



The **KENYA INSTITUTE** for **PUBLIC**
POLICY RESEARCH and **ANALYSIS**

Unlocking Tourism Potential in Arid and Semi-Arid Counties of Kenya

Winfred Gatwiri and Faith Kimaiyo

DP/308/2023

**THE KENYA INSTITUTE FOR PUBLIC POLICY
RESEARCH AND ANALYSIS (KIPPRA)**

**YOUNG PROFESSIONALS (YPS) TRAINING
PROGRAMME**

Unlocking Tourism Potential in Arid and Semi-Arid Counties of Kenya

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*Kenya Institute for Public Policy
Research and Analysis*

*KIPPRA Discussion Paper No. 308
2023*

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Published 2023

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ISBN 978 9914 738 33 9

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Abstract

Kenya's tourism activities are concentrated in Nairobi and coastal regions despite the existence of unique attraction sites and cultural events organised in ASAL regions such as Chalbi desert and Turkana cultural festivals. Further majority of hotel accommodation are in Nairobi and Mombasa accounting for 57.8 per cent of total bed available in the country. The study assessed the status of tourism destination competitiveness in ASAL Counties of Kenya and to reviewed the current policies that support tourism development in Kenya with a view to enhancing tourism potential in ASALs. The study used the distance to frontier methodology to calculate the Tourism Competitiveness Index. The study found out that arid counties are performing poorly in terms of tourism marketing, infrastructure, hygiene and security. The study recommends that there is need for proper marketing mostly through social media, enhancement of infrastructure, adoption of new security policies and procedures as well as ensuring hotels have adequate hygiene and sanitation in order to enhance tourism competitiveness.

Abbreviations and Acronyms

ASAL	Arid and Semi-Arid Lands
GDP	Gross Domestic Product
KNBS	Kenya National Bureau of Statistics
TCI	Tourism Competitiveness Index
UNESCO	United Nations Educational, Scientific and Cultural Organization

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1. Introduction

The tourism industry plays a crucial role in the economic prosperity of Kenya and has become a significant driver for sustainable socio-economic progress. Kenya is a popular tourist destination known for its diverse wildlife, scenic landscapes, and cultural heritage. Tourism sector contributes nearly 10.4 percent of Kenya's GDP. It is also an industry that immensely contributed to the 23 percent of employment opportunities in accommodation and food services activities in 2022 (Economic Survey 2023). The tourism industry has experienced a 63 per cent recovery in global arrivals when compared to the figures from 2019. In the year 2022, Kenya's tourism industry demonstrated a positive trend of recovery, with a significant increase of 70.45 per cent in international arrivals compared to 2021. The earnings generated from international tourism in 2022 exhibited an 83 per cent increase in comparison to 2021.

The ASALs makes up to 89 per cent of the country with approximately 38per cent of Kenya's population. The region possesses a competitive edge in the tourism industry particularly given its comparative advantage in form of tourism resource endowment. ASAL regions are home to 90per cent of the wildlife that sustains the tourism sector and encompass most of the safeguarded territories, including game reserves, cultural heritage, and national parks (State Department for the ASALs and Regional Development, 2019). The competitiveness and tourism potential in ASALs of Kenya are hindered by various factors thus limiting their ability to attract visitors, generate revenue, and contribute to sustainable economic growth.

Some tourist attraction sites in ASALs include Ishaqbini Hirola Conservancy in Garissa County, Kora national park in Tana River County, Giraffe Conservancy in Garissa County that has feeding programs for giraffes and Chalbi dessert in Marsabit County. Moreover, there is Twiga wildlife educational centre used to educate the public about the unique wildlife in the county, while Sabuli Conservancy in Wajir County is home to the endangered Somali giraffe. However, the benefits of tourism in these regions have not been exploited adequately to enhance economic growth (Kivuva, 2021). These resources have a great potential which if well tapped can generate significant amount of revenue making tourism a major activity in the region.

Cultural tourism is also a major activity in the ASAL counties and entails various activities practices in different cultures such as festivals, performing arts, cultural tours and visits to sites and monuments among others. Kenya's Maasai culture for instance is one of the main attractions for tourist (Inoti et al., 2022). Maasai tourism has been proposed as a new category of travel due to the growing interest in Maasai culture. The Maasai people have taken the lead in promoting "Maasai cultural tourism" in recent years. Ritual music and dance, beadworks and handicrafts, traditional rites like weddings and circumcisions, and cultural bomas (traditional homesteads) are all important components of Maasai culture that draw tourists. In addition to the Maasai people, the Turkana people also organise Lake Turkana cultural festival which is held in Loiyangalani a small town in Marsabit County. The aim of the three-day festival held every August is to promote peace and reconciliation as well as showcasing the rich cultural heritage of the community (Ondicho, 2016).

Furthermore, cultural festival is also an important cultural activity for instance in Lamu which hosts a four-day celebration of Lamu's Swahili-speaking community. The festival features a variety of activities, including a donkey race, swimming, dhow races, and a medley of traditional dances, all of which highlight the region's rich cultural legal. Each year, the event takes place in Lamu Old Town, one of Kenya's oldest settlements and a UNESCO World Heritage site since 2001. Lamu, sometimes called the "cradle of Swahili civilization," is also an important religious centre that draws scholars and pilgrims from all across East and Central Africa and the Middle East. During the third month of the Muslim calendar, the island plays host to the Maulidi Cultural Festival, which draws many tourists. Founded in the nineteenth century by Habib Swaleh, the event features recitations of praise poetry in Swahili inspired by the Quran, traditional music and dance, dhow and donkey races, swimming contests, calligraphy and art displays.

The contribution of tourism to the economy in the ASAL counties is estimated at 12per cent (KNBS, 2022), which is relatively low compared with the existing opportunities. Over ninety percent of all tourist attractions such as beaches, national parks, wildlife reserves, and places recognized by UNESCO as being of exceptional cultural significance are in these areas. The tourism industry is one of the top foreign currency earners and contributes significantly to the country's GDP while providing 10per cent of all jobs. ASAL counties can rely on tourism as an alternative source of livelihood in addition to pastoralism. The local community participation in tourist businesses is required, if the local community is to reap any benefits. The mutual beneficial relationship between tourism and pastoralism is a selling point for the region.

Further, this region records the lowest inbound visitors annually compared to other regions such as Nairobi and Mombasa. Statistics from the KNBS statistical abstract 2022 indicate that Northern Kenya has the lowest hotel bed occupancy rate of 4.9 percent, and the room availability is also the lowest at 5 percent compared to all hotels available. The Majority of Kenya's Hotel accommodation is in Nairobi and the coastal region, accounting for 57.8 per cent the total beds available in hotels.

Therefore, the study aims to investigate how tourism potential can be unlocked in ASAL Counties of Kenya. Specifically, the study aims to:

- i) To assess the state of tourism competitiveness in Asal Counties of Kenya
- ii) To review current policies that support tourism development in Kenya with a view to enhancing tourism potential in the ASALs.

The remainder of the paper is structured as follows: Section 2 explores the theoretical and empirical foundations underpinning the study, section 3 explains the methodology including descriptions of the dimensions under consideration, the steps involved in computing the index, and a comprehensive overview of the data sources. Section 4 into the presentation and discussion of the study's findings, while conclusions and recommendations are presented in section 5.

2. Literature Review

2.1 Theoretical literature

The theories anchoring this study were aligned with the objectives of the study and they include:

2.1.1 Destination Competitiveness model

The model of destination competitiveness was developed by Ritchie and Crouch (1999) and further improved by Dwyer and Kim (2003). Ritchie and Crouch (1999) explain destination competitiveness as a component of four pillars including attractors, supporting factors, destination management and qualifying factors. The authors identify attractors as the primary elements attracting tourist which includes natural landscape, climate, destination culture and history, mix of activities within a destination, special events such as community festivals and tourism superstructure (accommodation, food, and transport facilities).

Supporting factors are secondary factors which affect destination appeal and includes destination's infrastructure, accessibility, facilitating resources and enterprise. The infrastructure component includes the local transportation, sanitation, water supply and communications systems while on the other hand the facilitating resources is the availability of human and capital resources, education, and research institutions. In addition, accessibility involves airline regulations, visas, and permits, route connections and airport capacities. Further, Ritchie and Crouch (1999) identify destinations management components as actions that improve the attractors which include resource stewardship, marketing, organizing and service provided to visitors. Moreover, the qualifying determinants involve components that are beyond tourism sector alone which includes safety and security (involving elimination of crime, natural disaster, and quality of health care services) and cost (transportation cost, effect of exchange rate, living expenses costs.)

Dwyer and Kim (2003) in their integrative model of destination competitiveness identify resources classified as endowed resources, created resources, and supporting resources as the main elements that appeal tourist providing a great foundation for successful tourism. The 'endowed resources' are identified by the authors as natural (mountains, parks) heritage which includes cultural events and cuisines. Further, created resources refer to such resources as tourism infrastructure, entertainment, and special events. In addition, supporting resources refer to components such as general infrastructure, accessibility of a destination, hospitality and quality of services provided.

Dwyer and Kim (2003) further identified situational conditions including political, legal, technological and government regulations which affect the way organization in destinations behave. The authors further recognize factors that promote primary resources including destination policy such as tourism strategies, development of human resources, destination marketing and environmental management.

2.1.2 SERVQUAL Model

Parasuraman et al. (1985) conducted research across four service environments (retail banking, credit card services, appliance repair, and long-distance telephone services) to construct a model of service quality. The SERVQUAL model defines service quality as the degree to which actual service provided to a client meets his or her expectations for that service (Parasuraman et al., 1985). Based on research by Parasuraman et al. (1985), this model attempts to quantify the extent to which customers' impressions of a service's quality differ from their expectations, with the latter being affected by factors such as the service provider's approach to marketing and service delivery. The quality of a service is determined by taking into account the customer's opinion on both the service's delivery and its final result (Parasuraman et al., 1985). To consumers, a service is of high quality if it either fulfils or surpasses their expectations.

The SERVQUAL model asserts that there are five factors that contribute to a positive customer experience: the tangibles, which include location, amenities, and staff appearance; reliability, which entails the ability to deliver services as promised; responsiveness, which refers to a willingness to assist customers and deliver services quickly; assurance, which refers to employees' knowledge, courtesy, and ability to instil trust and confidence; and empathy, which refers to the care and individualized attention provided to each customer. The human and material components of service providing are emphasized in these categories. A study by Ladhari (2009) explains that the SERVQUAL model is a valid metric for gauging service quality in a variety of sectors. To get accurate and trustworthy results, however, it is important to use the right measurements for the right service. The SERVQUAL model is the preferred method for gauging service quality in the service industry such as tourism industry since it takes into account customers' views and expectations.

2.2 Empirical literature

Using statistical data by international organizations and the World Economic Forum's annual Executive Opinion Survey, the World Economic Forum (WEF) developed a Travel & Tourism Development Index 2021. The index is comprised of five subindexes including enabling environment which has five pillars including business environment, safety and security, health and hygiene, human resources and labour market and ICT readiness (World Economic Forum, 2022). The travel and tourism policy and enabling conditions sub index had three pillars which included travel and tourism prioritization, international openness and price competitiveness. Further, air, ground, port transport infrastructure and tourist services infrastructure were part of infrastructure subindex. The travel and tourism demand drivers sub index had three pillars including natural resources, cultural resources and non-Leisure resources while travel and tourism sustainability had three pillars including environment sustainability, socioeconomic resilience and conditions and travel and tourism demand and impact. The computation was done by aggregating the indicator scores using simple averages.

Sikawa, (2019) conducted a study to compare performance in the tourism sector in Kenya with performance in South Africa. The study aimed at providing a recommendation for the tourism sector to emulate thus improving the economic contribution of tourism to GDP. Using a case study methodology, the findings showed that some of the factors affecting tourism performance included socio-economic factors which entailed accessibility, accommodation, and existing amenities, environmental factors, marketing strategies and security factors. Further, Sagwe et al. (2010) analysed the elements of tourism destination competitiveness using panel data. The results pointed out that per capita income, technological advancement, and tourism openness affect destination competitiveness. Therefore, tourism competitiveness can be enhanced through policy interventions that favour tourism openness, such as visa fee waivers and technological advancement.

Bazargani et al., (2021) investigated the relationship between tourism competitiveness and tourism performance globally by examining the heterogeneity of countries and measures of both tourism competitiveness and performance. Using three-stage least square panel data estimation techniques, the study found out that tourism competitiveness is a major driver of tourism flows and contribution to GDP for all regions and income groups of countries worldwide. However, the effects varied based on the regions, income groups, and measures of tourism performance. The findings indicated that infrastructure is a universal driver of tourism performance, while policy conditions, enabling environment, natural and cultural resources were also identified as critical determinants. The study recommended that policymakers and stakeholders in the travel and tourism industry can focus on improving tourism competitiveness and consider the multidimensional nature of the relationship between tourism competitiveness and tourism performance in their policy frameworks. It was pointed out by Tseng (2012) that to make research consumable by policymakers and practitioners, policy papers and executive briefings should be concise for them to be easily understood.

There is a disconnect between policy intentions and actual practice, making it difficult for policies to fulfil their goals. The major reason implementation fails is due to ineffective communication between the policymakers at the top and the implementers at the bottom. Using a content analysis method and zeroing in on Zimbabwe, Chigudu (2015) examined policy concerns and the success of policy implementation. The research showed that the main reason Zimbabwe's policies were not working was attributed to a lack of action despite the existence of sound, comprehensible plans. Incompetence to put such comprehensible suggestions into action, poor sequencing of policies, political inertia to account for the failure, and insufficient resources were all identified in the report as causes of implementation gaps. The study also indicated that in addition to Zimbabwe, these issues seem to affect most sub-Saharan countries. Adam et al. (2019) asserts a government's structure is complicated since there are several bodies engaged in policy execution and coordination. Kivoi (2020) conducted a desk review of the Constitution and public participation legal frameworks (Bills, Acts, and Policies) to identify gaps, conflicts, and challenges impeding the success of public participation at the national and county levels in Kenya. According to the research, the most significant barrier to public engagement in Kenya is not the creation of new laws or regulations, but rather their actual execution.

3. Methodology

This section highlights the theoretic framework underpinning the study, a detailed explanation of the pillars used to compute TCI, the steps for TCI computation, the data sources, and how the critical review of policies was done.

3.1 Theoretical framework

The study uses the model of destination competitiveness in assessment of the tourism potential of the ASAL regions in Kenya. Competitiveness significantly affects the attractiveness of tourism destinations since it aids in comparing the competitive advantages in resource endowment of the tourism destinations. Travelers' final decisions on where to vacation are influenced by various elements such as hotels, attraction sites and infrastructure among others. When applied to the tourism industry, the concept of competitiveness refers to a country's or destination's capacity to draw in and keep visitors, produce income, and provide long-term economic and social advantages (Alseiari et al., 2019). Countries and tourist destinations may increase their chances of success in the tourism industry by working to strengthen these areas and foster conditions favourable to tourism growth. Better transportation and communication networks, more funding for tourism-industry, education and training, and new legislation supporting environmentally responsible tourism are all examples of what may enhance competitiveness in the tourism industry. Borrowing from this theory the study will use infrastructure, number of visitors to museums and snake parks, number of visitors to national parks and national reserves as well as the county expenditure.

The framework shows that tourism destination competitiveness is dependent on attractors including landscapes and destinations culture, infrastructure including local transport, accessibility, facilitating resources, hygiene, safety and security.

3.2 Pillars of Tourism Competitiveness Index (TCI)

Table 1: Description of the TCI pillars, indicators, measurements and scoring indicators

Pillars	Indicators	Measurement	Scoring of the indicators
Attraction sites	Game parks and reserves with unique natural resources.	Game parks and reserves in counties	The worst scenario is the worst performing county in the data set on unique cultural sites and the best is the best performing in the data set.
	Cultural events	Cultural activities in counties	The worst scenario is the worst performing county in the data set and the best is the best performing in the data set.

Infrastructure	Access to electricity	Access to internet connectivity in counties	SDG 7 aims for countries to attain universal access to electricity. Kenya also aims to have 100per centaccess to electricity, which forms the benchmark.
	Internet Access	Access to internet connectivity in counties	Kenya also aims to have 100per cent access to internet connectivity which forms the benchmark.
	Airports	Availability of air transport	The worst scenario is the worst performing county on airport availability and the best is the best performing is the best performing in the data set.
	Hotel classification	Availability of classified hotels (1star-5 star)	The worst scenario is the worst performing county in the data set and the best is the best performing in the data set.
Hygiene	Cleanliness ratings in hotels	Percentage of cleanness ratings based on reviews	Kenya is working towards having access to improved sanitation and hygiene by 2030 which forms the benchmark. Therefore, the worst is where the percentage of hotel cleanliness is rated is 0 per cent, and the frontier is 100 per cent.
	Availability of clean water in hotels	Percentage of clean water	According to Vision 2030 and SDG6, Kenya is working towards having access to improved water by 2030 this therefore forms the benchmark.
Security	Offenses involving Tourists	Offenses involving tourists in a given county per 100,000 people.	SDG 16 aims at significantly reducing all forms of violence and related death rates everywhere. End abuse, exploitation, trafficking and all forms of violence.
	Terror attacks (Explosives, alshaabab attacks, roadside bombs)	Total number of terror attacks reported in a given county per 100,000 population.	SDG 16 aims at significantly reducing all forms of violence.

Source: Authors

3.2.1 Steps for computing the Tourism Competitiveness Index

1. Identification and categorisation of TCI indicators

The first step involved identifying the TCI pillars and standardizing the data from different sources to percentages and rates for uniformity. The choice of indicators included in the computation was determined by literature. The components in table 1 above were used to generate the tourism competitiveness index for the ASAL counties. Sub-indices were developed for each component. A two-stage process analysis was used in the research.

2. Distance to frontier methodology

Furthermore, each indication was evaluated based on the responses and ranked according to how well it met the criteria. The indicator's greatest performance served as the indicator's frontier in the index's calculation, while the indicator's worst performance served as the indicator's worst scenario.

Equation 1 shows how the score for the sub-indicator was calculated.

$$\text{Score} = (\text{Worst-}y) / (\text{Worst-Frontier}) \dots\dots\dots (1)$$

Where *y* is the response given for each indicator, *Worst* indicates worst performance and *frontier* shows best performance in each indicator represented by the benchmark. The score ranges from zero (0) to one (1).

3. Calculation of TCI

The overall index is comprised of four pillars including attraction sites, infrastructure, sanitation and security. Each pillar has indicators used to compute sub-indices and the overall TCI is obtained from simple equal weighted average of the sub-indices. Index number theory explains that weights are typically too arbitrary and can be manipulated to get desired indices. Equal weights were used to calculate the index since using it allows researchers to avoid manipulation of data. The formula for the equal-weighted TCI is:

$$TCI = (\text{Attraction Sites} + \text{Infrastructure} + \text{Sanitation} + \text{Security}) / 4$$

Tourism Competitiveness Index comprised of for pillars which included attraction sites, infrastructure, security, and sanitation.

3.3 Policy Review

The review of the existing policies was guided by four pillars which included attraction sites, Infrastructure, hygiene, and security pillar. During the review process, a matrix was formulated indicating the policy reviewed, the key focus area of the policy in relation to the four pillars and the existing gaps in line with the pillars were analysed.

3.4 Data Sources

Secondary data sources were used during the data collection process where various documents were used. The main data sources for the study were from government reports such, National Police service report, Tourism regulatory authority reports, Kenya National Bureau of statistics (statistical abstracts, KDHS and economic surveys) and Kenya Revenue Board Road register. The trip advisor website was used to generate information on hotels. Further, the following policy documents were reviewed; Revised National Tourism Policy, Kenya Tourism Agenda (2018-2022), Tourism sector plan (2018-2022) and county policies.

4. Analysis and Findings on Tourism Competitiveness Index

This section discusses the findings, TCI scores across all counties and the four pillars used to measure the index namely Security, Attraction cites, Infrastructure and Sanitation.

4.1 Infrastructure pillar

The main indicators that were used to measure the infrastructure pillar included internet access, electricity access, hotel classification and availability of air transport.

Table 2: Infrastructure Indicators Scores

Categorization	County	Internet Access Index	Electricity Access Index	Hotel Classification Index	Air Transport Index	Infrastructure Index
Arid counties (85per cent-100per cent)	Garissa	0.06	0.24	0.00	0.25	0.14
	Isiolo	0.09	0.41	0.06	0.25	0.20
	Mandera	0.04	0.16	0.00	0.08	0.07
	Marsabit	0.04	0.00	0.00	0.17	0.05
	Samburu	0.07	0.15	0.06	0.50	0.19
	Tana River	0.06	0.26	0.00	0.17	0.12
	Turkana	0.04	0.09	0.00	0.42	0.14
	Wajir	0.04	0.14	0.00	0.08	0.06
Average Arid counties (85per cent-100per cent)		0.05	0.18	0.01	0.24	0.12
Semi-arid counties (30per cent-84per cent)	Baringo	0.08	0.28	0.00	0.08	0.11
	Embu	0.15	0.47	0.02	0.08	0.18
	Kajiado	0.29	0.67	0.06	0.25	0.32
	Kilifi	0.12	0.39	0.21	0.08	0.20
	Kitui	0.07	0.17	0.00	0.00	0.06
	Kwale	0.10	0.32	0.28	0.08	0.19
	Laikipia	0.18	0.42	0.17	0.25	0.25
	Machakos	0.18	0.48	0.06	0.17	0.22
	Makueni	0.09	0.20	0.00	0.08	0.10
	Meru	0.10	0.40	0.09	0.25	0.21
	Taita Taveta	0.16	0.48	0.06	0.25	0.24
	Tharaka Nithi	0.12	0.35	0.00	0.00	0.12
	West Pokot	0.04	0.12	0.00	0.00	0.04
	E. Marakwet	0.05	0.24	0.04	0.08	0.10

Average Semi-arid counties (30per cent-84per cent)		0.12	0.36	0.07	0.12	0.17
Semi-arid counties (10per cent-29per cent)	Homabay	0.08	0.18	0.00	0.08	0.09
	Kiambu	0.39	0.92	0.00	0.00	0.33
	Lamu	0.12	0.43	0.00	0.25	0.20
	Migori	0.09	0.23	0.00	0.08	0.10
	Nakuru	0.21	0.64	0.36	0.08	0.32
	Narok	0.07	0.20	0.53	1.00	0.45
	Nyeri	0.21	0.72	0.21	0.08	0.31
Average Semi-arid counties (10per cent-29per cent)		0.14	0.39	0.10	0.15	0.20

Source: Authors

Semi-arid counties of aridity 10-29per cent had the highest infrastructure index score at 0.20, semi-arid counties of aridity 30-84per cent at 0.17 and arid counties at 0.12 which was the lowest score. This could be an implication that they have better access to internet, electricity, classified hotels and availability of air transport compared to arid areas. Generally, the scores for all the indicators were below average with counties like Mandera, Marsabit and Wajir having the lowest scores for all the indicators on infrastructure.

4.2 Attraction sites pillar

The attraction sites Pillar measures the available natural capital in counties which was defined in terms of the natural tourist attraction sites or tourism cultural, or any unique events organized by the county to attract tourist. Counties with natural attraction sites are better positioned to attract tourists. Scores were computed by taking the average score of the indicators highlighted.

Table 3: Attraction sites index scores by counties

Category	County	Cultural Tourism (festivals, etc) index	Unique Attraction sites index	Attraction Sites Index
Arid counties (85 per cent - 100 per cent)	Garissa	0.00	0.07	0.04
	Isiolo	0.13	0.24	0.18
	Mandera	0.13	0.01	0.07
	Marsabit	0.13	0.27	0.20
	Samburu	0.13	0.31	0.22
	Tana River	0.13	0.14	0.13
	Turkana	0.13	0.30	0.21
	Wajir	0.00	0.04	0.02

Average Arid counties (85 per cent - 100 per cent)		0.09	0.18	0.13
Semi-arid counties (30 per cent - 84 per cent)	Baringo	0.00	0.27	0.14
	Embu	0.00	0.07	0.04
	Kajiado	0.00	0.79	0.39
	Kilifi	1.00	0.20	0.60
	Kitui	0.00	0.09	0.04
	Kwale	0.00	0.09	0.04
	Laikipia	0.00	0.51	0.26
	Machakos	0.00	0.11	0.06
	Makueni	0.00	0.16	0.08
	Meru	0.00	0.06	0.03
	Taita Taveta	0.13	1.00	0.56
	Tharaka Nithi	0.13	0.00	0.06
	West Pokot	0.00	0.20	0.10
E. Marakwet	0.13	0.19	0.16	
Average Semi-arid counties (30 per cent - 84 per cent)		0.10	0.27	0.18
Semi-arid counties (10 per cent - 29 per cent)	Homabay	0.13	0.14	0.13
	Kiambu	0.00	0.16	0.08
	Lamu	0.50	0.27	0.39
	Migori	0.00	0.01	0.01
	Nakuru	0.00	0.40	0.20
	Narok	0.00	0.46	0.23
	Nyeri	0.00	0.09	0.04
Average Semi-arid counties (10 per cent - 29 per cent)		0.09	0.22	0.15

Source: Authors

Based on Attraction sites index results in Table 3 above, Kilifi County ranked first with a score of 0.60 followed by Taita Taveta county with a score of 0.56 compared to the national average score of 0.18. Further, across regions, Arid counties (85per cent-100per cent) indicated the highest score of 0.18 pointing out the potential of tourism in these regions.

On cultural tourism, the indicator focused on the availability of cultural events happening at the respective counties attracting tourists to these regions including county annual cultural festivals. The higher the number of cultural events the higher the number of visitors visiting the county therefore promoting cultural tourism. Kilifi County host the highest number of annual cultural events among all counties therefore scoring the highest. These cultural festivals events in Kilifi County includes the Kilifi wellness Festival, beneath the Baobab festival, Rabai cultural

festival, Malindi festival, Kilifi County cultural festival and Kilifi gold triathlon. Lamu county followed closely with a score of 0.5 hosting events such as Lamu cultural festivals, Maulidi festival, the shela hat contest and lamu yoga festivals. Most of the Arid counties organize annual cultural events including Tobungu'u lore cultural festivals in Turkana County, the annual Maralalal international camel derby happening in Samburu County, Marsabit annual cultural festivals in Marsabit county, the Mandera somali cultural festival in Mandera county and Garissa Cultural festival in Garissa County.

4.3 Security Pillar

The security pillar comprised of two indicators including crime rates and terror attacks in the region. The scores for each indicator ranged from 0 to 1.

Table 4: Security Index Indicator Scores

Categorization	County	Crime involving tourists Index	Terror Attacks Index	Security Index
Arid counties (85 per cent - 100 per cent)	Garissa	0.00	0.69	0.35
	Isiolo	0.93	1.00	0.97
	Mandera	0.00	0.00	0.00
	Marsabit	0.00	1.00	0.50
	Samburu	0.00	1.00	0.50
	Tana River	0.79	1.00	0.90
	Turkana	0.00	1.00	0.50
	Wajir	0.00	0.94	0.47
Average Arid counties (85 per cent - 100 per cent)		0.22	0.83	0.52
Semi-arid counties (30 per cent - 84 per cent)	Baringo	0.00	1.00	0.50
	Embu	0.41	1.00	0.71
	Kajiado	0.00	1.00	0.50
	Kilifi	0.00	1.00	0.50
	Kitui	0.00	1.00	0.50
	Kwale	0.00	1.00	0.50
	Laikipia	0.00	1.00	0.50
	Machakos	0.00	1.00	0.50
	Makueni	0.00	1.00	0.50
	Meru	0.00	1.00	0.50
	Taita Taveta	0.73	1.00	0.87
	Tharaka Nithi	0.00	1.00	0.50

	West Pokot	0.00	1.00	0.50
	E. Marakwet	0.00	1.00	0.50
Average Semi-arid counties (30 per cent - 84 per cent)		0.08	1.00	0.54
Semi-arid counties (10 per cent - 29 per cent)	Homabay	0.00	1.00	0.50
	Kiambu	0.21	1.00	0.60
	Lamu	0.00	0.40	0.20
	Migori	0.00	1.00	0.50
	Nakuru	0.35	1.00	0.67
	Narok	0.00	1.00	0.50
	Nyeri	0.99	1.00	0.99
Average Semi-arid counties (10 per cent - 29 per cent)		0.09	0.90	0.50

Source: Authors

Sustainable Development Goal 16 (SDG 16) aims to foster peace, justice, and robust institutions to advance sustainable development. Its core aim is to cultivate societies marked by inclusivity, security, and the rule of law. This goal encompasses several key objectives including to diminish instances of violence and crime across various forms, including abuse, trafficking, and violence against vulnerable groups. By addressing these issues, the goal seeks to create safer environments and reduce the prevalence of harm. In this case, the arid and semi-arid regions were neutral in terms of how safe they are deemed since they received average scores of 0.52 (arid counties 85-100), 0.54 (semi arid counties 30per cent-84per cent) and 0.50 (semi-arid counties 10per cent-29per cent). Mandera turned out to be prone to terror attacks since it had the lowest index score (0.00) followed by Garissa at 0.69 implying high rates to terror attacks in the region. Contrarily, majority of ASAL counties were safe with an index score of 1.00 such as Isiolo, Marsabit, Samburu and Tana River among others. In terms of crimes involving tourists, arid counties had the highest score at 0.22 compared to semi-arid counties hence depicting that the area may not be safe for tourists. Nevertheless, the scores are below the average score of 0.5 implying that these regions are safe to a large extent.

4.4 Hygiene pillar

Maintaining high cleanliness standards in hotel rooms, common areas, and facilities is essential to prevent the spread of diseases and maintain a hygienic environment for guests. The hygiene pillar was measured using two indicators: availability of clean water in hotels and cleanliness ratings in hotels from the trip advisor. As indicated in table 5, semi-arid counties (30per cent-84per cent) performed better with a score 0.61, followed by Semi-arid counties (10per cent-29per cent). It can be noted that Arid counties (85per cent-100per cent) recorded the lowest score of all the 29 counties in this pillar with a score of 0.41.

Table 5: Hygiene scores across counties

Categorization	County	Availability of clean water in hotels Index	Cleanliness Ratings in Hotels Index	Hygiene Index
Arid counties (85 per cent - 100 per cent)	Garissa	0.23	0.29	0.26
	Isiolo	0.31	0.77	0.54
	Mandera	0.34	0.06	0.20
	Marsabit	0.42	0.00	0.21
	Samburu	0.44	0.81	0.62
	Tana River	0.43	0.38	0.40
	Turkana	0.44	0.48	0.46
	Wajir	0.31	0.87	0.59
Average Arid counties (85 per cent - 100 per cent)		0.36	0.46	0.41
Semi-arid counties (30 per cent - 84 per cent)	Baringo	0.44	0.52	0.48
	Embu	0.66	0.42	0.54
	Kajiado	0.71	1.00	0.86
	Kilifi	0.47	0.33	0.40
	Kitui	0.53	0.38	0.45
	Kwale	0.68	0.88	0.78
	Laikipia	0.61	0.90	0.75
	Machakos	0.86	0.75	0.80
	Makueni	0.86	0.81	0.84
	Meru	0.55	0.33	0.44
	Taita Taveta	0.53	0.56	0.55
	Tharaka Nithi	0.59	0.44	0.51
	West Pokot	0.81	0.38	0.59
E. Marakwet	0.75	0.40	0.57	
Average Semi-arid counties (30 per cent - 84 per cent)		0.65	0.58	0.61
Semi-arid counties (10 per cent - 29 per cent)	Homabay	0.47	0.49	0.48
	Kiambu	0.62	0.62	0.62
	Lamu	0.43	0.90	0.67
	Migori	0.77	0.26	0.51
	Nakuru	0.56	0.59	0.57
	Narok	0.67	0.73	0.70
	Nyeri	0.61	0.64	0.63
Average Semi-arid counties (10 per cent - 29 per cent)		0.59	0.60	0.60

Source: Authors' Computation

Access to clean water is essential for the hygiene and wellbeing of tourists. Destinations that prioritize access to safe water helps keep tourists healthy and minimizes the risk of health-related issues during their stay. According to the Kenya Vision 2030 and SDG 6, Kenya is working towards all counties having access to improved water by 2030. The lowest score of 0.36 in terms of access to clean water therefore implies that for these counties to be competitive, access to clean water amenities has to be improved.

Further, clean and well-maintained restroom facilities, proper waste disposal systems, and safe food preparation practices all contribute to reducing the risk of illnesses among tourists. As per Kenya Sanitation and Hygiene Program (KESHP), the goal is to ensure universal access to improved hygiene and sanitation in Kenya by the year 2030. Table 5 indicates that based on hotel reviews hotels in Arid counties are not doing well on cleanliness. On average, Arid County scored 0.46 which was below the national Average.

4.5 Overall Index on Tourism Competitiveness

Table 6 indicates that Tourism Competitiveness Index varies across counties and across regions. Semi-Arid Counties (10per cent-29per cent) generally performed well with a score of 0.39 followed by Semi-Arid Counties (30per cent-84per cent) with a score of 0.38 while arid counties (85per cent-100per cent) had the lowest score at 0.30. The variations in scores were however minor and below the average score of 0.5 which means that both the arid and semi-arid counties are less developed in some respects such as infrastructure and level of hygiene in hotels.

Table 6: Tourism Competitiveness Index (TCI)

Categorization	County	Infrastructure Index	Attraction Sites Index	Security Index	Hygiene Index	Overall TCI
Arid counties (85 per cent - 100 per cent)	Garissa	0.14	0.04	0.35	0.26	0.19
	Isiolo	0.20	0.18	0.97	0.54	0.47
	Mandera	0.07	0.07	0.00	0.20	0.08
	Marsabit	0.05	0.20	0.50	0.21	0.24
	Samburu	0.19	0.22	0.50	0.62	0.38
	Tana River	0.12	0.13	0.90	0.40	0.39
	Turkana	0.14	0.21	0.50	0.46	0.33
	Wajir	0.06	0.02	0.47	0.59	0.29
Average Arid counties (85 per cent - 100 per cent)		0.12	0.13	0.52	0.41	0.30

Semi-arid counties (30 per cent - 84 per cent)	Baringo	0.11	0.14	0.50	0.48	0.31
	Embu	0.18	0.04	0.71	0.54	0.37
	Kajiado	0.32	0.39	0.50	0.86	0.52
	Kilifi	0.20	0.60	0.50	0.40	0.42
	Kitui	0.06	0.04	0.50	0.45	0.26
	Kwale	0.19	0.04	0.50	0.78	0.38
	Laikipia	0.25	0.26	0.50	0.75	0.44
	Machakos	0.22	0.06	0.50	0.80	0.40
	Makueni	0.10	0.08	0.50	0.84	0.38
	Meru	0.21	0.03	0.50	0.44	0.29
	Taita Taveta	0.24	0.56	0.87	0.55	0.55
	Tharaka Nithi	0.12	0.06	0.50	0.51	0.30
	West Pokot	0.04	0.10	0.50	0.59	0.31
	E. Marakwet	0.10	0.16	0.50	0.57	0.33
Average Semi Arid counties (30 per cent - 84 per cent)		0.17	0.18	0.54	0.61	0.38
Semi-arid counties (10 per cent - 29 per cent)	Homabay	0.09	0.13	0.50	0.48	0.30
	Kiambu	0.33	0.08	0.60	0.62	0.41
	Lamu	0.20	0.39	0.20	0.67	0.36
	Migori	0.10	0.01	0.50	0.51	0.28
	Nakuru	0.32	0.20	0.67	0.57	0.44
	Narok	0.45	0.23	0.50	0.70	0.47
	Nyeri	0.31	0.04	0.99	0.63	0.49
Average Semi-arid counties (10 per cent - 29 per cent)		0.26	0.15	0.57	0.60	0.39

Source: Authors' Computation

4.6 Policy Review

Table 7: Review of tourism policies

Policies	Key Areas of Focus	Policy Issues
<p>Pillar: Infrastructure</p>		
<p>Revised National Tourism Policy, 2020</p>	<ul style="list-style-type: none"> • Prioritize upgrading, rehabilitation and maintenance of roads to access regional and local tourist destinations. • Ensure that international, domestic airports and air airstrips are maintained, secure and further maintain competitive charges to attract tourists. • Modernize Jomo kenyatta International Airport (JKIA) and local airstrips in Kenya • Expand the railway network to cover other regions in the county • Develop online tourism portal, provision of Wi-Fi internet and ensure provision of internet at tourist facilities • Encourage use of renewable energy including solar 	<ul style="list-style-type: none"> • Access to internet in Asal regions is still low • Railway network has not yet been expanded to Asal regions of Kenya. • Local airstrips in Asal regions are still not yet modernized
<p>Tourism Sector Plan (2018-2022)</p>	<ul style="list-style-type: none"> • Establishment of Hotel refurbishment fund aimed to offer accessible credit to hotel for modernization or refurbishment. • Development road networks connecting to key tourism circuits. • Expand local air travel and lobby for airport upgrade. 	<ul style="list-style-type: none"> • The Refurbishment fund has not yet been implemented. • Road network in Asal counties is still poor.
<p>Kenya Tourism Agenda 2018-2022</p>	<ul style="list-style-type: none"> • NTB 2030 acts as Kenya's tourism transformational framework from 2017 to 2030 • The innovation center will be comprised of competitions, incubators as well as challenges meant for nurturing various tourism travel experiences. 	<ul style="list-style-type: none"> • Inadequate adaption and innovation in the tourism industry based on the global trends. • Low technology uptake by local communities in ASAL regions
<p><i>Innovation Hub</i></p>	<ul style="list-style-type: none"> • The strategy aims at transforming and developing tourism in the coastal region by making it competitive. • Tourism organizations developed and run by the private sector, each one set up to oversee the hospitality industry in a specific beach town. • Need to redesign and replan Mama Ngina Waterfront and Jomo Kenyatta Public Beach since they are the only public waterfronts in Mombasa. 	

Policies	Key Areas of Focus	Policy Issues
<p>Tourism Infrastructure (Tourism Roads) <i>Malindi-Watamu Beach Road</i> <i>Mombasa-Malindi Dual Carriage</i></p>	<ul style="list-style-type: none"> Establish the status of the road and constraints faced by its users as well as intervene for prioritization of development. Encroachment by informal economic operations, congestion and traffic jams among other activities on the Mombasa-Malindi Dual Carriage may diminish the quality of the tourist experience. It has to be repaired as part of the revitalization of coastal tourism. Major roads which will enhance tourism experiences in Kenya have been identified and brands names have been assigned to them (Classic Maasai Mara, Back to Our Roots, NBI-MSA Artery). The status of the corridors will be established and there will be an intervention for prioritisation. 	
<p>Pillar: Attraction Sites</p>		
<p>Kenya Tourism Agenda 2018-2022 1. Tourism Product <i>Beach Strategy</i> <i>Mombasa Waterfront</i> <i>Little Theatre Mombasa</i></p>	<ul style="list-style-type: none"> The strategy aims at transforming and developing tourism in the coastal region by making it competitive. Need to redesign and replan Mama Ngina Waterfront and Jomo Kenyatta Public Beach since they are the only public waterfronts in Mombasa The Little Theatre in Mombasa underwent renovations and reopened, enriching the city's cultural offerings and promoting the integration of many traditions. 	<ul style="list-style-type: none"> Relying heavily on international leisure and less source markets The strategy has only focused on the coastal region and no information on ASAL areas Mombasa waterfront development was completed and is operational. However, Most of the places to stay, especially beach resorts and some lodgings are old and need to be renovated or fixed.

Policies	Key Areas of Focus	Policy Issues
<p>2.The African Safari Experience <i>Amboseli National Park</i></p>	<ul style="list-style-type: none"> • Since the park is a great place to see animals and explore nature, while Mount Kilimanjaro serves as a stunning background. It will be advertised as a stop on the Amboseli-Nairobi-Nakuru tourist route to improve the overall quality of the trip. • Development of Amboseli National Park Management Plan has been completed and gazetted • The Amboseli National Park has undergone a number of improvements in recent years, including the maintenance of its 226 km road network, the rehabilitation of its 28 km access road (Kimana- Meshanani-Namanga), the maintenance of its 1.2 km airstrip, the refurbishment of all bandas and observation points, the creation of the Tembo naming concept, and the launch of a festival in October 2021. 	<ul style="list-style-type: none"> • Amboseli is too small to support viable populations of certain species hence depends on community lands • Poaching and human wildlife conflict are challenges facing the ecosystem, but conversion of corridors to farmland presents a bigger problem. • Confining the wildlife to the park will not be sustainable • The parks are under unprecedented pressure due to rapid urbanization and infrastructural expansion. • The government of Kenya is heavily investing in infrastructure projects with the aim of achieving Vision 2030. However, most projects such as roads, railways and power plants among others are taking up spaces meant for parks • Kenya is yet to develop a balance between development and conservation.
<p>New Tourism Strategy For Kenya 2021-25</p>	<ul style="list-style-type: none"> • Increase the global visibility of national parks through brand recognition. • Mobilisation of private sector investment • Prioritization of four coastal zones including Mombasa, Lamu, Malindi and Diani • Reduction of overcrowding in selected premium parks and strengthen branding. • Management of total revenues which will aid in securing resources for KWS • Ensure national parks are affordable to citizens which will encourage their participation in tourism. • Development of a system for digital ticketing for visitors in high volume parks 	<ul style="list-style-type: none"> • Inadequate effort has been put into branding Kenya's tourist attraction sites to accurately represent the diversity of tourism in the country.

Policies	Key Areas of Focus	Policy Issues
Tourism Sector Plan (2018-2022)	<ul style="list-style-type: none"> • Redesigning Mama Ngina beach to an international standard • Development of a theatre in Mombasa • Development of tourism city in Shanzu area. • Formulation of Masai mara tourism strategy • Develop Mombasa and Nairobi international convention Center and modernize KICC. • Development of cultural festivals activities • Development of Lamu, Isiolo and Turkana resort cities 	<ul style="list-style-type: none"> • Most of the sector plans focused in development of Mombasa county tourist attraction places • Lamu, Turkana and Isiolo Resort Cities have not been developed even though a notice for intention to acquire land was gazetted in 2019.
Pillar: Hygiene		
Revised National Tourism Policy, 2020	<ul style="list-style-type: none"> • Ensure the provision of clean water and provision of sewerage services in tourist areas. • Ensure appropriate disposal of waste. • Promote competitive water charges. • Promote hygiene standards 	<ul style="list-style-type: none"> • Most Asal Counties have not yet accessed 100 percent clean water. • Water charges are still high.
Pillar: Security		
Revised National Tourism Policy, 2020	<ul style="list-style-type: none"> • Tourism protection service to be established to provide security to tourists. • Encourage collaboration between government, private and communities in security provision and safety of tourists. • Development a Tourism Crisis management centres and strategies that will guide the operation of this centre 	<ul style="list-style-type: none"> • In the previous years, Kenya has seen severe terrorist attacks and acts of violence, culminating in travel advisories enforced by important source markets, resulting in a decline in foreign visitors.

5. Conclusion and Policy Recommendations

5.1 Conclusion

This study focused on investigating how tourism potential can be unlocked in ASAL Counties of Kenya. Specifically, the study sought to assess the state of tourism competitiveness in ASAL Counties of Kenya and to review current policies that support tourism development in Kenya with a view to enhancing tourism potential in the ASALs. The overall Tourism Competitiveness Index (TCI) showed that arid counties had the lowest score (0.30) on average for all the pillars compared to semi-arid counties (0.38) of arid 30 per cent to 84 per cent.

The policy review implied that there are various gaps that emanate from the policies that have been in place in the tourism industry. One of the gaps that stood out was that the policies do not discuss how ASAL counties can be factored in to enhance tourism potential in those regions. This is in terms of for instance enhancing infrastructure as well as proper branding and development of the attraction sites among others. Instead, these policies mostly have focused mainly on Nairobi and Mombasa counties whose tourism potential has already been tapped.

5.2 Policy Recommendations

To enhance tourism potential in the ASALS, the County Governments in collaboration with the National government, private sectors and development partners may consider the following recommendations:

Attraction Sites

- i) The tourism sector needs to address the pending key focus areas including development of the resort cities in Lamu, Turkana and Isiolo since it was not implemented in the tourism sector plan (2018-2022). Further, there is need to incorporate ASAL counties tourism destinations development in the 2022-2027 tourism sector plan. Regarding the national parks, it is recommendable for Kenya Tourism Agenda to address the issue of parks being under pressure due to rapid urbanisation. Spaces meant for parks need to be conserved and the wildlife protected.
- ii) Utilize social media, private travel agencies to widely market available attraction sites and cultural activities happening in ASAL counties of Kenya.
- iii) Ensure creation of website that are user-friendly and informative for the attraction sites available at the ASAL Counties is created. The website needs to highlight details like places where they are located, how visitors can get to the place, opening hours, ticket prices, nearby accommodation, special events and special species of wildlife located in the specific site.

- iv) Develop a guided tourist calendar that runs through the year highlighting cultural events, interesting activities that take place and places to visit in the ASAL areas. Knowledgeable calendar guides provide tourists with insights of when events will be happening, and they can plan their travel on time.
- v) Organize more regular county cultural festivals, exhibitions, and events showcasing local traditions, music, dance, art, and cuisines. Such events attract more tourists and provide opportunities for cultural exchange and generation of income other.
- vi) Ensure that local communities are entirely and largely involved in planning the cultural events therefore promoting long term success of cultural tourism.

Infrastructure

- i) The Government needs to fully implement the Revised National Tourism Policy, 2020. The policy prioritizes development of infrastructure through maintenance of roads and air transport and development of online tourism portal which if implemented will greatly boost tourism.
- ii) Develop cultural routes that easily connect cultural destinations and events thereby encouraging tourists to explore different aspects of the ASAL counties over a longer stay.
- iii) Develop and ensure improvement in hotel infrastructure since ASAL counties have very few classified hotels. This may include developing on site recreational facilities like fitness centres. Upgrading hotels and resorts with modern amenities will promote overall experience for both local and international tourists.
- iv) There is need to fully implement the Revised National Tourism Policy, 2020 which provides for establishment of tourism protection service and tourism crisis management centres.
- v) There is a need to train hotel security personnel regularly to increase their effectiveness in protecting the hospitality business.
- vi) Various organisations including hotels ought to adopt new security policies and procedures to keep up with the changing nature of security threats mostly in the ASAL counties.
- vii) There is a pressing need to legitimize specialized security organizations in the hospitality and tourist sectors to combat terrorist attacks, and for these agencies to coordinate their efforts.
- viii) The hotel business needs an enhanced standardized platform for security processes that are in line with globally recognized norms.

Sanitation

- i) It is crucial to fully implement the Revised National Tourism policy, 2020. The policy aims to ensure that all tourists areas are provided with clean water and sewerage services. ASAL counties are yet to have access to
- ii) It is crucial for counties to ensure that all hotels to have access to clean water.
- iii) Establish and implement policies that ensure all hotels to maintain cleanliness and adequate sanitation facilities in all counties including the ASALs.

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Appendix

Appendix 1: Descriptive Statistics

Arid (85 per cent - 100 per cent)

	N	mean	sd	min	max
Internet Percentage	8	5.412	1.861	3.5	8.9
Access to Electricity	8	20.414	10.623	8.6	40.6
Hotel Classification	8	.75	1.389	0	3
Airports	8	4.724	4.103	.437	12.036
Game Parks and reserves with unique natural resources	8	2.375	1.506	0	5
Cultural Events	8	.75	0.463	0	1
Offenses involving tourists	8	21.96	10.958	8.531	39.958
Terror Attacks	8	3.375	7.029	0	20
Cleanliness ratings in hotels	8	36.388	8.059	22.8	44.3
Availability of clean water in hotels	8	21.8	10.888	8.8	36.5

Semi Arid (30 per cent - 84 per cent)

	N	mean	sd	min	max
Internet Percentage	14	12.754	6.443	3.5	29.1
Access to Electricity	14	36.538	15.052	11.8	67.4
Hotel Classification	14	3.846	4.896	0	15
Airports	14	8.599	3.340	2.961	15.629
Game Parks and reserves with unique natural resources	14	1.385	0.961	0	3
Cultural Events	14	.769	2.204	0	8
Offenses involving tourists	14	46.06	21.463	21.57	98.466
Terror Attacks	14	0	0.000	0	0
Cleanliness ratings in hotels	14	63.792	14.080	44	86
Availability of clean water in hotels	14	41.977	11.591	20.2	61.4

Semi Arid Counties (10per cent-29per cent)

	N	mean	sd	min	max
Internet Percentage	7	15.275	11.404	5	39.1
Access to Electricity	7	44.6	28.093	18.4	91.7
Hotel Classification	7	7.5	10.823	0	28
Airports	7	12.296	5.052	4.841	19.705
Game Parks and reserves with unique natural resources	7	1.375	1.061	0	3
Cultural Events	7	.75	1.389	0	4
Offenses involving tourists	7	47.196	21.332	22.11	74.029
Terror Attacks	7	.25	0.707	0	2
Cleanliness ratings in hotels	7	61.013	12.070	43.2	76.9
Availability of clean water in hotels	7	36.313	11.745	17.5	50.7

ISBN 978 9914 738 33 9

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