

The Post COVID-19 Opportunities for Tourism in Kenya

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Abstract: *The purpose of this study was to identify the post COVID-19 tourism opportunities in Kenya. The study used a cross-sectional case study methodology, with a population of respondents selected from Kenya Wildlife Service personnel, hospitality sector and private tourism stakeholders within close proximity to some selected National Parks and Reserves in Kenya. Inputs from some visitors were also captured during the data collection. Due to higher number of homogenous population targeted in the study, a total sample size of 85 individuals were contacted through a survey involving both structured and non-structured questions which gave out the primary data. Qualitative and quantitative techniques were used in analysis; with quantitative data analysis done using computer programmes. Though COVID-19 had very serious impacts on the economic sectors globally, tourism sector was among those that faced the biggest threat. The study however found various opportunities were seized by the Kenyan Tourism sector and enhanced both resilience and sustainability. The study concluded that, even though COVID-19 had detrimental impacts on tourism, other opportunities were available for sustenance of the sector and therefore recommended embracing of local and regional integrated efforts and opportunities to beat any threats that may be presented by any future global catastrophes.*

Keywords: COVID-19, Sustainability, Resilience, Strategies, Opportunities

1. Introduction

Tourism sector has for the longest period given preference to the international visitors because of their high valued dollar; but this has always come with it various challenges as witnessed during the COVID-19 pandemic travel restrictions. The pandemic presented a serious setback to most of the global economic sectors like tourism, which left many countries looking for other local and regional available opportunities to help anchor this important sector until the conditions improved.

Kenya identified and seized various local opportunities like domestic tourism and virtual tours (just to name but a few) that presented better returns within the connected subsectors. Regional East Africa tourism destination integration for example between Tanzania and Kenya saw a continuous growth in terms of visitors doing uninterrupted tour visit programmes within the two countries. Kenya also embarked on rural based tourism besides extensive marketing of the country as an ideal venue for Meeting, Incentives, Conferences and Exhibitions (MICE). All these earlier overlooked opportunities were given prominence at the onset of COVID-19 tourism slump and have been seen to unceasingly project positive results that points to the sector's stability, sustainability and resilience at different seasons.

2. Statement of the Problem

When COVID-19 broke out in December, 2019 at Wuhan city in China, little did the global population know that it would cause detrimental impacts on human and their livelihoods. The year 2020 saw rapid infections across the globe and this led to immediate pronouncement of the disease as a global pandemic. This called for isolation of the infected persons, immediate movement restrictions while people started working from home as businesses closed down. The continued movement restrictions and the nature

in which the disease spread projected a very serious threat to the tourism sector because it halted local and international air, water and road transportation. This translated to reduced international visitors to Kenya's major tourist destinations and the subsequent decline in revenue generation. A combination of the pandemic impacts on visitation and other economic issues in the face of both changing global climatic conditions and lack of local fall back opportunities led to decline in the National Gross Domestic Product (GDP); and threatened the very existence of the tourism sector and other dependent subsectors within the tourism value chain. Kenya's high inclination to foreign visitors had previously left the sector exposed whenever a global or regional catastrophe occurred hence leaving millions of employees jobless besides enhancing vulnerability to the sector. This study therefore seeks to identify the post COVID-19 tourism opportunities in Kenya for sustainability and resilience.

3. Literature Review

This segment discusses both the theoretical and the empirical literature review as collected during the study.

Theoretical Framework

The study was guided by the Protection Motivation Theory (PMT), a Rogers's psychology theory which posits that, 'to protect oneself from danger, is a function of threat, severity, vulnerability, coping response and ability to perform with the coping response.' According to Plotnikoff, (2010), PMT further indicates that emotional state of fear influences attitude, behavior change and adaptive strategies. The theory in this context is used to indicate the human response and coping strategies as witnessed in the tourism sector in the wake of COVID -19 pandemic. The remarkable changes in the sector were as a result of the visitor's behavior due to the fear of the pandemic hence the corresponding responses

involving embracing safe tourism alternatives and opportunities for sustenance of the sector.

The theory was developed by Rogers in the year 1975 and revised in 1983 and was meant to define how individuals are motivated to react in self-protection towards a perceived health threat. However, Rogers foresaw a diversification in use of the PMT theory with time either individually or in conjunction with other theories. The PMT was used by the Australian Government on education and awareness on environmental impacts of global climate change in the year 1983 as an opportunity towards alleviating wild fire hazards; and as local coping strategies to ensure acceptable solution to the issues. The awareness creation was among opportunities that led to reduced fires due to increased information on prevention and available survival plans.

Various scholars including Mulilis and Lippa,(1990), Floyd D.L et al., (2000), Grothman and Patt, (2005) Koerth J, et al.,(2013) and Poussin et al., (2014) all concurred that, the objective of PMT is to recognize and assess the risks and threats, and then counter this assessment with effective and operative mitigation options. Currently, the interconnectedness of issues has made PMT applicable to many social problems and was also applied to studies of natural hazards like earthquake in the United States, and floods in Germany and France. In Turkey, Cinar, et al., (2022) indicated that, an online survey conducted on domestic tourists and their holiday preferences during the post pandemic period using the PMT theory; maintained the need for assurance of their health safety before and during an holiday. In spite of this, the domestic tourists still preferred local available opportunities because they felt conversant with local environment unlike when visiting external destinations.

Pandemics and Global Responses: Globally, many pandemics have occurred at different times. The Severe Acute Respiratory Syndrome (SARs) in China and Hong Kong in the year 2002 for example devastated the tourism industry because of the restrictions related to those of COVID-19 According to Pine, Ray & McKerracher, Bob (2004), the impacts of SARs on tourism sector in Hong Kong were felt almost immediately but the sector bounced back after the decline in infections due to high investment on local strategies and embracing local opportunities towards rebuilding the country's image. MacDougall & Heather (2007) also indicated how the 2003 SARs epidemic in Canada met an unprepared country in terms of handling pandemics or disasters and this was then a good baseline for realizing the need to focus on future strategies and opportunities for coping with the new normal as promoted by the protection motivation theory.

Regionally, Kebede S, (2010) highlighted how some of the African countries had earlier reported epidemics including Rift Valley fever, dengue fever, meningitis, ebola, yellow fever, hemorrhagic fever among others. These, like Covid-19 had devastated the economic sectors of the affected countries and required huge investment on relevant opportunities to ensure they went back to normalcy.

A comparative analysis by World Health Organization (W.H.O, 2020) between Covid-19 pandemic and other past pandemics like Severe Acute Respiratory (SARs) of 2003 indicated that SARs fatality rate was about 10% while Middle East Respiratory Syndrome (MERs) of 2013 had an approximate fatality rate of 34.4% of all the infected persons. The W.H.O report in 2020 indicated Covid-19 could have spread faster and with a higher death rate.

Africa was said not to have experienced serious impacts from Covid-19, but cases were still substantial with serious implications on human life. However, though resilience was comparatively better than in other regions of the globe, economic downturns remained the same or was much affected. Covid-19 disordered many of the critical Kenyan sectors and the economic recovery opportunities were anchored on a whole of government approach involving Government Ministries, Departments and Agencies (MDAs). Onboard also were development partners, Non-Governmental Organizations, (NGOs), private sector entities; and all the efforts were ideally skewed towards sectors that had cross cutting impacts on other sectors in their day-to-day operations. Tourism sector for example supports other subsectors like agriculture, energy, water, transport, and labour just to name but a few, while other like Information Communication and Technology (ICT) ensures all other sectors thrive due to online transactions like e-learning, virtual meetings, online financial transactions (FinTech), marketing, online trade(e-commerce) and information dissemination,(FSD,2021). Agriculture, Health and manufacturing are other sectors governments give emphasis to due to their role in enhancing human security in terms of food and health.

Muragu et al., (2021) gave an analysis of the impacts of COVID -19 on various sectors, the economic dimensions and the various recommendation on the opportunities that could set the Kenyan post pandemic tourism to recovery. The marketing strategies employed by the Ministry of Tourism wildlife and heritage in Kenya were appeals to dispel fear and encourage visitation to Kenya's tourism destinations based on the various measures that ensured safety and security of visitors. This study looked at the COVID-19 pandemic fear which contributed to visitor's behavior change and slump in tourism, the coping strategies and the available opportunities through the lens of the Protection Motivation Theory. A web based survey in Canada used the same theory to examine the post pandemic transit behavior which indicated that majority opted to get vaccinated while others embarked on local opportunities by avoiding travelling (Mashrur et al. 2023).The Protection Motivation Theory application was therefore anchored on two schools of thought which included the threats appraisal and the coping appraisal in an effort to get the best available opportunities towards sustenance of the sector.

Empirical Literature Review

Although measures and policies to revive the tourism sector after the Covid-19 and earlier pandemics had been employed across the globe, the Organization for Economic Co-operation and Development (OECD, 2020) indicated the need for reconstruction of a tourism sector that must be sustainable and able to withstand several pandemics and

other catastrophes. It stressed on the need to rebuilding tourism as a priority through identification of opportunities that are more sustainable and resilient in the future. Different nations employed structures and strategies that aimed at ensuring travelers' safety, strategies that ensured recovery, identification and endorsement of viable opportunities like local tourism, provision of adequate information to the end destinations and strengthening cooperation between and within regional states to promote resilience and sustainability in the tourism sector.

The UNWTO, (2020) and Chen, T. (2022) gave guiding strategies on tourism recovery opportunities including assistance to small scale entities and of protection of jobs, improving visitor confidence through strategies on safety and security besides increased Job value through innovation and technology. World Bank (2020) pointed out and financed opportunities touching on small and medium income enterprises which were said would contribute much of the GDP.

Locally, the available opportunities were said to be diverse and when exploited fully could revolutionize the status quo in the sector. The Kenya's domesticated Post Covid-19 opportunities were available in domestic tourism, promoting regional integration, product diversification and tourism digitization (GoK, 2020). Domestic tourism was identified as a stop gap measure in different countries during issues of international importance like pandemics and this appeared to take shape in Kenya where citizens were seen to develop a culture of travelling to different destination within the country. However, one fear associated with this group was said to be lack of consistency and hence the need for more strategies to harness this sub segment if sustainability of the sector was to be attained.

4. Methodology

This research was a cross-sectional case study that was meant to identify the post COVID-19 tourism opportunities in Kenya. The total number of participants was 85 individuals from the sector, with participants drawn from the Kenya Wildlife service, hotels, and other stakeholders in the sector comprising of those at managerial levels and juniors within different departments. Visitors to National Parks also gave their views all which contributed to the primary data of the study. Secondary data was obtained from review of literature from books, journals, policy documents, case studies, reports and internet sources. The data was analyzed using Qualitative and quantitative methods using computer applications which gave visitor trends for the period before and after onset of COVID-19; and the identified opportunities that were embraced toward enhancing sustainability and resilience of the sector in Kenya.

At onset of COVID -19 in Kenya, a study using cross sectional descriptive method was also adopted by the Ministry of Tourism ,Wildlife and Heritage through the

Tourism Risk and Crisis Management Committee which looked at the impacts of the pandemic on tourism in Kenya. Earlier, Cooper & Schindler, (2006) had also highlighted the advantages of cross sectional method as being effective, low cost and providing ability to access information easily.

5. Study Findings and Discussion

In trying to get more insights, this study sought responses from the wildlife sector wide spectrum of personnel especially from Kenya wildlife Service (KWS) on the visitor trends for the period before and after onset of COVID-19 pandemic. This was meant to help ground the possible opportunities towards arresting the declining trend realized during the COVID-19 pandemic. KWS is the government agency that is mandated with protection of wildlife in the country therefore plays the biggest role in the wildlife based tourism in the country. The study also sought responses about local opportunities for post Covid-19 tourism sustainability and four main opportunities were identified under the following subheadings; promotion of domestic tourism, reduction in levies and fees, promotion and diversification of tourism products, and regional tourism integration.

Tourism Status Kenya: What is the visitor trend in the Kenya's most visited National Parks and Reserves for the period 2019 to 2021?

Tourism status can only be depicted by looking at the trends, and any decline is corrected by identification of best strategies and opportunities that can arrest the situation. The Pre- and Post Covid-19 tourism trends evaluation from the KWS data indicated a good tourism performance before onset of the pandemic with an anticipated 7billion or more visitors in Kenya's ten most visited parks and reserves for the period 2018 to 2021 (KWS, 2022).

The study however found a tremendous decline in visitor trend for the period under study (2019 - 2021) under the two categories of (domestic and International) had occurred but recovery was much faster in the domestic tourism market compared to the international market. This led to realization of the volatility in international tourism market and the need for identification of long-lasting strategies involving local and regional opportunities that could be harnessed in sustaining the sector in Kenya in times of unforeseen occurrences. The study also found that, domestic tourism sub-sector was self-regulating because very little investment in terms of facilities oriented to domestic clientele were rarely given prominence in the general industry programmes. However, global domestic tourism was seen to account for over 70% of the total visitation between the year 2017 and 2018; and this gave this study the basis for concluding that there was a need for nurturing the domestic tourism opportunity if sustainability was to be improved in Kenya's tourism sector at different times.

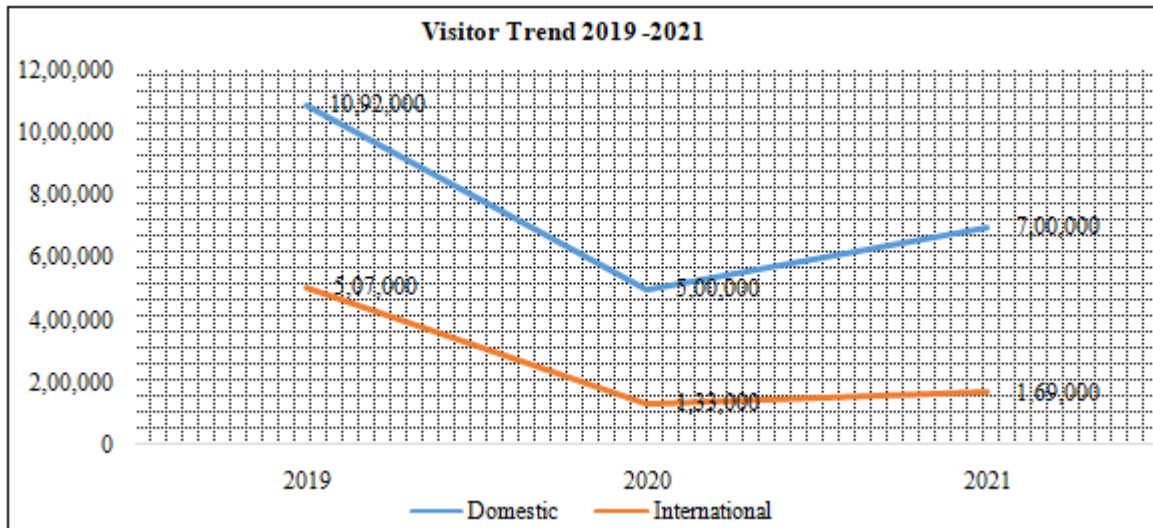


Figure 1: Visitor Trend at Selected Kenya’s National Parks - (Source - KWS, 2023)

In trying to get the respondents views, different open and closed questions were administered through a survey undertaken at different highly visited parks and reserves in Kenya, hotels and other stakeholders in the industry.

Table 1: What Post Covid -19 opportunities exist for Tourism sustainability in Kenya

Statements on – Post Covid-19 Tourism Opportunities in Kenya.		
1.	Promote growth of Domestic tourism	22.2%
2.	Reduction in levies and entry fees to visitor facilities like National parks	25.5%
3.	Product Development and Diversification in Kenya	25.9%
4.	Promotion of Regional Tourism	26.4%

Post COVID-19 opportunities for Tourism (Source: Researcher, 2023)

This study identified four major post COVID -19 tourism opportunities from the respondents including; promotion of domestic tourism, reduction in levies and fees, product development and diversification and promotion of regional

tourism (Table 1 above). Other opportunities mentioned by different respondents included enhancing marketing and involvement of all sector stakeholders in development of the industry through programmes like meetings, conferences and exhibitions.

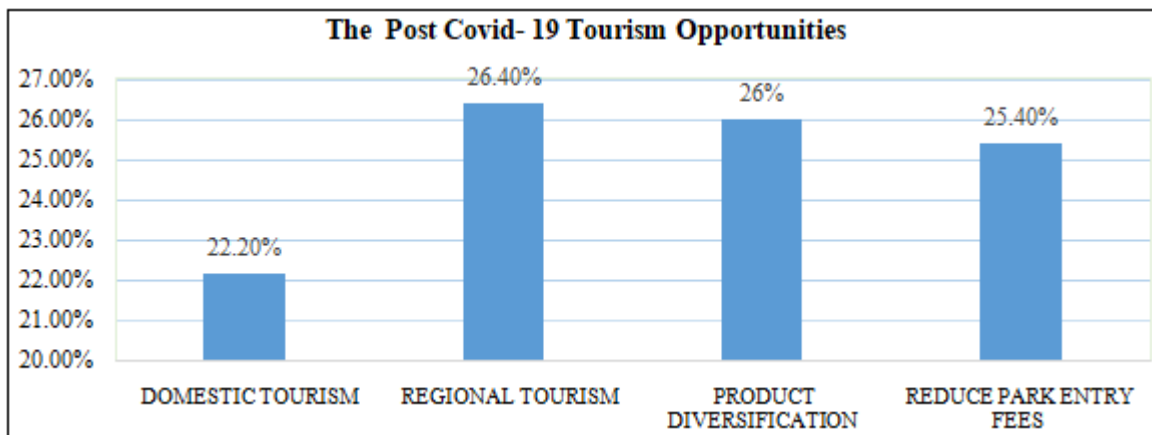


Figure 2: The Post COVID- 19 Tourism Opportunities in Kenya (Source: Researcher, 2022)

Promoting Domestic Tourism as a post Covid-19 opportunity and a recovery strategy

Out of the total number of respondents, 22.2% advocated for promotion of domestic tourism, which had been seen as a major driver of the tourism sector in many economies globally. In Kenya Osiako, P.O. & Szente, V. (2021) said domestic tourism was evaluated based on visitor arrivals, levels of spending and excursions in various scenic places like National Park, Reserves, and hotels among others. However, even though very little on impacts of domestic tourism to national economy had been studied, indicators on

the status and the growing trend involving the working class youth who forms the largest population segment of middle income earners in Kenya was said to be an avenue that could be fully harnessed as an opportunity towards the sector recovery.

Kenya’s domestic tourism resilience was realized during the major disasters like the Kikambala bombing in the year 2002, the post-election violence of 2007, the September 2013 West Gate Mall attack, El –Niño rains flooding, the Ebola in West Africa in 2014 among many other issues that

led to restriction of foreign visitors to Kenya. An increase in local tourist numbers grew from 3.6million visitors in 2017 to 3.97million in 2018, a record 9.03% growth, (GoK, 2020). However, the notion that domestic tourism is not well paying compared to the dollars paid by the international tourists, it is seasonal in nature, have low income and are low spenders were some of the reasons that respondents ticked against domestic tourism being the best opportunity

that could propel the sector to sustainability after the Covid-19 pandemic.

International tourism was said to decline because of varied forces involving occurrences like epidemics, pandemics, floods and others all which led to advisories to travel to Kenya among other destinations. Reliance on this category of visitors was therefore anticipated only when conditions are favorable for them to travel from their countries.

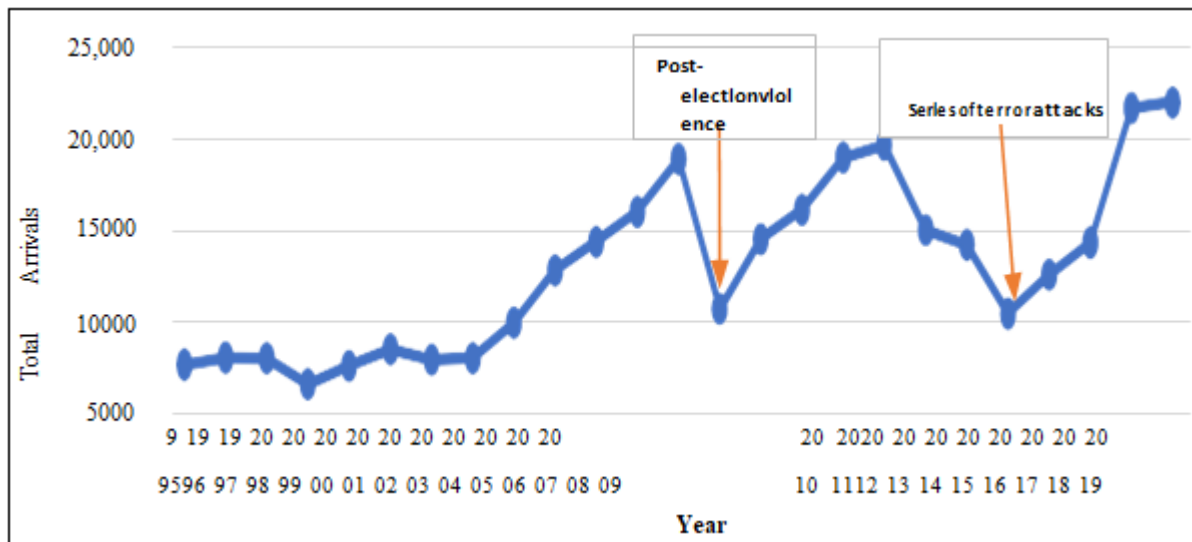


Figure 3: International tourist arrivals in Kenya between 1995- 2019 (Source - MoTW-2020)

Reduction in payable levies and fees

Affordability of Kenyan destinations was identified as a main constraints that made Kenya more expensive as a tourism destination for tourists. The sector managers had decried for long especially for reduction of levies and fees for the necessary permits, licenses and other associated costs to make visiting the country cheaper. This aspect therefore attracted a 25.5% rating in fees and levies reduction which was explained would help boost domestic visitation. The hard economic times in Kenya coupled with loss of jobs and other sources of income during the Covid-19 pandemic after closure of businesses and other sources of income meant little surplus for non-essential aspects like visits and tours. However, the citizens agreed to the idea that they needed to discover areas away from homes hence the call for reduction in the levies and fees to tourist destinations.

Product Development and Diversification

Opportunities associated with new products, new circuits, new facilities/infrastructure and enhanced marketing were said could be aligned towards drawing in high-value visitors. The post COVID-19 tourist was said to have had a change in behavior with an inclination towards less congested destinations like countryside (rural tourism), much outdoor activities, use of air BnB accommodation facilities as opposed to hotels, and high preference for destinations closer to good medical services. Product diversification opportunity was seen as key because of the availability of the associated resources and this aspect was therefore supported by 25.9% of the total respondents in the study.

Other opportunities cited under product development and diversification included opening new circuits within less

congested and less explored areas included rural agro-tourism, bird watching, camping, botanical trips, sundowners and hill and mountain climbing. Due to the good internet connectivity in Kenya, many respondents felt the opportunity for digitizing tourism activities including the virtual tours (smart tourism) were some of the opportunities viable post COVID -19 pandemic and needed to be promoted. Repackaging tourism product with local market interests, increasing the attractiveness of the domestic market through campaigns and provision of the relevant information were other backup opportunities relevant towards post Covid-17 tourism promotion.

Promotion of Regional Tourism

Out of the total number of respondents, 26.4 % advocated for promotion of regional tourism, which was identified as an aspect that would be ideal for expanding the tourism market beyond Kenya. Regional tourism circuit integration had been ongoing in most parts of the world including Asia and European blocks and this therefore contributed to opening up of their tourism markets earlier after COVID-19 decline. These idea was seen to be new within the East African countries but was a viable opportunity. This study sought opinions from the senior managers in the wildlife sector because majority of the international visitors came to Africa with different objectives like to experience the wilderness life while interacting with animals while others came for video documentaries in the wilderness. Kotler, P., & Turner, R., (2000) asserted marketing strategy was a commercial role towards increasing consumption, and further proposed the same idea of marketing mix which involves the price, place and product in attracting both domestic or

international tourists which was said to be ideal for the regional integration shift.

The East African region was said to have various attractions ranging from beaches, some of the world class recognized parks and reserves like Tsavos.- Mkomazi , Maasai-Mara-Serengeti and even Kilimanjaro and Mount Kenya. All these packaged, Tsavo emerged as famous for the Man eating lions during the construction of the Kenya Uganda railway; being a battle ground for both the British and the German colonies ; while Serengeti – Maasai Mara were re-known wonders of the world. The highest Mountain in Africa – Kilimanjaro besides other attractions including beaches, ecological, heritage sites and bird ringing sites all culminated in one beautiful package that would give a lasting experience for visitors to the region.

Opportunities in Marketing and Stakeholder involvement

Marketing. Other research respondents identified marketing as a crucial opportunity towards attracting a continuous flow of visitors within the expanded market. The East African region was seen to have innumerable attractions ranging from beaches, world class recognized parks and reserves and all these packaged, could give uniqueness to the destination and even attracting high end clientele to these areas including some of the wonders of the world and largest continuous ecosystems like the Maasai Mara in Kenya and Serengeti in Tanzania could form one of the largest continuous tourism circuit with a blend of unique wildlife species e.g. the wildebeest that migrate between the two areas at specific season of the year.(Chen, T. 2022).

Public Private Partnership and the MICE Programmes

Diverse groups of people with interest in the tourist industry are called stakeholders because of the correlation between their tasks. Keeping track of all social and traditional activities and practices carried out by people for example plays a significant role in the growth of domestic tourism. The stakeholders from the public and private sectors work together to carry out the values and principles of business tourism cited as excellent corporate tourism and an emerging example of expanding revenue stream that came in the form of organizing meetings, conferences, seminars, and exhibitions besides other events. In Kenya, the popular tourism attraction is the wildlife and this therefore tells why many visitors get attracted to stay in hotels that are within the National Parks and Reserves. Kenya was said to have tapped on these programmes to generate revenue from most of her protected Areas.

Kenya is also becoming a MICE hub in the region due to her fast internet connectivity and the level of technology. Close proximity to some of tourism ventures especially within the capital city of Nairobi, including the Nairobi National Park and other private entities within a close radius to the city makes it easier for those conference attendees to kill two birds with one stone. Besides these, many other conferences are held within hotels in the National Parks and Reserves hence boosting the MICE programmes as an opportunity to tourism recovery after COVID-19 pandemic.

Covid-19 and Financial Stability. Kenya suffered the same fate with other global states where hundreds of employees lost jobs while tourism facilities were closed down. This scenario led to reduced government tax base as well as impacting on the other tourism multiplier sectors that fed on the tourism sector like transport, agriculture, water and energy sectors among many others. The study established financial decline at about 70% for the period 2019 to 2020 while 2% increase was realized in the year 2021. This was associated with the visitor fluctuation at around 58% decline in the period 2019 to 2021 and a slight rebound of about 3% for the period 2020 to 2021.

A total of 36.8% of the total respondents felt post COVID-19 tourism sector was still sustainable while 45.6% of the total respondents felt it was proving unsustainable in the wake of the frequent occurrences hence the need to look for different opportunities that could stabilize the sector throughout the season.

The Concept of Sustainability in Tourism Post COVID-19

Sustainability was used to refer to the ability of maintaining something at a certain level and in the case of tourism in Kenya, this concept was used to mean the ability of maintaining tourism numbers and accrued benefits at levels and trends realized prior to Covid-19. Tourism proceeds were said to be sources of government funds which are ideally shared with different institutions some of which were said to be non-revenue generating in nature. New opportunities to sustain the sector were therefore identified and deemed essential in ensuring the sector stood the test of various catastrophes that face not only Kenya but the whole world at large.

6. Conclusion

The opportunities for tourism development in Africa and Kenya in particular are immense in spite of the recurrent unforeseen occurrences like pandemics. Concerted efforts by various stakeholders and the new dimensions in tourism business have played a key role in ensuring visitor confidence in Kenyan destination. The upcoming domestic tourism and the spectrum of activities and products is wide that Kenya has decided to tap. The Inter connectivity and interoperability between different states and institutions requires detailed knowledge, information and coordinated efforts to enable present the best in opportunity employable in the region to keep the sector afloat in the midst of occurrences that may act as facilitators to the sector's decline. African states like Kenya are always reminded on the need to embrace African solutions to African problems and hence the need for prioritizing local opportunities towards promotion of resilience and sustainability of the country's tourism sector.

7. Recommendations

- 1) The Kenyan government to employ an integrated tourism policy approaches to promote tourism recovery based on available opportunities; by focusing on coordinated

approaches towards diversification of the tourism opportunities in collaboration with other stakeholders.

- 2) Kenya to ride on the East African Cooperation (EAC) to promote the regional tourism agenda on tourism promotion through regional block marketing. This should be initiated and strengthened through cross-border universal structures to boost demand and uptake.
- 3) The Kenyan tourism industry players to identify the sector's threats and coping strategies and opportunities that should be employed to ensure resilience and sustainability in the sector.

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