



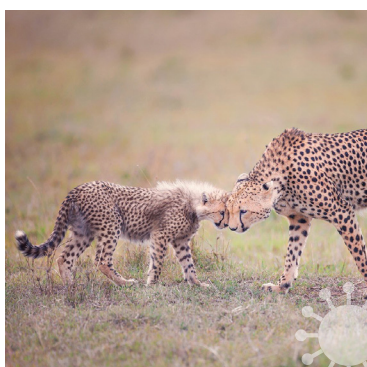
REPUBLIC OF KENYA

MINISTRY OF TOURISM AND WILDLIFE

RESEARCH REPORT ON

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

Recovery Strategies in Brief



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

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	<ul style="list-style-type: none"> • 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. 	<ul style="list-style-type: none"> • MoTW • MoH • TRA • Private Sector • Resilience Centre
Re-build and promote Kenya as COVID-19 Tourism Resilient Zone	<ul style="list-style-type: none"> • 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. 	<ul style="list-style-type: none"> • MoTW • MoH • KTB • TRA
Training of industry on new requirements and protocols	<ul style="list-style-type: none"> • Mass sensitization to influence behavior change. • Up-skilling/reskilling: <ul style="list-style-type: none"> – Hygiene. – Safety and security. – Maintenance of Resilience zones. – Service delivery in travel and tourism. – Tourists behavior etc. 	<ul style="list-style-type: none"> • MoTW • MoH • TRI • KUC • Academia • Resilience Centre
Knowledge and Experiences Capturing	Collect and packaging tourism products as text, audio, videos, images, graphics, etc.	<ul style="list-style-type: none"> • MoTW • KTB • TRI • Academia
Interpretation of the tourism product	<ul style="list-style-type: none"> • Interpretation of products in website, social media, emails, narratives at the attractions, billboards, disks; onsite and offsite. • Knowledge sharing. 	<ul style="list-style-type: none"> • MoTW • KTB • TRI • Academia
Packaging tourism information and experiences	<ul style="list-style-type: none"> • Provide modified and new packages. • Creation of itineraries according to source market, income, age, etc. • Develop competitive airline, cruise, train, road etc. packages. 	<ul style="list-style-type: none"> • MoTW • KTB • Academia

Strategy	Activities and Output	Responsibility - Lead
Digitizing Travel and Tourism	Use ICT to: <ul style="list-style-type: none"> • 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). 	<ul style="list-style-type: none"> • MoTW • TRI • TRA
Digital marketing	<ul style="list-style-type: none"> • 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. 	<ul style="list-style-type: none"> • MoTW • KTB • Private Sector
Intensify research activities	<ul style="list-style-type: none"> • 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. 	<ul style="list-style-type: none"> • TRI • Resilience Centre • Academia
Ensure consumer protection and confidence	<ul style="list-style-type: none"> • 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. 	<ul style="list-style-type: none"> • MoTW • Private sector
Prepare a re-launch plan	<ul style="list-style-type: none"> • 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. 	<ul style="list-style-type: none"> • MoTW • Private Sector

Medium Term Recovery Strategies – (Six months after travel re-opens)

Strategy	Activities and Output	Responsibility - Lead
Staggered re-opening approach i.e. <ul style="list-style-type: none"> i. Community tourism phase ii. Domestic tourism phase iii. Regional tourism phase iv. International tourism phase 	<ul style="list-style-type: none"> • 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. 	<ul style="list-style-type: none"> • MoTW • KTB • Private Sector
Financial Strategies and Partnerships	<ul style="list-style-type: none"> • Provision of financial stimulus for tourism investments and operations: <ul style="list-style-type: none"> - 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. 	<ul style="list-style-type: none"> • National government • County Governments • MoTW • Private Sector • TF • TFC • KWS

Strategy	Activities and Output	Responsibility - Lead
Product improvement and diversification strategy	<ul style="list-style-type: none"> 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 	<ul style="list-style-type: none"> MoTW KTB TRI KWS Academia Private sector
Digitizing the travel and tourism industry	<ul style="list-style-type: none"> 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. 	<ul style="list-style-type: none"> MoTW KTB TRI Academia
Communication and marketing recovery strategies	<ul style="list-style-type: none"> 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. 	<ul style="list-style-type: none"> MoTW KTB Private sector
Pricing revision for Tourism Products in Kenya	<ul style="list-style-type: none"> Measuring of Willingness to accept compensation (WTA) and Willingness to pay (WTP) through contingent valuation, experimental auction, conjoint analysis etc. 	<ul style="list-style-type: none"> MoTW KWS County Governments TRI Academia Private sector
Domestic tourism growth	<ul style="list-style-type: none"> 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. 	<ul style="list-style-type: none"> MoTW County Governments KTB KWS Private Sector

Strategy	Activities and Output	Responsibility - Lead
Regional tourism growth	<ul style="list-style-type: none"> • 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. 	<ul style="list-style-type: none"> • National government • MoTW • KTB
Boosting consumer confidence	<ul style="list-style-type: none"> • 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. 	<ul style="list-style-type: none"> • MoTW • TRA • KTB • Private sector



Long-term Strategies (Beyond six months after travel re-opens)		
Strategy	Activities and Output	Responsibility - Lead
Create resilience in the industry	<ul style="list-style-type: none"> • 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. 	<ul style="list-style-type: none"> • MoTW • Resilience Centre • TRI • Academia
Sustain marketing strategies	<ul style="list-style-type: none"> • 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. 	<ul style="list-style-type: none"> • MoTW • KTB • KNCB • Private sector
Encourage international tourists to visit Kenya - Re-launch the destination	<ul style="list-style-type: none"> • 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. 	<ul style="list-style-type: none"> • Immigration Services Department • MoTW • KTB • Private sector
Partnership among stakeholders from all the sectors	<ul style="list-style-type: none"> • 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. 	<ul style="list-style-type: none"> • MoTW • County Governments • Private sector

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