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



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

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www.tourism.go.ke



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.



MR. JOSEPH KIPCHIRCHIR BOINNET, MGH
CHIEF ADMINISTRATIVE SECRETARY (CAS)
MINISTRY OF TOURISM AND WILDLIFE

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LIST OF ABBREVIATIONS AND ACRONYMS

ACI	Airport Council International
AHIF	Africa Hotel Investment Forum
CBK	Central Bank of Kenya
CEO	Chief Executive Office
CVB	Convention & Visitors Bureau's
EMAK	Events Managers Association of Kenya
GDP	Gross Domestic Product
GoK	Government of Kenya
IATA	International Air Transport Association
ICCA	International Congress and Convention Association's
IHR	International Health Regulations
ILO	International Labor Organization
IMF	International Monetary Fund
KAA	Kenya Airports Authority
KAAO	Kenya Association of Air Operators
KAHC	Kenya Association of Hotelkeepers and Caterers
KATA	Kenya Association of Travel Agents
KATO	Kenya Association of Tour Operators
KAWT	Kenya Association of Women in Tourism
KCTA	Kenya Coffee Traders Association
KFF	Kenya Football Federation
KICC	Kenyatta International Conference Centre
KNBS	Kenya National Bureau of Statistics
KNCB	Kenya National Convention Bureau
KPA	Kenya Ports Authority
KPSGA	Kenya Professional Safari Guides Association
KR	Kenya Railways
KTB	Kenya Tourist Board
KTDGA	Kenya Tour Driver Guides Association
KTF	Kenya Tourism Federation
KWS	Kenya Wildlife Service
MERS	Middle East Respiratory Syndrome
MICE	Meetings, Incentives, Conferences and Exhibitions
MoE	Ministry of Education
MoTW	Ministry of Tourism and Wildlife
NCB	National Convention Bureau
NITA	National Industrial Training Authority
NOREB	North Rift Economic Bloc
NPS	National Police Service
NSE	Nairobi Securities Exchange
NTSA	National Transport and Safety Authority
OE	Oxford Economics
PERAK	Pubs Entertainment and Restaurants Association of Kenya
PHEIC	Public Health Emergency of International Concern
RPK	Revenue Passenger Kilometer
SAATM	Single Africa Air Transport Market
SARS	Severe Acute Respiratory Syndrome
SMEs	Small Medium Enterprises
TFC	Tourism Finance Corporation
TRA	Tourism Regulatory Authority
TRI	Tourism Research Institute
TVETA	Technical and Vocational Education and Training Authority
UFI	Global Association of the Exhibition Industry
UNWTO	United Nations World Tourism Organization
USAID	United States Agency for International Development
WHO	World Health Organization
WTTC	World Travel and Tourism Council

EXECUTIVE SUMMARY

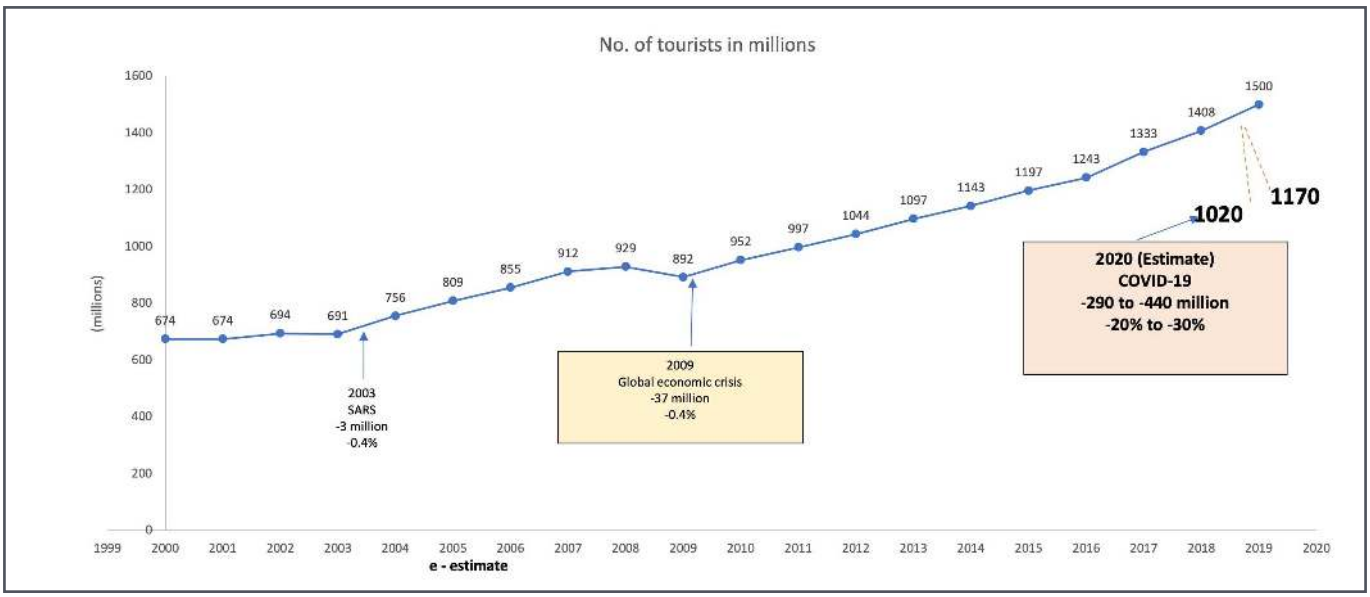
Introduction

1. There has been an extraordinary growth of tourism recorded in 2020 in the world (1.5 billion), Africa (71.2 million) and Kenya (2.05 million).
2. The COVID-19 emerges as one of the greatest challenges facing the world today and threatening the achievements made in the travel and tourism industry.
3. The first case of COVID-19 was reported on 12th December, 2019 in Wuhan City of China. Since then, there were over 5.9 million known cases of COVID-19. Over 360,000 deaths and over 3 million recoveries had been recorded as at 31st May, 2020. Over 3 million cases were active.
4. Tourism is currently one of the most affected sectors worldwide. The UNWTO has emphasized the need to 'putting people and their wellbeing first' through the slogan; 'By staying home today, we can travel tomorrow'. The WHO declared COVID-19 a pandemic on 11th March 2020. Since then, the COVID-19 virus has spread to over 200 countries globally.
5. The airline sector of the tourism industry is adversely affected.
6. There is a ban on international travel worldwide, including Kenya.
7. The COVID-19 outbreak could cause 50 million job loses; which may translate to a global loss in tourism revenue of about USD30 to USD50 billion in 2020.
8. Airline loses are estimated to be more than US$113 billion in revenue in 2020 in the world.
9. Exhibitions have lost over USD145 billion from cancelled contracts worldwide.
10. Airlines in Africa had incurred a combined $4.4 billion in losses by 11th March 2020.
11. Associated revenue losses could reach $125 million while 36,800 jobs would also be at risk in African in 2020.
12. MICE sector could lose roughly KSh163.56 billion in Kenya.
13. WTTC has called on governments to remove or simplify visas wherever possible, cut travel taxes and introduce incentives once the epidemic is under control. WTTC also has encouraged flexibility in the sector, so that travelers can postpone and not cancel their plans.
14. Ministry of Tourism and Wildlife, in mid-March 2020 set aside Sh500 million for the country's post coronavirus recovery plan.
15. Several Recovery strategies have been recommended in this report.
16. The COVID-19 emerges as one of the greatest challenges facing the world today and threatening the achievements made in the travel and tourism industry.
17. Among other sectors, the tourism industry is the hardest hit by COVID-19 pandemic globally, Kenya not an exception.
18. This called for a research commissioned by the Ministry of Tourism and Wildlife of Kenya to investigate the impact of COVID-19 on Tourism: measures taken and recovery pathways.
19. The study collected data from 10 CEOs of Tourism State Corporations, 11 CEOs' of Tourism Associations, 47 officers of County Executive Committees (CECs) and 360 key tourism stakeholders (from the accommodation sector, attractions, destination management organizations, exhibition centers, travel agents, tour operators, event organizers, restaurateurs, and airline operators.



Tourism Growth in the World

The last six decades have seen an extraordinary growth of travel and tourism industry. In 2019, the tourism industry contributed 10.4% of global Gross Domestic Product (GDP) or a value of over US$8.8 trillion. The industry directly created 1 in every 10 jobs globally, an equivalent of 319 million jobs. Despite occasional shocks, international tourist arrivals have shown impressive uninterrupted growth—from 25 million in 1950, to 278 million in 1980, 528 million in 1995, 952 million in 2010, 997 million 2011, 1,044 million in 2012, to 1.5 billion in 2019. Year 2019 was the tenth consecutive year of sustained growth since 2009, at 3.9%, although slower compared to the exceptional rates of 2017 (+6%) and 2018 (+6%) (UNWTO, 2020a; WTTC, 2020a).

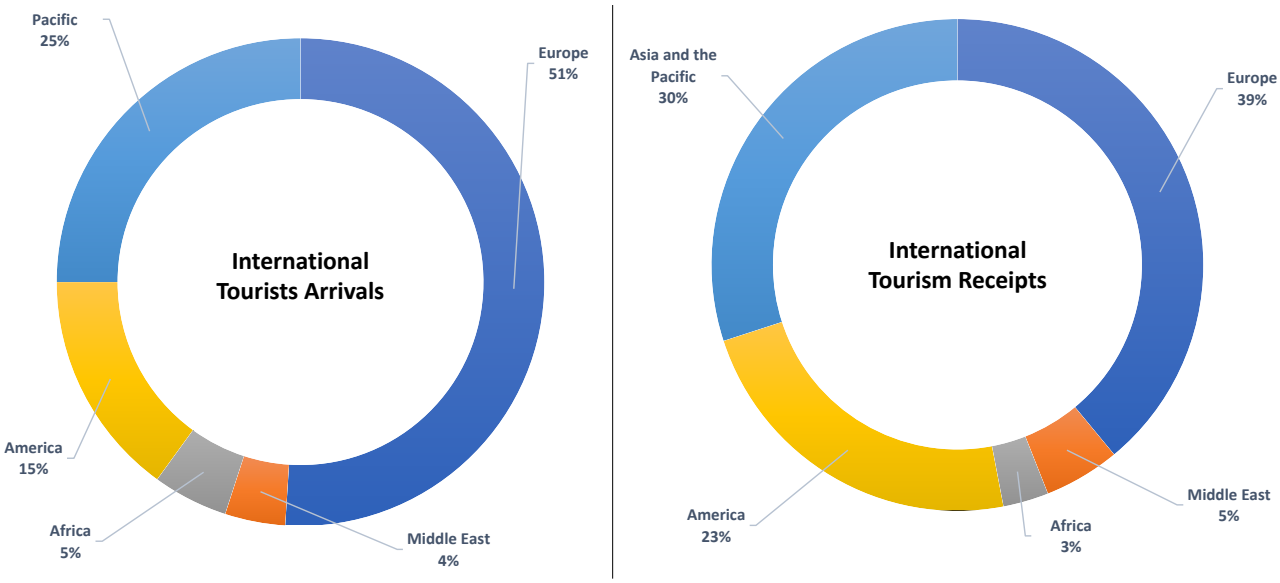


Tourists Numbers in the World

Source: UNWTO (2020a)

Africa

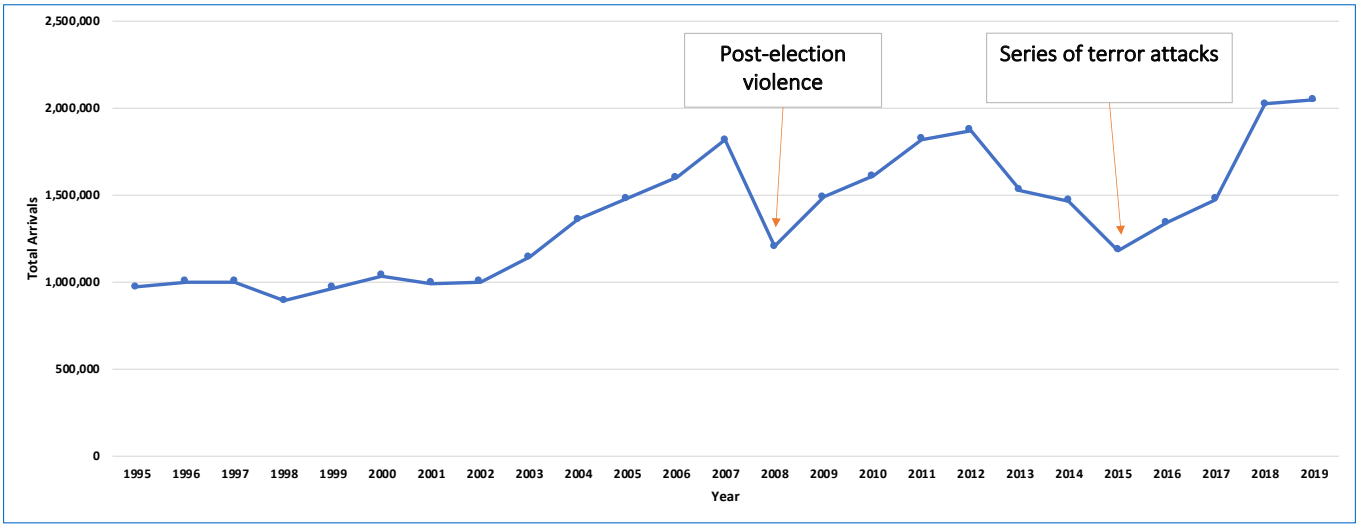
According to the World Travel and Tourism Council, tourism is one of the most important industries in Africa and contributed 8.5% (or $194.2bn) of the continent's Gross Domestic Product (GDP) in 2018 (African Travel and Tourism Association [ATTA], 2019).



The sector contributed 24.3 million (6.7%) of total employment. Domestic spending accounted for 56% of the tourism economy while 44% for international tourism spending comprised 9.6% of the region's total exports, worth $58.5bn (WTTC, 2020a). However, this impressive growth accounts for only 3% of the world share of international tourism receipts.

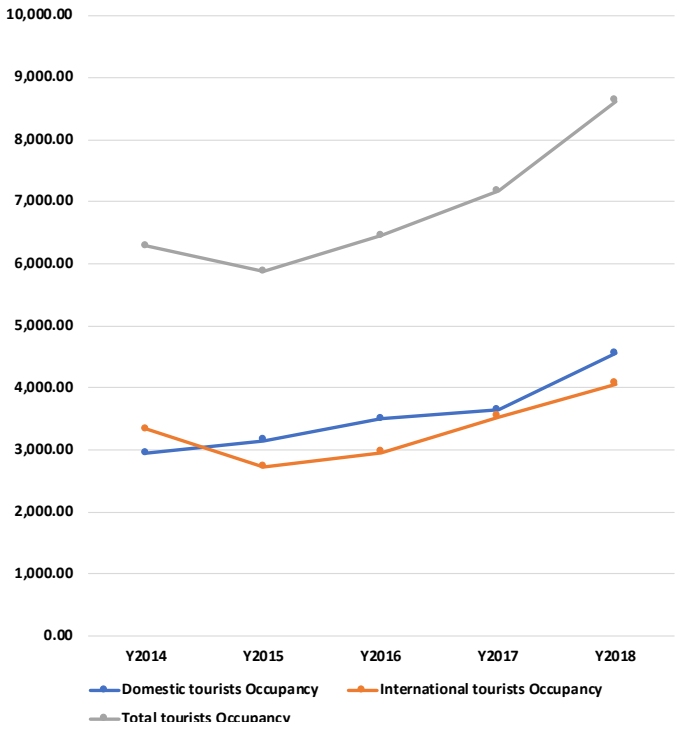
International Tourist Arrivals in Kenya from 1995 to 2019

Kenya has shown an impressive performance in the tourism sector since 2015. The country's tourism arrivals grew by 3.9% from 2.02 million tourists in 2018 to 2.05 million tourists in 2019 (Standard Media, 2020) after a 37.33% from 1.47 million in 2017. Domestic tourism numbers in Kenya grew from 3,645,144 in 2017 to 3,974,243 in 2018, recording a 9.03% growth (Standard Media, 2020).



International Arrivals in Kenya

Domestic Tourism Growth in Kenya



Tourists Bed-nights Occupancy (000's)

Domestic tourism is the main driving force of the Travel and Tourism sector in major economies globally, accounting for 73% in 2017 and 71.2% in 2018.

In Kenya, domestic tourists' bed-night occupancy accounted for more than 50% of the total 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.

Domestic travel supports and develops local and national economies, provides a rationale for infrastructure upgrading, disperses visitors geographically across regions and to least-visited rural areas, bridges the seasonality gap, creates employment opportunities and cushions destinations in times of crises.

Reasons for the Impressive Tourism Growth in Kenya

01 Political stability.

02 Improved security situation.

03 Growth in the aviation sector.

04 Investor confidence.

05 Withdrawal of travel advisories.

06 Visits by foreign dignitaries.

07 Open border policy.

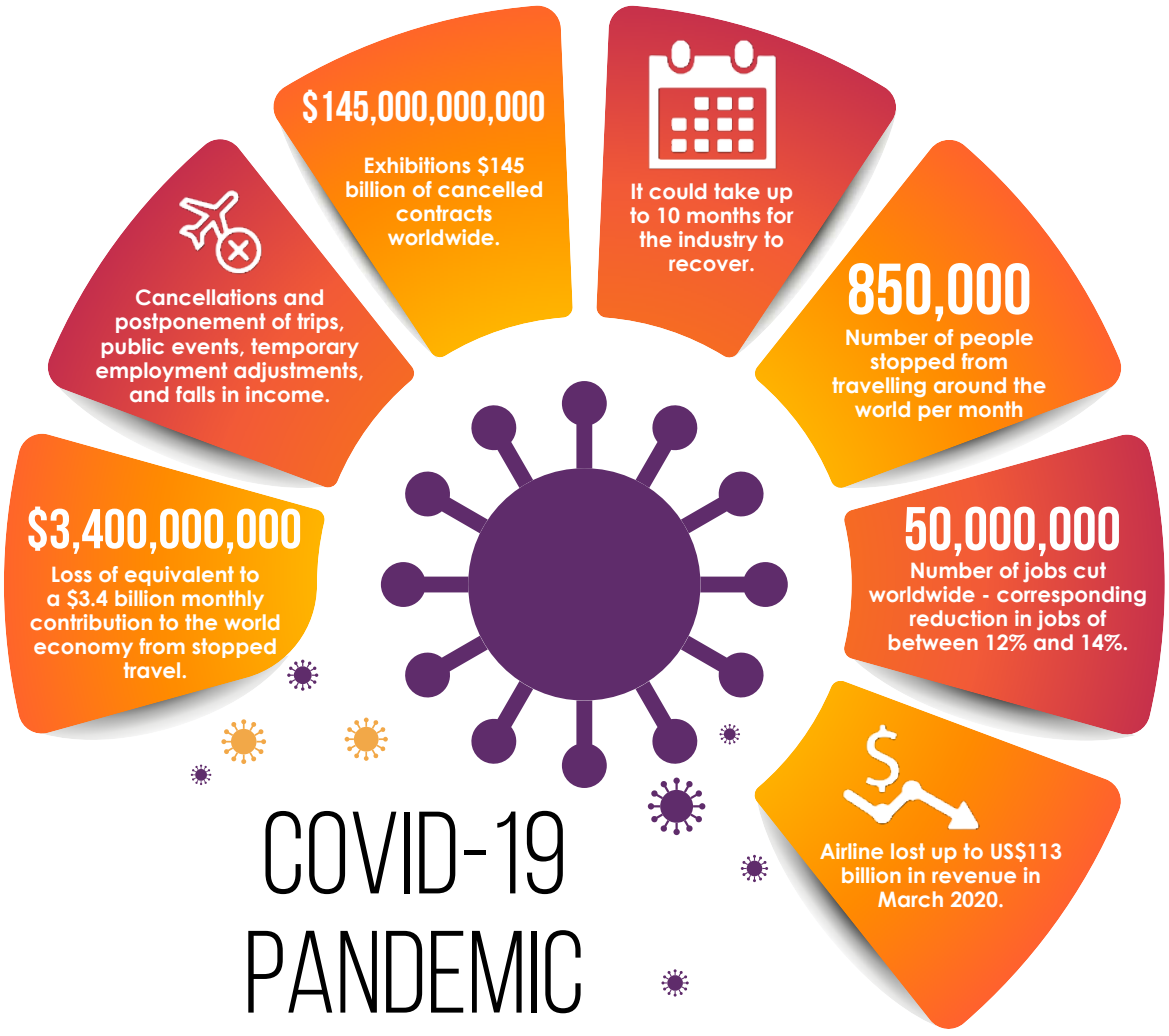
08 Revitalized marketing efforts.

09 Hosting of international conferences.

10 Growth in shared economy.

11 Africa open skies.

Impact of COVID-19 on Global Tourism



According to UNWTO (2020), the COVID-19 Pandemic has further resulted to the following:

Closure of destinations

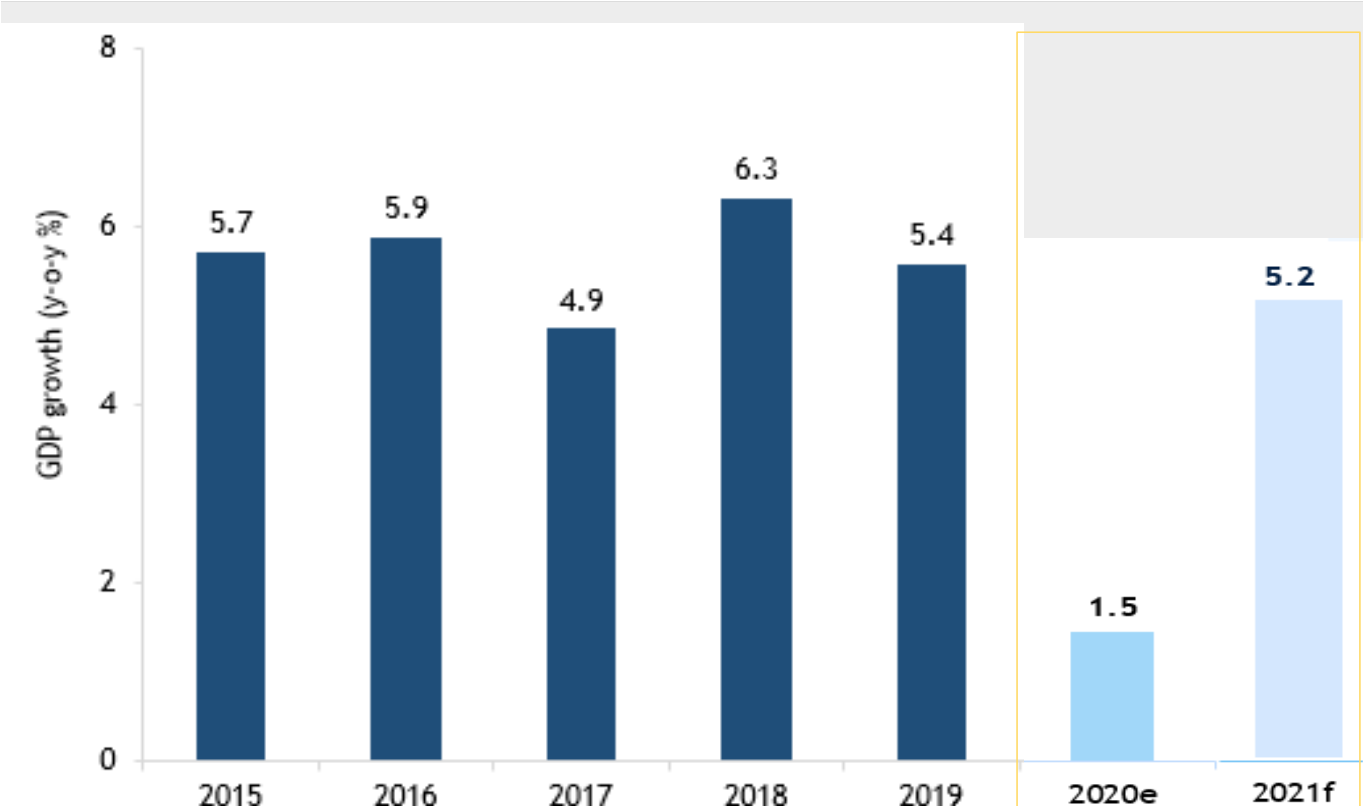
- 96% of all worldwide destinations have introduced travel restrictions
- Around 90 destinations have completely or partially closed their borders to tourists.
- 44 destinations are closed to certain tourists depending on country of origin.

Restriction of movements in and out of destinations (as of 6th April, 2020):

- Africa, Asia and the Pacific and the Middle East - 100%
- America - 92%
- Europe - 93%.

Impact of COVID-19 on the Kenyan Economy

According to World Bank (2020), although Kenya entered the crisis with considerable resilience, the pandemic will have a huge negative impact on its growth.



The baseline assumes containment measures will last for two months. An adverse scenario assumes containment measures stays until after the second half of 2020.

Impact of COVID-19 on Tourism in Kenya

HOTELS

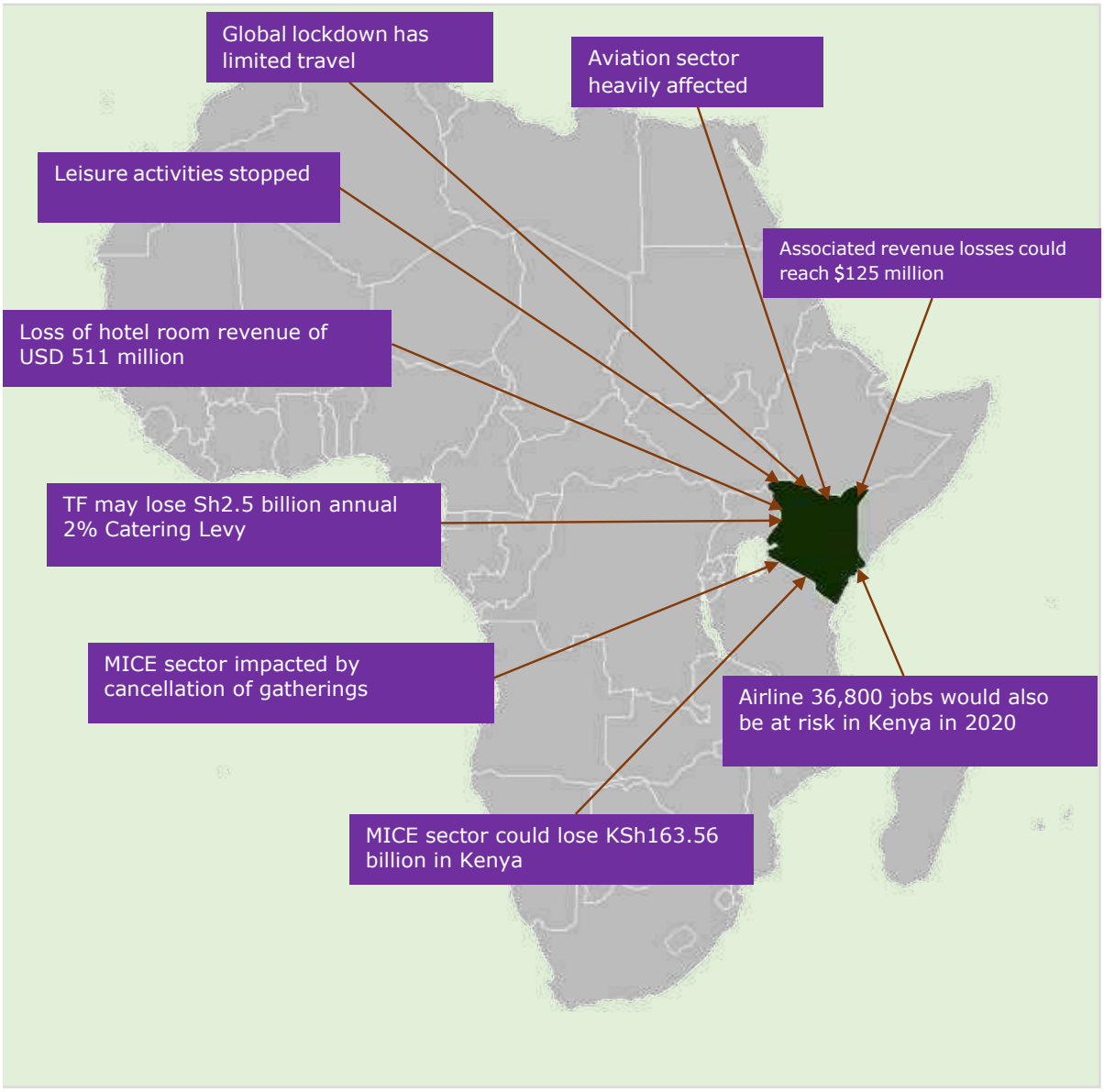
Although the pandemic came during the low tourist season in Kenya, the hotel sector has experienced an abrupt and unprecedented drop in hotel demand that has led to closure of most hotels. Consequently, some hotels have consequently sent some staff on paid and unpaid leaves.

AIRLINES

An escalation in the crisis could see passenger volumes fall by 1.6 million and $320 million in lost revenues.

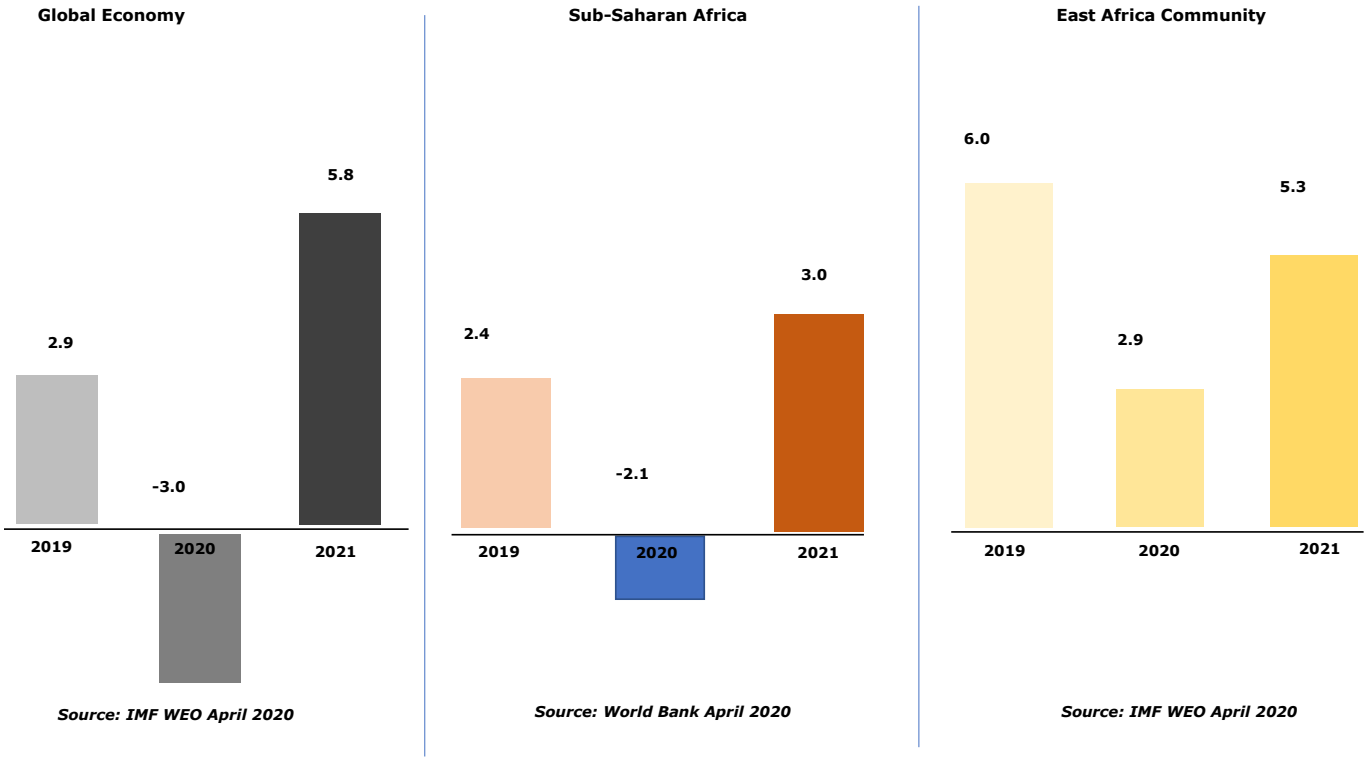
MICE

MICE contributed 13.5 percent of the total 2,048,834 international arrivals in 2019 in Kenya, where at least 276,592 visitors participated in meetings and business. The sub-sector remains key in Kenya tourism receipts which in 2019 grew by 3.9% to KSh163.56 billion, which is threated by COVID-19 pandemic.



Impact of COVID-19 Pandemic on Real GDP Growth Projections (%)

According to World Bank (2020), due to COVID-19 pandemic, a major recession is underway for the regional and global economy in 2020 with a drop of real GDP to -2.1 in Sub-Saharan Africa and 2.9 in Eastern Africa Community.



Source: IMF WEO April 2020

Source: World Bank April 2020

Source: IMF WEO April 2020

Impact of COVID-19 Gross Ticket Sales Comparison – *Kenya (USD and KES Millions)*

(USD Millions) - Gross Ticket Sales Comparison - Kenya					
	January	February	March	April	YTD
2019	56.86	33.52	39.98	37.66	2,187.02
2020	33.11	31.31	10.75	0.03	75.2
Variance	-44.77%	-6.57%	-73.11%	-1.00%	-0.05%

(KES Millions) - Gross Ticket Sales Comparison - Kenya					
	January	February	March	April	YTD
2019	615.17	386.18	443.54	407.2	1,852.09
2020	339.48	285.43	108.9	-2.45	731.36
Variance	-44.81%	-26.09%	-75.45%	-100.60%	-0.61%

Source: KATA Sales Report 2020

Global Measures to Combat COVID-19

Description of the measure taken

Calls countries to:

- Guide businesses to access potentially life-saving loans, and tax breaks, to prevent them from imminent collapse.
- Protect the salaries, incomes and jobs of the millions of people who are at risk.
- Extend vital, unlimited interest-free loans to provide liquidity to large and small Travel & Tourism businesses to prevent them from collapse.
- Waive or remove all dues, taxes or fiscal charges for 12 months that affect cash flow which can be critical to businesses survival.

- Has stressed the importance of international dialogue and cooperation.
- Ensure, with WHO, that health measures are implemented in ways that minimize unnecessary impact on international travel and trade
- Emphasizes tourism's proven resilience and by standing ready to support recovery.
- On 6th April, 2020, UNWTO recommended that mitigating the impact on employment and liquidity, protecting the most vulnerable and preparing for recovery, must be our key priorities.

Specific recommendations

- Mitigating the impact: Supporting self-employed workers, ensuring liquidity, promoting skills development and reviewing taxes, charges and regulations relating to travel and tourism.
- Accelerating Recovery: financial stimulus - favorable tax policies, lifting travel restrictions soon, promoting visa facilitation, boosting marketing and consumer confidence. Tourism to be placed at the center of national recovery policies and action plans.
- Build resilience learning from the lessons of the current crisis - governments and private sector to build preparedness plans.

- Governments to secure the future of exhibition sector through imminent subsidy and credit programmes.
- Many of MICE facilities worldwide are supporting the emergency response to the crisis in their respective cities, building temporary shelters and installing beds in case local hospitals are unable to cope with demand.





COVID-19: Measures to Support Travel and Tourism (Top 5 Most Competitive Countries)

SPAIN
- Temporary collective layoffs aid
- Support businesses
- Guaranteeing liquidity for businesses
- Supporting research
- Liquidity injection of EUR 14 billion

USA
- Seeking for US$ 850 billion stimulus package
- Injecting cash into the economy
- Support for small businesses and aid for the airline industry
- US$ 50 billion secured loans for airline
- Loans for employers with 500 employees for 8 weeks

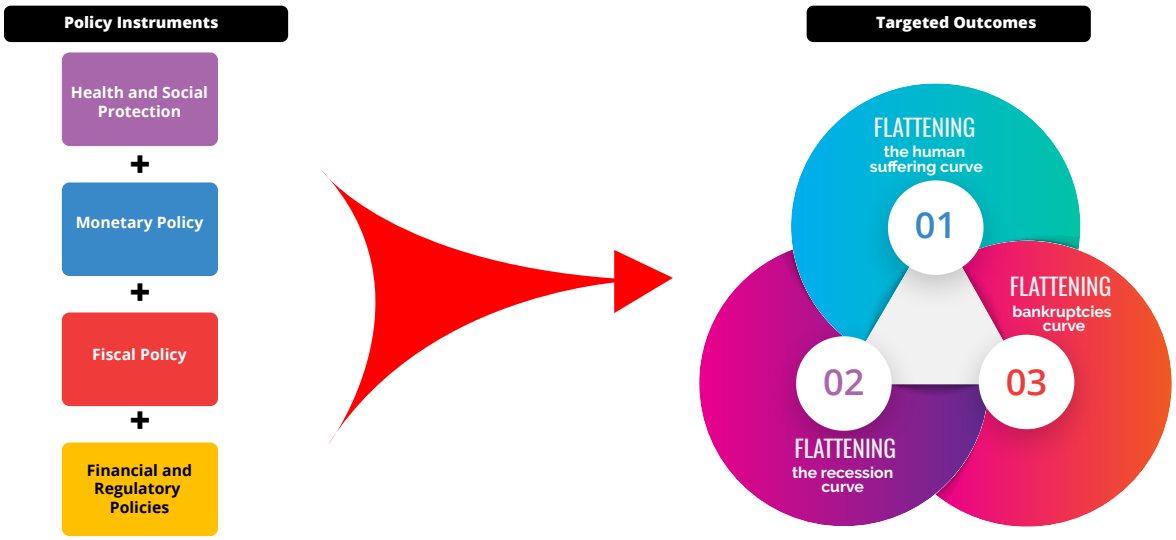
FRANCE
- EUR 45,000 million - "Immediate" support plan for workers and companies
- EUR 300,000 mill - loan guarantees
- A plan to protect threatened companies
- EUR 2,000 million - "solidarity fund" for small businesses especially catering companies & tourism sector
- Deferral of the payment of taxes, rents, water, gas and electricity bills for the smallest businesses
- Aid of EUR 1,500 for the smallest enterprises
- EUR 300 billion to guarantee bank cash lines
- 3,600 businesses and 60,000 workers to claim "technical unemployment" or "partial activity"

JAPAN
- 1,679.4 billion yen - Measures to stimulate tourism demand in Japan
- 10.2 billion yen - Creating attractive stay content for diversifying customers, etc.
- 5.2 billion yen - improving the environment for accepting foreign tourists visiting Japan
- 9.6 billion yen - Promotion to recover demand from foreign tourists
- 1.6 trillion yen - interest-free unsecured loans
- 3.5 billion JPY – Market intelligence - to provide accurate information timely to international travellers and make tourist destinations more attractive
- Government to send advisers and certified tour guides to accommodation facilities before subsides & train on hosting
- Visa restrictions

GERMANY
- EUR 600 billion - Economic Stabilization Fund - for e.g. state guarantees for liabilities
- EUR 50 billion (no credit) for small companies
- Deferral of tax payments

Source: UNWTO (2020a)

A Policy Framework for Mitigating the Impact of the COVID-19 Crisis



Source: Izvorski et al. (2020)

Africa Measures to Alleviate COVID-19 Impact on Tourism



Although Africa is one the regions least affected by COVID-19, countries have banned international travel to reduce the spread of the disease.

Measures taken across the continent to support survival and recovery of the tourism industry include creation of solidarity funds, support to SMEs and tax subsidies.

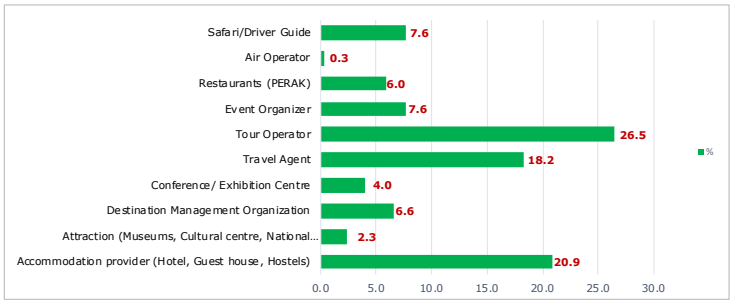
Kenya's Tourism Related Mitigation Measures Against COVID-19 Pandemic

S/No.	Reference	Description of the Measure
1.	12.3.2020	The Ministry of Tourism and Wildlife set aside KSh500 million (USD 4.7 million) to help the tourism sector recover from the COVID-19 outbreak. Part of this money will be used to restore destination confidence to ensure that Kenya remains as a preferred travel destination globally while the rest will be used for the post COVID-19 recovery strategy in all the key source markets.
2.	13.3.2020	Suspension of all non-essential travel to any destination outside Kenya for all government officials, whether on official government business or private business.
3.	13.3.2020	• 30-day ban on all conferences of international nature and those that have more than 15 international participants. • Suspension of all public gatherings, meetings and events for 30 days.
4.	24.3.2020	All passengers coming to the country must undergo mandatory quarantine either at their own hotel, government-approved hotels or in designated government facilities.
5.	24.3.2020	Hotels receiving mandatory quarantine cases were advised by the government to offer modest rates in order to facilitate isolation of people arriving from overseas.
6.	25.3.2020	The government closed the Kenyan airspace to all international passenger flights.
7.	28.2.2020	The president formed the National Emergency Response Committee to monitor the risk posed by COVID-19. The taskforce role is to coordinate Kenya's preparedness, prevention and response to the disease.
8.	25.3.2020	**Monetary Policy** • 100 percent tax relief for persons earning gross monthly income of up to KSh.24, 000. • Reduction of Income Tax Rate (Pay-As-You-Earn) from 30 percent to 25 percent. • Reduction of Resident Income Tax (Corporation Tax) from 30 percent to 25 percent. • Reduction of the turnover tax rate from the current 3 percent to 1 percent for all Micro, Small and Medium Enterprises (MSMEs). • Immediate reduction of the VAT from 16 percent to 14 percent from the National Treasury, effective 1st April, 2020. • Banks to provide relief to borrowers on their personal loans.
9.	6.4.2020	The government imposed a three-week ban on movement in and out of four main coronavirus "infected areas": Nairobi, Mombasa, and Kilifi and Kwale counties.
10.	Feb 2020	Formation of the National Tourism Crisis Steering Committee by the Ministry of Tourism and Wildlife to spearhead crisis resilience and response in tourism in Kenya
11.	March 2020	The National Tourism Crisis Steering Committee commission a study on *The Impact of COVID-19, the measures taken and the recovery pathways.*

A countrywide survey was carried out from mid - March to end of April 2020 to determine 'The Impact of COVID-19, the measures taken and the recovery pathways'. It involved cross-sectional survey using interview schedules and questionnaires; content analysis and economic modeling, through a census of all tourism parastatals and associations across the country.

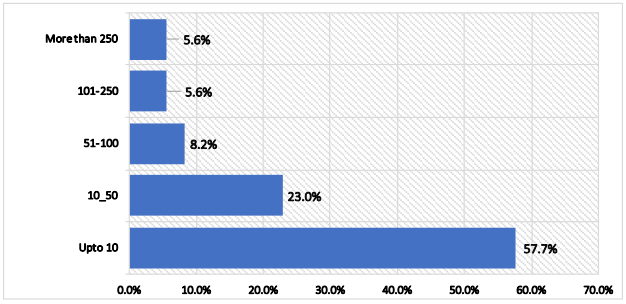
Results of Impact of COVID-19 on Travel and Tourism Industry in Kenya

Business Category



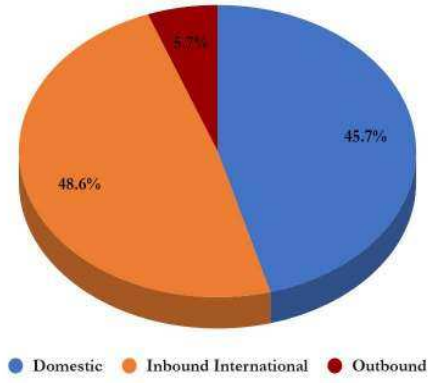
Majority (26.5%) of respondents were under tour operators followed by those working in the accommodation sector such as hotels, guest houses and lodges, accounting for 20.9%. The lowest represented business category in the study was the airline accounting for 0.3%.

Number of Employees Employed by Tourism Organizations



The majority of the respondents employ up to 10 employees, since they consisted of tour operators and travel agents. They mainly target international inbound tourism market.

Target Market



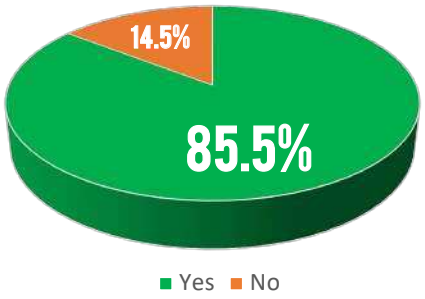
The percentages show that most 48.6% respondents were in businesses serving the inbound international tourism market; 45.7% domestic markets, and 5.7% serving outbound tourism market.

Reduction of Number of Employees Engaged by Tourism Organizations

Category	F	%
Yes	157	81.3
No	22	11.4
Not applicable	14	7.3
Total	193	100

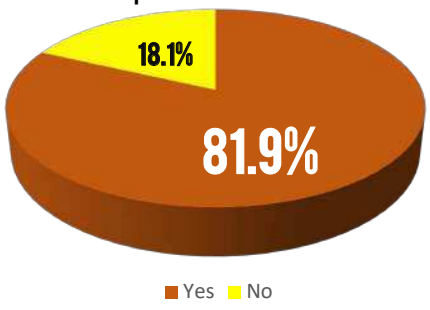
Most (81.3%) respondents indicated that their organizations had reduced the number of employees as a result of COVID-19 outbreak and 11.4% showed otherwise.

Implementation of Pay cuts



Most 85.5% respondents reported that their organization had indeed taken pay cut as a way to survive the loss of revenue as a result of COVID-19 outbreak. Only 14.5% reported otherwise.

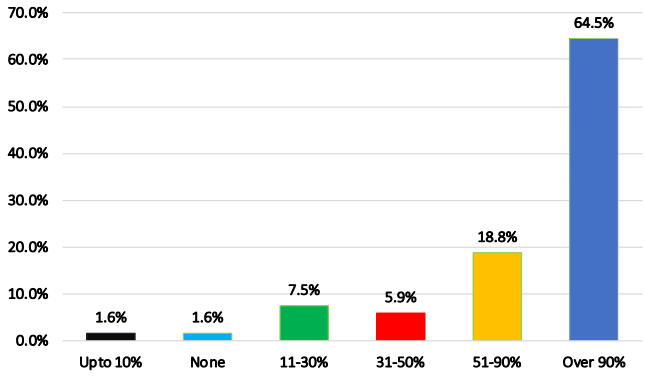
Status of Unpaid Leaves



Most (81.9%) respondents reported their organizations had already sent employees on unpaid leaves with only 18.1% reporting otherwise.

Impact of COVID-19 on Bookings

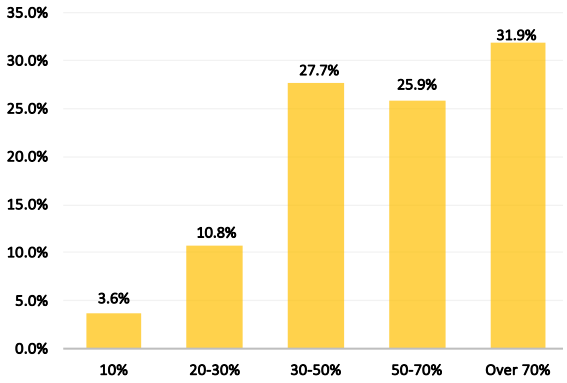
Percentage of Existing Bookings Cancelled



Overall, most (64.5%) of the respondents reported over 90% as the percentage of cancellations of existing bookings experienced by their organizations



Status of Unpaid Leaves



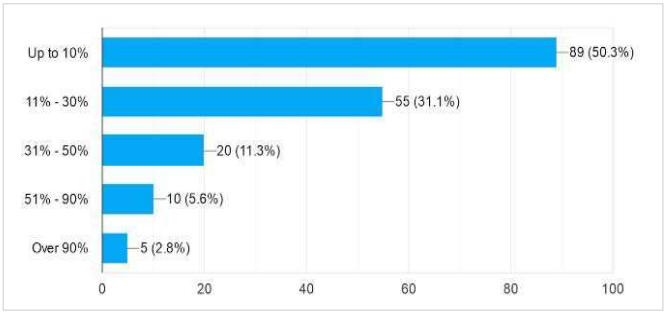
- Quantitative results revealed that about 32% of travel and tourism companies have implemented pay cuts of over 70%.
- Further, in 57% of the organizations, over 70% of the employees have been sent on unpaid leave.
- 74% reported that it is very likely that they will reduce their staff further in the coming months.
- According to the results from interviews, many employees are experiencing unpaid leave, pay cut of 35 – 50 % depending on job group and permanently disengagement.

Tourism Market with Majority of Cancellations

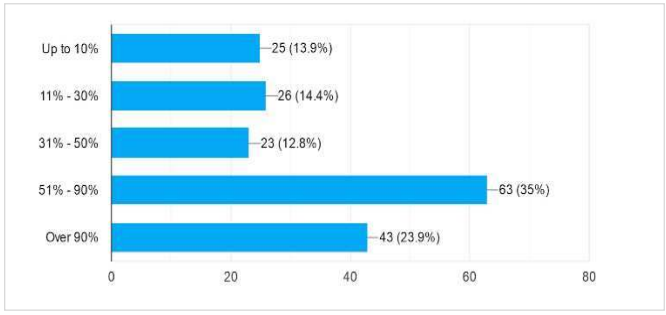
Category	F	%
Domestic visitors	124	64.2%
Regional visitors	74	38.3%
International visitors	157	81.3%
Outbound	29	15.0%
Inbound visitors	2	1.0%
Outbound visitors	1	0.5%

The international tourist market was the hardest hit by the COVID-19 pandemic as reported by most (81.3%) respondents. This was followed by the domestic and regional tourist markets as reported by 64.2% and 38.3% of the respondents respectively. There is need for Kenya to expand the domestic market to cushion the destination in times of crises.

Percentage of the booking changes experienced by tourism businesses from the regional market

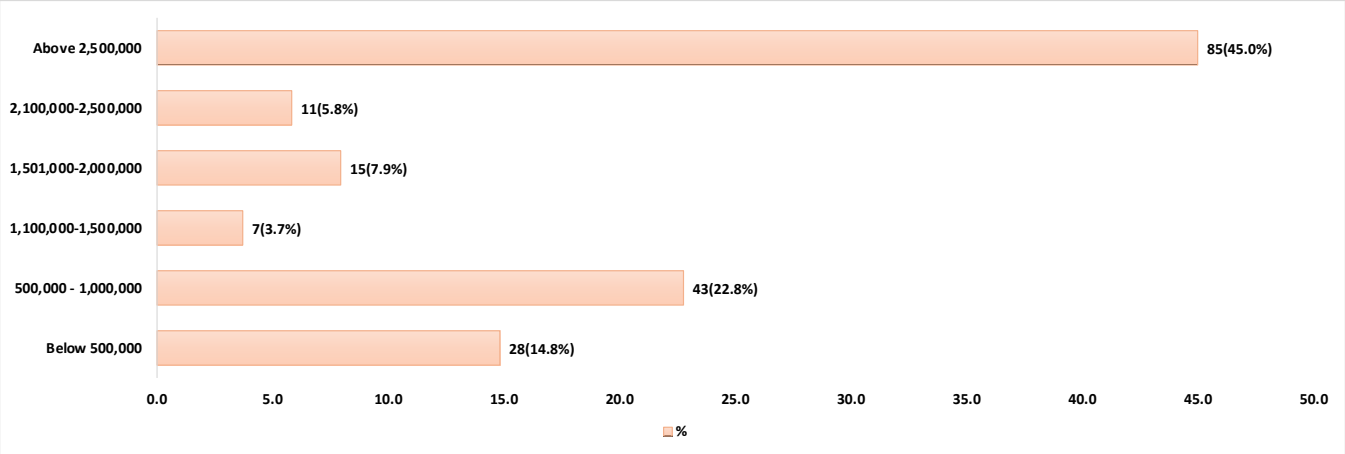


Percentage of the booking changes experienced by tourism businesses from the international market



- The international tourist market was the hardest hit by the COVID-19 pandemic as reported by most 81.3% (157) respondents.
- Most 26.5% (49) repondents reported at most 10% as the percentage of domestic bookings affected by COVID-19 outbreak and 11.4% (21) reported over 90%.
- Most 35% (63) respondents reported 51% - 90% as the percentage changes in bookings from the international market, 23.9% (43) reported over 90%.
- These results show that international market is more affected by any changes than the domestic market. Hence there is need for Kenya to expand the domestic market to cushion the destination in times of crises. 45% of organizations are losing over 2.5 Million as a result of cancellations of booking for the first half of year 2020.

Changes in Revenues As A Result of Cancellation of Bookings
(For a Period from Jan-June 2020)

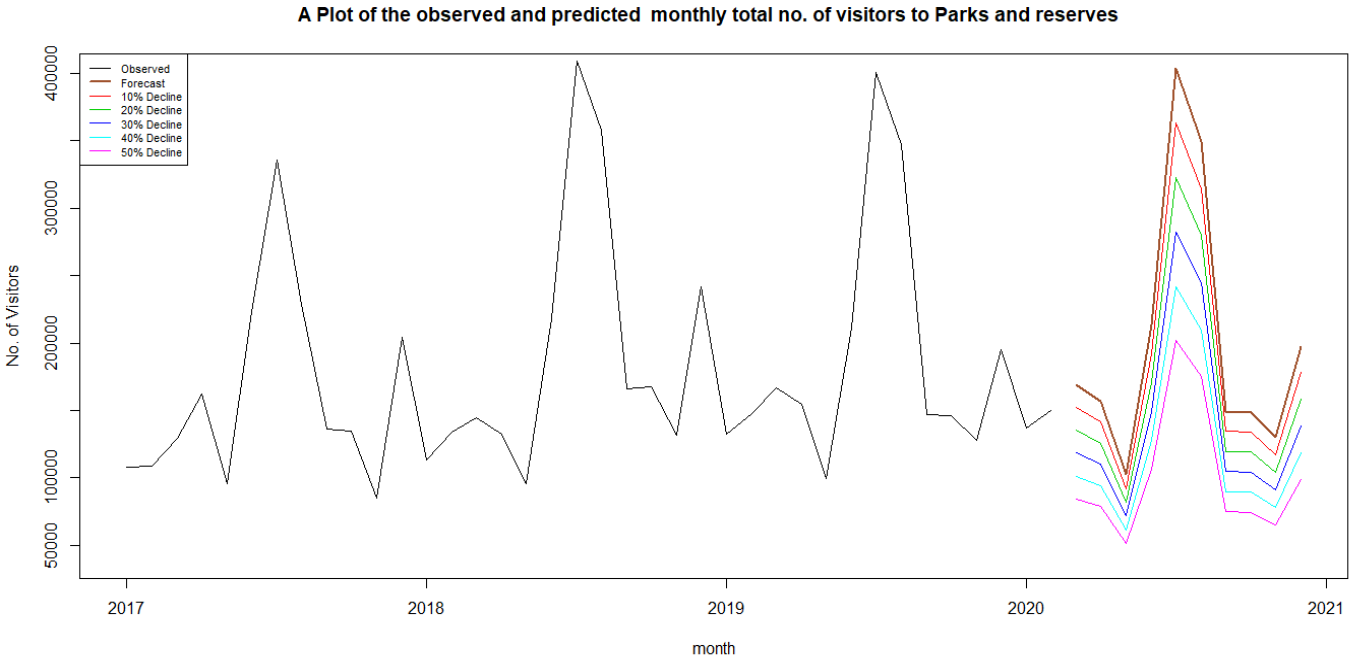


Economic Projections

From the statistical estimates arising from interviews and fieldwork, an average of between 50 and 70% drop in magnitude for several aggregate variables is expected (over a period of 10-12 months). Assuming COVID-19 effects persists for the next 3-5 months ago, the estimated drop-in magnitude would be in the region of 20-50% for most variables. This current report has estimated only the direct /initial/primary effects.

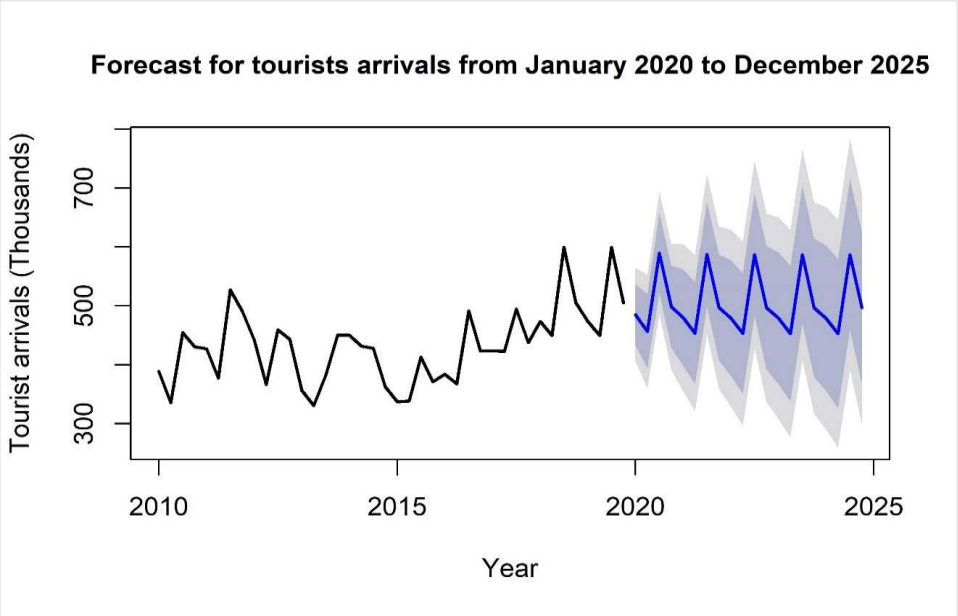
Economic Projections for Parks and Reserves

Cases of decline by 10%, 20%, 30%, 40% and 50% are considered for visitors to parks and reserves. Due to the resilience of Kenya's tourism industry, a post-COVID-19 spike on park visitation is possible both at annual and monthly bases of analysis. If proper recovery pathways are taken, then the industry could return to pre-COVID-19 level by 2021.

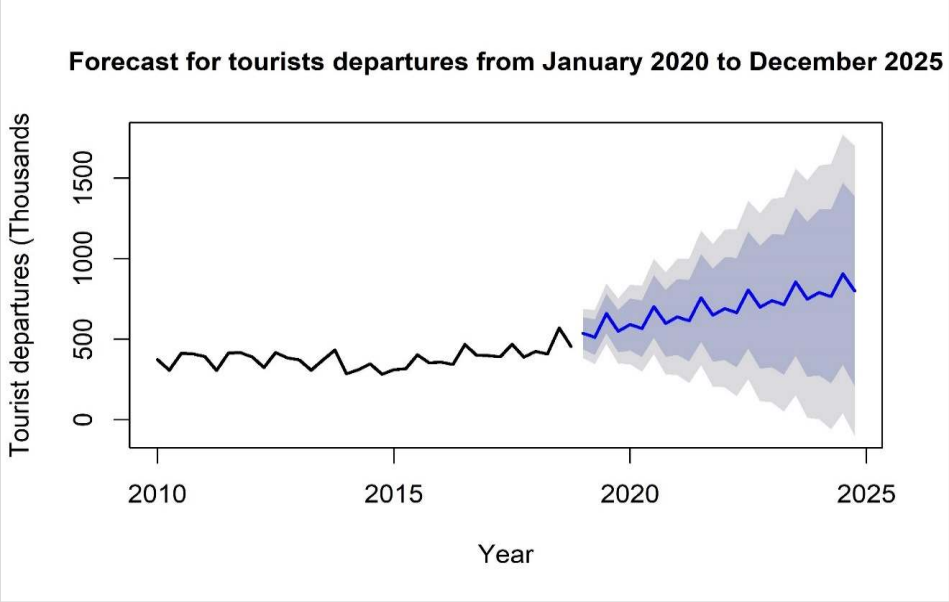


Economic Projections Based on Tourists Arrivals and Departures

The figure below shows an upward trend with a slump during the year 2015/2016. The trend is expected to continue taking an upward movement in the future (2020-2025) based on historical data (assuming no major interruptions). The future effect of COVID-19 on tourist arrivals will be assessed against this trend.



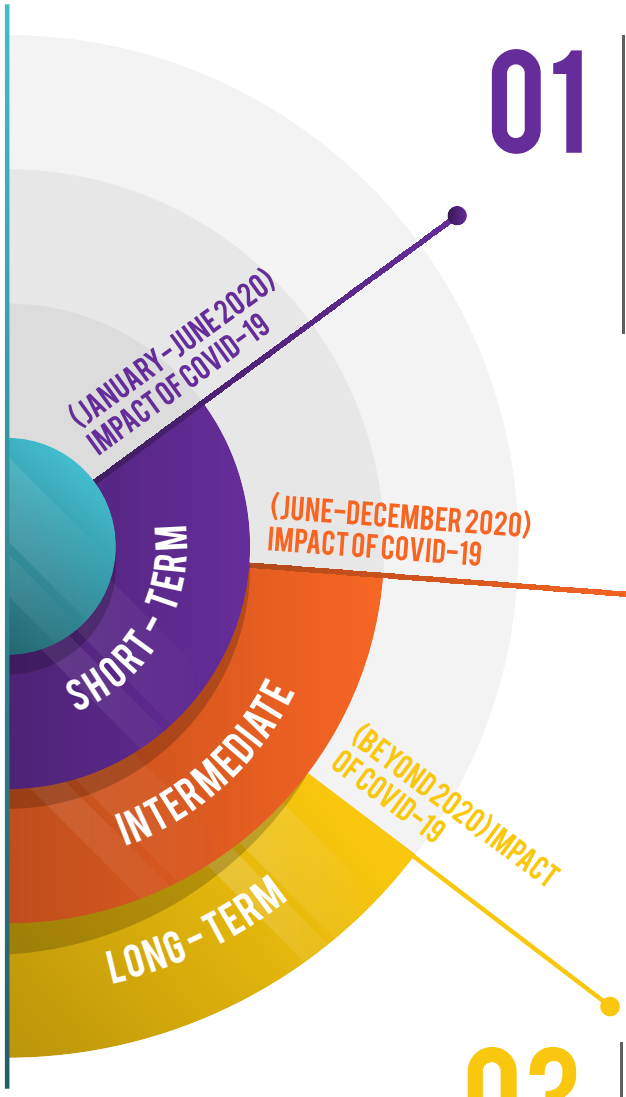
Tourism depature figures below follows a similar trend to that of arrivals except that fluctuations are less erratic. Departures are thus less affected by external and internal factors to the tourism industry of Kenya. Departures from the forecasted trend will reveal the medium and long term impact and effects attributable to COVID-19 and other intervening factors.



Impact of Covid-19 on Tourism at the County Government Level

- Closure of hospitality businesses (hotels, restaurants, and clubs, bars) as a result of travel restrictions and the call by the GoK to stay home and observe social distance.
- Diminished revenues to County Governments as hospitality businesses and tourism service centers (such as recreational facilities) are not in operation. Counties where fishing in activity cannot do the business leading to loss of revenue. The GoK curfew has rendered many tourist activities in all counties to an inertia mode leading to huge decline in revenues collected.
- Agriculture which supports tourism activities has hugely been affected.
- Suspension of state events such as the Madaraka day event. This resulted to loss of hospitality businesses and thus loss of revenues.
- Reduction in local visitation of tourism attraction sites in various counties.
- Reduction in domestic tourism within and outside the counties as a result of travel restrictions and deteriorated sources of revenue.

Timeline of COVID-19 Pandemic Impact on Tourism Businesses



01

The pandemic has brought the following short-term impacts:

- Job losses as employees are declared redundant.
- Reduction of the numbers of employees in form of unpaid leaves.
- Laying-off of temporary workers.
- Implementation of pay cuts.
- Severe loss of revenues.
- Unpaid cost of operating the businesses such as unpaid rent and utilities.
- Cancellation of existing bookings and zero booking of fresh ones.
- Temporary closure of travel, tourism, and hospitality organizations

02

COVID-19 will result in the following intermediate impacts:

- Reduced international tourists' bookings.
- Low business even after recovery.
- Low capital to get back the business to normal operations.
- Eviction from current premises due to unpaid running costs.
- Further loss of revenues.
- Increased job losses.
- Challenges in maintaining overheads.
- Total business closure.
- Increased borrowings to sustain the businesses.

03

COVID-19 is likely to have the following long-term impacts:

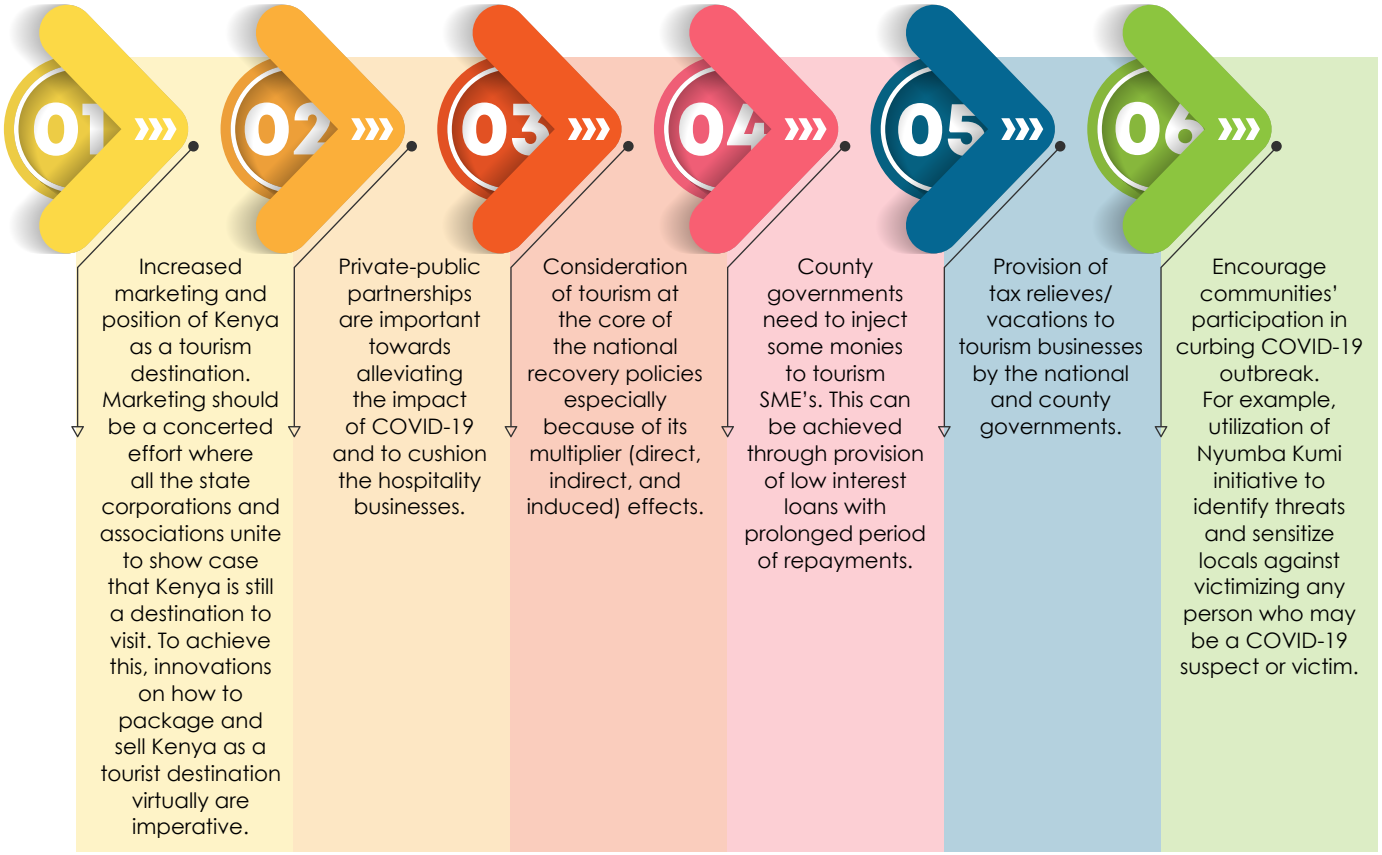
- Business closure.
- Low capital to get back business to normal operations.
- Eviction from current premises due to unpaid running costs.
- Decreased number of bookings.
- Slow resumption of tourism business.
- Global economic recession delaying international tourism arrivals.
- Increased marketing activities and thus increased costs of running the businesses.
- Change in consumer behavior and expectations in social behavior.
- Loss of international licenses on the side of travel agents due to non-payments.



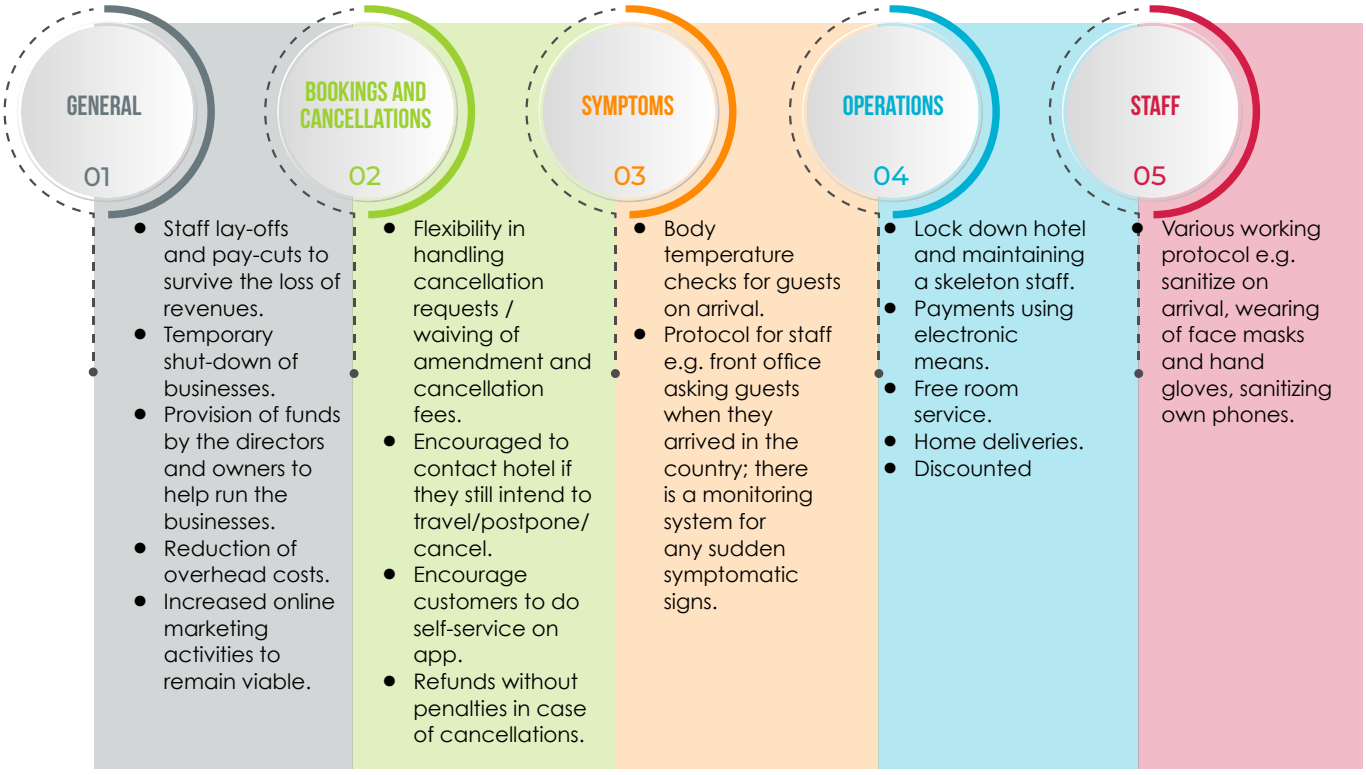
MITIGATION MEASURES

The mitigation measures are to provide strong support for the tourism sector in Kenya to not only recover from the unparalleled impact of the coronavirus pandemic but to do so faster and better.

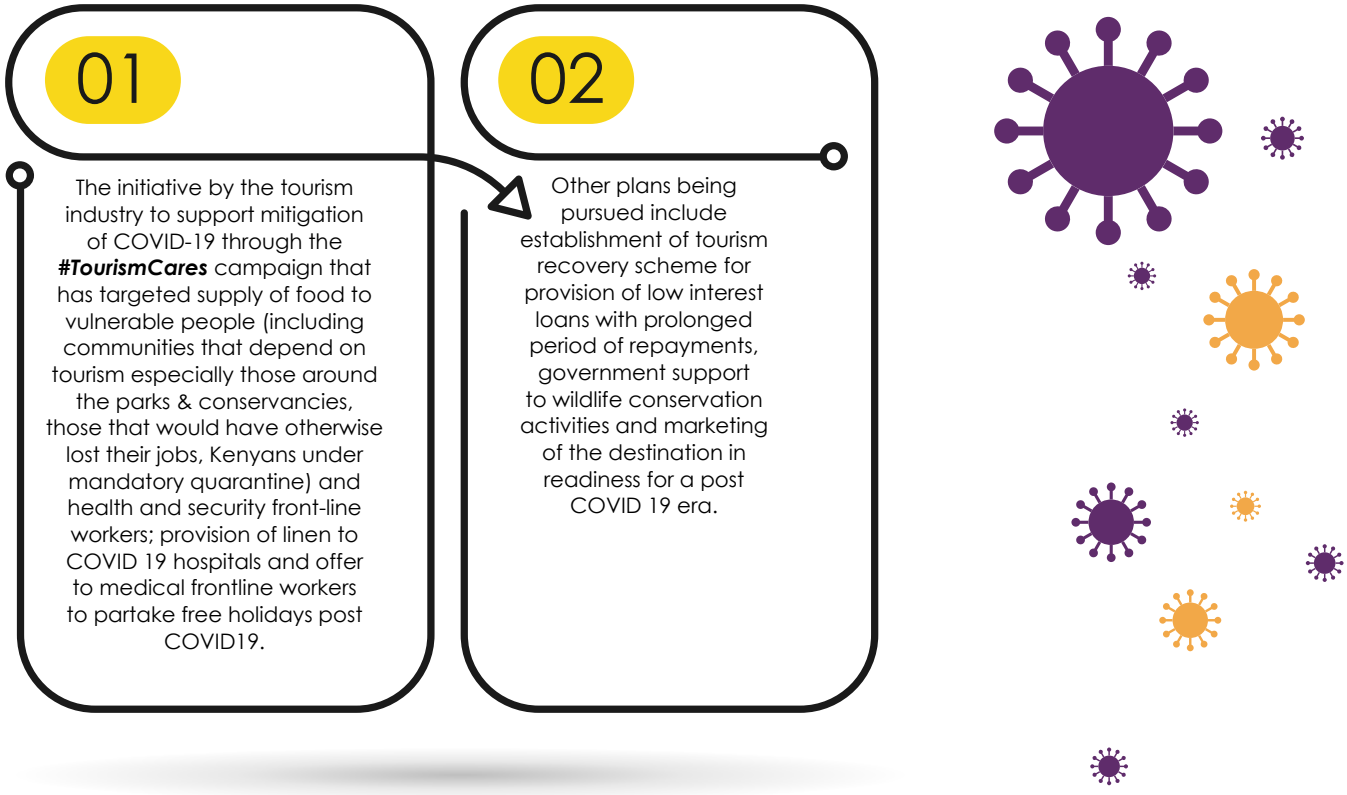
1. Mitigation Measures by the Government of Kenya



2. Mitigation Measures by Tourism Businesses



3. Mitigation Measures by the Ministry of Tourism and Wildlife



RECOVERY PATHWAYS

To recover from the severity of COVID-19, this study emphasizes the importance of:

1. General Recovery Pathways for the Tourism Industry Actors

Financial

- Establishment of an emergency funds to help cushion the businesses in case of crisis like COVID-19.
- Provision of grant by the GoK to help address the pending costs and reopen the businesses.
- Tax relieves and incentives by the GoK.
- Tourism Fund to provide SME's with the requisite funding to enable the businesses operate again.
- Provision of favorable tax policies that will encourage both the international and local tourists to travel tomorrow
- Provision of financial stimulus by the government. The GoK has provided Ksh.500 Million for marketing more of it should be directed towards marketing domestic tourism. Moreover, the Government has put the following measures:
  - *(a) Government has set aside Ksh.500 million (USD 4.7 million) to help the tourism sector recover from the COVID-19 outbreak.*
  - *(b) 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.*
  - *(c) Some stimulus funds will be used to support the operations of Utalii College.*
  - *(d) Ksh.1 billion stimulus package will engage 5,500 community scouts under the Kenya Wildlife Service*
  - *(e) Ksh.1 billion will support 160 community conservancies.*
- Provision of stimulus package to help the businesses stay afloat.
- Economic support. The GoK to maintain the adjusted VAT and other taxies policies for a longer period post-COVID-19 pandemic to enable businesses to come back.
- Reconsider the national and counties' budgets by increasing funds directed towards supporting tourism SME's.
- Development of Business Resiliency Fund to provide interest free loans to tourism businesses affected by COVID-19 outbreak.

Marketing measures	○ Lift travel restrictions when the Ministry of Health allows it. ○ Aggressive marketing in potential markets. ○ Supporting the Domestic Tourism Association. COVID-19 has brought international tourism to grinding halt leaving domestic tourism as best alternative for so many counties, Kenya not an exception. ○ Heightened tourism marketing activities to locals. ○ Increase marketing destination representatives and agents in existing and potential tourists' markets for Kenya. ○ Boosting consumer confidence through marketing and provision of incentives in order to hasten recovery.
Product improvement and diversification	○ Development of products that can spread out people and at the same time isolate. Isolation as a result of COVID-19 will go on for a longer time, so products to cater for the isolation should be developed. ○ Product diversification. Kenya has for long being marketed as a destination for wildlife tourism. There is need to strongly support other products such as MICE tourism by developing more state-of-the-art conferences and meetings venues.
Accessibility	○ Develop competitive airline packages that will encourage more Kenyans to move from one county to another for holidaying purposes. The current packages charged by the local carriers (both private and public) is not friendly to many Kenyans thus halting domestic tourism movements. ○ Lifting travel restrictions, the soonest possible as and when allowed by the Ministry of Health.
Pricing revisions	○ Travel, tourism and hospitality businesses need to adjust their current rates not for the sake of profits, but for the sake of encouraging movements. With movements, employment in the sector will be back.
Research, Crisis Preparedness, and Partnerships	○ Support and encourage participation of all tourism stakeholders in the currently set Global Tourism Resilience and Crisis Management Centre (GTRCMC) to put in place measures that will address other pandemics tomorrow. ○ Stakeholders' involvement. Counties need to engage tourism consultants to give advice and innovation ideas, for example, in product improvement and diversification. ○ County governments' partnerships to develop affordable tourism packages that cuts across. This will encourage domestic/inter-county tourism.

2. Recovery Pathways for Hotels and Tour Companies

Bookings	• Special discounted rates for bookings done in March/April. • Flexible booking policy. • Waiving cancellation/amendment fees depending on seasonality. • All booking/amendments made under flexible booking conditions must be utilized in the next 12 months. • Discounts if re-booked at certain off-peak dates.
Members benefits	• Members can maintain their status without fulfilling necessary qualifications/criteria. • Reduce membership criteria required. • Extension of membership plans and benefits / suspending points expiration dates. • Normal cancellation applies after 30th April, 2020. • Convert booking into points in lieu of travel.
Improve customer relations	• Offering discounts on bookings made during this time. • Having flexible booking policies including waiving cancellation and amendment fees. • Extending members' status without requiring them to fulfil necessary criterion. • Extending membership plans and benefits past their annual expiration dates.



3. Recovery Pathways for the Ministry of Tourism and Wildlife

i. Translate the fiscal, monetary and social measures into action through targeted action plans for the benefit of the tourism industry and track their impact on individuals and tourism businesses.
ii. Transform the tourism public sector through institutional reforms and re-engineering of tourism related government departments and agencies.
iii. Creation of a destination marketing system from the digitalization strategy to inform the product improvement and diversification process that speaks to domestic and regional markets in the short and medium terms and international market in the longer term.
iv. Undertake such researches periodically to continually inform government and its tourism stakeholders as the situation evolves.

4. Case Study Recovery Pathways

a) Kenya Tourist Board (KTB)

Despite a poor season from January till April 2020, Kenya's tourism industry is set to hopefully bounce back from June 2020 after the COVID-19 pandemic. Recovery strategies could include:

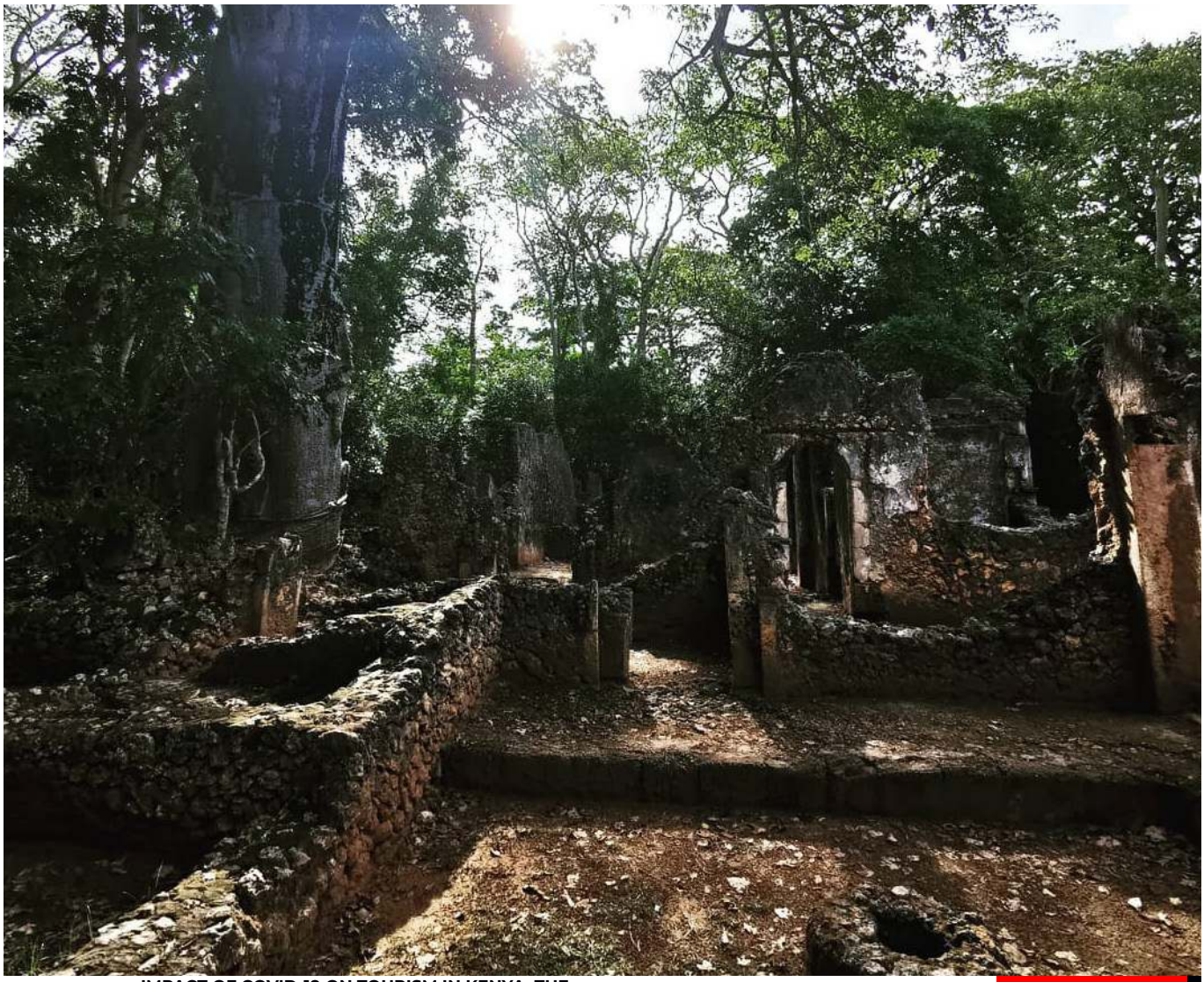
KTB Recovery Strategy April 2020 and Beyond

KTB Plans -Immediate	KTB Plans – Post COVID-19 Plans
• Maintain continuous online destination visibility aligned to *Stay Home, Travel Tomorrow* messaging. (UNWTO Campaign message to support WHO messaging noting that tourism and travel has actively promoted spread of the virus). • Continuous tourism landscape assessment, collating stakeholder feedback, stakeholder engagements to give input to Tourism Recovery Strategy • PR strategy during the Crisis period in media platforms and digital platforms. • Identify themes that will remind people what is Magical about Kenya and inspire them to schedule their post Corona travel. • Rally industry to share content, stories, images, videos, testimonial alongside these themes. • Trade Webinars for the different markets. • Roll out e-learning Program in July 2020. • Patriotic message to Kenyans here and abroad that we are standing with them as our no. one market and also because they are the ones that create & deliver the magic (Target: Kenyans in general, the trade, non-tourism partners). • Develop a Tourism recovery strategy for the following: – Domestic market – Regional markets – Overseas Markets This will kick off in about 4 months.	• Aggressive demand creation in the domestic and international source markets. • Roll out of the Tourism Recovery plans across markets – The Big Idea. • Megafams for trade & Media. • TOPs – Co-op Marketing. • Influencer marketing for niche products/ experiences e.g. the tea/Flowers/Coffee/Athletes ambassador program/ campaign. • Synchronized Kenya themed Events in key source markets.
• Stakeholder mapping based on market re-prioritization (To determine whom to work with).	• Implement a sustained Marketing Incentive campaign with partners that would deliver the most impact in the source markets.

b) Kenya Association of Travel Agencies (KATA)

Strategy	Description	Needed Intervention	Expected Outcome
New business model	A New Business Model needs to be designed for the travel agents, and it must demonstrate its financial strength capacity, and the balance sheet health under an environment of doing business with the novel Coronavirus.	The MoTW to facilitate a linkage with business economists to study the current business model, and to recommend changes on the key drivers that would contribute to a more sustainable business unit.	Right alignment and allocation of business resources on the business drivers. Ability to measure results based on pre-determined KPIs.
Financial solutions	To address the business concern on working capital, there is need to have a Discounting Financial and Supply Chain Financing as an immediate solution for enabling trade-based on the principle that they shall be opening shop in a negative position.	The MoTW to facilitate funds from the national government, and to identify a partner financial institution that can disburse these through an interest-free/concessional rate loan scheme guaranteed by the government fund.	Travel products will become readily accessible to corporate and Government business partners, backed by the funding. This will create an immediate stimulation of consumption of travel products and fast track the recovery of the travel industry with an immediate impact of jobs being saved, and SME businesses in the sector recovering.
Jobs Creation through e-commerce Based Business Model	Undoubtedly, job losses in the Tours and Travel industry will contribute to an increase in poverty levels and a decline in the economy's GDP. However, the novel coronavirus has caused the leapfrogging of our economy into an active e-commerce economy that is heavily supported by mobile money financial services.	The MoTW to fund start-up businesses in the travel sector, with a payback principle upon achieving the break-even on the initial investment costs. Through government support and in partnership with banks and other financial institutions, develop a corporate credit card linked to the Tours and Travel transactions with a capped working capital amount to empower the start-up fund the initial	Low risk business model providing a technology aligned business model for the Youth and Women in the travel industry. Growth of employment levels within the industry driven by the Online Travel Agencies, thus contributing to poverty reduction and growth in Kenya's GDP driven by these SME businesses.

Re-skilling and Up-skilling	The New Normal has disrupted the art and science of doing business. To promote sustainable travel, training in understanding consumer behavior, behavioral economics, data analytics and a research-based business approach will be important.	The MoTW to provide a capacity building fund through Kenyatta University or other registered Universities to promote the re-skilling and up-skilling in the travel industry.	Mind shift in the approach to business and opportunities in the travel industry, with an aim to achieve efficiencies and rapid recovery of the travel industry.
E-commerce marketing	Building of consumer confidence is key owing to the underlying fear factor amongst travelers. Various aspects of experiential marketing, and placement, brand messaging will be key in retelling a new story for travel and destinations.	The MoTW to provide a fund through KTB to provide marketing support through Search Engine Optimization (SEO) and Data Analytics Tools that will strengthen the travel brands placement locally and internationally, and open opportunities to new market places for the sector.	Growth in re-building travel confidence, while building awareness on the new travel protocols amongst travelers. Additionally, this marketing should build long-term tourist demand for Kenyan travel and tourism products showcased.



c) Tourism Regulatory Authority (TRA)

a) Solve the Humanitarian Crisis	• The line of action would be to solve the humanitarian crisis. As such, in our response to this pandemic, we wish to echo the sentiments of the United Nations World Tourism Organization (UNWTO) of putting people and their wellbeing first. As a Regulator, we are highly concerned with the survival of the tourism businesses and the livelihoods of their employees. This calls for us to explore and put in place interventions that will enable MSMEs sustain their operations though in scaled down manner to enable them survive these turbulent times. As such, it is imperative that these businesses are supported to ensure that they are able to retain employees on the payroll for the next three to four months. This intervention will generate a positive ripple effect up and down the tourism value chain considering the great multiplier effect of tourism. Keeping tourism businesses solvent is key to saving jobs and limiting the adverse effects of these pandemic in the medium term.
b) Enhance Standards in the sector	• Going forward in the post covid-19 pandemic period, enhancing standards for tourism enterprises and food safety and hygiene will be the new normal. This will enable destination Kenya to build an image of a safe and hygienic destination in the international market place. As such, it is projected that this pandemic will play a critical role in destination choice thus shape travel patterns not only in the medium term but also in the long term. Therefore destinations embracing standards in their tourism and hospitality establishments, product offerings, real-time interactions and food safety and hygiene standards will have a competitive advantage. The Regulator will therefore give prominence to the development of enterprise standards for facilities and activities as listed in the 9th schedule, food safety and hygiene standards as well as standards governing real-time interactions between the customer and the service provider during the service encounter. • Regular quality assurance audits will be key to ensure that tourism and hospitality enterprises comply with the set minimum standards. • Tourism and hospitality enterprises will also be encouraged to go beyond the set minimum standards for them to be recognized by the Authority through an award of a "Mark of Quality" for excellence (an equivalent of the "super brand" in the manufacturing sector). This will bring additional benefits for the enterprises in that, their links in Authority's website will be interactive. This implies that a client looking for the list of registered enterprises will be able to log into the Authority's website and by clicking the respective enterprise's' link, they will be directed to the respective enterprises' website. This will link will therefore act as a powerful recognition and marketing platform. • Further the mark of quality denoting excellence will be used in all the promotional materials of the respective enterprises and internal communications thus consistently drive the desire of directors and employees in these enterprises to continually adhere and improve on their standards of their services and product offerings.

5. Elaboration on Key Recovery Strategies

Key recovery strategies emanating from various stakeholders include:
A. Domestic tourism growth.
B. Regional tourism growth.
C. Product Improvement and Diversification Strategy and Digitization of tourism.

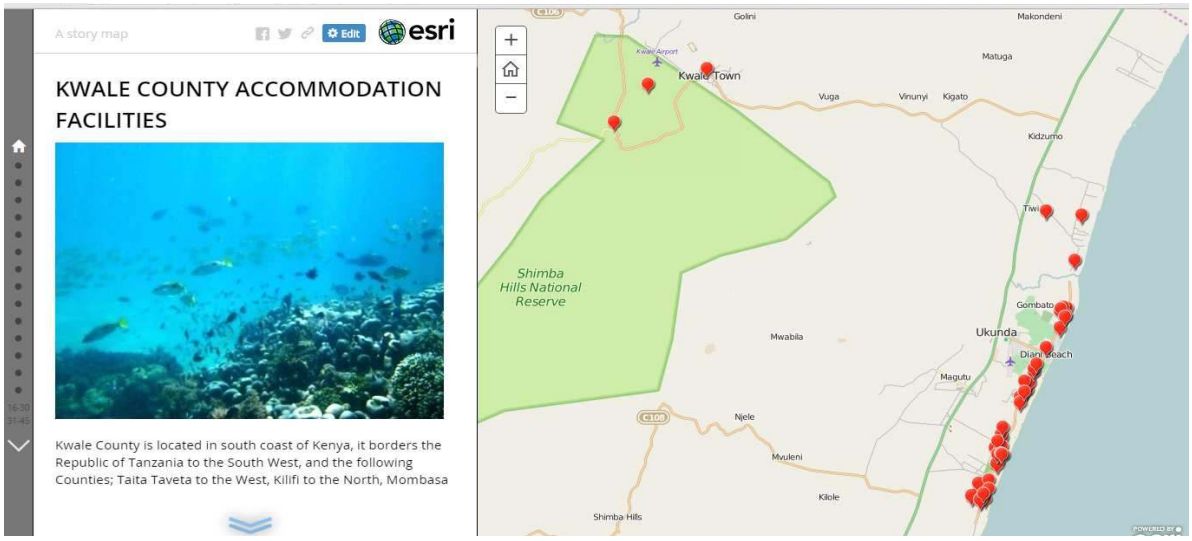
A. Domestic tourism growth
- Target Growing Middle Class - 1,020,681 (36.9%) of employed workforce.
- Propose one week national-wide holiday for all working population during August and December school holidays (prolonged festivals holidays).
- Repackage tourism product with local market interests.
- Make domestic travel more attractive through campaigns.
- Provision of accessible information and ease of purchase.
- Holidays as non-wage benefits.
- Organized road transport to events and attractions.
- Development of circuits with specific itineraries.
- Research on domestic market preferences.

B. Promotion of Regional Tourism
- A total of 825,489 regional tourists from Africa and Indian Ocean visited Kenya in 2018 accounting for 40.76% of the total international tourists, which shows a huge potential for growth.

C. Product Improvement and Diversification Strategy
- To enhance recovery after COVID-19, Kenya needs to improve, develop, diversify, re-package and promote other tourism products in addition to the Africa safari and beach destinations. Tourism Product improvement and diversification may consider various aspects like strengthening Meetings, Incentives, Conferences and Exhibitions (MICE) tourism, birding, cultural tourism, agro-tourism, adventure tourism, Sports tourism products and many others, in relation to the market demand and the resource base of Kenya.
- Key strategies are
  i. Geospatial presentation of Tourism resources in Kenya.
  ii. Capturing Experiences and information.
  iii. Interpretation of the tourism product.
  iv. Packaging Tourism Products.
  v. Pricing revision for Tourism Products in Kenya.
  vi. Digitizing travel and tourism.
  vii. Promote Community - based tourism.
  viii. Fight against the Spread of Disinformation.

EXPLANATION OF KEY STRATEGIES

1. Geospatial Presentation of Tourism Resources in Kenya



In line with making Kenya more resilient to crises, one of the areas that the country can hugely improve on is in the mapping of tourism resources in the country. The Ministry could determine the spatial quantity, capacity, quality, status and distribution of tourism attractions, amenities, activities, accessibilities and ancillary services around the country that will be accessible across the world. The ultimate goal is to create an Integrated Tourism Management System with updated content from all the stakeholders. This will ultimately increase the country's market share and assist with product diversification. The content will also improve the countryɔs competitiveness index, which currently stands at position 82.

(ii) Capturing Experiences and information

Kenya as a destination needs to package information on tourism products through the process of knowledge capturing. **Knowledge Capturing** is the process of converting the knowledge that resides in people's heads, and elsewhere, into tangible, explicit knowledge assets. This will involve recording experiences from all forms of tourism in Kenya in a format that can be stored, further processed, adapted, and shared within and outside the destination.

The **packaged information** from knowledge capturing and other sources will then be shared in form of media such as text, audio, videos, images, graphics, etc. Different media could be used that includes website, social media, emails, narratives at the attractions etc. This information will add value in product packaging and marketing, and prolong the product life cycle in line with the recommendations given in the National Tourism Blue Print 2030, developed by the Ministry of Tourism and Wildlife in 2017.

2. Interpretation of the Tourism product

Interpretation is an educational activity which aims to reveal meanings and relationships through the use of original objects by firsthand experience and by illustrative media, rather than simply to communicate factual information. This will increase the visitor's understanding, awareness and appreciation of nature, of the tourism product hence providing an enjoyable and meaningful experience.

3. Packaging Tourism Products

Enhance existing adventure activities and expand the types of activities offered at key nodes, e.g. through activity centers, to include:

a. Mountain/rock climbing
b. Hiking
c. Mountain biking
d. Slack packing
e. River rafting
f. Zip lining/bridge swings/bungee jumping
g. Scuba diving
h. Entomology

Packaging the product

- Development of a comprehensive tourism products and services database
- Development of Packages or itineraries which will provide a one stop shop, at one, fairer all-inclusive price.
- Create new experiences through packaging, to gives a competitive advantage through marketing or advertising

The following are a range of products and services that can be linked in a package:

- **Food and beverage**
- **Accommodation**
- **Built attraction** – museum, art gallery, theme park etc.
- **Natural attraction** – waterfalls, scenic vistas etc.
- **Transportation**
- **Programming** – gourmet cooking, tea/coffee tasting, wood carving etc.
- **Guided tour**
- **Entertainment** – theatre performance, stage show, concert
- **Event/festival**
- **Shopping**
- **Activity** – hiking, kayaking, alpine skiing, snowmobiling
- **Local culture**

There is need to enhance and package the following new and improved products:

- **Beach tourism**
- **Wildlife Tourism**
- **Business and Conference Tourism**
- **Cultural and Heritage tourism**
- **Homestays, Airbnb and general sharing economy concept**
- **Health and wellness tourism e.g. hot springs, natural forests and products linked to traditional healing, use of natural medicines etc.**
- **Medical Tourism**
- **Ecotourism**
- **Sports tourism**
- **Shopping tourism**
- **Avitourism (Birding)**
- **Photography**
- **Voluntourism (Communities and wildlife/nature conservation)**
- **Flora related tourism**

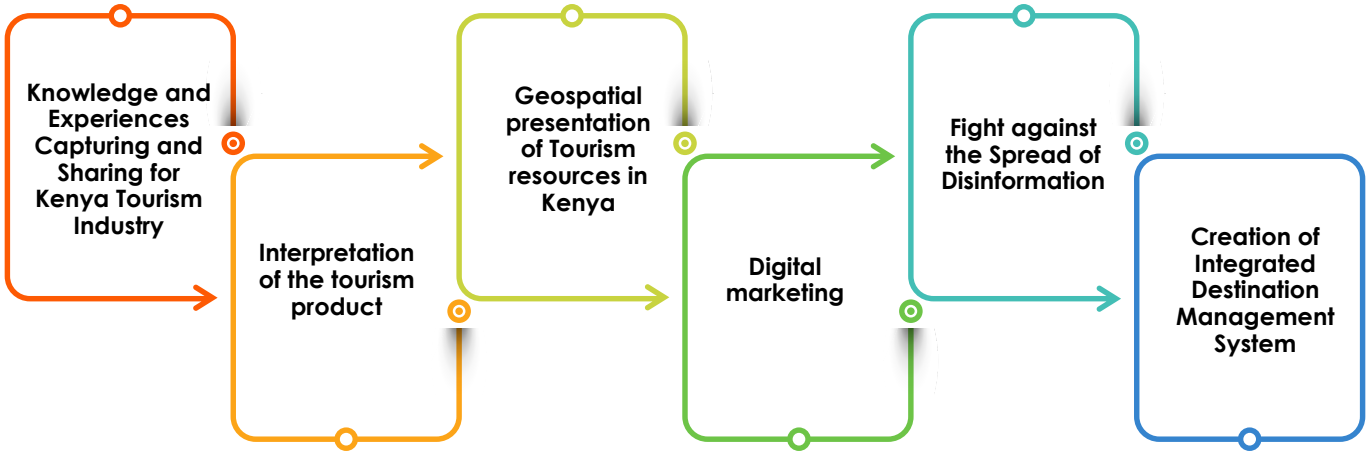
4. Pricing Revision for Tourism Products in Kenya

A major challenge facing the tourism industry in Kenya is the relatively high price of the tourism products. There is need for a study to determine the best prices for hotels, parks, attractions etc. through economic models, in order to remain competitive.

Prices for commodities with markets (such as hotel rooms, food and drinks, transport and communication) can easily be derived through traditional business pricing methods. The current pricing methodologies in the country borrow heavily from the Willingness to Pay/Accept concept. Willingness to pay (WTP) is the maximum amount a person would be willing to offer for a good/service. Willingness to accept compensation (WTA) is the minimum monetary amount required for an individual to forgo some good, or to bear some harm. The optimal price of any non-market commodity is any point between a buyer's willingness to pay (tourists) and a seller's willingness to accept compensation (tourism organizations). Non-market commodities in tourism include especially environment-based resources such as parks and reserves, recreational spaces, and museums.

A review of such studies based on WTA and WTP will be helpful to Kenya as a destination, since tourism resources such as parks, reserves, and museums are largely non-market based. However, the pricing of human-made facilities/resources such as accommodation and transport can be analyzed using the usual traditional market-based approaches. The three most applied methods for measuring WTP are **(i) Contingent valuation (ii) experimental auction and (iii)** conjoint analysis.

5. Digitizing travel and tourism



6. Promote Community-based Tourism

Development of unutilized rural homes for tourism through the adaption of models such as Albergo Diffuso.

7. Fight against the Spread of Disinformation

Key organizations and structures-including, travel and tourism industry stakeholders, community and faith-based organizations, village leaders, and local governments-need to be involved in the effort from an early date to support the response and to help tweak it for maximum effectiveness in each local context. There should be mainstream and social media effort to counter negative information. This could be spearheaded by the Kenya Tourism Board.



MONITORING AND EVALUATION OF THE IMPLEMENTATION OF COVID–19 PROTOCOLS IN TRAVEL AND TOURISM IN KENYA

A. Purpose of the Protocols

To provide the industry with the insights and toolkits which while implemented ensure that the destination is safe, secure, seamless and provides an authentic and meaningful experience.

B. Monitoring and Evaluation of the Implementation of COVID-19 Protocols

This could be done through the use of tracing and warning apps, geospatial digital solutions and evaluation of periodic reports.

- Use of tracing and warning Apps: The Apps should be voluntary, transparent, temporary, cybersecure, using data, relying on Bluetooth technology to provide alerts incase of infections close by. Health authorities should be the only ones to have access to such data and take measures to interrupt transmission chains. These apps should:
  - Provide accurate information on the pandemic
  - Provide a questionnaires for self-assessment
  - Contact tracing and warning functionality
  - Communication capability
  - The Apps could have self-diagnoses and symptom checker applications.
- The industry to embrace innovative geospatial digital solutions to self regulate in different sectors and consolidate all information centrally. Apps could be used to fill periodical questionnaires by travel and tourism operators and for monitoring and evaluation by the government.
- The industry to monitor and evaluate periodic reports throughout the crisis and recommend action or the phasing out of measures that seem no longer necessary.

C. Protocols for Key Industry Sectors

1. Private Sector Cross-cutting Measures

- Obtain reopening license
- Develop a COVID-19 infection prevention plan
- Establish a preparedness plan
- Prepare a response plan
- Develop a staff code of conduct
- Set up coordination committee
- Train the personnel
- Share guest guidelines ahead of trip
- Communicate protocols to staff and guests
- Integrated technologies to enable automation to ensure digital touchless operations
- Use signposting - Safety signs or markings (space, hygiene etc)
- Provide elevator etiquette
- Install visual social distancing markers
- Ensure physical distancing, avoid queuing or mark floors
- Online or self check-in and check-out
- Use thermal scanning process
- Limit the number of guests
- Personal protection equipment (PPE) available to staff eg use of face masks
- Guidance for cleaning crew to all areas of the venue including washrooms, elevators, escalators, conference areas, lobbies, and common areas
- Use selected approved disinfecting products
- Evaluated innovations for cleanliness and disinfection
- Availability of alcohol-based hand rub sanitizer
- Avoid activities in closed spaces
- Sufficient ventilation
- Stay-home policy for anyone displaying any symptoms
- Harmonized health, safety and hygiene protocols.
- Entry-exit screening that is non-intrusive
- Closely monitor the number of guests within the establishment
- Regular monitoring of compliance
- Increased frequency of waste disposal
- Inform guests about support available if questions or concerns arise
- Aligned new protocols with all third-party partners and suppliers
- Digitizing guest services such as digital maps, digital queue management, e-menus, virtual personal shopping, roving concierge and promote contactless payment
- Implement new technologies such as augmented reality or virtual reality to improve visitors' experience before, during and after a visit
- Doors should be opened automatically or remotely
- Statistical information and continuous research

2. Hospitality Industry

A. Operational Protocols

- Evaluated innovations
- Right staffing levels
- Health checks for staff and guests
- Physical distance maintenance
- Guest information & guidelines
- Staff training on:
  i. Infection control
  ii. Social distancing
  iii. Enhanced hygiene measures
  iv. Handwashing, the use of masks and gloves
- Hygiene operations on:
  i. Increased frequency of cleaning
  ii. Innovations eg electrostatic sprays, ultraviolet light
  iii. Contactless check-in
  iv. Personalized service
  v. Health check measures
  vi. Spare isolation rooms
  vii. Physical distancing

B. Safe Experience

- Guest health/temperature checks
- Limited social interaction
- Food safety and hygiene
- Avoiding guest handling of food at buffets
- Offering room service
- Disinfecting, table spacing and social distancing
- Clear, consistent, and enhanced communication

3. Tour Operators and Travel Agents

- Provided staff with the tools and information necessary regarding infection control, physical contact, sharing of food and utensils, appropriate attire, and enhanced hygiene measures, the use of masks and gloves
- Create personalized and small group tours and packages.
- Incentivize domestic tourism, short trips and visits to nearby destinations in the short term.
- Share guest guidelines ahead of trip
- Guest health checks and testing
- Explore collaboration with medical/travel insurance companies
- Allow for voucher redeeming for packages and products
- Promote digital communication
- Promote rent-a-car services
- Allocated seating plans with no rotation
- Provide bins with liner bags and regular disposal
- Sanitation, disinfection and deep cleaning practices across transportation
- Guest health checks and testing
- Support use of contact tracing apps
- Allow for voucher redeeming for packages and products
- Established with partners and suppliers, including shops, showrooms, museums, shows, theatre, parks, reserves, concert halls, factories & farms, that they follow likeminded health, sanitation, disinfection and hygiene protocols

4. Aviation

- Develop a COVID-19 infection control action plan/checklist
- Flexibility in slot allocation practices to match demand
- Ensure certifications and airworthiness
- Confirm partner airports, transport and catering companies are compliant
- Health checks for airline staff
- Occupancy limits in boarding areas and congregation on planes
- Technological innovations
- Reduce passengers' touchpoints
- Increase the frequency of aircraft and cabin cleaning
- Guidelines for food safety on-board
- Pre-arrival risk assessment questionnaire / self-declaration electronic portals
- Non-intrusive entry-exit screening
- Robust COVID-19 testing within a short timeframe
- Assist government with contact tracing
- Provide signage, floor markings and announcements to encourage physical distancing
- Encourage online check in and self-bag drop options
- Speedy baggage claim process
- Ensure health and safety of passengers on-board the plane
- Provide masks for passengers and crew and ensure their use during the whole flight
- Limit movement in the cabin
- Rearrange seats to reduce contact
- Avoid having guests handle food
- Clear, consistent, and enhanced communication both digitally and physically at airports and in the plane
- Limit hand luggage
- Traveler insurance covering COVID-19

5. Airports

- Mitigate risks at departure and/or arrival
- Schedules in place for when operations resume
- Ensure required staffing levels
- Implementation of biometrics and reduce passengers' touchpoints the use of selfcheck in kiosks and bag drop, home-printed bag tags, off-airport processing, greater use of biometric e-gates and boarding card reading gates
- Implement guidelines for food safety in restaurants, cafes and kiosks relating to supply chain control, food handling and preparation, hygiene, sanitation, disinfection, digitization and queue management in line with local legislation
- Monitored the number of passengers in a given space (gates, shops, lounges, etc)
- Evaluated innovations for cleanliness, disinfection and a touchless experience, such as e-shopping, with validation
- Protective screens for staff and use of personal protection equipment (PPE)
- Code of Conduct or list of expected behaviour for staff and operations
- Revisited guidance for cleaning team to all areas of the airport including self-service equipment, baggage trolleys, counters, buggies, security checkpoints, washrooms, elevators, hand-rails, boarding areas, and common areas with a specific focus on high-frequency touch points.
- Feed into contact tracing apps.

6. MICE

- Confirm that key stakeholders are compliant
- Ensure physical distance in layout and limit the number of staff
- Support working from home to reduce density in the workplace
- Design and share visual of floor plans and layout to showcase preparedness
- Share participant guidelines ahead of event
- Health checks for staff
- Use of technologies to enable automation such as contactless registration and contactless payments
- Use digital invitations
- Sufficient ventilation such as air-conditioning and air exchange
- Provided staff with the tools and information necessary
- Selected disinfecting products by venue
- Consider hybrid events in the future using virtual platforms for some

7. Outdoors Activities

- Use recalibrated offices and working spaces to promote social distancing
- Ventilate offices through open windows
- Observe Government mandatory trading hours, delivery hours, packaging disposal, merchandise

to shop floor procedures and product care, social distancing requirements, fitting room occupancy, deep cleaning and sanitization and, the transition to digital receipts.

8. Attractions and Conservation Centers

- Protect employees with various approaches, including barriers, protective coverings, and distancing
- Reduce touch areas
- Monitor entrance
- Manage density of people within the facilities
- Communicate protocols and responsibilities to the guests
- Place signs or markings appropriately
- Use of innovative technology

9. Government

- Develop a COVID-19 infection control action plan/checklist
- Flexibility in slot allocation practices to match demand
- Ensure certifications and airworthiness
- Confirm partner airports, transport and catering companies are compliant
- Health checks for airline staff
- Occupancy limits in boarding areas and congregation on planes
- Technological innovations
- Reduce passengers' touchpoints
- Increase the frequency of aircraft and cabin cleaning
- Guidelines for food safety on-board
- Pre-arrival risk assessment questionnaire / self-declaration electronic portals
- Non-intrusive entry-exit screening
- Robust COVID-19 testing within a short timeframe







1 INTRODUCTION

1.1 BACKGROUND TO THE STUDY

The COVID-19 outbreak has brought the world to a standstill with unparalleled and unforeseen impact in all aspects ranging from our lives, economies, societies and our livelihoods, thus creating a growing risk of a global recession coupled by massive loss of jobs (UNWTO, 2020a). Based on the latest developments such as quarantine measures, travel bans and border closures, UNWTO estimates international tourist arrivals could decline by 20% to 30% in 2020 translating to a loss of 300 to 450 US$ billion in international tourism receipts (exports).

Travel and Tourism is one of the largest and fastest growing economic activities, significant to most countries in the world. This industry has been instrumental in economic and social development worldwide, with benefits such as opening up countries for trade, business, capital investment and job creation (UNWTO, 2020a). The travel and tourism industry is however considered vulnerable industry in comparison to other industries, as it gets more affected due to any external or internal shocks.

Globally, the travel and tourism industry directly contributed approximately (10%) equivalent to 2.9 trillion U.S. dollars to GDP in 2019 (Statista, 2020). The travel and tourism sector experienced 3.5% growth in 2019, outpacing that of the global economy (2.5%) for the ninth consecutive year (WTTC, 2020a). In 2018, passenger air travel comprised over 50% of international inbound tourism, which translated to revenue of around 812 billion U.S. dollars for commercial airlines (Statista, 2020). However, the COVID-19 outbreak which originated in the Chinese city of Wuhan has brought the world to a standstill and presents the global community and the tourism sector with a major and evolving challenge (World Health Organization [WHO], 2020).

The first case of COVID-19 was reported on 12th December, 2019 in Wuhan City of China. On 10th January, 2020 it was reported that the cause of the disease was a COVID-19 of a new sub-type and this was reported to WHO as per International Health Regulations (WHO, 2020). The disease was declared as a Public Health Emergency of International Concern (PHEIC) on 30th January 2020 by the WHO, and then it was declared a pandemic on 11th March 2020, having spread to more than 100 countries in the world (WHO, 2020).

The COVID-19 outbreak is having a significant impact on the global economy and markets (World Economic Forum, 2020). The tourism sector is currently one of the hardest-hit by the outbreak of COVID-19, with significant impact on both travel supply and demand (UNWTO, 2020a). The worldwide outbreak of COVID-19 has had a significant impact not only those wishing to make use of the tourism industry, but also those working in the industry and even the economies of entire nations (Statista, 2020). The COVID-19 pandemic has prompted all destinations worldwide to introduce quarantine measures, travel restrictions and border closures to contain the spread of the virus, which in return have caused a slump in demand among travelers (UNWTO, 2020a). While airlines are seeing an unprecedented drop in passengers, other branches of the tourism industry are facing similar setbacks, ranging from closures in the food and drink industry, the event industry, to decreasing guest numbers in the accommodation industry (Statista, 2020).

The financial repercussions as a result of COVID-19 have already begun to manifest themselves within the tourism industry. Global revenue from the travel and tourism industry is estimated to drop from a forecasted 711.94 billion U.S. dollars to 568.6 billion U.S. dollars, representing a decrease of over 20% in 2020 (Statista, 2020). With travel plans and conferences cancelled, and airlines grounded, it is estimated that global international tourist arrivals might decrease by 20–30% in 2020 down from an estimated growth of 3% to 4% forecast in early January 2020. This would lead to a potential loss of US$300–450 billion international tourism receipts (exports) almost one third of the US$ 1.5 trillion generated in 2019 (UNWTO, 2020a). The COVID-19 epidemic is also putting up to 50 million jobs in the global travel and tourism sector at risk, with travel likely to slump by 25% this year, with Asia being the most affected continent (World Economic Forum, 2020; WTTC, 2020a). On 5th March 2020 the International Air Transport Association (IATA) predicted the COVID-19 outbreak

could cost airlines $113 billion in lost revenue as fewer people take flights (IATA, 2020a).

The COVID-19 pandemic is inevitably having an enormous impact on the travel and tourism industry, ranging from airlines, cruise ships, hotels and other sectors of the industry. The virus has spread to all the continents in the world and Kenya is among the affected countries. The first case of the virus was reported in Kenya on 12th March 2020 (Ministry of Health, 2020a). The first death in Kenya from the COVID-19 was reported on 26th March 2020. As of 31st May, 2020, there were 1,962 reported cases of COVID-19, 64 fatalities, and 474 recoveries in Kenya (Ministry of Health, 2020a).

Tourism establishments all over the world have been encouraging all their customers not to travel amid the COVID-19 outbreak and to instead prioritize their health by staying home and choosing to travel in future (UNWTO, 2020a). Economic sectors in Kenya, like other countries, have been heavily impacted by the COVID-19 pandemic. Therefore, this study sought to analyze the impact of COVID-19 on the tourism industry in Kenya, examine the measure taken to combat the virus and develop recovery strategies for the industry.

1.2 PURPOSE OF THE STUDY

To determine the impact of COVID-19, measures taken to mitigate against the effects and the recovery pathways on travel and tourism industry in Kenya.



1.3 SPECIFIC OBJECTIVES

i. To analyze the impact of COVID-19 on the travel and tourism industry in Kenya.

ii. To examine the measures taken against COVID-19 in the travel and tourism industry in Kenya.

iii. To propose the recovery pathways in dealing with COVID-19 in travel and tourism industry in Kenya.

iv. To recommend best practices in managing COVID-19 as a crisis in the travel and tourism industry in Kenya.

1.4 GROWTH OF THE TRAVEL AND TOURISM INDUSTRY

1.4.1 Global Perspective

The last six decades have seen extraordinary growth for travel and tourism. According to WTTC, in 2019, the tourism industry contributed 10.4% of Global Gross Domestic Product (GDP) or a value of over US$8.8 trillion, and has directly created 1 in 10 jobs globally. This is equivalent to 319 million jobs (WTTC, 2020a). Despite occasional shocks, international tourist arrivals have shown impressive uninterrupted growth—from 25 million in 1950, to 278 million in 1980, 528 million in 1995, 952 million in 2010, 997 million 2011, 1,044 million in 2012, to 1.5 billion in 2019 (UNWTO, 2020a). Year 2019 was the tenth consecutive year of sustained growth since 2009, at 3.9%, although slower compared to the exceptional rates of 2017 (+6%) and 2018 (+6%) (UNWTO, 2020a). Demand was slower mainly in advanced economies and particularly in Europe. Based on these trends, economic prospects and the UNWTO Confidence Index, UNWTO had forecasted a growth of 3% to 4% in international tourist arrivals worldwide in 2020.

This extraordinary growth was achieved amidst multiple challenges and shocks that the world has suffered in the recent past,

ranging from man-made crises such as major political changes in the Middle East and North Africa to natural disasters in Japan and other parts of the world and global economic crises - from which the world is still recovering (UNWTO, 2020a). The industry, despite being extremely vulnerable, has always bounced back, proving its resilience and capacity to rebound (UNWTO, 2020a). However, COVID-19 represents a mega challenge to the world travel and tourism industry, which could result to a sharp drop in tourist numbers in 2020 by between -20% and -30%, as per the UNWTO estimates as at end of March 2020. Figure 1.1 shows the number of tourists travelling across borders from 2000 to 2020.

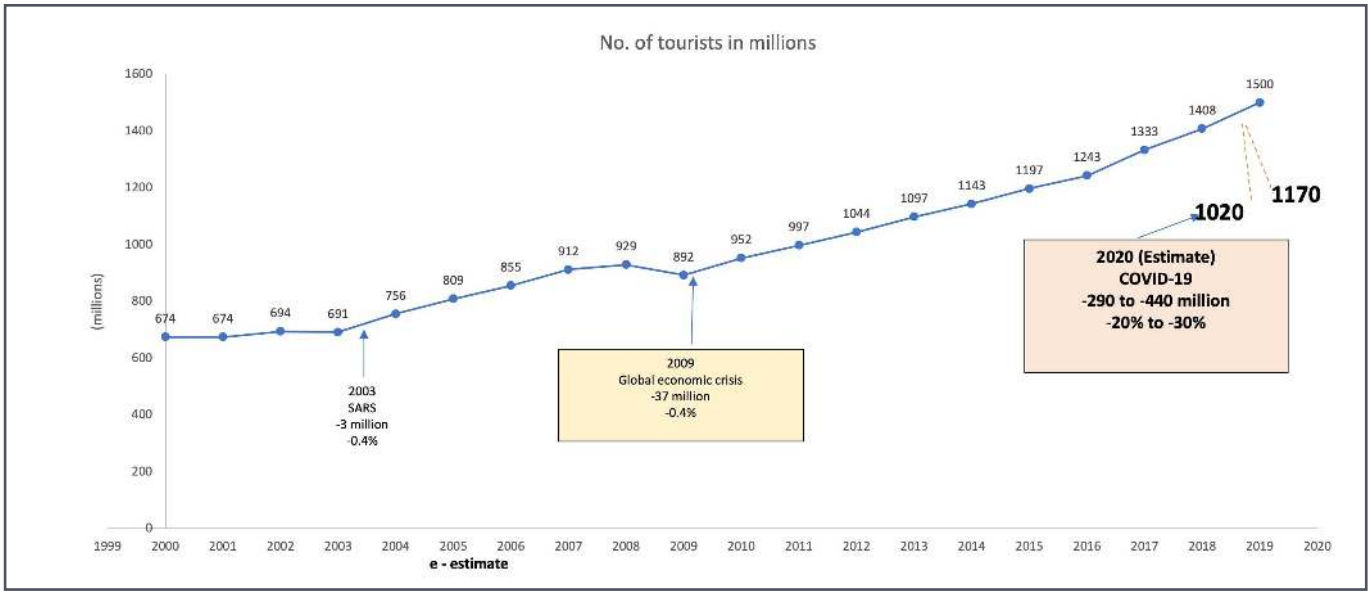


Figure 1.1: Tourists Numbers in the World
Source: UNWTO (2020b)

1.4.2 Africa Perspective

Africa showed strong resilience since 2009, a year tagged by the UNWTO as one of the toughest for the tourism industry, characterized by continued global economic recession which was aggravated by the uncertainty around the AH1N1 influenza pandemic and Severe Acute Respiratory Syndrome (SARS) (UNWTO, 2011). Africa was the second-fastest growing tourism region with 5.6% growth in 2018 against a global average growth rate of 3.9% (WTTC, 2020a). The continent recorded a steady growth since 2009 and recorded a 4% growth in international tourist arrivals in 2019 (a total of 71.2 million), in line with the world average (UNWTO, 2020a).

While the majority of international tourism currently occurs in developed countries, with 5% of international tourists visiting Africa (as shown in Figure 1.2), the sector is a vital contributor to the economy of many developing countries.

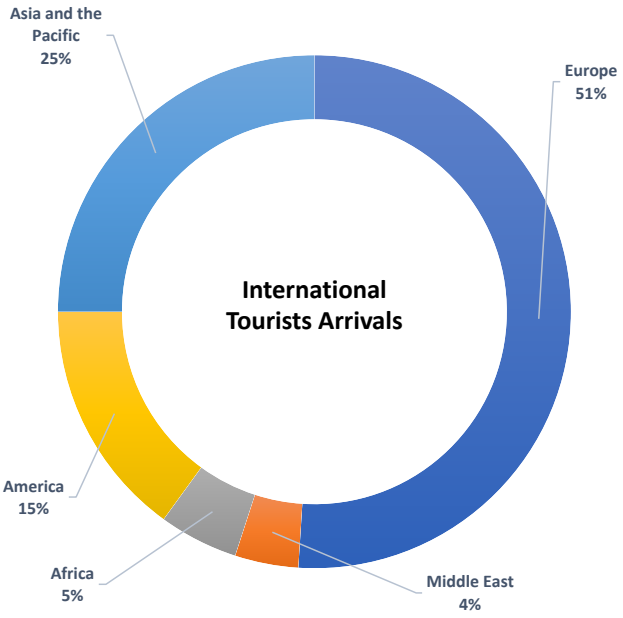


Figure 1.2: International Tourist Arrivals
Source: UNWTO (2019)

Tourism is one of the most important industries in Africa and contributed 8.5% (or $194.2bn) to the continent's GDP in 2018 (WTTC, 2020a). The sector contributed 24.3 million (6.7%) of total employment. Domestic spending accounted for 56% of the tourism economy while 44% for international tourism spending comprised 9.6% of the region's total exports, worth $58.5bn (WTTC, 2020a). However, this impressive growth accounts for only 3% of the world share of international tourism receipts, as shown in Figure 1.3.

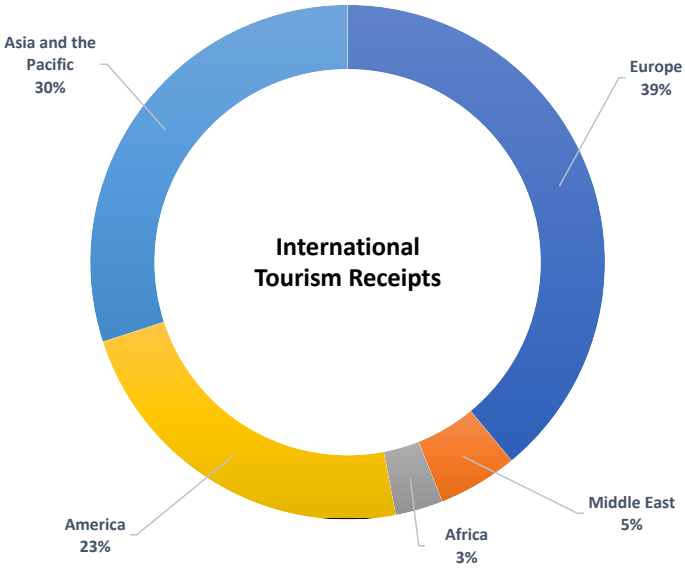


Figure 1.3: International Tourism Receipts
Source: UNWTO (2019)

1.4.3 Kenyan Perspective

For Kenya, tourism is one of the major economic pillars and is currently the third largest tourism economy in Sub-Saharan Africa after South Africa and Nigeria (GoK, 2019). The sector is the second largest contributor to foreign exchange earnings of over US$1.57 billion and has created 1.1 million jobs (WTTC, 2020a). The movement of such a massive number of people and the associated expenditure has a profound impact on national, regional and local economies across the world, and more specifically in the country. Spending by visitors on facilities and activities such as sporting and cultural events, shopping, accommodation, restaurants, visitor attractions and as business visitors at conferences, provides a massive stimulus to local economies and employment (Deegan, 2020).

The country has shown an impressive performance in the tourism sector since 2015. More specifically, the country's tourism arrivals grew by 3.9% from 2.02 million tourists in 2018 to 2.05 million tourists in 2019 (GoK, 2019) after a 37.33% increase from 1.47 million in 2017, as shown in Figure 1.4. Domestic tourism in Kenya grew from 3,645,144 in 2017 to 3,974,243 in 2018, recording a 9.03% growth (GoK, 2019).

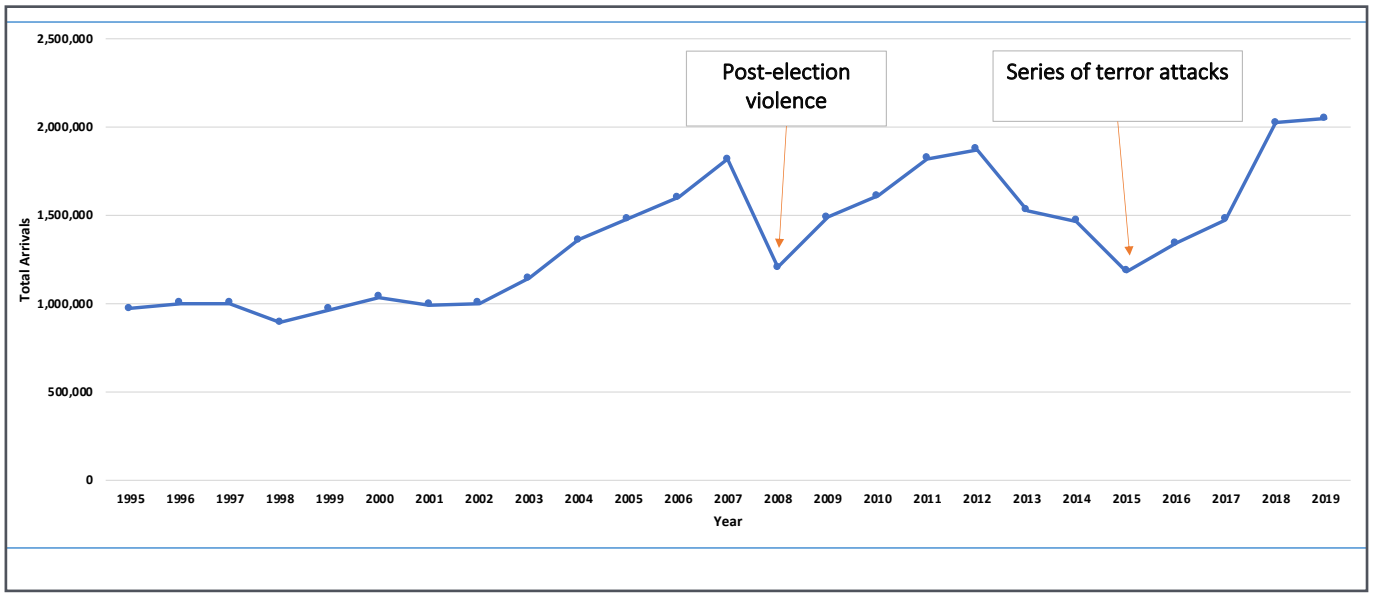


Figure 1.4: International Tourist Arrivals in Kenya from 1995 to 2019
Source: Adapted from KNBS (2011) and GoK (2018)

Notably, tourism in Kenya experienced sharp declines in 2008 and 2015. The decline in 2008 resulted from the unrest following the disputed elections at the end of December 2007. The instability had a disastrous effect on international tourism arrivals in 2008 and it took around three years for the numbers to return to 2007 levels (Sausmarez, 2012). Security concerns experienced from 2011 weighed heavily on the sector, with 2015 marking the fourth consecutive year of declining visitor arrivals and earnings. However, the industry has shown impressive recovery with 2019 recording Ksh.164 billion (USD1.64 billion) in revenue as illustrated in Figure 1.5.

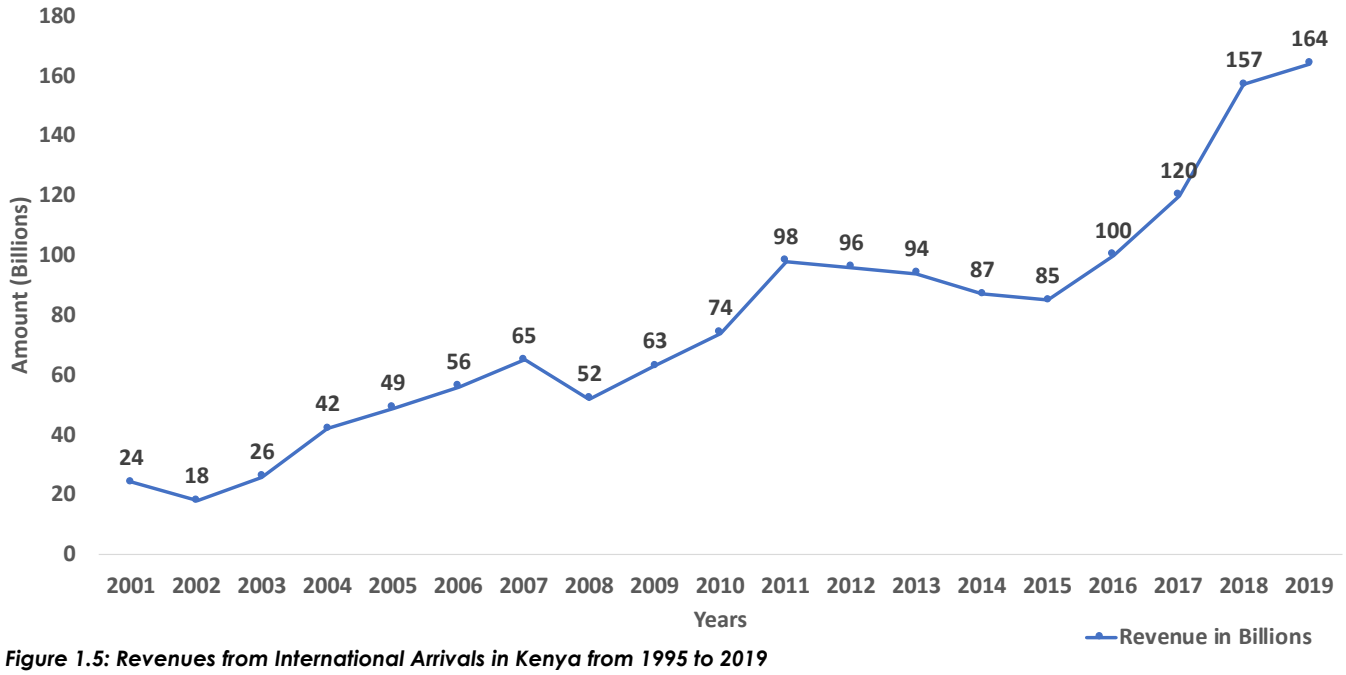


Figure 1.5: Revenues from International Arrivals in Kenya from 1995 to 2019

Source: Adapted from Census and Economic Information (CEIC, 2020)

There has been consistent growth in the industry since 2015. According to the Ministry of Tourism and Wildlife (GoK, 2019) this growth was driven by a number of factors as shown in Table 1.1.



Table 1.1: Factors Contributing to the Recent Growth of Tourism Industry in Kenya

S/No.	Factor	Contributing Factors
1.	Political Stability	• National reconciliation.
2.	Improved security situation	• Government investment in security. • Improvement of security situation in Somalia reducing threat on Kenya.
3.	Growth in the aviation sector	• Improvement of services at Jomo Kenyatta International Airport. • Direct flights from Nairobi - New York. • Air France made a comeback flying 3 times per week. • Tui Fly charter airline started flying from Netherlands and Belgium to Miami. • Qatar Airways, Doha – Mombasa
4.	Investor confidence	• Kenya improved from No. 92 to No.80 in ease of doing business. – World Bank. • Kenya has a total of 68 global hotel brands. • Nairobi ranked 3rd on the continent after Lagos and Abuja in the hotel pipeline report.
5.	Withdrawal of Travel Advisories	• USA lifted their blanket travel advisories. • UK similarly has only highlighted some locations that its citizens should not visit.
6.	Visits by Foreign Dignitaries	• There were several prominent visitors in 2018.
7.	Open border policy	• The open border policy for travelers from African countries - visa on arrival.
8.	Revitalized marketing efforts	• Branding partnership with Kenya. • Partnership with Kenya Railways (KR). • Branding of Equator crossing points. • Digital marketing. • Global Campaigns.
9.	Hosting of International Conferences	• 1st ordinary session of the African Union Ministerial Sub-Committee on Tourism. • 79th International World SKAL Congress. • Sustainable Blue Economy Conference. • Africa Hotel Investment Forum (AHIF).
10.	Growth in Shared Economy	• Expansion of Airbnb.
11.	Africa Open Skies	• The Single Africa Air Transport Market (SAATM). • 2018 arrival figures showed marked growth in arrivals from other African countries (GoK, 2019).



1.5 COVID-19 PANDEMIC

Although the tourism industry has shown great resilience to major shocks over the years, COVID-19 emerges as one of the greatest challenges facing the world today. The outbreak of COVID-19 presents the tourism sector with a major and evolving challenge, which is causing worldwide panic whose duration and scope is still unknown (UNWTO, 2020a). Tourism is currently one of the most affected sectors worldwide. The spread of COVID-19 has particularly focused attention on the globalized nature of the international tourism and how the sector may be affected by its spread (Deegan, 2020). The UNWTO has emphasized the need of 'putting people and their wellbeing first' through the slogan 'by staying home today, we can travel tomorrow' (UNWTO, 2020a).

1.5.1 Impact of COVID-19 on the Travel and Tourism Industry

COVID-19 has spread to all habitable continents of the globe affecting many more economies than other health challenges such as the Severe Acute Respiratory Syndrome (SARS), which was identified in 2003. Despite the mortality rate of 3.3% resulting from COVID-19 being lower than other recent outbreaks (such as SARS at 9.6%), the virus has heavily affected the global economy in a major way mainly due to a longer incubation period and a high infection rate (Cytonn, 2020). The domino effect of Covid-19 has a massive impact, wiping out entire economic sectors (WTTC, 2020d). Table 1.2 summarizes some of the key impact on the sector.

Table 1.2: Impact of COVID-19 on the Tourism Industry

S/No.	Reference	Type of Impact	Description of Impact
1.	UNWTO (2020b) 27.3.2020	Tourism growth	• UNWTO estimates that in 2020 global international tourist arrivals could drop by 60% to 80%.
2.	World Travel and Tourism Council WTTC (2020a)	Global lockdown	• One million jobs a day are lost globally in Travel and Tourism owing to the pandemic.
3.	WTTC (2020b)	Impact on cruise lines	• Cessation of cruise lines.
4.	WTTC (2020c)	Impact on accommodation	• Vast closure of hotel.
5.	WTTC (2020d)	Impact on air transport	• Suspension of the majority of international and domestic airline flights. • 'Domino effect' hitting huge numbers of suppliers worldwide.
6.	The International Air Transport Association (IATA) IATA (2020b)	Financial loses in air transport	• Predict global revenue loss for the passenger business of $113 billion in 2020.

The impact of the COVID-19 on companies is already global with cancellations and postponement of trips, public events, temporary employment adjustments, and falls in income. The WTTC has warned that it is estimated that COVID-19 pandemic could cut 50 million jobs worldwide in the travel and tourism industry and that once the outbreak is over, it could take up to 10 months for the industry to recover (WTTC, 2020b). Around 850,000 people travel each month around the world, equivalent to a $3.4 billion monthly contribution to the world economy. The equivalent to a loss of three months of global travel in 2020 could lead to a corresponding reduction in jobs of between 12% and 14% (WTTC, 2020c).

UNWTO has revised its 2020 prospects for

international tourist arrivals to a negative growth of 1% to 3%, translating into an estimated loss of US$ 30 to US$ 50 billion in international tourism receipts. Prior to the COVID-19 outbreak, UNWTO predicted a positive growth of 3% to 4% for 2020 (UNWTO, 2020b). This figure might change depending on the spread and magnitude of the infection.

By sector, airlines and cruise ships are more impacted than hotels. Airlines have reduced their flight schedules and offered waivers for rescheduling and cancellation fees. Despite offering cheaper flights, few travelers have taken advantage of the bargains. The International Air Transport Association (IATA) estimates that the industry could lose up to US$113 billion in revenue in 2020 due to the pandemic (IATA, 2020a). Travel restrictions resulting from the containment of COVID-19 has made the air transport get deeper into the crisis.

The cruise industry is also particularly threatened by the COVID-19 outbreak. Older people and those with underlying health conditions, have been advised to avoid the use of cruise ships, since they present an increased risk of infection. Tight quarters and poor ventilation, which can spread virus particles to other rooms, make cruise passengers more susceptible to infection than they would be in other environments (Vox, 2020).

According to the Global Association of the Exhibition Industry (UFI), the impact that trade show postponements and cancellations are having for both the exhibiting companies as well as for the trade show industry around the world will result to huge loses. These loses include at least USD 145 billion of contracts that have not been concluded as planned for the second quarter of 2020. In addition, USD 88.2 billion of total economic output will not be generated related to the exhibition industry by the same period (UFI, 2020).

1.5.2 Impact of COVID-19 to Kenya

Africa remains the least affected continent by the COVID-19 outbreak. To slow the spread, most governments across the continent are taking the unprecedented steps of stopping international travel. The cancellation of major international conferences slated for early 2020 over fears of COVID-19 has dealt a major blow to the tourism sector, as depicted in Table 1.3.

Table 1.3: Impact of COVID-19 Pandemic on Travel and Tourism Industry in Kenya

S/No.	Reference	Type of Impact	Description of Impact
1.	Cytonn, (2020) Feb – March 2020	Global lockdown limit travel	• Tourism is facing hard times due to lockdowns in major economies where tourists originate from
2.	Cytonn, (2020) Feb – March 2020	Aviation sector heavily affected	• The lockdowns have seen a reduction in revenues to the aviation industry which also greatly contributes to the tourism sector
3.	Cytonn, (2020) Feb – March 2020	MICE sector impacted by cancellation of gatherings	• The hospitality industry specifically the Meetings, incentives, conferences and exhibitions (MICE) had been affected because of travel cancellation as well as the 30-day ban on public gatherings
4.	Daily Nation (2020a) 13th March 2020 Cytonn (2020)	The Nairobi Securities Exchange (NSE), was hit as soon as the first case of COVID-19 was reported in Kenya.	• NSE20 index was halted on 13th March 2020 after dropping by more than 5%. • The situation was made worse after investors panicked and made indiscriminate sale of shares. • The total market capitalization shrunk by Sh120 billion. • Many foreign investors, who often purchase blue-chip stocks, have been selling their equity holdings to purchase gold and fixed income securities due to the much uncertainty in the market
5.	Daily Nation (2020a) 16th March 2020	Leisure activities stopped	• Police officers stop traders and the public from accessing Jomo Kenyatta public beach in Mombasa and other leisure facilities following the GoK ban on public gatherings.

1.5.2.1 Impact of COVID-19 on the Aviation sector in Kenya

The sector most adversely affected by COVID-19 in travel and tourism is the aviation sector. The outbreak of the virus has put a clear focus on just how globalized and interconnected economic activity has become. On 25th March 2020, Kenya banned all international air travel (Ministry of Health [MoH], 2020a).

By 11th March, 2020, airlines in Africa had incurred up a combined $4.4 billion in losses (The Eastern African, 2020). Presenting an analysis of possible loss trajectories for the region, Muhammad Al-Bakri, IATA's Vice-President for the Middle East and Africa revealed that Kenya was likely to take the brunt of losses in Eastern Africa with financial analysis conducted on 11th March 2020, indicating that passenger volumes could reduce by 622,000. Associated revenue losses could reach $125 million while 36,800 jobs would also be at risk. Any further escalation in the crisis could see passenger volumes fall by 1.6 million and $320 million in lost revenues (The Eastern African, 2020). Various players across the globe are warning that the virus and the travel advisories that have come with it could plunge the global economy into a recession (Daily Nation, 2020a).

1.5.2.2 Impact of COVID-19 on the Hotel Sector in Kenya

Within the country, some of the first destinations that were heavily affected were the North Coast areas of Malindi and Watamu in Kilifi County, which are preferred destinations for Italian tourists. This resulted from cancellation of flights from Italy in early March 2020. Although the pandemic came during the low tourist season in Kenya, the hotel sector has experienced an abrupt and unprecedented drop in hotel demand that has led to closure of several hotels as a result of the measures taken by different governments in shutting down their borders in an attempt to lock out the virus and slow down transmission. Consequently, some hotels have sent some staff on leave. Potential tourists are more likely to adopt a "wait and see" approach before booking any trips as the crisis unfolds. The government of Kenya gave a directive for passengers flying into the country to proceed on compulsory 14-day quarantine from 23rd March, 2020. The Ministry of Tourism and Wildlife has held many consultative meetings with industry stakeholders to work on measures to be taken and a possible recovery plan.

1.5.2.3 Impact of COVID-19 on the Meetings, Incentives, Conferences and Exhibitions (MICE) Sector

Kenya's MICE tourism segment has been on the rise. In October, 2019, the Ministry of Tourism and Wildlife inaugurated the National Convention Bureau (NCB), as a state agency charged with promoting Kenya as a preferred destination for business events and whose main purpose is to increase the number of events, conferences and meetings held in Kenya.

MICE contributed 13.5 percent of the total 2,048,834 international arrivals in 2019, where at least 276,592 visitors participated in meetings and business. The sub-sector remains key in Kenya tourism receipts which last year grew 3.9 percent to KSh163.56 billion (The Kenyan Wall Street, 2020).

Generally, more than 13,000 meetings are held annually in Kenya. Most of these are small-scale, domestic meetings totaling to around 49.9%. Corporate or business meetings make up 17.9%. Non-Governmental Organizations or Community Based Organizations meetings consist of 10.8%, while international conferences total to 6.2%. Per capita direct spending for events lasting 2-5 days is estimated to Ksh.388, 617 for international events and Ksh.70, 970 for domestic events. Further, according to International Congress and Convention Association's (ICCA) report of 2018, Africa hosted 434 meetings compared to the world total of 12,951 meetings. This accounts for 3.4% share of the global MICE market. Kenya's MICE sector held 31 meetings, which represents only 0.23% of the global MICE market but takes a significant fourth position in Africa (after South Africa, Morocco and Egypt) based on number of international meetings held (ICCA, 2018).

Due to COVID-19, on 12th March, 2020, the Government issued a travel advisory to all Kenyans to avoid non-essential travel to high-risk countries for conferences or meetings where

more than 15 people would be gathering. Further, on the same day, the country banned all major public gatherings after confirming the first case of COVID-19 in the country. Following this, and due to the spread of the virus, several important events have been cancelled in the country. Key among the activities included the annual Magical Kenya Open golf tournament that was scheduled to take place between 12th March and 15th March 2020 at the Karen Country Club. Kenyatta International Convention Centre (KICC), also called off two major conferences and four exhibitions of international standard. The conferences include the Next Einstein Forum 2020 Global Gathering (10th to 13th March, 2020) and the 4th Pan African Youth Conference (24th to 26th March, 2020). Affected exhibitions include the Oil and Gas Expo, Build Expo, Auto Expo and the China Trade Week for this year. Another major event that was cancelled at the last minute was the 63rd Airport Council International (ACI) from 14th to 20th March, 2020, in Pride Inn Paradise Beach Resort and Spa in Shanzu.

1.6 MEASURES TAKEN TO COMBAT COVID-19

1.6.1 Measures Taken by the World

The tourism sector, like no other economic activity with social impact, is based on interaction amongst people. UNWTO calls upon the sector and travelers to address the challenge posted by COVID-19 with sound judgment and proportionate measures. Against a backdrop of travel restrictions being introduced, UNWTO underscores the importance of international dialogue and cooperation and emphasizes the COVID-19 challenge also represents an opportunity to show how solidarity can go beyond borders (UNWTO, 2020a). WTTC has been calling on governments to remove or simplify visas wherever possible, cut travel taxes and introduce incentives once the epidemic is under control. WTTC also encourages flexibility in the sector, so that travelers can postpone and not cancel their plans (WTTC, 2020a). Table 1.4 indicates the measures that have been taken so far by the world to counter the impact of COVID-19.

UNWTO has continually guided the tourism sector's response on several levels by cooperating closely with the WHO, and lead UN agency in management of the outbreak. Besides, the organization in liaison with WHO has increasingly ensured that health measures are implemented in ways that minimize unnecessary impact on international travel and trade. Furthermore, UNTWO has stood in solidarity with affected countries. In addition, it has emphasized tourism's proven resilience and by standing ready to support recovery (UNWTO, 2020b).



Table 1.4: Measures taken by the World against COVID-19

S/No.	Reference	Description of The Measure
1.	WTTC (2020d)	WTTC has called for countries to urgently do more to intervene to make clearer how businesses can access potentially life-saving loans, and tax breaks, to prevent them from imminent collapse.
2.	WTTC (2020d)	Governments to protect the salaries, incomes and jobs of the millions of people who are at risk
3.	WTTC (2020d)	Governments to extend vital, unlimited interest-free loans to provide liquidity to large and small travel & tourism businesses to prevent them from collapse
4.	WTTC (2020d)	Countries to waive or remove all dues, taxes or fiscal charges for 12 months that affect cash flow which can be critical to businesses survival.
5.	UNWTO (2020b)	UNWTO has stressed the importance of international dialogue and cooperation. This shared challenge also presents the global community, including the tourism sector, to work more closely together and show that solidarity can go beyond national borders
6.	UNWTO (2020b)	UNWTO will ensure, with who, that health measures are implemented in ways that minimize unnecessary impact on international travel and trade
7.	UNWTO (2020b)	Countries to stand in solidarity with affected countries
8.	UNWTO (2020b)	UNWTO emphasizes tourism's proven resilience and by standing ready to support recovery.
9.	UFI (2020)	Governments to secure the future of exhibition sector through imminent subsidy and credit programmes. Their investments now will pay off extremely well. We will build and operate the marketplaces and meeting places for all the sectors and industries to meet and do business after the pandemic - our industry provides the fastest of all fast tracks to any economic recovery. Many of MICE facilities worldwide are supporting the emergency response to the crisis in their respective cities, building temporary shelters and installing beds in case local hospitals are unable to cope with demand.

Similarly, WTTC has urged governments to adopt policies for a "prompt" recovery of the sector. The policies include easing of fiscal policies such as travelers' taxes and the introduction of incentives that ensure business continuity; relaxation of unnecessary barriers at ports and airports; simplification of visa rules and increasing budgets for promoting travel destinations (WTTC, 2020b).



2 LITERATURE REVIEW

2.0 INTRODUCTION

This chapter provides a comprehensive summary of researches, press statements and opinions of key personalities in the realm of the tourism industry. It critically analyses the impact of COVID-19 crisis on the tourism industry, the measures that have so far been taken within the industry and the innovative recovery strategies that will offer solutions to the current crisis faced by the various tourism sectors in Kenya. While the health of those affected by the virus is clearly of paramount concern, academicians, tourism business owners, consumers, and the Kenyan government must prepare for the pandemic's effects to ensure that the country emerges from the crisis stronger than before.

2.1 NATURE OF CRISES WITH EFFECT ON TOURISM IN KENYA

A review of the literature on tourism and crisis suggests that economic and financial crises receive the most research attention, with these crises events often being linked to other events such as terrorism and increased energy costs (Hall, 2010). Discourse on crisis in tourism raises fundamental concerns about the way that the notion of crisis is conceptualized and what constitutes normality. Various crises have affected Kenya over the years. While some of the crises are found within Kenya, some of the crises have occurred elsewhere, however due to association and the nature of connectedness within the travel and tourism sector, such far away crises have also impacted on Kenya's tourism sector. A highlight of some of the crises that have impacted on Kenya's tourism industry over time is provided in Figure 2.1.

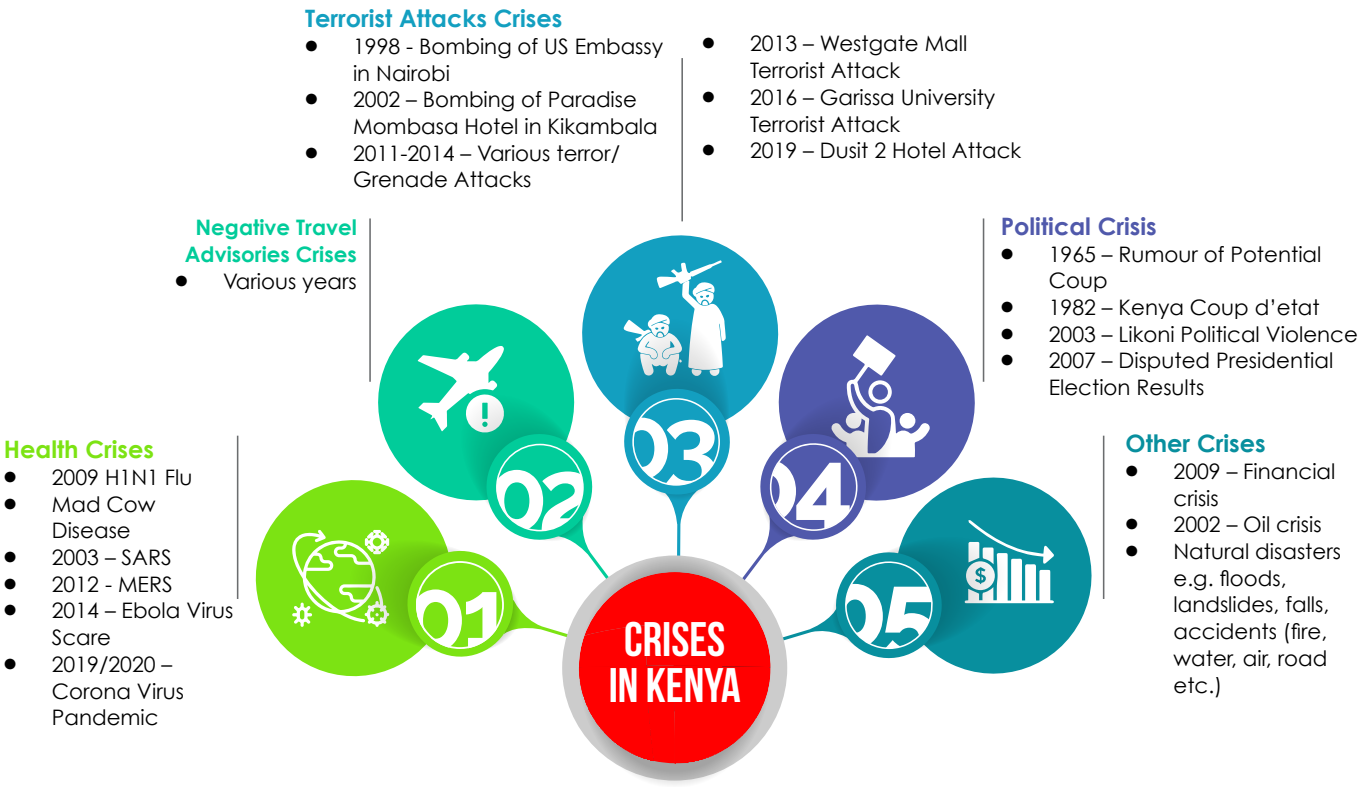


Figure 2.1: Crises with Effect on Tourism in Kenya

2.2 EFFECTS OF PAST CRISES ON TOURISM

The crises that have affected Kenya in the past have had varying effects on its tourism industry. This is reflected in Kenya's tourism performance over time, with dips in the year after major crisis. In some instances, the crises have had mild effects on the tourism industry. The most notable effects on the tourism industry have been associated with:-

i. **Reduced arrivals and Visitation** - Reduced arrivals from international visitors as well as reduced visitation to Kenya's tourism attractions and facilities.

ii. **Image Crises** – The image of the destination is always tarnished especially from crises that occur within Kenya. For crises that occur outside Kenya, there is always negative image by association, where Kenya is tied into the larger area image where the crisis is occurring. A case in point is the Ebola Virus scare in 2014 in West African Countries.

iii. **Effect on Business** – There is always negative effect on business.

iv. **Low Tourism Revenue** – Tourism receipts in periods after the crisis have always taken a dip.

v. **Reduced employment** – Employment has always been affected by the crises given that that there are few arrivals and visitation to tourist facilities and attractions is curtailed.

vi. **Loss of life and Property** – In some sad instances, crises have led to loss of life and property which impact negatively on the surviving family and members of staff in case of loss of life and investment climate.

2.3 MITIGATION MEASURES DURING THE PAST CRISES

Despite the numerous crises that have impacted on Kenya's tourism industry, response after crisis has always led to revamping of the sector leading to growth which is reflected in increased arrivals and patronization of tourism attractions and facilities over the years. Some of the measures that have been put in place in the past include:-

i. Budgetary Support – The Kenya Government has always supported efforts to revamp of the sector through budgetary support after crises negatively affect the tourism industry. A case in point was in 2008, when the Government spent over KSh 800 Million to publicize Kenya's tourism products and services in leading media houses across the world. The resultant effect was an increase in tourism arrivals from 1, 203, 200 to 1, 490, 400 visitors and earnings from 52.7 to 62.5 in 2008 and 2009 respectively.

ii. Successful Tourism Promotion – The Ministry responsible for Tourism has also engaged stakeholders in successful tourism promotion campaigns that have seen visitors and investors gain confidence in Kenya's tourism sector leading to recovery of the sector after crisis.

iii. Other strategies have been diversification of source markets; flexible VISA regimes; bidding for high profile conferences, improvements in the aviation sector and heightened security among others.

2.4 2020 COVID-19 CRISIS

2.4.1 What is COVID-19 disease?

COVID-19 is a novel respiratory disease caused by Severe Acute Respiratory Syndrome Coronavirus-2 (SARS-CoV-2) which is highly contagious and it is mainly spread from person-to-person. SARS-CoV-2 is a new strain of coronavirus that has not been previously identified in human beings. The COVID-19 spreads primarily through droplets of saliva or discharge from the nose when an infected person coughs or sneezes, so it is important that everybody practice respiratory etiquette (Ministry of Health, 2020a).

2.4.2 Comparisons with Other Pandemics

In terms of severity it was deemed necessary to compare COVID-19 to SARS (2003). For SARS there were 8,437 cases and 813 deaths. The fatality rate was 10%. When comparing COVID-19 to MERS (2012) outbreak, there were 2,494 cases and 858 deaths as a result of MERS (2012). The fatality rate was 34.4%. For COVID-19, the impact though not adequately captured, since first being identified in late 2019 in the Wuhan region of China, has spread to over 200 countries around the world, with a fatality rate of 4.6%. As of 31st May 2020, here are some of the key details of COVID-19 pandemic globally:

1. Over 5.9 million cases have been confirmed.
2. Over 360 thousands deaths have been recorded.
3. Over 200 countries impacted.
4. Over 3 million cases have recovered.
5. Over 3 million cases are active of which 98% are in mild condition and 2% in critical/ serious condition.

Source: WHO (2020)

2.4.3 First Case and Patterns of COVID-19 in Kenya

The Ministry of Health in Kenya confirmed the first COVID-19 case in Nairobi on the 12th March, 2020, (Ministry of Health, 2020b). The case was a Kenyan citizen who travelled back to Nairobi returning from the United States of America via London, United Kingdom on the 5th March, 2020, and she has since recovered and released from the hospital.

On 29th March, 2020, Health Cabinet Secretary, Hon. Mutahi Kagwe announced that four new cases of Covid-19 had been confirmed in Kenya, which brought the total number of confirmed cases in the country to 42 (Kenyans, 2020). Of the four cases; one was a Kenyan and three were foreigners from America, Cameroon and Burkina Faso. On 28th March, 2020, it was reported that Nairobi County was still leading with 28 confirmed cases followed by Kilifi County with six, Mombasa County with two and Kwale and Kajiado Counties with one each. Seven more people had tested positive for the new COVID-19. They were four Kenyans, two Congolese and a Chinese citizen. Three of them were female and four male. The Ministry of Health directed that starting 29th March, 2020, people who arrived in the country from overseas would undergo mass testing. As part of steps to prevent spread of the deadly virus, Kenya enforced an indefinite 7pm to 5am curfew starting on 27th March, 2020.

In addition to the curfew, on 6th April, 2020, there was partial lockdown of the Nairobi Metropolitan Area; Mandera, Kwale, Kilifi and Mombasa Counties for an initial 21 days, which was further extended by another 21 days on 24th April, 2020. As of 31st May, 2020, in Kenya, the known cases of COVID-19 were 1,962, with 474 recoveries and 64 deaths.

2.5 IMPACT OF COVID-19 ON THE TOURISM INDUSTRY IN KENYA

Kenya started the year 2020 with a positive economic outlook, with the GDP growth expected to reach 6% in 2020 and stay at this level in 2021, spurred by private consumption and good performances in the industrial and services sectors (The World Bank Group, 2020). However, the COVID-19 pandemic has had significant effect on the country's tourism industry, consumer and business sentiment are all disrupted.

2.5.1 Consumer Confidence Dropped Over COVID-19

KASI provides consumer insights for business promotion in Africa. Each month, they survey thousands of average Africans from over 10 countries and turn survey data into insights and measures that inform decision makers and investors (KASI, 2020). Consumer confidence (KASI CCI) dropped in February 2020 over COVID-19 concerns and the economic implication of the pandemic in Africa; the index dropped 6 points to +3.

Both the sub-index of current economic conditions and of future expectations dropped 4 and 6 points respectively.

Despite the low prevalence of cases in Africa, they decided to launch a COVID-19 survey in 7 countries they cover each month and found that 85% of the people surveyed are concerned about COVID-19 with 60% of the respondents citing that they are very concerned about the COVID-19. Incidentally, respondents in countries where individuals have been tested positive for the COVID-19 are also the most concerned. In Kenya, 69% of the respondents stated they were very concerned about COVID-19 which is not surprising given the recent events in the country where passengers from China were released in the country without going through quarantine.

2.5.2 Potential Price Increase for Imported Products

Some experts are warning of potential prices increase for products imported from China and sold in markets across Africa as a result of the COVID-19 outbreak (KASI, 2020). As the pandemic persists and the world fight to contain the virus, shortages are bound to increase and prices will likely go up. It is too early to tell how much price will go up by or how the consumers in Africa will adjust to the new norm. We are seeing a signal from our consumer sentiment index with the purchasing power (inflation forecast) sub-index dropping down signaling higher inflation in the future.

By 16th March 2020, more than 37 cargo ships that supply goods to Kenya and the rest of the region had failed to dock at the Mombasa port, having cancelled their arrivals. This is likely to see a surge in prices of consumer goods in the region. A number of vessels, which made a call at the port in February 2020, also reported blank arrivals. There are at least another 102 whose fate was unknown by 16th March 2020. If they follow the same path of blank arrivals, then the supply chain disruption in East Africa will move to critical (Daily Nation, 2020a). Available figures indicate that China is Kenya's largest source market accounting for about 20% of Kenya's import requirements (Kenyan Wall Street, 2020).

2.5.3 Hotels and Restaurants Ordered to Stay Closed

The COVID-19 pandemic has left many businesses globally struggling to stay afloat. The tourism industry has been largely affected following lockdowns and travel restrictions in various countries. The hospitality industry has also taken a big hit. Restaurants have been ordered to stay closed, save for take-out services (The Standard Group PLC, 2020). Some hotels have resorted to shutting down and suspending operations due to a reduction in number of guests at the facilities. Some of the hotels that have closed down include: Serena Hotels, Weston Hotel, Enashipai Resort and Spa, Ole-Sereni Hotels, DusitD2 Nairobi, Sopa Lodges, White Rhino Hotel, Leopard Beach Hotel, Diani Reef, The Maiyan and many others are following suit every day.

2.5.4 Shutting Down Borders to Lock Out Virus and Slow Down Transmission

The tourism industry is taking the biggest hit given the measures already taken by the government in shutting down its borders in an attempt to lock out the virus and slow down transmission. The virus now promises to derail the impressive recovery in the sector which was just shrugging off the impact of terror threats (Daily Nation, 2020a). The Economic Survey 2019 shows that tourism earnings increased by 31.3% to Sh157.4 billion in 2018. The number of international arrivals increased by 14 per cent to two million people in 2018, while hotel bed occupancy increased by 20.1% to 8.6 million, of which 52.1% were occupied by residents, indicating the growing importance of domestic tourism. But the lockdown and various actions geared at stopping the transmission of the virus will have the consequences of reversing these gains.

2.5.5 Loss of Finances and Business Revenues

Kenya Airways is taking the biggest hit in Kenya's aviation space, with most countries locking out airlines from countries that have reported cases of COVID-19. Kenya Airways estimates that it is losing at least Sh800 million a month, noting that the situation could change more dramatically in coming days as more restrictions in global travel come (Daily Nation, 2020a). According to the Daily Nation, China is arguably the largest trading partner with Africa and Kenya and, therefore, its significance cannot be downplayed. China is also a key cargo origin and a main feeder to regional freighters. On 16th March 2020, Jambojet suspended its services to Kigali, Rwanda and Entebbe, Uganda with immediate effect. Already, a number of airlines have started to revise their profit forecasts for the year, factoring in the impact of the virus on their revenues. Fixed costs, such as, rent, electricity, insurance, internet, marketing/ advertising costs, will majorly affect hotels' bottom line negatively. The below-average revenues of many hotels will be exceeded by the expenditure (Standard Media, 2020).

2.5.6 Restriction of Travel among International Travelers

Italy and the rest of Europe are some of the most important nations to Kenya's tourism industry and the ban on travel has seen hundreds trapped here and thousands others unable to travel (Daily Nation, 2020a). Tourism in Kenya, particularly the hotel industry, has been hit the most owing to lockdowns and travel advisories in nearly all parts of the world that have led to cancellations of bookings and reservations (Standard Media, 2020). Owing to booking cancellations, hotels have suffered low occupancy resulting in dismal accommodation revenue. Due to the virus scare, the majority of Kenyans have shied away from eating out, drinking out, and attending conferences (Standard Media, 2020). These are key revenue centers in a hotel setup; their lack of utilization will lead to little or no revenue. Many hotels, restaurants, pubs, cafes, meeting centers have been deserted.

2.5.7 Downsizing and Job Loss

As a result of low occupancies, one of the obvious decisions by management of hotels will be to lay off casual workers and to suspend the renewal of contracts expiring during this period. Loss of jobs will affect families directly as the breadwinners are sent packing (Standard Media, 2020).

2.5.8 Unpaid Creditors

With insufficient cash flow, hotels will not be able to meet their financial obligations, especially creditors, among other things. This will directly have a negative impact on the creditors' businesses and an indirect impact on other parties, depending on the creditors (Standard Media, 2020).

2.5.9 Wastage and Spoilage

In as much as Kenya was alert and ready to employ recommended global measures of dealing with the pandemic in the eventuality it hits her, nobody expected the virus to catch up with us this soon. Procurement of edibles, perishables, among other delicate foodstuffs, had taken place with the hope of selling them to a projected number of customers. The low business volume has led to spoilage of perishables and other food items that cannot be preserved (Standard Media, 2020).

2.5.10 Government Actions to Counter COVID-19 Outbreak, With Implications on Tourism

Various actions to counter the corona virus have a direct impact on tourism. The Daily Nation (2020a) tracked how COVID-19 is affecting various actors in the economy and some of the findings are presented in Box 2.1.

Box 2.1: Government of Kenya Actions to Counter COVID-19 Outbreak

16th March, 2020 to May 2020

- Cessation of all movement by road, rail or air in and out of: (a) the Nairobi Metropolitan Area; and (b) the counties of Kilifi, Kwale and Mombasa.
- Nationwide curfew from 7:00 p.m. to 5:00 a.m., in the entire territory of the Republic of Kenya.
- Police officers prevent traders from setting up for business at the Jomo Kenyatta Public Beach in Mombasa.
- Nyeri County joins other counties to stop nightlife activities after it ordered all bars and nightclubs to close by 10pm.
- Museum galleries closed until further notice.

13th March, 2020

- Head of public service, Joseph Kinyua, suspends all non-essential travel to any destination outside Kenya for all government officials, whether on official government business or private business.
- Ambassadors and high commissioners serving in Kenya's missions abroad to represent the government on international engagements.
- Health Cabinet Secretary, Mutahi Kagwe, suspends all public gatherings, meetings and events for 30 days.
- Health Cabinet Secretary announces a 30-day ban on all conferences of international nature and those that have more than 15 international participants.
- Kenya Open golf tournament is suspended until further notice.
- Kenya Airways suspends flights on its Rome-Geneva route in response to developments following the COVID-19 outbreak.

28th February, 2020

- China Southern Airlines, which mostly carried Chinese expatriates, workers and traders into Nairobi, was also forced to suspend flights to Kenya following public uproar over COVID-19 fears. The airline had one flight a week and each flight brought in about 200 passengers.

31st January, 2020

- Kenya Airways suspends services to and from Guangzhou, China.

2.6 MEASURES TAKEN BY THE TOURISM INDUSTRY TO COUNTER COVID-19 CRISIS IN KENYA

Though Kenya remains one of the regions with the fewest cases, the number of African countries affected has increased over the past week. As of this writing, nearly 8500 cases have been reported in 50 countries, concentrated in northern Africa and South Africa (The Brookings Institution, 2020). While the relatively low number of cases on the continent so far is good news, African policymakers including Kenya should not be complacent. They should instead use this window of opportunity to take decisive steps to protect their citizens and economies from the pandemic. To achieve these goals, Brookings Institution (2020) recommends a three-step approach: contain the spread of the virus; swiftly treat identified cases; and cushion the economy from the effects of the pandemic.

2.6.1 Containing the Spread of the Virus

The Government, through the Ministry of Health, is doing the best to sensitize Kenyans and to inform them about emerging and suspected cases (Standard Media, 2020). Because Kenya and many African countries have relatively weak health care systems, proactive measures to prevent the spread of the virus will be critical (The Brookings Institution, 2020). Kenya Airways among other tourism organizations stepped up campaigns to educate the public on best practices, including promoting good hygiene and social distancing, discouraging large public gatherings, and encouraging employers to protect the jobs of employees who require quarantine or treatment. Campaigns should elicit the help of religious and civil society leaders for maximum effect.

2.6.2 Suspension of All International Travel

The Government of Kenya issued a directive that requires all incoming and outgoing international passenger traffic to and from Kenya to cease from midnight of 25th March, 2020. To comply with this directive, Kenya Airways temporarily suspended all international services effective midnight 25th March, 2020 until further notice (Kenya Airways, 2020). They will continue to operate cargo flights particularly and are available to offer emergency services or much needed supplies. Kenya Airways has been working hard to help their passengers return to their homes given the increased travel restrictions across the world. In the meantime, the domestic flights to Mombasa and Kisumu remain operational. Due to the ongoing uncertainty over travel plans, Kenya Airways is offering a waiver on change fees on all fares excluding travel within domestic Kenya. This change gives customers the confidence to continue with travel plans even with the uncertainty of this situation.

2.6.3 Leaders in the Tourism Sector's Support for the Fight against the Scourge

The world all over is experiencing the greatest health emergency Corona Virus aka COVID-19. Almost all sectors that contribute to the economies have been affected. Tourism is one such economy that has been hard hit by the pandemic (Voyages Afriq Media, 2020). Leaders in the tourism sector have come out to show support for the fight against the scourge by encouraging travelers to heed to the UNWTO call to 'Stay Home for now and Travel Tomorrow.' KTB CEO Dr. Betty Radier said, the board is putting people first and sensitizing the tourism sector to ensure the necessary precautionary protocols are observed to curb and defeat covid-19 and will be happy to welcome the world back to Kenya when they travel tomorrow. 'We join the rest of the destinations in putting people first and taking all precautions to flatten the COVID-19 curve; key measures include washing hands, social distancing and self-quarantine for those who have recently arrived into the country or been in to contact with infected persons. The Kenyan tourism private sector has been in the frontline in securing both the safety of visitors and staff alike.'

Kenya's Cabinet Secretary for Tourism and Wildlife, Najib Balala, on 19th March, 2020 held talks with the United Nations World Travel Organization (UNWTO) executive council and other global tourism leaders. The meeting was aimed at coordinating the efforts of the tourism sector globally and collaborating in the light of the effects of the COVID-19 Pandemic. In a virtual meeting chaired by the UNWTO Secretary General, Zurab Pololikashvili, the leaders discussed the need to establish a joint action plan as a matter of priority (African Press Agency, 2020). The Cabinet Secretary noted that apart from creating awareness at this time, collaboration among all stakeholders would see tourism bouncing back to normalcy once the pandemic is contained.

2.6.4 Engaging UNWTO in Mitigating the Covid-19 Impact

The United Nations World Tourism Organization (UNWTO) in these challenging times has been engaging the WHO and other allied tourism organizations to look at ways of mitigating the impact on the tourism sector as well as urging governments to make tourism part of their recovery plans. The campaign essentially entreats citizens to stay home in order to help

curb the spread of the virus while planning to travel tomorrow (Voyages Afriq Media, 2020). The Kenya Tourism Board (KTB), the agency responsible for the marketing of the country has joined the campaign to sensitize the public about the challenging times and the importance of staying at home as advised but also use this time to plan and explore the unforgettable experiences of Kenya's tourism magic tomorrow.

2.6.5 Holding Meetings with the Frontline Staff and Private Sector Players

Businesses have been hit hard and this will have a major impact on the economy. Hotels must train their staff on the virus, how it spreads and how spreading can be curbed. The use of disinfectants during cleaning is of the essence. Provision of enough clean water, soap and sanitizer for staff and guests is paramount to fighting the pandemic. If the Covid-19 pandemic is not urgently resolved, there will be more loss of lives, businesses, and jobs. Hopefully, the pandemic will be resolved soonest possible (Standard Media, 2020).

The Ministry of Tourism and the Tourism Board have held several meetings with the frontline staff and private sector players to ensure that safety and WHO standard measures are adhered at all tourism facilities and points of entry (Voyages Afriq Media, 2020). This is also in line with the Ministry of Health directives in Kenya which the tourism sector is supporting.

2.6.6 Continuous Monitoring and Response through Integrated Approach

Kenya's Cabinet Secretary for Tourism and Wildlife, Najib Balala, while holding talks with the United Nations World Travel Organization (UNWTO) executive council and other global tourism leaders observed that "Addressing the multi-faceted impact of the pandemic demands an integrated approach across the world. When adequately supported with accurate and timely information, travel patterns will resume and tourism will rebound." He called for mobilization by key members to contribute to ways of mitigating the spread of COVID-19 as they put in measures for a recovery plan (African Press Agency, 2020). As destinations continue to put measures to handle the crisis, there is need to factor in recovery plans by involving key institutions such as the financial and research institutions.

2.7 INNOVATIVE RECOVERY STRATEGIES AND SOLUTIONS TO THE COVID-19 CRISIS AFFECTING THE KENYAN TOURISM INDUSTRY

2.7.1 Call to Embrace Innovation and Need for International Solidarity

UNWTO secretary general Zurab Pololikashvili explains the call to embrace innovation and need for international solidarity: "Tourism is the sector that has been hit the hardest by COVID-19. I call on all entrepreneurs and innovators with ideas that are developed and ready to be put into action to share them with us. In particular, we want to hear ideas that will help communities recover from this crisis, economically and socially, as well as ideas that can contribute to the public health response. Our response needs to be strong and united."

"I am deeply convinced that there is no other way to deal with global challenges, than with global responses." António Guterres, UN Secretary-General. The World Tourism Organization (UNWTO) on 25th March, 2020 proposed a step forward for Sustainable Development in a crisis situation, providing support to travelers, businesses and authorities. World Tourism Organization (UNWTO) is collaborating with World Health Organization (WHO) in launching "Healing Solutions for Tourism", an innovation challenge to help the tourism sector recover from Covid-19, where millions of jobs are at risk as the pandemic hits hard. The competition is now live and applications close on 10th April, 2020. In the face of an unprecedented challenge, the UNWTO, with the support of the WHO, calls on innovators and entrepreneurs to submit ideas that can be implemented immediately in destinations, businesses and

public health efforts to help the tourism sector mitigate the impact of the pandemic and kick-start recovery efforts. This competition should be replicated in Kenya spearheaded by the Ministry of Tourism and Wildlife to find ideas that can make a difference right away for destinations and tourism businesses.

2.7.2 Supply Customers with Updated Information

Due to Covid-19 developments, Kenya Airways is currently experiencing extremely high call volumes and are unable to respond to all of them on time. Their Contact Center is prioritizing flight re-bookings for guests who are scheduled to travel within the next 72hrs. This is aimed at providing the affected customers with updated information as early as possible hence; the customers make sure contact details are up to date on the Kenya Airways 'Manage My Booking' site, and encourage all guest to check their 'Flight Status' on upcoming travel due to the rapidly evolving schedule changes.

2.7.3 Share Lessons Learned and Assist Each Other

The Kenyan Tourism community must come together to collaborate, coordinate, share lessons learned, and assist each other to combat the pandemic. Until every county, business and human is safe, the country will not be safe. The outbreak should serve to highlight the extent to which the tourism sectors in the country are interconnected and interdependent and should be a call to strengthen Kenya's institutions and the governance system.

2.7.4 Area Event Calendars

Springfield-area event calendars, usually packed with spring activities, are instead filled with cancellations and postponements as the impact of the new COVID-19 intensifies (Springfield Business Journal, 2020). Tracy Kimberlin, Convention & Visitors Bureau's (CVB) president and CEO said, "There will be plenty of other cancellations. We're trying to get a handle on how many are being canceled." Kenyan event planners should adopt Area Event Calendars where groups provide notifications of postponement or cancellation decisions.

2.7.5 Setting aside Funds for Post Corona Recovery Initiatives

The Cabinet Secretary promised to set aside $3 million for post corona recovery strategy (Ministry of Tourism and Wildlife, 2020). He also promised to give $ 2million to the gazette the ministry's National Tourism Crisis Steering Committee, to aid in boosting the image of the destination.

2.7.6 Deal with the Many Travel Advisories

Tourism stakeholders in Kenya should request the government decision makers to be selective about who they allow to enter or leave the country rather than placing blanket bans on international travel. The request should be contained in a memorandum sent to the Kenyan government and shared with the Ministry of Tourism and Wildlife in meeting with hoteliers, tour operators, travel agents, and airline representatives.

2.5.7 Establish Draft Industry Cancellation Guideline

The Kenya Tourism Federation (KTF) has established a draft Industry Cancellation Guideline that takes into account that clients, unsure of whether they will lose their money, will not make forward bookings (Tourism Update, 2020). KTF's objective should be used to help the industry create a guideline policy to help those without one and help deliver a fair win-win position.

2.5.8 Strengthening of the Tourism Resilience Centre

Kenyatta University, while appreciating the Ministry's efforts in handling this crisis are glad that the Ministry of Tourism and Wildlife is spearheading the establishment of a Tourism resilience Centre in Kenya. The Centre will assist the country with preparedness, management and recovery from crises. The roles of the Centre will be: creating, producing and generating toolkits; develop guidelines and policies to handle the recovery process following a disaster; assist with preparedness, management and recovery from disruptions and/or crises that impact tourism and threaten economies and livelihoods; collate data generated from different organizations related to tourism industry; and network on knowledge generation and sharing with other relevant regional and international bodies (Kenyatta University, 2020).

2.5.9 Free-To-Attend Virtual Conference Open to All in the Tourism Industry

While the world works through stages of virus contact, contagion, containment and control, nothing is certain. Nothing, aside from that our world will never be the same again. Even before recovery can be ventured into, leaders must come together to identify: changes in our world and people - operationally, financially, and psychologically; where, when and how signs of recovery can be anticipated; the role of travel and tourism in accelerating momentum for recovery (Africa Press Office, 2020). On 7th April, 2020 Hospitality Tomorrow hosted a free-to-attend virtual conference from the safety of our own home or office. The participants gained from 6 hours of interactive, essential industry insights delivered by stellar lineup of global speakers, virtual exhibition and roundtables, and live face-to-face networking sessions.

Topics covered were: the economics of COVID-19, how to survive the greatest adversity of our time, the nine essential leadership behaviours needed in a crisis, the outlook to recovery, how to capitalize on the upturn when it comes and the new post-COVID reality. These discussions were moderated by the presenter of HARDtalk and conference chair, Stephen Sackur and Anita Mendiratta, Special Advisor to Secretary General, UNWTO (Africa Press Office, 2020). Hon. Minister Najib Balala, Cabinet Secretary, Ministry of Tourism and Wildlife, Kenya was among the selected speakers.

2.5.10 Formation of the National Tourism Crisis Steering Committee

In a virtual meeting chaired by the UNWTO Secretary General, Zurab Pololikashvili, members were urged to have a solutions-based approach, to remain resilient and make robust arrangements for business continuity amid the tough times (African Press Agency, 2020). His idea that a COVID-19 tourism crisis committee be formed, whose major focus will be on supporting destinations with information and collaborate on a rescue package plan for tourism markets should be replicated in Kenya. On this call, the National Tourism Crisis Steering Committee to deal with the impact of Covid-19 was established under the Ministry of tourism and wildlife.







3 RESEARCH METHODOLOGY

3.1 INTRODUCTION

This chapter details the research process that was followed in conducting the study. Specifically, the chapter gives a description of the research design, location of the study, target population, sampling techniques as well as sample size, study instruments, pre-testing of the instruments, data collection techniques, and data analysis plan.

3.2 RESEARCH DESIGN

Following the Covid-19 outbreak, the Ministry of Tourism and Wildlife through the National Tourism Crisis Steering Committee requested academia and industry practitioners to carry out a research study on the "Impact of COVID-19 on Tourism in Kenya, the Measures Taken and the Recovery Pathways". The study adopted a cross-sectional descriptive research design. The research design was chosen due to its effectiveness, low cost and it enables easy access to information (Cooper & Schindler, 2006). Consequently, a joint working team was formed. The team members comprised industry experts from the academia and practitioners within the country. Due to the infectious nature of the COVID-19 pandemic, the joint working team had to use the online and digital platforms that included emails, video calls and social media for communication and coordination of the process. The full list of the members and their affiliations is attached herein (Appendix 1). The joint working team was split into six groups and each was assigned sections to work on as follows:



3.3 STUDY AREA

The study area is Kenya, one of the countries in Africa which is located in East Africa Region. Kenya has 47 Counties and it covers 580,367 square kilometers with 47.6 million people. Kenya's capital and largest city is Nairobi. The study covered all Tourism Activities and Services listed in the Ninth Schedule of The Tourism Act, 2011 and government Agencies in the Tourism sector. These activities and services are illustrated in Table 3.1.

Table 3.1: Hospitality and tourism Areas/ Activities Affected by Covid-19

Affected Area/Issue	Issues to be addressed	Responsible Organization
Hospitality	▪ Suspected Cases (Guests/Employees) ▪ No. of visitors stranded in the country ▪ Hotel Rooms Cancellations ▪ No. of new facilities/companies opening ▪ Insurance payouts ▪ Effect on the "upstream/suppliers" and "downstream/marketers/intermediaries" partners ▪ Recovery Strategies	KAHC/KTF
Tour Companies/ Travel Agencies/Tourist service vehicle hire/ Balloon operators	▪ Suspected Cases (Guests/Employees) ▪ No. of visitors stranded in the country ▪ Tour Cancellations ▪ No. of new facilities/companies opening ▪ Insurance payouts ▪ Effect on the "upstream/suppliers" and "downstream/marketers/intermediaries' partners ▪ Recovery Strategies	KATO/KATA/KTB
Cruise Ships	▪ Suspected Cases (Guests/Employees) ▪ Port Calls Cancelled ▪ Recovery Strategies	KPA
Tour guides	▪ Suspected Cases (Guests/Employees) ▪ Number of closed/affected businesses ▪ Recovery Strategies	Kenya Tour Driver Guides Association-KTDGA
Security	▪ Number of general crime incidences (Compare to last three years same time) ▪ Number of specific tourism related crimes reported	NPS/ TPU
Tourism Industry challenges	▪ Endangered Growth of Tourism ▪ Tourism Value Chain negatively affected ▪ No. of Licensed facilities ▪ No. of new facilities/companies opening ▪ Analysis of Travel Demand (No of cancelled vs. postponed Trips) ▪ Effect on cost of holidays/trips ▪ Market recovery strategies ▪ Analysis of cost structure of destination to specific operators ▪ Analysis of destination access costs (maintain/reduce) ▪ Value of Supportive Public-Private Sector Partnership amidst the pandemic ▪ Learning from previous crises (/Oil prices/financial downturn/SARS/Terrorism/PEV/Pandemics)	MoTW/ KTF/KTB/TRA/ TRI
Conferences/ Meetings/ Conventions	▪ No. of conference attendees stranded in the country ▪ No. of Conference Cancellations ▪ No. of new conferences at a later date ▪ Recovery Strategies	KICC/NCB
Entertainment	▪ Suspected Cases (Guests/Employees) ▪ No. of leisure spaces accessible ▪ Event Cancellations ▪ No. of new entertainment facilities opening ▪ Insurance payouts ▪ Recovery Strategies	PERAK
Sports Tourism	▪ Suspected Cases amongst sports men/women (Guests/Employees) ▪ (Locals/Foreigners) ▪ No. of sportsmen stranded in the country ▪ Sports events Cancellations ▪ No. of projected sports events ▪ Insurance payouts ▪ Recovery Strategies	KFF/AK/Ministry of Sports, culture and Heritage/KTB
Tourism Revenues	▪ Revenues from Tourism industry (Compare for the same period for the last three years) ▪ No. tourism industry revenue defaulters ▪ Incentives/grants/waivers to the industry stakeholders ▪ Backward linkages and multiplier effects ▪ Recovery Strategies	KRA/CBK TRA/TF/KTB
Tourism and Hospitality Training	▪ No. of tourism and hospitality training institutions closed ▪ Effect on industrial attachment/internships ▪ Recovery strategies	MoE/NITA/TVETA/MoTW

3.4 TARGET POPULATION

The study targeted two cohorts for quantitative and qualitative data collection purposes. The 1st cohort (for quantitative data collection) comprised members of key tourism stakeholders including members of accommodation sector, attractions, destination management organizations, exhibition centers, travel agents, tour operators, event organizers, restaurateurs, air operators, and safari/drive guides. The targeted numbers in each category are presented in Table 3.2.

Table 3.2: Target Population

Table 3.2: Target Population

Category	Targeted Number
Accommodation Providers	70
Attractions	10
Destination management organizations	25
Exhibition centers	15
Travel agents	60
Tour operators	85
Event organizers	30
Restaurateurs	30
Air operators	5
Safari/drive guides	30
Total	**360**

The 2nd cohort (for qualitative data collection) comprised the following:

- 10 Chief Executive Officers (CEOs) of Tourism State Corporations.
- 11 CEOs' of Tourism Association.
- 47 officers of County Executive Committees (CECs)

The total number of interviews were 68. The tourism state corporations comprised Bomas of Kenya, Kenya National Convention Bureau (KNCB), Kenyatta International Convention Centre (KICC), Kenya Utalii College (KUC), Kenya Tourism Board (KTB), Kenya Wildlife Service (KWS), Tourism Finance Corporation (TFC), Tourism Research Institute (TRI), Tourism Fund (TF), and Tourism Regulatory Authority (TRA).

On the other hand, tourism associations comprised Kenya Association of Travel Agents (KATA), Kenya Association of Air Operators (KAAO), Kenya Coast Tourist Association (KCTA), Kenya Tourism Federation (KTF), Pubs, Entertainment and Restaurants Association of Kenya (PERAK), Kenya Association of Hotel Keepers and Caterers (KAHKC), Kenya Association of Tour Operators (KATO), Kenya Association of Women in Tourism (KAWT), North Rift Economic Block (NOREB), and Kenya Professional Safari Guides Association (KPSGA).

3.5 SAMPLING TECHNIQUES

The study used complete enumeration approach that involved systematically acquiring and recording information from the members in the target population.

3.5.1 Sample Size

The study undertook a census of the population by systematically acquiring and recording information from the association members and CEOs in the target population.



3.6 RESEARCH INSTRUMENTS

The study used questionnaires and interview guides to collect quantitative and qualitative data respectively. The questionnaires comprised close-ended and open-ended questions. The questionnaires were administered online to the hospitality and tourism agencies and associations in the target population. In-depth interviews were conducted with key informants in the tourism sector (see target population).

3.7 PRE-TESTING

A pre-test of the questionnaire and interview guide was conducted in order to assess the validity of the study instruments for their intended purposes. It involved administering the questionnaires to respondents to check if the questions are valid, reliable, appropriate, necessary or sufficient. The pretest was also used to establish the required timings required to complete the questionnaire and interview guides which were 20 and 60 minutes respectively. Pretest questionnaires were distributed to 20 respondents in tourism businesses across Kenya.

3.8 VALIDITY AND RELIABILITY

The validity and reliability of the data collection instruments were ascertained before actual data collection. To test the validity of the questionnaire and interview guides, content validity technique was used to ascertain the adequacy of the questions for the purpose of the study. This was ensured through expert reviews and judgment by the travel and tourism industry practitioners. Test-retest method was used to ascertain the reliability of the questionnaires.

3.9 DATA COLLECTION TECHNIQUES

The study collected primary and secondary data. Primary data were gathered using the questionnaires and interview guides. To distribute the questionnaire, the CEOs' of tourism associations and other tourism businesses were first notified of the study and its purpose through telephone calls and emails. Upon providing consent to participate in the study, they were requested to send an online version of the questionnaire to their members. Similarly, the CEOs' of tourism state corporations were notified of the study through telephone calls and emails. The interviews were completed through telephone. Nonetheless, interviews that were not completed through telephone calls were finalized via submission of filled interview guides to the principal researcher by the interviewees. The same procedure was used to collect data from the tourism CECs of County Governments in Kenya. Secondary data were gathered from published reports by international tourism bodies such as UNWTO, WTTC, IATA, GoK reports, Ministry of Tourism and Wildlife, and Kenya National Bureau of Statistics (KNBS). Secondary data was used to back-up primary data.

3.10 DATA ANALYSIS

Data analysis was carried out using descriptive and inferential statistical techniques. Tables and graphical presentations were used to present the data collected for ease of understanding and analysis. Qualitative Content Analysis (QCA) was used to analyze narrative data from interviews using NVivo (v.10)—a qualitative data analysis software for analyzing rich-text data.

3.11 LOGISTICAL AND ETHICAL CONSIDERATIONS

During the period of carrying out the research, there are certain considerations and obligations that the researchers had to fulfill that included obtaining permission from the Ministry of Tourism and Wildlife through the National Tourism Crisis Steering Committee as well as ensuring confidentiality and objectivity of information.





4 RESULTS AND DISCUSSIONS

4.1 INTRODUCTION

The purpose of this study was to determine the impact of COVID-19, the measures taken and the recovery pathways on the tourism industry in Kenya. The specific objectives of the study were:-

i. To analyze the impact of COVID-19 on the travel and tourism industry in Kenya.

ii. To examine the measures taken against COVID-19 in the travel and tourism industry in Kenya.

iii. To propose the recovery pathways in dealing with COVID-19 in the travel and tourism industry in Kenya.

iv. To recommend best practices in managing COVID-19 as a crisis in the travel and tourism industry in Kenya

To achieve these objectives, various tools were used to solicit for information on the effects of the COVID-19 and following are the outcomes from the various respondents.

4.2 RESPONSE RATE

A total of 360 questionnaires were issued to various tourism businesses. The number of questionnaires collected after fieldwork was 194, representing a response rate of 53.9%. Data were gathered from 194 respondents pooled from different travel, tourism and hospitality businesses.

In addition, through the Ministry of Tourism and Wildlife, current information on COVID-19 and its impact on the travel and tourism industry was collected from Kenya's Tourism State Corporations, Tourism Associations, and County Executive Committee members in charge of tourism. A total of 36 interviews were completed—nine (9) with chief executive officers (CEOs) of tourism state corporations, ten (10) with CEOs of tourism associations in Kenya, and 19 with County Executive Committee members in charge of tourism.

The tourism state corporations that participated in the study are the Bomas of Kenya, Kenya National Convention Bureau (KNCB), Kenyatta International Convention Centre (KICC), Kenya Utalii College (KUC), Kenya Tourism Board (KTB), Kenya Wildlife Service (KWS), Tourism Finance Corporation (TFC), Tourism Research Institute (TRI), and Tourism Regulatory Authority (TRA).

The associations comprised Kenya Association of Travel Agents (KATA), Kenya Association of Air Operators (KAAO), Kenya Coast Tourist Association (KCTA), Kenya Tourism Federation (KTF), Pubs, Entertainment and Restaurants Association of Kenya (PERAK), Kenya Association of Hotel Keepers and Caterers (KAHKC), Kenya Association of Tour Operators (KATO), Kenya Association of Women in Tourism (KAWT), North Rift Economic Block (NOREB), and Kenya Professional Safari Guides Association (KPSGA).

4.3 FIRMOGRAPHICS OF THE TOURISM ORGANIZATIONS

4.3.1 Business Category

The results of the analyses of the business category are illustrated in Figure 4.1. Overall, majority (26.5%) of respondents were under tour operators followed by those working in the accommodation sector such as hotels, guest houses and lodges, accounting for 20.9%. The lowest represented business category in the study was the airline accounting for 0.3%.

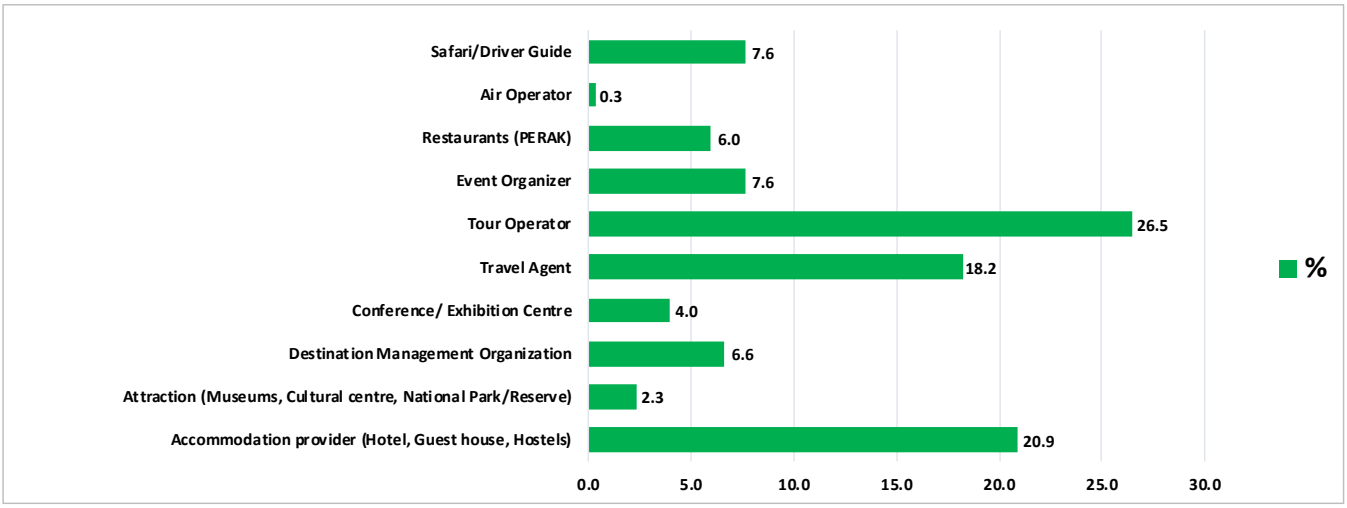


Figure 4.1: Business Category

Source: Analysis of Survey Data (2020)

4.3.2 Target Market

Details of the market(s) served by the businesses of the respondents are illustrated in Figure 4.2. The percentages show that most 48.6% respondents were in businesses serving the inbound international tourism market; 45.7% domestic markets, and 5.7% serving outbound tourism market. Besides, the highly targeted tourism markets include domestic and inbound international. This fact can be attributed to the massive stimulus that both markets provide to Kenyan economy through visitors' spending on tourism facilities and activities (Deegan, 2020).

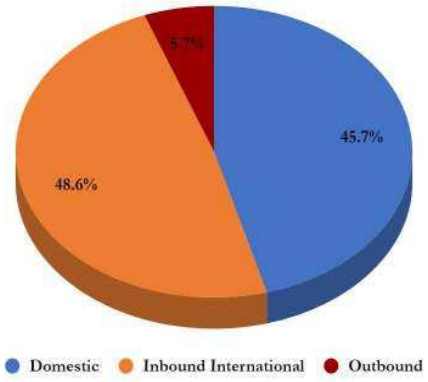


Figure 4.2: Target Market

Source: Analysis of Survey Data (2020)

4.3.3 Number of Workers Employed by Tourism Organizations

Figure 4.3 shows the number of employees' working in the business categories considered in this study. Most (57.7%) respondents revealed their organizations had employed at most 10 employees, 23.0% between 10 and 50, 7.7% between 51 and 100, 8.2% between 51 and 100, and 5.6% between 101-250 employees. Moreover, 5.6% of the respondents were employed in organizations with more than 250 employees. Evidently, most tourism organizations can be classified under micro and small enterprises (MSMEs). These enterprises are mostly run by small teams because of their low scale of operation.

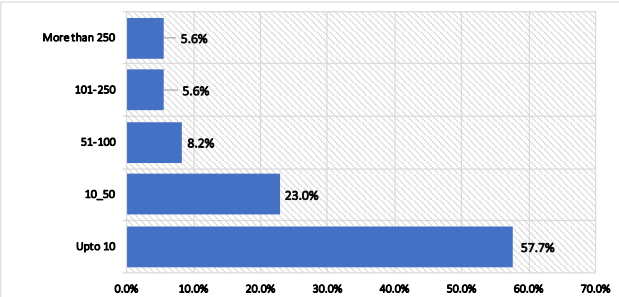


Figure 4.3: Number of Employees Employed by Tourism Organizations

Source: Analysis of Survey Data (2020)

4.4 IMPACT OF COVID-19 ON TOURISM EMPLOYMENT

The travel and tourism industry in Kenya is facing an unparalleled global health emergency in COVID-19 outbreak. The COVID-19 pandemic has brought the whole world to a halt with unprecedented and sudden impact on international tourist arrivals, domestic tourism, tourism sector businesses, safety and security, visitors, and employment in the tourism sector.

Considering the unprecedented and rapid evolving nature of the pandemic, it is extremely challenging to estimate the impact of COVID-19 on international tourist arrivals. But, on the basis of the latest global developments (such as quarantine measures, grounding of local international flights, travel restrictions and bans, closure of borders especially in Europe (representing about 50% of international tourism [UNWTO, 2020a]), United State of America, Middle East and Countries in Africa, international tourist arrivals in Kenya has been brought to zero for the first time in history. This is manifested in the following statements:

> ***"All international arrivals have ceased due to airport closures around the world (including Kenya). This means that all projected arrivals into Kenya for the next two quarters will be lost. This would be approximately 700 thousands***", said the CEO of KAHKC.

> ***"The direct effect as you all know is that everything has come to a halt. The minute the flights were stopped, that means that anyone who is willing to come to Kenya cannot, the market has come to an abrupt halt"***, reported the CEO of KATO.

4.4.1 Reduction of Employees as a Result of COVID-19 Outbreak

Details of whether the tourism organizations and establishments have reduced the number of employees are given in Table 4.1. Most 81.3% (157) respondents indicated that their organizations had reduced the number of employees as a result of COVID-19 outbreak and 11.4% (22) showed otherwise. Only 7.3% (14) indicated that reduction of number of employees was not applicable to their organizations either because of the smaller number of employees engaged or are among the fewest still in operation during COVID-19 pandemic. Generally, unprecedented government measures such as bans on international travels, restriction of movements and cancellation of major tourism activities in order to slow the spread of COVID-19 pandemic have adversely affected business operations resulting to reduction of number of employees engaged in tourism organizations.

Table 4.1: Reduction of Number of Employees Engaged by Tourism Organizations

Category	F	%
Yes	157	81.3
No	22	11.4
Not applicable	14	7.3
Total	193	100

The COVID-19 pandemic has put millions of the jobs at risk. The outbreak has resulted into many tourism organizations sending employees on unpaid leaves. And some have been forced to take unpaid leave as indicated in the following statement:

> ***"We honestly cannot project the number of jobs lost because at the moment let say okay most of our members who happen to work for tour operators, most of them are currently at home on unpaid leave", said the CEO KPSGA.***

The pandemic has also resulted to organizations letting their employees to work from home in line with the President's call to be able to contain and suppress the contagion. Indeed, the pandemic has seen many employees from the top management down to subordinates take home pay cuts.

> ***"Majority of employees are working from home",*** reported the CEO's of NCB, KTB, TRI, TFC, Bomas of Kenya, KUC, and TRA.

> ***"From top management in my company, the top management conspired a pay cut of 35 – 50 % depending on job group, they have taken paucity and working from home. We are currently grumbling with how to structure the middle and low cadre of employees because if someone is earning for example***

ksh.50, 000. I am not sure even at KTF how I'm going back to that person to agree on 30k or 40k. You have to negotiate, one cannot dictate, its negotiable", said the CEO of KTF.

The pandemic has also thrown employees into the fear of losing their employment. In fact, employees on contract and casuals are staring at the very real prospect of job losses.

"Vulnerability of the job is not felt very much apart from temporary workers (about 1,341) where we are looking at a point where we might be forced to permanently disengage. The casuals are the only ones who might feel that COVID-19 has brought the issue of job loss", the CEO of KWS responded.

4.4.2 Implementation of Pay Cuts

Results of the analysis of whether tourism organizations and establishments have implemented pay cuts as a measure of coping with the loss of revenue emanating from COVID-19 are shown in Figure 4.4. Most 85.5% respondents reported that their organization had indeed taken pay cut as a way to survive the loss of revenue as a result of COVID-19 outbreak. Only 14.5% reported otherwise. This could be because they are still in operation at the time when others closed their businesses and thus able to generate revenue enough to cater for their employees' salaries and remunerations. However, in an effort to comply with government appeal to employers not to lay off staff, most organisations resulted to implementing pay cuts as the most convinient way of coping with the effects of the pandemic on business operations. What is not clear is the sustainability of the pay cuts in the near longrun period.

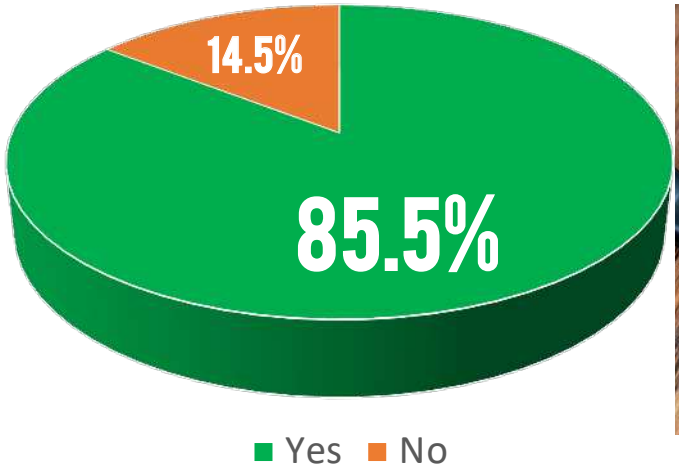




Figure 4.4: Implementation of Pay Cut as a Measure of Mitigation against COVID-19
Source: Analysis Survey Data (2020)

4.4.3 Percentage of the Pay Cut

Figure 4.5 illustrates the results of the analysis of data collected on the percentage of pay cuts implemented by the tourism organizations and establishments as a result of COVID-19 outbreak. As shown, most 31.9% respondents reported over 70% as the percentage of pay cut implemented by their organizations. The 27.7% of the respondents reported between 30% and 50%, 25.9% between 50% and 70%, and 10.8% between 20% and 30%. Only 3.6% of the total respondents reported that their organizations implemented a 10% pay cut.

In a struggle to stay afloat, the COVID-19 pandemic has compelled most employers to implement massive pay cuts. The ripple effect of the pay cuts on social stability and economic growth is inevitable. Most especially, the pay cuts may lead to a decline in consumption and total demand, hence affecting production and employment. Ultimately the total tourism earning may face a decline.

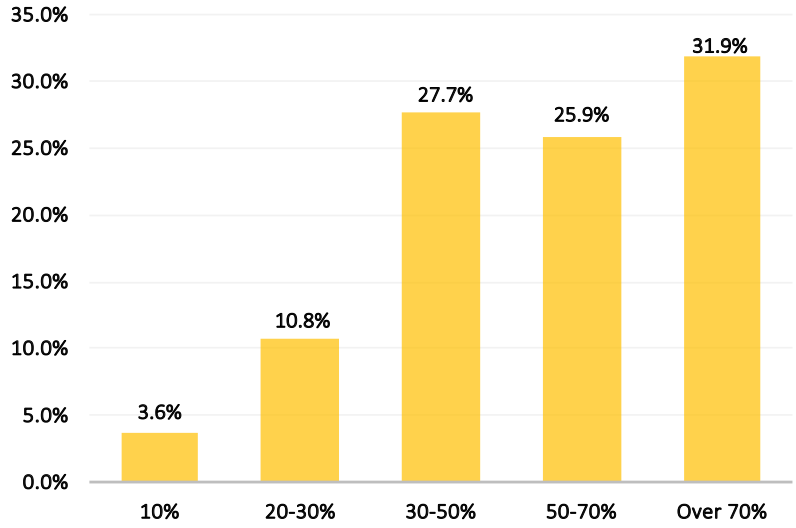


Figure 4.5: Percentage of Pay Cut Implemented by Tourism Organizations
Source: Analysis of Survey Data (2020)

4.4.4 Status of Unpaid Leaves

Details of the analysis of data collected on whether tourism organizations and establishments implemented unpaid leaves as a way to cope with the loss of revenue as a result of COVID-19 are given in Figure 4.6. Most (81.9%) respondents reported their organizations sent employees on unpaid leaves with only 18.1% (35) reporting otherwise.

The high number of employees on unpaid leave underscores the harsh impact of COVID-19 on tourism employment in Kenya and generally the entire world. It is notable that majority of employees on unpaid leave may directly lead to a decline in wages which may be accompanied by a fall in tourism product prices, because of the reduced purchasing power of the people. This may eventually slow the growth of tourism markets, especially domestic, hence a decline in tourism earnings.

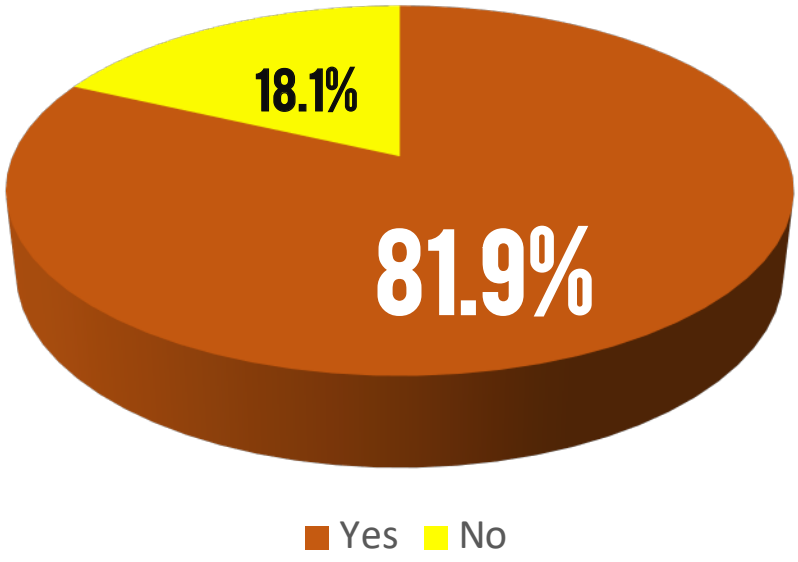


Figure 4.6: Status of Unpaid Leaves as a Result of COVID-19 Pandemic
Source: Analysis of Survey Data (2020)

4.4.5 Percentage of Employees on Unpaid Leaves

The results of the percentages of employees sent on unpaid leaves by their organizations are given in Figure 4.7. As shown, most 57.4% respondents reported over 70% as the percentage of employees already on unpaid leaves. The 16.0% reported 30 – 50% as the percentage of employees on unpaid leaves, 10.5% between 50 – 70%, 9.3% at most 10%, and 6.8% between 20 – 30%. The huge number of staff on unpaid leave points to uncertainty of the sustainability of tourism enterprises during the COVID-19 outbreak. Though these results corroborate the earlier mentioned facts that majority of tourism enterprises are MSMEs, the indefinite nature of the mitigation efforts to alleviate the impact of COVID-19 pandemic compounds the situation especially in terms of planning and sustainable business recovery.

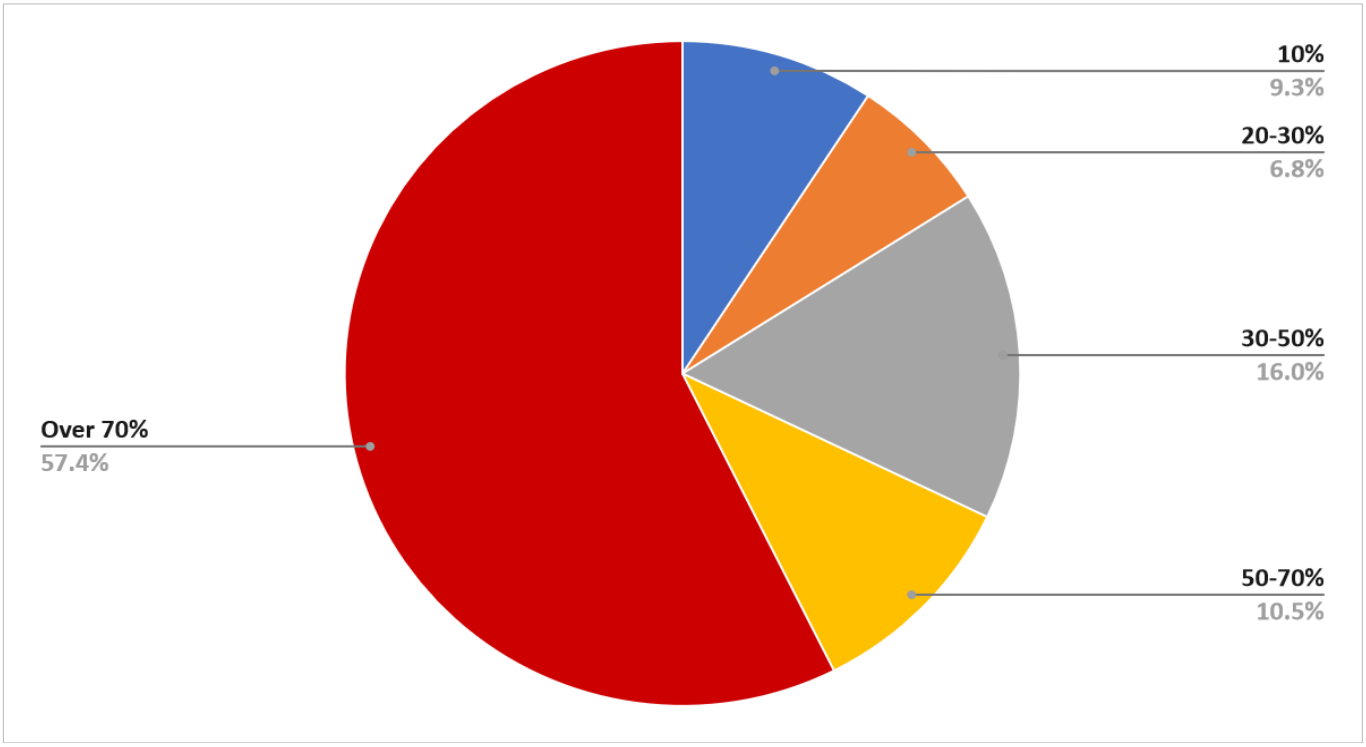


Figure 4.7: Percentage of Employees on Unpaid Leaves

Source: Analysis of Survey Data (2020)

4.4.6 Likelihood of Staff Reduction in Coming Months

Results of the analysis of data collected on the likelihood of tourism organizations to right-size in future as a result of COVID-19 outbreak are illustrated in Figure 4.8. The organizations were more than likely to right-size in coming months as reported by most (74.2%) respondents. About 12% were fairly likely, 9.8% did not know, and 4.1% not likely.

These results underscore that the future of tourism employment is pointing towards an increased likelihood of immense layoffs even compounded by the fact that the end to the pandemic is uncertain and nowhere in sight. These findings coincide with WTTC (2020d) that predicted that one million jobs a day are lost globally in Travel and Tourism owing to the pandemic. Along similar lines, the UNWTO (2020a) report on supporting jobs and economies through travel and tourism predicts a worldwide slump, with an impending loss of millions of jobs in the travel and tourism sector—finding that validates the results of the current study.

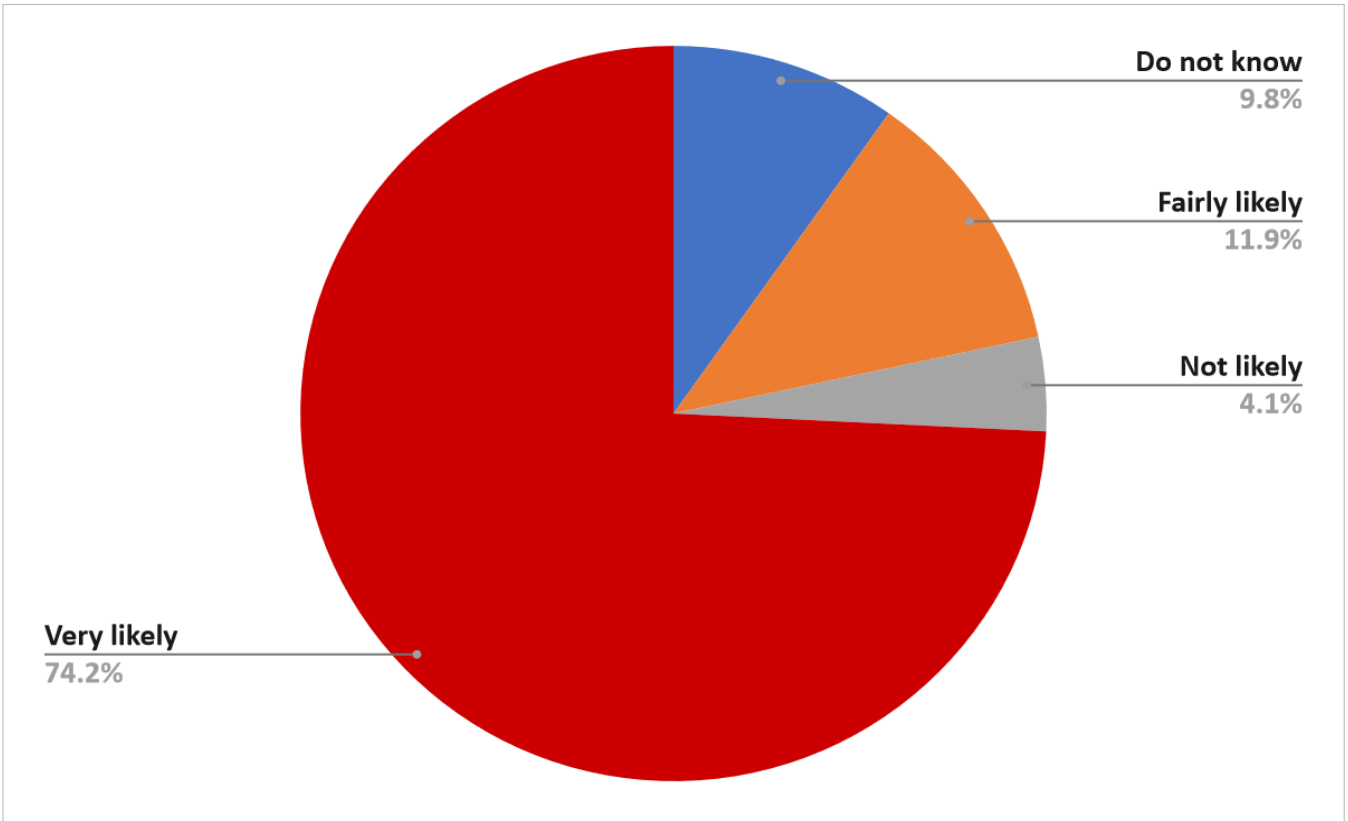


Figure 4.8: Possibility of Employee Lay-offs
Source: Analysis of Survey Data (2020)

In addition, interviews with various CEOs' revealed that COVID-19 outbreak has led to temporary closure of businesses in the tourism sector. The pandemic has brought temporary closure of majority of hotels and other accommodation establishments, restaurants, events and meetings, tour operators, and travel agencies. There are risks some of the businesses in the sector may never rejuvenate from the severity of the pandemic.

"We have members that have temporarily closed. They just closed temporarily until further notice. They don't know when they will open", the CEO KTCA responded.

"A majority of the hotels have announced temporary closure while restaurants, entertainment spots, travel agents, tour operators and airlines have been forced to shut down. We may well find ourselves in a situation where a good number will be unable to reopen", the CEO KAHKC retorted.

"We have closed all meetings and events in line with the GoK call to work from home and maintain social distancing", the CEO KICC said.

"We have suspended all our cultural performances. That means no money! We have also suspended the hire of our conference facilities. Yes, the halls that we normally hire out for business. We have also suspended hiring all our grounds for parties we normally host schools both primary, secondary and even colleges including universities who come to study cultural activities here. So, we suspended all that. We also have a restaurant here that deals with the African traditional cuisine especially the Kenyan cuisine; which is normally run by Utalii College here. We also suspended those services", added the CEO of Bomas of Kenya.

COVID-19 outbreak has also distorted how all businesses in the tourism sector operate.

4.5 IMPACT OF COVID-19 ON BOOKINGS

Results of cancellations to existing bookings as a result of COVID-19 are presented in Figure 4.9. COVID-19 pandemic resulted to cancellations of a significant number of bookings as reported by most (94.4%) respondents. The cancelation of bookings can be attributed to the government directives on lockdowns, suspension of travels and travel restrictions, shut down of some hotels among others. These results provide a strong empirical evidence that COVID-19 pandemic has brought huge losses to tourism businesses.

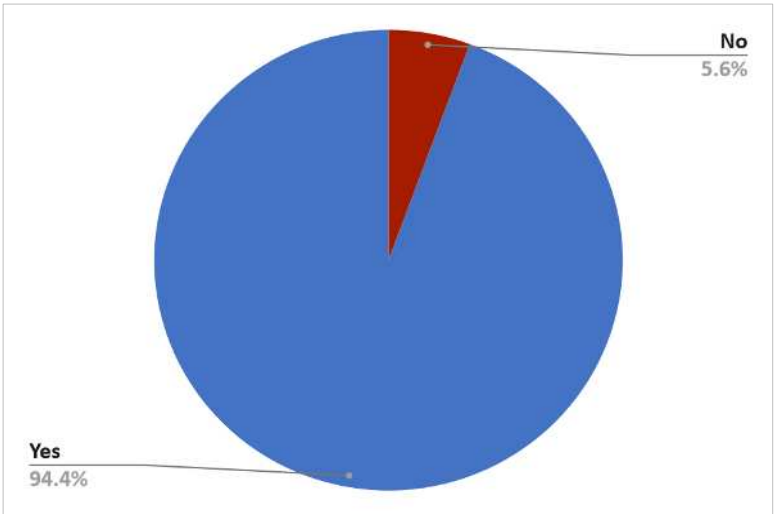


Figure 4.9: Cancellation of existing bookings as a result of covid-19 outbreak
Source: Analysis of Survey Data (2020)

4.5.1 Percentage of Existing Bookings Cancelled

Overall, most (64.5%) respondents reported over 90% as the percentage of cancellations of existing bookings experienced by their organizations as illustrated in Figure 4.10. The existing booking cancellations ranging from 51 – 90% were reported by 18.8% of respondents. Only 1.6% of the respondents reported zero cancellation of bookings by their organizations.

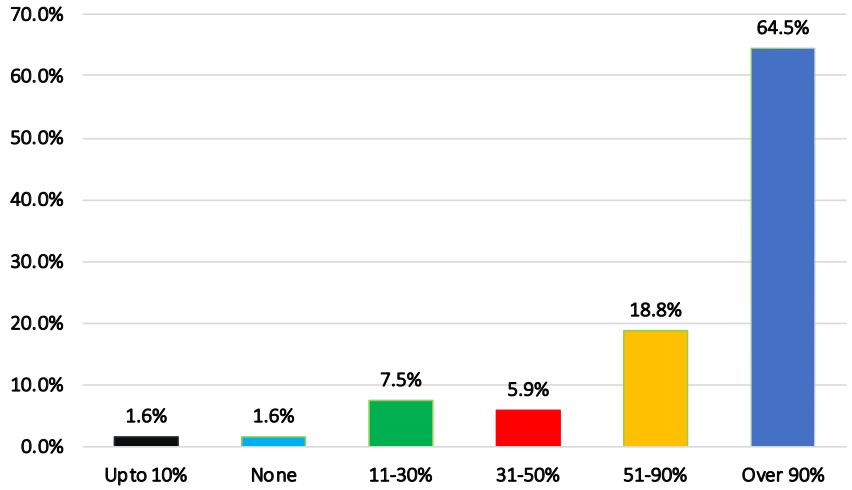


Figure 4.10: Cancellations to Existing Bookings
Source: Analysis of Survey Data (2020)

Drawing from these statistics, the mass cancellations of tourism events, flights, accommodation and related services has majorly impacted the tourism industry. These findings coincide with remarks from the CEO of KAAO and KATA who noted that;

"The government from yesterday said no more flights. We have nearly lost like 80% from the effect. Our sector is the aviation industry, I think it is one of the worst hit worldwide, not just Kenya" (CEO KAAO).

"International travel was suspended as at 26th March, 2020, with that it led to a cancellation of the bookings that were held in the airlines and as we transition to the month of April, travel agents have to close their shop because they do not have any customers that they will be attending to" (CEO KATA).

The cancellations are likely to cause a major decline in tourism arrivals from 2.05 million tourists received in 2019 (GoK, 2019).

4.5.2 Tourism Market with Majority of Cancellations

Details of the analysis of data on the tourist market whose bookings were majorly affected by COVID-19 outbreak are given in Table 4.2. The international tourist market was the hardest hit by the COVID-19 pandemic a reported by most (81.3%) respondents. This wa followed by the domestic and regional touris markets as reported by 64.2% and 38.3% of the respondents respectively. This is as a result o travel restrictions and bans imposed globally a countries increased the fight against COVID-1 pandemic. The results of the cancellation on domestic bookings could be attributed to the GoK travel restrictions and 7.00pm to 5.00am curfew among other measures.

Table 4.2: Tourist markets experiencing most changes in bookings

Category	F	%
Domestic visitors	124	64.2%
Regional visitors	74	38.3%
International visitors	157	81.3%
Outbound	29	15.0%
Inbound visitors	2	1.0%
Outbound visitors	1	0.5%

Source: Analysis of Survey Data (2020)

4.5.3 Changes in Bookings in the Domestic Market as a Result of COVID-19 Outbreak

Figure 4.11 illustrates the percentage changes in the domestic tourism as a result of COVID-19 outbreak. Most (27.2%) repondents reported at most 10% as the percentage of domestic bookings affected by COVID-19 outbreak and 11.4% reported over 90%. Also, 4.3% of the respondents indicated that of all the changes to existing bookings experienced by their organizations, none were from the domestic market. These results indicate that organizations had lower domestic tourists bookings. The domestic markets have experienced numerous changes in bookings due to the COVID-19 pandemic.

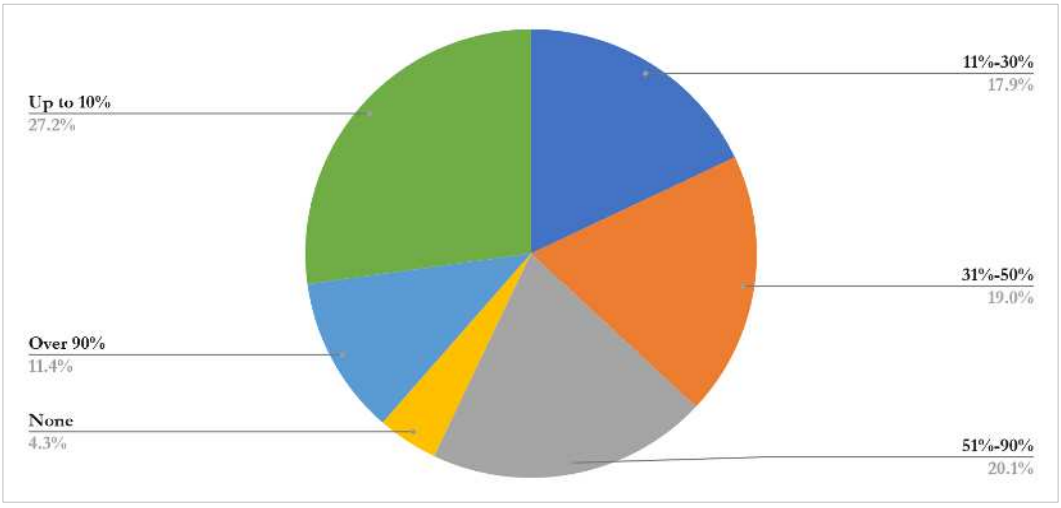


Figure 4.11: Percentage of booking changes experienced by businesses from the domestic market

Source: Analysis of Survey Data (2020)

The changes have been occasioned by postponments and cancellations of bookings due to the government mitigation measures such as restriction of movements, 7pm-5am curfews, isolation among others. However, it is interesting to note that the high segmentation of the bookings from the domestic market undercores the fact that this market is a major contributor to total tourism receipts in Kenya.

COVID-19 outbreak has forced the GoK to implement drastic measures to contain the contagion some of which include the enforcement of 7.00pm – 5.00am curfew, social distancing, emphasis of stay and work from home, and closure of borders of counties with high risks of spread of the COVID-19 (that is, Nairobi metropolitan, Mombasa, Kilifi, Mandera, and Kwale). Whilst these measures have helped in the management of the COVID-19 infection so far, they have brought the domestic tourism in Kenya to a sudden standstill.

> ***"COVID-19 pandemic is affecting the domestic tourism in that, like this Easter holiday, people go to Mombasa, Maasai Mara, people move out of their homes to go and enjoy the vacation, and that is not happening. And you know domestic tourism is the one that was supposed to keep us afloat but now it is not happening, it is paralyzed," the CEO KAWT noted.***

> ***"The domestic market is also adversely affected by the isolation law, and when we don't have people travelling, the hotels are not open so we don't have anything going on, and everything has come to a grinding halt", the CEO KATO retorted.***

> ***"It has affected domestic tourism the biggest with all the outlets closed. And then with the concept of social distance how do you deal with that? And right now just like the, Cabinet Secretary of Health has said, community transmission is on the increase, people are respecting the fact that we are at war. So, people are sitting at home, and when you sit at home there is no tourism. So domestic tourism in my opinion is zero. Let me put it this way, if I was to go to Mombasa, I would stay at White Sands which is already closed. Then I would be like, there is no life here let me go to K1, down the road for beers and Nyama Choma, but K1 is also closed. Nearly all the malls are closed. So where exactly am I going to enjoy my domestic tourism or vocation? There is no way. So it is a huge impact on domestic tourism",*** the CEO PERAK responded.

COVID-19 has distorted occupancy and sales projections in the tourism industry in Kenya. While this is felt globally, Kenya suffers more especially because its biggest tourist market is the international market. The world is fire-fighting without the knowledge of how to eradicate the outbreak. Nobody knows when the outbreak will end and thus it is important to say that nobody can make clear cut projections in the tourism industry.

> ***"The effect on occupancy is a complete cancellation of all bookings. In some cases, from the 80-100% range to zero", noted the CEO of KAHKC.***

4.5.4 Changes in Bookings in the Regional Market as a Result of COVID-19 Outbreak

The percentage of booking changes experienced by tourism organizations in the study from the regional market was at most 10% as reported by most (50.3%) respondents (Figure 4.12). Over 90% was reported by only 2.8% of the respondents. These results resonate well with those from the domestic market clearly indicating that tourism organizations were having few bookings from the regional market. These results indicate over-reliance of the international tourist market by tourism organizations and establishments in Kenya. Besides, the slight change in bookings from regional markets can be majorly attributed to COVID-19 mitigation measures within the region such restrictions of movements and suspension of flights.

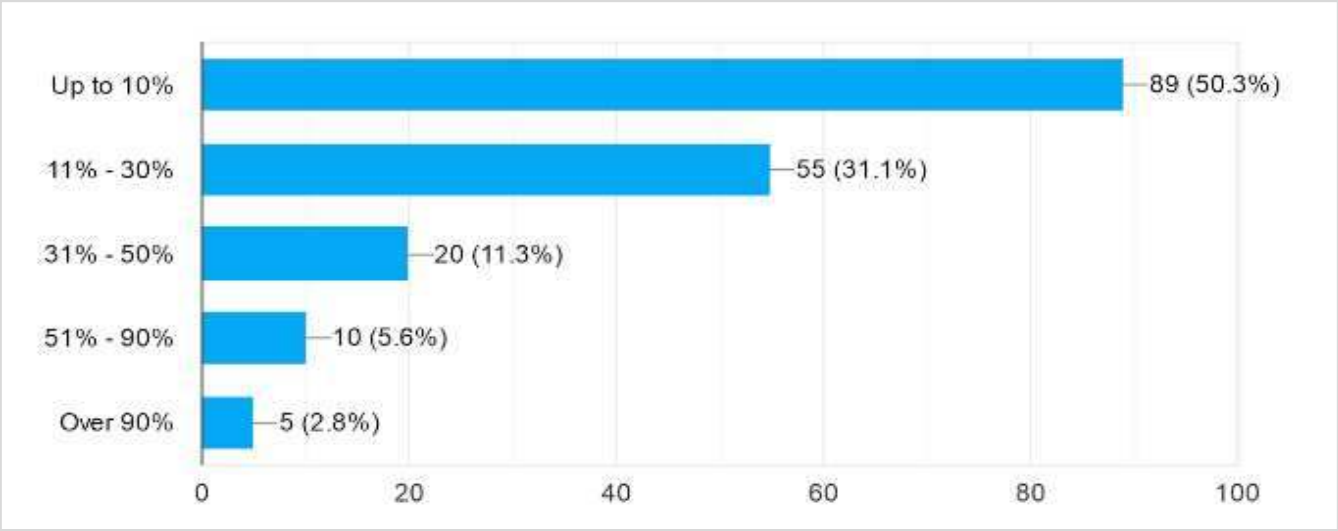


Figure 4.12: Percentage of the booking changes experienced by tourism businesses from the regional market
Source: Analysis of Survey Data (2020)

4.5.5 Changes in Bookings in the International Market as a Result of COVID-19 Outbreak

Details of the percentage of booking changes experienced by tourism organizations and establishments from the international market are demonstrated in Figure 4.13. As shown, most (35%) respondents reported 51% - 90% as the percentage changes in bookings from the international market, and 23.9% reported over 90%.

These results could be attributed to bans and restrictions imposed on international travels globally. Moreover, these results are apparent that tourism organizations in Kenya rely heavily on the international market for survival.

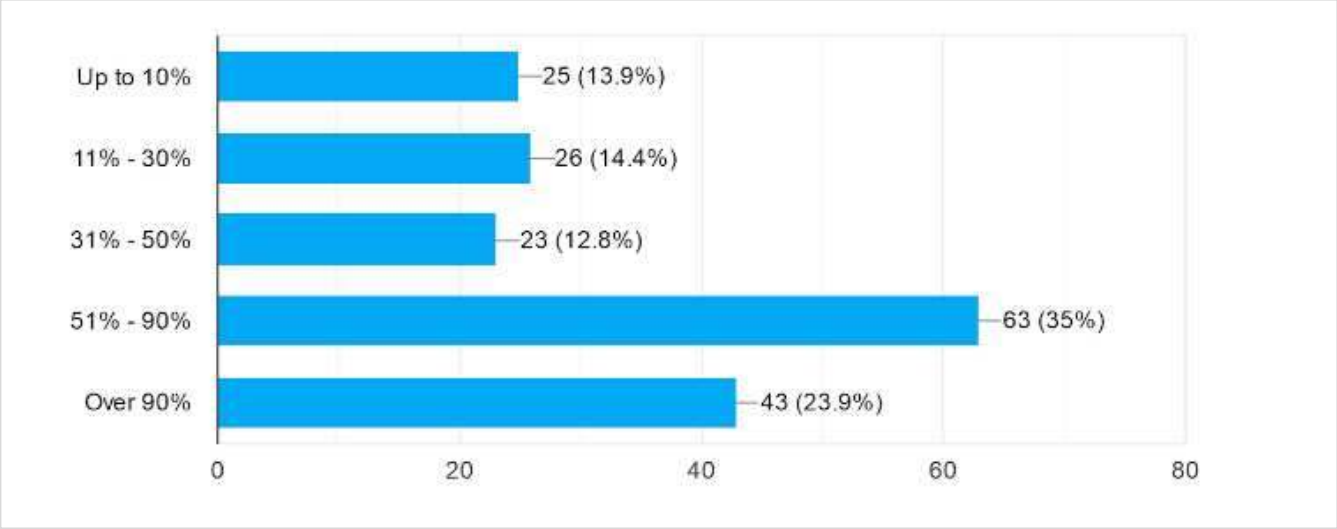


Figure 4.13: Percentage of the booking changes experienced by tourism businesses from the international market
Source: Analysis of Survey Data (2020)



4.5.6 Time Series Forecasting of Visitor Arrivals and Departures

A time series gives the relationship between two variables, one of them being time. Mathematically, a time series is given by;

$$Y = f(t)$$

Where y (in this case tourism arrival and departure) is the phenomena at any given time t. Thus y can be regarded as a function of t.

Time series is constituted by following components:

- Secular trend or long term movement
- Periodic changes or short term movement
- Irregular or random movement.

The major concern of time series analysis is to study the net effect of these components on the movement of the time series and also to study these components independently.

A time series is used for business and policy planning:

- It is used to study the past behavior of the phenomena under consideration (arrivals and departures)
- It is used to compare the current trends with that in the past or the expected trends. Thus, it gives a clear picture of growth or downfall.
- It is used in business forecasting and policy planning by various organizations.
- The cyclic variation helps in understand business cycles
- The seasonal variations are useful for tourism stakeholders as they earn more in certain seasons.

The Figure 4.14 presents an upward trend with a slump during the year 2015/2016. The trend is expected to continue taking an upward movement in the future (2020-2025) based on historical data (assuming no major interruptions). The future effect of COVID19 on tourist arrivals will be assessed against this trend.

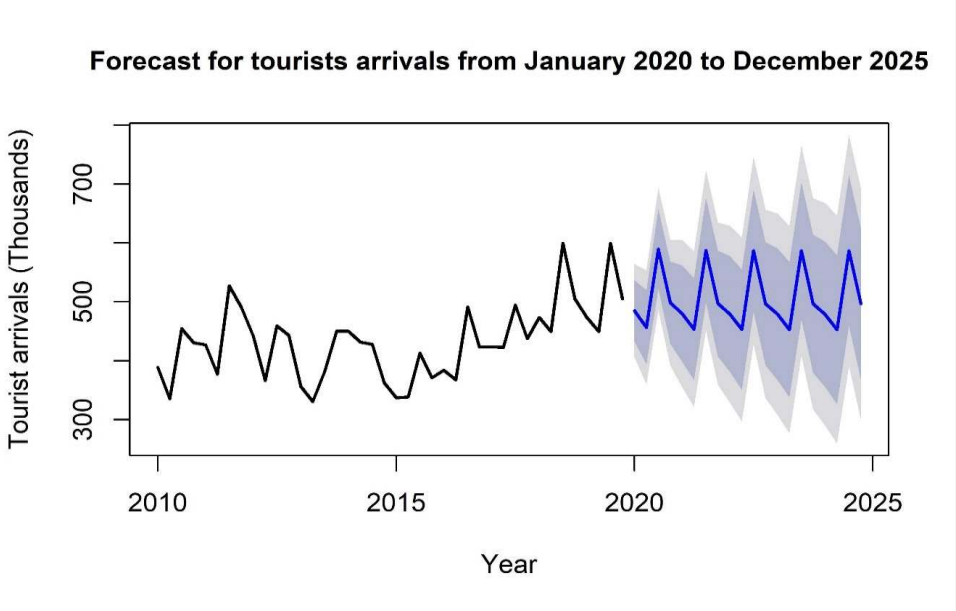


Figure 4.14: Forecast for Tourism Arrivals from January 2020 to December 2025

Tourism depature figures in Figure 4.15 follow a similar trend to that of arrivals except that fluctuations are less erratic. Departures are thus less affected by external and internal factors to the tourism industry of Kenya. Departures from the forecasted trend will reveal the medium and long terms impact and effects attributable to COVID19 and other intervening factors.

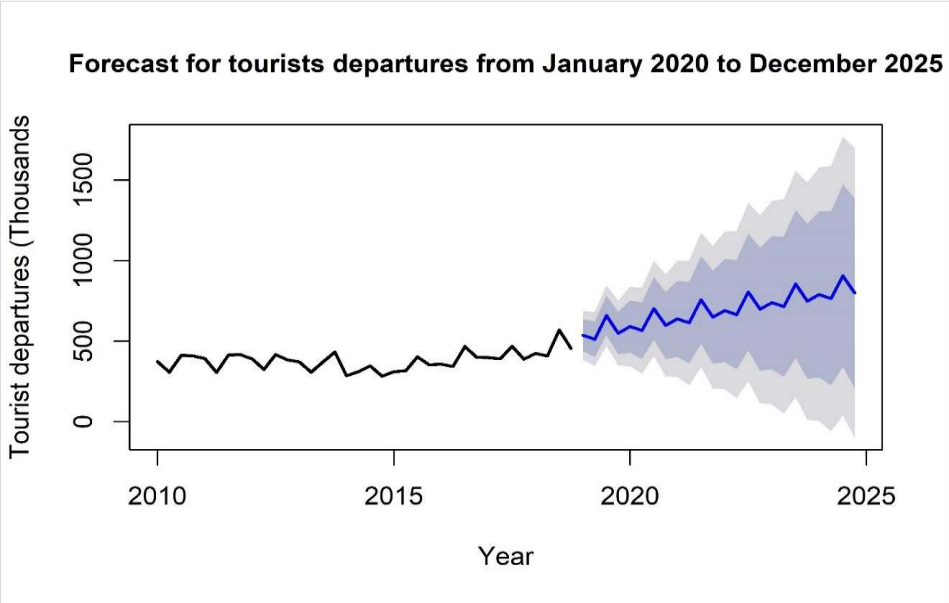


Figure 4.15: Forecast for Tourism Departures from January 2020 to December 2025

4.6 IMPACT ON VISITATION TO KWS NATIONAL PARKS AND RESERVES

Visitation to KWS national Parks and Reserves is a good indicator of the performance of the tourism sector, given that wildlife tourism is a key component of Kenya's tourism industry. In view of the current pandemic, data from the last three years compared to the first quarter on 2020 were analyzed and the results are presented in Table 4.3.

Table 4.3: Comparative Analysis of Visitors to KWS Parks and Reserves Jan-Mar, 2017-2019 and Jan-Feb, 2020

Visitors to KWS Parks and Reserves for 2017	JAN	FEB	MAR
Citizen	66,566	66,856	96,369
Residents	6,594	6,355	4,582
Non- Residents	35,041	35,234	28,504
Total	108,201	108,445	129,455
Visitors to KWS Parks and Reserves for 2018	JAN	FEB	MAR
Citizen	61,636	78,201	98,130
Residents	6,714	6,797	6,459
Non- Residents	44,699	49,129	40,264
Total	113,049	134,127	144,853
Visitors to KWS Parks and Reserves for 2019	JAN	FEB	MAR
Citizen	72,037	83,503	120,224
Residents	6,367	6,342	5,769
Non- Residents	53,985	57,654	41,000
Total	132,389	147,499	166,993
Visitors to KWS Parks and Reserves for 2020	JAN	FEB	-
Citizen	73,584	81,989	-
Residents	6,662	5,900	-
Non- Residents	56,591	62,226	-
Total	136,837	150,115	-

Source: (KWS 2017-2020)

From the above data, it is evident that visitation to tourism attractions and specifically to the KWS national parks and reserves has been on an upward trend since 2017 (Appendix 6) and even though data for March 2020, was not available at the time of data collection, the first 2 months give a clear indication that 2020, was going to be a good year for tourism in Kenya. The threats from the effects of COVID-19, however are likely to slow down this growth.

"COVID-19 outbreak has led to the decline of park visitation from March 2020 by 87%, which is indeed a huge drop", CEO KWS reported.

4.7 RELATIONSHIP BETWEEN CHANGES IN BOOKINGS AND CANCELLATIONS (FOR A PERIOD FROM JAN-JUNE 2020) AND BUSINESS REVENUE

The tourist sector in Kenya is also facing a sudden loss of income as a result of halted international arrivals in the country. This is exacerbated by the sudden reduction in holidaying period and rescheduling of vacations by international visitors. This is apparent as indicated in the following statement:

"There is loss of income, what we call multiplier effect of money is zero", the CEO, PERAK reported.

"Again, anybody who was still around cut short their visit amended their dates and left with earliest flights available" as reported by the coordinator, NOREB.

Most 94% respondents reported that their organizations had experienced a reduction in business revenue which was attributed to booking cancellations as shown in Figure 4.16. This result indicates that a big portion of revenue generated by tourism organizations in Kenya come from tourists' bookings that are international in nature.

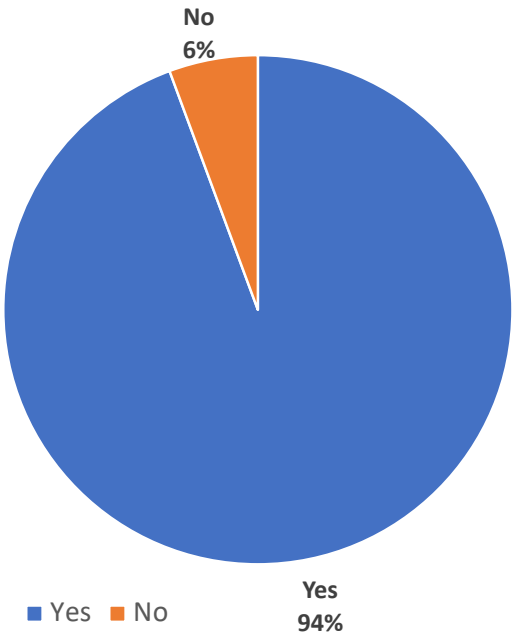


Figure 4.16: Changes in revenues as a result of cancellation of bookings

Source: Analysis of Survey Data (2020)



4.7.1 Amount of Revenue Lost as a Result of COVID-19 Outbreak

Results of the amount of revenue lost as a result of COVID-19 pandemic are shown in Figure 4.17. Most (45.0%) respondents indicated that their businesses have lost revenues above 2.5millions, 5.8% from 2.1 to 2.5 million, 7.9% from 1.5 to 2 million, 3.7% from 1.1 to 1.5 million, 22.8% from 500,000 to 1 million, and 14.8% below half a million. These results indicate that, cumulatively millions of shillings have been lost by tourism organizations in Kenya as a result of COVID-19 outbreak. The loss is estimated to have been recorded within a period of 4 months from the first time the outbreak was reported in China in December 2019.

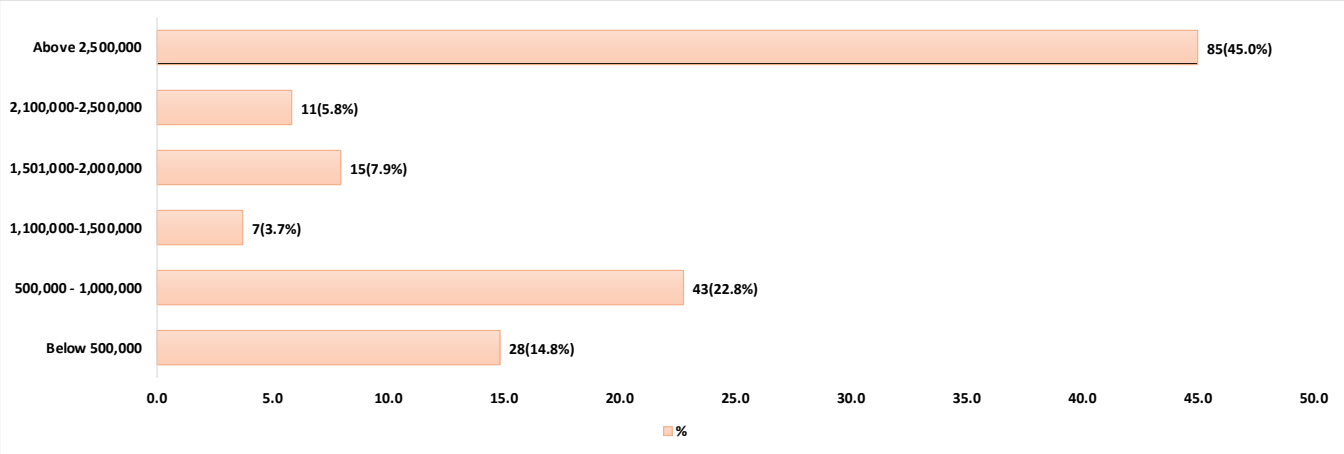


Figure 4.17: Percentage Revenue Loss by tourism businesses in Kenya

Source: Analysis of Survey Results (2020)

4.8 IMPACT OF COVID-19 ON SECURITY AND SAFETY

On the top-side, COVID-19 pandemic has led to increased security of the general populace especially at the many set police check-points. Equally, the pandemic has heightened the safety and hygiene of the populace. On the downside though, COVID-19 outbreak has brought increased fear of job losses and society lawlessness with many theft cases reported.

"We are also staring at imminent job cuts and unemployment which are indicators of insecurity, generally when people don't have jobs. People have got salaries cut. People are unemployed. It is a recipe for chaos. And so this is how COVID-19 is affecting the security of the state the security of the citizenry", the CEO of Bomas of Kenya retorted.

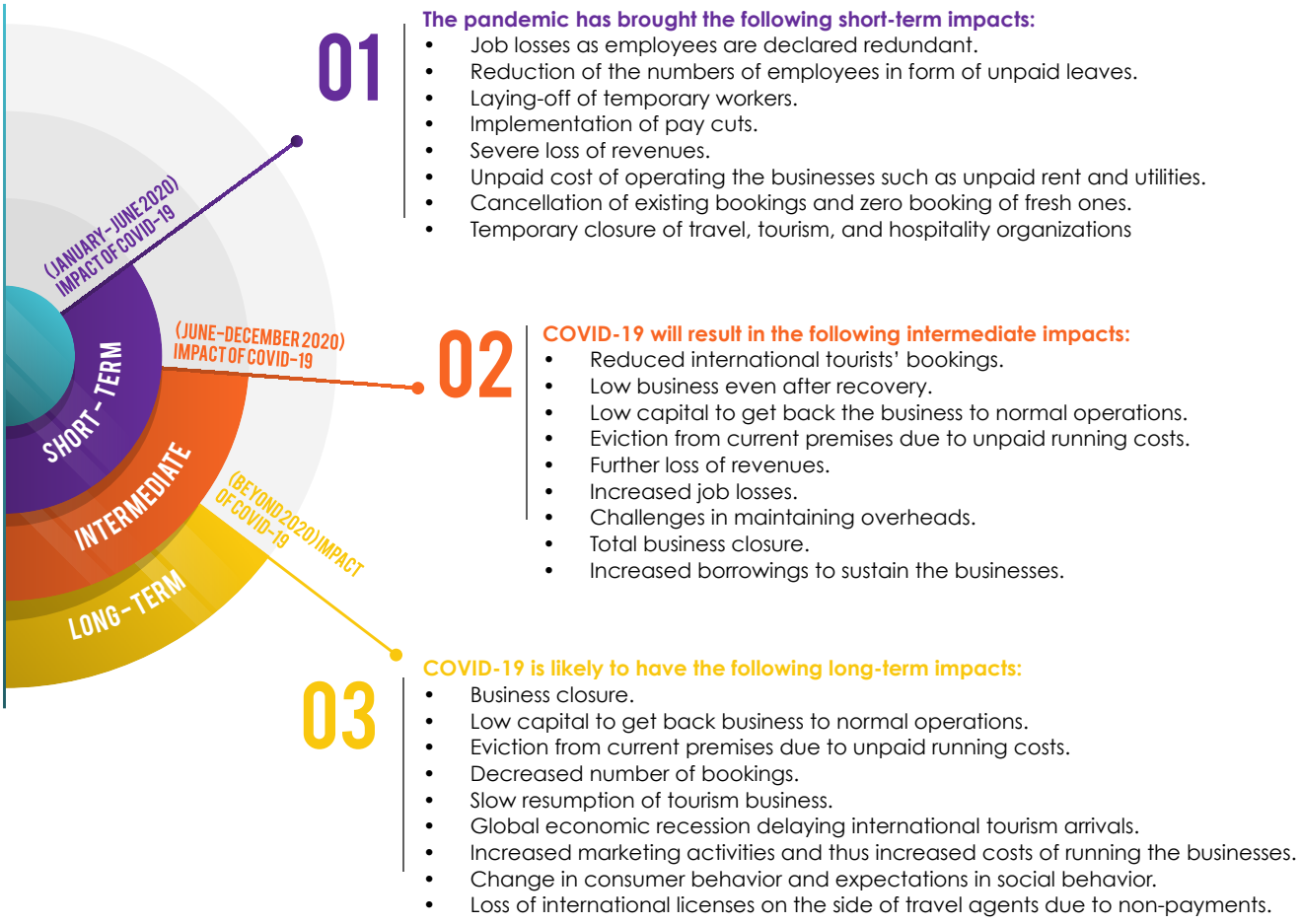
COVID-19 pandemic has brought stigmatization in the tourism sector. The locals are seeing the Chinese as the source of COVID-19 virus and hence the reason why the whole world is suffering. The Chinese forms a significant portion of the Kenya's tourist market. And such stigma will have dire consequences in the future. The tourism industry in Kenya may also experience international tourists' distrust of the missions in place to eradicate COVID-19 pandemic. While great amount of efforts have been put in place by the GoK, the international tourist may still believe the country still experiences COVID-19 pandemic even when this is not the case.

4.9 IMPACT OF COVID-19 ON TOURISM AT THE COUNTY GOVERNMENT LEVEL

At the Counties level, tourism has not been saved from the impact of COVID-19 either. Although the impact vary with individual counties, the COVID-19 pandemic has brought the following six impacts: firstly, closure of hospitality businesses (hotels, restaurants, and clubs, bars) as a result of travel restrictions and the call by the GoK to stay home and social distance. Secondly, diminished revenues to County Governments as hospitality businesses and tourism service centers (such as recreational facilities) are not in operation. Counties where fishing in activity cannot do the business leading to loss of revenue. The GoK curfew has rendered many tourist activities in all counties to an inertia mode leading to huge decline in revenues collected. Thirdly, agriculture which supports tourism activities has hugely been affected. Fourthly, suspension of state events such as the Madaraka day event scheduled to happen in Kisii County. This results to loss of hospitality businesses and thus loss of revenues. Fifthly, reduction in local visitation of tourism attraction sites in various counties and lastly, reduction in domestic tourism within and outside the counties as a result of travel restrictions and deteriorated sources of revenue.

4.10 TIMELINE OF COVID-19 PANDEMIC IMPACT ON TOURISM BUSINESSES

The tourism industry is likely to face the following impact at different timelines, comprising short-term (January – June 2020), intermediate (June-December 2020) and long-term (beyond 2020) (Infographic 4.1).



Inforgraphic 4.1: Timeline of COVID-19 Pandemic Impact on Tourism Businesses

4.11 IMPACT OF COVID-19 ON GROSS TICKET SALES COMPARISON – KENYA

Table 4.5 and 4.6 present the impact of COVID-19 on gross ticket sales comparison for year 2019 and 2020 in millions of USD and KES respectively.

Table 4.5: Gross Ticket Sales Comparison – Kenya (USD Millions)

(USD Millions) - Gross Ticket Sales Comparison - Kenya					
	January	February	March	April	YTD
2019	56.86	33.52	39.98	37.66	2,187.02
2020	33.11	31.31	10.75	0.03	75.2
Variance	-44.77%	-6.57%	-73.11%	-1.00%	-0.05%

Source: KATA Sales Report 2020

Table 4.6: Gross Ticket Sales Comparison – Kenya (KES Millions)

(KES Millions) - Gross Ticket Sales Comparison - Kenya					
	January	February	March	April	YTD
2019	615.17	386.18	443.54	407.2	1,852.09
2020	339.48	285.43	108.9	-2.45	731.36
Variance	-44.81%	-26.09%	-75.45%	-100.60%	-0.61%

Source: KATA Sales Report 2020

4.12 MITIGATION MEASURES

The mitigation measures are to provide strong support for the tourism sector in Kenya to not only recover from the unparalleled impact of the COVID-19 pandemic but to do so faster and better. Knowing that travel and tourism has been the toughest hit of all sectors, the mitigations measures are provided to support the GoK and the private tourism sector in circumnavigating the unprecedented economic and social impact of COVID-19. These measures put in place by Government and tourism businesses include, but not limited to:

4.12.1 Measures Undertaken by the Government of Kenya

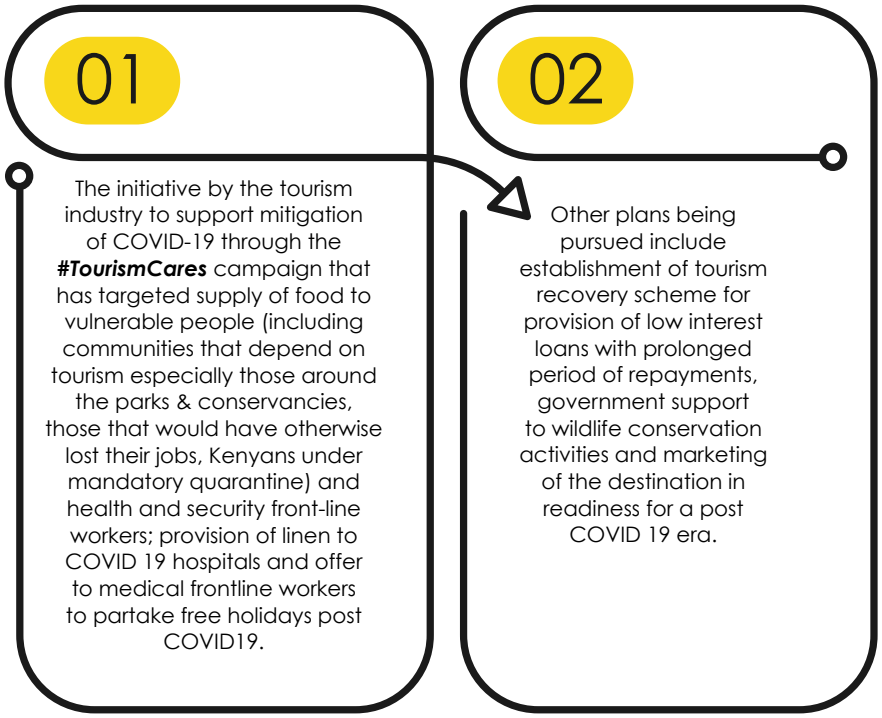
In Kenya, the following measures have been taken to curb the spread of the virus: all international flights were suspended effective 25th March, 2020 at midnight with the exception of cargo flights whose crew must observe strict guidelines; all travelers coming into the country before 25th March, 2020 had to go through quarantine at a government-designated facility at their own expense; all international meetings and conferences have been banned until April. Besides, there are internal restrictions, the government has put a curfew which started on 27th March, 2020 and enforced between 7pm-5am.

In Kenya, the Ministry of Tourism and Wildlife, in mid-March 2020 set aside Sh500 million for the country post COVID-19 recovery plan. Part of this money will be used to restore destination confidence to ensure that Kenya remains as a preferred travel destination globally while the rest will be used for the post COVID-19 recovery strategy in all the key source markets (Daily Nation, 2020b). Table 4.7 indicate the measures taken by the Kenyan government to contain the spread of the COVID-19 in the country.

Table 4.7: Measures taken by the Kenyan Government against COVID-19

S/No.	Reference	Description of the Measure
1.	7.2.2020	• Isolation rooms set aside in JKIA, Kenyatta National Hospital, Mbagathi Hospital and in all the Counties for COVID-19.
2.	12.3.2020	• The Ministry of Tourism and Wildlife set aside Sh500m for recovery.
3.	13.3.2020	• Suspension of all non-essential travel to any destination outside Kenya for all government officials, whether on official government business or private business.
4.	13.3.2020	• Ambassadors and high commissioners serving in Kenya's missions abroad to represent the government on international engagements.
5.	13.3.2020	• 30-day ban on all conferences of international nature and those that have more than 15 international participants. • Suspension of all public gatherings, meetings and events for 30 days
6.	13.3.2020	• Kenya Airways suspends flights on its Rome-Geneva route in response to developments following the COVID-19 outbreak. The national carrier said the suspension was effective from 13th March to 30th April, 2020.
7.	15.3.2020	• Hundreds of Kenyans arriving back from overseas are required to be on self-isolation for two weeks.
8.	24.3.2020	• All passengers coming to the country must undergo mandatory quarantine either at their own hotel, government-approved hotels or in designated government facilities
9.	24.3.2020	• Hotels receiving mandatory quarantine cases were advised by the government to offer modest rates in order to facilitate isolation of people arriving from overseas. • The government proposed a 25 to 50 percent discount rates for hotels offering accommodation services, while noting that some hotels were abusing the quarantine order to exploit customers.
10.	25.3.2020	• The government closed the Kenyan airspace to all international passenger flights.
11.	28.2.2020	• The president formed the National Emergency Response Committee to monitor the risk posed by COVID-19. The taskforce role is to coordinate Kenya's preparedness, prevention and response to the disease.
12.	IATA (2020b) From Feb 2020	• Many airlines are cutting capacity and taking emergency measures to reduce costs. • Airlines are doing their best to stay afloat as they perform the vital task of linking the world's economies. • -As governments look to stimulus measures, the airline industry will need consideration for relief on taxes, charges and slot allocation.
13.	KQ From Feb 2020	• The main national airline carrier, Kenya Airways (KQ) promised to rebook customers affected on alternative routes, refund those who would cancel, or waive booking fees for those willing to reschedule their flights to a later date.

Other measures put in place include:



Infographics 4.2. Other measures put in place

4.12.2 Proposed Mitigation Measures by the Government of Kenya

The proposed mitigation measures by the government are presented in Box 4.1.

Box 4.1: Proposed Mitigation Measures by the Government of Kenya

i. Increased marketing and position of Kenya as a tourism destination. Marketing should be a concerted effort where all the state corporations and associations unite to show case that Kenya is still a destination to visit. To achieve this, innovations on how to package and sell Kenya as a tourist destination virtually are imperative.
ii. Government stimulus package to take care of the losses and costs.
iii. Private-public partnerships are important towards alleviating the impact of COVID-19 and to cushion the hospitality businesses.
iv. Consideration of tourism at the core of the national recovery policies especially because of its multiplier (direct, indirect, and induced) effects.
v. County governments need to inject some monies to tourism SME's. This can be achieved through provision of low interest loans with prolonged period of repayments.
vi. Provision of tax relieves/vacations to tourism businesses by the national and county governments.
vii. Encourage communities' participation in curbing COVID-19 outbreak. For example, utilization of Nyumba Kumi initiative to identify threats and sensitize locals against victimizing any person who may be a COVID-19 suspect or victim.
viii. Provision of free sanitizers and masks to be worn in public places.
ix. Use of media to encourage social distancing rule.
x. Encourage all businesses to ensure provided measures by the government are utilized to the letter.
xi. County governments partnering with the national government to ensure that fumigation of public places is achieved.
xii. Recruiting and training more health officers to provide support in the fight against COVID-19 outbreak.
xiii. Observing government regulations and cascading it to the villages.
xiv. The county governments need to establish COVID-19 response team fund to cater for emergencies.

4.12.3 Mitigation Measures by Tourism Businesses

Table 4.8: Mitigation Measures by Tourism Businesses

Issue	Response
General	• Doing nothing at all due to unprecedented nature of the crisis. • Staff lay-offs to survive the loss of revenues. • Temporary shut-down of businesses. • Implementation of pay-cuts. • Implementation of work from home strategy. • Provision of funds by the directors and owners to help run the businesses. • Reduction of overhead costs • Increased online marketing activities to remain viable
Cleanliness, hygiene	• Increased frequency of cleaning and disinfecting of Hotel rooms, public areas, with special interest given to high contact areas such as lift buttons, door handles, telephones, light switches, vehicles, • Training staff on cleanliness and hygiene protocol • Distancing protocols • Increased provision of disinfectants in various locations around the hotel • Hygiene of food, sanitizing vegetables • Regular provision of information to staff and customers • Provision of protective gear to staff • Increased fumigation of premises
Bookings and cancellations	• Flexibility in handling cancellation requests / waiving of amendment and cancellation fees • Encouraged to contact hotel if they still intend to travel/postpone/cancel • Encourage customers to do self-service on app • Refunds without penalties in case of cancellations
Symptoms	• Protocol for guests with symptoms • Protocol for staff e.g. front office asking guests when they arrived in the country; There is a monitoring system for any sudden symptomatic signs • Body temperature checks for guests on arrival • Response team including on call doctor
Operations	• Lock down hotel and maintaining a lower number of staff • Closing gyms • Payments using electronic means • Free room service • Home deliveries • Discounted accommodation • Some sections closed e.g. restaurants, pools, casinos etc. • Communication to guests and staff from local authorities
Staff	• Various working protocol e.g. sanitize on arrival, wearing of face masks and hand gloves, sanitizing own phones • Protocol for dealing with quarantined guests • Protocol on personal and family hygiene and cleanliness



4.12.3. (i) Cross Tabulations between Hotel Classes and Measures Taken

Majority of rated hotels have guidelines to staff on how to deal with COVID-19 epidemic. Major areas of communication are: increased cleanliness, disinfecting and sanitization of premises, equipment, and food; flexibility in bookings in terms of allowing cancellations, amendments without penalties; having in place guidelines on what to do in case guests or staff display symptoms; body temperature checks for guests and staff; interruption, slowing down of operations or temporary closure of premises and staff have been given extensive guidelines on interventions that are aimed at minimizing risk to employees, the premises and the business

From the data analyses, cross-tabulations between hotel classes and measures taken indicated that higher rated facilities were more interested in recovery of business. This is reflected in most of them ranking bookings and cancellations higher while the lower rated facilities ranked hygiene practices, implying business is still on so long as increased sanitation is observed (see Table 4.9).

Table 4.9: Cross Tabulations between Hotel Classes and Measures Taken

Rank / Measures Taken	5 Star	4 Star	3 Star	2 Star	Non-rated
1	Bookings and cancellations	Bookings and cancellations	Hygiene practices	Hygiene practices	Hygiene practices
2	Hygiene practices	Hygiene practices	Bookings and cancellations	Bookings and cancellations	Bookings and cancellations
3	Handling of symptoms	Handling of symptoms	Handling of symptoms	Operations	Operations
4	Operations	Operations	Staff	Handling of symptoms	Handling of symptoms
5	Staff	-	Operations	-	Staff



4.13 RECOVERY PATHWAYS

To recover from the severity of COVID-19, this study emphasizes the importance of the following measures.

4.13.1 General Recovery Pathways for Tourism Industry Players

Table 4.10: General Recovery Measures for the Tourism Industry Actors

1) Establishment of an emergency funds to help cushion the businesses in case of crisis like COVID-19.
2) Provision of grant by the GoK to help address the pending costs and reopen the businesses.
3) Tax relieves and incentives by the GoK.
4) Tourism Fund to provide SME's with the requisite funding to enable the businesses operate again.
5) Lift travel restrictions when the Ministry of Health allows it.
6) Aggressive marketing in potential markets.
7) Provision of stimulus package to help the businesses stay afloat.
8) Supporting the domestic tourism association. COVID-19 has brought international tourism to grinding halt leaving domestic tourism as best alternative for so many counties, Kenya not an exception.
9) Heightened tourism marketing activities to locals.
10) Provision of favorable tax policies that will encourage both the international and local tourists to travel tomorrow.
11) Provision of financial stimulus by the government. The GoK has provided KSh 500 Million for marketing. More of it should be directed towards marketing domestic tourism.
12) Development of products that can spread out people and at the same time isolate. Isolation as a result of COVID-19 will go on for a longer time, so products to cater for the isolation should be developed.
13) Product diversification. Kenya has for long being marketed as a destination for wildlife tourism. There is need to strongly support other products such as MICE tourism by developing more state of the art conferences and meetings venues.
14) Develop competitive airline packages that will encourage more Kenyans to move from one county to another for holidaying purposes. The current packages charged by the local carriers (both private and public) is not friendly to many Kenyans thus halting domestic tourism movements.
15) Increase marketing destination representatives and agents in existing and potential tourists' markets for Kenya.
16) Travel, tourism and hospitality businesses need to adjust their current rates not for the sake of profits, but for the sake of encouraging movements. With movements, employment in the sector will be back.
17) Economic support. The GoK to maintain the adjusted VAT and other taxies policies for a longer period post-COVID-19 pandemic to enable businesses to come back.
18) Lifting travel restrictions the soonest possible as and when allowed by the Ministry of Health.
19) Boosting consumer confidence through marketing and provision of incentives in order to hasten recovery.
20) Support and encourage participation of all tourism stakeholders in the currently set Global Tourism Resilience and Crisis Management Centre (GTRCMC) to put in place measures that will address other pandemics tomorrow.
21) Reconsider the national and counties' budgets by increasing funds directed towards supporting tourism SME's.
22) Development of Business Resilience Fund to provide interest free loans to tourism businesses affected by COVID-19 outbreak.
23) Stakeholders' involvement. Counties need to engage tourism consultants to give advice and innovation ideas, for example, in product improvement and diversification.
24) County governments' partnerships to develop affordable tourism packages that cuts across. This will encourage domestic/inter-county tourism.

4.13.2 Recovery Pathways for Hotels and Tour Companies

Kenya is already laying out plans for tourism recovery following the COVID-19, even if the country remains entangled in a crisis that threatens to tip the country economically this year. The tourism businesses and organizations should position themselves for recovery by crafting their strategies on bookings and members benefits as shown in Table 4.11 and Table 4.12.

Table 4.11: Cross Tabulations between Hotel Classes and Recovery Pathways

Rank / Recovery Pathways	5 Star	4 Star	3 Star	2 Star	Non Rated
1	Any Future Bookings	Any Future Bookings	Members Bookings And Benefits	-	Members Bookings And Benefits
2	Members Bookings And Benefits	-	-	-	-

Table 4.12: Recovery Pathways for Hotels and Tour Companies

Bookings	• Special discounted rates for bookings done in March/April. • Flexible booking policy. • Waiving cancellation/amendment fees depending on seasonality. • All booking/amendments made under flexible booking conditions must be utilized in the next 12 months. • Discounts if re-booked at certain off-peak dates.
Members benefits	• Members can maintain their status without fulfilling necessary qualifications/criteria. • Reduce membership criteria required. • Extension of membership plans and benefits / suspending points expiration dates. • Normal cancellation applies after 30th April, 2020. • Convert booking into points in lieu of travel.
Improve customer relations	• Offering discounts on bookings made during this time. • Having flexible booking policies including waiving cancellation and amendment fees. • Extending members' status without requiring them to fulfil necessary criterion. • Extending membership plans and benefits past their annual expiration dates.

4.13.3 Recovery Pathways for the Ministry of Tourism and Wildlife

i. Translate the fiscal, monetary and social measures into action through targeted action plans for the benefit of the tourism industry and track their impact on individuals and tourism businesses.
ii. Transform the tourism public sector through institutional reforms and re-engineering of tourism related government departments and agencies.
iii. Creation of a destination marketing system from the digitalization strategy to inform the product improvement and diversification process that speaks to domestic and regional markets in the short and medium terms and international market in the longer term.
iv. Undertake such researches periodically to continually inform government and its tourism stakeholders as the situation evolves.

4.13.4 Case Study Recovery Pathways

a) Kenya Tourist Board (KTB)

Despite a poor season from January till April 2020, Kenya's tourism industry is set to hopefully bounce back from June 2020 after the COVID-19 pandemic. Recovery strategies could include:

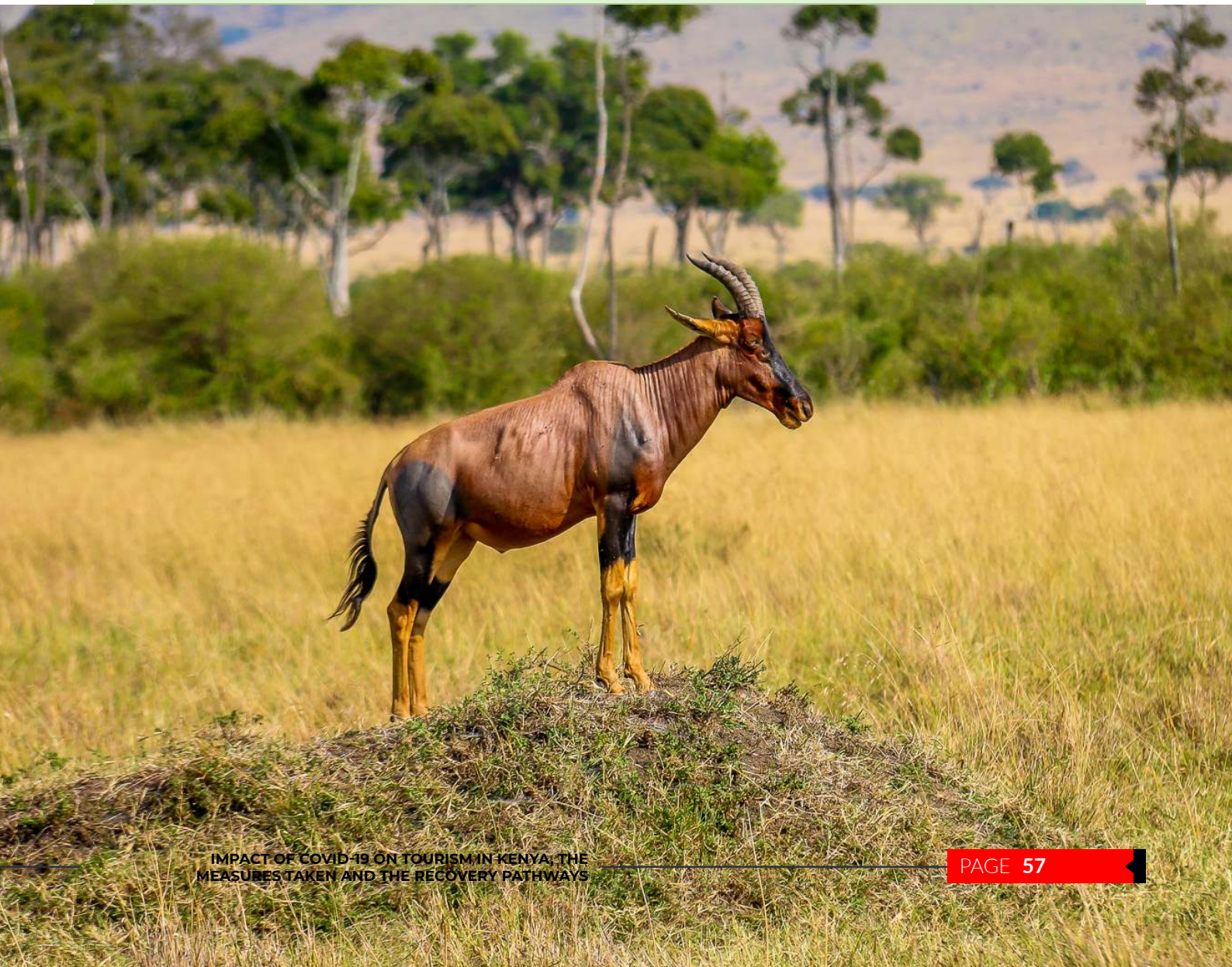
KTB Recovery Strategy April 2020 and Beyond	
KTB Plans -Immediate	KTB Plans – Post COVID-19 Plans
• Maintain continuous online destination visibility aligned to *Stay Home, Travel Tomorrow* messaging. (UNWTO Campaign message to support WHO messaging noting that tourism and travel has actively promoted spread of the virus). • Continuous tourism landscape assessment, collating stakeholder feedback, stakeholder engagements to give input to Tourism Recovery Strategy • PR strategy during the Crisis period in media platforms and digital platforms. • Identify themes that will remind people what is Magical about Kenya and inspire them to schedule their post Corona travel. • Rally industry to share content, stories, images, videos, testimonial alongside these themes. • Trade Webinars for the different markets. • Roll out e-learning Program in July 2020. • Patriotic message to Kenyans here and abroad that we are standing with them as our no. one market and also because they are the ones that create & deliver the magic (Target: Kenyans in general, the trade, non-tourism partners). • Develop a Tourism recovery strategy for the following: – Domestic market – Regional markets – Overseas Markets This will kick off in about 4 months.	• Aggressive demand creation in the domestic and international source markets. • Roll out of the Tourism Recovery plans across markets – The Big Idea. • Megafams for trade & Media. • TOPs – Co-op Marketing. • Influencer marketing for niche products/ experiences e.g. the tea/Flowers/Coffee/Athletes ambassador program/ campaign. • Synchronized Kenya themed Events in key source markets.
• Stakeholder mapping based on market re-prioritization (To determine whom to work with).	• Implement a sustained Marketing Incentive campaign with partners that would deliver the most impact in the source markets.



b) Kenya Association of Travel Agencies (KATA)

Strategy	Description	Needed Intervention	Expected Outcome
New business model	A New Business Model needs to be designed for the travel agents, and it must demonstrate its financial strength capacity, and the balance sheet health under an environment of doing business with the novel Coronavirus.	The MoTW to facilitate a linkage with business economists to study the current business model, and to recommend changes on the key drivers that would contribute to a more sustainable business unit.	Right alignment and allocation of business resources on the business drivers. Ability to measure results based on pre-determined KPIs.
Financial solutions	To address the business concern on working capital, there is need to have a Discounting Financial and Supply Chain Financing as an immediate solution for enabling trade-based on the principle that they shall be opening shop in a negative position.	The MoTW to facilitate funds from the national government, and to identify a partner financial institution that can disburse these through an interest-free/concessional rate loan scheme guaranteed by the government fund.	Travel products will become readily accessible to corporate and Government business partners, backed by the funding. This will create an immediate stimulation of consumption of travel products and fast track the recovery of the travel industry with an immediate impact of jobs being saved, and SME businesses in the sector recovering.
Jobs Creation through e-commerce Based Business Model	Undoubtedly, job losses in the Tours and Travel industry will contribute to an increase in poverty levels and a decline in the economy's GDP. However, the novel coronavirus has caused the leapfrogging of our economy into an active e-commerce economy that is heavily supported by mobile money financial services.	The MoTW to fund start-up businesses in the travel sector, with a payback principle upon achieving the break-even on the initial investment costs. Through government support and in partnership with banks and other financial institutions, develop a corporate credit card linked to the Tours and Travel transactions with a capped working capital amount to empower the start-up fund the initial	Low risk business model providing a technology aligned business model for the Youth and Women in the travel industry. Growth of employment levels within the industry driven by the Online Travel Agencies, thus contributing to poverty reduction and growth in Kenya's GDP driven by these SME businesses.

Re-skilling and Up-skilling	The New Normal has disrupted the art and science of doing business. To promote sustainable travel, training in understanding consumer behavior, behavioral economics, data analytics and a research-based business approach will be important.	The MoTW to provide a capacity building fund through Kenyatta University or other registered Universities to promote the re-skilling and up-skilling in the travel industry.	Mind shift in the approach to business and opportunities in the travel industry, with an aim to achieve efficiencies and rapid recovery of the travel industry.
E-commerce marketing	Building of consumer confidence is key owing to the underlying fear factor amongst travelers. Various aspects of experiential marketing, and placement, brand messaging will be key in retelling a new story for travel and destinations.	The MoTW to provide a fund through KTB to provide marketing support through Search Engine Optimization (SEO) and Data Analytics Tools that will strengthen the travel brands placement locally and internationally, and open opportunities to new market places for the sector.	Growth in re-building travel confidence, while building awareness on the new travel protocols amongst travelers. Additionally, this marketing should build long-term tourist demand for Kenyan travel and tourism products showcased.



c) Tourism Regulatory Authority (TRA)

a) Solve the Humanitarian Crisis	• The line of action would be to solve the humanitarian crisis. As such, in our response to this pandemic, we wish to echo the sentiments of the United Nations World Tourism Organization (UNWTO) of putting people and their wellbeing first. As a Regulator, we are highly concerned with the survival of the tourism businesses and the livelihoods of their employees. This calls for us to explore and put in place interventions that will enable MSMEs sustain their operations though in scaled down manner to enable them survive these turbulent times. As such, it is imperative that these businesses are supported to ensure that they are able to retain employees on the payroll for the next three to four months. This intervention will generate a positive ripple effect up and down the tourism value chain considering the great multiplier effect of tourism. Keeping tourism businesses solvent is key to saving jobs and limiting the adverse effects of these pandemic in the medium term.
b) Enhance Standards in the sector	• Going forward in the post covid-19 pandemic period, enhancing standards for tourism enterprises and food safety and hygiene will be the new normal. This will enable destination Kenya to build an image of a safe and hygienic destination in the international market place. As such, it is projected that this pandemic will play a critical role in destination choice thus shape travel patterns not only in the medium term but also in the long term. Therefore destinations embracing standards in their tourism and hospitality establishments, product offerings, real-time interactions and food safety and hygiene standards will have a competitive advantage. The Regulator will therefore give prominence to the development of enterprise standards for facilities and activities as listed in the 9th schedule, food safety and hygiene standards as well as standards governing real-time interactions between the customer and the service provider during the service encounter. • Regular quality assurance audits will be key to ensure that tourism and hospitality enterprises comply with the set minimum standards. • Tourism and hospitality enterprises will also be encouraged to go beyond the set minimum standards for them to be recognized by the Authority through an award of a "Mark of Quality" for excellence (an equivalent of the "super brand" in the manufacturing sector). This will bring additional benefits for the enterprises in that, their links in Authority's website will be interactive. This implies that a client looking for the list of registered enterprises will be able to log into the Authority's website and by clicking the respective enterprise's' link, they will be directed to the respective enterprises' website. This will link will therefore act as a powerful recognition and marketing platform. • Further the mark of quality denoting excellence will be used in all the promotional materials of the respective enterprises and internal communications thus consistently drive the desire of directors and employees in these enterprises to continually adhere and improve on their standards of their services and product offerings.

4.13.5 Proposed Immediate and Long-term Recovery Strategies for Tourism Industry Stakeholders

Despite a poor season from June 2020 after the COVID-19 pandemic. The recovery strategies from January till April, 2020, Kenya's tourism industry is set to hopefully bounce back are as shown in Table 4.13.

Table 4.13: Specific Recovery Measures for Tourism Industry

Issue	Short Term	Long Term
Market Assurance – KTB		
Domestic Tourism	Immediate promotion after the pandemic till July 2020 - Target weekend getaways	Continued promotion – May 2020 onwards
International Tourism	Target regional markets immediately after pandemic	Continued promotion – May 2020 onwards
Magical Kenya Brand	Continue working the print, electronic and digital media after pandemic – May 2020 KTB Marketing Budget to be enhanced – April 2020	Direct consumer marketing May 2020 and beyond in Key tourist source markets Continued engagement with international tourism trade through a mix of both - Above the line and below the line promotions May 2020 and beyond Revitalize Magical Kenya brand through continuous engagements with the print, electronic and digital media Conduct FAM trips for travel writers and tour operators Strategize Kenya's presence in OTDYKH, Moscow 2020; TOP RESSA, Paris 2020; JATA, Tokyo, 2020; MKTE, Nairobi, 2020; WTM, London, 2020; BIT, Milan, 2021; MITT, Moscow, 2021, ITB, Berlin, 2021 among other tourism fairs Direct digital media to consumer channels with a view to develop a new global audience strategy.
Incentives to Industry		
Charter Flights - MoTW, MoTransport	Partnership with Charter Flight companies – immediately after the pandemic and continued correspondence Waivers for landing fees (full/part) for Charter flights to the Coast from July 2020	Develop incentives for tourists Charter flights into Kenya -After pandemic onwards 5-year Collaborative partnerships and incentives deal for Charters from traditional markets
Financial Incentives – Treasury, CBK, MoTW	VAT reduced to 14% from 1st April, 2020	Maintain VAT reduction at 14% for at least 1 year Structured Policy on support to tourism industry during crisis – immediately after pandemic – May 2020, MoTW
Levy Collection - TF	Staggered 2% Levy Collection by TF - immediate	Resume normal collection in Jan 2021
Pending Bills – MoTW, TFC, KPLC, Water and Sewerage Companies	Lobby for staggering of tourism industry business payment of utility bills – Immediate	Help tourism businesses avoid bankruptcies through special fund to aid in settling bills with suppliers – April 2020 onwards

Issue	Short Term	Long Term
Product Improvement and Diversification		
Product Improvement – MoTW, KWS, NMK, KFS, TFC, Private Sector	Survey on industry needs by MoTW, TRA, TFC – Immediately after pandemic Develop ideas for wellness and leisure facilities Position Kenya's visitation in June 2020 by promoting the Masai Mara Wildebeest Migration – Immediately after pandemic	Incentives to refurbish tourism facilities and attraction in readiness for re-opening of the sector in June 2020 Develop new tourism products – April 2020 onwards Promote beach tourism and warm weather – July 2020 onwards
Information and Research		
Information and Research – MoTW, TRI, RCMC, KU, Academia	Develop a tourism Risk Management data collection toolkit – Immediate Ensure crisis reporting is done dutifully by all tourism industry stakeholders – Immediate Link MoTW/Magical Kenya website to Ministry of Health and WHO website – Immediate To Map out primary, secondary and tertiary tourism elements in Kenya using GIS technology – Immediate	Fully functional National Tourism Crisis Steering Committee and Resilience Centre - Immediate Quarterly data analysis and reporting of all reports from industry Policy briefs when necessary Quarterly Monitoring and evaluation on policy mitigation measures Continuous update of MoTW website To establish a GIS database of tourism products and services in Kenya
Partnerships		
Partnerships MoTW, Parastatals, KTF, KATO, KAHC, KATA, Academia, Private Sector	Regular Tourism multi-sectorial committee briefings – Immediate	Quarterly Tourism multi-sectorial committee briefings Develop Kenya's Tourism competitiveness framework
Training – MoTW, TF, Academia	Develop module to ensure all tourism stakeholders receive training on crisis reporting and management – May 2020	Sector- specific countrywide training on crisis management – August 2020





5 CONCLUSIONS AND RECOMMENDATIONS

5.1 CONCLUSION

The increasing intricacy and interconnectivity of global events require governments to work with the private sector so as to improve their preparedness to mitigate the impact of the crises, their management to efficiently address the crisis as well as enhance their responses to ensure a speedy recovery. About 90% of economic losses during any outbreak arise from the uncoordinated and irrational efforts of the public to avoid infection. In this context, it is essential to enhance coordination and cooperation to make sure people are safe from a health perspective but also an economic one.

The world will move on after Covid-19 but the insights gained from it should be valuable with comparable infectious disease threats presenting continuously. The SARS outbreak brought China virtually to a standstill, forcing the country to thoroughly review its infectious disease control policies. Since then, the Chinese government has implemented innovative strategies, strengthened the related aspects of the legal system and the disease prevention and control system, and made substantial investments to improve infrastructures, surveillance systems, and emergency response and preparedness and response capacity, such as development of a real time monitoring system that is now serving as a model or worldwide surveillance and response to infectious disease threats.

5.2 RECOMMENDATIONS AND WAY FORWARD

Once the situation has stabilized it is expected that there will be a rapid recovery, since travel demand has proven resilient in bouncing back from downturns in the past. Travel levels are expected to fully recover by 2023. In the meantime, KTB and private stakeholders should use the opportunity to keep their brands at the front and center on social media and through public relations. DMOs and companies are now focused on developing robust recovery communications plans, to ensure they are locked and loaded as soon as the all-clear is given.

5.2.1 Recovery Pathways for Kenya

Despite a poor season from January till April, 2020, Kenya's tourism industry is set to hopefully bounce back from June 2020 after the COVID-19 pandemic. Key recovery strategies emanating from various stakeholders include:

A. Domestic tourism growth

B. Regional tourism growth

C. Pricing Revision for Tourism Products in Kenya

D. Product Improvement and Diversification Strategy

E. Packaging tourism information and experiences

F. Pricing revision for Tourism Products in Kenya

G. Fight against the Spread of Disinformation

H. Digitizing Travel and Tourism Industry in Kenya

5.2.1. A. Domestic Tourism Growth Strategies Implementation Matrix

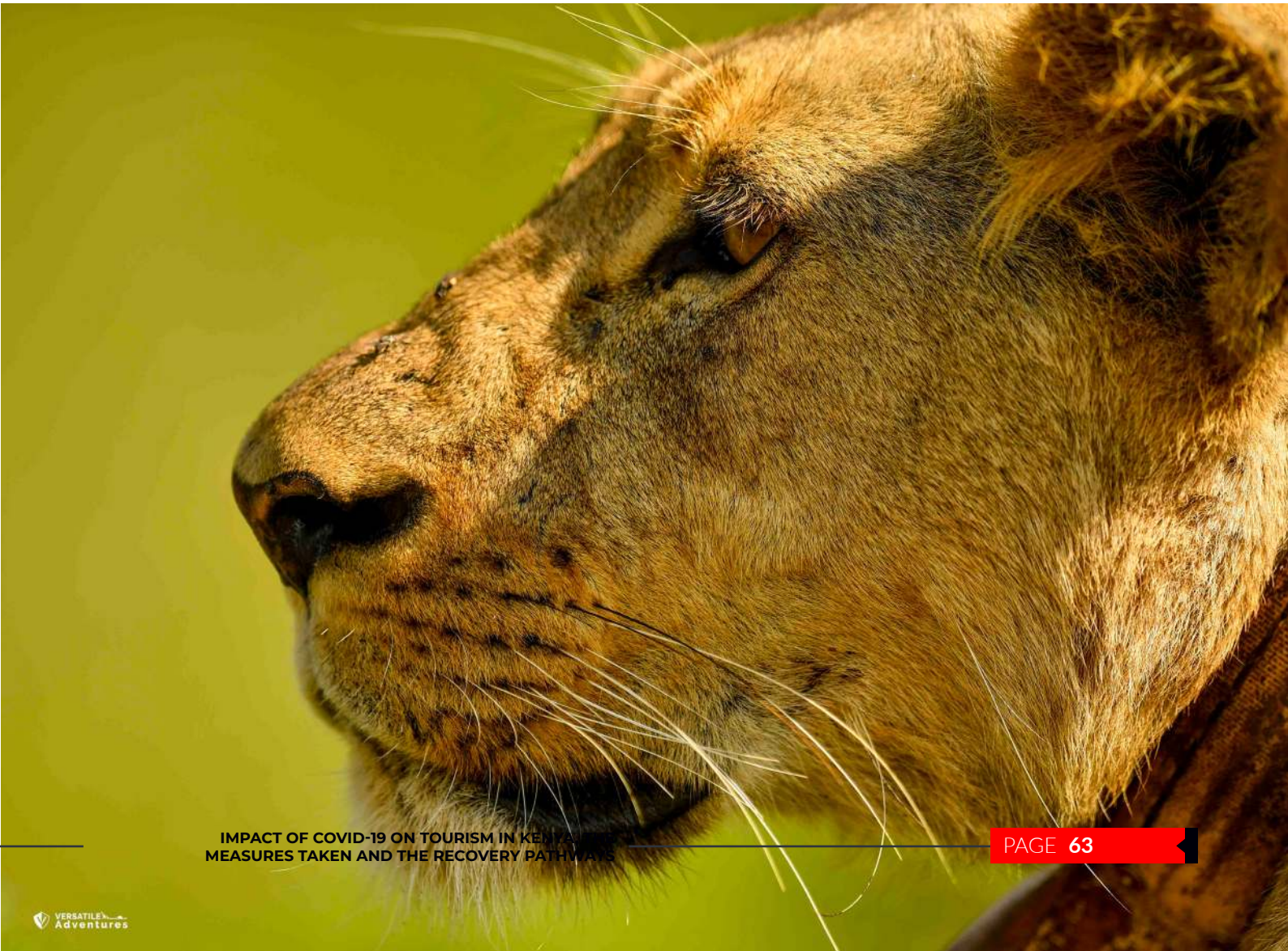
There is need to tap into Kenya's growing domestic tourism market as part of the post COVID-19 recovery strategy. In Kenya, domestic tourists' bed-night occupancy accounts for more than 50% of the Bed Occupancy from 2015-2018). The number of domestic tourists bed-nights has increased from 2,948,000 in 2014 to 4,559,000 in 2018 as indicated in Table 5.1 (KNBS, 2020).

Table 5.1: 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)*

Domestic tourism has shown more resilience to external negative impact than international tourism. 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, 21 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). 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 nights (Oxford Business Group, 2017). 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. On the other hand, domestic tourism bed-nights increased by 6.5% from 2,948,700 in 2014 to 3,154,100 in 2015. Box 5.1 and 5.2 presents the efforts in promoting domestic tourism and reasons for expanding domestic tourism in Kenya respectively.



Box 5.1: 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 Ministry of Tourism and Wildlife (MoTW) as well as local travel agencies have been involved in a coordinated 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 parastatals responsible for marketing tourism for the country, the Kenya Tourism Board (KTB) such as Magical Kenya's Tembea Kenya.

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 $300,000 SMS campaign aimed at drawing in new domestic travelers, 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 been active in developing 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 travelers 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 Travel provide 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 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, although this is partly attributable to a broader decline in hotel occupancy and arrivals. 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.

Box 5.2: 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 least-visited rural areas, bridges the seasonality gap and creates employment opportunities.

Domestic tourism can play an important role in improving the attractiveness of destinations, which in turn promotes well-being for locals and helps to attract the educated young professionals upon which high value-added sectors increasingly depend (WTTC, 2018). 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).

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.

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, 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.

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 (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 5.2. 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.

Table 5.2: Distribution of Monthly Wage Employment Income (KSh.)

Year/Income	0 - 9,999	10,00-14,999	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
Percentage 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 is 1,040,904 people (KNBS, 2020), as shown in Table 5.3. These are potential domestic tourists that the country's tourism industry could attract.

Table 5.3: Distribution of Monthly Wage Employment Income (KSh.) by Sector

Industry	0 - 100,000+	50,000 – 99,999	100,000 +	50,000 +	% 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 5.4 shows a list of factors that hinder Kenyans from involving in domestic tourism and Strategies to Raise the Contribution of Domestic Tourism in Kenya Post COVID-19.

Table 5.4: Threats and opportunities for Domestic Tourism Post COVID-19

Hindrance to domestic tourism in Kenya	Strategies to Raise the Contribution of Domestic Tourism in Kenya Post COVID-19
• Lack of knowledge by the locals • Negative perceptions that tourist destinations are for the rich and foreign • Lack of own transport • Less hospitable treatments to local tourists by service providers Unfamiliar food types in hotels Marketing that does not resonate with local people • Lack of disposable income and free time	• Tourism Marketing and Promotion Campaigns • Infrastructure Development and Betterment • Diversification of the Tourism Products and Markets • Strong Partnerships and collaboration • Image Rebuilding and Destination Repositioning • Review Taxes, Charges, Levies and Regulations Impacting Transport and Tourism • Ensure Consumer Protection and Confidence • Campaigns to Encourage Domestic Tourism • Pricing Initiatives • Provide Direct Incentives • Provide Financial Stimulus for Tourism Investment and Operations • Enable Leisure Policies

Table 5.5 presents the responsibility matrix for implementation of domestic tourism growth strategies.

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 • Value added products to domestic tourism packages with free added products for consumers such as bonus meals, sightseeing, and entry to attractions	• MoTW • KTB • Private Sector
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

Domestic tourism growth Strategies		Implementation	Responsibility
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 locals and that paid by international tourists	Revise pricing in rated hotels and premier parks for the domestic market	• Private Sector • KWS • KTB • 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

Domestic tourism growth Strategies		Implementation	Responsibility
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	Promotion of domestic tourism across counties	• National Government • 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

Domestic tourism growth Strategies		Implementation	Responsibility
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

5.2.1. B. Promotion of Regional Tourism

A total of 825,489 regional tourists from Africa and Indian Ocean visited Kenya in 2018 accounting for 40.76% of the total international tourists, which shows a huge potential for growth, as highlighted in Figure 5.1.

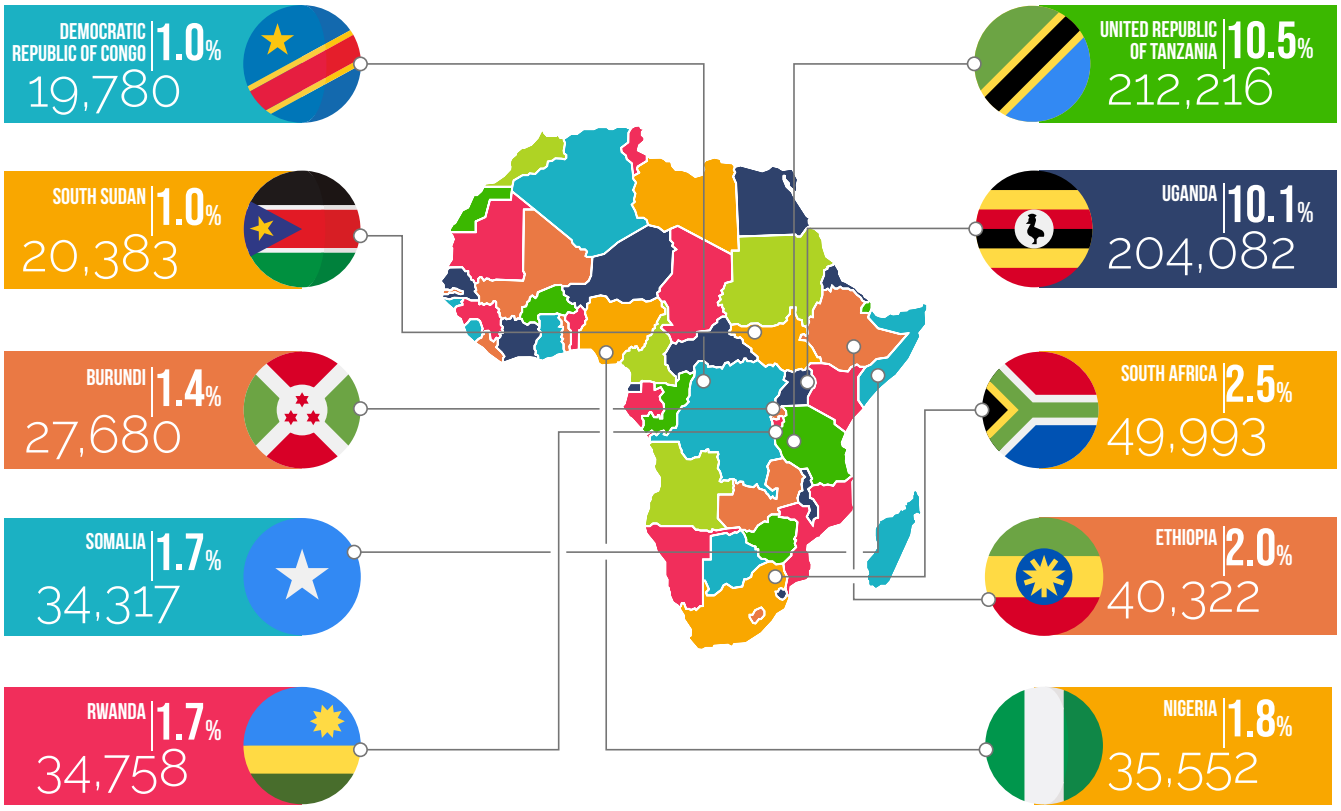


Figure 5.1: Top 10 regional tourists' source markets
Source: MoTW (2018)

5.2.1. C. Pricing Revision for Tourism Products in Kenya

A major challenge facing the tourism industry in Kenya is the relatively high price of the tourism products. There is need for a study to determine the best prices for hotels, parks, attractions etc. through economic models, in order to remain competitive. Prices for commodities with markets (such as hotel rooms, food and drinks, and transport and communication) can easily be derived through traditional business pricing methods. The current pricing methodologies in the country borrow heavily from the Willingness to

Pay/Accept concept. Willingness to pay (WTP) is the maximum amount a person would be willing to offer for a good/service. Willingness to accept compensation (WTA) is the minimum monetary amount required for an individual to forgo some good, or to bear some harm. The optimal price of any non-market commodity is any point between a buyer's willingness to pay (tourists/visitors) and a seller's willingness to accept compensation (tourism organizations/ institutions). Non-market commodities in tourism include especially nature/ environment-based resources such as parks/ reserves, recreational spaces, and museums.

A review of such studies based on WTA and WTP will be helpful to Kenya as a destination, since tourism resources such as parks, reserves, and museums are largely non-market based. However, the pricing of human-made facilities/ resources such as accommodation and transport can be analyzed using the usual traditional market-based approaches. The three most applied methods for measuring WTP are (i) Contingent valuation (ii) experimental auction and (iii) conjoint analysis.

Finally, cases of decline by 10%, 20% ,30%, 40% and 50% are considered and due to the resilience of Kenya's tourism industry a post-COVID-19 spike on park visitation is possible (Figure 4.16) both at annual and monthly bases of analysis. If proper recovery pathways are taken, then the industry could return to pre-COVID-19 level by 2021 as seen in Figure 5.2.

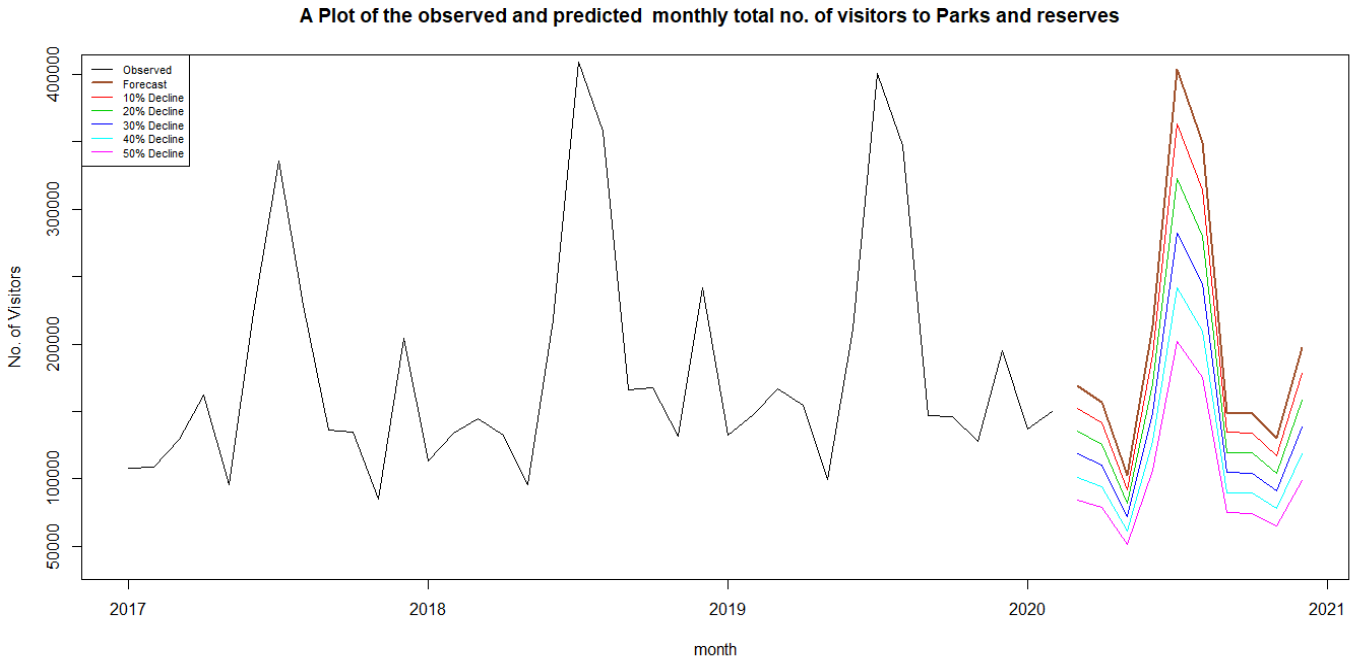


Figure 5.2: A Plot of the Observed and Predicted Monthly Total No. of Visitors to Parks and Reserves

5.2.1. D. Product Improvement and Diversification Strategy

Kenya's key tourism products have mainly centred on African Safari and beach destinations. This is due to the fact that, the country is well endowed with a long coastline and a diversity of wildlife species. Over the years, there has been over dependency on the nature based products as the main source of tourism revenue and over 80 percent of the industry's earnings are driven by nature based tours. Whilst recognizing the importance of Nature based products, much effort is needed to diversify the industry to include a wide range of other products. Box 5.3 details the product improvement and diversification strategy.

Box 5.3: Product Improvement and Diversification Strategy

Kenya ought to establish plans to improve, develop, re-package, diversify and promote other tourism products instead of relying solely on Africa safari and beach destinations, as part of efforts to boost the tourism industry domestically, regionally and internationally. There is urgent need to improve Kenya's core products: beach and wildlife tourism to ensure that the country offers value for money to both domestic and international markets.

Tourism product improvement and diversification may further consider various aspects such as strengthening Meetings, Incentives, Conferences and Exhibitions (MICE) tourism, birding, cultural tourism, agro-tourism, adventure tourism, Sports tourism products and many others, in relation to the market demand and the resource base of Kenya. The newly formed Kenya National Convention Bureau (KNCB) is expected to market Kenya as a top Meetings, Incentives, Conferences, and Exhibitions (MICE) destination both locally and internationally. The bureau will focus on strengthening Kenyaɔs position as a preferred meeting destination and enlist support for re-growth the MICE travel by incorporating key markets. Different tourism should also be value enhanced and developed in order to attract different international and domestic tourists. Cultural festivals and homestays are a growing trend that could be packaged to offer cultural experiences. Generally, this process entails improvement of the existing products, diversifying to other products and markets and sustaining the new and improved products.



Post-modern tourists are gradually becoming aware of the negative impact of mass tourism and are increasingly looking for alternative tourism products that provide a deeper and more meaningful experience. Thus, if Kenya is to rejuvenate its tourism industry there is need for the country to provide a diverse alternative tourism product which are more appealing to the post-modern tourists. Some of the key areas of diversification include:

- Business and Conference Tourism
- Cultural and Heritage tourism

- Home Stays, Airbnb and general sharing economy concept
- Health and wellness tourism
- Medical Tourism
- Ecotourism
- Sports tourism
- Shopping tourism
- Avitourism (Birding)
- Photography
- Volunteerism (Communities and wildlife/ nature conservation)
- Flora related tourism

Box 5.4 details the product improvement and diversification recovery strategy amidst COVID-19 pandemic.

The following projects could be implemented in Kenya to improve and diversity tourism products:

1. Packaging tourism information and experiences
2. Geospatial presentation of Tourism resources in Kenya
3. Identification and promotion of community-based tourism
4. Identification and promotion of new and improved product and link to the market

1. Packaging tourism information and experiences

Kenya as a destination needs to package information on tourism products through the process of knowledge capturing. Knowledge Capturing is the process of converting the knowledge that resides in people's minds, and elsewhere, into tangible, explicit knowledge assets. This will involve recording experiences from all forms of tourism in Kenya in a format that can be stored, further processed, adapted, and shared within and outside the destination.

The packaged information from knowledge capturing and other sources will then be shared in form of media such as text, audio, videos, images, graphics, etc. Different media could be used that includes website, social media, emails, narratives at the attractions etc. This information will add value in product packaging and marketing, and prolong the product life cycle in line with the recommendations given in the National Tourism Blue Print 2030.

2. Information Provision and Geospatial presentation of Tourism resources in Kenya

In line with making Kenya more resilient to crises, one of the areas that the country could hugely improve on is in the mapping of tourism resources in the country. This will determine the spatial quantity, capacity, quality, status and distribution of tourism attractions, amenities, activities, accessibilities and ancillary services around the country that will be accessible across the world. The ultimate goal is to create an Integrated Tourism Management System with updated content from all the stakeholders. This will ultimately increase the country's market share and assist with product diversification. The content will also improve the country's Travel and Tourism Competitiveness Index, which currently stands at position 82.

Details of the product improvement and diversification recovery strategy implementation matrix are shown on Table 5.6.

Table 5.6: Product improvement and diversification

Product Improvement and Diversification Strategies		Implementation	Responsibility
Packaging tourism information and experiences			
1.	Improvement and packaging of existing and new products and markets	Enhance and package the following new and improved products: • Beach tourism • Wildlife Tourism • Business and Conference Tourism • Cultural and Heritage tourism • Homestays, Airbnb and general sharing economy concept • Health and wellness tourism e.g. hot springs, natural forests and products linked to traditional healing, use of natural medicines etc. • Medical Tourism • Ecotourism • Sports tourism • Shopping tourism • Avitourism (Birding) • Photography • Voluntourism (Communities and wildlife/nature conservation) • Flora related tourism	• KTB • County Governments • Private Sector
2.	Develop new facilities and refresh and revamp existing facilities	• Identify gaps in the supply of new types and standards of accommodation, e.g. self-catering and timeshare facilities • Diversify the accommodation base in national reserves/parks and conservation/protected areas, e.g. self-catering, expand and upgrade camping facilities	• Private Sector • County Governments
3.	Enhance and expand types of activities	• Improve on the existing activities and introduce new ones in parks and reserves, such as biking, walking, cultural experiences, special interest tours (e.g. birds, trees, and insects), etc. • Enhance existing adventure activities and expand the types of activities offered at key nodes, e.g. through activity centers, to include: **a.** Mountain/rock climbing **b.** Hiking **c.** Mountain biking **d.** Slackpacking **e.** River rafting **f.** Zip lining/bridge swings/bungee jumping **g.** Scuba diving **h.** Entomology **i.** Scientific research	• KTB • Private Sector • County Governments
4.	Knowledge capturing	• Capture knowledge from people's minds into tangible, explicit knowledge assets. • Record experiences from all forms of tourism in Kenya in a format that can be stored, further processed, adapted, and shared within and outside the destination. Media	• TRI • Academia • KTB • Private Sector • County Governments

Product Improvement and Diversification Strategies		Implementation	Responsibility
		formats will include video, images, and graphics. • Include interpretation at the visitor Centers • Integrate story telling into existing tourism experiences	
5.	Product packaging	• Development of a comprehensive tourism products and services database • Development of Packages or itineraries which will provide a one stop shop, at one, fairer all-inclusive price. • Create new experiences through packaging, to give a competitive advantage through marketing or advertising The following are a range of products and services that can be linked in a package: • Food and beverage • Accommodation • Built attraction – museum, art gallery, theme park etc. • Natural attraction – waterfalls, scenic vistas etc. • Transportation • Programming – gourmet cooking, tea/coffee tasting, wood carving etc. • Guided tour • Entertainment – theatre performance, stage show, concert • Event/festival • Shopping • Activity – hiking, kayaking, alpine skiing, snowmobiling • Local culture	• KTB • Private Sector
6.	Promotion of tourism products	• Link products to the right market type and segment • Promote the development of authentic Kenyan products • Collaboration to assist with bidding for international conferences and meetings • Employ targeted marketing to niche tourism segments such as targeted advertising and packages tailored to each niche segment	• KTB • Private Sector
Information provision and Geospatial presentation of Tourism resources in Kenya			
7.	Information provision and Mapping of tourism resources in Kenya	• Determine the spatial quantity, capacity, quality, status and distribution of tourism attractions, amenities, activities, accessibilities and ancillary services around the country that will be accessible across the world • Conduct an inventory assessment of heritage assets and identify existing sites/products that require improvement • Develop a visitor information and interpretive strategy and policy (includes directional, information and interpretive signage). • Improve the extent and quality of visitor information provided for when in the	• TRI • Academia • KTB • Private Sector

		reserve, e.g. improved visitor guides, additional and better-quality maps with suggested routes and travel times • Develop visitor centers at strategic locations to serve as activity hubs (with activity operators and guides), information centers and provide services to visitors (i.e. food • and beverages, shopping such as crafts and basic provisions) • Develop and improve Apps that facilitate and provide comprehensive information across all modes of transportation nationwide. This will make trip bookings, journey planning and navigating around Country easier for free, independent travelers through the use of smartphone apps and other technologies. The App will give suggestions and navigate tourists to attraction sites at ease. • Employ technology in marketing tactics such as devising applications for marketing promotion as well as monitoring and analyzing post-travel reviews and feedbacks on online media, by setting up an entity/a department that will be responsible of all online interactions. • Resolve negative reviews and complement positive reviews, provide incentives for tourists to post reviews, such as discount for entrance fees/at souvenir shops, and conduct analysis and recommendations for the marketing team	
8.	Activities, attractions, amenities, accessibilities and ancillary services mapping	*Case of Activities mapping* **1)** Compile a database of tourism-related activities taking place across Kenya **2)** Classify activities by type and significance (i.e. international, regional, national, local and community) **3)** Identify existing activities with potential to grow in significance and develop strategies to achieve growth **4)** Improve the geographic spread of activities **5)** Improve the spread of activities during the year **6)** Create signature activities **7)** Identify important activities codes that are already established in Kenya **8)** Develop an activities policy (classification of activities, funding mechanisms, support that can be provided at national and county level etc.)	• TRI • Academia • KTB • Private Sector

Product Improvement and Diversification Strategies		Implementation	Responsibility
Pricing Revision for Tourism Products in Kenya			
9.	Set the best prices for non-market commodities	• Non-market commodities in tourism including nature/ environment - based resources such as parks / reserves, recreational spaces, and museums	• MoTW • TRI • Academia • Private Sector • County Governments
10.	Recommend the best prices for commodities with market	• Commodities with markets (such as hotel rooms, food / drinks, transport / communication) that can easily be derived through traditional business pricing methods.	• TRI • Academia • Private Sector
Identification and promotion of community-based tourism			
11.	Promote community-based tourism	• Identify opportunities for community-based tourism to be developed and improved around wildlife, nature and scenic products • Promote engagement with host communities in development and management of community-based tourism or CBT such as agricultural tourism, horticulture tourism and homestay tourism. • Raise awareness of values and benefits of local heritage among the host communities such as promoting the benefits of tourism industry, training in communication skills, and educating them on how to benefit from their local attractions and cultures	• TRI • Academia • KTB • Private Sector
12.	Adapt the Albergo Diffuso model in rural Kenya	• Development of unutilized rural homes for tourism	• TRI • Academia • County Governments
Institutional structure			
13.	Improve on the role of the National and County Governments in tourism management	• Encourage County governments to be more involved in developing tourism in their counties • Clear identification of roles and responsibilities of the county Tourism departments and clearly define the scope of work and accountability of each entity • Training of County representatives responsible for tourism • Clear reporting mechanism should be designed to streamline the communication process between the National and the county governments by defining reporting lines and monitoring mechanisms including scope and occasion for intervention by national government and the procedure to	• MoTW • County Governments

	Product Improvement and Diversification Strategies	Implementation	Responsibility
		address project derailment/implementation • Include host communities for inclusivity in tourism development. Hold regular meetings between county governments and the communities to discuss issues related to tourism development. Online platform for ideas sharing can be explored.	

5.2.1. E. Packaging Tourism Information and Experiences

Kenya as a destination needs to package information on tourism products through the process of knowledge capturing. Knowledge Capturing is the process of converting the knowledge that resides in people's heads, and elsewhere, into tangible, explicit knowledge assets. This will involve recording experiences from all forms of tourism in Kenya in a format that can be stored, further processed, adapted, and shared within and outside the destination. Media formats will include video, images, and graphics. The packaged information from knowledge capturing and other sources will then be shared in form of media such as text, audio, videos, images, graphics, etc. Different media could be used that includes website, social media, emails, narratives at the attractions etc. This information will add value in product packaging and marketing, and prolong the product life cycle in line with the recommendations given in the National Tourism Blue Print 2030, developed by the Ministry of Tourism and Wildlife in 2017.

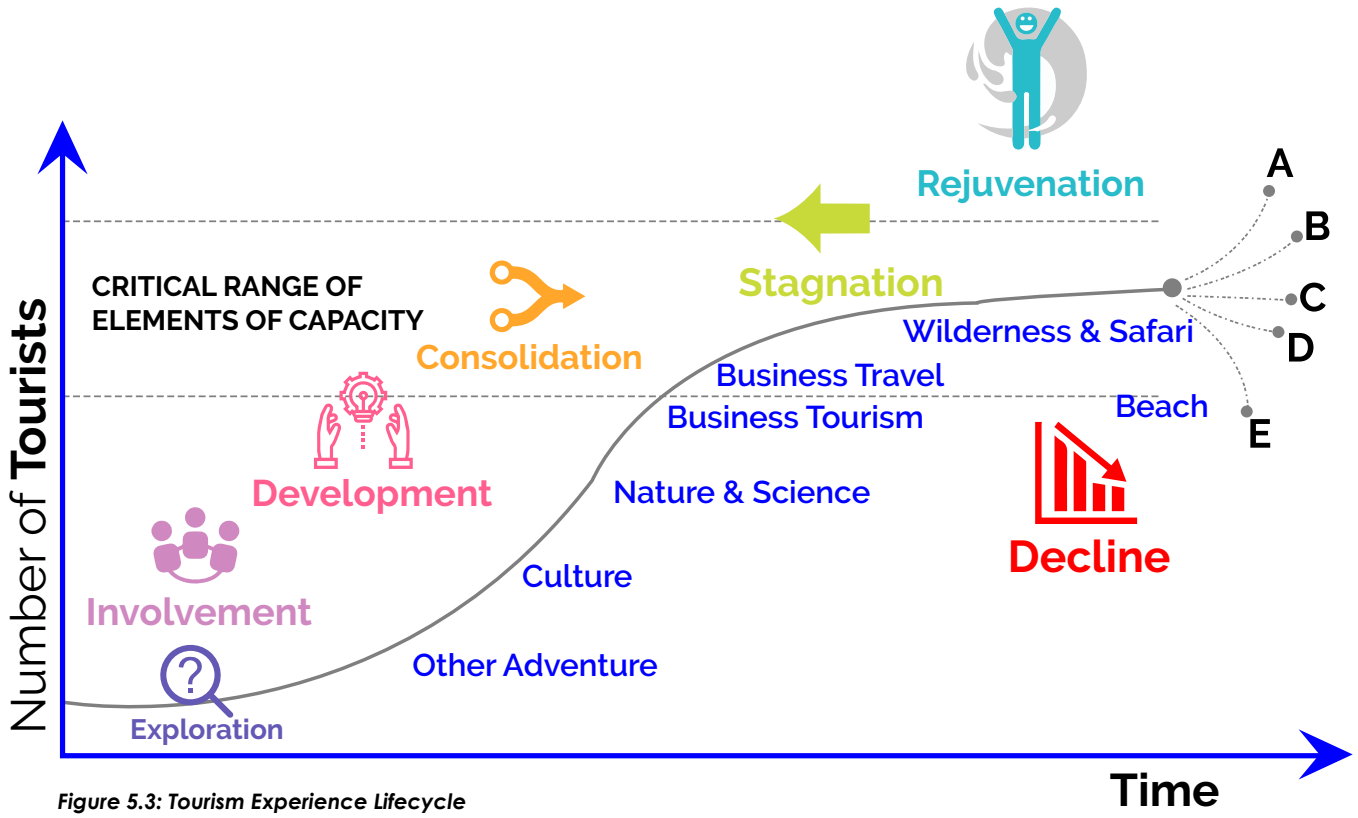


Figure 5.3: Tourism Experience Lifecycle
Source: Butler (1980)

5.2.1. F. Pricing Revision for Tourism Products in Kenya

A major challenge facing the tourism industry in Kenya is the relatively high price of the tourism products. For the country to achieve the pre-COVID-19 levels, optimal price between the visitors' willingness to pay and the service providers' willingness to accept compensation should be considered. Willingness to accept compensation (WTA) is the minimum monetary amount required for an individual to forgo some good, or to bear some harm. This implies that concessions will have to be made by Government and service providers on the best price to offer visitors for tourism products and services. The resilience of Kenya's tourism industry in the past crises is evidence enough that the country can experience a post-COVID-19 level by 2021 spike on visitor arrivals to the various attractions and facilities, if the proposed recovery pathways are considered. The challenge is to ensure that other pricing factors are placed into consideration. There is need therefore for a study to determine factors that would guarantee the best prices for various service providers through economic models, in order for Kenya to remain competitive.

5.2.1. G. Fight against the Spread of Disinformation

The Eastern Africa countries must fight against the potential spread of disinformation about the safety of travel to their region, and by extension to Africa (The East African, 2020c). Efforts to control COVID-19 on the region must take cultural norms into account and must address the potential stigmatization and isolation of individuals with the infection (Boston Consulting Group, 2020). Key organizations and structures-including community and faith-based organizations, village leaders, and local governments-need to be involved in the effort from an early date to support the response and to help tweak it for maximum effectiveness in each local context.

5.2.1. H. Digitizing Travel and Tourism Industry in Kenya

Digitalization is causing transformations across multiple aspects of businesses, providing exceptional opportunities for value creation, and business leaders across all sectors are grappling with the strategic implications of these transformations for their organizations, industry ecosystems, and society (World Economic Forum, 2016). According to UNCTAD (2019), digitization is an important aspect of today's economies, and various sectors are taking advantage of Information and Communication Technologies (ICTs) to enhance their businesses and brands. The travel and tourism industry is evolving rapidly and the business players in the industry need to embrace the latest trends and development in order to stay competitive and one of such trends is digitization.

Digitization is good for planners and practitioners within the tourism industry and the use of Information and Communication Technologies (ICTs) can provide competitive advantages in promotion, as well as strengthen the strategies and operations of the tourism industry (Buhalis & Amaranggana, 2013). ICTs have the potential to increase a destination's revenue; develop and reinforce local tourism and tourism-related entrepreneurship and activities; develop genuine tourism offerings that rely on local productions and traditions and enable direct promotion and commercialization of local tourism offerings in international markets reducing dependence on big foreign intermediaries (Asafe et al., 2013). ICTs allow destinations to improve online presence and offline connectivity such as collaboration as well as inter-sectorial linkages among local public and private tourism and tourism-related actors required to compete in today's global tourism market (Okon, Agbogun, & Yusuf, 2017).

5.3 SPECIFIC RECOMMENDATIONS FOR VARIOUS STAKEHOLDERS

Particular recommendations for various tourism stakeholder are presented in Box 5.5.

Box 5.5: Specific Recommendations for Various Tourism Stakeholders

i) Ministry of Tourism and Wildlife (National and County levels)

- There is need to spearhead implementation of innovation in the tourism sector. The MoTW should lead in policy making to encourage entrepreneurs and innovators with ideas that are developed and ready to be put into action for recovery of the industry. Such ideas that will help the industry recover from this crisis, economically and socially, as well as contribute to the public health response. This will ensure the large number of lost employment opportunities are recovered. Counties need to engage tourism consultants to give advice and innovation ideas, for example, in product improvement and diversification.
- County governments' partnerships should develop affordable tourism packages that cuts across. This will encourage domestic/inter-county tourism.
- The MoTW should see how the government could initiate tax reduction schemes (for certain period of time) for both micro and macro level business owners, in terms of introducing interest-free capital loan schemes, reduction of licensing fees among other measures.
- There is an urgent need for the MoTW to encourage tourism operators to engage with crisis preparedness and disaster-management strategists and it is important to gain a better understanding of the consumer response to disastrous event by all components of the value chain. This is one of the key element which currently not in the corporate plans of many business organizations.
- All possible communication channels should efficiently remain opened between key tourism and hospitality stakeholders and the local and regional public health authorities as part of a proactive strategic response plan. Announcements and advices from global institutional structures such as UNWTO and WTTC in order to recover the industry level globally should be implemented.
- The MoTW should lobby for longer term actions such as simplification of visa rules, reducing or waiving travelers' taxes and supporting economically hit destinations with promotion and marketing to attract tourists. This will enable the country to have a competitive edge in terms of visitor support and therefore encouraging international visits.

ii) Accommodation Providers and Restaurateurs

- It is recommended that they should look into ways of revise their rates slightly downwards without affecting their operating costs. Hence, it would be a great opportunity for both local and international tourists to visit a hotel or to consume services in a hotel with much lower prices.
- Because of the situation emanating from the pandemic, customers are now very much concerned about their health and safety. Thus, putting some extra efforts and taking some additional time in cleaning is essential. This will ensure customers of hygienic, clean, safe and secure environment for their stay.
- Additionally, this research recommends that accommodation providers and restaurateurs should have collaborative initiatives among themselves and between them and other public and private organizations. It is important for collaborative synergy in the industry. Due to the dwindled revenues, accommodation providers should consider collaborative marketing efforts among themselves in a particular destination. On the other hand, the government could initiate tax reduction schemes (for certain period of time); financial institutions could think of introducing low-interest capital loan schemes and not putting a lot of pressure on existing loans.
- Challenges could also occur in the utilization of full capacity of human resources. Hotels should encourage employees to be ready to come to work and engage in consumer

related activities in trying to restore business. They should enlighten employees that it is through restoring business that they would be able to resume full employment capacity; without making them feel exploited. This confidence should be implemented within the workplace with proper mechanism to enhance the employees' confidence as well as sufficient internal and external motivational strategies.

- The government through the MoTW needs to work with the private sector to promote fair arrangements for customers after the 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.

iii) KTB/KNCB/Brand Kenya

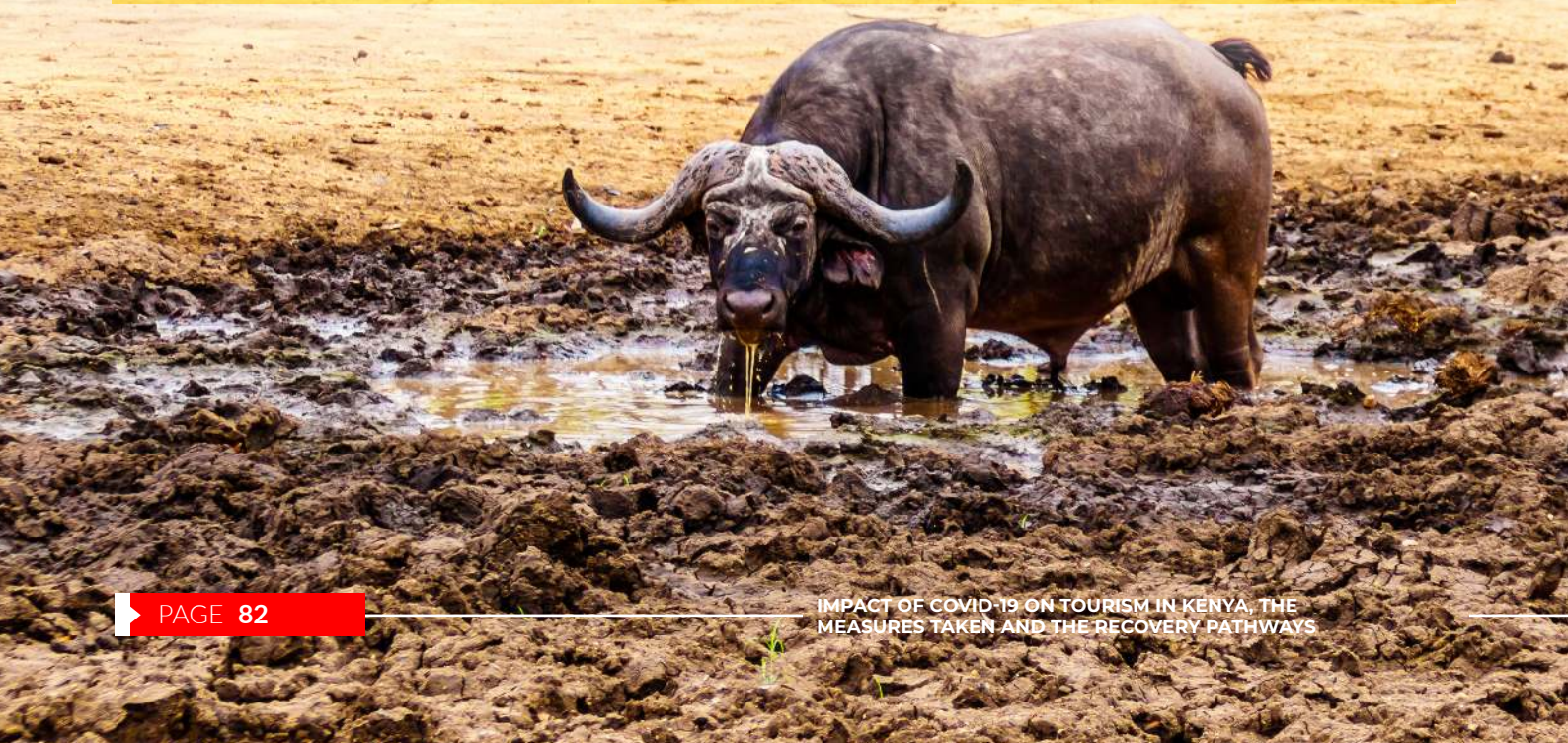
- National tourism bodies such as Kenya Tourism Board, Kenya National Convention Bureau (KNCB), Brand Kenya (BK) etc., should engage a globally driven destination marketing and branding that systematically evaluates and reviews the state of tourism in the country with properly highlighting the best practices applied in the crisis situations from the past, future forecasts to encourage private sector. Most importantly, the PPP approach is much more appropriate for this effort. Research and development activities should be encouraged in collaboration with academia to open up the hidden cornerstones.
- Further, local-global collaboration is essential in the recovery process. A strong linkage should be put in place between hospitality and tourism organizations, supportive services and destination management organizations. Local residents and other important tourism stakeholders should be well informed and encouraged to carry out healthy ethics of care to minimize the public uncertainties and risks.
- National tourism bodies should continuously collaborate with the global level tourism bodies to help the tourism industry prepare and respond to global health emergencies.
- KTB should collaborate with other stakeholders to rebuild trust from both domestic and international travelers after the crisis. It should arrange for familiarization trips for local and international journalists and bloggers showing in real-time that the area is safe and pleasant to visit.
- Locally, the DMOs should develop public relations strategies and implement them at a community level to talk about the benefits of tourism and to remind people to welcome tourists when the time is right. Aggressive marketing campaigns are needed to enlighten the locals on visiting the touristic sites in the country, and further the benefits accrued to them by the tourism industry.

iv) Tour operators

- This research recommends that tour operators and travel agents should consider partnering with hotels in creating and promoting accessible tours and urge hotels to reduce rates for domestic and international tourists; considering the hard economic times created by the pandemic to potential customers.
- Create enhanced and innovative packages in addition to the traditional beach and wildlife tourism. Include packages on culture, business, health, photography, sports, etc.
- Tour operators should seek to develop relevant and updated visitor centers at strategic locations to serve as activity hubs (with activity operators and guides), information centers and provide services to visitors (i.e. food and beverages, shopping such as crafts and basic provisions).
- It would also be important to develop and improve Apps that facilitate and provide comprehensive information across all modes of transportation nationwide. This will make trip bookings, journey planning and navigating around country easier for free, independent travelers through the use of smartphone apps and other technologies. The App will give suggestions and navigate tourists to attraction sites at ease.

v) The MICE sector

- The Meetings, Incentives, Conventions and Exhibitions (MICE) sector is a growing and critical segment of the tourism industry with a great potential. Unfortunately, the COVID-19 outbreak has brought the world to a standstill with unparalleled and unforeseen impact in our lives, our economies, our societies and our livelihoods. There are growing risks of a global recession and a massive loss of jobs in the tourism industry. United Nations World Tourism Organization (2020) estimates international tourist arrivals could decline by 20% to 30% in 2020 and this would translate into a loss of 300 to 450 US$ billion in international tourism receipts globally. Additionally, MICE industry has been strongly affected by the disruptive effects of COVID-19. Since the onset of the epidemic, hundreds of events have been cancelled all over the world and waking up to the news of cancellations or postponements has become the new normal. Kenya's MICE tourism industry goes back to nearly 3 decades and it will be growing slowly. But, there is a huge demand for incentive travels and corporate meetings as we have diversified attractions in country. As a result of these adverse conditions, most of the event organizers have cancelled, postponed and relocated their events. We have seen significant events being cancelled, since they cannot guarantee the safety of participants or if they anticipate logistics problems due to travel restrictions. Not only that, we have also seen several organizers postpone their events as the Olympics. Postponement is not a unilateral decision since hosting an event at a later time requires the approval from venue managers, suppliers, and sponsors.
- As a country, to overcome these issues, we can develop alternative formats that allow people to meet and interact remotely. Virtual and hybrid events emerge as two additional options to consider in the face of disruption. Therefore, number of meetings and conferences can be redesigned as virtual events and this format is probably the best alternative in crisis times. Incorporating technologies that allow for video conferencing and virtual meetings are increasingly seen by many organizers as a cost effective option when holding MICE events. Virtual events mainly serve as a good substitute for recession-prone exhibitors and attendees. Use of social media has become so commonly used in marketing for almost every type of products and services in the MICE industry and is one of many underlying factors that have shifted behavior and challenged traditional marketing campaigns.
- Additionally, organizing hybrid events is a solution of retaining the MICE industry in a situation as this. Hybrid events are feature a mix of live and virtual components. In this model, a number of people may be present at a physical location while the audience at large attends the event remotely. If we can adopt these two methods, we can get the number of benefits as increased the financial benefits, increased attendance, measurability and ease of transition.



5.4 CASE STUDIES IN MANAGING COVID-19 CRISIS IN THE TOURISM INDUSTRY IN KENYA

5.4.1 Case Study 1: Kenya Wildlife Services

The national parks have remained open to members of the public. To prevent the spread of COVID-19, the visitors have to pass through screening centers erected at the gates. The screening is a part of a raft of measures that have been put in place to ensure the safety of visitors and staff members and the park to stay operational during the COVID-19 pandemic.

5.4.1. A. Conservation

The COVID-19 global pandemic is causing unprecedented health and economic challenges globally. In Kenya, the wildlife sector is experiencing severe threat of unprecedented magnitude due to the collapse of the tourism industry. Kenya has a total of 27 National Parks, 34 Reserves, and 161 Community Conservancies, in total covering an area of about 16% of the Kenya landmass. The collapse of the tourism industry has left parks, reserves, and conservancies exposed, and stripped of the vital source of funds for their day-to-day management, operations, and ensuing wildlife security. This situation will inevitably lead to escalation in poaching for trophy and demand for bushmeat. Human-Wildlife Conflicts (HWC) are already on the raise with increasing movement of wildlife outside conservation areas; and, drastic reduction in the capacity to respond to HWC cases has resulted in deaths and serious injuries.

5.4.1. B. Impact of COVID-19 on KWS

According to KWS, COVID-19 caused a significant drop in internally generated revenue and visitor numbers by 98%. There was an escalation in bush meat poaching and associated crime in some parts of the country such as Nakuru, Machakos, Kajiado, Nairobi, Makueni and Taita Taveta. There was also a noted increase in human - wildlife conflicts in some parts of the country. Due to the challenges associated with COVID-19, KWS suspended key activities including wildlife censuses, Corporate Social Responsibility projects and education programmes. Therefore, KWS had to depend on government subvention in order to satisfy their role.



5.4.1. C Response Measures taken by KWS

Table 5.7 presents the measures taken by KWS to respond to COVID-19 pandemic.

Table 5.7: COVID-19 Response Measures Undertaken By Kenya Wildlife Service

Communication and Reporting
• Issued circular dated 16th March, 2020 advising all employees in the Service on the precautionary measures to ensure safety. • Issued a statement on 17th March, 2020 to the conservation stakeholders and partners re-assuring them of the preventive measures taken by the Service and further that the National Parks are safe for visitation. • Disseminated additional information on preventive measures from the Ministry of Health and World Health Organization (WHO) to all employees on 18th March, 2020. • Set-up a toll-free line number 0800 597 000 for purposes of reporting information on the disease.
Coordination
• Following declaration of COVID-19 as a pandemic, the Service constituted an internal Prevention & Coordination Committee on 16th March, 2020 whose objective is to coordinate, monitor and advise management on the appropriate preventive measures to address the pandemic. • The committee has been meeting regularly and advising management on the prevention measures and arising from its recommendations, management has implemented the following actions: - • Set-up local prevention & coordination committees in all the eight (8) field conservation areas to coordinate response initiatives.
Prevention of Spread
• Suspended learning at the Service's two (2) institutions namely; KWS Training Institute, Naivasha and the Law Enforcement Academy, Manyani. • Suspended all non-essential travel of employees to any destination outside of the Republic of Kenya, whether on official Government business or on private business until further notice. • Provided temperature monitors in all entrances to KWS Headquarters and National Parks & Stations for purposes of screening staff and other visitors to detect cases of high fever. • Instituted mandatory daily screening of staff and visitors. • Scaled down operations by 60-70% in 20 parks and reserves. • Merging some outposts and therefore reducing them from 144 to 123. • Proactive HWC patrols and strategic deployment of problem animal management unit (PAMU). • Working with partners especially conservancies that have community scouts and honorary wardens in some areas. • Enhanced community sensitization and awareness creation using local radio and television programmes.
Mobilization of Resources
• Facilitated KWS Headquarters and all the field conservation areas with funds for purchase of Sanitizers, Dispensers, Disinfectants, other consumables and hire of health care providers where necessary totaling to KSh. 7,012,145/=. • Set-up a Wellness Isolation Room at KWS Headquarters to cater for any cases arising from the pandemic. • Provided sanitizers in all entrances to KWS Headquarters and National Parks & Stations for use by employees and other visitors.
Monitoring and Evaluation
• Developing scenarios for wildlife conservation and a contingency plan for three months and nine months periods focusing mainly on wildlife security, human wildlife conflict and endangered species management.

Source: KWS (2020)

5.4.1. D. Recovery Pathways for KWS

1. Rebranding the parks in order to renew the product offer.
2. Aggressively carry out targeted communication and marketing for domestic and regional markets.
3. Exploring innovations to grow revenue.
4. Payment for ecosystems services and carbon credits.
5. Development of a new e-commerce Kenya park website.
6. Use of mobile applications.
7. Modernize operations through the use of technology.
8. Design targeted special educational and conservation programmes.
9. Use of technology in identification and monitoring of problem animals.
10. Fence construction and maintenance.
11. Career progression planning, multiskilling and reduction of wage bill.
12. Focus on strategic partnerships.
13. Strengthen research and development.

Conservancies need to:

i. There is need to create opportunities for sustainable models in wildlife conservation

ii. There is need to expand the conservancies' revenue outside tourism in such areas as carbon offsets, biodiversity offsets, livestock and agriculture etc.

5.4.2 Case Study 2: Hillpark Hotel, Upperhill, Nairobi

Introduction

Before 31st December 2019 when the World Health Organization (WHO) learned of the first case of COVID-19, life was moving on as usual in many parts and economies of the world. The first case of COVID-19 was reported in Wuhan City, China and due to person to person transmission, slowly began spreading to other parts of the world. The extent of the spread led to World Health Organization declaring it a pandemic on 30th January 2020. As at 6th May 2020, over 3.7 million of COVID-19 cases had been recorded around the world with Kenya recording over 500 cases with new reported cases raising by the day.

The pandemic has brought detrimental economic and social consequences and has affected the normal operations of most businesses in Kenya. The Government of Kenya issued measures to mitigate and contain the contagion such as travel restrictions, cessation of movement, lockdowns of counties marked as high risk. While important, these measures brought and continue to bring adverse effects on most sectors with tourism and hospitality the hardest hit.

Travelers have been left with no choice other than to cancel or postpone flights, accommodation and tour bookings. As a result, and given the circumstances, many hospitality and tourism stakeholders have surrendered cancellation charges. The cancellations as well as the containment measures have led to the closure of many hospitality establishments leading to loss of employment for thousands of people working in the sector.

However, despite the blow, a number of hotels have been at the fore front working with government and other private sector stakeholders in the fight against COVID 19. The hotels have among other things offered their premises to act as quarantine centers for those who may have been exposed to the virus. Hillpark Hotel, Nairobi, is one such hotel.

Hillpark as a quarantine center for COVID-19 suspects

The hotel has been a quarantine center designated by the government of Kenya to cater to the needs of COVID-19 suspects. Though risky, the general manager (GM), Mr. Joseph Ndunda noted that: ***"it was important to work in collaboration with the government to help mitigate the contagion."***

Employees' perception on serving COVID-19 suspects

Initially, the employees of the hotel were fearful and did not know how to go about handling the COVID-19 suspects. But through thorough training by personnel from the Ministry of Health, the employees have successfully served COVID-19 suspects without any reported cases of infection.

General benefits as a quarantine center

There are numerous benefits to the hotel for being a designated quarantine center for COVID-19 suspects. Taking care of COVID-19 suspects has increased awareness on how to follow the government guidelines on managing and mitigating the pandemic. Also, being a quarantine center has brought revenue to the hotel to cater to employees' remunerations and operational costs. Moreover, the COVID-19 suspects will be the hotel's future clients and thus future business opportunities. The pandemic has also raised the awareness of cleanliness in the hotel as manifested in the following statement:

> ***"One of the benefit of being a quarantine center is staff awareness to follow the protocols. Staff have learnt a lot to even teach others in the community on how to deal with COVID-19 suspects. Also, this has brought revenue to cater to employees' salaries and operation costs. A part from that, it has also raised the awareness of cleanliness in the hotel. Staff are now keener on the general cleanliness of the hotel" as reported by the GM.***

Impact of COVID-19 on Hillpark Hotel

When the year began, the hotel had huge plans and expected a high flow of guests particularly for the Easter Holidays. This was however, not to be. Till now, the hotel has had 60% cancellation of bookings and waiving all the cancellation fees. And this has resulted in many financial implications for the hotel. Low business forced the management of Hillpark send three quarters of the workforce home on leave. The management however, remains committed to supporting them financially and has not enforced any pay cuts. Those who may have exhausted their leave days are allowed to use their future days to be compensated when business resumes normalcy. Supporting the staff through ensuring their salaries are paid when there is little income is however, proving to be a big challenge. The management is nevertheless, committed to ensuring that no workers are laid off and have been having many consultative meetings with them as news of the pandemic unfold. The GM noted the following:

> ***"We had to reduce our normal room prices to over 50% discount. We charged uniform pricing regardless of different categories of rooms in the hotel—all COVID-19 suspects paid uniform charges regardless of the room checked in. Though giving a 50% discount was a huge decision, it helped us to manage employee salaries and operational costs of the hotel."***

What the Hotel is doing in the fight against COVID-19

To support in the fight against COVID-19, Hillpark hotel has been used as one of the government approved quarantine centers and has a further extended accommodation discounts of up-to 57% in an effort to support those on quarantine. This contributed to some revenue in the months of March and April as the hotel was on 80% occupancy. In order to protect the employees, the hotel reduced its workforce by 75% to 32. The remaining employees were accommodated within the hotel premises while the rest were sent home on paid leave. To ensure the safety of those in quarantine, the hotel procured protective gear, hand sanitizers, masks, thermometers, and invested in fumigation.

Further, as part of its corporate social responsibility, Hillpark recently organized and delivered packed lunch to the health workers at Mbagathi—a hospital set aside to cater to COVID-19 patients. The management encouraged other hotels to step up and encourage and motivate the workers through similar acts. The hotel is also planning to support enforcers of the government directives by providing food and drinks.

While all may seem doom and gloom, the management of the hotel believes that the pandemic provides an opportunity for hotels to rethink their strategies during the hard times of COVID-19. Hotels for example may look into delivering food to offices or homes. They also need to rethink their long-term strategies since it may take 6 months or more to recover given that the WHO needs to declare a country COVID-19 free for international tourism to resume normalcy.

Hillpark is currently putting in place measures to mitigate the effects post COVID-19. The management has already embarked on marketing strategies that are targeted to domestic tourists with attractive accommodation packages. It is anticipated that guests will be very sensitive to hygiene standards and therefore thorough training of the staff will be conducted. The government may support these efforts by reducing taxes, increasing the budget allocated to tourism as well as organizing international campaigns to rebrand Kenya. It is also now more than ever when tourism bodies need to be led by qualified tourism professionals who will ensure a quick rise of the industry post COVID-19 pandemic.

Key Takeaways from Hillpark General Manager

1. COVID-19 pandemic has taught the tourism and hospitality industry to stop being rigid to their SOPs and be ready to adjust where change is required.
2. The industry should also be innovative to remain relevant and be ready for any business disruption.
3. The hotels should develop and implement protocols for all employees on how to conduct themselves within and outside the environment.
4. Hotels have also learnt that government protocols and regulations can be changed anytime based on the prevailing circumstances.
5. Hygiene standards will be key moving forward in any hotel because customers will be very sensitive which is now forcing hotels and restaurants to invest in training staff and implementing HACCP to remain safe. Guest rooms will not only be cleaned as has been but will also be disinfected to keep them safe.
6. Hotels should invest in technology and make all payments digital. The use of digital payment platforms such as Mpesa and credit cards among others will assist in controlling the spread of viruses either now or in the future.
7. Hotels should also use digital guests' registration registers to minimize contacts with customers who may be carrying any infectious virus and bacteria. Cash payments should be discouraged.
8. Hotels should not only worry about employees' health but also that of customers. Health status of employees will be key to operating in safe environment and hotels will therefore need to invest in employees' medical insurance schemes or partner with particular hospitals which will be attending to employees' health matters.
9. Hotels will also be forced to come up with medical schemes for casual or seasonal employees because they are part of the workforce and if not taken care of can be a risk to other employees and customers.
10. Hotels have now invested on sanitizers and infrared thermometers at the entrances. This calls for security personnel training on customer care and proper communication to be able to handle guests well at the hotel entrances when they are taking temperature readings.
11. Hotels have also learnt that sick employees should be handled with care and not to force employees when there is proof that they are sick to eliminate any kind of disease spread.
12. Hotel management should be trained on risk management to eliminate panic in case of a pandemic like COVID-19. After the pandemic many hotels rushed to close down instead of coming up with strategies to manage it. This has rendered many employees jobless even with some of the hotels having been making profits in millions. Management of hotels should take employees as a key component in creating a competitive advantage in the face of stiff competition.





6 RECOVERY STRATEGIES IN BRIEF

6.1 INTRODUCTION

This chapter presents the immediate, medium-term, and long-term recovery strategies for tourism in Kenya. The stakeholders responsible for execution are indicated for each recovery strategy.

6.2 IMMEDIATE RECOVERY STRATEGIES

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

Strategy	Activities and Output	Responsibility - Lead
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
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

Strategy	Activities and Output	Responsibility - Lead
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

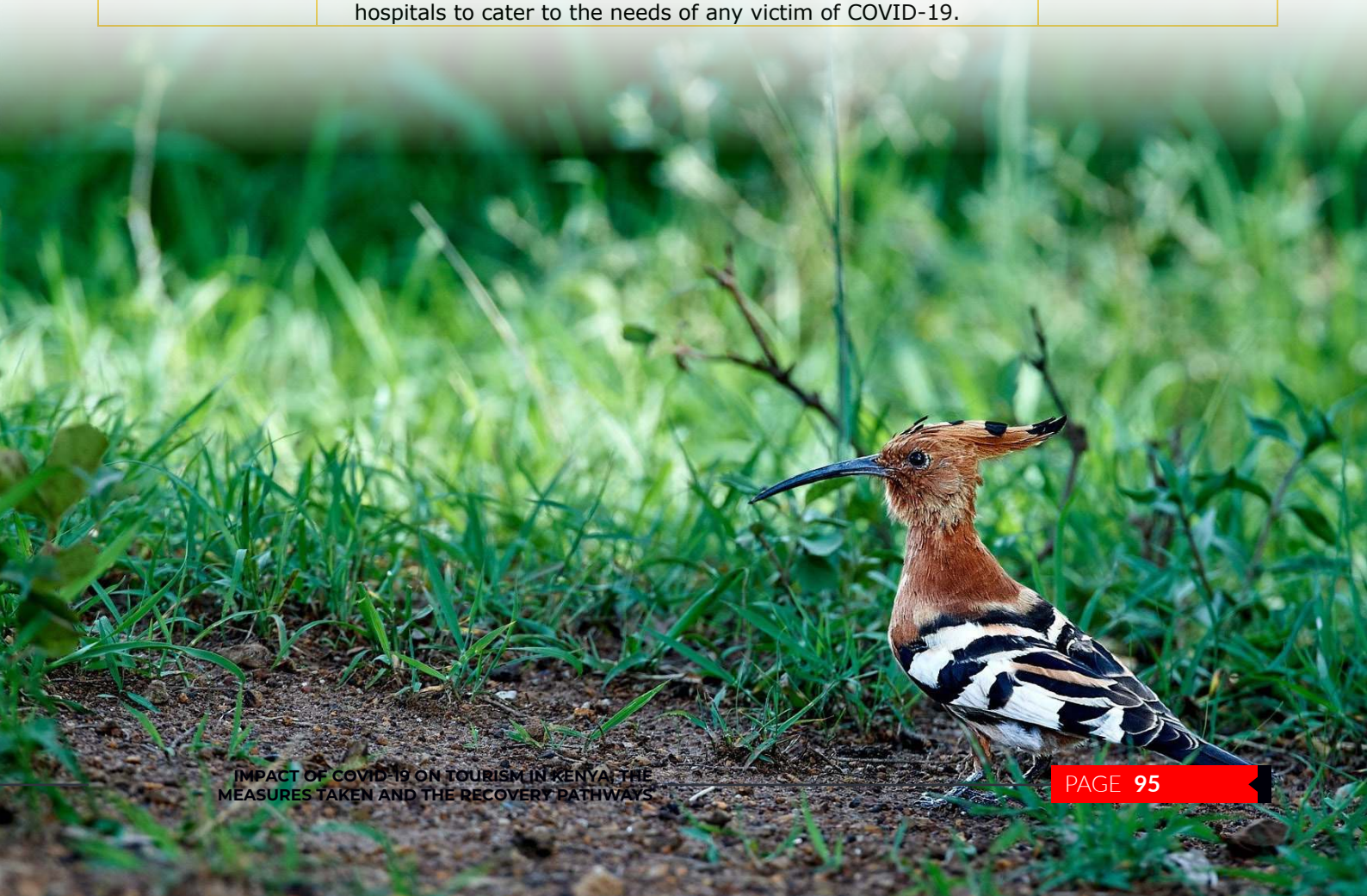


6.3 MEDIUM-TERM STRATEGIES

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

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

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



6.4 LONG-TERM STRATEGIES

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

6.5 MONITORING AND EVALUATION OF THE IMPLEMENTATION OF COVID–19 PROTOCOLS IN TRAVEL AND TOURISM IN KENYA

6.5.1 Purpose of the Protocols

To provide the industry with the insights and toolkits which while implemented ensure that the destination is safe, secure, seamless and provides an authentic and meaningful experience.

6.5.2 Monitoring and Evaluation of the Implementation of COVID-19 Protocols

This could be done through the use of tracing and warning apps, geospatial digital solutions and evaluation of periodic reports.

- Use of tracing and warning Apps: The Apps should be voluntary, transparent, temporary, cybersecure, using data, relying on Bluetooth technology to provide alerts incase of infections close by. Health authorities should be the only ones to have access to such data and take measures to interrupt transmission chains. These apps should:
- Provide accurate information on the pandemic
- Provide a questionnaires for self-assessment
- Contact tracing and warning functionality
- Communication capability
- The Apps could have self-diagnoses and symptom checker applications.
- The industry to embrace innovative geospatial digital solutions to self regulate in different sectors and consolidate all information centrally. Apps could be used to fill periodical questionnaires by travel and tourism operators and for monitoring and evaluation by the government.
- The industry to monitor and evaluate periodic reports throughout the crisis and recommend action or the phasing out of measures that seem no longer necessary.

6.5.3 Protocols for Key Industry Sectors

Box 6.1: Protocols for Key Industry Sectors

Private Sector Cross-cutting Measures

- Obtain reopening license
- Develop a COVID-19 infection prevention plan
- Establish a preparedness plan
- Prepare a response plan
- Develop a staff code of conduct
- Set up coordination committee
- Train the personnel
- Share guest guidelines ahead of trip
- Communicate protocols to staff and guests
- Integrated technologies to enable automation to ensure digital touchless operations
- Use signposting - Safety signs or markings (space, hygiene etc)
- Provide elevator etiquette
- Install visual social distancing markers
- Ensure physical distancing, avoid queuing or mark floors
- Online or self check-in and check-out
- Use thermal scanning process

- Limit the number of guests
- Personal protection equipment (PPE) available to staff eg use of face masks
- Guidance for cleaning crew to all areas of the venue including washrooms, elevators, escalators, conference areas, lobbies, and common areas
- Use selected approved disinfecting products
- Evaluated innovations for cleanliness and disinfection
- Availability of alcohol-based hand rub sanitizer
- Avoid activities in closed spaces
- Sufficient ventilation
- Stay-home policy for anyone displaying any symptoms
- Harmonized health, safety and hygiene protocols.
- Entry-exit screening that is non-intrusive
- Closely monitor the number of guests within the establishment
- Regular monitoring of compliance
- Increased frequency of waste disposal
- Inform guests about support available if questions or concerns arise
- Aligned new protocols with all third-party partners and suppliers
- Digitizing guest services such as digital maps, digital queue management, e-menus, virtual personal shopping, roving concierge and promote contactless payment
- Implement new technologies such as augmented reality or virtual reality to improve visitors' experience before, during and after a visit
- Doors should be opened automatically or remotely
- Statistical information and continuous research

Hospitality Industry

Operational Protocols

- Evaluated innovations
- Right staffing levels
- Health checks for staff and guests
- Physical distance maintenance
- Guest information & guidelines
- Staff training on:
- Infection control
- Social distancing
- Enhanced hygiene measures
- Handwashing, the use of masks and gloves
- Hygiene operations on:
- Increased frequency of cleaning
- Innovations eg electrostatic sprays, ultraviolet light
- Contactless check-in
- Personalized service
- Health check measures
- Spare isolation rooms
- Physical distancing

Safe Experience

- Guest health/temperature checks
- Limited social interaction
- Food safety and hygiene
- Avoiding guest handling of food at buffets
- Offering room service
- Disinfecting, table spacing and social distancing
- Clear, consistent, and enhanced communication

Tour Operators and Travel Agents

- Provided staff with the tools and information necessary regarding infection control, physical contact, sharing of food and utensils, appropriate attire, and enhanced hygiene measures, the use of masks and gloves
- Create personalized and small group tours and packages.
- Incentivize domestic tourism, short trips and visits to nearby destinations in the short term.
- Share guest guidelines ahead of trip
- Guest health checks and testing
- Explore collaboration with medical/ travel insurance companies
- Allow for voucher redeeming for packages and products
- Promote digital communication
- Promote rent-a-car services
- Allocated seating plans with no rotation
- Provide bins with liner bags and regular disposal
- Sanitation, disinfection and deep cleaning practices across transportation
- Guest health checks and testing
- Support use of contact tracing apps
- Allow for voucher redeeming for packages and products
- Established with partners and suppliers, including shops, showrooms, museums, shows, theatre, parks, reserves, concert halls, factories & farms, that they follow likeminded health, sanitation, disinfection and hygiene protocols

Aviation

- Develop a COVID-19 infection control action plan/checklist
- Flexibility in slot allocation practices to match demand
- Ensure certifications and airworthiness
- Confirm partner airports, transport and catering companies are compliant
- Health checks for airline staff
- Occupancy limits in boarding areas and congregation on planes
- Technological innovations
- Reduce passengers' touchpoints
- Increase the frequency of aircraft and cabin cleaning
- Guidelines for food safety on-board
- Pre-arrival risk assessment questionnaire / self-declaration electronic portals

- Non-intrusive entry-exit screening
- Robust COVID-19 testing within a short timeframe
- Assist government with contact tracing
- Provide signage, floor markings and announcements to encourage physical distancing
- Encourage online check in and self-bag drop options
- Speedy baggage claim process
- Ensure health and safety of passengers on-board the plane
- Provide masks for passengers and crew and ensure their use during the whole flight
- Limit movement in the cabin
- Rearrange seats to reduce contact
- Avoid having guests handle food
- Clear, consistent, and enhanced communication both digitally and physically at airports and in the plane
- Limit hand luggage
- Traveler insurance covering COVID-19

Airports

- Mitigate risks at departure and/or arrival
- Schedules in place for when operations resume
- Ensure required staffing levels
- Implementation of biometrics and reduce passengers' touchpoints the use of selfcheck in kiosks and bag drop, home-printed bag tags, off-airport processing, greater use of biometric e-gates and boarding card reading gates
- Implement guidelines for food safety in restaurants, cafes and kiosks relating to supply chain control, food handling and preparation, hygiene, sanitation, disinfection, digitization and queue management in line with local legislation
- Monitored the number of passengers in a given space (gates, shops, lounges, etc)
- Evaluated innovations for cleanliness, disinfection and a touchless experience, such as e-shopping, with validation
- Protective screens for staff and use of personal protection equipment (PPE)
- Code of Conduct or list of expected behaviour for staff and operations
- Revisited guidance for cleaning team to all areas of the airport including self-service equipment, baggage trolleys, counters, buggies, security checkpoints, washrooms, elevators, hand-rails, boarding areas, and common areas with a specific focus on high-frequency touch points.
- Feed into contact tracing apps.

MICE

- Confirm that key stakeholders are compliant
- Ensure physical distance in layout and limit the number of staff
- Support working from home to reduce density in the workplace
- Design and share visual of floor plans and layout to showcase preparedness

- Share participant guidelines ahead of event
- Health checks for staff
- Use of technologies to enable automation such as contactless registration and contactless payments
- Use digital invitations
- Sufficient ventilation such as air-conditioning and air exchange
- Provided staff with the tools and information necessary
- Selected disinfecting products by venue
- Consider hybrid events in the future using virtual platforms for some

Outdoors Activities

- Use recalibrated offices and working spaces to promote social distancing
- Ventilate offices through open windows
- Observe Government mandatory

trading hours, delivery hours, packaging disposal, merchandise to shop floor procedures and product care, social distancing requirements, fitting room occupancy, deep cleaning and sanitization and, the transition to digital receipts.

Attractions and Conservation Centers

- Protect employees with various approaches, including barriers, protective coverings, and distancing
- Reduce touch areas
- Monitor entrance
- Manage density of people within the facilities
- Communicate protocols and responsibilities to the guests
- Place signs or markings appropriately
- Use of innovative technology

Government

- Develop a COVID-19 infection control action plan/checklist
- Flexibility in slot allocation practices to match demand
- Ensure certifications and airworthiness
- Confirm partner airports, transport and catering companies are compliant
- Health checks for airline staff
- Occupancy limits in boarding areas and congregation on planes
- Technological innovations
- Reduce passengers' touchpoints
- Increase the frequency of aircraft and cabin cleaning
- Guidelines for food safety on-board
- Pre-arrival risk assessment questionnaire / self-declaration electronic portals
- Non-intrusive entry-exit screening
- Robust COVID-19 testing within a short timeframe

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Appendix 1: Members of the Research Team

Members of the Research Team who carried out the study on the Impact of COVID-19 on the Tourism Sector, the measures taken and the recovery pathways

S/No.	Name	Role	Email	Phone
1.	Dr Esther Munyiri	Consolidation of ideas and input	Munyiri.esther@ku.ac.ke	0721 257133
2.	Dr Albert Kariuki	Consolidation of ideas and input	Kariuki.albert@ku.ac.ke	0722 470963
3.	Dr Edgar Ndubi	Consolidation of ideas and input	Ndubi.edgar@ku.ac.ke	0722 343370
4.	Dr Florence Njau	Proposal development – Lead	njauflorence@hotmail.com	0710 790730
5.	Dr Bitok Kipkosgei	Proposal development	Bitok.kipkosgei@ku.ac.ke	0725 820202
6.	John Nyaga	Proposal development	Jnyaga2003@yahoo.co.uk	0721 545985
7.	Diana Chebotibin	Proposal development	dianatibinss@gmail.com	0727 133226
8.	Dr Vincent Maranga	Proposal development	maranga.vincent@ku.ac.ke	0791 487540
9.	Juliet Mesa	Development and dissemination of questionnaire - Lead	mesajullie@gmail.com	0726 699352
10.	Joseph Ndunda	Development and dissemination of questionnaire	Joseph.ndunda@hillparkhotel.com	0722 127277
11.	Moses Rotich	Development and dissemination of questionnaire	Mrotich2002@gmail.com	0722560754
12.	Angeline Kinyajui	Development and dissemination of questionnaire	angelinekinyanjui@gmail.com	0720 793622
13.	Nyabisi Mengo	Content Analysis – Lead	bisi.mengo@gmail.com	0727 586399
14.	Gladys Kavuvi	Content Analysis	blessedwriters@gmail.com	0725 067267
15.	Christine Mbui	Content Analysis	cmbui@nita.go.ke	0728 777939
16.	Rhoda Kanana	Content Analysis	Krhoda99@gmail.com	0728 297112
17.	Milcah Ngosi	Content Analysis	milcahngosi@gmail.com	0726 294167
18.	Liza Kithinji	Content Analysis	lizakithinji@gmail.com	0729 110636
19.	Margret Njoroge	Content Analysis	nimmohkibe@gmail.com	0725 081439
20.	Paul Ikachoi	Interviews Dvt	Ikachoi88@gmail.com	+255 658 534 803 0728 361586
21.	Charity Chepkemei	Interviews Dvt	Chepkemeicharity@gmail.com	0702 368284
22.	Dorice Morong	Interviews Dvt	Doricemorong50@gmail.com	0731 961196
23.	Dr Alex Kivuva	Interviews Dvt	kivuva.alex@ku.ac.ke	0721 627775
24.	Maria Agwata	Interviews Dvt	marianyangate@gmail.com	0714 317066
25.	John Gitau	Interviewing, Data Analysis and Discussions, and Editing and formatting of final documents– Lead	gitau.john@ku.ac.ke	0715 567175
26.	Duncan Shirandula	Interviewing, Data Analysis and Discussions, and Editing and formatting of final documents	shirandula.duncan@ku.ac.ke	0729 141972
27.	Prof Pius Odunga	Economic/social/environmental impact assessment	podunga5@gmail.com	0722 433567
28.	Francis Mwaura	Economic/social/environmental impact assessment	mungaimwaura@yahoo.com	0722 402364

Appendix 2: Tourism Activities and Services Ninth Schedule (s.98 (1) of The Tourism Act, 2011 TOURISM ACTIVITIES AND SERVICES

Class "A" Enterprises	Class "B" Enterprises	Class "C" Enterprises	Class "D" Enterprises	Class "E" Enterprises	Class "F" Enterprises	Class "G" Enterprises	Class "H" Enterprises
Hotels	Restaurants	Tour or safari operators	Game fishing outfitters	Local traditional boat operators	Entertainment facilities	Conference and event services	Tourism and hospitality training institutions
Members clubs	Other food and beverage services.	Tourist service vehicle hire	Enterprises offering camps and camping equipment for hire	Professional safari photographers			
Motels		Local air charter	Nature parks	Curio vendors			
Inns		Travel agency	Nature reserves	Private zoos			
Hostels		Water sports	Nature trails	Citizen tour leaders or guides; and			
Health and spa resorts		Balloon operators and	Game ranches	General vendors			
Retreat lodges		Boat excursions	Amusement parks; and	Beach operators			
Eco lodges			Non-citizen tour leaders or guides.				
Tree houses							
Floatels							
Service flats							
Service apartments							
Beach cottages							
Holiday cottages							
Game lodges							
Tented camps							
Safari or mobile camps							
Bandas							
Cultural homes and centers							
Villas							
Homestays							

Guest houses and Time shares.							
Hotels							
Members clubs							
Motels							
Inns							
Hostels							
Health and spa resorts							
Retreat lodges							
Eco lodges							
Tree houses							

Appendix 3: Government Institutions

Ministry of Education

- Technical and Vocational Education and Training Authority (*TVETA)*
- Universities
- Kenya Utalii College
- Kenya Wildlife service College

Ministry of Tourism and Wildlife

- The Kenyatta International Convention Centre
- The Tourism Regulatory Authority
- The Kenya Utalii College
- The Tourism Protection Service
- The Kenya Tourism Board
- The Tourism Fund
- The Tourism Finance Corporation
- Tourism Research institute

Appendix 4: Questionnaire on the Impact of COVID-19 on the Tourism Sector in Kenya

Thank you for participating in this study. Your sentiments will be treated with utmost confidentiality and responses anonymously attributed. The survey is part of the great Ministry of Tourism and Wildlife recovery efforts to enable the tourism industry develop sustainably. (Please type Y where applicable)

1. Which of the following category (or categories) does your tourism business fall into?
   - Accommodation provider (Hotel, B&B, Guest house, Hostels)[ ]
   - Attraction (Museums, Cultural center, National Park/Reserve)[ ]
   - Destination Management Organization [ ]
   - Conference/ Exhibition Centre [ ]
   - Airline [ ]
   - Travel Agent [ ]
   - Tour Operator [ ]
   - Event Organizer [ ]

2. Please indicate the markets you operate in (Please select all that apply).
   - Domestic [ ]
   - Inbound [ ]
   - Outbound [ ]

3. How many staff (permanent and temporary) does your business/organisation employ?
   - Up to 10 [ ]
   - 10-50 [ ]
   - 51-100 [ ]
   - 101-250 [ ]
   - More than 250 [ ]

4. Have you had to reduce staff numbers?
   - Yes [ ]
   - No [ ]
   - Not applicable [ ]

5. a) As part of measures to mitigate loss of revenue due to COVID-19, has your business enforced a pay cut on its employees?

   a). Yes [ ] No [ ]

   b). If yes what is the percentage of pay cut?
   - 10% [ ]
   - 20-30% [ ]

- 30-50% [ ]
- 50-70% [ ]
- Over 70% [ ]

6. What percentage of employees from your business has been sent on unpaid leave due to COVID-19?
   - 10% [ ]
   - 20-30% [ ]
   - 30-50% [ ]
   - 50-70% [ ]
   - Over 70% [ ]

7. How many employees from your business have lost their jobs as a result of the COVID -19 outbreak? Kindly indicate the numbers in the brackets below.
   - Full time employees [ ]
   - Part time employees [ ]
   - Seasonal staff [ ]

8. How likely is it that you will reduce staff numbers further in coming months?
   - Very likely [ ]
   - Fairly likely [ ]
   - Not very likely [ ]
   - Don't know [ ]

9. Have there been any cancellations to existing bookings as a consequence of COVID-19?
   Yes [ ] No [ ]

10. What percentage of booking would you say you have lost since the beginning of the COVID-19 outbreak?
    - Up to 10% [ ]
    - 10 -30% [ ]
    - 31-50% [ ]
    - 50-90% [ ]
    - Over 90% [ ]

11. If any cancellations were made, how did your business deal with them?
    - Waived any cancellation fees [ ]
    - Stuck to the standard cancellation policy [ ]
    - Encouraged re-booking the trip [ ]
    - Other (please specify_____

12. Which markets are you experiencing changes to bookings from? (Either individual travellers or groups)

- Domestic visitors [ ]
- Inbound visitors (International) [ ]

13. Of the inbound visitors, what proportions were from Kenya's short-haul destinations and what proportion were from long-haul destinations?
- All from the short-haul destinations [ ]
- Equal split from long-haul and short-haul destinations [ ]
- All from the long-haul destinations [ ]

14. Of the long-haul visitors, what proportions were from Kenya's top five long-haul markets? Please give an estimate (or exact) percentage of your total customers from each overseas market, with the total of all the responses to this question adding up to 100%.
- United States of America [ ]
- United Kingdom [ ]
- India [ ]
- China [ ]
- Germany [ ]
- Other long-haul

_____

15. Of the short-haul visitors, what proportions were from Kenya's top five short-haul markets? Please give an estimate (or exact) percentage of your total customers from each overseas market, with the total of all the responses to this question adding up to 100%.
- South Africa [ ]
- Uganda [ ]
- Tanzania [ ]
- Ethiopia [ ]
- Nigeria [ ]
- Other short-haul

_____

16. Have these changes resulted in reduced revenue?
Yes [ ] No [ ]

17. How much revenue have you lost in % terms due to changes in bookings since the beginning of the COVID-19 outbreak in terms of (K)?
- Up to 10% [ ]
- 10 -30% [ ]
- 31-50% [ ]
- 50-90% [ ]
- Over 90% [ ]
- Prefer not to say [ ]

18. If you have had any loss of business, what level of this will be covered by your current insurance?
    - All: 100% of business losses are covered by insurer [ ]
    - Most: 50-99% of business losses are covered by insurer [ ]
    - Some: 1-49% business losses are covered by insurer [ ]
    - None: 0% of business losses are covered by insurer [ ]
    - Uninsured [ ]
    - Please give any further details below

    _____

19. a). Do you anticipate future disruptions to earnings if the COVID-19 crisis continues beyond June 2020?

    Yes [ ] No [ ]

    b.) If yes in the above question how?

    _____

    _____

    _____

20. Overall, what do you anticipate will be the immediate to short-term impact of COVID-19 on your business? (0 to three months). Rate the severity on a scale of 1-5.
    - 5 catastrophic [ ]
    - 4 critical [ ]
    - 3 significant [ ]
    - 2 marginal [ ]
    - 1 negligible [ ]

21. Overall, what do you anticipate will be the long-term impact of COVID-19 on your business? (Four months +). Rate the severity on a scale of 1-5.
    - 5 catastrophic [ ]
    - 4 critical [ ]
    - 3 significant [ ]
    - 2 marginal [ ]
    - 1 negligible [ ]

22. What is your anticipated recovery period after the COVID-19 crisis is over?

_____

_____

_____

23. What measures has your business/organization put in place to mitigate the economic impact of COVID-19 on tourism?

_____

_____

24. As part of your Corporate Social Responsibility, how has your business/organization supported measures to combat COVID-19?

_____

_____

25. Which intermediate to short-term policies and response strategies has your business/organization put in place to ensure recovery of Kenya's tourism sector from the COVID-19 crisis?

_____

_____

26. What are the long-term response strategies and actions has your business/organization put towards full recovery of Kenya's tourism sector after the COVID-19 crisis?

_____

_____

27. Describe any other way that COVID-19 pandemic has affected your business/organization.

_____

_____

28. What are your expectations now and in the future from the Government to enable your business/organization recover from the effects of COVID-19?

_____

_____

Appendix 5:- Interview Schedule Tourism Industry CEOs' on COVID-19

This interview is aimed at soliciting information on how the Corona Virus pandemic has impacted on the tourism industry in Kenya, the measures taken and the recovery pathways.

What are the COVID-19 effects on Bed Occupancy?

- What is the effect of COVID-19 on bed occupancy?
- Projections in the high season.

What are the COVID-19 effect on International Visitor Arrivals and Departures?

- How has the international tourism market been affected?
- Any plans to revamp this market segment?

What are the COVID-19 effect on Domestic Tourism?

- How has the domestic tourism market been affected?
- Any plans to revamp this market segment?

What are the COVID-19 effects on Visitors?

- How many visitors are affected?
- How many visitors are stranded in various tourism facilities?
- What kind of support do these visitors need?

What are the Statements on COVID-19 effect on Employees?

- How are employees affected in terms job security?
- How well prepared are employees in handling d suspectCOVID-19 visitors and counterparts?
- Any structured training on health matters for workers in the tourism industry?

What are the COVID-19 effects on Business?

- What are the effects on tourism businesses?
- What is the state of current and projected reservations?
- What is the state of current cancellations?
- What is the level of trips postponed?
- Are there business closures due to the pandemic?
- Are there projections of new facilities/services/companies in the near future?
- Any plans to develop new products and services?
- Any plans for new market segments?

What are the COVID-19 effects on Business Recovery Measures?

- How can business enhance market recovery?
- How can tourism business support COVID-19 mitigation efforts?

What are the COVID-19 effects on Business Recovery Measures by Government?

- How should Government implement tourism markets recovery?
- How can Government support tourism business recovery?

- How can Government Partner with Airlines especially Charter Flights to revamp air travel?
- How can cruise tourism be revamped after the pandemic?
- How can Government enhance tourism product and service development after the pandemic?
- How can Government mitigate against possible tourism business bankruptcies?

What are the COVID-19 effects on Security?

- Security in general.
- Tourism specific security issues.

Thank you for participating in this interview. Your sentiments will be treated with utmost confidentiality and quotes anonymously attributed. The survey is part of the great Ministry of Tourism and Wildlife recovery efforts to enable the tourism industry develop sustainably.

Appendix 6: Visitors to Kenya Wildlife Service (KWS) Parks and Reserves 2017-February, 2020

Visitors to KWS Parks and Reserves for 2017													
	JAN	FEB	MAR	APR	MAY	JUN	JULY	AUG	SEP	OCT	NOV	DEC	TOTAL
CITIZEN	66,566	66,856	96,369	127,424	73,880	188,223	274,566	157,790	86,858	87,188	51,146	154,571	1,431,437
RESIDENTS	6,594	6,355	4,582	9,949	4,943	6,456	6,859	7,948	7,059	5,954	4,127	11,846	82,672
NON-RESIDENTS	35,041	35,234	28,504	24,475	17,010	28,646	54,596	62,812	42,102	41,532	29,907	37,828	437,687
TOTAL	108,201	108,445	129,455	161,848	95,833	223,325	336,021	228,550	136,019	134,674	85,180	204,245	1,951,796
Visitors to KWS Parks and Reserves for 2018													
	JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEP	OCT	NOV	DEC	TOTAL
CITIZEN	61,636	78,201	98,130	101,585	62,701	175,854	329,596	258,086	105,898	108,668	83,566	182,544	1,646,465
RESIDENTS	6,714	6,797	6,459	6,968	4,893	6,678	6,655	8,728	5,571	6,088	4,441	10,036	80,028
NON-RESIDENTS	44,699	49,129	40,264	24,108	27,898	35,418	72,664	91,499	54,734	52,816	43,392	49,188	585,809
TOTAL	113,049	134,127	144,853	132,661	95,492	217,950	408,915	358,313	166,203	167,572	131,399	241,768	2,312,302
Visitors to KWS Parks and Reserves for 2019													
	JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEP	OCT	NOV	DEC	TOTAL
CITIZEN	72,037	83,503	120,224	119,169	76,217	166,547	327,147	243,900	85,534	86,022	79,651	138,865	1,598,816
RESIDENTS	6,367	6,342	5,769	8,808	4,362	5,932	6,313	8,732	4,842	5,945	4,465	8,370	76,247
NON-RESIDENTS	53,985	57,654	41,000	26,750	19,213	38,302	67,461	94,474	56,508	54,178	43,657	47,869	601,051
TOTAL	132,389	147,499	166,993	154,727	99,792	210,781	400,921	347,106	146,884	146,145	127,773	195,104	2,276,114
Visitors to KWS Parks and Reserves for 2020													
	JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEP	OCT	NOV	DEC	TOTAL
CITIZEN	73,584	81,989											155,573
RESIDENTS	6,662	5,900											12,562
NON-RESIDENTS	56,591	62,226											118,817
TOTAL	136,837	150,115	-	-	-	-	-	-	-	-	-	-	286,952

Appendix 7: Kenya Tourism Board Detailed Recovery Plan

Kenya Tourism Board Detailed Recovery Plan 2018/2019 – 2019/2020 and Beyond

Activities implemented in 2018/19	KTB Plans -Immediate	KTB Plans – Post COVID-19 Plans
The year 2018/19 recorded the highest growth in the projections above. Some of the activities implemented in the year that contributed to the results included: Consumer Campaigns Online Consumer campaign by Seven Brands Global Promotional Consumer Channel Campaign - "Can You Kenya by Expedia Premier Destination Global Channel Campaign by TripAdvisor Digital Campaigns Digital Reassurance Campaign with Trip Advisor Joint digital marketing campaign with tour operators Events and Exhibitions International Luxury Travel Mart (ILTM), CHINA China Trade Forums Tour &Travel Exchange (TTE) and Sales call in the United States ITB ASIA- China International Import Expo Magical Kenya East Coast Roadshow United States Tour Operators Association (USTOA) Annual conference Outbound Travel Mart (OTM) Mumbai, International Tourism Bourse (ITB) Berlin Fitur exhibition, Madrid Spain Kenya Roadshow in UK & Ireland Joint Initiatives with Trade China Trade Training Themed on Luxury & Adventure KTB Event with Trade and Media in Los Angeles	Maintain continuous online destination visibility aligned to *Stay Home, Travel Tomorrow* messaging. (UNWTO Campaign message to support WHO messaging noting that tourism and travel has actively promoted spread of the virus). Continuous tourism landscape assessment, collating stakeholder feedback, stakeholder engagements to give input to Tourism Recovery Strategy PR strategy during the Crisis period in media platforms and digital platforms Identify themes that will remind people what is Magical about Kenya and inspire them to schedule their post Corona travel Rally industry to share content, stories, images, videos, testimonial alongside these themes Trade Webinars for the different markets Roll out e-learning Program in July 2020 Patriotic message to Kenyans here and abroad that we are standing with them as our no. one market and also because they are the ones that create & deliver the magic (Target: Kenyans in general, the trade, non-tourism partners) Develop a Tourism recovery strategy for the following: Domestic market Regional markets Overseas Markets This will kick off in about 4 months. Details in the next column	Aggressive demand creation in the domestic and international source markets Roll out of the Tourism Recovery plans across markets – The Big Idea Megafams for trade & Media TOPs – Co-op Marketing Influencer marketing for niche products/ experiences e.g. the tea/Flowers/Coffee/Athlete's ambassador program/ campaign Synchronized Kenya themed Events in key source markets

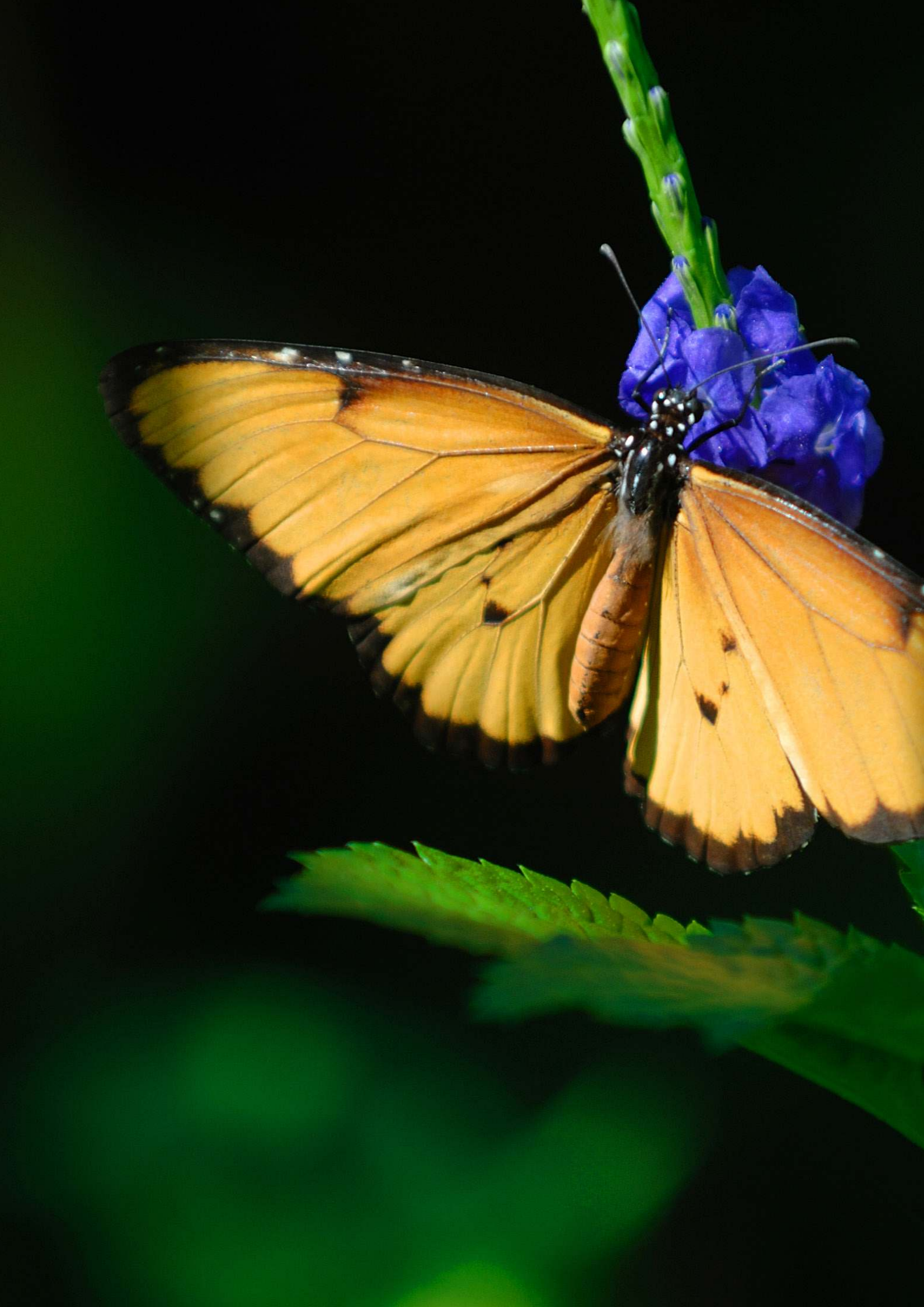
International Conservation Caucus Foundation (ICCF) Gala Event in Washington D.C World Bank Group Tourism for Development Event in Washington D.C on Association for the promotion of tourism to Africa (APTA) annual national convection United States Tour Operators Association (USTOA) Annual conference Lamu Cultural Festival Themed FAM Trips KATS Adventure Themed Fam trip Domestic Online Training Winners Fam Trip Press Fam trip on Lake Region Press Fam Trip on hidden treasures of Turkana Pre Obama-visit media FAM Sporting activities Magical Kenya Open Golf Tournament The Virgin Money London Marathon N/B: Similar activities had been implemented in the previous however the introduction of digital marketing in 2018/19 contributed to greater reach and increased visibility.		
	Stakeholder mapping based on market re-prioritization (To determine whom to work with).	Implement a sustained Marketing Incentive campaign with partners that would deliver the most impact in the source markets.



Appendix 8: Impact of Covid-19 on Tourism in Kenya, the Measures Taken and the Recovery Pathways Six-Week Research Work plan

S/No.	Task	Responsible	Deadline	Wk1 23-29 March	Wk2 30 March-5th April	Wk3 6-12th April	Wk4 13-19th April	Wk5 20-26th April	Wk6 27-30 April
1.	Proposal development - Lead	Dr Florence Njau	27.3.2020						
2.	Proposal development	Dr Bitok Kipkosgei	27.3.2020						
3.	Proposal development	John Nyaga	27.3.2020						
4.	Proposal development	Diana Chebotibin	27.3.2020						
5.	Proposal development	Dr Vincent Maranga	27.3.2020						
6.	Development and dissemination of questionnaire - Lead	Juliet Mesa	27.3.2020						
7.	Development and dissemination of questionnaire	Joseph Ndunda	27.3.2020						
8.	Development and dissemination of questionnaire	Moses Rotich	27.3.2020						
9.	Development and dissemination of questionnaire	Angeline Kinyajui	27.3.2020						
10.	Interviews Development	Paul Ikachoi	27.3.2020						
11.	Interview Schedule Development	Charity Chepkemei	27.3.2020						
12.	Interview Schedule Development	Dorice Morong	27.3.2020						
13.	Interview Schedule Development	Dr Alex Kivuva	27.3.2020						
14.	Interview Schedule Development	Maria Agwata	27.3.2020						
15.	Content Analysis - Lead	Nyabisi Mengo	6.4.2020						
16.	Content Analysis	Gladys Kavuvi	6.4.2020						
17.	Content Analysis	Christine Mbui	6.4.2020						
18.	Content Analysis	Rhoda Kanana	6.4.2020						
19.	Content Analysis	Milcah Ngosi	6.4.2020						
20.	Content Analysis	Liza Kithinji	6.4.2020						
21.	Content Analysis	Margret Njoroge	6.4.2020						
22.	Interviewing - Lead	John Gitau	11.4.2020						
23.	Interviewing	Duncan Shirandula	11.4.2020						
24.	Interviewing	Joseph Ndunda	11.4.2020						
25.	Interviewing	Charity Chepkemei	11.4.2020						
26.	Interviews transcription - Lead	Gladys Kavuvi	15.4.2020						
27.	Interviews transcription	Christine Mbui	15.4.2020						
28.	Interviews transcription	Rhoda Kanana	15.4.2020						
29.	Interviews transcription	Liza Kithinji	15.4.2020						
30.	Interviews transcription	Margret Njoroge	15.4.2020						
31.	Data analysis and discussions - Lead	John Gitau	17.4.2020						
32.	Data analysis and discussions	Duncan Shirandula	17.4.2020						
33.	Data analysis and discussions	Joseph Ndunda	17.4.2020						

34.	Data analysis and discussions	Charity Chepkemei	17.4.2020						
35.	Economic/social/environmental impact assessment	Prof Pius Odunga	17.4.2020						
36.	Economic/social/environmental impact assessment	Francis Mwaura	17.4.2020						
37.	Consolidation of ideas and input	Dr Esther Munyiri	18.4.2010						
38.	Consolidation of ideas and input	Dr Edgar Ndubi	18.4.2010						
39.	Final report editing - Lead	Dr. Edgar Otsembo	19.4.2020						
40.	Final report editing	John K. Gitau	19.4.2020						
41.	Final report editing	Duncan Shirandula	19.4.2020						
42.	Formatting of Final Report-Lead	John Gitau	20.4.2020						
43.	Formatting of Final Report	Duncan Shirandula							
44.	Preparation of Abridged version for Policy Makers	Dr Albert Kariuki	20.4.2020						
45.	Domestic tourism recovery strategy policy paper - Lead	Juliet Mesa	21.4.2020						
46.	Domestic tourism recovery strategy policy paper	Paul Ikachoi	21.4.2020						
47.	Domestic tourism recovery strategy policy paper	Dorice Morong	21.4.2020						
48.	Domestic tourism recovery strategy policy paper	Maria Agwata	21.4.2020						
49.	Product Diversification - recovery strategy policy paper - Lead	John Nyaga	21.4.2020						
50.	Product Diversification - recovery strategy policy paper	Diana Chebotibin	21.4.2020						
51.	Product Diversification - recovery strategy policy paper	Moses Rotich	21.4.2020						
52.	Product Diversification - recovery strategy policy paper	Angeline Kinyajui	21.4.2020						
53.	Product Diversification - recovery strategy policy paper	Milcah Ngosi	21.4.2020						
54.	Reports submission	Team	25.4.2020						
55.	Reports dissemination	Team	27.4.2020						





REPUBLIC OF KENYA

MINISTRY OF TOURISM
AND WILDLIFE

CONTACT US

NSSF Building, Block A
15thFloor, Eastern Wing.

+254-020-2724646

ps@tourism.go.ke

www.tourism.go.ke