REPUBLIC OF KENYA

MINISTRY OF TOURISM AND WILDLIFE



POLICY BRIEF ON

IMPACT OF COVID-19 ON TOURISM IN KENYA, THE MEASURES TAKEN AND THE RECOVERY PATHWAYS

Domestic **Tourism Recovery Strategies** For Kenya



THIS RESEARCH HAS BEEN COMMISSIONED BY THE NATIONAL TOURISM CRISIS STEERING COMMITTEE UNDER THE MINISTRY OF TOURISM AND WILDLIFE, KENYA

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PREFACE

The National Tourism Crisis Steering Committee was appointed by the Cabinet Secretary, Ministry of Tourism and Wildlife to among others, "*be the crisis management co-ordination, response and steering organ for any crises in the tourism industry*" and gazetted on 27th March 2020, *Gazette Notice No. 2701*. In execution of its mandate, the Committee in collaboration with several agencies that included Tourism Research Institute, Kenya Tourism Board and the Kenya Wildlife Service as well as the Kenya Tourism Federation, commissioned this study that was spearheaded by Kenyatta University entitled the '*Impact of COVID-19 on Tourism in Kenya, the Measures taken and the Recovery Pathways'*. I therefore wish to thank these institutions, particularly the Kenyatta University team coordinated by Dr. Esther Munyiri, for their invaluable support.

Tourism is one of the key sectors in Kenya's economy and its resilience is critical for socio-economic development and sustenance of livelihoods in the Country. Despite its remarkable growth over the years, the sector has however witnessed unprecedented reversals, not only in Kenya but globally, occasioned by the Corona Virus pandemic. COVID - 19 was reportedly first detected in Wuhan, China in December 2019 and rapidly spread around the world, shutting down the global economy.

This report is a culmination of collaborative efforts by various stakeholders whom despite the current situation in the Country due to the COVID-19 pandemic, participated in this research that was principally aimed at finding ways in which the tourism industry can be reset when the pandemic has been contained.

All stakeholders in the industry were represented during the research journey, and we are truly grateful for their support. We look forward to the continued good working relations not only during this period, but also in the future as we jointly strive to take the sector to greater heights.

The completion of this research could not have been accomplished without the support provided by the Principal Secretary, Hon. Safina Tsungu, CBS, to examine matters that have affected tourism in the wake of the pandemic.

Lastly, I'd like to appreciate the leadership role provided by the Cabinet Secretary, Hon. Najib Balala, EGH, to enhance resilience of Kenya's tourism sector during this period. This will ensure that the gains made so far in the tourism sector are not eroded by the COVID-19 pandemic.



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1. Introduction

The Travel and Tourism industry is a significant contributor to the economic development of most economies in the world. The tourism sector is one of the key economic drivers in Kenya generating 8.8% of the country's GDP, worth USD 7.9 billion in 2018 (Standard Media Group, 2019). This represents a growth of 5.6%, which was greater than the global average of 3.9% and the Sub-Saharan Africa average of 3.3%. The industry further contributes about 8.3% of the total employment, which is equivalent to 1.1 million jobs (Ministry of Tourism & Wildlife, 2018). While countries often tend to focus on international tourism due to the revenue earned through exports, domestic tourism remains the leading form of tourism, representing an important tool for regional economic growth and development (WTTC, 2018). Kenya is the third largest tourism economy in Sub-Saharan Africa after South Africa and Nigeria both of which grew substantially less than Kenya in 2018 (Standard Media Group, 2019). This impressive performance is threatened by the COVID-19 pandemic that has impacted heavily on travel and tourism worldwide.

A significant number of countries in Africa have already realized the potentially positive economic impact of domestic tourism and have taken steps to develop and implement domestic tourism strategies (Ndlovu, 2010). The Ministry of Tourism and Wildlife in Kenya has recognized that domestic tourism is an essential contributor to the growth of Kenya's tourism economy (Ministry of Tourism & Wildlife, 2018). Therefore, the need for the development of a domestic tourism Growth Strategy for Kenya, to help tap into the domestic tourism potential to boost the much needed tourism revenues**.** This recovery strategy outlines strategic actions to sustainably grow and develop domestic tourism.

1.1 Objectives

1. Increase the number of Kenyans involved in domestic tourism.
2. Increase the revenue generated from domestic tourism by increasing expenditure.
3. Maintain tourism resources and infrastructure by addressing seasonality and equitable geographical spread through domestic tourism
4. Enhance national integration, cohesion and pride through domestic tourism.

1.2 What is Domestic Tourism?

Domestic tourism involves activities of persons travelling to and staying in places outside their usual environment but within their country of residence for not more than one year for leisure, business and other purposes (UNWTO, 2010). Domestic tourism provides paramount support to the tourism industry in various areas of performance such as bridging the seasonality gap, regional dispersal and increased domestic spending. A vibrant domestic tourism industry can generate substantial visitor spending contributing to the industry's overall sustainability, financial resilience, and functionality in off season months (Kwoba, 2018).

1.3 Role of Domestic Tourism Globally

Domestic tourism is the main driving force of the Travel and Tourism sector in major economies globally, accounting for a total travel and tourism spending of 73% in 2017 and 71.2% in 2018. The total global domestic travel and tourism spending was US$ 3,971 billion in 2017 (WTTC, 2018). China is now the leading domestic tourism market, up from 4th position in 2008, having accounted for 62% of absolute growth in this period, reaching domestic tourism spending of US$ 840.9 in 2017 from US$ 208.5 billion in 2008. The USA recorded domestic tourism spending of US$ 803 billion in 2017, coming second after China. Jointly, these two countries accounted for over 40% of world's total domestic travel and tourism spending (WTTC, 2018).

Germany ranked third in domestic tourism spending in 2017 with US$ 340 billion, nearly double the amount of India and Japan, which came fourth and fifth with US$186 and US$183 billion respectively (WTTC, 2018), as shown in Table 1.

Table 1: Top 10 Countries' positions in domestic visitor spending in 2017 (US$bn real prices)

Rank	Country	Spending	% Share of Internal T&T Spending 2017
1	China	840.9	87
2	United States	802.8	80
3	Germany	339.7	87
4	India	186.0	87
5	Japan	182.8	84
6	United Kingdom	169.6	83
7	Italy	149.0	77
8	France	127.5	72
9	Mexico	115.9	84
10	Brazil	99.9	94

1.4 Reliance on Domestic Tourism

In many countries, domestic tourism spending account for more than 50% of the total Travel & Tourism spending. For example, in Brazil, domestic tourism spending accounts for 94% while in India, Germany, China and Argentina each the share is 87%. In Japan, Mexico, the UK and the US, domestic tourism spending accounts for 80% of all travel and tourism spending.

1.5 Case Studies on Importance of Domestic Tourism

The following are case studies showing the importance placed on domestic tourism in selected countries.

Japan

Japan retains the position of the third largest travel and tourism economy in the world according to a WTTC research. In 2018, travel and tourism contributed USD367.7 billion to the country's economy. This shows Japan's travel and tourism economy grew at an annual rate of 3.6%. This represents 7.4% of all economic activity in Japan and supports 4.6 million jobs, or 6.9% of employment. The tourism economy is primarily driven by

domestic leisure travellers who account for 82% of the tourism spending. This is attributed to the government effort in developing relevant strategies by selecting attractive local themes such as hot springs, food, history and nature. This is done while promoting international events as part of the multi-faceted tourism strategy thus enabling Japan develop and grow further as a popular destination.

United Kingdom

United Kingdom (UK) continues to dominate the tourism market globally and has seen great numbers visiting. Tourism contribution to United Kingdom's GDP in 2018 was 11%. Domestic tourism remains the biggest component of tourist spending in the UK, with 2018 expenditures totalling £23,961 million, according to VisitBritain. In 2018, the number of domestic visits was over 50% higher than the number of foreign trips. There were 118.6 million domestic tourism visits in Great Britain In 2018; around 97.4 million domestic trips were made to England 11.8 million were made to Scotland. And a further 10 million were made to Wales (Foley, 2019).

USA

Travel and tourism is a booming industry in the United States. Domestic and international travellers contributed nearly 1.1 trillion U.S. dollars to the country's GDP in 2018. Domestic travel spending has consistently contributed more than international travel, making up around 80% of spending year-on-year for the past five years. However, while international visitors are a key component in the industry, domestic travellers account for a vast majority of the overall spenders with main hot spots for travellers being New York City ranked top 10 cities globally for both international arrivals and visitor spending.

France

Although France is a popular destination to most international travellers, the majority are domestic (70%). In 2018, France received nearly 90 million foreign tourists which were one million higher compared to the previous year. However, during the "Yellow Vest" social crisis that erupted coupled by the terror attack in 2017, several decline in tourist numbers mainly from long-haul destinations was witnessed. However, the number of European tourists, who accounted for 80 percent of France's foreign visitors, reported a "very moderate" drop. Most visitors to France concentrate on main product - culture based, city tours which have been well developed. Consequently, the government has endeavoured in the promotion of village / rural tourism under the "green tourism" which sells the rural life and serenity.

From the above case studies, it is evident that domestic tourism continues to be many countries' priority markets. It is also important to note that these destinations have a variety of products to offer to their guests, which continuously make them the most preferred destinations for tourists. France for example, was able to bounce back easily when it was hit by crisis, due to the regional and domestic travellers segments who continued to consume their products when international tourists could not visit the

country. A multidimensional policy approach from National to County level, Long-term vision, Collaboration/partnerships and innovation are essential towards achieving the objective of promoting domestic tourism in Kenya.

1.6 Key Reasons for Domestic Tourism Growth in the World

The key reasons why China's domestic tourism market has increased by 62% from 2008 to 2017 are government support and the growth of the middle-class. Government support relates to investing in the development of a rail network and air infrastructure by introducing low-cost carriers. For instance, every year since 2013, China has built an average of eight new airports, and rapidly developed its high-speed rail network over the last 15 years which has opened-up previously remote places to domestic tourists. This has improved transportation connectivity and reinforced tourism development in less visited areas. Reasons for growth of domestic tourism in other countries include an increase in spending power among domestic consumers; the large size of the countries; governments' initiatives in promoting new locations and strong or improving transportation infrastructure such as airports and economic links between different internal locations (WTTC, 2018).

1.9 Domestic Tourism Growth in Africa

Many developing countries have shown significant growth in travel and tourism domestic spending, as residents with rising disposable income begin to explore their countries (WTTC, 2018). For example, within Africa, in South Africa's, the number of day trips decreased from 48.0 million in 2017 to 42.0 million in 2018. Overnight trips increased from 44.4 million in 2017 to 45.5 million in 2018. Total expenditure increased from USD4.6 billion in 2017 to USD5.5 billion in 2018, which was driven mostly by an increase in spending on domestic transport; shopping; food and beverages; and accommodation (Republic of South Africa, 2018).

1.10 Kenya's Domestic Tourism Market

In Kenya, domestic tourists' bed-night occupancy accounts for more than 50% of the Bed Occupancy from 2015-2018. The number of domestic tourists bed-nights has increased from 2,948,000 in 2014 to 4,559,000 in 2018, as indicated in Table 2 (KNBS, 2019).

Table 2: Domestic tourists bed-night occupancy (in thousands KSh)

(000)	2014	2015	2016	2017	2018	2019*
Domestic tourists Occupancy	2,948.7	3,154.1	3,495.9	3,645.1	4,559.8	4,559.8
International tourists Occupancy	3,332.9	2,724.5	2,952.6	3,529.1	4,058.1	
Total tourists Occupancy	6,281.6	5,878.6	6,448.5	7,174.2	8,617.9	
Available bed capacity	19,877.2	20,187.2	21,258.5	22,987.1	26,500.6	
Kenyan Residence (%)	**46.9**	**53.7**	**54.2**	**50.8**	**52.9**	

**Estimate by Tourism Research Institute (TRI)*
Source: KTB

The importance of domestic tourism in Kenya was fully realized following major disasters such as the 2002 Kikambala bombings, Kenya's post-election violence of 2007, September 2013 West Gate Mall terrorist attack and its aftermaths, 2015 El Nino flooding, the global economic downturns in key source markets and the disaster of Ebola in the west African countries from March 2014 to 2015 (Kwoba, 2018). Following a series of terrorist attacks in 2015, international tourists bed-nights dropped by 18.2% from 3,332,900 in 2014 to 2,724,500 in 2015. With international tourist arrivals downturn between 2011 and 2015, Kenya's Ministry of Tourism & Wildlife (MoTW) launched new marketing campaigns targeting domestic tourists as an alternative to bolster tourism revenues through raising their share of total occupied hotel bed-nights (Oxford Business Group, 2017). This shows that domestic tourism has shown more resilience to external negative impact than international tourism, the reason it should be given a priority in tourism marketing in Kenya.

1.11 Efforts in Promoting Domestic Tourism in Kenya

Traditionally, Kenyans have been reluctant to travel for leisure, even during holiday seasons such as Easter and Christmas. They tend to limit their travel to Visiting Friends and Relatives. Over the last few years, the MoTW as well as local travel agencies are involved in a co-ordinated marketing effort aimed at promoting domestic tourism in Kenya. The major effort in domestic tourism promotion has been a series of campaigns spearheaded by the MoTW and the Kenya Tourism Board (KTB)—a parastatal responsible for marketing tourism for the country. Further, KTB has over the years increased its funding to include innovative domestic marketing initiatives such as digital campaigns.

As part of its efforts to encourage domestic tourism, the MoTW launched a USD300, 000 SMS campaign aimed at drawing in new domestic travellers, as a part of the sector's recovery strategy, which the government began developing in 2014. The eight-week campaign, kicked off in January 2016. The campaign offered prizes, including two - and three-night vacation packages to destinations such as Kibo Safari Camp, Amboseli National Park, the Maasai Mara Game Reserve and the Samburu National Reserve (Oxford Business Group, 2017).

KTB has continued to actively develop new marketing campaigns for the domestic tourism industry, launching the *#TembeaKenya* and *#MagicalKenya* hashtags to encourage Kenyans to explore their own country, with a special emphasis on national parks in the Maasai Mara, Mount Kenya, Amboseli and Tsavo areas (Oxford Business Group, 2017). Another initiative from the private sector is the Okoa Holiday initiative that allows one to go on vacation and pay later. All these efforts have increased the popularity of national parks and beach resorts, particularly for honeymoons and weddings.

Another major factor contributing to the growth of domestic tourists travel is a growing middle class with more disposable income who can afford leisure travel. Other factors relate to the increased internet usage, given that most holiday travellers are influenced by digital platforms, mainly social media, search engines, online agents and blogs. Currently, there are numerous firms in the tourism private space leveraging on the online space, targeting social media users through digital campaigns and building their brand

awareness through initiatives such as offering free trips to outstanding Kenyans. They also use influencer and celebrity marketing to increase the visibility of their brands. The local media also have played a big part in promoting domestic tourism in the country.

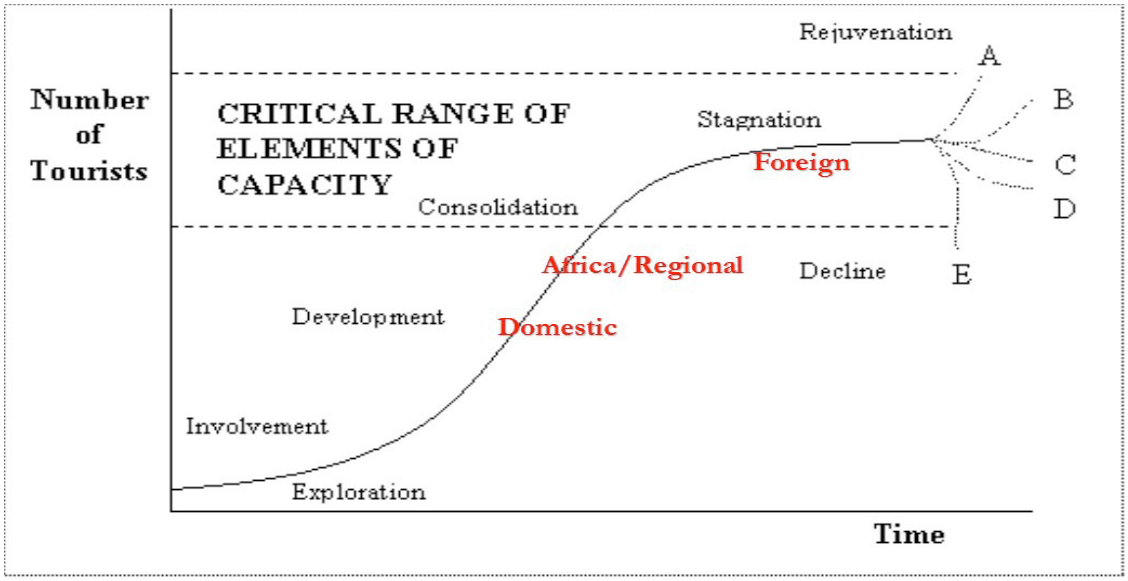
Further, the trend towards travelling for leisure within the country has been aided by the availability of affordable travel packages, cheaper and convenient transport options such as the Madaraka Express. Chartered buses also are used widely to transport domestic tourists across the country. Affordable packages have enabled more Kenyans to travel. During December holiday season, a huge number of Kenyans travel for vacation to the Kenya Coast using the Standard Gauge Railway system from Nairobi to Mombasa. Other domestic tourists prefer travelling in the Cities. Some service providers give offers to stay at top-end hotels at cheaper costs. Further, domestic tourists are increasingly utilizing online booking sites such as Airbnb to stay at villas and apartments with the option to prepare one's own meals. More Kenyans are also opting to travel during off-peak seasons when the rates are lower and recreational facilities are less crowded.

Efforts to promote affordable alternatives to five-star resorts, in addition to marketing national parks as wedding and honeymoon destinations, have already paid off: the country exceeded its domestic tourism target in 2015. These statistics indicate that domestic tourism has a great growth potential and needs to be developed to become an enduring foundation for the tourism industry and the economy as a whole. As the number of international tourists' numbers continue to fluctuate due to various challenges such as COVID-19 in 2020, governments across the world have prioritized the promotion of domestic tourism as a viable sector for sustaining the tourism industry.

1.12 Reasons for Expanding Domestic Tourism in Kenya

While countries often tend to focus on international tourism due to the revenue earned through exports, domestic tourism remains the leading form of tourism, representing a crucial tool for regional economic growth and development (WTTC, 2018). Domestic travel supports and develops local and national economies, provides a rationale for infrastructure upgrading, disperses visitors geographically across regions and to under-visited rural areas, bridges the seasonality gap and creates employment opportunities. As shown in Figure 1.1, domestic tourism is at the development stage and therefore has a lot of potential for growth.

Figure 1: Source Market Life Cycle



Source: Adapted from Butler (1980)

Governments use domestic tourism as a tool to eliminate local poverty, generate employment and economic growth, upgrade infrastructure and alleviate pressure from overcrowding through, for instance, discretionary pricing policies and the provision of non-wage tourism benefits (WTTC, 2018). Domestic tourism can play an important role in improving Kenya's attractiveness, which in turn will promote locals' well-being and helps to attract the educated young professionals upon which high value-added sectors increasingly depend.

1.13 Forms of Domestic Tourism

The types of tourism that are most attractive to the domestic market include a one-day excursion by urban population, urban tourism by rural residents, visiting friends and relatives, sightseeing tourism of natural and cultural kinds, seaside resort tourism, shopping, business and pilgrimage tourism (USAID, 2013). The travel preferences of domestic tourists appear to cover a complete spectrum from traditional sightseeing with lower expenditure to special interest tourism with higher expenditure (Siamak, Adel, & Mohammad, 2018). As incomes increase, the travel preferences of sightseeing destinations tend to shift from historic and cultural areas to natural landscape areas; from traditional national parks to newly developed areas. In addition, special tourism programmes such as eco-tourism, sports tourism, folk tourism, recreation and educational tourism tend to increase, as peoples' income increases (Markowski *et al.*, 2019).

1.14 Potential for Domestic Tourism Growth in Kenya - Middle Class Population

A growing middle class is a sign of a robust economy. Strong domestic tourism is driven by a growing or sizeable middle-class population, an increase in spending power among domestic consumers (WTTC, 2019). With over 50% of the global population now categorised as "middle class" or "rich", more and more people can afford to travel.

Although Kenya's middle class has driven retail and industrial growth in recent years, middle-class purchasing power remains limited compared to Western markets.

The middle class in Kenya consists of people earning more than Ksh.50, 000 per month. People earning between Ksh.50,000 and Ksh.99,999 have been increasing from 2014 to 2017, but reduced slightly in 2018 to 888,162 people (32.1%) as a substantive number moved to the Ksh.100,000 category, which recorded 132,519 (4.8%) people in 2018 (KNBS, 2020), as shown in Table 3. This makes the total number of middle-class people in the country 1,020,681, equivalent to 36.9% of the total employed population in the country (KNBS, 2020).

Table 3: Distribution of Monthly Wage Employment Income (KSh)

Year/Income	0 - 9,999	10,000 - 14,999	15,000 - 19,999	20,000 - 24,999	25,000 - 29,999	30,000 - 49,999	50,000 - 99,999	100,000 +	TOTAL
2014	9,842	27,523	153,213	393,530	319,862	821,454	575,980	68,780	2,370,184
2015	10,606	28,973	170,819	386,940	325,676	873,428	606,966	74,547	2,477,955
2016	17,236	32,127	138,569	270,904	345,721	945,885	703,562	100,316	2,554,320
2017	15,533	33,229	124,488	208,247	382,350	894,720	926,499	114,405	2,699,471
2018*	23,188	23,465	91,673	183,333	329,746	1,093,073	888,162	132,519	2,765,159
% in 2018*	0.8	0.8	3.3	6.6	11.9	39.5	32.1	4.8	100.0

Source: KNBS (2020)

There are a number of people in middle class in all sectors of the economy in the country. 32.5% are in education, 12.5% in manufacturing and 10% in wholesale and retail activities. The total number of people under the middle-class category in the country in 2017 was 1,040,904 people (KNBS, 2020), as shown in Table 4. These are potential domestic tourists that the country's tourism industry could attract.

Table 4: Distribution of Monthly Wage Employment Income (2017) (KSh) by sector

INDUSTRY	0 - 100,000+	50,000 – 99,999	100,000 +	50,000 +	Percentage per sector 50,000 +
Education	559617	282385	56221	338606	32.5
Manufacturing	303378	124458	6034	130492	12.5
Wholesale & Retail Trade	250758	93506	10504	104010	10.0
Security & Defense	292594	91552	6831	98383	9.5
Agriculture, Forestry & Fishing	332105	53516	3263	56779	5.5
Financial & Insurance	74712	44504	7466	51970	5.0
Construction	167910	43845	4840	48685	4.7
Others	718400	192734	19249	211983	20.3
Grand Total	**2,699,471**	**926,499**	**114,405**	**1,040,904**	**100**

Source: KNBS (2020)

Table 5 shows a list of factors that hinder Kenyans from getting involved in domestic travel.

Table 5: Hindrances to domestic tourism in Kenya

1.	Lack of knowledge by the locals
2.	Negative perceptions that tourist destinations are for the rich and foreign
3.	Lack of own transport
4.	Less hospitable treatments to local tourists by service providers
5.	Unfamiliar food types in hotels
6.	Marketing that does not resonate with local people
7.	Lack of disposable income and free time

2. Strategies to Raise the Contribution of Domestic Tourism

A strong domestic travel and tourism sector can help a country withstand shocks and demand fluctuations that may arise when crises affect external source markets. To incentivise domestic travel, certain governments and local authorities have intervened in the provision of local tourism services (WTTC, 2018). There is also a need to develop a participative and integrated domestic tourism strategy to enable the industry to tap into this potential market in a sustainable and competitive manner. For domestic tourism to be successful the key factors that form opportunities for promoting this sector include:

2.1 Tourism Marketing and Promotion Campaigns

The underlying intention of a successful tourism business recovery programme is not merely restoring or getting back to where things were before the crisis but to build back better (Beirman, 2016). This is designed to result in a more marketable domestic destination and business and to improve infrastructure. Tourism marketing involves finding out what tourists want through marketing research and developing suitable offerings by developing products, doing promotions and providing information as to where they can buy the offerings that they need, in turn receiving value (Basera, 2018).

There is a need for a broader mass-based domestic campaign that targets all, regardless of gender, age or race, and this will require more partnerships and cooperative marketing (National Tourism Sector Strategy, 2011). Although general tourism awareness will assist in developing the domestic tourism market, domestic tourism development requires attention to; product improvement, broader marketing, distribution, information provision and possible social tourism programmes (OECD, 2020). Marketing should be stepped up to improve awareness and access to information as well as the development of new and customised products that meet the needs and requirements of particular market segment (Tsiotsou & Goldsmith, 2012).

Tourism marketing will help create awareness, thereby sensitizing domestic tourists of the products being offered thus stimulating locals to want to travel and visit places. Tools that can be used to market tourism to the local population include advertising, the print media (newspapers, brochures) and electronic media (television and radio) as well as the internet (Kihima, 2015). There is need to create a special funds to help attract

international conferences and events, organize local events and support recovery in less resilient destinations. This is especially relevant for destinations that are more dependent on tourism and for communities in rural areas (UNWTO, 2020).

Destinations should also support companies by reducing or waiving fees to participate in travel fairs and shows, other events and marketing activities. Invest in digital marketing to ensure targeted actions and enhanced return on investment and embrace the use of market segmentation marketing strategy as it provides basis for precise customer-focused and targeted marketing to those potential customers who are most likely to be persuaded to visit (Camilleri, 2018). Lastly, encourage tourism marketing organizations and businesses to constantly update their websites with current information. This is because, domestic tourists who can afford to travel to destinations do not travel as they are not well informed about the pleasurable tourists' activities that they may enjoy.

2.2 Infrastructure Development and Betterment

Quality transport infrastructure enhances the experience of a destination and quality of life within it for both visitors and residents. Transport systems, particularly tramways and funiculars, have catalysed regeneration in cities, such as London, as well as being the gateway and central hub for international visitors (WTTC, 2018). It is important for destinations to maintain their plans for new and improved infrastructure as this provides the basis for the future expansion of tourism and demonstrates public sector commitment to tourism.

This will also provide confidence to domestic tourist markets, local travel trades and prospective investors both in tourism and other economic sectors. This will also enhance accessibility to many places even the remote areas thus the local people can move from the destination origin to new places for tourism and leisure (Kanwal *et al.*, 2020). For instance, China has built an average of eight new airports every year since 2013, and rapidly developed its high-speed rail network over the last 15 years which has opened-up previously remote places to domestic tourists (WTTC, 2018).

2.3 Diversification of the Tourism Products and Markets

Product diversification integrated with market diversification can be more readily exploited to reduce reliance on a narrow range of tourism products and services (Benur, 2013). The wildlife visits, beach bathing and game parks have been the major tourism activities from 1989 thus new services and products have to be innovated so as to trigger again the desire of the local people to travel to those areas.

Destinations can develop new products according to the available resources and in line with market trends and promote more of adventure, sport, ecotourism, heritage and cultural tourism activities (Paris & Efthimia, 2017). This should be done in Kenya so as to shift the focus away from the safari tours in favour of more regional promotion, in order to send a clear message that Kenya has a more diversified product to offer besides safari, sun and sea and beach products. Also, there is need to focus on the identification

and prioritization of preferred local destination and attractions for the domestic market (Ndlovu, 2010).

2.4 Strong Partnerships and Collaboration

Creating strong partnership and strong collaborative initiatives among all the tourism and non-tourism stakeholders is very crucial during the recovery phase. For most countries, domestic tourism contributes over 60 percent of the Gross Domestic income. To achieve this, the industry receives a lot of support from national tourism boards and local tourism councils. With reduced international visitors streaming in, the stakeholders need to redirect their efforts towards promoting local tourism (Standard Media Group, 2008).

Collaboration, specifically through multi-stakeholder partnerships, has been seen as an effective way to support initiatives in tourism development (Sonya, 2016). As tourism recovers from the COVID-19 pandemic, tourism stakeholders should work together to ensure the sector benefits from support available from international and regional organizations such as the IMF, the World Bank, the Regional Banks and the European Commission (UNWTO, 2020).

2.5 Image Rebuilding and Destination Repositioning

A crisis event presents an opportunity to upgrade and re-image tourism destinations completely through re-theme advertising and promotion (Beirman, 2016). There is a need to address market perception of the destination through image management, and in some cases to reposition the destination in the public mind (Abdellatif, Ksouri, & Storai, 2014). Rebuilding trust can encourage a return to higher business levels. Methods can include articles written after familiarisation trips arranged for journalists and bloggers showing in real-time that the area is safe and pleasant to visit (Beirman, 2016).

Marketing focused on futures and benefits to domestic tourists is crucial and it should highlight features and benefits of domestic tourism which may have previously been ignored or under-promoted (Canavan, 2013)**.** There also should be value added products to domestic tourism packages with free added products for consumers such as bonus meals, sightseeing, and entry to attractions. A thank you, gift or recognition for the visit and a special welcome with a hospitality touch is very important (Beirman, 2016).

2.6 Review Taxes, Charges, Levies and Regulations Impacting Transport and Tourism

The government should review all taxes, charges and levies impacting on tourism, transport and related activities. It should also provide temporary suspension or reduction of travel and tourism taxes, charges and levies, including VAT and income taxes as well as of specific tourism and transport charges in a fair, non-discriminatory and transparent manner (UNWTO, 2020). The government should also provide temporary suspension or reduction of travel and tourism taxes, charges and levies, including VAT and income taxes as well as of specific tourism and transport charges in a fair, non-discriminatory

and transparent manner. This will help operators adjust or halt their operations, including by reducing the necessary administrative formalities (UNWTO, 2020).

2.7 Ensure Consumer Protection and Confidence

In relation to COVID-19 pandemic, the government needs to work with the private sector to promote fair arrangements for consumers. These can include the rescheduling of cancelled holidays and flight tickets and ensuring consumer are fully protected and where possible, alternative mechanisms for settling consumer disputes should be used so as to keep lawsuits to a minimum (UNWTO, 2020). The tourism businesses should consider providing vouchers for cancelled bookings valid until the end of 2020 in order to boost demand and support consumers.

They should also encourage locals to participate in tourism by coming up with low priced packages for the locals. This can be done by urging players in the tourism industry to come up with packages affordable to locals in order to stimulate demand as well as offer promotions in terms of group discounts, special packages, and incentives involving domestic tourists (Kwoba, 2018). Consideration should be put in place in order to ensure value for money and affordability of the current offerings to current and prospective domestic tourists.

2.8 Campaigns to Encourage Domestic Tourism

Encouraging domestic tourism in times of economic downturn and during the aftermath of a crisis can also be an important means of filling the void left by international tourists. This is because domestic tourists are more likely to be fully aware of the real situation than those outside the country (Beirman, 2016). Massive campaigns should also be conducted with a view of educating and familiarising the locals about new features added to the tourism industry and the importance of tourism. This will create a desire in the locals to visit those places with most fascinating features as depicted in the campaigns (USAID, 2013).

2.9 Pricing Initiatives

Dual pricing with different pricing for international and local/domestic tourists, and/or lower prices in off-season months could expand domestic tourism. For example tourist sites such as Taj Mahal in India, Acropolis in Greece, Sigiriya in Sri Lanka, and national parks in Kenya have such strategies in place. By imposing a lower fee for domestic tourists and/or charging less in off-season months, authorities make tourism services more widely accessible to different social classes across the countries, create all year-round tourism and can help to alleviate pressure from over-crowding (WTTC, 2018). There should also be reduced tax on domestic tourism activities so as to increase the number of visits. In conclusion, the country will need to navigate some significant challenges if it is to fully realise its true domestic tourism potential; for instance, by addressing the burden posed by the relatively high cost of traditional safari holidays in the country.

2.10 Provide Direct Incentives

Resource to support domestic tourism can be given to organisations that will develop products and services that will suit the local tourist market, or in some cases, directly to the residents themselves. For example in Hungary, the government introduced a benefit programme to direct spending towards tourism services and incentivise domestic travel. It encourages employers to provide various non-wage benefits to employees which include a programme for holiday and recreation activities (WTTC, 2018).

2.11 Provide Financial Stimulus for Tourism Investment and Operations

The government needs to create special incentives to support Micro, Small and Medium Enterprises (MSMEs') short-term business operations and recovery such as incentives for digital transformation, market access, training and hiring (UNWTO, 2020). It should develop investment mechanisms that incorporate incentives for field projects such as depreciation deductions for hotels, subsidized local credits for remodelling, expansion or energy efficiency projects that improve competitiveness. It should promote funds to incentivize the integration and disruption of supply chain stakeholders, especially the strengthening of MSMEs and digital travel tech start-ups as well as consider offering extra incentives for foreign direct investment in tourism.

2.12 Enable Leisure Policies

The activities of the citizens' free time must be planned and, wherever possible, executed collectively. For instance, within China, traditional culture requires individuals to save and be thrifty, so that they may travel. Travel is, therefore, highly respected by the Chinese, largely because of the social, cultural and spiritual development that is gained by their culture (Breda, 2008). In China, the domestic tourism market has also been helped by the government's decision, in the early 1990s, to implement a nation-wide holiday system stipulating that each employee would be granted an annual leave and prolonged festivals holidays.

This policy resulted in the stimulation of local initiatives, including encouraging the private sector, in building domestic tourism infrastructure. Major improvements were done in domestic tourism supply: accommodation, food and beverage, transportation, communication, sightseeing, entertainment and shopping. All these improvements have played important roles in the nation's economy, and they are also a direct and important cause for the growth of domestic tourism (Breda, 2008). Table 6 shows the Domestic tourism growth Strategies for Kenya implementation matrix.

Table 6: Domestic tourism growth Strategies for Kenya implementation matrix

Domestic tourism growth Strategies		Implementation	Responsibility
Marketing strategies for promoting domestic tourism			
1.	Rebuild trust after COVID-19 crisis	Articles written after familiarization trips arranged for journalists and bloggers showing in real-time that the area is safe and pleasant to visit	• MoTW • KTB • TRA
2.	Target Growing Middle Class	A growing middle class is a sign of a robust economy. Strong domestic tourism is driven by a growing or sizeable middle-class population, an increase in spending power among domestic consumers, and governments' initiatives in promoting new locations, and strong or improving transportation infrastructure and economic links between different internal regions (WTTC, 2019). With over 50% of the global population now categorized as "middle class" or "rich", more and more people can afford to travel. In Kenya, the total number of middle-class is 1,020,681, equivalent to 36.9% of the total employed population in the country.	• MoTW • Private Sector
3.	Greater focus on the local domestic tourism market - make domestic travel attractive and create a holiday culture amongst all Kenyans	• Repackage tourism product with local market interests and air adverts on local media to change attitude towards travel and tourism • Promote a set of experiences that a majority Kenyans could relate to by tailor making the experiences according to different market segments - the different experiences included City Breaks, Coastal Getaways, Mountain Escapes, Cultural Discoveries, Countryside travels, Bush Retreats and Event Wonders. • Re-ignite marketing campaigns for the domestic tourism industry, re-launching the #TembeaKenya, #MagicalKenya and #Twende Tujivinjari hashtags to encourage Kenyans to explore their own country	• MoTW • KTB • Private Sector
4.	Destination marketing and image building - create awareness, thereby sensitizing domestic tourists of the products being offered thus stimulating them to want to travel and visit places	• Create world-class destination brands for domestic market • Marketing campaigns targeted at domestic tourists through TV, Radio, Internet, Print media, Social media, word of mouth etc Campaigns • Create group discounts, special packages, incentives and competition involving domestic tourists, , travel expos and road shows	• MoTW • KTB • Private Sector

		• Value added products to domestic tourism packages with free added products for consumers such as bonus meals, sightseeing, and entry to attractions	
5.	Support companies to participate in travel fairs and shows, other events and marketing activities	• Reducing or waiving fees • Encourages employers to provide various non-wage benefits to employees which include a programme for holiday and recreation activities	• KTB • Private Sector • KNCB
6.	Provide precise customer-focused and targeted products and marketing to potential customers to identify the different needs and wants of the different domestic travelers.	Market segmentation and targeting within domestic market based on the different consumer beliefs and values	• KTB • Private Sector • TRI • Academia
7.	Promote repeat visits by the domestic tourists to destinations previously visited	Customer relationship management and loyalty or reward programmes for frequent domestic travelers e.g. • A special welcome with a hospitality touch • A thank you, gift or recognition for the visit	• KTB • Private Sector
8.	Improve the knowledge of the domestic market and understand consumer attitudes, their motivations and the barriers to involvement in domestic tourism in Kenya	Conducted market intelligence	• TRI • Academia
9.	Invest in digital marketing - provision of accessible information and ease of purchase to improve awareness on accessibility, attractions, amenities, Activities etc.	• Creation of an Integrated Tourism Management System that is georeferenced • Facilitate linkages and product packaging to convert interest into action	• TRI • KTB • Private Sector • Academia
10.	Dedicate more research focused on high potential markets for domestic tourism growth, effectiveness of promotion strategies, acceptability of products etc.	Put in place a monitoring, evaluation and reporting mechanism in place to track the performance of the sector	• TRI • Academia
Socio-Economic Strategies			
11.	Growing economic health, increased disposal income and growth of the middle classes	Target middle class (1.02 million people)	• National Government
12.	Provision of tourist facilities suitable for domestic tourists	Increase and quantify number of affordable accommodation facilities	• Private Sector • County Governments
13.	Create strong desire to travel	Documentaries on destinations and capture experiences	• KTB • County Governments
14.	Offering sponsored holidays for best employees to destinations	Create incentive travels to destinations countrywide	• Private Sector • KTB
15.	Tier pricing system that differentiates prices paid by	Revise pricing in rated hotels and premier parks for the domestic market	• Private Sector • KWS • KTB

	locals and that paid by international tourists		• TRI • Academia
16.	Providing more affordable and accessible tourism experiences for the domestic traveler	Design weekend and public holidays packages and discounted packages	• Private Sector • KTB
17.	High quality tourism experience	Increase value for money for the domestic market	• Private Sector •
18.	Sporting events, mega arts, cultural events and religion -based events can easily be used to spur domestic tourism	Package and advertise relevant events countrywide	• KTB • KNCB • Private Sector • TRI • Academia
19.	Improve residents' perceptions of local holiday making	Campaigns to impress the importance of travel and tourism to the individual, country's economy, conservation etc.	• KTB • Private Sector • TRI • Academia
Improved transport infrastructure			
20.	Improvements in mobility - improved road network and development of inexpensive mass transport.	• Increase SGR trips • Organized road transport to events and attractions • Share with potential tourist the process of access to tourism transportation	• National Government • MoTW • KTB • Private Sector
21.	Reliable, accessible and affordable transportation for access to the destinations	• Provision of KWS buses to all conservation areas • Creation of awareness on relevant schedules • Development of circuits with specific itineraries	• KWS • KTB • Private Sector
22.	Increased urbanization and ownership of cars by many families	Promote day excursions to urban populations	• National Government • KTB
23.	New and improved infrastructure as this provides the basis for the future expansion of tourism	Plans to open up new destinations e.g. Northern Kenya	• National Government • MoTW
24.	Provision of low- fare airlines - these are significant for the development of weekend, city or short-break tourism. They can radically expand potential destinations as well as "visiting friends and relatives" market	• Construction of airstrips • Creation of awareness on available choices and schedules • Gradual increase of options • Revision of policy on chartered flights to increase availability	• National Government • MoTW
Strong stakeholder partnerships			
25.	Partner with local tour operators and hotels in creating and promoting accessible tours	• Campaigns to urge tour operators and hotels to reduce rates for domestic tourists • Create affordable and discounted packages	• KTB • Private Sector
26.	Strong partnership and strong collaborative initiatives among all the tourism and non-tourism stakeholders	Optimize the resources between private and public stakeholders in relation to marketing tools, collaterals and skills in order to create synergy	• National Government • MoTW • Private Sector • TRI • Academia
27.	Partnership between the national government and the County government in	Promotion of domestic tourism across counties	• National Government

	promotion of domestic tourism		• County Governments MoTW
Improvement and diversification of the Tourism Products			
28.	Major improvements in domestic tourism supply	• Build domestic tourism infrastructure • Investment in renovation of accommodation, food and beverage, transportation, communication, sightseeing, entertainment and shopping	• Private Sector • National Government • County Governments • MoTW
29.	Product diversification - Development of new and customized products that meet the needs and requirements of the domestic market segment	Diversification of packages from wildlife visits, beach bathing and game parks to adventure, sport, ecotourism, heritage and cultural tourism activities	• Private Sector • KTB • KWS
30.	Research on domestic market preferences	Identification and prioritization of preferred local destination and attractions for the domestic market	• TRI • Academia •
Policies for promoting domestic tourism			
31.	The activities of the citizens' free time should be planned and, wherever possible, executed collectively - Better employment benefits including flexible working hours, leave travel concessions and lower government restrictions on internal population	Propose one week national-wide holiday for all working population during August and December school holidays (prolonged festivals holidays)	• National Government • MoTW
32.	Central role of national and county governments as a partner or stakeholder in expanding the tourism sector and achieving the desired outcomes of national tourism policy on domestic tourism	Prepare and launch a tourism planning toolkit for national and county governments domestic tourism development and growth programmes	• National Government • County Governments • MoTW
33.	Prioritize tourism policy formulation to allow for strategic development of the domestic tourism	Revise tourism policy, strategic plan, Act, blue print, etc. to address new perspectives of domestic tourism	• MoTW
34.	The government needs to work with the private sector to promote fair arrangements for consumers after a crisis	• Rescheduling of cancelled holidays and flight tickets and ensuring consumer are fully protected and where possible, alternative mechanisms for settling consumer disputes should be used so as to keep lawsuits to a minimum • Provide vouchers for cancelled bookings	• National Government • MoTW • Private Sector
35.	Government to facilitate quicker recovery after a crisis	• Review all taxes, charges and levies impacting on tourism, transport and related activities. • Create special incentives to support Micro, Small and Medium Enterprises (*MSMEs'*) short-term business operations and recovery	• National Government • MoTW • TFC

36.	Formulation of sector reopening protocols	• Formulation, publicizing, and implementation of reopening protocols	• MoTW • TRA • Private Sector

3. Conclusion

Domestic tourism as an industry has for a long time been a spontaneous phenomenon and many governments have come to recognize its significant contribution in their national economies. Though domestic tourism has taken a strong foundation in the developed world, many developing countries are yet to reap the benefits associated with investing in the industry. A vibrant Domestic Tourism can cushion the industry from fluctuations in international tourist arrivals and contribute to the industry's overall sustainability.

According to the Bloomberg Terminal Research (2017), domestic tourism has been gaining momentum with the Kenya Tourism Board (KTB) launching marketing campaigns aimed at attracting Kenyans to take up domestic tourism. They state further that while Kenyans have limited purchasing power, campaigns urging tour operators and hotels to reduce rates for the domestic traveller to encourage them to take up holidays during low season are paying off. Despite the fact that Kenyans have smaller holiday budgets than their international tourists' counterparts, the popularity of national parks and beach resorts to the domestic market is on the rise, particularly for honeymoons and weddings.

There is need for the government of Kenya to tap into this lucrative market as domestic travel supports and develops local and national economies, provides a rationale for infrastructure upgrading, disperses visitors geographically across regions and to less visited rural areas, bridges the seasonality gap and creates employment opportunities. The Ministry of Tourism and Wildlife needs to tap more into the growing middle class population. The growth of middle class with increased disposal income, flexible working hours facilitated by greater auto-mobility and increased spending power have been the key driver for the growth of domestic tourism.

In order for the Ministry of Tourism and Wildlife and the entire tourism industry to effectively strengthen the domestic tourism in Kenya there is a need for a comprehensive enabling environment. Consideration is needed on the following strategies; more marketing and promotion campaigns; Infrastructure development and betterment; Diversification of the tourism products and markets; strong partnerships and collaboration; image re-building and destination repositioning; review of taxes, charges, levies and regulations impacting transport and tourism; ensuring that consumer protection and confidence; putting in place campaigns to encourage domestic tourism; providing financial stimulus for tourism investment and operations; and putting in place leisure policies.

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Appendices

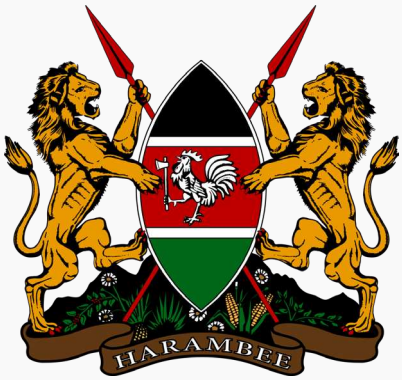
Appendix 1: Importance of promoting domestic tourism

Table A.1: Importance of Promoting Domestic Tourism

S/No.	Specific impact
Economic impact	
1.	A socio-cultural and economic significance that contributes to the national and local economic development and ripple effects on the growth of the economy
2.	Deeper linkages since the domestic tourists tend to purchase local goods and services unlike the international tourists who will only focus on "tourist category products"
3.	Promotes small-scale enterprises and the informal sector
4.	Development of new tourism products, attractions and experiences including urban and shopping tourism and
5.	National pride as a result of exposing the country's cultural and natural resources to the people
6.	Creates national integration, cohesion and pride
7.	More sustainable path for tourism development and brings stability
8.	Does not require huge investments and at times thrives without external control and investments
9.	Avoids outflows of profits
10.	While the locals may lack the necessary skills and resources to cater for high-end international tourism, domestic tourism provides a platform for the locals to cater for the needs of their fellow countrymen
Job creation	
1.	It protects the incomes and employment of tourism product providers during the off-peak season and improved living standards of the host community
2.	Tourism being labour intensive, jobs are created through both informal sectors such as the sale of various merchandises and formal sectors through employment in various tourism establishments and other sectors
3.	Creates opportunities for self-employment reducing unemployment rates
4.	It bridges the seasonality gap and therefore creates jobs and stability in the employment sector
5.	Acts as a basis for a stronger international tourism
6.	Domestic tourism can also help non-five-star hotels and restaurants in the country secure steady business
7.	Creates stability
8.	Not vulnerable to fluctuations in numbers caused by seasonality or problems arising from travel booking system, international airline schedules, changing international tastes, perceived security threats or world economic recession
Linkages in the tourism value chain	
9.	Domestic tourism promotes linkages with local industries, for example, demand for agricultural produce to supply tourism destinations
10.	Encourage investment in infrastructure development
11.	Domestic tourists more often than not, consume local products as they are familiar with
12.	Promotes informal sector and small & medium-sized enterprises which are predominantly owned and run by local people
13.	Lead to regional development
14.	Plays a significant role in maintaining and improving regional and local infrastructure
15.	Create a greater understanding and affinity among local people for the value and requirements of the foreign tourism market, thereby elevating the value and service levels in tourism



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