REPUBLIC OF KENYA

MINISTRY OF TOURISM AND WILDLIFE



RESEARCH REPORT ON

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

Recovery Strategies **in Brief**



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COVID – 19 AND TOURISM IN KENYA: RECOVERY STRATEGIES

Immediate Recovery Strategies (Before travel re-opens)

Strategy	Activities and Output	Responsibility - Lead
Preparation and implementation of tourism industry protocols	• Work with industry, Government and Health Experts to design new and joint protocols and guidelines to support tourism recovery. Proposed **protocols** are: Hospitality, outdoors retails; aviation; airports; cruise; tour operators and travel agents; Convention Centers & MICE etc. • Align the private sector behind common standards to ensure the safety of its workforce and travelers. • Devise strict hygiene policies as well as new and innovative ways.	• MoTW • MoH • TRA • Private Sector • Resilience Centre
Re-build and promote Kenya as COVID-19 Tourism Resilient Zone	• Lift travel restrictions when the Ministry of Health allows it. • Implementation of protocols. • Surveillance and detection of infections related to travel and tourism. • Infection prevention and control. • Risk communication and community engagement. • Management of cases in travel and tourism, including importation, transportation, quarantine and treatment of cases. • Support the health systems. • Provision of scientific evidence to responses. • Creation of awareness on the efforts made to guarantee a resilient destination. • Continuous assessment of any travel restrictions introduced in response to the COVID-19 pandemic.	• MoTW • MoH • KTB • TRA
Training of industry on new requirements and protocols	• Mass sensitization to influence behavior change. • Up-skilling/reskilling: – Hygiene. – Safety and security. – Maintenance of Resilience zones. – Service delivery in travel and tourism. – Tourists behavior etc.	• MoTW • MoH • TRI • KUC • Academia • Resilience Centre
Knowledge and Experiences Capturing	Collect and packaging tourism products as text, audio, videos, images, graphics, etc.	• MoTW • KTB • TRI • Academia
Interpretation of the tourism product	• Interpretation of products in website, social media, emails, narratives at the attractions, billboards, disks; onsite and offsite. • Knowledge sharing.	• MoTW • KTB • TRI • Academia
Packaging tourism information and experiences	• Provide modified and new packages. • Creation of itineraries according to source market, income, age, etc. • Develop competitive airline, cruise, train, road etc. packages.	• MoTW • KTB • Academia

Strategy	Activities and Output	Responsibility - Lead
Digitizing Travel and Tourism	Use ICT to: • Capture knowledge and experiences. • Interpretation of the tourism product. • Undertake digitized mapping of tourism resources in Kenya. • Information provision and geospatial packaging of tourism resources in Kenya. • Develop a strategic digital marketing platform for Kenya's tourism. • Develop systems to fight against false information in the tourism industry in Kenya. • CCTV and drones for live streaming. • Use of imagery and remote sensing. • Creation of virtual tours digital mapping and Apps creation. • Digital protocols. • Field Operations (workforce management, survey, navigation etc).	• MoTW • TRI • TRA
Digital marketing	• Encourage tourists to stay home and travel tomorrow. • Consumer reassurances that the destination is doing all it takes to create a safe destination through communication. • Assure customers of hygienic, clean, safe and secure environment for their stay. • Ensure provision of accessible, reliable and up-to date information on travel restrictions. • Virtual tourism marketing. • Maintain continuous online visibility. • Fight against the Spread of Disinformation.	• MoTW • KTB • Private Sector
Intensify research activities	• Classify and establish strong market segments. • Market preferences. • Price revisions. • Supply side dynamics. • Resilience creation. • Research on domestic, regional and international market preferences to understand customers' requirements, preferences, and emerging tastes brought about by shift in purchasing behavior.	• TRI • Resilience Centre • Academia
Ensure consumer protection and confidence	• Make timely-modifications to existing tourism policies such as flexi-cancellation policies and flexi-rates for all services. • Re-scheduling of cancelled holidays and flight tickets e.g. provision of vouchers for cancelled bookings. • Offer special discounted rates to bookings affected by the COVID-19 pandemic.	• MoTW • Private sector
Prepare a re-launch plan	• Evaluate the current position and develop a re-launch plan at a destination and institutional level. • Readiness to re-launch when time is right. • Strengthened partnerships. • Prepare and launch a tourism planning toolkit for national and county governments' tourism development and growth programmes. • Organize continental tourism experts' forums to deliberate on tourism recovery strategies for Africa.	• MoTW • Private Sector

Medium Term Recovery Strategies – (Six months after travel re-opens)		
Strategy	**Activities and Output**	**Responsibility - Lead**
Staggered re-opening approach i.e. i. Community tourism phase ii. Domestic tourism phase iii. Regional tourism phase iv. International tourism phase	• Restore confidence among consumers to restart travel as soon as the health emergency allows for it. • Reignite demand and tap the existing market. • Encourage increased length of stay. • Rebuild the national economy.	• MoTW • KTB • Private Sector
Financial Strategies and Partnerships	• Provision of financial stimulus for tourism investments and operations: - Government has set aside Ksh.500 million (USD 4.7 million) to help the tourism sector recover from the COVID-19 outbreak. - Provision of soft loans to hotels and related establishments through the Tourism Finance Corporation (TFC); Ksh.2 billion will be set aside to support renovation of facilities and the restructuring of business operations. - Some stimulus funds will be used to support the operations of Utalii College. - Ksh.1 billion stimulus package will engage 5,500 community scouts under the Kenya Wildlife Service - Ksh.1 billion will support 160 community conservancies. • Review taxes and charges touching on the tourism industry businesses. • Temporary exceptions or reduction of taxes, charges and levies. • Interest-free loans, interest moratoriums on existing loans, and subsidies for tourism businesses. • Provision of Non-refundable grants and subsidized and flexible credit loans. • Provision of low interest loans with prolonged repayment periods. • Development of ***business resilience fund*** to provide interest free loans to tourism businesses affected by COVID-19 outbreak. • Allocation of emergency funds and programmes. • Provision of recovery stimulus package to restore destination confidence. • Support the most affected companies so that they can restart operations. • Create special incentives to support Micro, Small and Medium-sized Enterprises (MSMEs') short-term business operations and recovery. • Incentives for digital transformation, market access, training and hiring. • ***Aviation Sector:*** Provide necessary financial and policy support to passengers and freight carriers to compensate for decreased revenues and liquidity. • Increased investment opportunities in the tourism sector.	• National government • County Governments • MoTW • Private Sector • TF • TFC • KWS

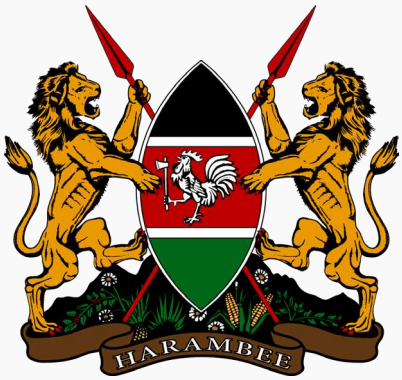
Strategy	Activities and Output	Responsibility - Lead
Product improvement and diversification strategy	• Take advantage of the previously untapped natural resources. • Introduce new man-made attractions in different areas. • Regulate the operations and investments in the area to ensure proper planning and sustainability of the product. • Identification and promotion of community-based tourism. • Expand to new segments of existing markets and venture to new markets. • Repackage tourism product with local market interests and air adverts on local media to change attitude towards travel and tourism. • Knowledge capturing and packaging	• MoTW • KTB • TRI • KWS • Academia • Private sector
Digitizing the travel and tourism industry	• Geospatial presentation of Tourism resources in Kenya. • Digital marketing. • Digitization of tourism activities in Kenya through creation of more virtual tours/safaris. • Introduction of e-commerce in tourism transactions.	• MoTW • KTB • TRI • Academia
Communication and marketing recovery strategies	• Invest in digital marketing. • Increase marketing to the existing markets. • Ensure targeted actions and enhanced return on investment. • Identify and promote new and improved product and link to the market. • Boost consumer confidence through marketing and provision of incentives in order to hasten recovery.	• MoTW • KTB • Private sector
Pricing revision for Tourism Products in Kenya	• Measuring of Willingness to accept compensation (WTA) and Willingness to pay (WTP) through contingent valuation, experimental auction, conjoint analysis etc.	• MoTW • KWS • County Governments • TRI • Academia • Private sector
Domestic tourism growth	• Put in place marketing activities and incentives that will facilitate domestic travel. • Heightened tourism marketing activities to Kenyans through TV, Radio, Internet, Print media, Social media. • Target Growing Middle Class - 1,020,681 (36.9%) of employed workforce. • Propose one week national-wide holiday for all working population during August and December school holidays and Holidays as non-wage benefits. • Repackage tourism product with local market interests. This can start at the counties' level up to the national level. • Make domestic travel more attractive through campaigns. • Provision of accessible information and ease of purchase. • Organized road transport to events and attractions. • Development of circuits with specific itineraries. • Encourage local spending. • Encourage more Kenyans to travel for business and leisure purposes within the country. • Make domestic market economically viable for the private sector. • Optimum pricing of the tourism products for the domestic market. • The industry to encourage the frontline employees to travel first to kick-start the domestic offering. • Develop a package to use nature trail day long with a distancing plan. • Target leisure travelers first as they will have the urge and desire to travel following government restrictions to movement. • Sensitize the domestic market on the health benefits of relaxation and rest to stimulate travelling for leisure and recreation. • Intensify research to establish the needs of the domestic market. • Rally call for domestic tourism through 'Know your county and country' campaigns.	• MoTW • County Governments • KTB • KWS • Private Sector

Strategy	Activities and Output	Responsibility - Lead
Regional tourism growth	• Harmonize the timelines (when to re-open borders) and procedures for border re-openings including quarantine and requirements to protect the health and safety of travelers and citizens. • Lay a strong emphasis on regional tourism in Eastern Africa and Africa in general and develop joint marketing strategies. • Joint packaging of thematic multi-country tour products. • Promote intra-regional travel through reduction of the fare, by reducing taxes. • Discounts to EAC citizens and have preferential rates for the regional markets for tourist attractions and accommodation facilities in Africa. • Strengthened partnerships especially for private sector stakeholders i.e. airlines, tour operators, travel agencies and accommodation facilities in the region. • Full implementation of the Single African Air Transport Market. • Increase efforts to develop diversified tourism products the regional tourist markets. • Allow travelers to switch towards more reputed, trust worthy and low- cost alternatives. • Implement Open Skies policies in the region. • Enhance partnerships with our neighbors (East Africa Community) and the whole Africa.	• National government • MoTW • KTB
Boosting consumer confidence	• Enhance quality service delivery by ensuring compliance with the set standards and protocols. • Revise pricing for different market segments. • Arrangements for customers after the crisis by rescheduling cancelled holidays and flight tickets and ensuring tourists are fully protected. • Develop mechanisms for settling disputes and promote fair complaint management for customers. • Develop a special video clip advert showcasing the major steps followed when delivering services to visitors (domestic and international) at the entry and exit points to protect them from COVID-19 infection. • Provision of clear cut details of transportation to designated hospitals to cater to the needs of any victim of COVID-19.	• MoTW • TRA • KTB • Private sector



Long-term Strategies (Beyond six months after travel re-opens)		
Strategy	**Activities and Output**	**Responsibility - Lead**
Create resilience in the industry	• Gain better understanding of the consumer response to disastrous events. • Coordinated response to crises along the value chain. • Develop risk and crisis communication plans. • Develop and implement risk and crisis training packages. • Engage tourism businesses on crisis preparedness and disaster-management. • Enhance the employees' confidence by training on restoring business and developing employee motivational strategy guide.	• MoTW • Resilience Centre • TRI • Academia
Sustain marketing strategies	• Creation of an Integrated Destination Management System for the industry. • Encourage domestic/inter-county tourism by developing affordable tourism packages that cuts across. • Community level engagement through mobilization, organizing public relations forums, aggressive marketing campaigns, and enlightening locals on visiting the touristic sites. • Sustain Regional marketing. • Carry out Aggressive international marketing. • Work on local and international MICE market.	• MoTW • KTB • KNCB • Private sector
Encourage international tourists to visit Kenya - Re-launch the destination	• Aggressive marketing in potential markets internationally. • Simplification of visa rules. • Reducing or waiving travelers' taxes. • Promotion and marketing to attract tourists. • Revise hotel rates slightly downwards. • Arrange familiarization trips for local and international travel intermediaries, journalists and bloggers showing in real-time that the area is safe and pleasant to visit. • Maintain and expand international markets. • Hasten the visa and passport application process and engaging more on bilateral agreements. • Increased international travelers.	• Immigration Services Department • MoTW • KTB • Private sector
Partnership among stakeholders from all the sectors	• Partner to agree on the way forward on the management of the pandemic shocks. • Open and efficient communication channels between key stakeholders. • Sufficient internal and external motivational synergies. • Mutual benefit between employees and businesses. • Engagement in consumer related activities. • Reduce transport barriers by working with transport providers. • Partner to diversify tourism product. • National government and county governments' integration to communicate the same message to the consumer.	• MoTW • County Governments • Private sector

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