



GOVERNMENT OF KENYA

MINISTRY OF TOURISM AND WILDLIFE

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



RESEARCH REPORT BY THE NATIONAL TOURISM CRISIS STEERING COMMITTEE UNDER THE MINISTRY OF TOURISM AND WILDLIFE, KENYA

REPORTS



MINISTRY OF
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AND WILDLIFE

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www.tourism.go.ke



MINISTRY OF
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Recovery Strategies in Brief



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Executive Summary



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MINISTRY OF
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POLICY BRIEF ON
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Product Improvement and Diversification Strategy for Kenya



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Digitizing Travel and Tourism Industry in Kenya



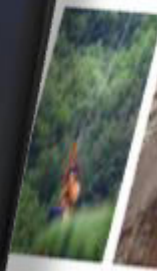
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MINISTRY OF
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Domestic Tourism Recovery Strategies For Kenya



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The study collected data from:

1. In-depth interviews

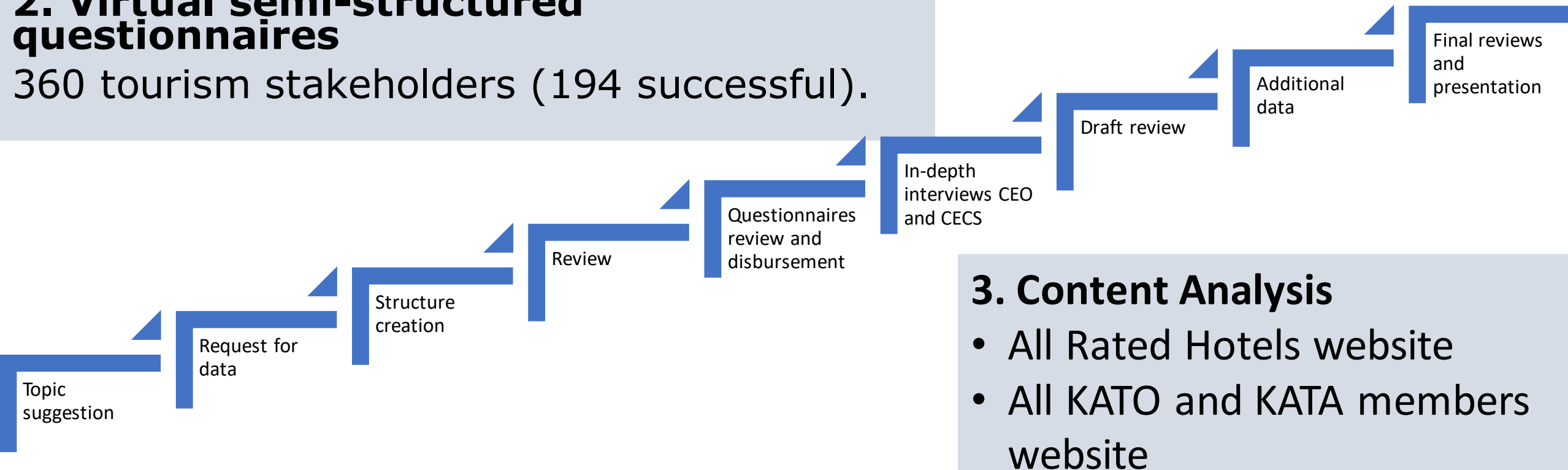
- 9 CEOs of Tourism State Corporations,
- 11 CEOs' of Tourism Associations,
- 47 officers of County Executive Committees (CECs) (19 successful).

2. Virtual semi-structured questionnaires

360 tourism stakeholders (194 successful).

Methodology

Chairman, CAS, commissioned the research in March 2020.



3. Content Analysis

- All Rated Hotels website
- All KATO and KATA members website

THE NATIONAL TOURISM CRISIS STEERING COMMITTEE



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GAZETTE NOTICE NO. 2701

ESTABLISHMENT OF THE NATIONAL TOURISM CRISIS

STEERING COMMITTEE

(a) To be the crisis management co-ordination, response and steering organ for all crisis in the tourism industry

Pre-Crisis Phase

Onset of Crisis Situation

Crisis Emergency Response Phase

Post – Crisis Intermediate Phase

Recovery Phase

Resolution Phase

- GTRCMSC in KU is the think tank on resilience and crisis management

7. The Global Tourism Resilience and Crisis management Satellite Centre at Kenyatta University shall be tasked with researching, capacity building, creating, producing and generating knowledge, toolkits, guidelines and policies on tourism resilience and crisis management.

GLOBAL TOURISM RESILIENCE AND CRISIS MANAGEMENT SATELLITE CENTRE (GTRCMSC) IN KENYA

Purpose: To carry out policy - relevant research and analysis on **destination preparedness, management and recovery.**

Leadership: Main Center in Jamaica

- **BOG Chair** - Dr. Taleb Rufai former UNWTO Secretary General
- **Co- Chaired** - Hon Edmund Bartlett, Minister of Tourism for Jamaica
- **Regional Co-Chair** - H.E. Uhuru Kenyatta (Kenya President)
- **Board Member** - Hon. Balala, CS Tourism and Wildlife

Leadership: Satellite Centre – Kenya

Patron / Regional Co-Chairperson GTRCMC
H.E. Uhuru Kenyatta (Kenya President)

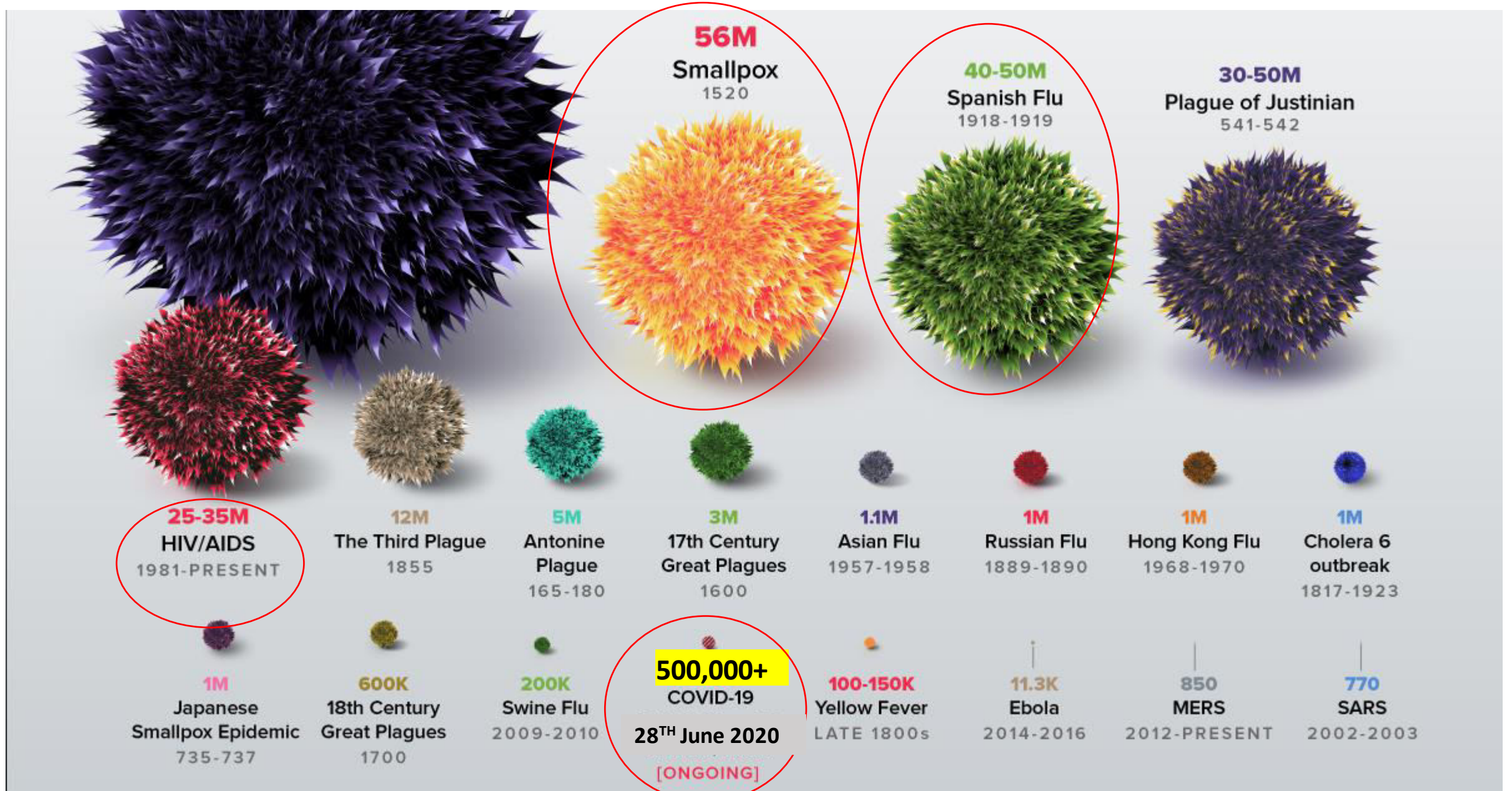
Chairperson, Board of Governors
Hon. Balala CS Tourism and Wildlife

Co- Chairperson, Board of Governors
VC, KU, Prof Paul Wainaina

Director, GTRCMSC
Prof James Kung'u, KU.

BACKGROUND

A visual history of pandemics



Date	Event
12/12/2019	1 st case in Wuhan City of China
11/3/2020	Declared a pandemic
12/3/2020	1 st case in Kenya

Types	World	Africa
Confirmed cases	10K	370K
Deaths	500K	9K
Recovered	5M	170K

162,478 tested

5,811 confirmed cases

3,734 active cases

141 deaths

1,936 recovered



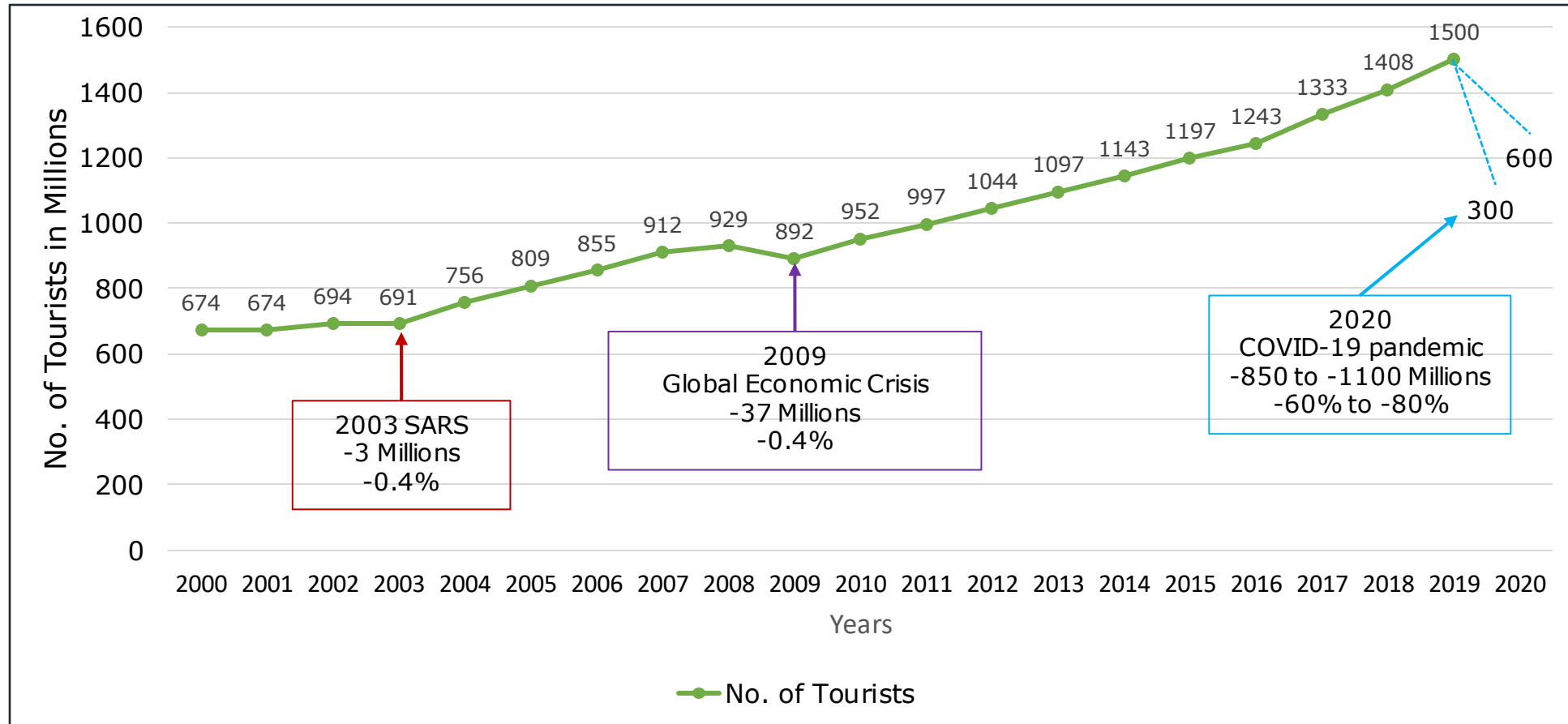
40 counties account for all cases:

NAIROBI 2,899	MURANG'A 10
MOMBASA 1,404	ISOLO 9
BUSIA 397	NYERI 9
KAJIADO 239	KERICHO 7
KIAMBU 203	BUNGOMA 6
MIGORI 108	HOMA BAY 6
UASIN GISHU 81	KISII 4
KILIFI 55	LAIKIPIA 4
MACHAKOS 55	NANDI 4
NAKURU 53	KAKAMEGA 3
KWALE 52	MAKUENI 3
TAITA-TAVETA 31	TRANS NZOIA 3
SIAYA 27	EMBU 2
GARISSA 26	NAROK 2
KISUMU 21	VIHIGA 2
MANDERA 18	BOMET 1
WAJIR 17	ELGEYO MARAKWET 1
MERU 16	KIRINYAGA 1
TURKANA 16	MARSABIT 1
KITUI 12	NYAMIRA 1

27th June 2020

Tourist Numbers in the World

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).



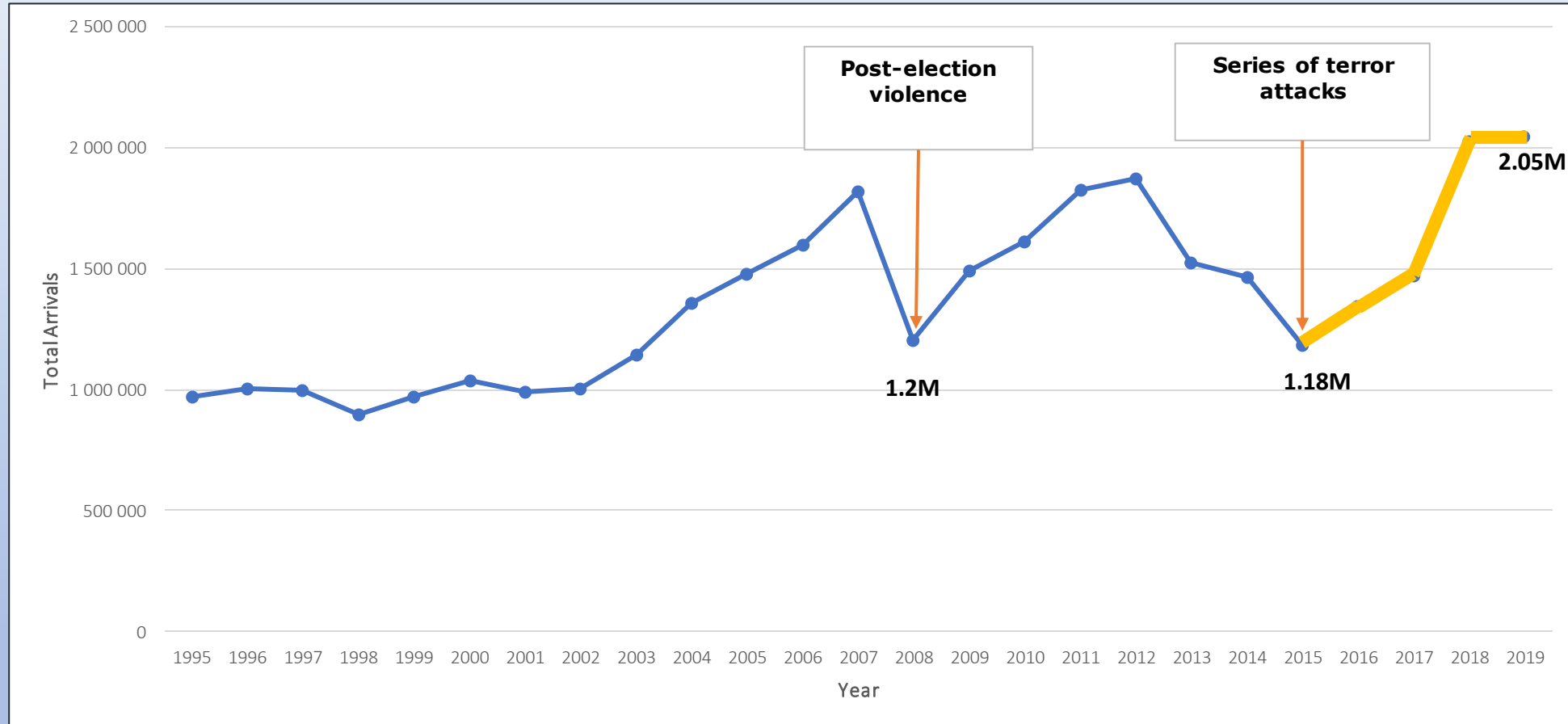
100 to 120 million jobs globally at risk

Source: UNWTO (2020)

International Tourist Arrivals in Kenya from 1995 to 2019

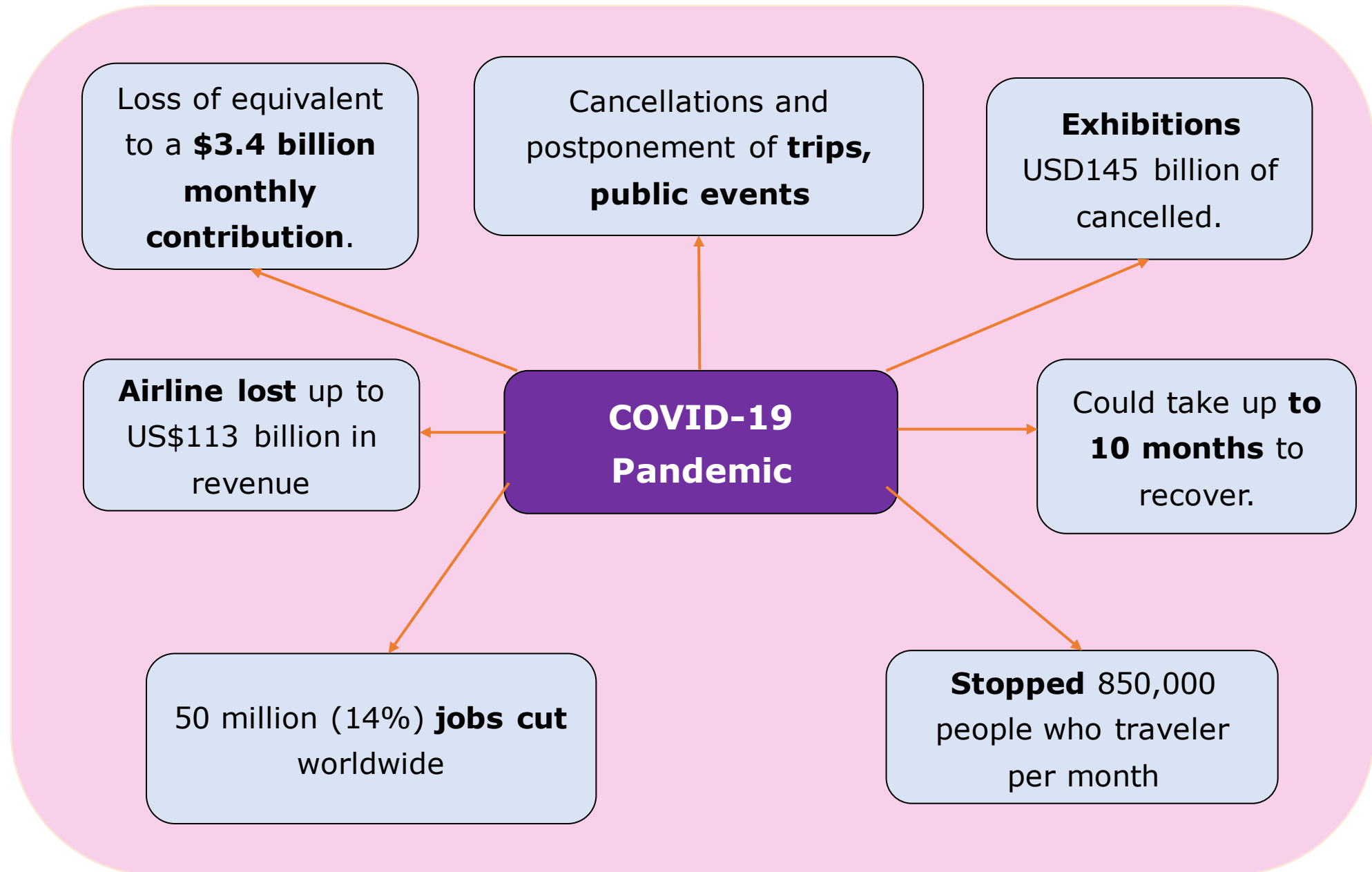
Arrivals grew by 3.9% (2.02M -2018 to 2.05M – 2019) after a 37.33% from 1.47 million in 2017.

International Arrivals in Kenya

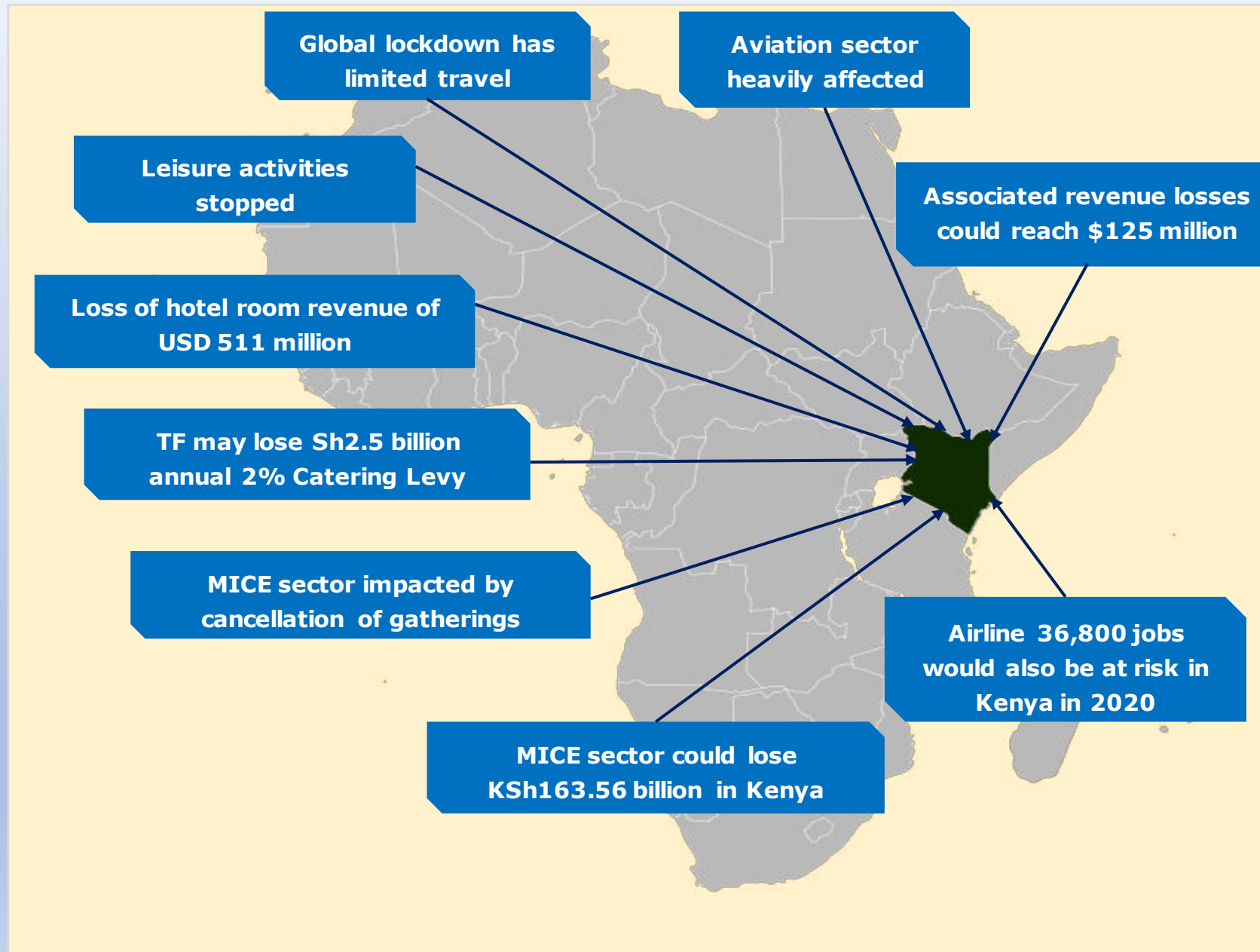


- Earnings – USD1.6 billion receipts. 10% of the country's GDP. 1.6 Million jobs.
- Domestic tourists bednights - **4.6M in 2018.**
- International tourists bednights – **4.0M in 2018 (KTB, 2020)**

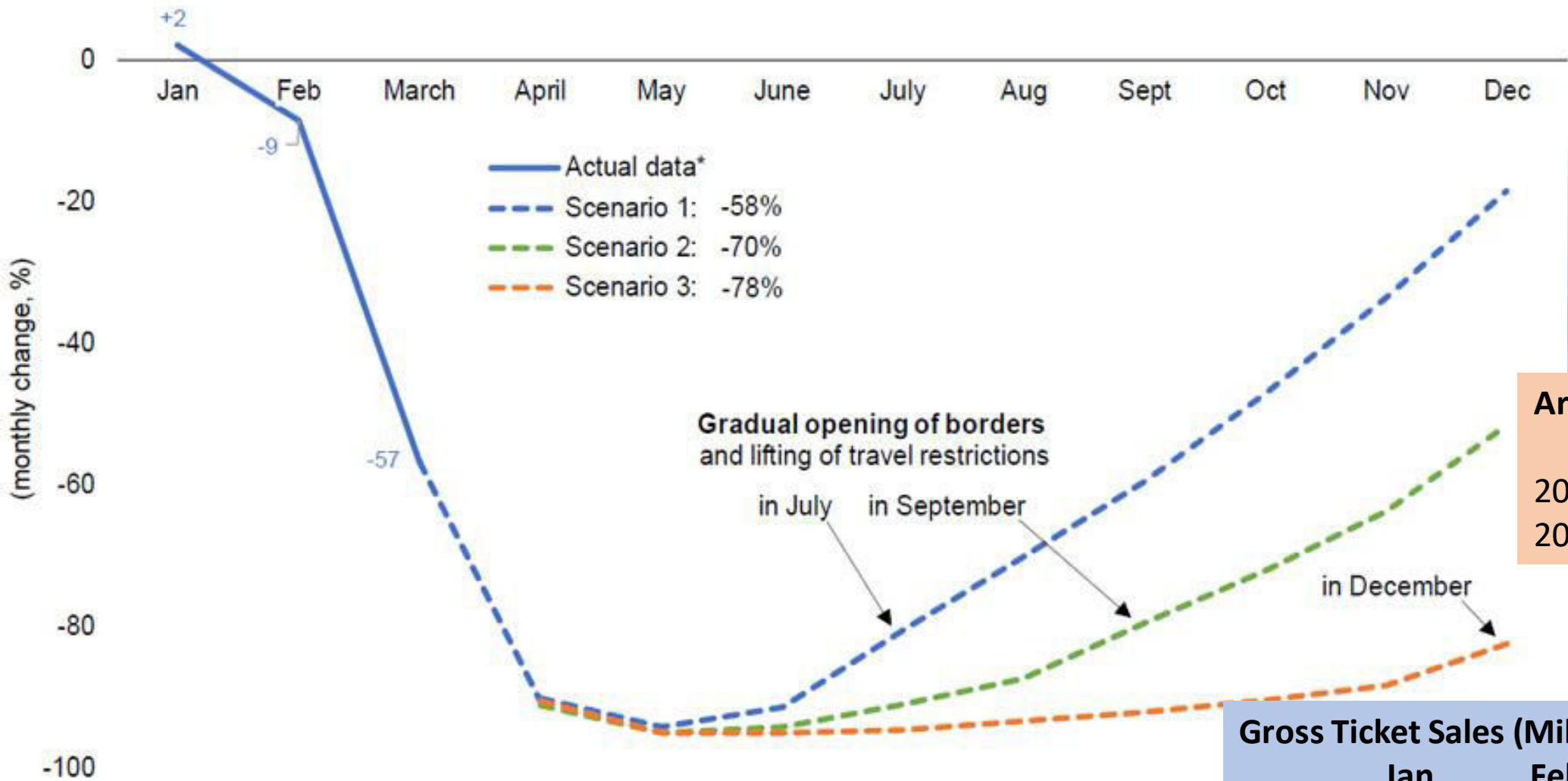
Impact of COVID-19 on Travel and Tourism in the World



Impact of COVID-19 on Tourism in Kenya



International tourist arrivals in 2020: three scenarios (YoY monthly change, %)



Kenya arrivals 2020
Scenario 1 – 861,000
Scenario 2 – 615,000
Scenario 3 – 451,000

Arrivals in Parks (KWS)		
	Jan	Feb
2019	132,389	147,499
2020	136,837	150,115

Gross Ticket Sales (Millions) (KATA)				
	Jan	Feb	Mar	Apr
2019	57	34	40	38
2020	33	31	11	0.03

Source: UNWTO (2020)

Measures taken - world

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”

GERMANY

- EUR 600 billion - Economic **Stabilization Fund** - for eg state guarantees for liabilities
- EUR 50 billion (no credit) for small companies
- Deferral of tax payments

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 travelers and make tourist destinations more attractive
- Government to send advisers and certified tour guides to accommodation facilities before subsidies & train on hosting
- Visa restrictions

Source: UNWTO (2020)








MEASURES TAKEN BY KENYA

Government has set aside Ksh.500 million (USD 4.7 million)

- to help the tourism sector recover from the COVID-19 outbreak.
 - To **restore destination confidence** to ensure that Kenya remains a preferred travel destination globally and
 - **Post-coronavirus recovery strategy** in all Kenya's key source markets.

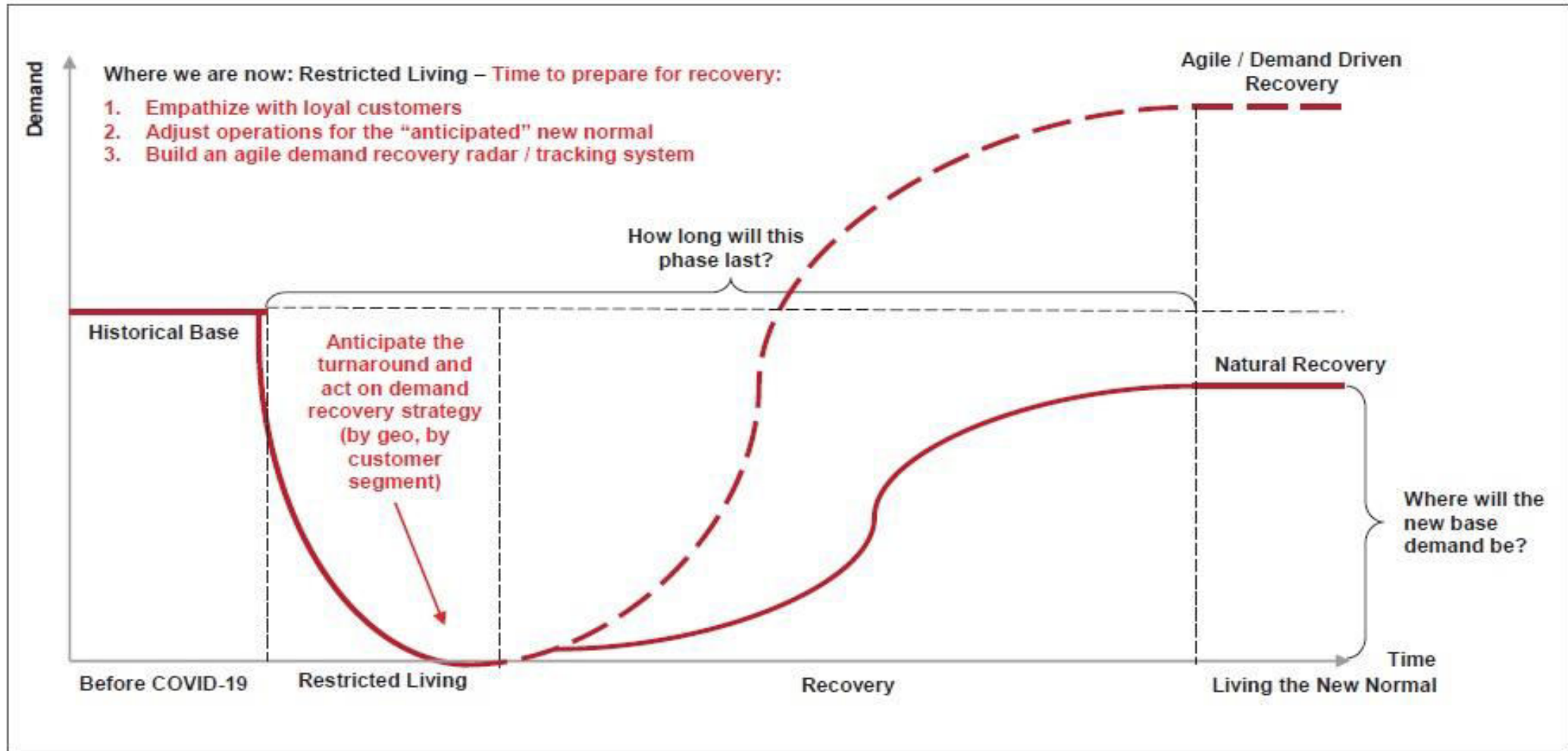
KSH.53.7BILLION ECONOMIC STIMULUS PLAN



 1	INFRASTRUCTURE Ksh 5B Rehabilitation of access roads and footbridges
 2	EDUCATION Ksh 6.5B Hire 10,000 teachers & 1000 ICT interns to support digital learning. Acquisition of 250,000 locally fabricated desks
 3	SMEs Ksh 10B Fast-track payment of outstanding VAT refunds and other pending payments Ksh 3B seed capital for SME Credit Guarantee Scheme
 4	HEALTH 5,000 additional healthcare workers to be hired for 1yr. Ksh 1.7B for the expansion of bed capacity in public hospitals
 6	TOURISM SOFT LOANS to hotels through Tourism Finance Corporation TFC. 2B to support Hotel Industry. Ksh 1B to engage 5500 community scouts. Ksh 1B for 160 conservancies
 7	ENVIRONMENT Ksh 850M Rehabilitation of wells, water pans and underground tanks in the Arid and Semi-Arid areas. Ksh 1B for flood control. Ksh 540M for Greening Kenya Campaign
 8	BUY KENYA BUILD KENYA Ksh 600M To purchase locally manufactured vehicles

#TourismCares campaign

COVID – 19 and Tourism In Kenya: Recovery Strategies

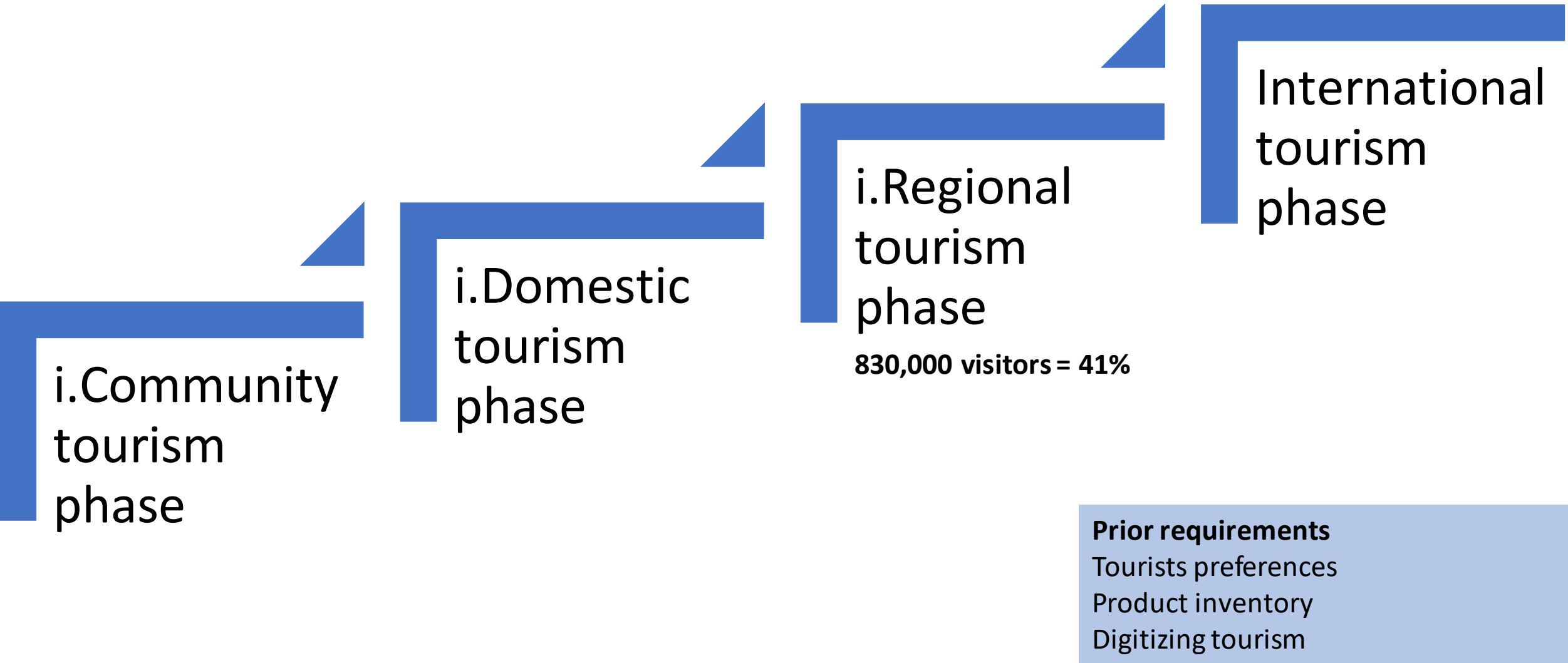


Immediate Recovery Strategies (Before travel re-opens)



Medium Term Recovery Strategies (From opening to Six months after)

Staggered re-opening approach



Medium Term Recovery Strategies (From opening to Six months after)



**Communication
and marketing**



**Financial
Strategies and
Partnerships**

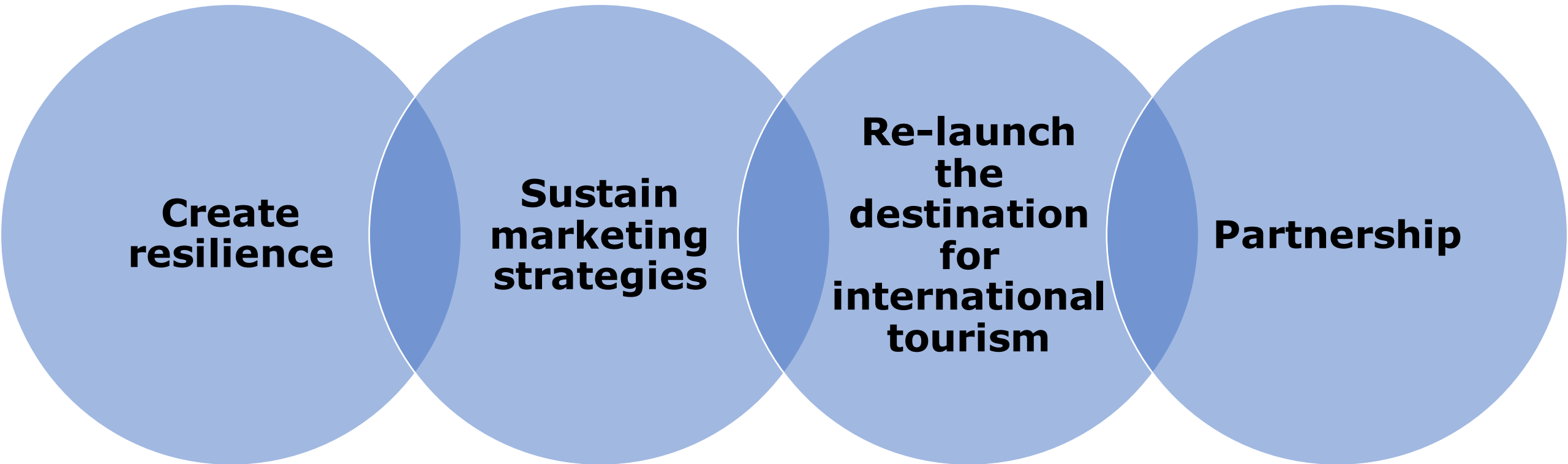


**Product
improvement and
diversification**



**Boosting
consumer
confidence**

Long-term Strategies (Beyond six months after travel re-opens)



Key recovery strategies suggested

- Domestic tourism recovery strategy
- Product improvement and diversification recovery strategy
- Digitizing tourism recovery strategy

Domestic Tourism Recovery Strategy

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

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

Why governments promote domestic tourism:

- Integration, cohesion and pride
- Cushioning industry



Middle class in Kenya

37% of the **total employed population** = 1.02M

Domestic Tourism Growth Strategies



Target
Middle
Class –
1.02M



1 week
national-
wide
holiday



Repackage
product



Campaigns



Information
and ease of
purchase



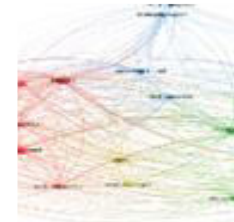
Holidays as
non-wage
benefits



Organized
road
transport










Circuits






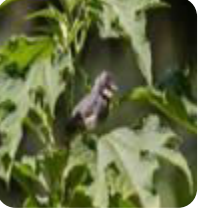
Research

Tourism product improvement and diversification

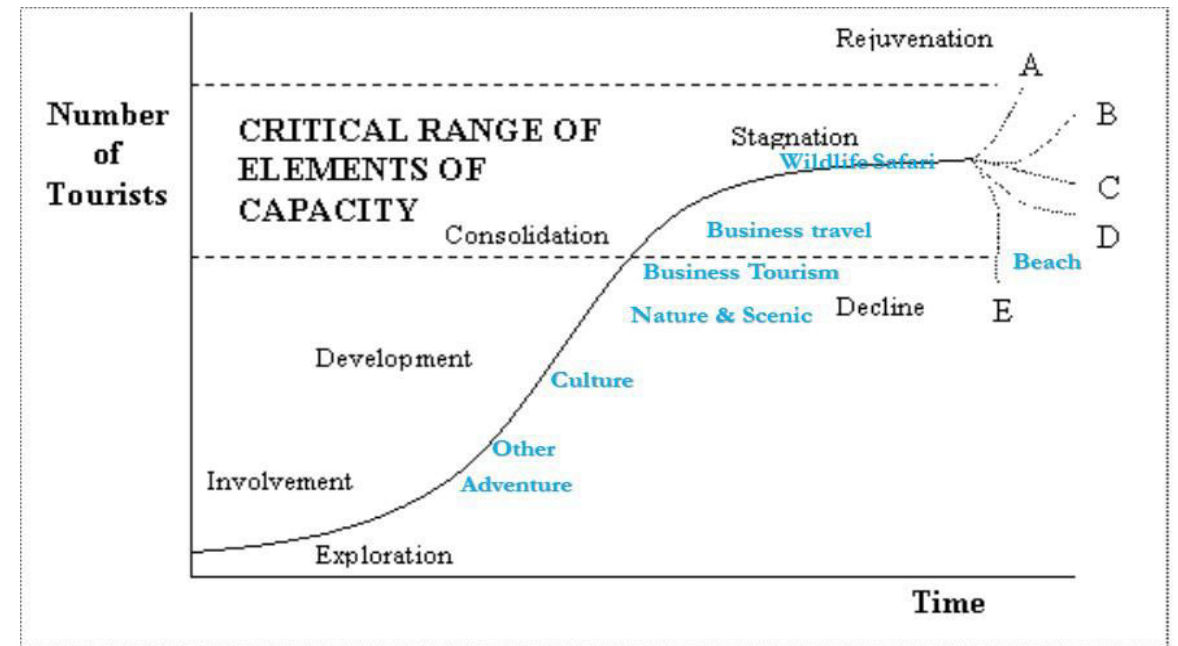
Core tourism experiences in Kenya

							
•Beach and marine <ul style="list-style-type: none"> • Coast 	•African Safari <ul style="list-style-type: none"> • Masaai Mara and Amboseli 	•Wildlife <ul style="list-style-type: none"> • Rift Valley, Central and Western 	•Nature <ul style="list-style-type: none"> • Rift Valley, Western and Masaai Mara/ Amboseli 	•Scenic <ul style="list-style-type: none"> • Central and Northern 	•Culture and Heritage – <ul style="list-style-type: none"> Nairobi, Coast and Masaai Mara 	•City <ul style="list-style-type: none"> • Nairobi 	•Business Tourism <ul style="list-style-type: none"> • Nairobi, Coast

Secondary tourism experiences in Kenya

			
Adventure – Coast, Rift valley, Central	Sports – Nairobi, Coast, Rift Valley, Central	Desert – Northern	Other – Central, Rift Valley, Western

Tourism experience lifecycle status



Product Improvement and Diversification Strategy

Kenya needs to:

- improve,
- develop,
- diversify,
- re-package and
- promote other tourism products in addition to the **Africa safari** and **beach** experiences.



Key strategies are:

Geospatial presentation of Tourism resources in Kenya.

Capturing Experiences and information.

Interpretation of the tourism product.

Packaging Tourism Products.

Pricing revision for Tourism Products in Kenya.

Digitizing travel and tourism.

Promote Community - based tourism.

Fight against the Spread of Disinformation.

Digitizing Travel and Tourism Industry in Kenya

Knowledge and Experiences Capturing and Sharing for Kenya Tourism Industry



Interpretation of the tourism product



Geospatial presentation of Tourism resources in Kenya



Digital marketing



Fight against the Spread of Disinformation



Creation of Integrated Destination Management System



Knowledge capturing

Video, images, and graphics.

Samburu, Kenya 2002



Packaging

Text, audio, videos, images, graphics.

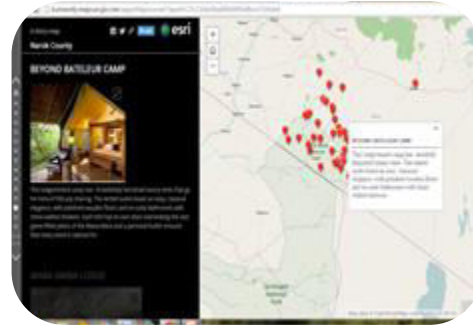
Digital Tourism Resources



Reports on books, brochures, CDs, magazines and Flash disks.



Maps.



Story maps.



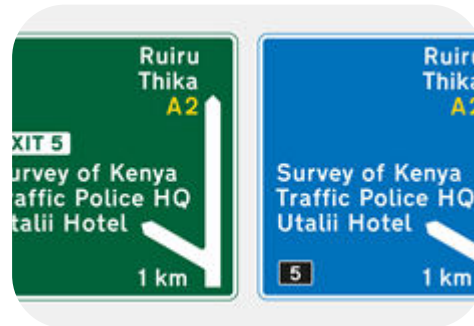
Live streaming.



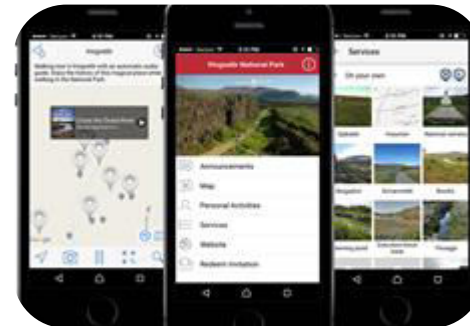
Digitized Tourism Information Centers.



Electronic display books/brochures/catalogues.



Proper signage.



Mobile app.



Interactive integrated destination management system, with booking capabilities.

Tourism Industry Protocols

Preparedness
plan



Training



Communication



Integrated
technologies

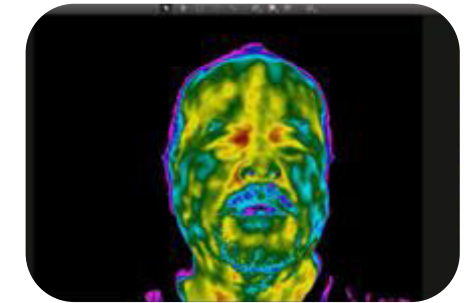
Response plan



Signposting



Physical distancing



Thermal scanning

Coordination
committee



Personal protection
equipment



Guidance for
cleaning

Guest
guidelines

Way forward

Maintain
constant
communication

Monitor and
evaluate
adherence to
protocols

Research on
tourists
preferences
-
Price
revisions

Tourism
Products
Inventory

**Creation of
an
Integrated
Destination
Information
System.**

Develop the National Tourism Risk and Crisis Management Strategy

Ancillary Services - Kenya



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Name of the County

Name of the Ancillary Service

Type of Ancillary Service

- ☐ Banking
- ☐ Forex Bureau
- ☐ Shopping Mall
- ☐ Curio
- ☐ Specialty Shop

Accommodation and Restaurants Inventory - Kenya



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Name of the County

Name of the facility

Type of Accommodation or Restaurant

- ☐ Hotel

Information
consolidation
Demand
Analysis
Supply Analysis
Intermediaries

Tourists Preferences

Through Co-joint analysis and Choice Experiments

Transportation Inventory - Kenya



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Name of the County

Name of the type of means of transport

Mode of transport

☐ Mountaineering

☐ Water sports



☐ Biking

☐ Visiting Art Galleries



☐ Visiting Museums

☐ Visiting Souvenir shops



☐ Sky diving

☐ Water related festivals



Ancillary Services - Kenya

Website to access more information

Photograph of the Ancillary Service1



Photograph of the Ancillary Service2



Photograph of the Ancillary Service3



Location of the Ancillary Service

1°12'53.6"E ± 275 m



Ancillary Service Contact Information

Attach Ancillary service tariff or other information (does not have to be accurate, the geopoint will be corrected by the research team)





Thank you