve, ease of access is a key factor influencing destination choice. For Kenya to maintain and expand its share of the global tourism market, it must prioritize the removal of barriers that hinder travelers from entering the country. These include limited international flight connections, restrictive visa processes, inadequate information at points of entry, and inconsistent travel facilitation services.

The strategy to improve accessibility into Kenya as a global tourism destination aims to strengthen the country's position as an open, connected, and convenient destination for international travelers. By making it easier, affordable, and more attractive for tourists to choose Kenya as a first-choice destination, the country can increase international arrivals and attract new market segments.

Strategic Activities

1. Expand and deepen regional and international connectivity

- Negotiate bilateral air service agreements with emerging and high-potential source markets (e.g. Asia, Middle East, Eastern Europe).
- Promote Kenya as a regional aviation hub through partnerships with global and regional airlines.
- Support the expansion of Kenya Airways and encourage international airlines to open direct routes to Nairobi, Mombasa, and other strategic entry points.
- Support growth of low-cost carriers to serve regional routes affordably including offering aviation incentives and encouraging LCCs to open Nairobi, Mombasa, Kisumu as regional mini-hubs
- Make overland travel between Kenya and neighboring countries safe, fast, and affordable through promoting regional bus travel
- Establish regional road circuits (eg Arusha – Namanga – Amboseli – Nairobi – Kisumu – Jinja (loop tours),
- Introduce Border Fast-Track Lanes for group travelers and e-clearance systems.

2. Streamline visa and immigration procedures

- Expand the implementation of Kenya's e-visa and visa-on-arrival systems to reduce processing time and enhance convenience.

- Simplify and harmonize entry requirements through regional initiatives like the East Africa Tourist Visa and Protocol for Free Movement of Persons as espoused by both AU and IGAD
- Enhance immigration and customs clearance capacity at key entry points to reduce congestion and improve service quality.

3. Upgrade international airport infrastructure and services

- Modernize facilities at Jomo Kenyatta International Airport (JKIA), Moi International Airport (Mombasa), and Kisumu International Airport to meet international standards.
- Enhance customer service training for immigration, customs, and airport staff to provide a welcoming experience.

4. Pursue a tourism and aviation policy trade-off approach

Aviation serves as the primary gateway for international tourists, with over 70% of arrivals entering the Kenya by air. Despite this symbiotic relationship, tourism and aviation policies have often been developed and implemented in silos, leading to missed opportunities for synergy, policy misalignment, and underutilization of market potential. The country will adopt a tourism-aviation policy trade-off approach — a coordinated framework where the policy needs of one sector are balanced with the objectives and constraints of the other. To achieve this, the country

- Establish an inter-ministerial platform (e.g. Ministry of Tourism, Ministry of Transport, Kenya Civil Aviation Authority, Kenya Airports Authority) for joint policy formulation and review.
- Incentivizing route development through offering fiscal or regulatory incentives (e.g. reduced landing fees, marketing support) for airlines opening direct routes to high-potential tourism source markets.
- Review and rationalize aviation-related taxes, airport charges, and levies that may increase the cost of air travel to Kenya, potentially deterring tourists.
- Position Kenya Airways as a strategic tourism enabler, as opposed to just being a commercial airline,
- Foster data exchange between tourism and aviation stakeholders to support demand forecasting, route planning, and visitor profiling.
- Use joint research to identify untapped or underserved international markets and design targeted air access strategies.

STRATEGY 1.4.2: ENHANCE ACCESSIBILITY OF KENYA'S TOURISM HOTSPOTS

Introduction

The full potential of many of Kenya's tourism hotspots remain untapped due to limited accessibility, especially in remote or emerging tourism regions. Poor road conditions, inadequate air connectivity, and insufficient transport infrastructure often deter both domestic and international travelers from exploring beyond the traditional tourist circuits. Enhancing the accessibility of Kenya's tourism hotspots is therefore a strategic imperative to drive inclusive tourism growth, disperse visitor flows, and stimulate local economies across all counties. The strategy involves targeted investments in road and rail improvements, expansion of domestic air connectivity, development of last-mile transport links, and integration of multimodal transport solutions.

Key Strategic Activities

1. Upgrade key road corridors leading to tourist destinations

- Rehabilitate and expand roads leading to high-traffic attractions such as Maasai Mara, Amboseli, Samburu, Lake Nakuru, and Mount Kenya.

2. Enhance signage on tourism routes

- Install clear, multilingual directional and interpretive signage along major tourism corridors.

3. Expand and modernize rail services to tourist areas

- Extend the Standard Gauge Railway (SGR) connectivity to additional tourism hubs beyond Mombasa, including Naivasha, Kisumu, and Nanyuki.
- Improve the quality, frequency, and comfort of train services targeting tourists, including the introduction of scenic or luxury train packages.

4. Strengthen feeder and last-mile connectivity

- Develop and maintain feeder roads linking major highways and rail lines to lodges, parks, and cultural sites.
- Partner with counties to implement rural access road projects aligned with tourism routes.

5. Incorporate green and inclusive transport solutions

- Promote the use of electric vehicles and non-motorized transport (bicycles, walking trails) in parks and urban tourism zones.

Strategy 1.4.3: IMPROVE SUPPORT INFRASTRUCTURE

Introduction

To fully realize the potential of the tourism sector, there is a pressing need to improve tourism support infrastructure across the country. Many of Kenya's prime tourist attractions, including national parks, coastal resorts, and heritage sites, are located in remote or underserved areas where infrastructure is either inadequate or poorly maintained. Issues such as poor road conditions, insufficient waste management systems, and unreliable water and electricity supply continue to hinder tourism growth and visitor satisfaction. Notably, improving tourism support infrastructure is a priority under Kenya Vision 2030 and the National Tourism Blueprint (2017–2030). Strategic investments in infrastructure will enhance accessibility, safety, and comfort for tourists while simultaneously boosting local development and environmental sustainability.

Strategic Activities

1. Enhance utility services in tourist zones

- Improve water supply systems and sanitation facilities in high-traffic tourist zones
- Ensure stable electricity supply through grid expansion and renewable energy solutions in remote lodges and camps.
- Strengthen solid waste management and recycling initiatives in tourism hotspots to preserve environmental integrity.

2. Strengthen digital and communication infrastructure

- Expand high-speed internet and mobile network coverage in national parks, game reserves, and coastal areas.
- Develop digital platforms for tourism marketing
- Promote digital payments and e-booking systems for tourism services.

3. Develop and improve tourism amenities

- Construct and rehabilitate public amenities such as toilets, rest areas, signage, and information centers in tourist circuits.
- Enhance security infrastructure, including tourist police units, CCTV surveillance, and emergency response systems.

Strategic Direction 2

**ENSURE THAT KENYA'S TOURISM IS SUSTAINABLE,
RESILIENT AND INCLUSIVE**

Strategic Pillar 2.1:: DESTINATION SUSTAINABILITY

Introduction

As tourism continues to contribute significantly to the country's economy, the concept of destination sustainability has become increasingly vital. Sustainable tourism in Kenya seeks to balance the needs of visitors, the environment, local communities, and future generations.

Destination sustainability refers to the long-term viability of a tourism destination by ensuring economic, social, cultural, and environmental impacts are managed responsibly. In Kenya, this approach is particularly important due to the country's heavy reliance on natural assets including wildlife, landscapes and coastal ecosystems, which are vulnerable to overuse and climate change.

Strategic Objective

To ensure that Kenya's tourism growth is economically viable, environmentally responsible, culturally respectful, and socially inclusive

Strategies

1. Strengthen sustainable tourism regulatory and governance framework
2. Mainstream sustainability principles in Kenya's tourism sector
3. Enhance monitoring of tourism suitability in Kenya
4. Establish a financing framework for sustainable tourism development

STRATEGY 2.1.1: STRENGTHEN SUSTAINABLE TOURISM REGULATORY AND GOVERNANCE FRAMEWORK

Introduction

Kenya's rich natural heritage is the foundation of its tourism industry. However, growing visitor numbers, climate change, infrastructural pressures, and unsustainable practices pose significant risks to the long-term viability of these destinations. To secure Kenya's global reputation and ensure the continued benefits of tourism for future generations, it is critical to integrate sustainability into destination planning, development, and management.

The following strategic activities outline practical steps Kenya will take in implementing this strategy.

Strategic Activities

1. Review and update existing tourism legislation and policies

- Conduct a comprehensive audit of current tourism laws, policies, and regulations to identify gaps in sustainability provisions and enforcement.
- Align national tourism laws with global sustainability frameworks (e.g., UNWTO, GSTC, SDGs).

2. Integrate sustainability requirements into licensing and compliance

- Revise tourism business licensing frameworks to include minimum sustainability criteria
- Introduce a tiered licensing system that rewards high-performing enterprises with incentives such as tax breaks or marketing support.
- Establish a compliance monitoring system with regular sustainability audits.

3. Develop county-level sustainable tourism regulations

- Support counties in drafting localized tourism regulations aligned with national sustainability goals.
- Provide technical assistance and model frameworks for county governments.

4. Strengthen the role of Tourism Regulatory Authority (TRA) in sustainability oversight

- Expand the mandate of TRA to include enforcement of sustainability standards and reporting.
- Build TRA capacity in environmental compliance monitoring and destination sustainability evaluation.

5. Formulate efficient governance framework for sustainable tourism in Kenya

The following governance structure will be applied in ensuring sustainable of Kenya's tourism

Agency	Role
1. Ministry of Tourism and Wildlife (Lead Agency)	Strategic leadership and policy oversight with the following specific roles <ul style="list-style-type: none"> • Lead in policy development and legislative reforms for sustainable tourism. • Provide national-level coordination and alignment with broader national, regional and international frameworks • Mobilize resources and integrate sustainability into national tourism development plans. • Convene inter-agency committees and national stakeholder forums on sustainable tourism governance.
2. Tourism Regulatory Authority (TRA)	Regulation, compliance, and quality assurance <ul style="list-style-type: none"> • Enforce licensing standards that incorporate sustainability requirements. • Conduct compliance monitoring and sustainability audits for tourism enterprises. • Maintain a national tourism database that includes sustainability performance indicators. • Provide technical support and training to county licensing authorities.
3. Eco-Tourism Kenya	Lead in voluntary certification and private sector engagement <ul style="list-style-type: none"> • Administer and promote the Eco-Rating Certification Scheme for tourism operators. • Provide training and awareness on sustainable tourism best practices. • Advocate for responsible tourism through industry engagement and knowledge sharing. • Partner with TRA and KTF to support capacity building and benchmarking.
4. Global Tourism Resilience and Crisis Management Centre – Eastern Africa	Risk Management and Resilience Building <ul style="list-style-type: none"> • Offer technical expertise on building resilience to shocks • Conduct research, policy analysis, and risk assessments for tourism resilience. • Build capacity of public and private stakeholders to prepare for and recover from crises. • Serve as a knowledge hub and think tank on resilience-linked sustainability.
5. Kenya Tourism Federation (KTF)	Private sector representation and advocacy <ul style="list-style-type: none"> • Represent tourism sector associations in national policy dialogue. • Coordinate self-regulation efforts and promote industry compliance with sustainability standards. • Provide feedback on regulatory proposals and enforcement challenges. • Facilitate public-private partnerships for sustainable tourism development.
6. County Governments	Local implementation and regulation <ul style="list-style-type: none"> • Develop and enforce county-specific tourism bylaws and sustainability regulations. • Participate in planning and managing local tourism development projects in alignment with sustainability principles. • Support community-based tourism and manage local tourism infrastructure. • Collaborate with TRA, NEMA, and national agencies for joint inspections and compliance enforcement.
7. National Museums of Kenya (NMK)	Cultural and natural heritage preservation <ul style="list-style-type: none"> • Safeguard and manage Kenya's cultural, historical, and natural heritage sites • Advise on the sustainable use and promotion of heritage assets for tourism • Collaborate with county governments and tourism stakeholders to develop and promote heritage trails and interpretive programs that educate visitors and benefit local communities.

	<ul style="list-style-type: none"> Support research, documentation, and monitoring of heritage sites to inform sustainable tourism planning and development.
8. Bomas of Kenya	<p>Cultural Promotion and Community Representation</p> <ul style="list-style-type: none"> Preserve, promote, and showcase Kenya’s diverse cultural heritage through traditional music, dance, crafts, and homestead replicas. Offer a platform for responsible cultural tourism that is authentic, respectful, and benefits local communities and artisans. Develop partnerships with counties and cultural groups to expand cultural tourism circuits Educate tourists and locals on Kenya’s cultural diversity Support training and innovation in performing arts and cultural interpretation, contributing to the sustainability of cultural expressions.
9. Tourism Research Institute and Academia	<p>Research and Innovation</p> <ul style="list-style-type: none"> Conduct applied research on sustainable tourism practices, impacts, and innovations. Develop training curricula for sustainable tourism and build capacity for implementation. Provide policy recommendations based on data and evidence.
10. Kenya Wildlife Service	Conservation and protected area management
11. Kenya Forest Service	Forest-based tourism and biodiversity protection
12. National Environment Management Authority	Environmental regulation and oversight
13. Development Partners and NGOs	Technical and financial support
<p>Coordination Mechanism</p> <ol style="list-style-type: none"> National Sustainable Tourism Governance Council (NSTGC): A multi-sectoral body chaired by the Ministry of Tourism and Wildlife, comprising all the stakeholders listed above. Mandate: Policy coordination, conflict resolution, joint planning, monitoring, and reporting. Thematic Working Groups: Sub-committees under the NSTGC focusing on specific thematic areas 	

STRATEGY 2.1.2: MAINSTREAM SUSTAINABILITY PRINCIPLES IN KENYA’S TOURISM SECTOR

Key Activities

1. Promote environmental stewardship in tourism

This will be undertaken with a goal to minimize the environmental footprint of tourism activities and protect Kenya’s natural capital. The following actions will be taken

- Implement national sustainability standards for hotels, tour operators, and attractions (e.g., energy efficiency, waste management, water conservation).
- Enforce carrying capacity limits for sensitive destinations like the Maasai Mara, Mount Kenya, and coastal marine parks.
- Promote eco-certification programs and green labels
- Support low-impact tourism options such as walking safaris, community-based eco-lodges, and conservation volunteering.

- Develop national guidelines for climate-resilient tourism infrastructure and coastal management.

2. Mainstream inclusive community engagement and benefit-sharing

The aim of this will be to ensure local communities are active participants and primary beneficiaries of tourism development.

- Promote establishment of local tourism enterprises and cooperatives with support in training, financing, and market access.
- Market community conservancies and cultural experiences as core tourism products.
- Mandate benefit-sharing frameworks for tourism operators in protected and community-managed areas.
- Institutionalize Free, Prior, and Informed Consent (FPIC) in all tourism development processes on community land.

3. Enhance cultural heritage preservation and respect

Kenya recognizes the need to safeguard her diverse cultural heritage and integrate it meaningfully into tourism offerings. To achieve this, the following will be undertaken

- Protect and promote indigenous cultures through curated, respectful cultural tourism.
- Register and preserve cultural heritage sites under the National Museums of Kenya and UNESCO frameworks.
- Support local artisans and performers through dedicated marketplaces and cultural festivals

4. Promote responsible visitor behavior and education

- Create cultural protocols and codes of conduct for tourists visiting sacred or sensitive sites.
- Launch a national “Travel Responsibly in Kenya” campaign to educate tourists on sustainable practices.
- Partner with travel platforms and influencers to amplify messaging on conservation and cultural sensitivity.
- Engage schools, colleges, and local media in building sustainability consciousness.

5. Promote sustainable transport and infrastructure

- Promote eco-friendly transport options within and between destinations (e.g., electric safari vehicles, bike tours, low-emission shuttles).
- Incorporate sustainability standards into tourism infrastructure projects (e.g., eco-design of lodges, renewable energy use).
- Improve walkability, signage, and accessibility in urban and heritage tourism sites.
- Encourage green building codes and energy audits for all tourism properties.

STRATEGY 2.1.3: ENHANCE MONITORING OF TOURISM SUITABILITY

Key Activities

1. Establish the Kenya National Tourism Observatory (KNTO)

- Establish KNTO as consortium led by the **Tourism Research Institute** in collaboration with TRA, KTB, and a university. This agency will have as its core functions being to
 - i. Collect, manage, and disseminate data on tourism impacts and sustainability indicators.
 - ii. Coordinate with UN Tourism's International Network of Sustainable Tourism Observatories (INSTO) for global benchmarking and technical guidance.
 - iii. Serve as a central hub for evidence-based tourism planning, crisis response, and stakeholder engagement.

2. Define a national framework for tourism suitability indicators and data collection

- Customize UN INSTO's indicators⁸ to Kenya's context, tourism circuits, and the broad national development framework.
- Develop detailed measurement tools and data collection guidelines.
- Develop a "Sustainability Monitoring Toolkit" tailored to Kenya's diverse destinations (such as beaches, wildlife, and heritage sites).
- Establish **County Observatories** as local arms of the national system.
- Train tourism officers and local tourism actors in data collection and sustainability monitoring.
- Establish MOUs with key data source partners

3. Develop a National Digital Tourism Observatory Platform

- Partner with relevant agencies and bodies (such as the ICT Authority, Smart Africa, digital innovation hubs) to develop a *National Digital Tourism Observatory Platform* under the KNTO with the following features:
 - Real-time dashboards by circuit and destination.
 - GIS-based mapping of tourism pressure points.
 - Integrated feedback system for tourists, enterprises, and communities.
 - Open access data sets and visual analytics for stakeholders.

4. Institutionalize periodic sustainability audits and assessments

⁸ UN INSTO's indicators cover the following core areas: core areas: Local satisfaction with tourism, Tourism seasonality, Employment, Energy and water consumption, Wastewater and solid waste management, GHG emissions, Accessibility, Tourist flow & carrying capacity, Economic benefits to local communities, and Cultural and natural heritage impact.

- KNTO in collaboration with TRA, NEMA, EcoTourism Kenya, and County Tourism Departments will undertake biannual destination audits and publish national and circuit-specific scorecards to guide destination management.

5. Mainstream sustainability monitoring into licensing and planning

- Mandate sustainability reporting as part of tourism licensing, EIA follow-up, and investment approval.
- Link observatory data to TRA compliance systems and KWS/KFS ecological monitoring.

6. Publish National Tourism Sustainability Reports

- KNTO will coordinate with stakeholders to produce a Bi-annual *State of Tourism Sustainability in Kenya Report*. Findings will be shared with stakeholders including National government, County governments, International agencies, private sector.
- Publications and case studies will be published for global sharing through INSTO and regional networks.

STRATEGY 2.1.4: ESTABLISH A FINANCING FRAMEWORK FOR SUSTAINABLE TOURISM DEVELOPMENT

To enable stakeholders, mainstream their green programs, there is need to mobilize and sustain financing for environmentally responsible, socially inclusive, and climate-resilient tourism development in Kenya.

Key Activities

1. Conduct a national tourism sustainability financing assessment

- Map current financing instruments, funding flows, and gaps in sustainable tourism investment.
- Assess financing needs of SMEs, community tourism groups, eco-lodges, and public agencies.
- Identify barriers to accessing finance (collateral, knowledge, creditworthiness, etc.).

2. Establish a National Green Tourism Fund (NGTF)

- Create a dedicated **Green Tourism Fund** as a public-private trust to support sustainable tourism development initiatives (such as eco-certification, green building retrofits,

community-based conservation projects, and climate-resilient infrastructure and transport in tourism hotspots).

- Capitalize the NGTF fund from:
 - Government allocations (Ministry of Tourism & Treasury)
 - Tourism levies (e.g., a sustainability surcharge on park fees or hotel stays)
 - International donors (e.g., GEF, UNDP, World Bank, EU, UNEP)
 - Private sector contributions and CSR funding
 - Carbon offset payments
- Define priorities for financing and outline financing mechanisms including grants, concessional loans, guarantees, blended finance, etc.

3. Mobilize green and climate finance for tourism

- Facilitate access to global climate funds and green bonds for eligible tourism projects.
- Build capacity of tourism enterprises to apply for:
 - Green Climate Fund (GCF)
 - Adaptation Fund
 - Africa Climate Change Fund
 - Global Environment Facility (GEF)

4. Establish incentives for sustainable investment

- Provide tax rebates, green bonds, and low-interest green loans for tourism enterprises that adopt renewable energy, waste management systems, water-saving technology, and carbon-neutral practices.
- Partner with commercial banks and development finance institutions to offer dedicated green tourism credit lines.

5. Create Public-Private Partnership (PPP) Models for tourism sustainability

- Facilitate co-investment in sustainable projects (e.g., renewable-powered lodges, cable cars, smart waste systems).
- Package viable community-tourism enterprises for co-financing by counties, private investors, and NGOs.

Strategic Pillar 2.2: DESTINATION SAFETY, SECURITY AND RESILIENCE

Introduction

Kenya's tourism sector is a major contributor to its GDP, employment, and foreign exchange. However, safety, security, and resilience remain critical to its sustained growth and international competitiveness. In the face of increasing global risks—ranging from terrorism and pandemics to climate change and political instability. In this regard, the country will adopt a proactive, multi-sectoral strategy to protect visitors, communities, and infrastructure while ensuring business continuity and destination appeal.

Strategic Objective

To enhance the safety, security, and resilience of Kenya's tourism destinations

Strategies

1. Develop a national tourism safety and crisis institutional and governance framework
2. Strengthen disaster and crisis management for the tourism sector

STRATEGY 2.2.1: DEVELOP A NATIONAL TOURISM SAFETY AND CRISIS GOVERNANCE FRAMEWORK

Key activities

1. Develop an efficient governance and institutional framework for tourism safety and crisis

Kenya's tourism sector requires a dedicated, multi-level framework to protect its assets, ensure visitor safety, and foster rapid recovery. This framework outlines how different tourism-related institutions coordinate before, during, and after a crisis.

Institution	Responsibilities
National Level Institution	
Ministry of Tourism and Wildlife	<ul style="list-style-type: none"> ● Lead tourism crisis policy formulation and coordination. ● Develop a National Tourism Safety and Security Framework, aligned with national security and disaster preparedness strategies. ● Establish national guidelines for tourism risk reduction, business continuity, and visitor safety. ● Coordinate inter-ministerial actions during major disruptions affecting tourism
National Tourism Crisis Steering Committee	<ul style="list-style-type: none"> ● Formal crisis declaration, high-level coordination, post-crisis review
Global Tourism Resilience Centre	<ul style="list-style-type: none"> ● Technical support for resilience planning, training, research ● Hosts TCMU
Tourism Crisis Management Unit	<ul style="list-style-type: none"> ● Sector risk analysis, SOPs development and maintenance, liaison with NDOC and counties
Tourist Police Unit (TPU)	<ul style="list-style-type: none"> ● Special police unit assigned to tourist zones. ● Provides visible safety presence, responds to tourist complaints and emergencies. ● Works with DCMUs to manage security threats and evacuations if needed.
Kenya Tourism Board	<ul style="list-style-type: none"> ● Lead crisis communication and destination image recovery campaigns. ● Provide real-time updates to international markets, travel trade, and media. ● Support the tourism sector in post-crisis marketing and stakeholder engagement
Tourism Regulatory Authority	<ul style="list-style-type: none"> ● Enforce safety compliance across hotels, tour operators, and other tourism businesses. ● Mandate emergency preparedness plans, first-aid readiness, and crisis drills in licensed facilities. ● Support training programs for resilience planning in the private sector.
Kenya Tourism Federation	<ul style="list-style-type: none"> ● Operate a Tourism Safety and Crisis Centre (TSCC) providing 24/7 updates on incidents and safety advice to tourists and operators. ● Acts as a liaison between the private sector and government during emergencies
Regional Level Institutions	
County Tourism Emergency Committees	<ul style="list-style-type: none"> ● Implementing the national tourism safety and disaster policy at the local level. ● Coordinating with County Disaster Management Committees and health departments to prepare and respond to tourism-related crises. ● Facilitating training for local tourism workers on risk reduction and emergency response. ● Conducting crisis drills, information coordination, and stakeholder preparedness.

STRATEGY 2.2.2: STRENGTHEN DISASTER AND CRISIS MANAGEMENT

Key activities

1. Develop a National Tourism Crisis Management and Resilience Strategy

- Identify priority risks (e.g. pandemics, floods, terrorism, drought, fires, political unrest).
- Establish a national coordination framework between the Ministry of Tourism, Ministry of Interior, National Disaster Operations Centre (NDOC), KTB, and counties.
- Integrate the strategy with Kenya’s national disaster management and climate adaptation plans.

2. Establish Tourism Crisis Management Unit (TCMU)

- Set up TCMU as a dedicated unit within the Global Tourism Resilience and Crisis Management Centre (Eastern Africa Hub) with responsibilities for risk analysis, early warning, coordination, communication, and support to counties and operators.

3. Develop Standard Operating Procedures (SOPs) for key areas including:

- Evacuations and safety of tourists
- Communication with stakeholders
- Medical emergencies
- Incident reporting and tracking

4. Build capacity at national, county, and enterprise levels in:

- Emergency preparedness and first aid
- Risk identification and mitigation
- Post-crisis recovery planning

5. Conduct Regular Risk Assessments of Tourism Circuits and Sites

- Map high-risk destinations based on past incidents and environmental vulnerability and prioritize interventions in ecologically fragile, remote, or politically sensitive areas.
- Obtain and use GIS and climate data to model exposure and plan mitigation.

6. Strengthen early warning and communication systems

- Link tourism stakeholders to **NDOC and Kenya Meteorological Department alerts**.
- Use integrated communication plan to share early warnings including SMS, radio, digital apps, and community networks

7. Promote business continuity and recovery planning for tourism enterprises

- Develop and disseminate a **Tourism Business Continuity Toolkit** for SMEs and operators.
- Encourage insurance uptake and financial preparedness.
- Support development of post-crisis recovery plans, including mental health support for staff.

8. Establish a centralized crisis communication system

- Establish a single, reliable, and coordinated communication system that ensures accurate, timely, and consistent information flow to all tourism stakeholders before, during, and after a crisis. This will be coordinate by the Kenya Tourism Board
- Promote transparency in incident reporting and resolution to build traveler trust.
- Engage media and influencers to counter negative perceptions and highlight success stories.

Strategic Pillar 2.3: RESEARCH, INNOVATION, AND KNOWLEDGE MANAGEMENT

Introduction

To remain competitive and resilient, Kenya’s tourism sector must be driven by evidence-based decision-making, continuous innovation, and effective knowledge sharing across all levels—from government and industry to communities and tourists. This calls for a deliberate strategy to strengthen research, harness innovation, and manage knowledge as strategic assets.

The Research, Innovation, and Knowledge Management (RIKM) Strategy for Kenya’s tourism sector provides a framework to unlock the full potential of tourism as a sustainable development pillar. By investing in robust data systems, fostering partnerships between academia and industry, supporting tourism startups, and mainstreaming local and Indigenous knowledge, this strategy aims to make tourism in Kenya smarter, more inclusive, and future-ready.

Anchored in Vision 2030, the Bottom-Up Economic Transformation Agenda (BETA), and global best practices, the strategy aligns tourism development with Kenya’s broader goals of socio-economic transformation, environmental stewardship, and digital advancement. It envisions a tourism sector where innovation thrives, policies are informed by research, and knowledge empowers communities and institutions alike.

Strategic Objectives

To transform Kenya’s tourism into a sustainable, competitive, and inclusive sector **Key**

Strategies

1. Enhance generation of tourism research and intelligence
2. Enhance innovation in the tourism sector

STRATEGY 2.3.1: ENHANCE GENERATION OF TOURISM RESEARCH AND INTELLIGENCE

Key Activities

1. Establish tourism knowledge management systems

- Standardize tourism data collection and reporting across counties.
- Document and integrate Indigenous Knowledge and heritage practices into tourism narratives.
- Develop a Kenya Tourism Knowledge Portal with research, best practices, and data dashboards.
- Establish a national repository of market intelligence and case studies.

2. Promote applied research for sustainable tourism

- Revise and publish the National Tourism Research Agenda
- Promote academic and industry collaborations in conducting applied tourism research.

3. Reposition the Tourism Research Institute to deliver high-quality tourism intelligence⁹

- Position the Tourism Research Institute as a tourism intelligence center that supports evidence-based decision-making in the sector.

STRATEGY 2.3.2: ENHANCE INNOVATION IN THE TOURISM SECTOR

Strategic Activities

1. Establish a Tourism Innovation Lab/Accelerator Program

- Set up a public–private “Tourism Innovation Lab,” in partnership with ICT Authority, universities, and tech hubs, offering co-working space, mentorship, and prototyping support.
- Design and run cohort-based accelerator cycles focused on themes such as digital visitor experiences, sustainable operations, and cultural heritage digitization.

⁹ See Institutional framework.

2. Organize innovation capacity-building initiatives

- Train tourism entrepreneurs, enterprise staff, and public officers and students in innovation models
- Create a roster of mentors from tourism, tech, finance, and sustainability fields (including diaspora experts) to guide startups and innovators through idea validation, prototyping, and scaling.
- Facilitate regular mentor–mentee matching sessions and peer-learning circles.

3. Coordinate multi-stakeholder networks and global linkages

- Foster industry–academia collaboration
- Through the Tourism Innovation Council/TWG, convene regular forums where tech companies, tourism operators, investors, researchers, and policymakers share insights, identify challenges, and collaborate on joint projects.
- Link with international platforms such as UNWTO innovation initiatives, WEF tourism tech networks, global accelerators, to access best practices, mentorship, research collaborations, and funding opportunities.
- Showcase Kenyan tourism innovations at international expos and conferences.
- Facilitate partnerships between tourism and sectors such as agriculture (agritourism tech), health (wellness and telehealth for remote lodges), creative industries (digital storytelling, film tourism), and renewable energy (off-grid power solutions).

4. Establish financing and incentives for innovation

- Through the National Green Tourism Fund or a dedicated sub-fund, allocate small-to-medium grants for pilot projects that demonstrate clear sustainability or visitor-experience improvements
- Introduce tax rebates, duty exemptions, or expedited approvals for tourism businesses adopting certified green or digital innovations (e.g., renewable-energy installations, contactless services, digital waste tracking).
- Integrate innovation criteria into eco-certification schemes to reward adopters.

5. Monitoring, evaluation and Scaling of innovations

- Integrate Innovation KPIs into the Tourism Observatory’s dashboards for regular review.
- Encourage quick prototyping and testing of ideas, with mechanisms to document lessons from unsuccessful pilots.
- Provide feedback loops through the Innovation TWG to refine concepts before wider rollout.
- Organize an event where innovators present solutions, share results, and connect with investors or partners. Use it to identify promising projects for scaling and further funding.
- For pilots that demonstrate impact and feasibility, develop plans for wider roll-out across circuits or integration into national platforms

DRAFT

Strategic Direction 3

**ESTABLISH AN ENABLING POLICY, REGULATORY AND
INSTITUTIONAL FRAMEWORK**

Strategic Pillar 3.1: TOURISM POLICY, LEGAL AND INSTITUTIONAL FRAMEWORK

Introduction

Despite its vast potential and globally recognized attractions, Kenya's tourism sector continues to underperform due to weaknesses in the tourism policy, regulatory, and institutional framework. A fragmented policy environment, overlapping institutional mandates, limited inter-agency coordination, slow policy implementation, outdated regulatory standards, and insufficient private sector engagement have constrained growth and competitiveness. Additionally, the devolution of tourism functions has led to inconsistencies between national and county-level planning and enforcement, while gaps in investment facilitation and poor policy responsiveness to emerging trends, such as sustainable tourism and digital transformation, further hamper progress.

Strategic Objective

To establish a coherent, responsive, and enabling tourism policy, regulatory, and institutional framework that promotes sustainable growth and enhances Kenya's global competitiveness as a premier tourist destination.

Strategies

To realize the above objective, three strategies will be implemented

1. Enhance tourism policy and regulatory harmonization between counties and national government
2. Build capacity of public sector actors to develop and implement tourism policies and plans
3. Streamline mandates of key institutions in the sector

STRATEGY 3.1.1: ENHANCE TOURISM POLICY AND REGULATORY HARMONIZATION BETWEEN COUNTIES AND NATIONAL GOVERNMENT

Strategic Activities

1. **Establish a national-county tourism coordination framework**

- Create a formal platform to enable regular dialogue and joint planning between the Ministry of Tourism and County Executive Committees.

2. **Harmonize national tourism policy and regulations across both levels of government**

- Harmonize national and county-level policies to ensure coherence in planning, standards, and enforcement.
- Develop model county tourism laws and integrated tourism development plans with support from the national government.
- Develop a policy framework to align county-level tourism policies and plans with national priorities such as the Vision 2030 and the National Tourism Blueprint.

-
- ### 3. **Introduce regulations for emerging tourism products** (e.g., ecotourism, agritourism, wellness tourism) and digital platforms such as online booking and accommodation services.

STRATEGY 3.1.2: BUILD CAPACITY OF PUBLIC SECTOR ACTORS TO DEVELOP AND IMPLEMENT TOURISM POLICIES AND PLANS

Strategic Activities:

1. **Design and implement capacity-building programs for tourism policy and planning officers**

- Provide continuous professional development (CPD) for tourism officers on policy analysis, planning, and project management at both levels of government.
- Use real-life tourism cases to train public officials on planning under uncertainty, stakeholder coordination, and crisis response.

2. **Capacity build and coordinate tourism at the devolved governments**

- Build the capacity of county governments to manage tourism functions effectively while maintaining national oversight and alignment with national objectives.

3. **Establish a tourism leadership competency and fellowship program**

- Define key competencies required for tourism planners and implementers at all levels to guide recruitment, promotion, and training programs.
- Partner with academic institutions to offer annual fellowships or exchange programs for county and national tourism officials.

STRATEGY 3.1.3: STREAMLINE MANDATES OF KEY INSTITUTIONS IN THE SECTOR

Strategic Activity:

1) Undertake an institutional audit of tourism sector actors

- Conduct a comprehensive mapping and review of mandates, roles, and overlaps among public institutions at both levels of government
- Amend the Tourism Act and related sectoral laws to clearly define institutional roles and eliminate duplication.

Mandate and/or structures of the following institutions will be reviewed as indicated below.

1. KENYA TOURISM BOARD (KTB)

Critique of the current practice

- Centralization: KTB operates as a centralized national entity, with weak linkages to counties or regional tourism efforts. This limits the ability of regions and counties to develop tourism products and markets.
- Limited capacity support to counties: Counties are responsible for product development but receive minimal technical or strategic support from KTB.
- Overlapping mandates with MoTW: Unclear boundaries between KTB and the Ministry in some marketing roles, especially around flagship events and product launches.

There is therefore need to rethink the mandate and structure of KTB for the following reasons

- To empower counties, regions (circuits) and tourism hubs to co-own tourism growth through decentralization.
- To unlock Kenya's diversity of experiences beyond the traditional "beach and safari" model.
- To ensure marketing is evidence-driven and grounded in actual product readiness.

Proposed change:

- i. Support brand development to establish a unified tourism identity for the country
- ii. Promote the country as a whole to international markets, positioning it against global competitors.
- iii. Promote strategic national tourism flagship products and events.
- iv. Coordinate with international stakeholders like travel trade, media, and foreign tourism boards.
- v. Collect and disseminate national tourism data to inform marketing strategy and investment.
- vi. Attract major international events and strategic partnerships.
- vii. Coordinate communication on national tourism crises and disaster management initiatives.
- viii. Establish Regional Destination Marketing Organizations (RDMOs) in all tourist circuits in the country to undertake and coordinate development, branding, positioning and promotion of the circuits.
- ix. Provide technical support to regional Convention and Visitor Bureaus

2. KENYA UTALII COLLEGE

Critique of the current practice

- Curriculum misalignment with trends and sector needs
- Narrow scope with focus being primarily on pre-service training for students. There's minimal attention to in-service, managerial, or leadership-level skills development.
- Lack of sector-wide coordination: With the many other institutions now offering training in the tourism and hospitality sector, KUC has not transformed to occupy a national leadership mandate for human resource capital development for the sector. There is no systematic training needs analysis (TNA) for the sector or national curriculum harmonization leaving different institutions to adopt whatever they consider is appropriate
- Trainer gaps: There is no structured training or certification for trainers. This coupled with lack of curriculum harmonization has contributed to inconsistent quality across tourism training institutions nationwide.

- Lack of coordination in global placement of Kenyan tourism workforce: There is need to enhance opportunities for, coordinate, and assure quality for international placement for Kenyan hospitality and tourism workforce.

Why change is needed

Generally, to reposition Kenya Utalii College as a national tourism and hospitality institute with a sector-wide mandate, not just a single college. Essentially creating three arms for KUC-

- a) Single training institution (for pre-service training) and
- b) National tourism and hospitality institute responsible
 - To ensure skills development aligns with current and future industry needs.
 - To develop a pipeline of skilled managers and trainers who can cascade skills nationally.
 - To support training providers in raising training standards in the country.
 - To drive a competent, professional tourism workforce ready for regional and global placement.
- c) International workforce placement

Proposed changes (see table below)

Area	Proposed Change
Mandate	Expand to become Training Provider; oversee national training needs analysis, certification and CPD, and coordinator of international workforce placement
Governance	Align core areas with the above mandate i.e. <ol style="list-style-type: none"> a) Pre-service training b) National tourism and hospitality institute c) International workforce placement
a) CPD Delivery	Continuous professional development with focus on core sector leadership/managerial levels including supervisory level, middle level and executive level management i.e. those who can pass skills to others- CPDs should be based on identified training needs and focus on all sub-sectors not just hospitality. In delivering this, KUC will utilize both internal and external trainers including industry experts and also internal and external resources and facilities.
b) Trainer capacity building (CPD)	Assess and certify trainers across the country including ensuring skills-based continuous professional development for the trainers
c) International Placement	Create a national program to facilitate international job placement for Kenyan graduates including opportunity sourcing, recruitment, pre-placement training, coordination of relevant regulations, and monitoring welfare of Kenyans workforce abroad including maintaining a register. This essentially centralizes this mandate and assures quality and welfare of Kenyan tourism labour export.

3. TOURISM RESEARCH INSTITUTE (TRI)

Current practice critique

- Low visibility and impact: TRI has a limited record of published research that influences policy or investment decisions.
- Weak data systems: Kenya lacks a centralized, dynamic tourism data platform. Visitor statistics are unavailable at county or product level. In addition, counties, which are responsible for tourism development, have no analytical support from TRI on tourism performance, trends, or planning.
- Disconnected from global standards: TRI has not adopted global models like UNWTO's Tourism Observatories, nor built partnerships for shared data or benchmarking.

Why change is needed

- To build a tourism intelligence center that supports evidence-based decision-making.
- To provide timely, usable market and product insights to KTB, counties, and investors.
- To support county-level planning and performance monitoring through localized data.
- To align Kenya with global best practices in tourism intelligence and research.

Proposed changes (see table below)

Area	Proposed Change
Positioning	As a semi-autonomous think tank and official for sector data and intelligence under the Ministry of Tourism and Wildlife
Mandate	Shift to applied, real-time, policy-relevant research focused on market dynamics, trends, impact evaluation, and benchmarking global competitiveness.
Specific functions:	
a)Data function	Build a robust, interactive data and analytics platform for stakeholders
b)Tourism observatory	Adopt UNWTO Tourism Observatory model for monitoring key sustainability, competitiveness, and national tourism performance indicators tied to Vision 2030 and SDG goals
c)County support	Build county-level tourism data capacity, dashboards, and analytical tools
d)Private sector linkages	Establish partnerships with private sector (hotels, airlines, digital platforms) for data-sharing agreements

Organizational structure	<p>Organizational structure that focus on the following <i>Core Functional Units</i></p> <p>i). Tourism statistics and analyses Collecting and publishing key national datasets vital for understanding tourism demand and supply trends and patterns, expenditure, and performance. These will include:</p> <ul style="list-style-type: none"> • International Visitor Survey (IVS) and National Visitor Survey (NVS) (in collaboration with KNBS). • Tourism sector performance reporting and forecast modeling. • Sector sustainability, and regional impacts. • Tourism Satellite Account (TSA) • Scenario planning to help manage economic shocks <p>ii). Market intelligence and forecasting (in collaboration with KTB)</p> <ul style="list-style-type: none"> • Providing short- and long-term forecasts of international and domestic tourism. • Analyzing source markets, emerging trends, and traveler behaviour. • Helping industry and investors with risk assessment and strategic planning. <p>iii). Stakeholder engagement and dissemination</p> <ul style="list-style-type: none"> • Supply insights to tourism policy makers, operators, regional bodies, and investors to make informed decisions. • Provide information input to assist in the development of strategic tourism infrastructure and products (including mapping and feasibility studies). • Publish reports, dashboards, and infographics.
---------------------------------	---

4. TOURISM FUND & TOURISM PROMOTION FUND

Critique of current practice

- i. Duplication of roles: The two funds exist separately with overlapping mandates and administrative structures, leading to inefficiencies and accountability gaps.
- ii. Limited alignment with initiatives essential to driving strategic sector-wide growth.
- iii. There is little transparency in how funds are allocated or results measured.
- iv. Limited support to counties and private sector: There is no mechanism for competitively funding innovative county or private sector tourism projects.
- v. Tourism Fund collects levies directly from hospitality establishments. This has resulted to high administrative costs, inefficiencies, and potential for revenue leakage

Why change is needed

- To consolidate the two funds into a strategic, agile, and accountable funding body.
- To shift focus from institutional support to sector transformation priorities.

- To ensure funds are allocated through transparent, performance-based mechanisms.
- To drive inclusive tourism development across counties and emerging products.

Proposed changes

Area	Proposed Change
Institutional alignment	Merge into a single entity
Fund allocation	Introduce strategic, outcome-based allocation. In addition to its internal administrative costs, define a set formula for annual distribution of collected funds to the following Sector Strategic Thematic Areas: <ol style="list-style-type: none"> i. Destination marketing (by KTB) ii. Product development (by MoTW) iii. National tourism crises and disaster communication (by MoTW) iv. Research and intelligence (TRI) v. Visitor safety (by TPU) vi. Professional Certification and Continuous Professional Development (KUC) vii. Tourism innovation hub (s) viii. Standards and regulation (TRA) ix. Private sector specific tourism development projects (through KTF) x. plus the internal administrative costs of the Fund
Governance	Include in the Oversight Board representation of the institutions undertaking the above strategic programme areas

DRAFT

Strategic Pillar 3.2 SUSTAINABLE FINANCING OF TOURISM DEVELOPMENT

Introduction

One of the major constraints facing Kenya's tourism sector is the lack of stable, predictable, and adequate financing to support its sustainable development and long-term competitiveness. The sector has traditionally relied heavily on fluctuating public budget allocations which is often insufficient and inconsistent. This hampers investment in critical infrastructure, product diversification, community-based tourism, and environmental conservation initiatives. Furthermore, financing gaps limit the sector's ability to withstand external shocks and to embrace innovation and green technologies. To position Kenya as a competitive, resilient and inclusive tourism destination, there is a need to design strategic financing approaches that are sustainable, diversified, and anchored in effective institutional frameworks.

Strategic Objective

To establish a diversified and sustainable financing architecture that ensures adequate and continuous investment in the development, promotion and resilience of Kenya's tourism sector.

Strategies

Strategy 3.2.1: STREAMLINE FINANCING OF STRATEGIC NATIONAL TOURISM DEVELOPMENT PROGRAMMES

Key Activities:

1) Set Up a National Tourism Development Fund (NTDF)

Establish a ring-fenced, government-backed fund to support strategic investments in tourism infrastructure, product diversification, destination development, and crisis recovery¹⁰.

¹⁰ See proposed changes on Tourism Funding organizations

2) Conduct a comprehensive audit of existing tourism financing channels

Map current financing flows from national government, counties, donors, and private investors to identify overlaps, gaps, and inefficiencies.

3) Establish a central coordination unit for tourism programme financing

Create a dedicated inter-agency body (within the Ministry of Tourism) to align and coordinate financing for national tourism flagship projects.

4) Decentralize tourism financing with national oversight

- Enable counties to establish local tourism development funds, supported by transfers from national revenues, tourism fees, or local taxes.
- Ensure that these funds are aligned with national priorities and subject to performance-based funding criteria.

Strategy 3.2.2: ESTABLISH A NATIONAL TOURISM DEVELOPMENT FINANCING FRAMEWORK

Key Activities:

1. Identify and secure innovative financing instruments

Explore and pilot alternative financing tools such as tourism levies, bonds, carbon credits, green financing, and diaspora investments.

2. Leverage public-private partnerships (PPPs) for sector investment

Establish clear guidelines and incentive packages for PPPs in tourism infrastructure development, including transport, accommodations, ICT, and recreational facilities.

3. Mobilize green and climate finance for sustainable tourism

Equip tourism institutions to develop and pitch green tourism projects eligible for international climate finance (e.g., Green Climate Fund, GEF).

4.0 NTS IMPLEMENTATION FRAMEWORK

Introduction

This framework provides the relevant actions to be undertaken within each identified Strategic Pillar together with the means of verification in terms of milestone indicators. The framework further indicates the institution bearing primary responsibility and the period within which the strategic actions should have been implemented. The time schedule is further categorized into Five horizons representing the Five years within which the Strategy will be implemented. Further, the framework provides an indicative budget for each activity.

4.1 Summary of NTS Implementation Matrix (to be inserted)

4.2 NTS Financing Requirements (To be inserted)

DRAFT

5.0 MONITORING AND EVALUATION FRAMEWORK

5.1 SECTOR GROWTH TARGETS

Introduction

Kenya's tourism sector has demonstrated strong recovery and resilience, with international arrivals reaching approximately 2.4 million and earnings surpassing KES 452 billion in 2024. Building on this momentum, the sector will pursue ambitious yet achievable targets to transform the sector into a more diversified, inclusive, and high-value contributor to national development by 2030. The targets reflect Kenya's aspiration to reposition itself as a leading destination for not only traditional safaris but also Meetings, Incentives, Conferences and Exhibitions (MICE), cultural, wellness, and adventure tourism, while ensuring greater participation from communities across all counties.

This strategic outlook outlines measurable targets across key performance indicators anchored on the principles of sustainability, innovation, and equitable growth.

2024 Baseline Overview

1. International tourist arrivals: ~2.4 million (15% growth over 2023)
2. Tourism earnings: KES 452.2 billion (~USD 3.5 billion), a ~20% increase from 2023
3. Domestic overnight stays: ~5.17 million bed-nights (+12%)
4. MICE arrivals: ~643,595 individuals (27% share of all international arrivals)
5. Employment supported by tourism: >1.5 million jobs
6. GDP contribution (tourism & travel indirect + direct): ~10.5%, with direct tourism at ~2.6%
7. Classified beds: 26,786
8. Accredited beds: 72,354

2030 Targets

Indicator	2024 Baseline	2030 Target	Strategic Rationale
International Tourist arrivals	~2.4 million	5 million	Driven by product diversification, improved infrastructure, and targeted marketing.
Tourism Revenue (KES)	KES 452 billion	KES 1.2 trillion (~USD 9B)	Increased visitor spend, higher-value offerings (luxury, MICE, niche products).
Contribution to GDP (direct)	~10.5% combined (~2.6% direct)	12% combined	Strengthened linkages with agriculture, transport, culture, and manufacturing.
Tourism-related employment	>1.5 million jobs	2.5 million	Growth in formal and informal sector jobs across value chains.
Average Length of Stay	~ (Derived from 5.17M nights/2.4M arrivals ≈ 8–9 nights)	12–14 nights	Enhanced regional circuits, experiential and immersive tourism products.
Tourism Investment (annual)	~KES 100 billion (2024 spend and earnings)	KES 200 billion+ annually	Incentives for PPPs, destination branding, and improved ease of doing business.
Domestic tourism trips	~5.17M bed-nights	10 million+ bed-nights	Promotion of county-based tourism and travel among youth and middle class.
MICE Sector Share	27% (~644K arrivals)	30–35% (~1.5 million arrivals)	Expanded infrastructure (e.g., convention centers), regional and global event hosting.
Share of Niche Tourism Products	Emerging (e.g., wellness, culture, agro)	35–40% of total product range	Strategic product diversification and regional product development.
Classified beds	26,786	125,000	To cater for the growth in tourist numbers and a wide range of travelers, potentially increasing occupancy rates and revenue per available room (RevPAR).
Accredited beds	72,354	215,000	Ensure compliance with national minimum standards based on internationally recognized standards, promote sustainable tourism practices, and provide a clean, safe, and secure environment for visitors.

Critical enablers to meet targets

These targets are ambitious yet achievable, building on 2024's robust recovery. They align with Kenya's Vision 2030 and position the country to become a top-tier global tourism destination with

diversified offerings, sustainable growth, and broad-based economic impact. The projections will be underpinned by six (6) core enablers

1. **Diversify and package tourism products** – Accelerate development in wellness, culture, adventure, agro, and sports tourism.
2. **Strengthen institutional frameworks** – Institutional coordination, PPPs, and destination management capacity.
3. **Enhance connectivity and ease of access** – Expand air routes, improve domestic transport, and digital travel platforms.
4. **Scale investment in infrastructure** – Leverage the proposed development fund and PPPs to support lodging, conferencing, and access roads.
5. **Strategic market promotion** – Focus on emerging markets (e.g., Asia, Middle East), and amplify digital marketing efforts.
6. **Monitor, evaluate and adapt** – Use data-driven tools to measure KPI progress and improve through feedback loops.

DRAFT

5.2 NTS IMPLEMENTATION MONITORING AND EVALUATION PLAN

The Tourism Transformation Council (TTC) working in close liaison with MoTW will take the lead in monitoring the implementation of the National Tourism Strategy.

Each Working Committee of the National Steering Committee shall produce an annual report describing progress made against milestones and performance indicators for each activity listed in the action plans for the specific year. Comprehensive mid- and end- term implementation report will be prepared and presented by the TTC to the broad tourism stakeholders.

Each lead agency involved in the implementation of the NTS will be expected to formulate a Plan of Action (PoA) detailing how the actions falling under its mandate are to be implemented, indicating the relevant collaborating agencies, and prepared in line with the proposed time lines and budget. These individual PoA will form monitoring and evaluation tools for each lead agency.

MoCT through its planning department will facilitate technical assistance to support the review process and ensure wide distribution of all findings.

Table: NTS Monitoring and Evaluation Plan

	Nature of M&E	Time Line	Expected Output	Responsibility
1	Annual Reviews	End of each NTS implementation year	An annual report of the implementation progress for the year.	MoTW
2	Mid-term review	End of year 3	Mid-term implementation report providing achievements, challenges, way forward, and plan for the next cycle. Report to be presented to stakeholders through a workshop to enable their input.	TTC
3	Final Evaluation	End of the NTS implementation	Final NTS Evaluation report providing achievements realized, challenges faced, lessons learnt, and the way forward into the next NTS. Report to be presented to stakeholders through a workshop to enable their input.	TTC

6.0 INSTITUTIONAL FRAMEWORK

Introduction

Tourism is multi-disciplinary and multi-sectorial 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, development partners.

I. The Tourism Transformation Council

The [proposed] Tourism Transformation Council (TTC) shall be a high-level, multi-sectoral coordination body chaired by the **President**. It is established to drive the country's tourism sector as a strategic national priority. *(See Appendix for proposal on TTC)*. The TTC will specifically have the following mandates

- i. **Strategic oversight and policy direction:** Provides national-level policy guidance and strategic direction for tourism development and transformation.
- ii. **Inter-governmental coordination:** Facilitates collaboration across different ministries and government agencies to address cross-cutting issues affecting tourism.
- iii. **Project prioritization and resource mobilization:** Identifies flagship tourism projects and mobilizes resources for their implementation, often involving public-private partnerships.
- iv. **Investment facilitation:** Supports the creation of an enabling environment to attract local and international tourism investment.
- v. **Private Sector Engagement:** Ensure effective public-private partnership (PPP) frameworks and create a conducive investment climate for tourism enterprises.
- vi. **Monitoring and accountability:** Oversees performance and progress of major tourism initiatives and ensures alignment with the broader national development plans
- vii. **Conflict resolution and fast-tracking:** Resolves bureaucratic bottlenecks and inter-agency conflicts to expedite tourism-related projects and reforms.

II. National Steering Committee (NSC)

A **National Steering Committee** shall be formed comprised of Principal Secretaries and key CEOs from the various sector enablers. The proposed committee will develop clear structures that enhance coordination and foster synergies to provide a more unified, effective, and efficient strategic direction for promoting and supporting the growth of tourism in the country.

Overall, the mandate of the NSC shall include

1. **Technical coordination:** coordinate the design, implementation, and monitoring of tourism transformation programs and reforms.
2. **Project implementation oversight:** supervise implementation of flagship tourism infrastructure and destination development projects.
3. **Performance monitoring:** develop and track KPIs for tourism growth, diversification, service quality, and sustainability.
4. **Policy development support:** prepare policy papers, background research, and recommendations for TTC consideration.
5. **Stakeholder engagement:** organize forums and platforms for stakeholder consultation and feedback.
6. **Capacity building and innovation:** promote skills development, digital transformation, and adoption of global best practices in tourism.
7. **Reporting:** prepare quarterly and annual reports for submission to the TTC and publish highlights for public accountability.

III. **Ministry of Tourism and Wildlife**

Overall, MoTW, will undertake the following roles

1. Collaborate with the State Department for Devolution and Inter-Governmental Relations Committee through the established tourism sector fora.
2. In consultation with the Ministry responsible for Environment to develop and implement framework for measuring the impacts of climate change on the tourism sector
3. 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.
4. 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.

5. In collaboration with the Judiciary, operationalize the Tourism Tribunal to handle sector litigation issues.
6. In consultation with the National Police Service, operationalize the Tourism Protection Unit to handle safety and security matters in the tourism sector.
7. In collaboration with the Ministry responsible for Investment promotion identify and profile bankable and feasible investments that will benefit the tourism sector.
8. 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.
9. In partnership with research bodies and academia provide information and knowledge for evidence-based decision making.
10. In partnership with National Treasury, Development partners, and Non-State Actors, enhance resource mobilization for tourism development.
11. Collaborate with international, regional and sub-regional tourism bodies for cooperation, agreements, capacity building, marketing and initiatives relevant to tourism development.

IV. Technical and Implementation Bodies

Entity	Function
1. State Department for Tourism	Overall oversight and coordination of the sector
2. Kenya Tourism Board (KTB)	Destination branding and marketing, product development, coordination of crisis communication
3. Tourism Regulatory Authority	Regulate the tourism sector
4. Tourism Fund (TF)/Tourism Promotion Fund	Mobilizes and disburses levies and tourism development funding
5. Tourism Research Institute (TRI)	Collects, analyzes, and disseminates tourism data and intelligence; supports evidence-based policy and planning
6. Kenya Utalii College (KUC)	Capacity development for the hospitality and tourism workforce
7. Kenya Wildlife Service (KWS)	Manages national parks and wildlife-based tourism
8. National Tourism 9. Crisis Steering Committee	Coordinate crisis matters in tourism sector.
10. National Tourism Crisis Management Centre	To create policies relevant to research, guidelines, and projects designed to enhance destination preparedness management and recovery from crisis
11. Tourism Society of Kenya	To bring together tourism professionals at various levels and sub-specialization
12. Tourism Sector Associations (TSA)	Support self-regulation, mobilize and bring Tourism Stakeholders together
13. Institute of Tourism Professional Development	Continuous learning and professional development
14. Tourism Police Unit (TPU)	Offer safety and security to tourists and tourist installations, and support the enforcement of tourism laws.
15. National Convention Bureau(NCV)	Promote and market MICE tourism in local, regional and international markets
16. Kenyatta International Convention Centre (KICC)	Promote and market KICC as a premier conference facility
17. Global Tourism Resilience & Crisis Management Centre – Eastern Africa (GTRCMC-EA),	To support policy-relevant research, crisis management training, emergency preparedness, data systems, and tourism recovery strategies

6. 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 partnerships between the county governments and the stakeholders in
4. 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.

7. 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

8. 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.

9. 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

10. Development Partners

The role of Development Partners will be to:

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

DRAFT

APPENDIX: PROPOSED STRUCTURE OF THE TOURISM TRANSFORMATION COUNCIL (TTC)

Purpose:

To provide strategic leadership, policy direction, and inter-agency coordination for the sustainable transformation of Kenya’s tourism sector into a high-impact, resilient, and inclusive economic pillar.

1. Mandate

- viii. **Strategic oversight and policy direction:** Provides national-level policy guidance and strategic direction for tourism development and transformation.
- ix. **Inter-governmental coordination:** Facilitates collaboration across different ministries and government agencies to address cross-cutting issues affecting tourism.
- x. **Project prioritization and resource mobilization:** Identifies flagship tourism projects and mobilizes resources for their implementation, often involving public-private partnerships.
- xi. **Investment facilitation:** Supports the creation of an enabling environment to attract local and international tourism investment.
- xii. **Private Sector Engagement:** Ensure effective public-private partnership (PPP) frameworks and create a conducive investment climate for tourism enterprises.
- xiii. **Monitoring and accountability:** Oversees performance and progress of major tourism initiatives and ensures alignment with the broader national development plans
- xiv. **Conflict resolution and fast-tracking:** Resolves bureaucratic bottlenecks and inter-agency conflicts to expedite tourism-related projects and reforms.

1. Governance Structure

Level	Role
1) Chairperson	President
2) Secretary	Cabinet Secretary responsible for Tourism and Wildlife
3) Executive Secretariat	Housed at the Ministry of Tourism and Wildlife

4. Council Members

Member	Role/Representation
1) Cabinet Secretary responsible for Tourism & Wildlife	Sector Policy leadership
2) Cabinet Secretary responsible for National Treasury and Economic Planning	Sector financing and taxation
3) Governor, Central Bank of Kenya	Foreign exchange and monetary policies
4) Cabinet Secretary responsible for internal security	Destination safety and security
5) Cabinet Secretary responsible for Sports, Culture and Heritage	Sports tourism & heritage integration
6) Cabinet Secretary responsible for Foreign Affairs, Immigration and Diaspora Affairs	Diaspora and immigration issues, involvement of Kenya's missions abroad in Kenya's tourism promotion and investment
7) Cabinet Secretary responsible for roads and transport	Transportation infrastructure and road transport
8) Cabinet Secretary responsible for ICT	Smart tourism enablement
9) Cabinet Secretary responsible for civil aviation	Air access and low-cost carriers strategy
10) Cabinet Secretary responsible for investment promotion	Investment facilitation
11) Cabinet Secretary responsible for environmental management	Sustainability guidelines
12) Cabinet Secretary responsible for disaster management	Destination resilience
13) Chairman, Council of Governors (COG)-Tourism Sector	County integration and regional tourism development
14) CEO, Kenya Tourism Federation (KTF)	Private sector input
15) Chairperson, Kenya Private Sector Alliance (KEPSA)	Private sector input
16) Chairperson, National Chamber of Commerce and Industry (KNCCI)	Investment promotion

5. Engagement Models

- a) Quarterly council meetings chaired by the president
- b) Annual Kenya tourism summit chaired by the president to present progress, challenges, and investor opportunities
- c) County tourism transformation forums for localized input and feedback
- d) Public-private dialogue platforms for stakeholder co-creation

II. National Steering Committee (NSC)

A **National Steering Committee** shall be formed comprised of Principal Secretaries and key CEOs from the various sector enablers. The proposed committee will develop clear structures that enhance coordination and foster synergies to provide a more unified, effective, and efficient strategic direction for promoting and supporting the growth of tourism in the country.

Terms of Reference:

8. **Technical coordination:** coordinate the design, implementation, and monitoring of tourism transformation programs and reforms.
9. **Project implementation oversight:** supervise implementation of flagship tourism infrastructure and destination development projects.
10. **Performance monitoring:** develop and track KPIs for tourism growth, diversification, service quality, and sustainability.
11. **Policy development support:** prepare policy papers, background research, and recommendations for TTC consideration.
12. **Stakeholder engagement:** organize forums and platforms for stakeholder consultation and feedback.
13. **Capacity building & innovation:** promote skills development, digital transformation, and adoption of global best practices in tourism.
14. **Reporting:** prepare quarterly and annual reports for submission to the TTC and publish highlights for public accountability.

Composition of the National Steering Committee

The proposed committee will be chaired by the Chief of Staff and Head of the Public Service.

The National Tourism Steering Committee will comprise of the following State Departments;

- i. State Department for Wildlife
- ii. Principal Secretary, National Treasury
- iii. State Department for Internal Security and National Administration
- iv. State Department for Medical Services
- v. State Department for Public health
- vi. State Department for Broadcasting and Telecommunications
- vii. State Department for ICT and Digital Economy

- viii. State Department for Agriculture
- ix. State Department for Culture, Arts and Heritage
- x. State Department for Roads
- xi. State Department for Transport
- xii. State Department for Sports
- xiii. State Department for Youth Affairs and Creative Economy
- xiv. State Department for Environment and Climate Change
- xv. State Department for Blue Economy and Fisheries
- xvi. State Department for Foreign Affairs
- xvii. State Department for Diaspora Affairs
- xviii. State Department for Immigration and Citizen Services
- xix. State Department for Trade
- xx. State Department for Investments Promotion
- xxi. State Department for East African Community Affairs
- xxii. State Department for Shipping and Maritime Affairs
- xxiii. State Department for Basic Education
- xxiv. State Department for Gender and Affirmative Action
- xxv. CEO, Kenya Airports Authority (KAA)
- xxvi. CEO, Kenya Railways
- xxvii. Director-General, Kenya Civil Aviation Authority (KCAA)
- xxviii. Director-General, National Environment Management Authority (NEMA)
- xxix. Chairman, Tourism Committee of the Council of Governors

All other State Departments will be coopted to the committee from time to time based on the issues under consideration.

The steering committee will also work in close collaboration with the Council of Governors/County Governments, parliamentary committees on Tourism and Wildlife in the National Assembly and the Senate, the Kenya Tourism Federation, all tourism industry players, non-state actors, and the communities to ensure sustainable tourism growth.

The National Steering Committee will also create **clusters/technical working groups** to handle issues that are closely related including and not limited to the following

- i. Destination and product development
- ii. Tourism investment
- iii. Transport, access and infrastructure

- iv. Destination market expansion
- v. Workforce and skills development
- vi. Tourism-security coordination committee
- vii. Tourism infrastructure taskforce

DRAFT