TOURISM
RESEARCH
INSTITUTE

THE KENYA DOMESTIC TOURISM SURVEY

May 2021

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ACRONYMS AND ABBREVIATIONS

APTA:	Association of Promotion of Tourism to Africa
ATTA:	African Travel and Tourism Association
GoK:	Government of Kenya
ITB:	Internationale Tourism-us-Börse
KAHC:	Kenya Hotel keepers and Caterers
KATA:	Kenya Association of Travel Agents
KATO:	Kenya Association of Tour Operators
KTB:	Kenya Tourism Board
KWS:	Kenya Wildlife Service
MKTE:	Magical Kenya Travel Expo
MoTW:	Ministry of Tourism and Wildlife
OECD:	The Organisation for Economic Co-operation and Development
SATOA:	South African Tour Operators Association
SGR:	Standard Gauge Railway
TF:	Tourism Finance
TFC:	Tourism Finance Corporation
TRA:	Tourism Regulatory Authority
TRI:	Tourism Research Institute

EXECUTIVE SUMMARY

The main purpose of this survey was to gauge the extent of domestic tourism in Kenya and obtain information on the experiences of domestic leisure tourists in the country and their needs going forward. The survey specifically sought to capture the demographics of domestic tourists and their travel experiences before and during Covid-19; obtain the demographics of the Kenyans who do not travel and their reasons for not travelling; understand the extent and impact of domestic tourism activities pre Covid-19 and during Covid-19; gauge the awareness and the impact of The Tourism and Travel Safety and Health Protocols; Understand the motivation and the future growth prospects for domestic tourism and evaluate the experiences of domestic tourists in Kenya with a view to inform policy makers, attractions managers and service providers on areas of improvement.

The study was a countrywide domestic tourism survey that took place in the months of October and November 2020. The survey was administered digitally whereby posters were placed in various attractions for Kenyans to scan a QR code or download a link to participate. The information was deposited on a real time basis into a database for analysis and report writing. Upon completion of the online data collection, data analysis was undertaken and the report prepared.

The key findings of the survey are summarized below.

1. Demographics of domestic tourists and their travel experiences before and during Covid-19

The demographics of domestic tourists' before and during Covid-19 showed that a greater percentage of the respondents were those who had travelled (63.9%) in the given period compared to those who did not travel (36.4%); Majority of the respondents were male (62.4%). Most (37.4%) fell under the age bracket of 26 and 35 years. The study showed that the number of females who indicated that they travelled during Covid-19 increased compared to the pre Covid-19 period as opposed to the number of male travellers that decreased during Covid-19 compared to pre Covid-19 period; Majority hailed from Nairobi followed by Mombasa (51.0% and 12.3% respectively); Majority (50.3%) of the respondents earned 50,000KES and below per month. Both before and during the Covid-19 periods, the most popular modes of travel were private cars (42.4%) followed by public road transport and airplanes both at 14.2%; and that most of the travellers in both periods were holders of a university degree (43.0%) and 44.1% respectively).

2. Demographics of the Kenyans who did not travel and their reasons for not travelling

The survey found out that majority of those who did not travel during Covid had the following demographic characteristics: Were mainly residents of Nairobi (50.5%) with Mombasa coming at a distant second (14.3%); More females than males travelled locally; Were aged between 26-35 years (36%) followed by 36-50 years (26%) and closely followed by the ages of 19-25 years (24%); Were mainly holders of undergraduate degrees (35.4%) followed by diploma holders (25.4%); Were earners of KES 50,000 and below (64.6%) followed by those with incomes ranging between KES 50,001- KES100,000 at 13.5%.

On the reasons for not traveling, the study found out some key reasons for not travelling among Kenya's domestic tourists were

1. Covid-19 pandemic (34%);
2. Cost of travel (23.7%);

3. Time constraints (16.7%);

4. No planned travel (10%);

5. lack of information (5.4%)

3. The Extent and Impact of Domestic Tourism Activities before and during Covid-19:

A number of changes to domestic travel arrangements and activities were noted during the Covid 19 period. The Overall leading trip expenses both before and during Covid were accommodation, transport and food and drinks in this order. In addition, compared to the pre-Covid period, expenditure on all travel components went down during Covid 19 except for park fees that went up by 8%. The average number of nights spent by domestic travellers dropped from 4 nights before Covid-19 to 2 nights during Covid-19. In both seasons, majority of travellers were accompanied by family (29% and 27% respectively) followed by those travelling in groups (20% and 23% respectively). Virtually all other forms of travel arrangements recorded a decline during Covid, group travel increased, rising from 20% before Covid to 23% during Covid. Similar results were noted for those who travelled with friends. In both the pre- and during Covid times, hotel accommodation remained the most preferred by domestic tourists (45% and 36% respectively). Preference for staying with friends and relatives, resorts, game lodges and Airbnb increased during the Covid period indicating a preference for staying in less populated places or with trusted persons in terms of health status. In terms of popularity of visitor attraction sites, the survey found out that nature-based attractions remain the most attractive to domestic visitors both before and during Covid. Indeed, in both seasons, game viewing and visiting beaches remained the top popular activities for domestic tourists

4. Awareness and the effect of the tourism and travel safety and health protocols.

The study found out that during the study period, a slight majority (43.5%) of the respondents were aware of the tourism and travel health protocols, 39.4% were not aware while 17.1% did not respond to this questions. In addition, more males (46%) had knowledge of health and travel protocols than female respondents (22%). Majority (34%) of those who had knowledge to the health and safety protocols were aged between 35-50 years. On the question of adherence to the travel health and safety protocols, the study found out that domestic tourists were mainly aware and largely adhered to Kenya`s tourism and travel health and safety protocols.

5. Motivation and the future growth prospects for domestic tourism.

The survey found out that domestic travel during Covid-19 period was mainly motivated by: Planned travel (46.4%); an opportunity presented by minimal crowds (31.2%); and sufficient health protocols (30.2%). Other reasons included the availability of discounts, work related travel, and cabin fever

6. On the experiences of domestic tourists in Kenya,

This study found out that both pre- and during Covid, majority of domestic tourists in Kenya rated their experiences with services offered by the tourism industry as either 'poor' or 'good' (in that order). This finding was similar to that of those who travelled both pre-and during covid, albeit with slight differences noted with experiences on different products. Further differences were also noted across the different demographics. For instance, in contrast to the other products where the percentage of those rating them as 'very poor' decreased during Covid, for accommodation and restaurants service, this percentage increased during Covid. The ratings were relatively higher for males across all scales of measurement with very poor leading followed by poor then good in both pre Covid-19 and during Covid-19 periods. In addition, combining 'Poor' and 'very poor' ratings, more women than men rated services offered to domestic tourists as having deteriorated during Covid compared to before. In fact, the number of male respondents that rated the services as being 'poor' pre-Covid decreased during Covid. This demonstrates a difference in quality expectation between male and female domestic tourists with the latter being more sensitive to any change in quality. Further, perceived value for money was high both before and during Covid-19 (94.4% and 94.6% respectively). It is nonetheless important to note that although the findings of this study gives an indication on what the experience of the domestic tourist market was before and during Covid, there is need to further probe into what informed the different experience ratings.

7. Challenges the facing domestic tourism in Kenya.

The study sought to find out what the domestic market perceived as challenges facing Kenya's domestic tourism. The following challenges were identified as facing domestic tourism in Kenya; The high cost of holiday including transportation, accommodation, food & beverage; Poor state and management of the facilities leading to lower satisfaction levels; Lack of targeted marketing which has led to many market segments being left out of the tourism map; Inadequate support from some of suppliers to the travellers in enabling them have full experiences at the destinations e.g. lack of guides; Inadequate hygiene and safety protocols in lower end establishments; Lack of or limited publicity to some the attractions and destinations among the travellers; Lack of or poor knowledge among the locals on receiving guests and hosting them and; Lack of publicity on cuisines and cultures.

In conclusion, while acknowledging that domestic tourism is unlikely to replace international tourism, this market segment could serve as a contingency strategy for sustaining the entire tourism sector particularly during crises periods. In view of this fact, destinations around the world are developing and implementing several initiatives targeted at promoting domestic travel and restoring confidence in the tourism sector during the covid-19 pandemic. This study thus makes recommendations for improvement of Kenya's domestic tourism based on best practices. These include

- Implementation of measures to improve affordability of Kenya's tourism to a broader share of the local population.
- Improvement of the quality of tourism services and facilities
- Improved access to tourism attractions and destinations
- Focus and diversify the tourism product offering for the domestic market
- Enhancing marketing and promotion of Kenya's tourism products, services and facilities
- Forging of greater partnerships in promoting domestic tourism
- Boosting the sector's capacity for product development and service delivery to the domestic market.

An elaborate action plan on implementing the above recommendations is provided identifying the goal, key actions, key actors and priority status of each action point.

1

SECTION 1
BACKGROUND

SECTION 1 BACKGROUND

1.1 Introduction

Prior to the outbreak of the Covid-19 pandemic, the global travel and tourism industry had experienced sustained growth for a record of six decades. The 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). Figure 1.1 represents the trajectory of international tourist arrivals since the year 2000.

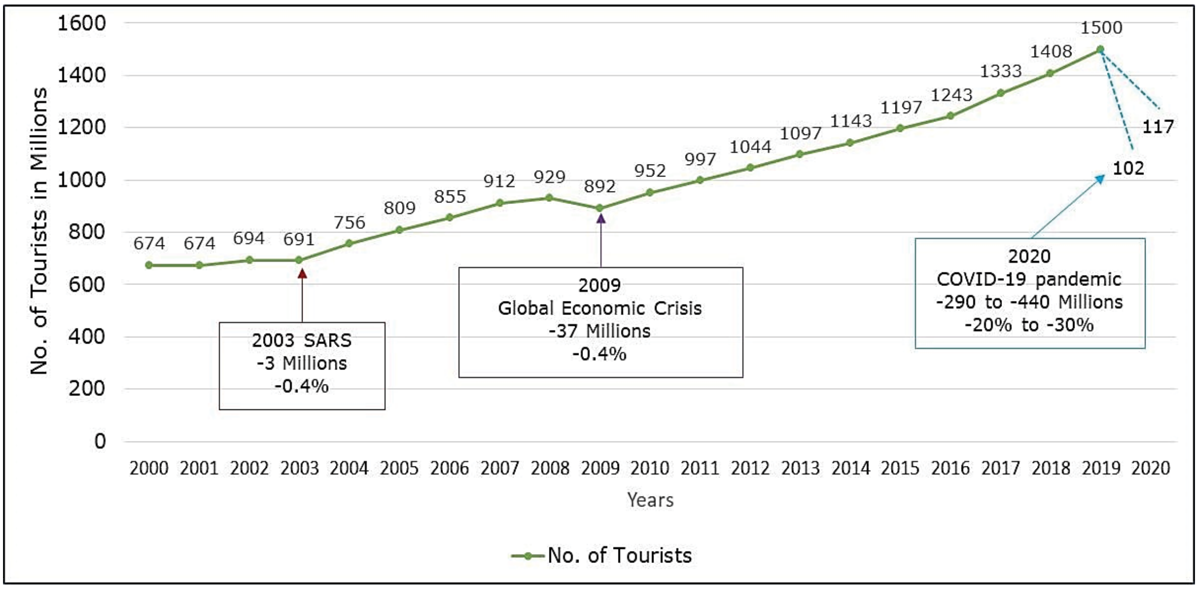

Figure 1.2: The Impact of Covid-19 on Global Tourism (Source: UNWTO, December, 2020)

A global survey conducted by UNWTO on the impact of Covid-19 on tourism and the expected time of recovery foresees a rebound in international tourism in 2021, particularly by the third quarter of 2021, while around 20% expects it to occur only in 2022.

The changing visitor behaviour

In the face of the pandemic, a number of travel behavioural changes are expected. Recent surveys revealed that there is still willingness to travel after the pandemic. However, when choosing the holiday destination, low tourist density and sanitary conditions are the main attributes a destination needs to have. In avoiding overcrowded places, tourists show preferences for destinations with outdoor activities and contact with the nature and away from big cities (DNA, 2020; Interface Tourism, 2020c; Gursoy et al., 2020), VVF, 2020). Interestingly, price doesn't seem to be the main criterion affecting the selection of the destination. In terms of geographical consideration, research shows greater preference to national destinations although there is still a willingness to travel outside the home country for holidays (EY, 2020b; DNA, 2020; Interface Tourism, 2020c).

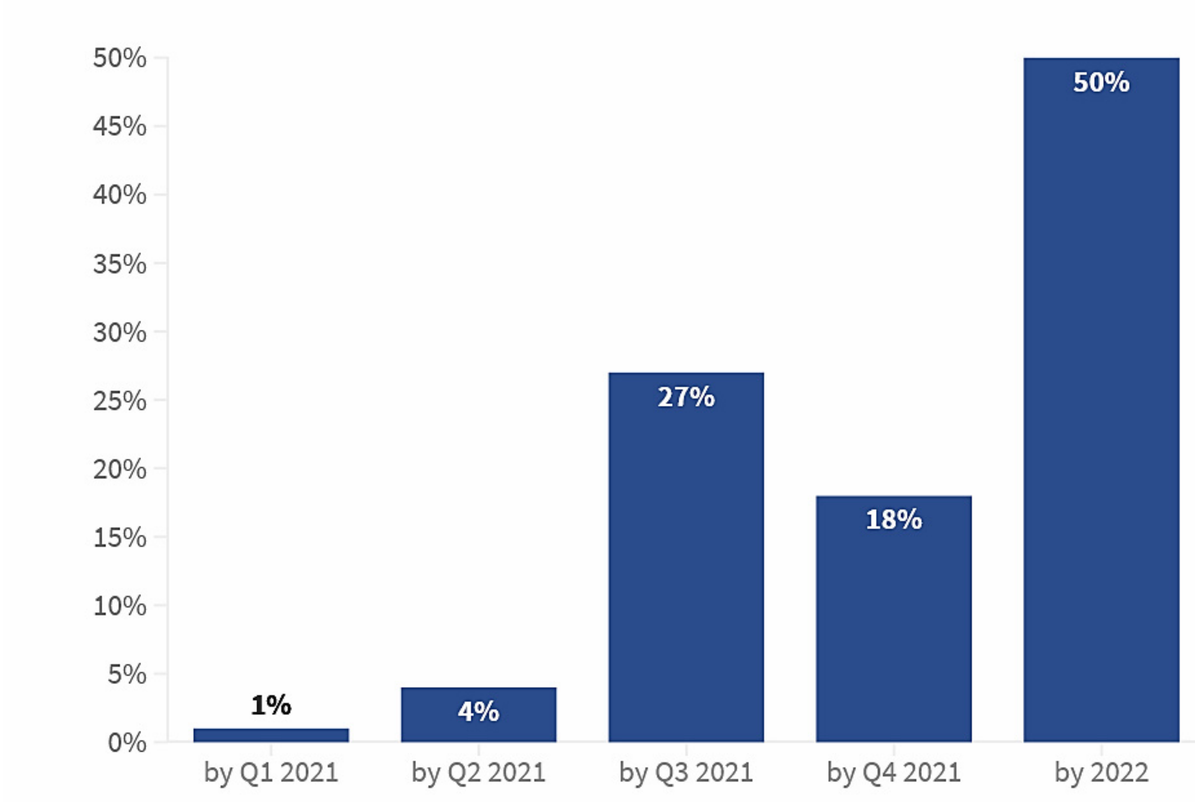

Figure 1.3: The impact of Covid-19 on tourism and the expected time of recovery (Source: UNWTO 2021)

Outside the home country, there is a higher preference for destinations less affected by Covid-19 (HES-SO, 2020; Interface Tourism, 2020c). Changes in the duration of trips are also expected, preferably by making them shorter or with the same duration but divided into several small trips. Household budgets allocated to holidays are also likely to be lower (Azurite Consulting 2020; Interface Tourism, 2020a and 2020c; Roland Berger, 2020), due to uncertainty and economic instability.

1.2 Domestic tourism as the panacea to sustaining the industry

Towards recovering the tourism industry, countries around the world are implementing a wide range of measures to mitigate the impact of the Covid-19 outbreak and to stimulate the recovery of the travel and tourism sector. Industry analysts and experts around the world are of the view that domestic demand would recover faster than international demand. Indeed, domestic tourism is being touted as helping to soften the impact.

Over the decades, domestic Tourism has been noted as the main driving force of the Travel and Tourism sector in major economies globally, accounting for 73% in 2017 and 71.2% in 2018. A UN World Tourism Organization on Understanding Domestic Tourism and Seizing its Opportunities conducted in September 2020 presents important realities about domestic tourism at a global level and reveals that an estimated 9 billion domestic tourist trips (overnight visitors) were recorded around the world in 2018, which is well over 50% in Asia and the Pacific. Worldwide, domestic tourism is over six times bigger than international tourism (1.4 billion international arrivals in 2018) measured in number of tourist trips.

According to the report as shown in Table 1.1, the world's largest domestic tourism markets in terms of tourist trips are India, China and the United States of America, mostly a result of their large population and geographical size. Other large domestic tourism markets include Japan, Brazil, France and Spain. The highest ratio of tourist trips to population can be found in the United States with 5 domestic trips per capita in 2018. Among the larger markets Australia, Spain, the Republic of Korea and France all recorded 3 to 4 domestic trips per capita.

Table 1.1: World's major domestic tourism markets, 2018

	Tourist trips (arrivals)		Domestic Visitor trips	Domestic visitors at Hotels		Population	Domestic tourism trips per capita
	Domestic	Inbound		Guests	Nights		
	(million)	(million)	(million)	(million)	(million)	(million)	(million)
India	1,855	17.4	..	..	..	1,334	1.4
China	..	62.9	5,539	..	..	1,395	..
United States	1,659	79.7	2,291	..	..	327	5.1
Japan	291	31.2	561.8	317	406	126	2.3
Brazil[1]	191	5.4	..	..	..	197	1.0
France	190	89.4	268	82	135	65	2.9
Spain	170	82.8	455	51	117	46	3.7
Russian Federation	..	24.6	..	48	136	146	..
Republic of Korea	163	15.3	311	24	26	52	3.2
Germany	159	38.9	..	114	235	83	1.9
Indonesia	..	13.4	303	73	..	264	..
Thailand	131	38.2	228	107	..	68	1.9
United Kingdom	119	36.3	1,822	42	91	66	1.8
Australia	106	9.2	312	37	101	25	4.2
Malaysia	102	25.8	302	52	..	32	3.1
Mexico	100	41.3	..	62	109	125	0.8

Source: UNWTO and IMF (Sept. 2020)

The report further reveals that,

- The largest domestic tourism markets in terms of expenditure among OECD countries are the United States (USD 1 trillion), Germany (USD 249 billion), Japan (USD 201 billion), the United Kingdom (USD 154 billion) and Mexico (USD 139 billion). Tourists from the United States spent more than four times the earnings generated by inbound travel to the United States and Japanese tourists six times more.
- In OECD countries, spending on domestic tourism is three times the amount generated from inbound tourism spending, in US dollar terms.
- Relative to population, Iceland and the Netherlands spend the most on domestic tourism in US dollar terms (both about USD 3,600 per capita), followed by Australia and Germany (above USD 3,000).

1.3. Kenya's tourism industry in the face of Covid-19: The place of domestic tourism

Just as in the global scene, the tourism sector has experienced impressive and sustained growth since 2015 reaching an all-time high of 2.05 million international tourist arrivals in 2019 (Figure. 1.4)

With the outbreak of Covid-19 occasioning travel restrictions and cancellation of flights worldwide among other containment measures, Kenya's travel and tourism industry has experienced challenges unknown in the recent history.

As the country seeks ways for at least stabilizing the industry, there has been consensus that the recovery of Kenya's tourism during-Covid would be supported by the domestic market. The market segment has been key to Kenya's tourism for some time now. Between 2015 and 2018, domestic tourism accounted for more than 50% of the total Bed Occupancy. Further, between the period of 2014 to 2018, the number of domestic tourists' bed-nights increased from 2,948,000 to 4,559,000.

Of key importance to note, domestic tourism has sustained the industry (especially tourist accommodation) during major disasters such as the 2002 Kikambala bombings, Kenya's post-election violence of 2007, September 2013 West Gate Mall terrorist attack and its aftermaths, 2015 El Nino flooding, the global

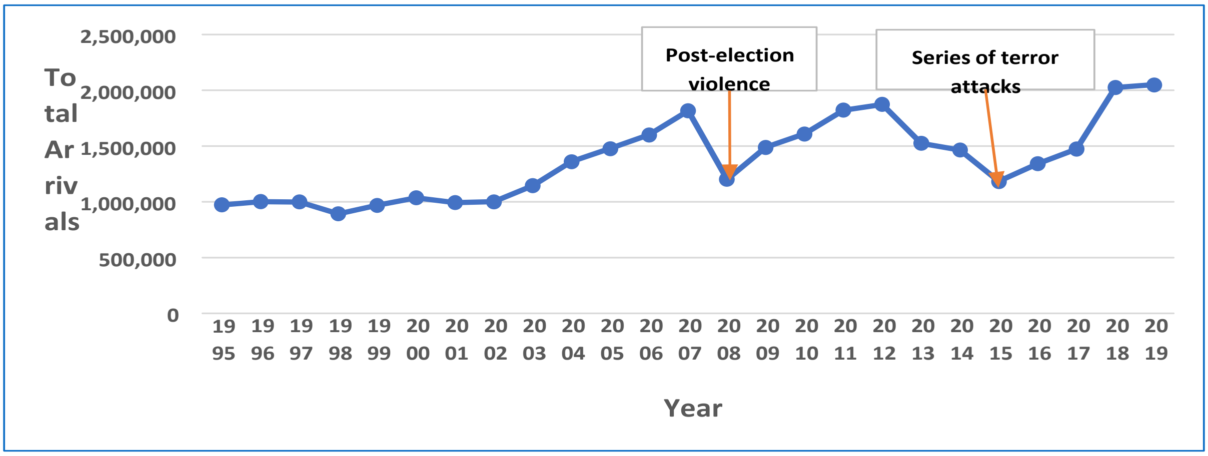

Figure 1.4 International tourist arrivals in Kenya between 1995-2019 (MoTW. 2020)

economic downturns in key source markets and the disaster of Ebola in the West African countries from March 2014 to 2015 (Kwoba, 2018). Box 1 provides a synopsis of opportunities and challenges of Kenya's domestic tourism extracted from the 2018 'Integrated Household Budget Survey' by the Kenya National Bureau of Statistics (KNBS).

Box 1: A synopsis of opportunities and challenges of Kenya's domestic tourism

Between the period 2015/2016, 13.4 per cent of the Kenyan population travelled locally. Majority (42.7%) of these travellers were in the 18-35 years' age bracket with 47.9% of urban dwellers travelling compared to 35.1% in rural areas. Specifically, the study found out that majority of the domestic travellers were from Nairobi.

The survey further shows that among those who travelled, 79.8% took one trip. This pattern was replicated in the urban and rural areas and across all age groups. Majority (57.5%) of those who travelled in the rural areas were visiting friends and relatives. Furthermore, more days were spent away by residents in rural areas while visiting their second residence. Those who travelled for social gatherings, and study/professional activities were 12.6% and 6.3%, respectively. Majority (71.3%) of those who travelled in urban areas were visiting friends and relatives.

On average, the younger age groups took longer days for study visits while those aged 16 years and above spent more days on business or professional activities. Nationally, most of the trips were self-sponsored (66.4%). The same scenario was replicated in urban and rural areas. Young people aged 0-17 years who travelled were funded mainly by other sponsors while 20.5 per cent sponsored themselves. Most travellers sponsored themselves except for those in the 0-17 years' age group.

Transport accounted for the largest share (38.4%) of the expenditure on domestic tourism, followed by shopping for personal use (12.9%) and gifts or presents (11.5%).

Majority of the population did not take a trip due to cost limitations. Almost a third of the population in urban areas cited time constraints and affordability as reasons for not taking a trip. The limitation among the population in rural areas was mainly affordability and being in school. Analysis by age groups shows that 42.6 per cent in the 0-17 years' age group did not travel because they were in school. The main reason cited for not taking a trip by the population in the 18-35 and 65 and above age groups was affordability, while those in the 36-64 age group cited the time constraint.

Source: 'Integrated Household Budget Survey' (KNBS, 2018)

This evidence gives credence to the noted potential that the market segment represents to the recovery of Kenya's tourism industry. The report by the National Tourism Risk and Crisis Management Committee (2020) acknowledges this fact and cites domestic tourism as one of the pathways to sustain and spur recovery of Kenya's tourism industry.

It is with this recognition that the current study seeks to understand domestic tourist behaviour pre- and during Covid-19 with an aim of exploring better adaptation of the tourism sector to leverage on the domestic tourism market.

2

SECTION 2:
KENYA’S DOMESTIC TOURISM SURVEY, 2021

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2.1 TRI Mandate and Rationale for Undertaking the Current study

Tourism Research Institute is mandated to undertake and co-ordinate tourism research and analysis in the country. One of TRI's mandate is to undertake consumer satisfaction surveys. These surveys are meant to inform the various players in the sector to improve on the tourist experience including:

i. The government on the improvements required in infrastructure to access the attraction areas and other concerns like security, environmental concerns among others

ii. Tourist service providers to improve in service provision so as to meet the dynamic needs of visitors and be globally competitive

iii. Marketing agencies (KTB) and others playing that role to be able to tailor their marketing message with the changing typology of the tourist

iv. Potential investors to determine the type of facilities and services required as the tourists' tastes and preferences are dynamic

v. Training institutions to determine the new skill sets, competencies and attitudes to impart in the service provision staff.

2.2 Rationale for the study

The Medium Term Plan III 2018-2022 (MTP III) targets an increase of domestic bed-nights to 6.5m by 2022. For the sector to achieve this target the government and the private sector need to make an elaborate effort to improve on the products and the overall experience for domestic tourists.

This study therefore focuses on the experience of domestic leisure tourists with a purpose of improving their experiences. The importance and timeliness of the study is also underscored by current Covid-19 pandemic and the unprecedented devastating effects it has had on the tourism sector globally and specifically in Kenya. As a long-haul destination that is highly dependent on the Western market, it will take long for international tourism to recover in Kenya. There is consensus that the recovery of Kenya's tourism expects to be supported a lot by the domestic market. It is also an opportunity to position the domestic market as a key component of the country's tourism business and the various players hence the need to tailor their services to address this. The study will therefore focus on gauging domestic tourist activities and experiences before and during Covid-19 for a more in-depth understanding of its potential for growth issues that need improvement.

2.3. Study Objectives, Design and Methodology

In the months of October and December 2020, the Tourism Research Institute undertook a countrywide domestic tourism survey. The main purpose of this survey was to gauge the extent of domestic tourism in

Kenya and obtain information on the experiences of domestic leisure tourists in the country and their needs going forward. The survey specifically sought to;

i. Capture the demographics of domestic tourists and their travel experiences before and during Covid-19.

ii. Obtain the demographics of the Kenyans who do not travel and their reasons for not travelling.

iii. Understand the extent and impact of domestic tourism activities before and during Covid-19.

iv. Gauge awareness of and the effect of The Tourism and Travel Safety and Health Protocols.

v. Understand the motivations for and the future growth prospects for domestic tourism.

vi. Evaluate the experiences of domestic tourists in Kenya with a view to inform policy makers, attractions managers and service providers on areas of improvement.

2.3.1 Methodology

This country-wide domestic tourism survey was conducted in the months of October and November 2020. Data collection was undertaken using semi-structured questionnaires. The survey was administered digitally whereby posters were placed in various attractions for Kenyans to scan a QR code or download a link to participate. The information was deposited on a real time basis into a database for analysis and report writing. Upon completion of the online data collection, data was cleaned and fed into SPSS version 20 for analysed and report writing. The following are details of the specific data analysis procedures used

A) Data cleaning

This process was undertaken before data analysis and involvedidentifying incomplete, incorrect, inaccurate or irrelevant parts of the data and then replacing, modifying, or deleting the coarse data.

B) Thematic data analysis

Thematic data analysis was utilized to analyze qualitative data obtained through unstructured questions. Through an inductive approach-emergent themes and supporting categories were generated based on patterns from the collected data. These themes and categories were then analyzed and interpreted first independently and secondly, coded and entered into existing data spreadsheets for purposes of correlation with quantitative variables.

C) Statistical data analysis

Statistical data analysis was used on the quantitative data. Descriptive statistics was used tosummarize and describe data. Specifically, the analysis utilized measures of central tendencyincluding means and percentages. Cross tabulations were used to analyze the relationship between major data outputs and key demographic variables. Groups of data were summarized using a combination of tabulated descriptions (i.e., tables), graphical description (i.e., graphs and charts) and statistical commentary (i.e., a discussion of the results).

3

SECTION 3
STUDY FINDINGS

SECTION 3
STUDY FINDINGS

3.1. Introduction

In line with the main purpose of this survey-to gauge the extent of domestic tourism in Kenya and obtain information on the experiences of domestic leisure tourists in the country and their needs going forward, the study findings are presented based on the objectives.

3.2. Respondents' demographic characteristics

A total of 1480 respondents participated in the online survey during the period October and December 2020. The majority of the respondents were male 923 (62.4%) while female were 544 (36.8%), this is shown on Figure 3.1

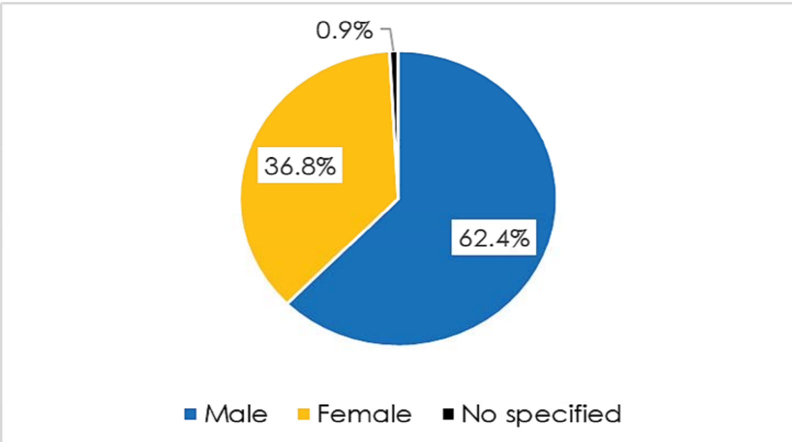

Figure 3.1: Gender of the respondents

Age distribution

Among the respondents, the majority (37.4%) were from the 26-35 age group followed by 36-50 (32.0%), 19-25 (17.8%), 51-60 (8.0%), Over 60 (2.2%), Under 19 (2.4%). Figure 3.2 shows the age distribution.

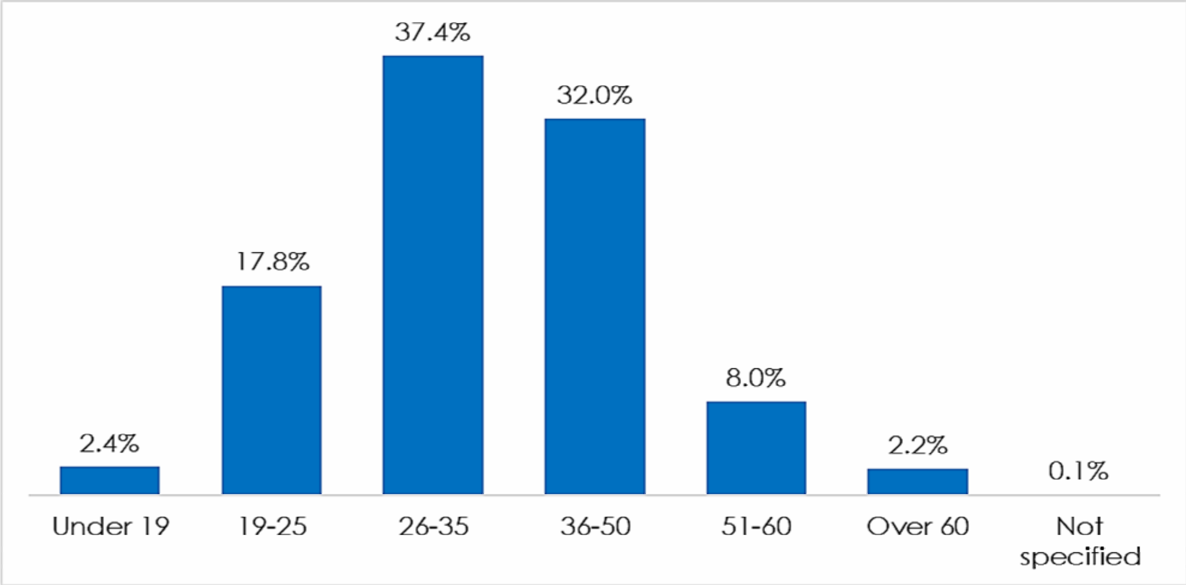

Figure 3.2: Age distribution of the respondents

Respondents' Level of Education

Majority of the respondents had a University Degree (40.6%) followed by Masters (22.0%), Diploma (20.6%), High School (11.7%), Ph. D (2.8%), Less High School (1.4%) while (0.9%) of the respondents did not specify their level of education. This shows that majority of the respondents were fairly educated and knowledgeable (Figure 3.3).

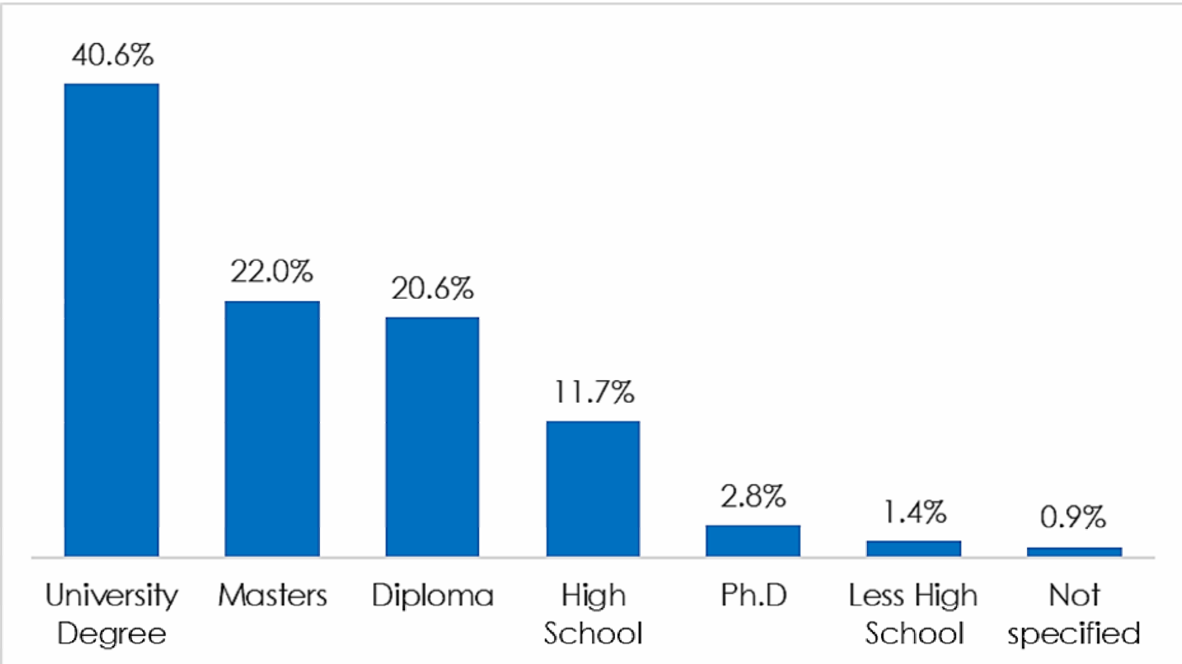

Figure 3.3: Level of education

Respondents' Income Levels

Majority of respondents (50.3%) earned below 50,000KES per month. The second most common income bracket was KES. 50,001 - 100,000 with 16.8% indicating they earned monthly incomes within this bracket (Table 3.1).

Table 3.1: Income level

Income level	No of respondents	Proportion
50,000 and below	752	50.3%
50,001 - 100,000	248	16.8%
Over 250,000	180	12.2%
150,001 - 250,000	169	11.4%
100,001 - 150,000	127	8.6%
Not specified	4	0.3%
Total	1480	100.0%

Respondents travelling status

A large majority of the respondents (63.6%) indicated that they had taken a tourism-related trip during the period under review (last 10 months) with 36.4% indicating that they had not taken a trip (Figure 3.4).

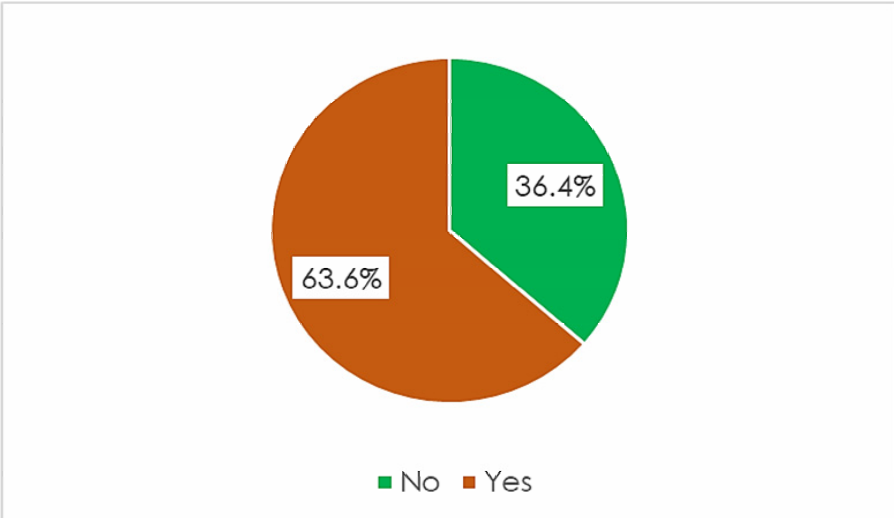

Figure 3.4: Respondents travelling status within the last 10 months

Of the 941 respondents who travelled, 519 (55.2%) travelled pre Covid-19, 295 (31.3%) travelled During Covid-19 while 127 (13.5%) travelled pre and during Covid-19 (Figure 3.5).

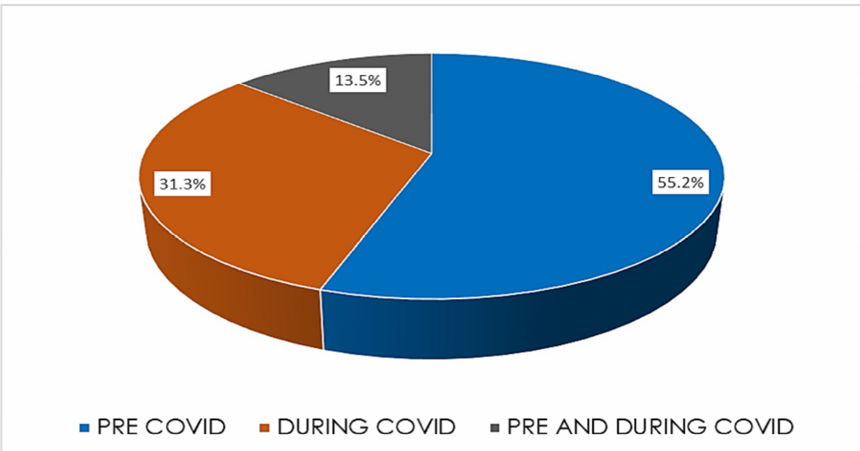

Figure 3.5: Respondents travel period

Counties of Residence

A tabulation of counties of residence shows that the majority of the respondents resided in Nairobi followed by Mombasa, Kiambu, Kisumu, Nakuru and Kajiado in that order (Table 3.2).

Table 3. 2: Top counties of residence for the respondents

County	No. of respondents	Proportion
Nairobi	753	51.0%
Mombasa	182	12.3%
Kiambu	93	6.3%
Kisumu	41	2.8%
Nakuru	39	2.6%
Kajiado	39	2.6%
Machakos	35	2.4%
Kilifi	34	2.3%
Narok	21	1.4%
Taita Taveta	19	1.3%
Uasin Gishu	18	1.2%
Busia	18	1.2%
Makueni	17	1.2%
Meru	16	1.1%
Total	1325	89.5%

Others with below 1% of the total respondents (total 151 respondents): Laikipia, Kwale, Bungoma, Homa Bay, Nyeri, Siaya, Nandi, Murang'a, Lamu, Kisii, Tharaka-Nithi, Tana River, Bomet, Samburu, Embu, Migori, Turkana, Nyamira, Isiolo, Nyandarua, Marsabit, Baringo, West Pokot, Wajir, Kakamega, Garissa, Kericho, Kitui, Elgeyo-MaraKwet, Vihiga, and Trans-Nzoia

These findings are in line with those of a domestic survey on Integrated Household Budget in Kenya- KNBS (2018) which shows more urban (47.9%) residents travelled compared to their rural (35.15) counter-parts. Most of the travellers in absolute numbers resided in Nairobi City followed by Mombasa.

Mode of Travel

The study found out that the majority of respondents who travelled in the three categories (i.e. pre- Covid-19, During Covid-19 and both Pre and During Covid-19 seasons) used private cars. Table 3.3 summarizes the modes of travel used by the respondents.

Table 3.3. Mode of travel used by the respondents who travel pre Covid-19, during Covid-19 periods and pre & during Covid-19 combined

Mode of travel	PRE Covid-19	DURING Covid-19
Private Car	37.2%	41.4%
Tour Vehicle	15.6%	14.6%
Public Road Transport	16.0%	13.6%
Airplane	12.3%	13.9%
Train	13.3%	11.5%
Taxi	3.3%	3.4%
Not specified	1.0%	1.0%
School/college bus	0.6%	0.3%
Motorbike	0.4%	0.0%
Boat	0.0%	0.3%
Bicycle	0.2%	0.0%
Walking	0.2%	0.0%

Comparison between pre- and during Covid-19 showed that usage of private cars, flights and taxis increased during Covid-19 period. This demonstrates preference of modes considered less congested, a reason that could also explain decreased use of public road transport. The rest of the modes recorded a declined usage by the respondents. This can be attributed to the Ministry of Health protocols that saw travel using the Standard gauge railway (SGR) suspended resulting in the bookings drop to zero in May and June 2020.

3. 3 Demographics of domestic tourists and their travel experiences pre Covid-19 and during Covid-19

The first objective of the study was to capture the demographics of domestic tourists and their travel experiences both pre Covid-19 and during Covid-19. Findings are presented below.

3.3.1 Demographic characteristics of domestic tourists

a) Gender profile

In both pre- and during Covid-19, the majority of those who travelled were males (70.7% and 56.6% respectively). However, a significant increase in the number of females that travelled during Covid-19 rising from 28.3% pre-Covid to 43.4%. On the other hand, the percentage of male travellers decreased during covid-19, from 70.7% pre-Covid to 56.6% during Covid-19. This seems to confound the established empirical evidence that women are more risk averse than men in matters of decision making[1]. The finding however, is in line with that by Morgenroth, Ryan, and Genat (2017) who conclude that 'women can be just as risk-taking as men -- or even more so -- when the conventional macho measures of daring -- such as betting vast sums on a football game -- are replaced by less stereotypical criteria (Figure 3.6).

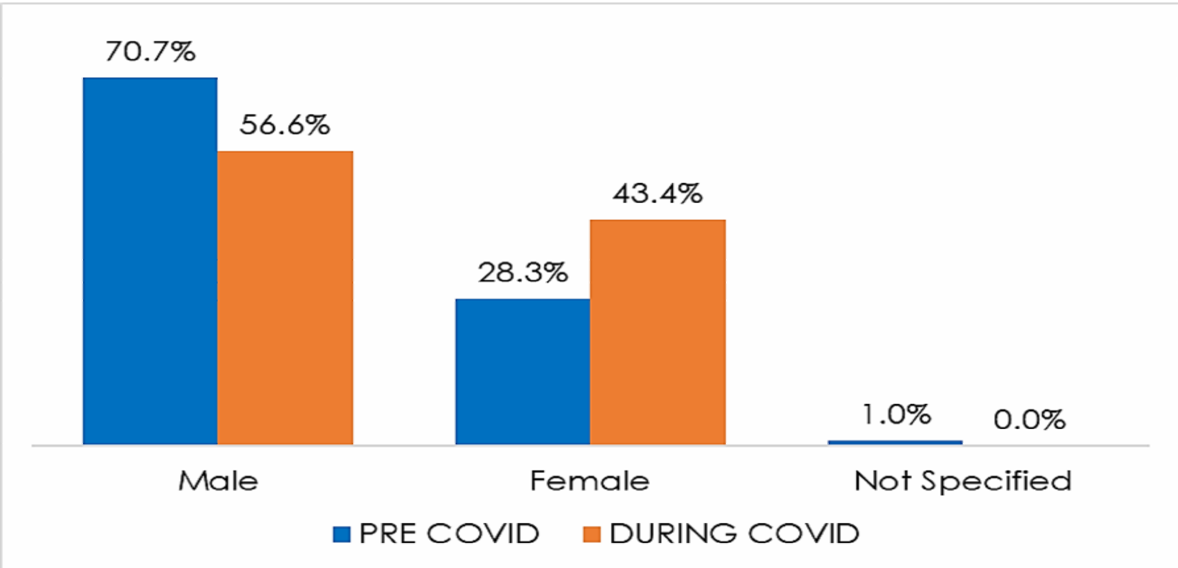

Figure 3.6: The Gender profiles of domestic tourists

b) Age Profile

Overall, the two age brackets between 26 and 50 years (26 to 35 & 36-50) formed the majority of those who took a domestic travel both pre and during Covid-19 with those aged between 26 and 35 forming a slight majority, similar to the findings of the KNBS Integrated Household Budget Survey, (KNBS 2018) that noted majority (42.7%) of domestic travellers were in the 18-35-year age group. Of interest to note, travel among younger ages of 26- 35 decreased during Covid-19 while those of the older ages of 36 and above recorded an increase during Covid-19. This difference could be attributed to means of travel particularly, access to private cars and ability to afford flights, the two modes which became more popular means of travel during this period (Figure 3.7).

[1] Byrnes, Miller and Schafer (1999), Powell and Ansic (1997), Jing Chen (n.d).

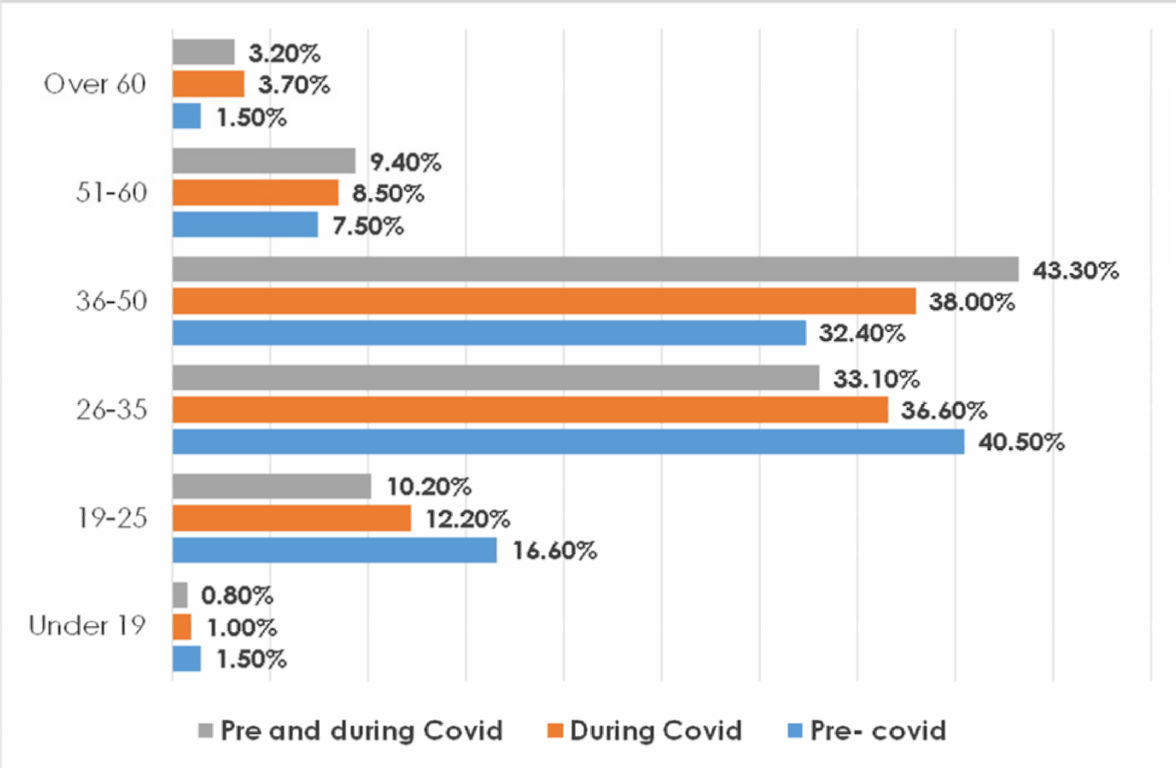

Figure 3.7: Age Profile of domestic travellers

c) Education Level

During both pre and during Covid-19, those with a university degree formed the majority of travellers (43.0% and 44.1% respectively) followed by those with Master degrees and diploma holders. The least were those with less than high school level of education. Indeed, travel among those with University level education (Bachelors, Masters and PhDs) increased during Covid-19 in contrast to those without University education whose travel declined during the Covid-19 period (Figure3.8).

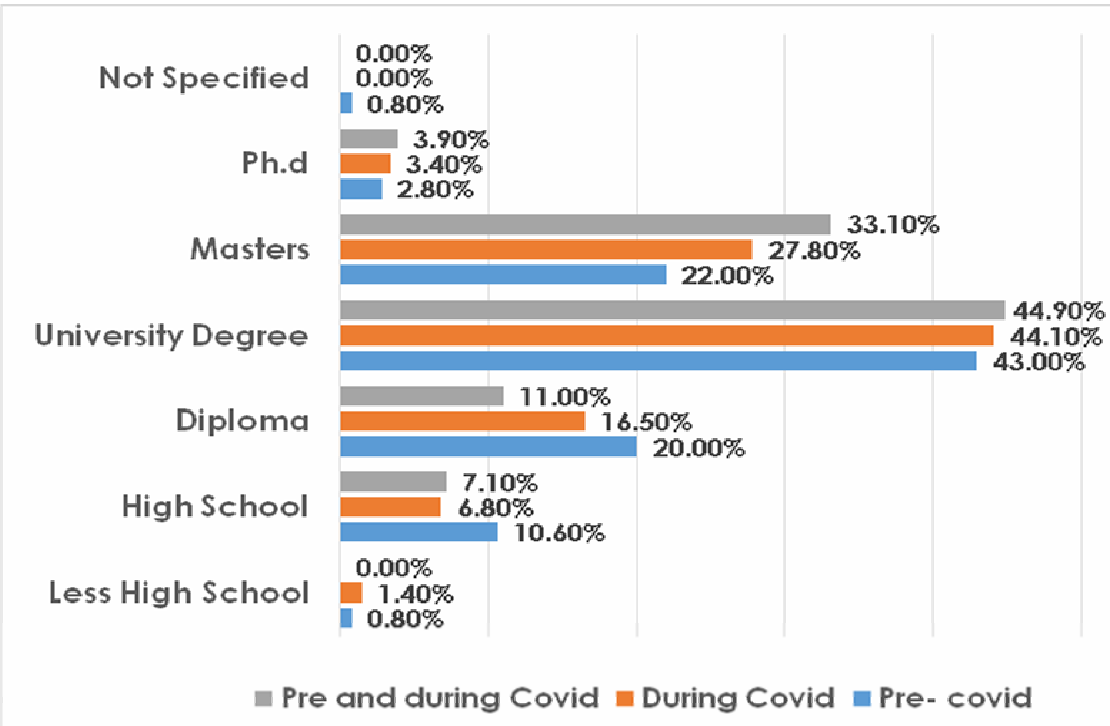

Figure 3.8: Education level

d) Income Level

The Majority of those who travelled pre and during Covid-19 and even those who travelled in both periods earned a monthly income of below KES. 50,000 (47%, 39.3% and 34.6% respectively). This group was followed at a distance by those with a monthly income of between KES 50,001 to KES. 100,000 (figure 3.11). Travelling by this income bracket declined during Covid-19 from 47% to 39.3%. On the contrary, travel during Covid-19 increased for all the rest of income brackets.

This difference could be attributed to the possession of the two most crucial determinants of domestic tourism, disposable income and mobility. The bracket earned between KES 50,001 to KES. 100,000 are more likely to have had their incomes adversely affected by the pandemic besides the possible concerns of economic uncertainty thus, rendering travel not a priority. Those with higher incomes are more likely to have access to private cars and can afford flights, the two modes of travel that were popular during Covid-19 (Figure 3.9).

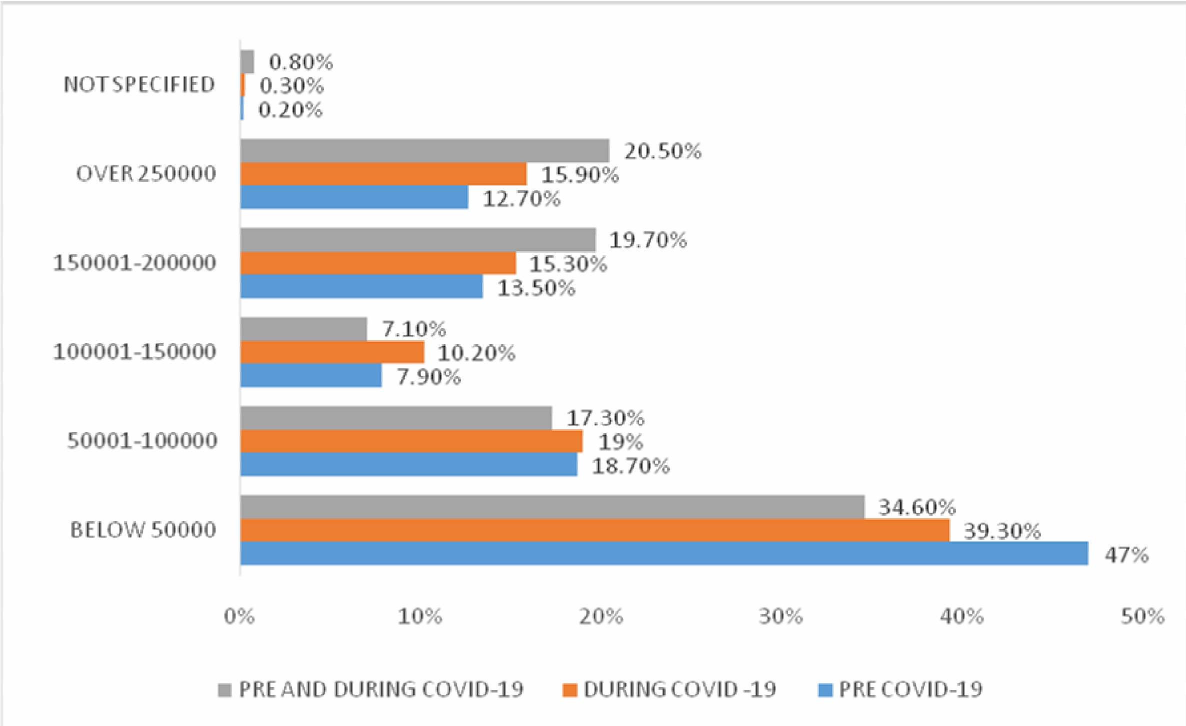

Figure 3.9: Gross Monthly Income level

e) Months of Travel

During Pre Covid-19, more tourists travelled in the months of December 2019 (26%), followed by February 2020 (24.4%), March 2020 (20.5%) and January. The months least travelled pre Covid-19 were May to November with a slight increase in August. During Covid-19 domestic travel was at its slowest between January and March, gradually growing between April and July from when it experienced exponential growth to peak in the month of October (41.7%) (Figure 3.10).

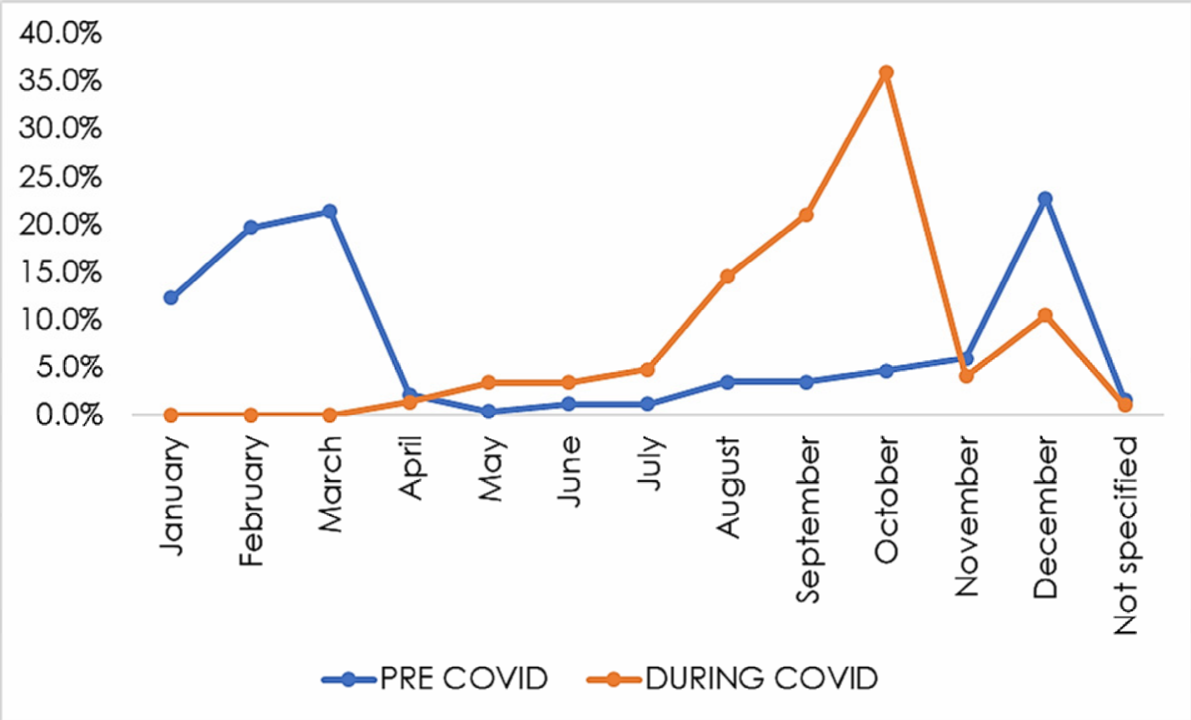

Figure 3.10: Month of travel pre and during Covid

f) Months of Travel pre-Covid-19

Figure 3.11 shows that from the four months of 2019 when data was captured the majority travelled in December 2019

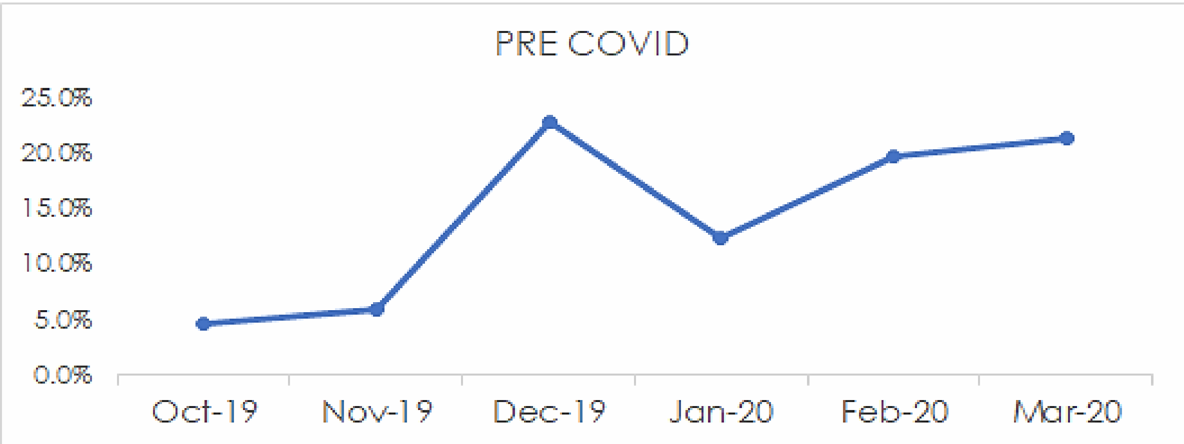

Figure 3.11: Month of travel pre-Covid-19

g) Months of Travel during Covid-19

Figure 3.12 shows that in the year 2020, majority travelled in October followed by December. The sharp increase in travellers in October can be linked to the opening up of travel and easing of curfew regulations by the Government of Kenya as per the ‘Twelfth [12th] Presidential Address on the Covid-19 Pandemic On Monday, 28th September, 2020 at Kenyatta International Convention Centre (KICC), Nairobi’.

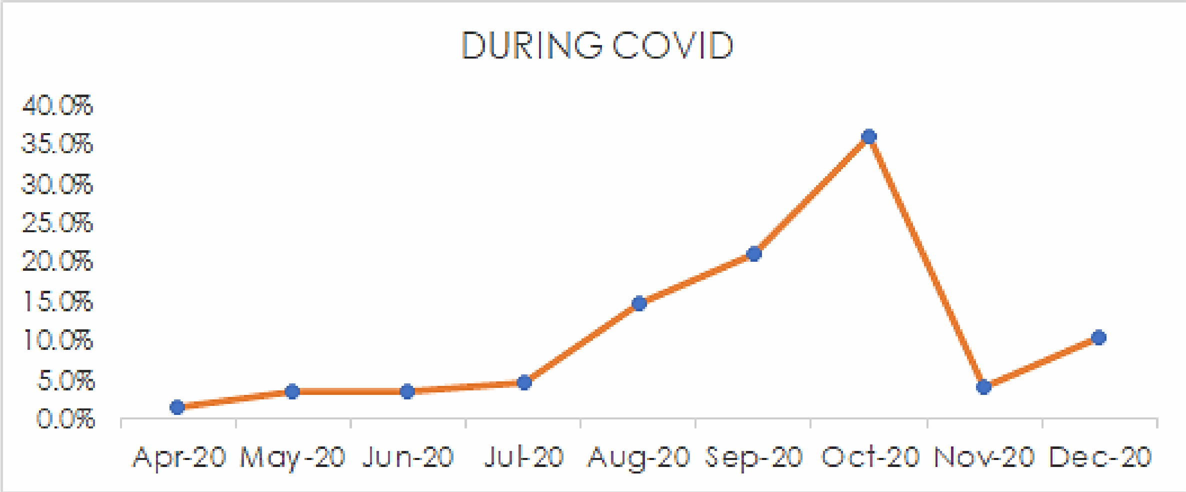

Figure 3.12: Month of travel during Covid-19

3.4. The demographics of Kenyans who did not travel and their reasons for not travelling.

3.4.1. Demographic profile of Kenyan's who did not travel

A total of 539 respondents indicated that they did not travel. Nairobi led by 50.5%, Mombasa (14.3%), Kiambu (5.6%) and Kilifi (3.5%) (Table 3.4).

Table 3.4: Top counties for non-travellers

County	% of respondents
Nairobi	50.5%
Mombasa	14.3%
Kiambu	5.6%
Kilifi	3.5%
Machakos	2.6%
Kajiado	2.4%
Nakuru	2.4%
Kisumu	2.2%
Taita Taveta	1.5%
Meru	1.35%
Uasin Gishu	1.3%
Bungoma	1.1%

a) Gender Profile of those not travelled

From the survey, the gender representation shows that more males (58%) than females did not travel locally (Figure 3.13).

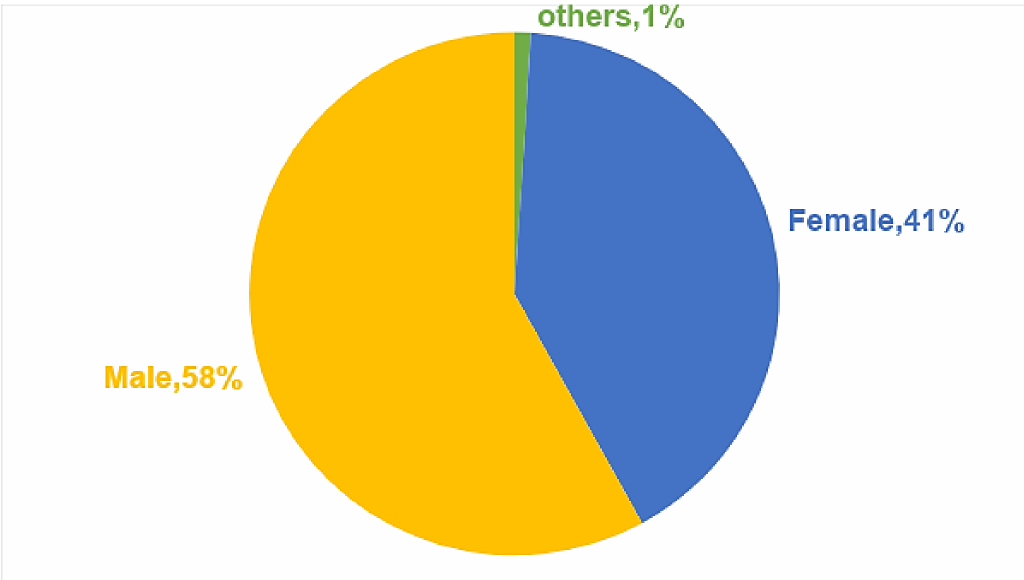

Figure 3.13 Gender profile of not travelled respondents

b) Age profile of those not travelled

The Majority of the respondents that had not travelled were aged 26-35 (36%) followed by 36-50 (26%) and closely followed by ages 19-25 (24%) (Figure 3.14).

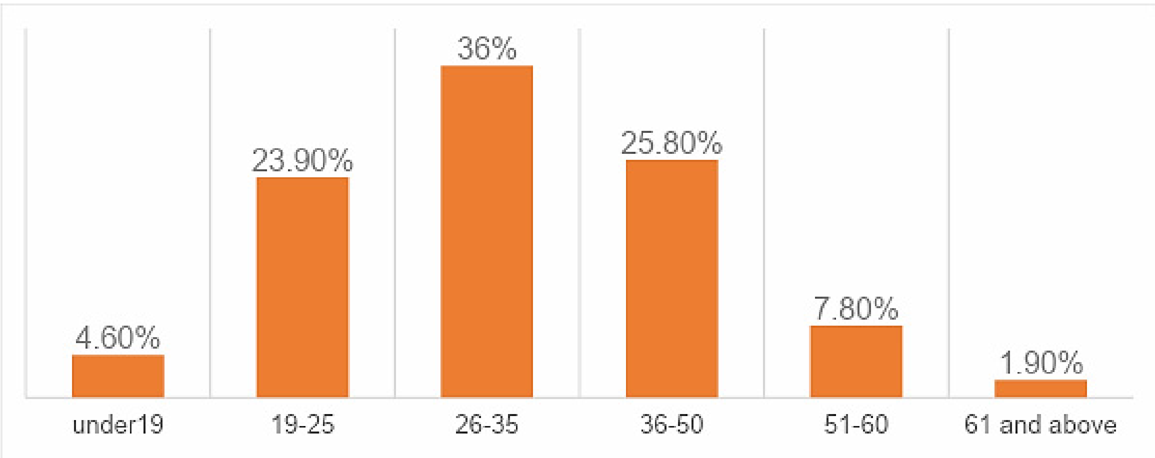

Figure 3.14 Age analysis for Not travelled

c) Level of education

Most who did not travel were educated as shown on 3.14 (35.4%) were holders of undergraduate degrees followed by diploma holders (25.4%) (Figure 3.15).

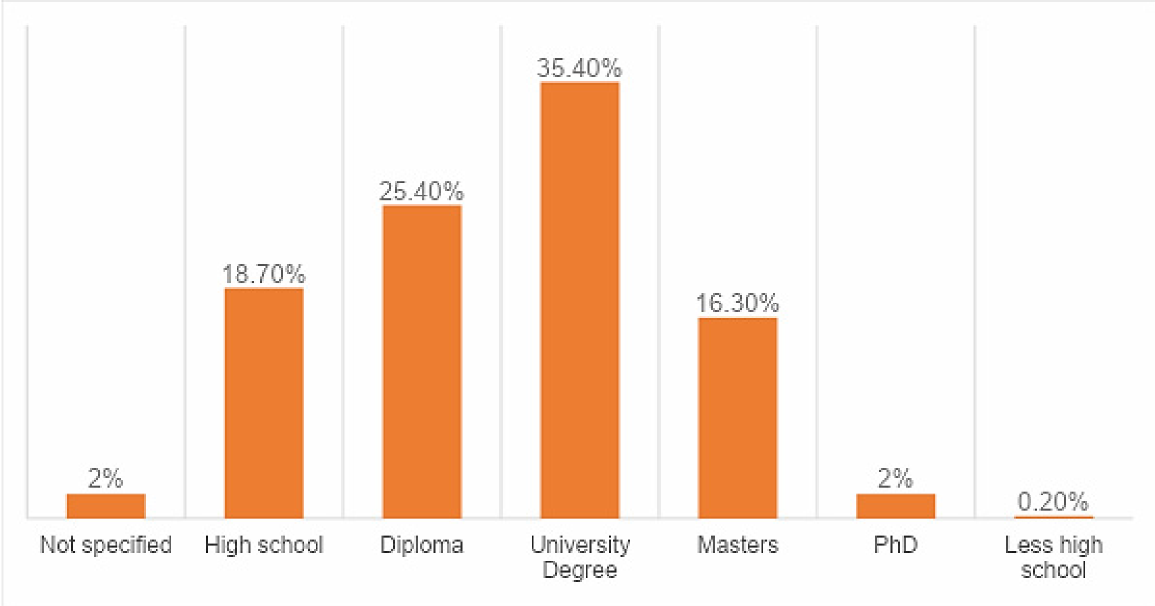

Figure 3.15. Level of education not travelled respondents

d) Gross monthly income

Earners of KES 50,000 and below were the majority (64.6%) of those who did not travel followed by those with incomes ranging 50,001-100,000 at 13.5%. Those that earned 150,001-250,000 were the least at 5.4% (Figure 3.16).

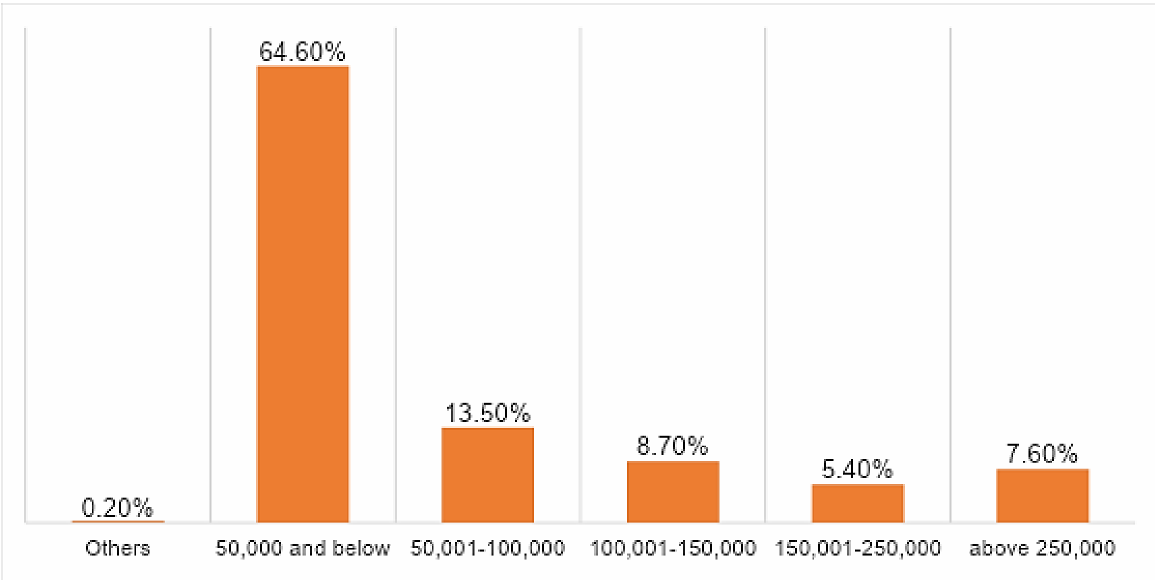

Figure 3.16. Gross monthly income for not travelled respondents

3.4.2 Reasons for not travelling.

The leading reasons cited for not travelling were fear of Covid-19 pandemic (34%) and cost of travel (23.7%). Other reasons were time constraints (16.7%); no planned travel (10%); lack of information (5.4%) (Figure 3.17).

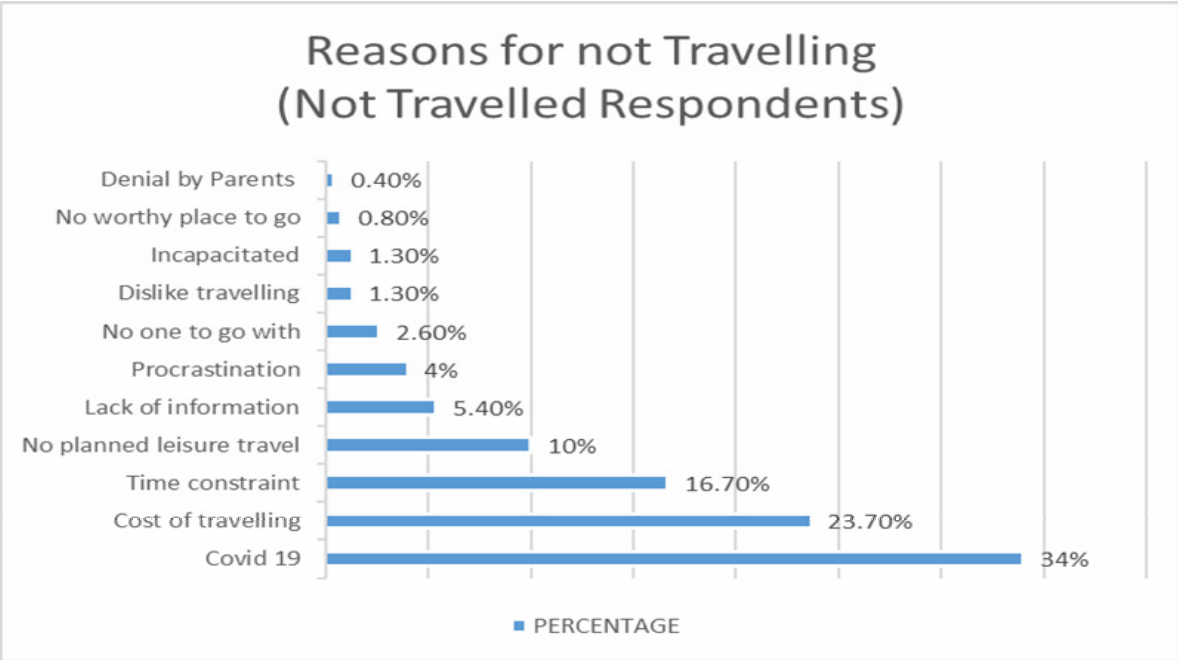

Figure 3.17: Reasons for not travelling

The findings on not travelling were cross tabulated with various the various social-demographic variables as follows:

a) Cross Tabulation of Reason for not travelling against age

The study cross tabulated the reasons for not travelling against ages. The results show that those aged 26 to 35 were the majority in citing the fear of Covid-19, cost of travel and time constraints as the main reasons for not travelling. It is however, also important to note that these two age brackets had the majority of respondents in the survey (Table 3.5).

Table 3.5: Reasons for not travelling by Age

		Age							Total
		Not Specified	Under 19	19-25	26-35	36-50	51-60	Over 60	
Reasons for Not Travelling	COVID 19	0.0%	2.1%	10.8%	18.3%	13.7%	3.9%	1.3%	50.1%
	COST OF TRAVELLING	0.0%	1.5%	10.6%	14.1%	7.7%	1.0%	0.0%	34.9%
	TIME CONSTRAINT	0.2%	0.4%	5.2%	8.9%	8.1%	2.1%	0.6%	25.4%
	NO PLAN TO TRAVEL	0.0%	0.6%	2.3%	5.0%	6.4%	0.8%	0.2%	15.2%
	LACK OF INFORMATION	0.0%	0.0%	1.0%	2.7%	3.5%	0.6%	0.0%	7.7%
	PROCRASTINATION	0.0%	0.0%	1.0%	2.1%	2.7%	0.0%	0.0%	5.8%
	NO ONE TO GO WITH	0.0%	0.6%	1.2%	0.6%	1.2%	0.2%	0.2%	3.9%
	DISLIKE TRAVELLING	0.0%	0.0%	1.0%	0.4%	0.2%	0.2%	0.2%	1.9%
	INCAPACITATED	0.0%	0.2%	0.4%	0.2%	0.2%	0.6%	0.4%	1.9%
	NO WORTHY PLACE TO GO	0.0%	0.0%	0.2%	0.2%	0.4%	0.4%	0.0%	1.2%
	PARENTS TO DENY	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%
Total		0.2%	4.0%	24.1%	36.4%	25.8%	7.5%	1.9%	100.0%

b) Cross Tabulation of Reason for not travelling by gender

The main reason for not travelling by both male and female respondents was the fear of contracting Covid-19. However, more male cited cost of travel, time constraints, no planned travel, lack of information, dislike for travel and no worthy place to go; while more females mentioned lack of company, procrastination (Table 3.6).

Table 3.6. Reasons for not travelling by gender

		Gender			Total
		Others	Female	Male	
Reasons for Not Travelling	COVID 19	0.8%	24.7%	24.7%	50.1%
	COST OF TRAVELLING	1.2%	12.9%	20.8%	34.9%
	TIME CONSTRAINT	0.4%	8.7%	16.4%	25.4%
	NO PLAN TO TRAVEL	0.2%	6.7%	8.3%	15.2%
	LACK OF INFORMATION	0.2%	2.5%	5.0%	7.7%
	PROCRASTINATION	0.2%	3.1%	2.5%	5.8%
	NO ONE TO GO WITH	0.0%	2.5%	1.3%	3.9%
	DISLIKE TRAVELLING	0.0%	0.4%	1.5%	1.9%
	INCAPACITATED	0.0%	1.2%	0.8%	1.9%
	NO WORTHY PLACE TO GO	0.0%	0.2%	1.0%	1.2%
	PARENTS TO DENY	0.0%	0.2%	0.4%	0.6%
Total		1.7%	40.8%	57.4%	100.0%

c) Cross Tabulation of Reason for not travelling against income

A cross tabulation of income levels of the respondents not travelled versus the reasons, shows the majority of the respondents earning KES 50,000 and below cited the fear of Covid-19, cost of travel, time constraints, procrastination and lack of company to travel as the main reasons for not travelling(Table 3.7).

Table 3.7. Reasons for not travelling by income level

		Gross income						Total
		Not Specified	50,000 and below	50,001-100,000	100,001-150,000	150,001-250,000	Over 250,000	
Reasons for Not Travelling	COVID 19	0.2%	28.3%	7.1%	6.4%	3.5%	4.6%	50.1%
	COST OF TRAVELLING	0.0%	28.3%	3.5%	1.5%	0.8%	0.8%	34.9%
	TIME CONSTRAINT	0.0%	13.1%	4.4%	2.1%	3.3%	2.5%	25.4%
	NO PLAN TO TRAVEL	0.0%	7.9%	2.5%	2.9%	0.8%	1.2%	15.2%
	LACK OF INFORMATION	0.0%	3.1%	1.7%	0.6%	1.3%	1.0%	7.7%
	PROCRASTINATION	0.0%	2.5%	1.0%	1.0%	1.2%	0.2%	5.8%
	NO ONE TO GO WITH	0.0%	2.5%	0.0%	0.4%	0.6%	0.4%	3.9%
	DISLIKE TRAVELLING	0.0%	1.3%	0.0%	0.0%	0.2%	0.4%	1.9%
	INCAPACITATED	0.0%	1.3%	0.6%	0.0%	0.0%	0.0%	1.9%
	NO WORTHY PLACE TO GO	0.0%	0.4%	0.2%	0.2%	0.2%	0.2%	1.2%
	PARENTS TO DENY	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.6%
Total		0.2%	64.5%	13.9%	9.1%	5.2%	7.1%	100.0%

d) Reason not travelling by level of education

A cross tabulation of education level of the respondents and the reasons why they did not travel during Covid-19 period was conducted. The results show reasons for not travelling varied significantly across the level of education. A majority of the respondents who cited various reasons were university degree(Table 3.8).

Table 3.8. Reasons for not travelling by level of education

	Education								Total
	Others	Less High School	High school	Certificate	Diploma	University Degree	Masters	Ph.D	
COVID 19	0.8%	0.8%	6.0%	0.0%	11.4%	19.7%	11.0%	0.6%	50.2%
COST OF TRAVELLING	0.8%	1.2%	6.2%	0.2%	8.3%	15.3%	2.7%	0.2%	34.7%
TIME CONSTRAINT	0.6%	0.8%	3.1%	0.0%	6.6%	7.9%	5.6%	1.0%	25.5%
NO PLAN TO TRAVEL	0.4%	0.6%	2.1%	0.0%	3.7%	5.0%	2.9%	0.6%	15.3%

		Education								Total
		Others	Less High School	High school	Certificate	Diploma	University Degree	Masters	Ph.D	
	LACK OF INFORMATION	0.2%	0.2%	0.6%	0.0%	1.5%	3.3%	1.9%	0.0%	7.7%
	PROCRASTINATION	0.2%	0.2%	0.2%	0.0%	1.4%	2.5%	1.2%	0.2%	5.8%
	NO ONE TO GO WITH	0.0%	0.0%	1.0%	0.0%	0.8%	1.2%	1.0%	0.0%	3.9%
	DISLIKE TRAVELLING	0.0%	0.2%	0.4%	0.0%	0.4%	0.4%	0.6%	0.0%	1.9%
	INCAPACITATED	0.0%	0.0%	0.6%	0.0%	0.4%	0.6%	0.0%	0.4%	1.9%
	NO WORTHY PLACE TO GO	0.0%	0.0%	0.0%	0.0%	0.2%	1.0%	0.0%	0.0%	1.2%
	PARENTS TO DENY	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%
Total		1.7%	2.1%	16.0%	0.2%	25.5%	36.3%	16.0%	2.1%	100.0%

Respondents willingness to travel for leisure during covid

All respondents were asked whether they would consider leisure travel during the covid pandemic. A majority of 79.4% answered in the affirmative that they would travel for leisure during covid-19 pandemic (Figure 3.18).

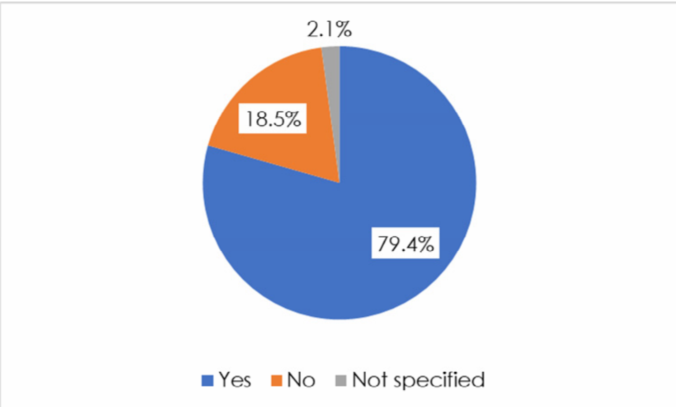

Figure 3.18: Travel for leisure during the covid pandemic

The 18.5% who would not travel for leisure during covid-19 cited various reasons. The leading reasons cited for not travelling were fear of Covid-19 pandemic (77.1%) and reduced income (42.7%). The fear of covid pandemic and costs appear similar reasons for those who did not travel and those who would not travel for leisure during the covid pandemic.

Other reasons cited by those who would not travel for leisure were travel not a priority (27.1%), Health protocols not being adhered to (25.0%), Health protocols insufficient (21.9%), closed facilities/services (16.7%), and No source of income (10.4%) (Figure 3.19).

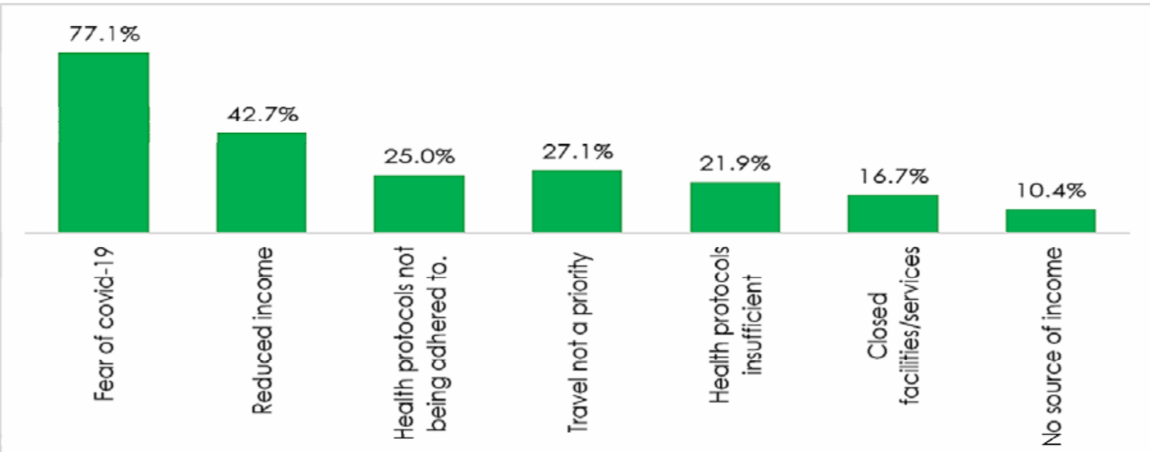

Figure 3.19: 3. 19: Respondents reasons for not travelling for leisure during Covid-19

The study cross tabulated various not travelling for leisure by the various social-demographic variables as follows:

Reason not travelling for leisure by level of education

A cross tabulation of education level of the respondents and the reasons why they did not travel during Covid-19 period was conducted. The results show reasons for not travelling varied significantly across the level of education. A majority of the respondents who cited the various reasons were mostly university degree holders (Table 3.9).

Table 3.9: Reason not travelling for leisure by level of education

		Percentage
Fear of Covid-19	Total	77.08%
	Less High School	1.04%
	High School	9.38%
	Diploma	11.46%
	University Degree	31.25%
	Masters	20.83%
	PhD	3.13%
Reduced income	Total	42.71%
	Less High School	1.04%
	High School	3.13%
	Diploma	8.33%
	University Degree	20.83%
	Masters	9.38%
	PhD	
Health protocols not being adhered to	Total	25.00%
	Less High School	
	High School	3.13%
	Diploma	2.08%
	University Degree	7.29%
	Masters	11.46%
	PhD	1.04%
Travel not a priority	Total	27.08%
	Less High School	
	High School	3.13%
	Diploma	2.08%
	University Degree	12.50%
	Masters	9.38%
	PhD	
Health protocols insufficient	Total	21.88%
	Less High School	
	High School	1.04%
	Diploma	5.21%
	University Degree	10.42%
	Masters	4.17%
	PhD	1.04%
Closed facilities/services	Total	16.67%
	Less High School	
	High School	1.04%

		Percentage
	Diploma	2.08%
	University Degree	8.33%
	Masters	4.17%
	PhD	1.04%
No source of income	Total	10.42%
	Less High School	1.04%
	High School	1.04%
	Diploma	5.21%
	University Degree	3.13%
	Masters	
	PhD	

a) Cross Tabulation of Reason for not travelling for leisure against income

A cross tabulation of income levels of the respondents not travelled versus the reasons, shows the majority of the respondents earning KES 50,000 and below cited the fear of Covid-19 and reduced income as the main reasons for not travelling; while those earning KES 50,001- KES100,000 and above 250,000 mentioning health protocols not being adhered to, 50,001 - 100,000 (7.29%) citing travel not a priority, similar to health protocols insufficient (Table 3.10).

Table 3.10. Reason not travelling for leisure by income bracket

Reason for not travelling during Covid-19 period		Percentage
Fear of Covid-19	Total	77.08%
	50,000 and below	34.36%
	50,001 - 100,000	16.67%
	100,001 - 150,000	4.17%
	150,001 - 250,000	16.67%
	Over 250,000	5.21%
Reduced income	Total	42.71%
	50,000 and below	20.84%
	50,001 - 100,000	7.29%
	100,001 - 150,000	4.17%
	150,001 - 250,000	8.33%
	Over 250,000	2.08%
Health protocols not being adhered to	Total	25.00%
	30,000 and below	6.25%
	50,001 - 100,000	7.29%
	100,001 - 150,000	3.13%
	150,001 - 250,000	7.29%
	Over 250,000	1.04%
Travel not a priority	Total	27.08%
	50,000 and below	10.41%
	50,001 - 100,000	7.29%
	100,001 - 150,000	1.04%
	150,001 - 250,000	5.21%
	Over 250,000	3.13%
Health protocols insufficient	Total	21.88%
	50,000 and below	10.92%

Reason for not travelling during Covid-19 period		Percentage
	50,001 - 100,000	7.29%
	100,001 - 150,000	1.04%
	150,001 - 250,000	3.13%
	Over 250,000	
Closed facilities/services	Total	16.67%
	50,000 and below	6.26%
	50,001 - 100,000	3.13%
	100,001 - 150,000	3.13%
	150,001 - 250,000	3.13%
	Over 250,000	1.04%
No source of income	Total	10.42%
	50,000 and below	8.34%
	50,001 - 100,000	1.04%
	100,001 - 150,000	
	150,001 - 250,000	1.04%
	Over 250,000	

b) Cross Tabulation of Reason for not travelling for leisure against age

A cross tabulation of reasons for not travelling against ages shows the fear of contracting Covid-19 was the top reason for not travelling. This was so mainly among those aged 26 to 35 (28.13%) followed by those aged 36 to 50 (26.05%). It is however, also important to note that these two age brackets had the majority of respondents in the survey (Table 3.11).

Table 3.11. Reason not travelling for leisure by age

Reason for not travelling during Covid-19 period		Percentage
Fear of Covid-19	Total	77.08%
	Under 19	1.04%
	19-25	11.46%
	26-35	28.13%
	36-50	26.04%
	51-60	9.38%
	Over 60	1.04%
Reduced income	Total	42.71%
	Under 19	
	19-25	9.38%
	26-35	16.67%
	36-50	12.50%
	51-60	3.13%
	Over 60	1.04%
Health protocols not being adhered to.	Total	25.00%
	Under 19	
	19-25	2.08%
	26-35	5.21%
	36-50	11.46%
	51-60	4.17%
	Over 60	2.08%

Reason for not travelling during Covid-19 period		Percentage
Travel not a priority	Total	27.08%
	Under 19	
	19-25	4.17%
	26-35	9.38%
	36-50	10.42%
	51-60	3.13%
	Over 60	
Health protocols insufficient	Total	21.88%
	Under 19	
	19-25	3.13%
	26-35	7.29%
	36-50	8.33%
	51-60	3.13%
	Over 60	
Closed facilities/services	Total	16.67%
	Under 19	
	19-25	3.13%
	26-35	6.25%
	36-50	4.17%
	51-60	3.13%
	Over 60	
No source of income	Total	10.42%
	Under 19	
	19-25	6.25%
	26-35	2.08%
	36-50	1.04%
	51-60	1.04%
	Over 60	

c) Cross Tabulation of Reason for not travelling by gender

The main reason for not travelling by both male and female respondents was the fear of contracting Covid-19 followed by reduced income (Table 3.12).

Table 3.12. Reason not travelling for leisure by gender

Reason for not travelling during Covid-19 period		Percentage
Fear of Covid-19	Total	77.08%
	Female	18.75%
	Male	57.29%
Reduced income	Total	42.71%
	Female	7.29%
	Male	34.38%
Health protocols not being adhered to.	Total	25.00%
	Female	5.21%
	Male	19.79%
Travel not a priority	Total	27.08%
	Female	3.13%

Reason for not travelling during Covid-19 period		Percentage
	Male	23.96%
Health protocols insufficient	Total	21.88%
	Female	4.17%
	Male	17.71%
Closed facilities/services	Total	16.67%
	Female	3.13%
	Male	13.54%
No source of income	Total	10.42%
	Female	1.04%
	Male	8.33%

3.5. The Extent and Impact on Domestic Tourism Activities Pre-Covid-19 and during Covid-19

3.5.1. Impact of Covid-19 on major domestic travel components

This section has been organized with the traveller cycle of activities in mind. The cycle can be divided into four main stages namely pre-arrival, arrival, during and departure.

a) Source of information about the attraction

Majority of respondents got information from social media during pre and during Covid-19 (37% and 35% respectively) followed by friends and family (34% both pre and during Covid-19)(Figure 3.20)

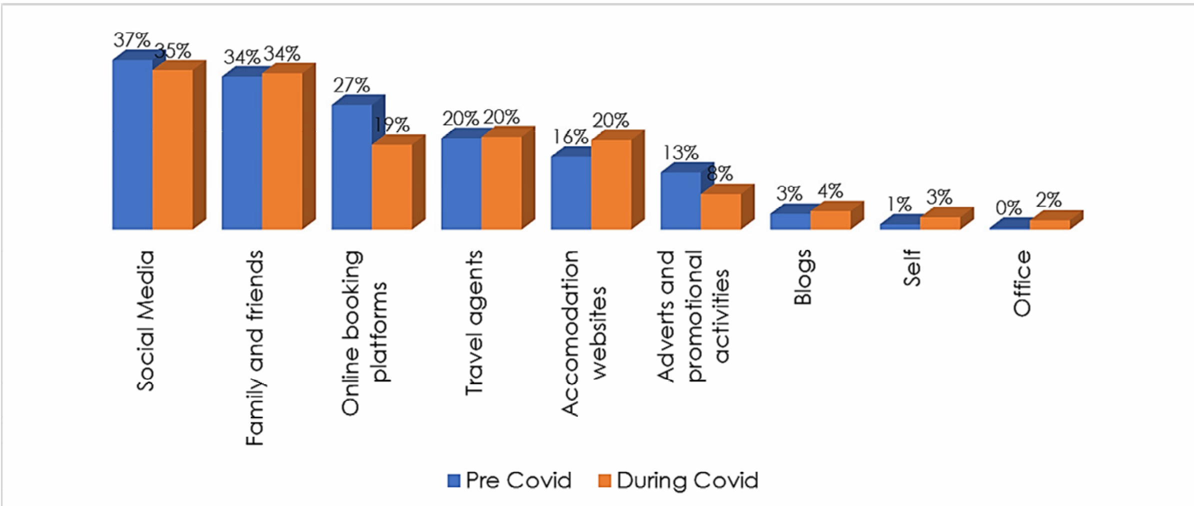

Figure 3.20: Source of information about the attraction

b) All-inclusive cost of travel (bundled package)

The study sought to find out any changes in the total expenditure for respondents whose total cost of travel was inclusive of all expenses. From the findings, the percentage of travellers with all-inclusive packages increased during Covid-19 (from 53.9% pre-Covid to 56.6%). Free independent travel was hire before covid(44.1%)(Figure 3.21).

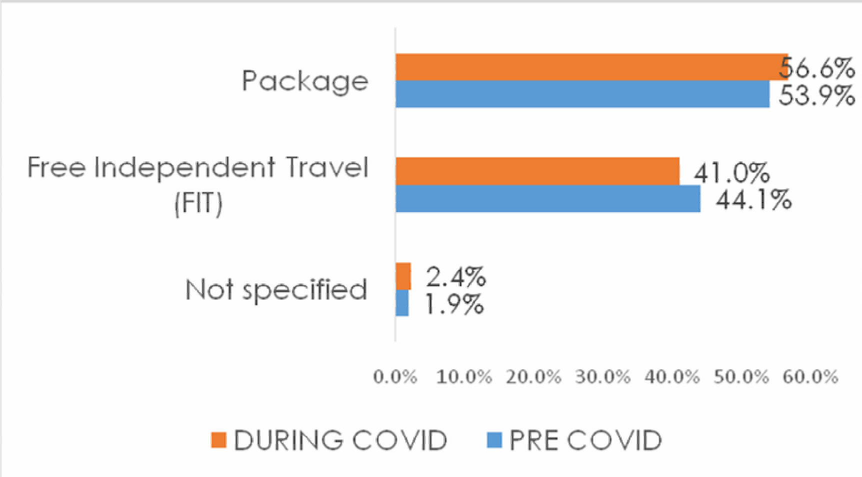

Figure 3.21: Percentage of respondents with inclusive cost of travel

a) Average expenditure on inclusive trips

The average total amount spent on all-inclusive packages decreased substantially during Covid 19, dropping from an average of KES 44,043 pre-Covid to KES. 27,545(Figure 3.22).

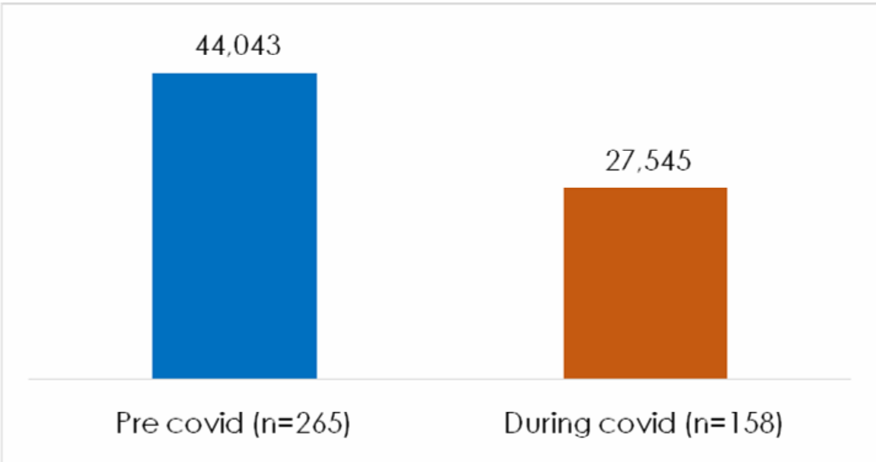

Figure 3.22: Average expenditure on inclusive trips (KES)

b) Costs in the trip

On those whose travel was not on inclusive package, the leading trip expenses both pre- and during Covid-19 were accommodation, transport and food &drinks in this order. Compared to pre-covid period, all travel expenses went down during Covid-19 except for park fees that went up by 8% and other costs incurred by the respondents by 218% (Table 3.13).

Table 3.13: Costs in the trip

Cost of travel	PRE Covid-19				DURING Covid-19				Change (%)
	Total	N	Average	%	Total	N	Average	%	
Transport cost	788,185	107	7,366	23%	1,388,559	209	6,644	18%	-10%
Accommodation cost	1,456,700	92	15,834	42%	3,006,500	199	15,108	40%	-5%
Food and drinks	732,800	102	7,184	21%	1,242,280	199	6,243	17%	-13%
Park fees/other entries	123,104	81	1,520	4%	259,165	158	1,640	3%	8%
Recreational activities	257,177	66	3,897	7%	477,015	156	3,058	6%	-22%
Other costs (not specified)	130,295	51	2,555	4%	1,152,954	142	8,119	15%	218%

This may be an indication of either reduced costs of the key travel expenses, or reduced household budgets allocated to holidays. As studies have shown, household budgets allocated to holidays are also likely to be lower during times of uncertainty and economic instability (Azurite Consulting, 2020; Interface Tourism, 2020a and 2020c; Roland Berger, 2020). These findings are also supported by a domestic tourism survey carried out in 2015/16 by KNBS that showed that the leading travel expenses for the domestic tourists are accommodation, transport and shopping for personal use and gifts or presents (KNBS, 2018).

c) Did prices of products& services change with the onset of Covid 19?

According to 40.2% of the respondents, the prices remained the same; while33.9% said the prices went up; a further 22.8% opined that the prices had reduced (Figure 3.23).

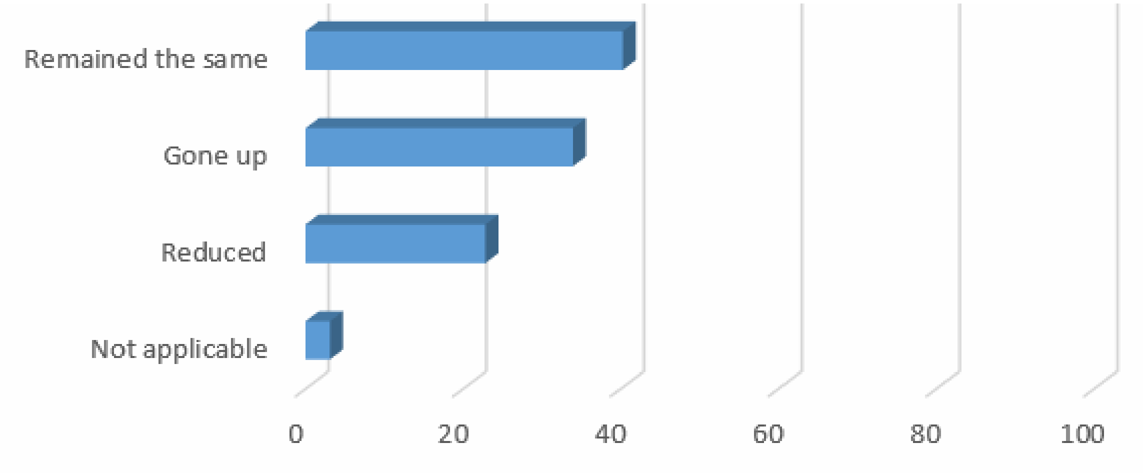

Figure 3.23: Prices of products and services with Covid 19

d) Number of nights spent

The average number of nights for the majority pre-Covid-19 was 4 nights while during Covid-19 this was reduced to 2 nights. These results agree with the domestic tourism survey carried out in 2015/16 that shows average nights spent by domestic visitors was approximately 4 nights, (KNBS, 2018) (Figure 3.24).

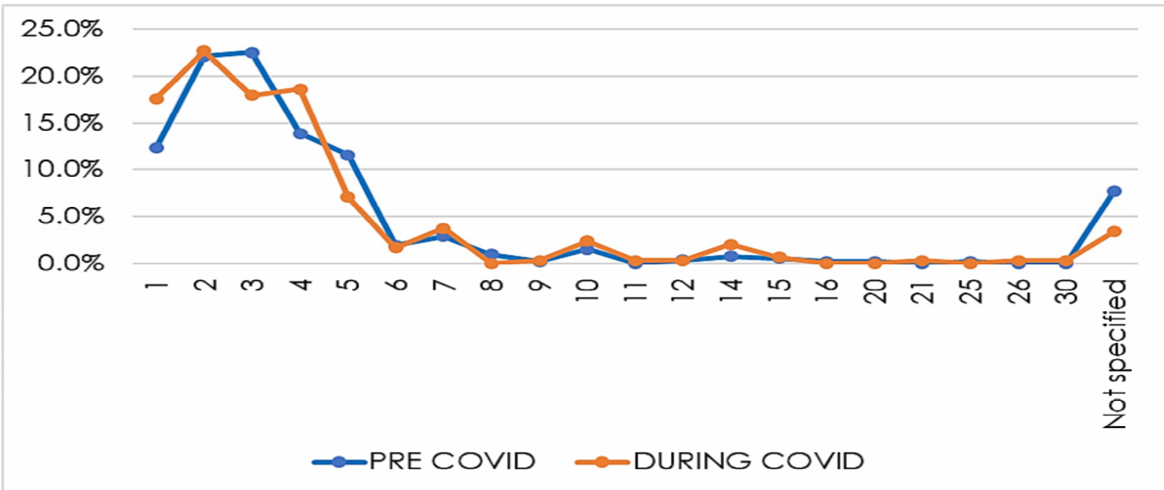

Figure 3.24: Number of nights spent

e) Travel composition

In both pre-Covid-19 and during Covid-19 seasons, majority of travellers were with family (29% and 27% respectively) followed by groups (20% and 23% respectively) and those who travelled alone. Noteworthy, whereas virtually all other forms of travel arrangements recorded a decline during Covid-19, travel in groups increased, rising from 20% pre-Covid-19 to 23% during Covid-19. Similar results were noted for those who travelled with friends (Figure 3.25).

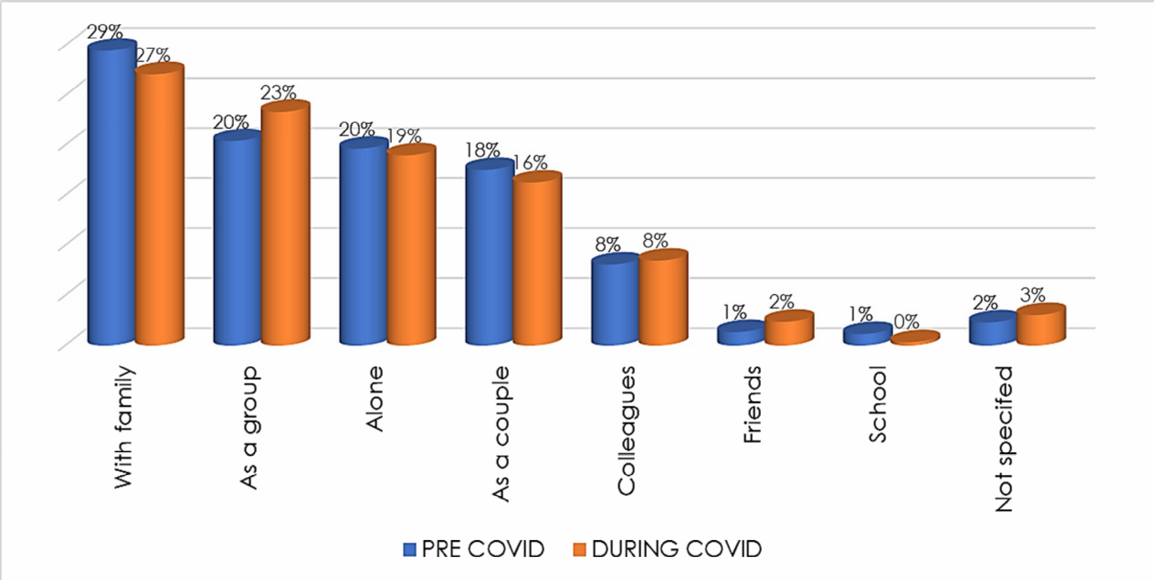

Figure 3.25. Accompanying on the trip

f) The Type of accommodation

In both pre- and during Covid-19, hotel accommodation remained the most preferred by domestic tourists (45% and 36% respectively)(Figure 3.26)

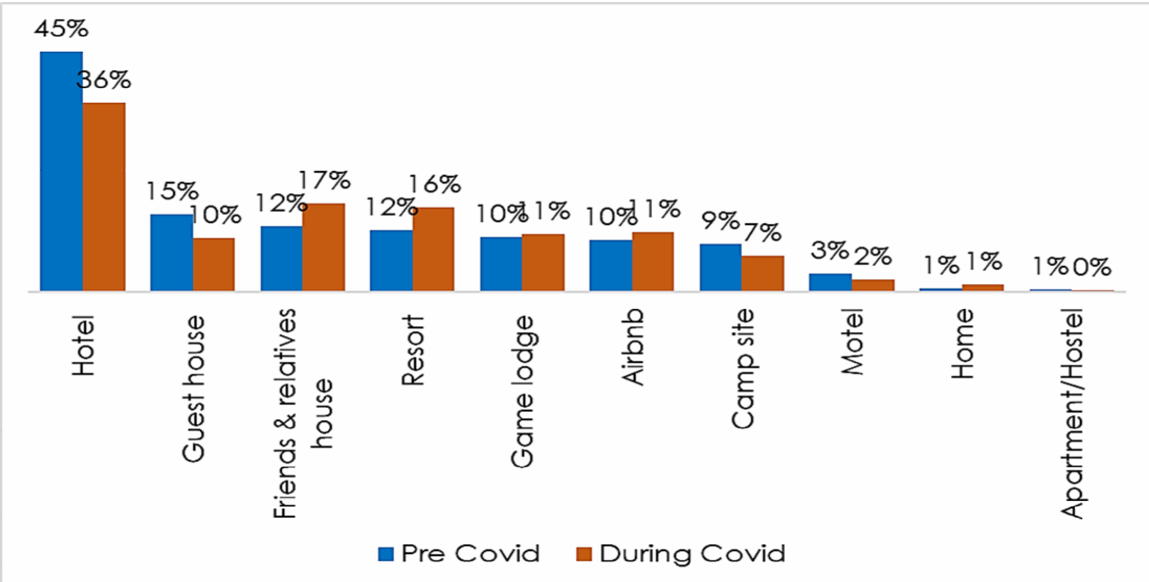

Figure 3.26: Preferred type of accommodation.

Of interest to note, while the preference for hotel accommodation, guest houses, camp sites and motels declined during Covid-19, preference for staying with friends and relatives, resorts, game lodges and Airbnb increased during the Covid-19 period. These findings confirm the assertion by a recent survey by the OECD (2020). According to this study, though there was willingness to travel during the Covid-19 pandemic, when choosing the holiday destination, low tourist density and sanitary conditions were the main attributes a destination needs to attract visitors. Further studies have shown that visitors have been demonstrating preferences for destinations with outdoor activities and contact with nature and away from big cities (DNA, 2020; Interface Tourism, 2020c; Gursoy et al., 2020), VVF, 2020).

g) Attraction sites visited by domestic tourists

The findings show nature and wildlife conservation sites as the most attractive to domestic visitors.Tables 3.10.1 to 3.10.7 gives the details of the specific attraction sites in each category.

The Nature and Wildlife Conservation Sites

The Masai Mara national reserve, Nairobi national park and Tsavo East national park topped the most popular nature and wildlife conservation sites visited by the domestic market (cited 15, 12 and 10 times respectively), (Table 3.14.1)

Table 3.14.1. Nature and Wildlife Conservation Sites

	Attraction site	Times Cited
1.	Masai Mara National reserve	15
2.	Nairobi National Park	12
3.	Tsavo East National Park	10
4.	Mount Longonot National Park	9
5.	KisiteMpunguti Marine Park and Reserve	9
6.	Giraffe Centre, Nairobi	8
7.	Tsavo West National Park	8
8.	Samburu National Reserve	7
9.	Haller Park, Mombasa.	7
10.	Amboseli National Park	7
11.	Ol Pejeta Conservancy	6
12.	Hells Gate National Park	6
13.	Nairobi Animal Orphanage	6
14.	Malindi Marine Park	5
15.	Lake Nakuru National Park	5
16.	Impala Sanctuary Kisumu	4
17.	Nairobi Safari Walk	4
18.	Aberdare national park	4
19.	Shimba Hills National Park	3
20.	NgareNdare forest Reserve	3
21.	Mombasa Marine Park	3
22.	Lewa Wildlife Conservancy	3
23.	Lake Baringo Game Reserve	3
24.	Karura forest	3
25.	ArabukoSokoke Forest Reserve	3

Others: Taita Hills Wildlife Sanctuary, Mau Complex, Lake Naivasha N. Park, Lake Bogoria N. Park, Kereita Forest, Buffalo Springs National Reserve, Lake Baringo National Reserve, Stedmak Gardens Animal, Mnarani Snake Park, Shaba National Reserve, OlDonyoSabuk National Park, Mt. SuswaConservancy,Mount Kenya National Park and Reserve, Meru National Park, Menengai Crater, Marsabit National Park and Reserve, Lake Turkana National Park (specific one not indicated), Lake Elementaita, Kaya forests,Kakamega Forest National Reserve, David Sheldrick Wildlife Trust, Columbus Conservancy, Watamu Marine National Park and Reserve, other parks(unspecified), other marine parks (unspecified) 54

Cities and Urban destinations visited by domestic tourists

Among the cities and urban destinations mentioned as having been visited by domestic tourists, Mombasa was the most popular destination (cited 18out of 87 times)(Table 3.14.2).

Table 3.14.2. Cities and Urban destinations visited by domestic tourists

	Destination	Times cited
1.	Mombasa	17
2.	Naivasha	10
3.	Nairobi	8
4.	Malindi	7

	Destination	Times cited
5.	Watamu	7
6.	Nanyuki	6
7.	Nakuru	6
8.	Machakos	4
9.	Kisumu	3
Others: Narok, Meru, Lamu, Busia, Nyeri, Magadi, Kisii, Kilifi, Kakamega, Kitui, Kajiado, Gilgil, Bunyala		20

Museums and Other Heritage sites

The study findings show thatFort Jesus was the most popular site among museums and other heritage sites visited by Kenya's domestic tourists. Table 3.10.3 provides the popularity of sites visited by the respondents.

Table 3.14.3: Museums and Other Heritage Sites visited by domestic tourists

	Destination	Times cited
1.	Fort Jesus	24
2.	Gede Ruins	9
3.	Vasco Da Gama Pillar	6
4.	National Archives	2
5.	Nairobi National Museum	2
6.	Mombasa Old Town	2
7.	Others (cited once each): ThimlichOhinga, Takwa Ruins, Rabai Museum, Ologesaile, Mnarani Ruins, Loyangalani, Lamu Heritage Site and museum, Jumba la Mtwana, Bomas of Kenya, other historical sites (not specified), other museums (not specified)	21

Beach Destinations Visited by domestic tourists

Among the beaches cited as having been visited by the respondents, Diani Beach was the most popular followed by Nyali Beach (cited 22 and 12 times respectively).Overall, coastal beaches are the most popular among the domestic tourists taking up the top four (4) beach destinations cited ((Table 3.14.4).

Table 3.14.4: Beach Destinations

	Beach	Times Cited
1.	Diani Beach	22
2.	Nyali Beach	12
3.	Watamu Beach	4
4.	Malindi Beach	2
5.	Kendubay beach	1
	Other Beaches (not specified)	19

Island destinations visited by domestic tourists

Wasini and Rusinga were more popular among the Islands (cited 7 and 4 respectively), (Table 3.14.5).

Table 3.14.5: Island Destinations

	Destination	Times cited
1.	Wasini Island	7
2.	Rusinga island	4
3.	Other islands (Lamu Island, Mbita Island, Crescent Island)	3

Resort/Exotic Tourist Facilities

A number of respondents identified tourist facilities as areas that they visited. These were cited thirty-six (36) times of the aggregate 504 citations. Table 3.10.6 provides a list of such facilities, (Table 3.14.6)

Table 3.14.6. Resorts & Other Exotic Facilities

Destination	Cited by
Lake Naivasha Resort, Geothermal Spa, Voyager Ziwani, Voyager Beach, Voi Safari Lodge, Turtle Bay, Subside Hotel, Stedmak Garden & Recreation Center, Sovereign Suites, Savage Wilderness, Reef Hotel, Pec Nature Camp, Oltukai lodge, Nyali Beach hotel, Neptune Palm Beach Resort, Nakuru Lodge, Mount Kenya Lodge, Moorings restaurant,Milele Beach hotel, Maanzonilodge, Lawford Malindi, Forty Thieves Restaurant, Fairmont Mount Kenya, Bofa Beach, Baobab Resort Spa, Bamburi Beach hotel, Archers Post Eco Lodge, Amboseli Serena, 7 Islands-watamu, Chessbay in Port Victoria, The Mamba Village, Amboseli Kibo Camp	36

Other Attraction sites and places

Besides the above specific categories of sites, the respondents identified other attraction places and sites that they visited. Out the fifty-seven (57) times these were cited, Mama Ngina water Front in Mombasa had the highest mentions (cited 9 times), (Table 3.14.7)

Table 3.14.7: Other Popular Attractions

	Destination	Times cited
1.	Mama Ngina Water Front	9
2.	Wild Waters,	2
3.	Ngong Hills	2
4.	Nature Kenya Camping Site And Ecological Centre.	2
5.	Luna Park	2
6.	Likoni Crossing,	2
7.	Lake Victoria	2
8.	Lake Naivasha	2
	Others: Two Rivers Mall-Nairobi, Thompson Falls, Tana River, Suswa, South Horr, Shimoni caves, Red Hill Limuru, Paradise Lost, Ololua Nature Trail, OlJogi Nanyuki, Namanga Border, lake Nakuru, Kitengela Ostrich Farm, Kandagor, Chaka Ranch, Nairobi Arboretum	34

3.5.2 Domestic Tourists Activities Pre- and During Covid-19

In both pre Covid-19 and during Covid-19, game viewing and visiting beaches remained the top popular activities for domestic tourists followed (at a distance) by shopping and water sports (Table 3.12).

The study however, found out that the popularity of game viewing, shopping, water sports and hiking reduced during Covid-19 with game viewing recording the greatest variance (-10.1%). This was expected given other recreational activities increased by 9.3%. As is evident, tourist attractions where social distancing is difficult to maintain were experienced decreased popularity during the covid period, (Table 3.15).

Table 3.15: The Activities participated in by domestic tourists

Activities participated in	Pre Covid-19	During Covid-19	Variance
Game viewing	50.10%	40.00%	-10.10%
Visiting the beach	40.30%	40.30%	0.00%
Water sports	19.10%	18.30%	-0.80%

Activities participated in	Pre Covid-19	During Covid-19	Variance
Shopping	20.00%	15.30%	-4.70%
Hiking	17.30%	10.20%	-7.10%
Other recreation activities	13.10%	22.40%	9.30%
Camping	0.40%	0.70%	0.30%
Boat ride	0.80%	0.70%	-0.10%
Swimming	0.60%	1.40%	0.80%

a) Profile of the activities by gender

In terms of gender of the participants, in almost all activities, there were more male participants than female. However, we saw a decline in game viewing activities among males during Covid-19 period. A similar declining trend is observed on all other recreational activities among men. It is important to note that during Covid-19 period female respondents showed an increase in game viewing, visiting the beach, water sports, hiking, camping and boat rides which showed the risk averse nature of females as compared to males, (Table 3.16).

Table 3.16. Profile of the activities by gender

Activities participated in		Pre Covid-19	During Covid-19
Game viewing	Total	50.10%	40.00%
	Male	35.45%	24.07%
	Female	14.07%	15.93%
Visiting the beach	Total	40.30%	40.30%
	Male	27.36%	20.00%
	Female	12.91%	20.34%
Shopping	Total	20.00%	15.30%
	Male	12.52%	7.80%
	Female	7.51%	7.46%
Water sports	Total	19.10%	18.30%
	Male	13.29%	10.17%
	Female	5.78%	8.14%
Hiking	Total	17.30%	10.20%
	Male	13.10%	6.44%
	Female	3.66%	3.73%
Other recreation activities	Total	13.10%	22.40%
	Male	9.06%	11.19%
	Female	4.05%	11.19%
Camping	Total	0.40%	0.70%
	Male	0.19%	0.68%
	Female	0.19%	0.00%
Boat ride	Total	0.80%	0.70%
	Male	0.58%	0.68%
	Female	0.19%	0.00%
Swimming	Total	0.60%	1.40%
	Male	0.19%	0.34%
	Female	0.19%	1.02%

a) Participation in Activities by age

On the basis of age, in all activities except swimming (where age group 19-25 was the lead majority), age groups 26-35 and 36-50 formed the majority of participants in the rest of activities both pre and during

Covid-19. Overall all recreational activities declined across all age groups during Covid-19 period except other recreational activities that showed an increase. Game viewing declined during Covid-19 among all age groups except over 60 years old, visiting the beach increased across all age groups except for 19-25 years, shopping declined across all age groups during Covid-19 period, water sports declined during Covid-19 period across all age groups except 36-50 years and over 60 years, hiking declined during Covid-19 period across all age groups except 19-25 years and over 60 years, (Table 3.17).

Table 3.17. Participation in activities by age

Activities participated in	Age group	Pre Covid-19	During Covid-19
Game viewing	Total	50.10%	40.00%
	Under 19	0.77%	0.00%
	19-25	7.71%	4.75%
	26-35	22.54%	16.27%
	36-50	15.22%	12.88%
	51-60	2.31%	4.07%
	Over 60	1.54%	2.03%
Visiting the beach	Total	40.27%	40.34%
	Under 19	0.58%	1.02%
	19-25	6.55%	4.07%
	26-35	13.87%	14.24%
	36-50	15.41%	15.93%
	51-60	3.85%	4.75%
	Over 60	0.00%	0.34%
Shopping	Total	20.04%	15.25%
	Under 19	0.19%	0.00%
	19-25	3.66%	2.37%
	26-35	7.71%	5.42%
	36-50	6.74%	5.76%
	51-60	1.73%	1.69%
	Over 60		
Water sports, where and which sports	Total	19.08%	18.31%
	Under 19	0.19%	0.00%
	19-25	3.28%	2.37%
	26-35	7.32%	6.10%
	36-50	6.17%	8.47%
	51-60	2.12%	1.02%
	Over 60	0.00%	0.34%
Hiking	Total	17.34%	10.17%
	Under 19	0.19%	0.00%
	19-25	1.93%	2.03%
	26-35	9.06%	3.39%
	36-50	4.43%	2.71%
	51-60	1.54%	1.36%
	Over 60	0.19%	0.68%
Other recreation activities	Total	13.10%	22.37%
	Under 19		
	19-25	1.93%	2.71%
	26-35	5.39%	5.76%

Activities participated in	Age group	Pre Covid-19	During Covid-19
	36-50	4.82%	11.53%
	51-60	0.96%	1.02%
	Over 60	0.00%	1.36%
Camping	Total	0.39%	0.68%
	Under 19		
	19-25	0.19%	0.68%
	26-35	0.19%	0.68%
	36-50		
	51-60		
	Over 60		
Boat ride	Total	0.77%	0.68%
	Under 19		
	19-25	0.19%	0.00%
	26-35	0.19%	0.68%
	36-50	0.39%	0.00%
	51-60		
	Over 60		
Swimming	Total	0.58%	1.36%
	Under 19	0.00%	0.34%
	19-25	0.39%	0.00%
	26-35	0.19%	0.34%
	36-50	0.00%	0.68%
	51-60		
	Over 60		

b) Participation in tourist activities by level of education

On the basis of level of education, game viewing, beach visits, shopping and sports was most popular among university degree holders. Most recreational activities declined across the level of education during Covid-19 period except for other recreational activities. Travellers with Master degree showed an increase in visiting the beach as well as water sports during Covid-19 period, (Table 3.18).

Table 3.18: Participation in tourist activities by level of education

Activities participated in		Pre Covid-19	During Covid-19
Game viewing	Total	50.10%	40.00%
	Less High School	0.58%	0.00%
	High School	5.39%	3.05%
	Diploma	10.79%	7.80%
	University Degree	21.19%	16.61%
	Masters	10.21%	11.19%
	PhD	1.54%	1.36%
Visiting the beach	Total	40.27%	40.34%
	Less High School	0.19%	0.68%
	High School	3.85%	2.37%
	Diploma	6.17%	4.41%
	University Degree	17.92%	17.97%
	Masters	10.02%	13.90%

Activities participated in		Pre Covid-19	During Covid-19
	PhD	1.93%	1.02%
Shopping	Total	20.04%	15.25%
	Less High School		
	High School	0.77%	0.34%
	Diploma	2.89%	2.37%
	University Degree	10.21%	7.12%
	Masters	5.39%	4.75%
	PhD	0.77%	0.68%
Water sports, where and which sports	Total	19.08%	18.31%
	Less High School		
	High School	1.16%	0.34%
	Diploma	2.50%	2.37%
	University Degree	9.63%	9.15%
	Masters	4.82%	6.10%
	PhD	0.96%	0.34%
Hiking	Total	17.34%	10.17%
	Less High School		
	High School	0.77%	0.68%
	Diploma	4.24%	2.37%
	University Degree	7.51%	5.76%
	Masters	4.62%	1.36%
	PhD	0.19%	0.00%
Other recreation activities	Total	13.10%	22.37%
	Less High School	0.19%	0.68%
	High School	1.73%	1.36%
	Diploma	2.70%	4.07%
	University Degree	5.01%	8.81%
	Masters	2.89%	6.78%
	PhD	0.19%	0.68%
Camping	Total	0.39%	0.68%
	Less High School		
	High School	0.00%	0.34%
	Diploma		
	University Degree	0.39%	0.34%
	Masters		
	PhD		
Boat ride	Total	0.77%	0.68%
	Less High School		
	High School		
	Diploma	0.39%	0.34%
	University Degree	0.19%	0.34%
	Masters	0.19%	0.00%
	PhD		
Swimming	Total	0.58%	1.36%
	Less High School	0.19%	0.00%
	High School	0.00%	0.34%

Activities participated in		Pre Covid-19	During Covid-19
	Diploma	0.19%	0.34%
	University Degree	0.19%	0.34%
	Masters	0.00%	0.34%
	PhD		

c) Activities and income (in KES)

Assessed in terms of income levels, respondents with income of KES 50,000 and below remained dominant across all categories of activities participated in. This income bracket formed the majority of the respondents in this survey. Among the income levels, respondents earning between 150,000 - 250,000 showed an increase in game viewing during Covid-19 period, 50,000 - 100,000 and over 250, 000 showed an increase in visiting the beach during Covid-19 period, (Table 3.19).

Table 3.19 Activities and income

Activities participated in		Pre Covid-19	During Covid-19
Game viewing	Total (KES)	50.10%	40.00%
	50,000 and below	24.66%	17.97%
	50,001 - 100,000	10.21%	7.12%
	100,001 - 150,000	3.66%	3.05%
	150,001 - 250,000	5.59%	6.44%
	Over 250,000	5.78%	5.42%
Visiting the beach	Total	40.27%	40.34%
	50,000 and below	15.79%	11.53%
	50,001 - 100,000	6.74%	9.15%
	100,001 - 150,000	3.85%	4.75%
	150,001 - 250,000	7.90%	6.10%
	Over 250,000	5.97%	8.81%
Shopping	Total	20.04%	15.25%
	50,000 and below	7.70%	6.78%
	50,001 - 100,000	3.47%	3.05%
	100,001 - 150,000	1.93%	1.02%
	150,001 - 250,000	3.66%	2.03%
	Over 250,000	3.28%	2.37%
Water sports, where and which sports	Total	19.08%	18.95%
	50,000 and below	6.55%	4.40%
	50,001 - 100,000	3.47%	3.05%
	100,001 - 150,000	2.12%	2.03%
	150,001 - 250,000	3.66%	3.05%
	Over 250,000	3.28%	5.42%
Hiking	Total	17.34%	10.17%
	50,000 and below	8.10%	5.09%
	50,001 - 100,000	2.89%	2.37%
	100,001 - 150,000	1.54%	0.00%
	150,001 - 250,000	2.50%	1.02%
	Over 250,000	2.31%	1.69%
Other recreation activities	Total	13.10%	22.37%
	50,000 and below	6.36%	6.10%
	50,001 - 100,000	3.47%	6.44%

Activities participated in		Pre Covid-19	During Covid-19
	100,001 - 150,000	1.16%	3.05%
	150,001 - 250,000	0.77%	3.73%
	Over 250,000	1.35%	3.05%
Camping	Total	0.39%	0.68%
	50,000 and below	0.20%	0.68%
	50,001 - 100,000		
	100,001 - 150,000	0.19%	0.00%
	150,001 - 250,000		
	Over 250,000		
Boat ride	Total	0.77%	0.68%
	50,000 and below	0.19%	0.34%
	50,001 - 100,000	0.19%	0.00%
	100,001 - 150,000	0.19%	0.00%
	150,001 - 250,000	0.19%	0.00%
	Over 250,000	0.00%	0.34%
Swimming	Total	0.58%	1.36%
	50,000 and below	0.58%	0.68%
	50,001 - 100,000		
	100,001 - 150,000		
	150,001 - 250,000	0.00%	0.34%
	Over 250,000	0.00%	0.34%

3.6. The motivations for and the future growth prospects for domestic tourism.

3.6.1 Influences to choice of attraction

To the majority of respondents both pre and during Covid-19, the choice of attractions was influenced by the budget (24.4% and 23.3. % respectively) followed by family and friends as well as convenience of travelling (Figure 3.27).

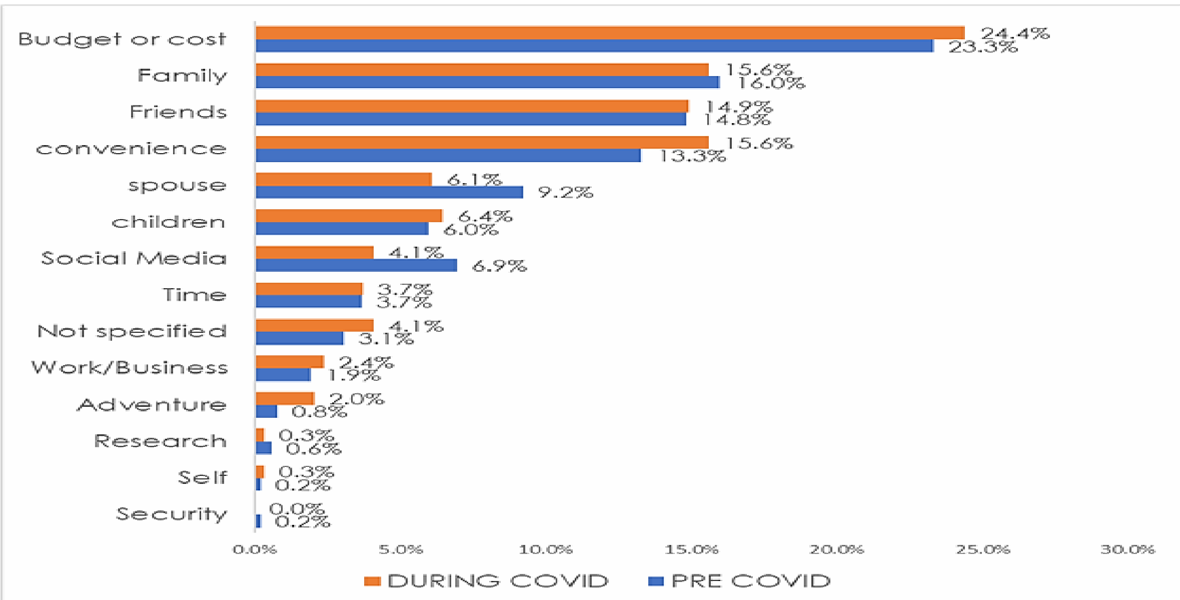

Figure 3.27: Influences to choice of location

3.6.2 Motivations for domestic travel

Domestic travel during Covid-19 period was mainly motivated by planned travel (46.4%), an opportunity presented by minimal crowds (31.2%), and sufficient health protocols (30.2%). Other reasons included the availability of discounts, work related travel, and cabin fever. Every traveller has factors that influence or motivate their travel-destination appeal is among the top motivators that make a destination an ideal choice for a traveller. An ideal destination is one that offers products and services that are relevant to the domestic market behaviours and consumption patterns. Affordability and accessibility was key to the domestic traveller. In addition, the safety for the traveller; infrastructure and superstructure and a varied range of activities at the destinations are great sources of motivation. Figure 3.29 shows the top reasons for travel with Covid-19.

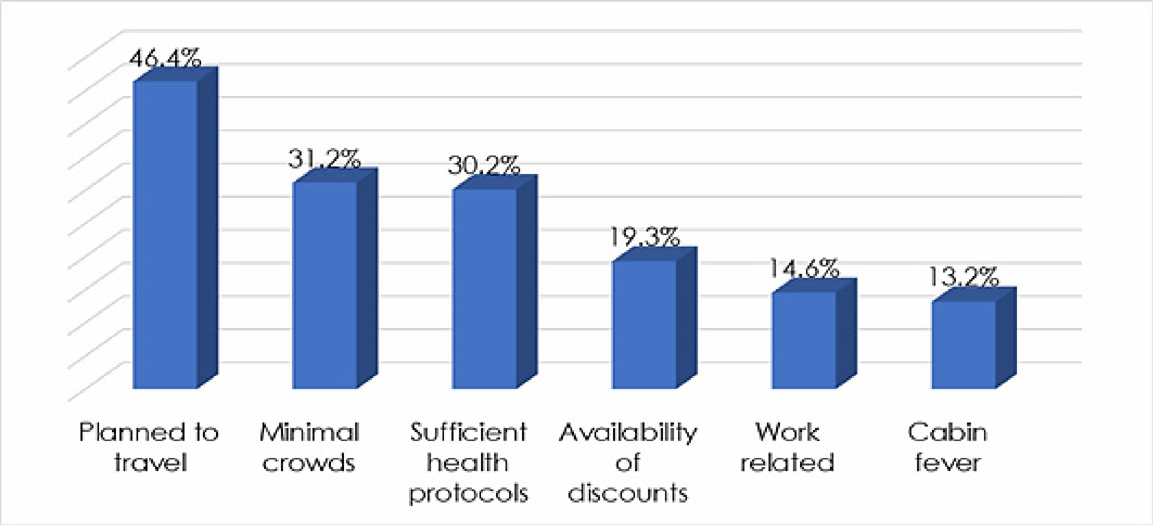

Figure 3.29: Main reasons (motives) for travelling during Covid-19 periods

3.7 Awareness and sufficiency of travel safety and health protocols.

a) Respondents' knowledge of Kenya's tourism and travel health and safety protocols

During the study period, a slight majority (43.5%) of the respondents were aware of the tourism and travel health protocols, 39.4% were not aware while 17.1% did not respond to this question (Figure 3.30).

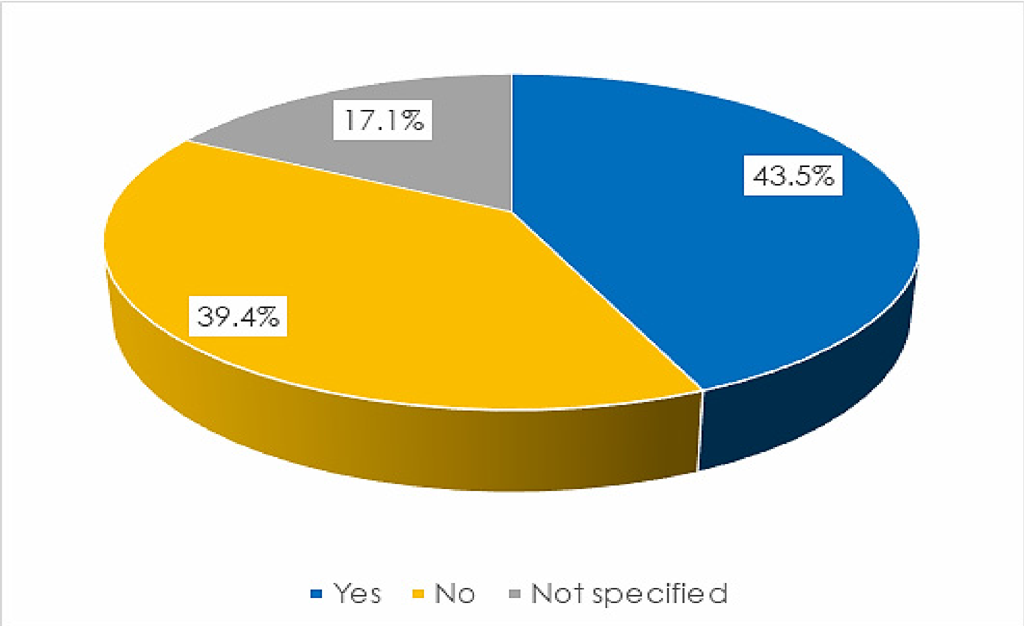

Figure 3.30: Respondents knowledge of Kenya's tourism and travel health and safety protocols

From a gender perspective, more males (46%) had knowledge of health and travel protocols than female respondents (22%). The majority (34%) of those who had knowledge of the health and safety protocols were aged 35-50 years (Table 3.20).

Table 3.20. Knowledge of government travel health and safety protocols against Age

		Age								
	Others	19-25	26-35	36-50	51-60	Above 60	Under 19	Total		
	Count	Count	Count	Count	Count	Count	Count			
Knowledge of protocol	Others	0	1	1	0	0	0	0	2	1.60%
	Yes	0	6	19	34	8	1	0	68	53.50%
	No	0	6	22	21	4	3	1	57	44.90%
	Total	0	13	42	55	12	4	1	127	100%
		0	10.24%	33.07%	43.31%	9.45%	3.15%	0.78%	100%	

b) Sufficiency of and Adherence to travel health and safety protocols

The study sought to assess the extent to which respondents considered the travel health and safety protocols as being sufficient to contain Covid 19 and whether they were being adhered to. A large majority of the respondents (85.7%) indicated that they considered the protocols as being sufficient and that they were being adhered to (Figure 3.31)

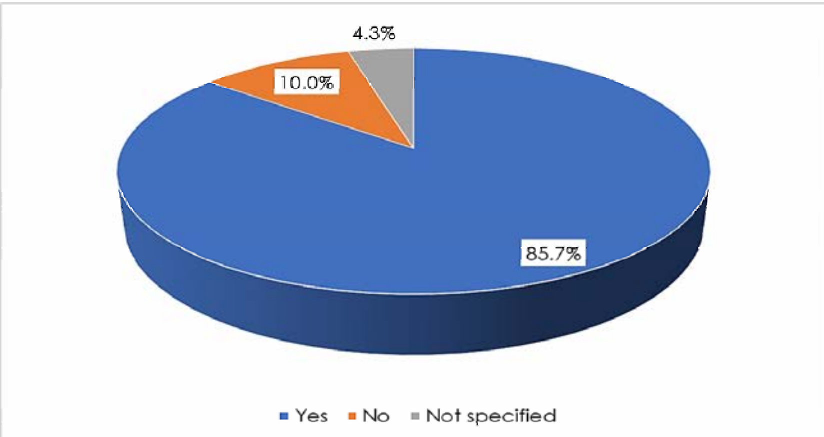

Figure 3.31: Travel health and safety protocols adherence

The above findings are evidence that the campaign by the Ministry of Health for the tourism industry to adhere to Covid 19 containment protocols have borne fruit and are being appreciated by the domestic tourism market as being sufficient to contain the spread of the pandemic and create a safe travel environment.

3.8 Experiences of domestic tourists in Kenya

The study sought to assess domestic tourists' experience with key services and products during both pre- and during Covid-19 (Table 3:21).

Table 3.21: Domestic tourists' experiences pre covid and during covid

Experiences	Period	N	Excellent	Very good	Good	Poor	Very poor
Accommodation	Pre covid	481	3.30%	3.60%	25.60%	45.10%	22.40%
	During covid	263	1.10%	5.70%	23.20%	37.20%	32.70%
Flights	Pre covid	206	9.30%	7.30%	26.20%	32.50%	24.70%
	During covid	100	15.00%	2.10%	27.10%	33.90%	22.10%
SGR	Pre covid	237	12.70%	10.50%	27.80%	34.10%	14.70%
	During covid	97	12.50%	12.50%	23.70%	37.10%	14.30%
Tour Vehicles	Pre covid	247	9.70%	8.40%	25.80%	32.40%	23.50%
	During covid	124	13.80%	8.10%	17.90%	38.80%	21.90%

Experiences	Period	N	Excellent	Very good	Good	Poor	Very poor
Parks/Reserves /Museums and Conservancies	Pre covid	331	7.20%	6.60%	23.20%	41.10%	21.80%
	During covid	166	6.60%	7.80%	22.90%	38.50%	24.20%
Restaurants	Pre covid	391	3.90%	6.60%	32.50%	40.60%	16.30%
	During covid	215	2.70%	5.10%	31.70%	37.20%	23.20%
Other facilities/attractions	Pre covid	220	6.80%	7.30%	32.30%	39.60%	14.20%
	During covid	162	3.10%	7.50%	27.90%	39.50%	22.20%

Overall, majority of respondents rated their experiences with services offered by the tourism industry as either ‘poor’ or ‘good’ (in that order) with “very poor” rating coming third. Among the sampled products, a number of observations can be drawn from the findings. For the accommodation product, whereas majority of respondents rated their experiences with the services as ‘poor” both pre- and during covid, the percentage of those who rated their experiences as ‘very good’ and ‘Very poor’ increased during covid as compared to the pre-covid period.

On flights, the percentage of those who rated their experiences as ‘Excellent’ increased during covid compared to the pre-covid period while those rating their experiences as being ‘very poor’ decreased- indicative of improved customer experience with the product. An almost similar experience was recorded with the SGR where the percentage of those who rated their experiences as ‘Very good’ increased during covid compared to the pre-covid period (from 10.5% to 12.50%). The ‘poor’ experience rating also increased during covid (from 34.1% to 37.10%). Concerning the tour vehicles, the percentage of those who rated their experiences as ‘Excellent’ increased during covid compared to the pre-covid period (from 9.7% to 13.8%). The same trend was however, noted with those rating their experience with the product as ‘poor’ increasing during covid compared to the pre-covid period (from 32.4% to 38.8%).

For Parks/Reserves /Museums and Conservancies, quite minimal changes were noted in the experience rating among the domestic market. As pertains to experience with the Restaurant product, the percentage of those rating their experience as either ‘excellent’, ‘very good’, ‘good’ or ‘poor’ decreased while that of those rating their experience as ‘Very poor’ increased significantly, rising from 16.3% pre-covid to 23.2% during covid.

On those who travelled both pre-and during covid, the findings showed that overall rating of experiences was ‘poor’ to ‘good’. Majority of respondents rated their experiences with ‘accommodation as ‘poor’ followed by ‘very poor’; experience with flights as ‘good’ followed by ‘poor’ and ‘Excellence’. Experience with SGR was rated as ‘poor’, followed by ‘good’ and then ‘excellent’ at equal scores. Experiences with tour vans, Parks/ Reserves /Museums and Conservancies, Restaurants and, Other facilities/attractions were all rated as being ‘poor’ but closely followed by ‘good’, (Table 3.22).

Table 3.22: Experience rating for tourists who travelled both pre-and during covid

Experiences	N	Excellent	Very good	Good	Poor	Very poor
Accommodation	112	0.89%	7.14%	22.32%	39.29%	30.36%
Flight	39	23.08%	2.56%	28.21%	25.64%	20.51%
SGR	38	21.05%	15.79%	21.05%	31.58%	10.53%
Tour Vehicles	58	15.52%	5.17%	24.14%	32.76%	22.41%
Parks/Reserves /Museums and Conservancies	79	7.59%	8.86%	24.05%	39.24%	20.25%
Restaurants	91	1.10%	6.59%	34.07%	35.16%	23.08%
Other facilities/attractions	64	3.13%	7.81%	31.25%	39.06%	18.75%

Overall, it can be seen albeit slight differences, experiences of domestic tourists were largely similar whether before or during covid or even for those who travelled in both periods.

3.8.1 Correlations of experiences with demographic variables.

The experiences were further averaged for the sampled products and correlated with key demographic variables as presented in the following sections.

a) Experience rating against gender

Correlated against gender, the study found out that both gender were in agreement in rating their experiences with Kenya's tourist products as being 'poor' followed by 'good' (Table 3.23).

Table 3.23: Experience rating by gender

Experience rating		Pre Covid-19 (N)	During Covid-19 (N)	Both pre- and during- covid) (N)	Pre Covid	During Covid	both pre- and during- covid)
Rating (Yes)	Total	493	283	120	100.00%	100.00%	100.00%
	Female	143	119	47	100.00%	100.00%	100.00%
	Male	350	164	73	100.00%	100.00%	100.00%
Excellent	Total	11	2		2.22%	0.71%	0.00%
	Female	3			2.10%	0.00%	0.00%
	Male	8	2		2.29%	1.22%	0.00%
Very good	Total	30	24	14	6.05%	8.48%	11.67%
	Female	7	17	5	4.90%	14.29%	10.64%
	Male	23	7	9	6.57%	4.27%	12.33%
Good	Total	142	67	26	28.83%	23.67%	21.67%
	Female	36	27	9	25.17%	22.69%	19.15%
	Male	106	40	17	30.29%	24.39%	23.29%
Poor	Total	226	127	55	45.97%	44.88%	45.83%
	Female	72	53	20	50.35%	44.54%	42.55%
	Male	154	74	35	44.00%	45.12%	47.95%
Very poor	Total	84	63	25	16.94%	22.26%	20.83%
	Female	25	22	13	17.48%	18.49%	27.66%
	Male	59	41	12	16.86%	25.00%	16.44%

b) Experience rating against age

To those Over 60 years, majority (45.45%) noted their experience as being 'very poor' during covid, 'Good' pre-covid (50.00%) and 'poor' for those who travelled during both periods (66.67%). For the 26-35 who formed the majority of the respondents, their experience was rated as 'poor' in the three travel cases. The rest of age categories as shown in Table 3.24.

Table 3.24. Experience rating against age

Experience rating		pre- + during- covid (N)	Pre Covid-19 (N)	During Covid-19 (N)	pre- + during- covid (%)	Pre Covid	During Covid
Rating (Yes)	Total	120	497	283	100.00%	100.00%	100.00%
	Under 19	1	7	3	100.00%	100.00%	100.00%
	19-25	12	81	33	100.00%	100.00%	100.00%
	26-35	40	201	106	100.00%	100.00%	100.00%
	36-50	52	162	106	100.00%	100.00%	100.00%
	51-60	12	38	24	100.00%	100.00%	100.00%
	Over 60	3	8	11	100.00%	100.00%	100.00%
Excellent	Total	0	12	2	0.00%	2.41%	0.71%
	Under 19	0			0.00%	0.00%	0.00%
	19-25	0	5	1	0.00%	6.17%	3.03%
	26-35	0	3	1	0.00%	1.49%	0.94%
	36-50	0	2		0.00%	1.23%	0.00%
	51-60	0	2		0.00%	5.26%	0.00%
	Over 60	0			0.00%	0.00%	0.00%
Very good	Total	14	30	24	11.67%	6.04%	8.48%
	Under 19	0			0.00%	0.00%	0.00%
	19-25	2	5	3	16.67%	6.17%	9.09%

Experience rating		pre- + during-covid (N)	Pre Covid-19 (N)	During Covid-19 (N)	pre- + during-covid (%)	Pre Covid	During Covid
	26-35	5	8	11	12.50%	3.98%	10.38%
	36-50	6	14	5	11.54%	8.64%	4.72%
	51-60	1	3	4	8.33%	7.89%	16.67%
	Over 60	0		1	0.00%	0.00%	9.09%
Good	Total	26	143	67	21.67%	28.77%	23.67%
	Under 19		4	1	0.00%	57.14%	33.33%
	19-25	2	17	8	16.67%	20.99%	24.24%
	26-35	8	57	26	20.00%	28.36%	24.53%
	36-50	12	51	24	23.08%	31.48%	22.64%
	51-60	3	10	4	25.00%	26.32%	16.67%
	Over 60	1	4	4	33.33%	50.00%	36.36%
Poor	Total	55	228	127	45.83%	45.88%	44.88%
	Under 19	1	1	1	100.00%	14.29%	33.33%
	19-25	7	39	15	58.33%	48.15%	45.45%
	26-35	17	92	49	42.50%	45.77%	46.23%
	36-50	22	74	52	42.31%	45.68%	49.06%
	51-60	6	19	9	50.00%	50.00%	37.50%
	Over 60	2	3	1	66.67%	37.50%	9.09%
Very poor	Total	25	84	63	20.83%	16.90%	22.26%
	Under 19	0	2	1	0.00%	28.57%	33.33%
	19-25	1	15	6	8.33%	18.52%	18.18%
	26-35	10	41	19	25.00%	20.40%	17.92%
	36-50	12	21	25	23.08%	12.96%	23.58%
	51-60	2	4	7	16.67%	10.53%	29.17%
	Over 60		1	5	0.00%	12.50%	45.45%

c) Experience rating and level of education

In terms of education level, university degree and masters educated travellers who formed majority of respondents, their experience was noted as ‘poor’ across all the three travel periods. For the diploma holders, their experience was rated as ‘poor’ pre, during covid and pre-covid (76.92% and 47.96% respectively) but equally ‘good’ and ‘very poor’ during covid. The rest of education categories as shown in Table 3.25.

Table 3.25. Experience rating versus level of education

Experience rating		pre- + during-covid (N)	Pre Covid-19 (N)	During Covid-19 (N)	pre- + during-covid	Pre Covid	During Covid
Rating (Yes)	Total	120	493	283	100.00%	100.00%	100.00%
	Less High School		3	4		100.00%	100.00%
	High School	8	49	17	100.00%	100.00%	100.00%
	Diploma	13	98	49	100.00%	100.00%	100.00%
	University Degree	53	215	125	100.00%	100.00%	100.00%
	Masters	41	113	79	100.00%	100.00%	100.00%
	PhD	5	15	9	100.00%	100.00%	100.00%
Excellent	Total		12	2	0.00%	2.43%	0.71%
	Less High School		2			66.67%	0.00%
	High School		3		0.00%	6.12%	0.00%
	Diploma		2	1	0.00%	2.04%	2.04%
	University Degree		5	1	0.00%	2.33%	0.80%
	Masters				0.00%	0.00%	0.00%
	PhD				0.00%	0.00%	0.00%
Very good	Total	14	29	24	11.67%	5.88%	8.48%

Experience rating		pre- + during-covid (N)	Pre Covid-19 (N)	During Covid-19 (N)	pre- + during-covid	Pre Covid	During Covid
	Less High School					0.00%	0.00%
	High School	1	3		12.50%	6.12%	0.00%
	Diploma		5	6	0.00%	5.10%	12.24%
	University Degree	9	14	9	16.98%	6.51%	7.20%
	Masters	3	6	8	7.32%	5.31%	10.13%
	PhD	1	1	1	20.00%	6.67%	11.11%
Good	Total	26	143	67	21.67%	29.01%	23.67%
	Less High School		1	1		33.33%	25.00%
	High School	2	16	1	25.00%	32.65%	5.88%
	Diploma	3	29	15	23.08%	29.59%	30.61%
	University Degree	12	54	30	22.64%	25.12%	24.00%
	Masters	9	36	16	21.95%	31.86%	20.25%
	PhD		7	4	0.00%	46.67%	44.44%
Poor	Total	55	227	127	45.83%	46.04%	44.88%
	Less High School			2		0.00%	50.00%
	High School	4	16	9	50.00%	32.65%	52.94%
	Diploma	10	47	12	76.92%	47.96%	24.49%
	University Degree	20	104	60	37.74%	48.37%	48.00%
	Masters	19	56	40	46.34%	49.56%	50.63%
	PhD	2	4	4	40.00%	26.67%	44.44%
Very poor	Total	25	82	63	20.83%	16.63%	22.26%
	Less High School			1		0.00%	25.00%
	High School	1	11	7	12.50%	22.45%	41.18%
	Diploma		15	15	0.00%	15.31%	30.61%
	University Degree	12	38	25	22.64%	17.67%	20.00%
	Masters	10	15	15	24.39%	13.27%	18.99%
	PhD	2	3		40.00%	20.00%	0.00%

d) Experience rating by income

In all income categories, the leading majority noted their experience as being 'poor' followed by 'good'. Table 3.26 presents the complete tabulation of the experiences for each income category.

Table 3.26 Experience rating versus income

Experience rating		pre- + during-covid (N)	Pre Covid-19 (N)	During Covid-19 (N)	pre- + during-covid (%)	Pre Covid	During Covid
Rating (Yes)	Total	120	497	283	100.00%	100.00%	100.00%
	30,000 and below	28	150	66	100.00%	100.00%	100.00%
	30,001 - 50,000	13	83	46	100.00%	100.00%	100.00%
	50,001 - 100,000	21	94	54	100.00%	100.00%	100.00%
	100,001 - 150,000	9	41	28	100.00%	100.00%	100.00%
	150,001 - 250,000	24	69	42	100.00%	100.00%	100.00%
	Over 250,000	25	60	46	100.00%	100.00%	100.00%
Excellent	Total		12	2	0.00%	2.41%	0.71%
	30,000 and below		8		0.00%	5.33%	0.00%
	30,001 - 50,000		3	1	0.00%	3.61%	2.17%
	50,001 - 100,000			1	0.00%	0.00%	1.85%
	100,001 - 150,000				0.00%	0.00%	0.00%
	150,001 - 250,000		1		0.00%	1.45%	0.00%
	Over 250,000				0.00%	0.00%	0.00%
Very good	Total	14	30	24	11.67%	6.04%	8.48%

Experience rating		pre- + during-covid (N)	Pre Covid-19 (N)	During Covid-19 (N)	pre- + during-covid (%)	Pre Covid	During Covid
	30,000 and below	4	11	7	14.29%	7.33%	10.61%
	30,001 - 50,000	3	6		23.08%	7.23%	0.00%
	50,001 - 100,000	1	5	9	4.76%	5.32%	16.67%
	100,001 - 150,000	1	3	2	11.11%	7.32%	7.14%
	150,001 - 250,000	2	2	3	8.33%	2.90%	7.14%
	Over 250,000	3	3	3	12.00%	5.00%	6.52%
Good	Total	26	143	67	21.67%	28.77%	23.67%
	30,000 and below	5	40	21	17.86%	26.67%	31.82%
	30,001 - 50,000	3	24	6	23.08%	28.92%	13.04%
	50,001 - 100,000	6	36	13	28.57%	38.30%	24.07%
	100,001 - 150,000	3	9	4	33.33%	21.95%	14.29%
	150,001 - 250,000	4	19	12	16.67%	27.54%	28.57%
	Over 250,000	5	15	10	20.00%	25.00%	21.74%
Poor	Total	55	228	127	45.83%	45.88%	44.88%
	30,000 and below	16	68	21	57.14%	45.33%	31.82%
	30,001 - 50,000	5	37	24	38.46%	44.58%	52.17%
	50,001 - 100,000	10	37	17	47.62%	39.36%	31.48%
	100,001 - 150,000	4	24	19	44.44%	58.54%	67.86%
	150,001 - 250,000	12	34	19	50.00%	49.28%	45.24%
	Over 250,000	8	28	27	32.00%	46.67%	58.70%
Very poor	Total	25	84	63	20.83%	16.90%	22.26%
	30,000 and below	3	23	17	10.71%	15.33%	25.76%
	30,001 - 50,000	2	13	15	15.38%	15.66%	32.61%
	50,001 - 100,000	4	16	14	19.05%	17.02%	25.93%
	100,001 - 150,000	1	5	3	11.11%	12.20%	10.71%
	150,001 - 250,000	6	13	8	25.00%	18.84%	19.05%
	Over 250,000	9	14	6	36.00%	23.33%	13.04%

3.9 Domestic Tourists' value for money pre- and During Covid-19

Perceived value for money was high in both pre and during Covid-19 (94.4% and 94.6% respectively). This was the case despite the respondents majorly rating the services and facilities offered as 'poor' or 'good', (Figure 3.32).

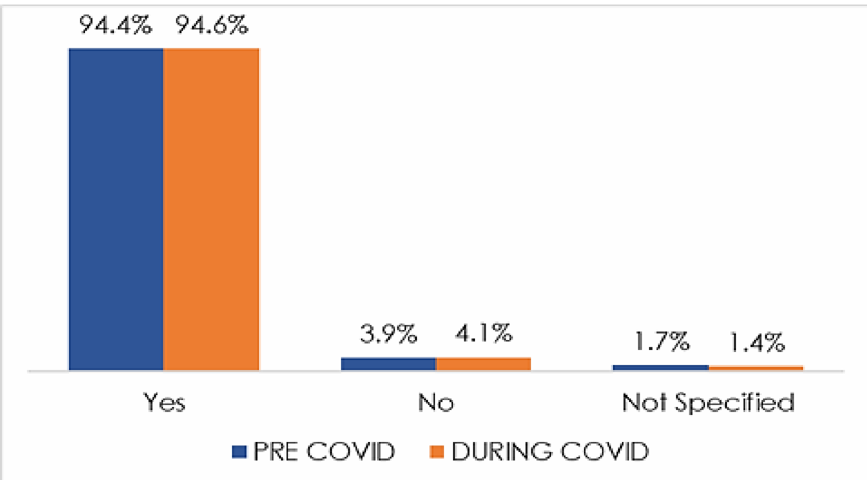

Figure 3.32: Value for money

Zeithaml (1988) defines value as the quality that the consumer receives for the price paid and value is what the consumer gets for what they give. Value for money can also be defined as monetary valuation by comparing the benefits and sacrifices (Bolton and Drew, 1995). Going by this definition, it can be concluded that though the quality of services and facilities was generally low, the price charged to the domestic market was commensurate with the offering.

In terms of gender, more males (77%) indicated that they experienced value for money compared to females (50%), (Table 3.27).

Table 3.27. Value for money by gender

	Value for Money					
	Others	Yes	No	Totals	%	
	Count	Count	Count			
Gender	Others	0	0	0	0	0
	Female	0	48	2	50	39.93%
	Male	1	74	2	77	60.07%
	Totals	1	122	4	127	100%
		0.80%	96.06%	3.14%	100%	

In terms of age, majority of those experienced better value for money were aged between 36 and 50 years, (Table 3.28).

Table 3.28. Perceived value for money versus age

		Value for Money			
		Others	**Yes**	**No**	**Totals**
		Count	Count	Count	
Age	Others	0	0	0	0
	19-25	0	13	0	13
	26-35	1	41	0	42
	36-50	0	51	4	55
	51-60	0	12	0	12
	Above 60	0	4	0	4
	Under 19	0	1	0	1
	Totals	1	122	4	127

3.9.1 Reasons for perceived lack of value for money

The following verbatim excerpts demonstrate some of the concerns raised by the respondents as contributing to their perceived lack of value for money from Kenya's tourism industry:

Hotels

'At […] there is no good customer care"

"what I had expected to find there was not there and the services were poor"

"Hotel over promised and under-delivered"

"The hotel rates in Mombasa are too high. I spent less for another location such as Dubai and Zanzibar."

Parks and reserves

"At […] no tour guide to explain".

"The reserve is run down, no proper signage, road was not well maintained,"

"Not so many extra activities one can engage in in the park."

"less animals in the park"

Restaurants

"The food was not good"

Flights

"Flight cost are high - we need cheaper flights"

Quality

"First make sure that the quality of resorts and organizations are of higher level."

[…] Names withheld

3.10 Challenges facing domestic tourism in Kenya

An open ended question was asked to the respondents on what they considered as challenges facing the domestic tourism in Kenya. From the survey, some of the challenges identified are as indicated below:

1. The high cost of holiday including transportation, accommodation, food and beverage
2. Poor state and management of the facilities leading to lower satisfaction levels
3. Lack of targeted marketing which has led to many market segments being left out of the tourism map.
4. Inadequate support from some of suppliers to the travelers in enabling them have full experiences at the destinations e.g lack of guides.
5. Inadequate adherence to new measures to combat spread of the covid-19 virus among some establishments.
6. Lack of or limited publicity to some the attractions and destinations among the travelers
7. Lack of or poor knowledge among the locals on receiving guests and hosting them.
8. Lack of publicity on cuisines and cultures.

The current findings are largely in agreement with those of the survey on Domestic Tourism Recovery Strategies for Kenya where the following were outlined as challenges to facing domestic tourism:

1.	Lack of knowledge by the locals.
2.	Negative perceptions that tourist destinations are for the rich and foreign.
3.	Lack of own transport.
4.	Less hospitable treatments to local tourists by service providers.
5.	Unfamiliar food types in hotels.
6.	Marketing that does not resonate with local people.
7.	Lack of disposable income and free time.

Affordability remains a major challenge to access of attractions among locals in domestic destinations. A study by Kwoba (2018) in Namibia revealed that high prices were a major hindrance to take up of domestic tourism. The prices for most tourism products were steep and beyond the income bracket of many. In order to curb this, tourism enterprises introduced a tier pricing system that differentiated prices paid by locals and that paid by international tourists. They indicated that the best incentive that appealed to most Namibians was to lure them to travel by offering discounts and special packages.

To overcome the challenges aforementioned, building a strong domestic travel and tourism sector can help a country withstand shocks and demand fluctuations that may arise when crises affect external source markets. Towards this goal, a number of suggestions have been mooted. The survey on Domestic Tourism Recovery Strategies for Kenya (MoTW, 2020) for instance recommended the following strategies:

- Layered pricing strategies
- Tourism Marketing and Promotion Campaigns
- Infrastructure Development and Betterment
- Diversification of the Tourism Products and Markets
- Strong Partnerships and Collaborations
- Image Rebuilding and Destination Repositioning
- Review Taxes, Charges, Levies and Regulations Impacting Transport and Tourism
- Ensuring of Consumer Protection and Confidence
- Campaigns to encourage Domestic Tourism
- Pricing Initiatives
- Provision of Direct Incentives
- Provide Financial Stimulus for Tourism Investment and Operations
- Enablement of Leisure Policies.

3.11 Domestic market recommendations for improving travel experience

Asked on what they considered as way forward in the efforts to enhance domestic tourism in Kenya, the respondents proposed measures in the following thematic areas:

Marketing and Promotion

- 'Create awareness through advertisements (local and international media), social media & other online platforms, schools, print media, government institutions, brand ambassadors and also the utilization all available platforms for a wider each including rural areas'

Pricing

- We need better prices for different categories of tourists.
- Give us price incentives especially for us local tourists.
- Hotel prices need to be looked [into]

Infrastructure

- Upgrade the facilities to international standards to attract more tourists
- Improve the infrastructure like the park roads and normal road as well
- Improve infrastructure like roads and telecommunication networks for ease of access to local tourist site

- Provide documentaries for us to learn more about the attractions.
- Improve on security in the country

Product development

- Develop tourism products around culture and heritage through diversification
- We need more all-inclusive value packages

Government Interventions

- Give stimulus package to the stakeholders to improve their businesses
- Train hotel and restaurant personnel in terms of customer services
- Introduce policies to promote tourism and provide clarity on Taxation to the investors
- Curb corruption within the tourism sector
- Crack down on police corruption and bad drivers
- Provide more sensitization on environmental awareness to include maintain of cleanliness, avoidance of pollution.
- Give local education and creation of awareness of our flora and fauna

4

SECTION 4: CONCLUSIONS AND RECOMMENDATIONS

SECTION 4: CONCLUSIONS AND RECOMMENDATIONS

4.1 An Overview of key findings

The purpose of this survey was to understand the profiles of domestic tourists, the type and extent of domestic tourism in Kenya, and to obtain information on the experiences of domestic leisure tourists both before and during Covid-19 and their needs going forward. Specifically, the survey sought to;

1. Capture the demographics of domestic tourists' before and during Covid-19.
2. Obtain the demographics of the Kenyans who do not travel and their reasons for not travelling.
3. Understand the extent and impact of domestic tourism activities before and during Covid-19
4. Gauge awareness and the effect of The Tourism and Travel Safety and Health Protocols.
5. Understand the motivation for and the future growth prospects for domestic tourism.
6. Evaluate the experiences of domestic tourists in Kenya with a view to inform policy makers, attractions managers and service providers on areas of improvement.

Provided below is a summary of key findings under the study objectives

Demographics of domestic tourists and their travel experiences pre Covid-19 and during Covid-19

The demographics of domestic tourists' pre-Covid-19 and during Covid-19

- From the study findings, a greater percentage of the respondents were those who had travelled (63.9%) in the given period compared to those who did not travel (36.4%).
- Majority of the respondents were male (62.4%) with most (37.4%) falling in the age bracket between 26 and 35 years. The study showed that the number of females who indicated that they travelled during Covid-19 increased compared to the pre Covid-19 period as opposed to the number of male travellers that decreased during Covid-19 compared to the pre Covid-19 period.
- Majority hailed from Nairobi followed by Mombasa (51.0% and 12.3% respectively).
- Majority (50.3%) of the respondents earned 50,000KES and below per month. Both before and during the Covid-19 periods, the most popular modes of travel were private cars (42.4%) followed by public road transport and airplanes both at 14.2%.
- Most of the travellers in the pre-Covid and during Covid 19 periods were holders of a university degree (43.0%) and 44.1% respectively).

Demographics of the Kenyans who did not travel and their reasons for not travelling

The survey found majority of those who did not travel during Covid had the following demographic characteristics.

- Were mainly residents of Nairobi (50.5%) with Mombasa coming at a distant second (14.3%).
- More males (58%) than females did not travel locally.
- Were aged between 26-35 (36%) followed by 36-50 (26%) and closely followed by the ages between 19-25 (24%).
- Were mainly holders of undergraduate degrees (35.4%) followed by diploma holders (25.4%).
- Were earners of KES 50,000 and below (64.6%) followed by those with incomes ranging between KES 50,001- KES100,000 at 13.5%.

On the reasons for not traveling, the study found out some key reasons for not travelling among Kenya's domestic tourists were

1. Covid-19 pandemic (34%);
2. Cost of travel (23.7%);
3. Time constraints (16.7%);
4. No planned travel (10%);
5. Lack of information (5.4%)

These reasons however, varied across respondents of different demographic characteristics.

The Extent and Impact of Domestic Tourism Activities pre Covid-19 and during Covid-19

A number of changes to domestic travel arrangements and activities were noted during the Covid 19 period.

- Overall during both the pre-Covid and during Covid period, the leading trip expenses were accommodation, transport and food and drinks in this order.
- Compared to the pre-Covid period, expenditure on all travel components went down during Covid 19 except for park fees that went up by 8%
- The average number of nights spent dropped from 4 nights before Covid-19 to 2 nights during Covid-19
- In both seasons, majority of travellers were accompanied by family (29% and 27% respectively) followed by those travelling in groups (20% and 23% respectively).
- Virtually all other forms of travel arrangements recorded a decline during Covid, group travel increased, rising from 20% before Covid to 23% during Covid. Similar results were noted for those who travelled with friends
- In both periods, hotel accommodation remained the most preferred by domestic tourists (45% and 36% respectively).
- Preference for staying with friends and relatives, resorts, game lodges and Airbnb increased during the Covid period indicating a preference for staying in less populated places or with trusted persons in terms of health status
- In terms of popularity of visitor attraction sites, the survey found out that nature-based attractions remain the most attractive to domestic visitors both before and during Covid. Indeed, before and during Covid 19, game viewing and visiting beaches remained the top popular activities for domestic tourists

Awareness and the effect of the tourism and travel safety and health protocols

- During the study period, a slight majority (43.5%) of the respondents were aware of the tourism and travel health protocols. On the other hand, 39.4% indicated that they were not aware of the protocols
- More males (46%) had knowledge of health and travel protocols than female respondents (22%).
- Majority (34%) of those who had knowledge to the health and safety protocols were aged between 35-50 years
- On the question of adherence to the travel health and safety protocols, the study found out that domestic tourists were aware and largely observed adherence to Kenya`s tourism and travel health and safety protocols

Motivations for and the future growth prospects for domestic tourism

Domestic travel during Covid-19 period was mainly motivated by

1) Planned travel (46.4%),
2) An opportunity presented by minimal crowds (31.2%), and
3) Sufficient health protocols (30.2%).

Other reasons included the availability of discounts, work related travel, and cabin fever.

Experiences of domestic tourists in Kenya

This study found out that both pre- and during Covid, majority of domestic tourists in Kenya rated their experiences with services offered by the tourism industry as either 'poor' or 'good' (in that order). This finding was similar to that of those who travelled both pre-and during covid, albeit with slight differences noted with experiences on different products. Further differences were also noted across the different demographics as can be noted below.

- In contrast to the other products where the percentage of those rating them as 'very poor' decreased during Covid, for accommodation and restaurants service,thisis percentage increased during Covid. The ratings were relatively higher for males across all scales of measurement with very poor leading followed by poor then good in both pre Covid-19 and during Covid-19 periods
- A combination of 'Poor' and 'very poor' ratings shows that more women than men rated services offered to domestic tourists as having deteriorated during Covid compared to before. In fact, the number of male respondents that rated the services as being 'poor' pre-Covid decreased during Covid. This demonstrates a difference in quality expectation between male and female domestic tourists with the latter being more sensitive to any change in quality.
- Perceived value for money was high both before and during Covid-19 (94.4% and 94.6% respectively). This was the case despite the respondents majorly rating the services and facilities offered as either 'poor' or 'good'.

NB: It is important to note that although the findings of this study gives an indication on what the experience of the domestic tourist market was before and during Covid, there is need to further probe into what informed the different experience ratings.

4.2 Recommendations for optimizing domestic tourism in Kenya

The coronavirus (Covid-19) pandemic has greatly impacted upon the tourism industry. While domestic tourism and international tourism are complimentary in nature, giving prominence to domestic tourism is now more important than before. Domestic tourism serves as a contingency strategy to a more comprehensive opening-up of the entire tourism sector. As an immediate priority, governments around the world are developing and implementing several initiatives targeted at promoting domestic travel and restoring confidence in the tourism sector. This section offers recommendations on initiatives that Kenya can pursue in her efforts to grow the domestic tourism.

Improve quality of tourism services and facilities. This study has found the perception of quality of tourism products and services in Kenya as being generally poor. There is need to enhance this quality to match the expectation of the domestic market, a sizeable percentage of whom have travelled to other destinations. Specific attention should be paid to accommodation facilities, restaurants and infrastructure within park roads. In addition, there is need to undertake capacity building of hotel and restaurant personnel in terms of customer services and general service delivery.

Improve access to tourism attractions and destinations. This study has found access to private cars and ability to access and afford air travel as leading modes of travel for domestic tourists. Related to this, noting that majority of domestic tourists were those earning less than KES 50,000 per month and thus less likely to own private cars, need exists that innovative measures be initiated to provide pooled tourist-public transport to enable majority of the local market to access attractions and destinations. A good example of such initiatives is the buses that were once being offered by Kenya Wildlife Services to ferry visitors to national parks. Another success is the Madaraka Train (popularly known as the Standard Gauge Railway) that has been credited with increased demand for domestic tourism in the coastal region of Kenya. Tourist ferries and affordable low cost carriers can also be a great boost to domestic tourism.

Enhance packaging of tourism products for families and groups. The study revealed a great preference by the domestic market for travel in families and groups. It would be essential that the industry focuses on formulating packages targeting families and groups. Respondents specifically identified the need for more all-inclusive value packages

Enhance marketing and promotion of Kenya's tourism products, services and facilities. There is need to undertake promotion campaigns to increase travel among domestic market. A number of measures can be used including advertisements, social media and other online platforms, print media, among others. Embracing digital and technological options such as virtual strategies and online offerings, to showcase and market destinations and experiences to stimulate demand and address a wider target audience has proven effective in a number of countries. Box 2 gives examples of countries that have used digital marketing campaigns to boost domestic tourism.

Box 2. Embracing digital and technological options to promote domestic tourism

Mexico is pursuing an ambitious digital strategy based on big data and social listening to boost domestic tourism. The campaign includes the participation of the 32 States and different municipalities to help build a narrative and strategic line of communication that ensures the content reaches the right audience. Furthermore, the Secretary of Tourism of Mexico (SECTUR) has also confirmed that the Tourist Tianguis (the main tourism fair in the country) has been postponed to March 2021, but with the novelty of being preceded by the first Digital Tourist Tianguis, in September 2020, where all States and – mainly – tourism service providers were able to offer their products and tourist packages, consolidating it as a driving force for internal tourism and the reactivation of the tourist value chain.

Portugal. Domestic tourism campaign #TuPodes (#YouCan) by Turismo de Portugal was announced inspiring the Portuguese travellers to visit the places that have made Portugal the world's best destination three years in a row. The campaign will be carried out in three phases. The first phase consisted in the launch of the new video #TuPodes with the second phase focused on the testimonies of tourism workers and the third phase on a digital platform, which will support the national campaign, but also the regional campaigns, compiling countless tourist experiences across the country. The visibility that will be given to the services of these companies will also boost the business fabric of the regions and support the marketing effort of these companies through offers specifically aimed at the national tourist who is not their usual customer

In Morocco a two-phase television campaign has been launched in Morocco linked to tourism led by the Moroccan National Tourism Office (ONMT for its name in French). The name of this campaign is #3lamantla9aw (Until we meet) and in its first phase aims to accompany Moroccans during the confinement and remind them about the beauties of their country. After the confinement, the campaign will inspire them to travel through Morocco.

Chile: Free online webinars and talks on tourism related issues.

Egypt Online tours of cities and attractions.

Source: UNWTO (2020)

Design market segment-based products and niche products. This will be in recognition of the different market segments that make up Kenya's domestic tourism market. As the findings of the study have demonstrated, domestic tourists of different demographic characteristics have different travel behaviour and preferences. In addition to the market segment-based products, diversifying into niche product offerings possesses the potential to boost tourism in the country, both domestically and even internationally. Consideration should be given to expanding, adapting or differentiating the country's tourism offerings into niche products that cater for the unique circumstances the Covid 19 pandemic presents. Presented in Box 4 below are some of the case studies of how destinations have applied these strategies to grow domestic tourism.

Box 3. Case studies of product diversification into niche product offerings to boost domestic tourism

United States, New York City has an official destination marketing organization and convention and visitors' bureau, NYC & Company. This is a Coalition for NYC Hospitality and Tourism Recovery (a group of entrepreneurs, organizations and cultural institutions that advise the Mayor's Office). The NYC revealed a tourism recovery roadmap which includes a series of initiatives that aims to diversity the city's tourism products and assist residents to reconnect better with the city they live in. Based on three stages – Rise, Renew, recover –, the initiatives envisioned aim is revitalization of New York City's tourism and hospitality industries. Across these three stages, messaging and tourism-friendly programs will target first hyper locals to metropolitan residents then, as conditions allow, will expand to regional and domestic international travellers.

Maldives, are using their unique, contained island geographical configuration to offer exclusive resort or island retreats for travellers

Antigua and Barbuda, are converting hotel accommodation into self-catering options to allay travellers' fears of virus transmission.

Mexico. Within its marketing and promotion efforts to strengthen domestic tourism, Mexico is promoting the 121 Magical Towns (Pueblos Mágicos) in the first Digital Tourism Tianguis (September 2020), consolidating it as a driving force for internal tourism. Its strategy will also focus on the boosting of road trips and the promotion of regional routes, such as the development of the long-term project the Maya Train, which would include the integration of tourism circuits that cover beaches, archaeological areas, museums, Magical Towns and cities declared World Heritage Sites.

Peru is diversifying its tourism products by placing focus on cultural tourism and protected natural areas, including among these the archaeological park of Machu Picchu and the network of Inca Roads, by encouraging free of charge access to some groups of nationals.

Source: UNWTO (2020)

The afore-noted initiatives must however be backed with sound marketing Intelligence Initiatives. This has been the case in some countries that have utilised forecasting and market insights on the behaviour and preferences of the domestic traveller in order to address the question of how domestic tourism should be better developed and promoted. Presented in Box 6 below are some of the case studies of how destinations have applied marketing intelligence to grow domestic tourism.

Box 4 Case Studies of marketing intelligence initiatives for domestic tourism

Argentina. The Minister of Tourism and Sports of Argentina announced the creation of an Observatory for Domestic Tourism. The objective is to have a tool that provides knowledge and understanding of the profile of the Argentine tourists, their preferences, interests, habits, needs and predisposition to travel. The Observatory would serve both to measure the impact of the current situation, as well as to favour a more comprehensive understanding of the structure of the Argentine tourist, in coordination with the private sector

Tourism Australia has developed a new online map to help Australians navigate domestic travel as restrictions continue to ease across the territory. The interactive map provides an overview of Australia's national picture, with click-through links to each state and territory for further advice, including the status of state borders, latest travel information and other helpful industry resources. It aims to be a useful and updated tool for Australians who wish to travel within the country.

China. In response to the situation and the travel restrictions imposed on international tourism, the Government of China conducted a market intelligence exercise to forecast the proportion of domestic tourism in the overall tourism demand.

Source: UNWTO (2020)

Implement measures to improve affordability of Kenya's tourism to a broader share of the local population. This survey identified cost of travel as one of the key bottlenecks affecting demand for domestic tourism in Kenya. It is therefore imperative that both the industry and government explores measures to make tourism affordable to a great majority of Kenyans. On the side of the government, such initiatives may include review taxes, charges, levies and regulations impacting the industry's major components (Box 3 highlights examples of government initiatives towards promoting domestic tourism from selected countries. On the other hand, the industry may need to pursue preferential pricing structures in favour of the domestic market.

Box 5. Examples of public sector initiatives towards promoting domestic tourism

• *Long weekends' and Travel Week*

Costa Rica approved a law to move all holidays of 2020 and 2021 to Mondays, in order for Costa Ricans to enjoy long weekends to travel domestically and to extend their stays in tourist destinations throughout the country, contributing to the reactivation of the sector.

South African Tourism's Domestic Tourism has an annual campaign that is aimed at getting South Africans excited about Domestic Tourism, and enjoying what the sector has to offer; known as Travel Week. During Travel Week different products are sold to the public at discounted rates. This strategy gets South Africans talking about Domestic Tourism and during this Covid-19 period, the campaign can be used to restore hope in the sector and get South Africans out of their homes and travelling safely to explore their respective provinces.

• *Use of holiday vouchers, bonus and similar schemes*

The **Greek** Government is allocating EUR 30 million (approximately USD 36 million) to subsidize holidays for citizens through the social tourism program Tourism for All, addressed to low-income groups. Eligible parties are those with EUR 16,000 (USD 19,000) of annual individual income and EUR 28,000 (USD 33,400) for family income. The program subsidizes half of a 4-night-stay in a hotel that is enrolled in the program and is expected to provide some 1 million overnight stays with 250,000 social tourism coupons being distributed to Greek citizens. Greece will also stimulate domestic tourism through a corporate or business holiday travel vouchers program worth EUR 300 (USD 360) which will be made available for private sector employees in order to encourage employees to travel.

Italy approved a Holiday Bonus (Bonus Vacanze) for families under certain conditions that would allow them to travel within the country and reactivate demand. The holiday bonus offers a contribution of up to EUR 500 (USD 600) for stays in hotels, campsites, holiday villages, farmhouses and bed & breakfasts in Italy. The beneficiaries are families with income of up to EUR 40,000 (USD 47,800) and the bonus amount depends on the number of family members (from EUR 150 to 500; USD 180 to 600). The holiday bonus will be downloaded and spendable in digital form only. The bonus will be usable to the extent of 80% in the form of an immediate discount for the payment of the services provided by the hotelier while the remaining 20% may be discharged as a tax deduction when filing the tax return by the member of the family to whom the stay is invoiced (with electronic invoice or commercial document). The discount applied to the guest in possession of the Holiday Bonus will be refunded to the establishment in the form of a tax credit that can be used in compensation without limit of amount, through a specific form. Alternatively, Fiscal incentives (VAT tax reduction, etc.) it can be transferred to third parties, including credit institutions and financial intermediaries.

In **Hungary,** the in-kind benefits system which employers may give employees in addition to their salaries (SZÉP Card) will allow for larger benefits: the SZÉP Card is issued by commercial banks, it works almost like a bank card, but can only be used for the services eligible (accommodation, catering and leisure-time). It has always been taxed at a preferential rate, but now the yearly amount which can be provided at this preferential tax rate is maximized with the ceiling almost doubled. In addition, payments to these accounts are treated even more preferentially between 22 April and 31 December 2020, as no social contributions have to be paid after them, only the income tax of 15%.

•In **Turkey** VAT rate on domestic flights was reduced to 1% from 18% for three months.

•**Zimbabwe.** The Government of Zimbabwe has approved the Tourism Sector Support Scheme which considers 6 measures to support the industry to face the effects of the Covid-19. One of the measures is a waiver of value added tax for domestic tourists in accommodations and tourism services. This will lower the total cost of holidays, making it more accessible for the domestic market. At the same time, the authorities are calling the private sector to analyse their cost structures and adapt for this market.

•**Rwanda** Development Board (RDB) introduced special packages for groups, families and companies on products for domestic tourists visiting volcanoes and Nyungwe National Parks. Gorilla permits were reduced from $1,500 uniform price to $200 for Rwandans and East African Community.

Source: UNWTO (2020)

Enhance partnership on promoting domestic tourism. Noting the interrelationship that exists in tourism and the fact that majority of the initiatives recommended above may be beyond the scope and affordability of a single institution of establishment, there is need for embracing greater partnership and collaboration to boost domestic tourism. In many countries, tourism authorities have partnered with other concerned national authorities (Ministry of Transport, Ministry of Finance, Ministry of Culture, etc.) to, for example, offer holiday vouchers and other incentives. National tourism administrations and national tourism organizations (NTAs/NTOs) have also partnered with municipalities and DMOs to: Develop new tourism products at destination level; Enhance and adapt the product offers at local level; Improve infrastructure in certain destinations; and Promote domestic marketing and initiatives. In some cases, municipalities are being considered as key partners for national tourism authorities since their specific experience and knowledge of destinations is providing relevant insights when it comes to the design of domestic tourism strategies at national level. Box 5 highlights some examples of countries in which partnerships at different levels have been embraced as a strategy to promote domestic tourism.

Box 6. Examples of partnerships to boost domestic tourism

Public to public partnerships

Destination **Canada** announced a new partnership with the provinces and territories to deliver locally-led marketing programs encouraging Canadians to discover their own back yard.

France, boosting coordination between national and regional levels, Atout France is organizing in partnership with the Regional Tourism Committees a strong digital campaign that involves influencers' visits to France throughout the summer.

In **Peru,** the Ministry of Foreign Trade and Tourism (MINCETUR) joined efforts with the Ministry of Culture and the National Service of Protected Natural Areas (SERNAP) to launch a series of incentives for public servants, children, adolescent and older adults, who will have free-of-charge access to archaeological sites, museums, historical places and natural areas of the country. A total of 55 cultural sites and 22 protected natural areas, including among these the archaeological park of Machu Picchu and the network of Inca Roads will benefit from this measure of reactivation and economic promotion of tourism within the country

Public to private partnerships

Finland's campaign 100 Reasons to Travel in Finland implemented by the Finnish Association of Tourism Organizations supported by the Ministry of Employment and the Economy (MEE), has led tourism operators around the country to join forces. Part of the Government's financing to domestic tourism will be allocated to increasing the visibility of tourism companies and their products and services in a special platform, with the objective of expanding the campaign to cover a larger number of small and medium sized tourism companies from all parts of Finland. To this end, all tourism companies serving the domestic travel and tourism sector will be able to participate in the extended campaign for a special participation fee of EUR 300 (USD 360) plus VAT.

The Republic of **Korea** collaborates with local governments and the private sector for its domestic tourism campaign Travel Week for which the Korea Tourism Organization (KTO) recommends tourist sites; and national travellers can benefit from discounts on attractions, transportations and accommodations that are part of the campaign.

Source: UNWTO (2020)

Boost the sector's capacity for product development and service delivery. It would be essential to boost the capacity of the tourism industry players to develop and deliver products to the domestic market. Cases exist of destinations that have widely adopted measures to enhance capacity building and training initiatives addressed to tourism stakeholders at large. In regard to domestic tourism, relevant and creative efforts are being made to build the capacity of tourism stakeholders. Among these initiatives, online training platforms provided by NTAs and NTOs offer a wide range of webinars and other online training tools on different topics, i.e., enhancement of professional skills development of frontline workers in direct contact with domestic tourists, creation and development of new tourism products aimed at the domestic market, strengthening the marketing chain with national travel agencies by deepening their knowledge of the national destinations and helping them sell domestic tourism experiences and destinations. Presented in Box 7 below are case studies of how this strategy can be adapted within a destination

Box 7. Case studies of Capacity Building and Training Initiatives

In **Chile**, SERNATUR organized a series of training activities under the theme Chile, tumejorapuesta (Chile, your best bet) that seeks to strengthen the marketing chain with national travel agencies by deepening their knowledge of the national destinations that will be promoted in a first stage of reactivation of tourism. The Undersecretary of Tourism has supported this initiative and jointly with SERNATUR the Government is also organizing regional roundtables with all tour operators throughout the country to explain these changes in trend and the importance of working with marketing channels to promote national tourism.

Tourism **Australia** has launched a free online training initiative for frontline travel sellers in Australia designed to equip agents with relevant up-to-date information and showcase new regions, destinations and experiences within Australia. The program offers interactive training modules, itinerary suggestions, fact sheets, latest industry news and monthly e-mail updates covering what's new in Australian tourism. The main goal is to help agents sell Australian tourism experiences and introduce domestic travellers to destinations and experiences they might be less familiar with.

Paraguay has organized a series of webinars called Tourist Destinations of Paraguay, aimed to showcase the different products and experiences that Paraguay has to offer in its 17 departments. Some of the presented segments included: nature (bird watching and fishing) and (eco) adventure tourism, rural tourism, cultural and gastronomy tourism (for example, the Yerba Mate Circuit), and a virtual trip through 22 national routes, detailing each national route and what people can find around the cities: historical, cultural, social, gastronomic sites, traditional festivals, emblematic buildings, diversity in nature, protected wild areas.

Source: UNWTO (2020)

Need for a further study: The study found that the overall experience rating by domestic tourists with the product offered by Kenya's tourism industry was generally low. The design of this study did not however, provide for the respondents to give views on what informed their perspectives on the quality of their experiences. In view of this gap, it is necessary that an in-depth study be conducted on the reasons for low rating of the domestic tourists' experience with focus on each specific product. This would be aimed at finding out the actual issues that need to be addressed by the specific sector players.

4.3 Action plan for implementing strategies for domestic tourism

The table 4.1 presents a prioritized action plan for implementing the above recommendations for growing Kenya's domestic tourism

Table 4.1: Action plan

Goal	Key Actions	Lead Agency	Other Actors	Priority		
				High	Medium	Low
Implement measures to improve affordability of Kenya's tourism to a broader share of the local population	Review the pricing of services for domestic tourism	MoTW	KATO, KAHC, KTB, KATA, KTF, KWS, Airlines, TRI,			
	Review Taxes, charges Levies and Regulations impacting domestic travel and key tourism components	MoTW	KTB, TF,TRA, MoE, KRA			
Improve quality of tourism services and facilities.	Improve quality of facilities and services offered by hotels and restaurants	TRA	TFC, KAHC, KTF, KUC			
	Undertake capacity building of hotel and restaurant personnel in terms of customer services and general service delivery.	TRA	TF, KAHC,KTF, Restaurant, KUC			
	Undertake in-depth studies into the key experience areas brought out by this study.	TRI	Industry stakeholders			
Improve access to tourism attractions and destinations	Improve infrastructure in parks and Games Reserves	KWS	County Govts / MoTW			
Focus and diversify the tourism product offering for the domestic market	Design segment- focused products	KTB	KATO, KAHC, KATA, KTF, KWS			
	Product diversification into niche product offerings to boost domestic tourism	KTB	KATO, KAHC, KATA, KTF, KWS			
	Enhance packaging of tourism products for families and groups.	KTB	KATO, KAHC, KATA, KTF, KWS			
	Formulate packages specifically for solo women travellers	KTB	KATO ,KATA, KAHC			
Enhance marketing and promotion of Kenya's tourism products, services and facilities	Formulate and implement targeted promotion campaigns for domestic tourism	MoTW	KTB, TRI, TRA, TF, TFC			
	Formulate marketing intelligence initiatives for domestic tourism	MoTW	KTB, TRI, TRA, TF, TFC, KATO, KAHC			
Forge greater partnerships in promoting domestic tourism	Enhance Public - public partnerships	MoTW	TRA, KATO, KATA, KAHC, KTF			
	Enhance Public to private partnerships	MoTW	TRA, KATO, KATA, KAHC, KTF			

Goal	Key Actions	Lead Agency	Other Actors	Priority		
				High	Medium	Low
Boost the sector's capacity for product development and service delivery to the domestic market.	Undertake capacity building for the tourism industry and destination managers for product development	MoTW	TRA, KATO, KATA, KAHC, KTF, KTB			
	Initiate training and professional skills development for tourism front line staff	MoTW	KATO, KATA, TRA, KAHC, KTF, KUC			

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