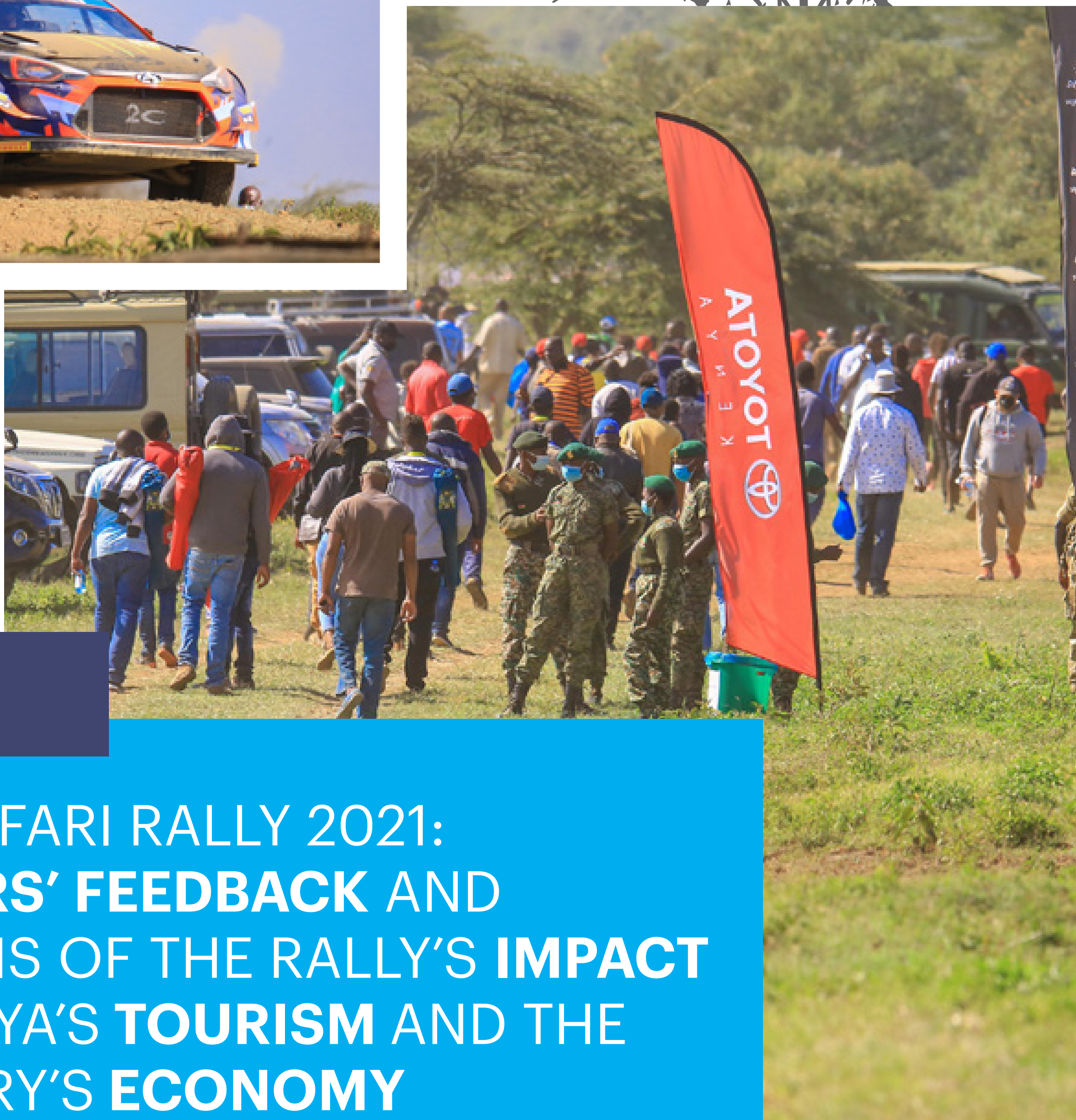
REPUBLIC OF KENYA

Tourism Research Institute

Magical Kenya



WRC SAFARI RALLY 2021: **VISITORS' FEEDBACK** AND ANALYSIS OF THE RALLY'S **IMPACT** ON KENYA'S **TOURISM** AND THE COUNTRY'S **ECONOMY**

JANUARY 2022

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TABLE OF CONTENTS

2

3

SAMPLE-BASED FINDINGS 22

List of Figures

List of Tables

List of Appendix Tables

List of Abbreviations and Acronyms

CGE	Computable General Equilibrium
GFCF	Gross Fixed Capital Formation
FTEs	Full Time Equivalent Employees
IBT	Indirect Business Taxes
ICT	Information and Communications Technology
I-O	Input-Output
ITE	Internal Tourism Expenditure
KPS	Kenya Police Service
KTB	Kenya Tourism Board
MRIO	Multi-Region Input-Output
MOTW	Ministry of Tourism and Wildlife
OPTI	Other Property Type Income
PhD	Doctor of Philosophy
SAM	Social Accounting Matrix
SRK	Safari Rally Kenya
TCC	Tourism Collective Consumption
TTID	Total tourism internal demand
TRI	Tourism Research Institute
TRA	Tourism Regulatory Authority
WRC	World Rally Championship

Key Terms and Definitions

Domestic tourism consumption- Domestic tourism consumption is the tourism consumption of a resident visitor within the economy of reference. Total consumption by a domestic tourist

Direct effect - production changes associated with changes in demand for the good itself; it is an initial impact on the economy.

Indirect effect - the secondary impact caused by changing input needs of directly affected industries (e.g., additional input purchases to produce additional output).

Induced effect - caused by changes in household spending due to the additional employment generated by direct and indirect effects.

Inbound tourism consumption- Inbound tourism consumption is the tourism consumption of a non-resident visitor within the economy of reference. Consumption by a foreign tourist within the country visited.

Internal tourism consumption - Internal tourism consumption is the tourism consumption of both resident and non-resident visitors within the economy of reference. It is the sum of domestic and international tourists' consumption. IMPLAN Employment is defined to include full and part-time annual average jobs for both employees and self-employed workers. Thus IMPLAN jobs look at all workers, regardless of their average hourly work week. Because this definition is based on annual average employment, seasonal workers are also accounted for in the Employment numbers, so if 12 hotel workers each worked six months of the year, they would account in IMPLAN for 6 annual jobs. This methodology differs from some data sets that look at the number of employees at any point-in-time within an industry

Labour Income is composed of two components. These are Employee Compensation –the wages and benefits paid to wage and salary employees, and Proprietor Income –the profits earned by self-employed individuals. Thus, labour income demonstrates a complete picture of the income paid to the entire labour force within the Model.

Matatu – A locally used term in Kenya to mean a minibus, especially one used to transport passengers commercially. Output is the value of production, and is equal to Value Added plus Intermediate Expenditures. Intermediate expenditure is the money spent in purchasing inputs (good and services) to create an industry's production. It can further be understood as the worth of business generated in the given industry for a given period.

Output multiplier for a sector is defined as the total production in all sectors of the economy that is necessary to satisfy a dollar's worth of final demand for that sector's output. Every dollar change in final-demand spending (direct output) changes the total value of output in all sectors. In other words, this multiplier measures the effects generated by an extra unit of final demand on the output of industries in an economy, where output is equal to sales plus the increase in the value of stocks.

Rally- is a form of motorsport that takes place on public or private roads with modified production or specially built road-legal cars. It is distinguished by not running on a circuit, but instead in a point-to-point format in which participants and their co-drivers drive between set control points (special stages), leaving at regular intervals from one or more start points. Rallies may be won by pure speed within the stages or alternatively by driving to a predetermined ideal journey time within the stages.

Safari Rally - The Safari Rally is a rally race held in Kenya. It was first held from 27 May to 1 June 1953 as the East African Coronation Safari in Kenya, Uganda and Tanganyika, as a celebration of the coronation of Queen Elizabeth II. Tourist – A person travelling to and staying in places outside their usual environment for at least a night and no more than one consecutive year for leisure, business and other purposes, other than taking up employment.

Tourism Expenditure - Tourism expenditure refers to the total consumption made by a visitor, or on behalf of a visitor for goods and services during his/her trip and stay at the destination place (country). It also includes payments in advance or after the trip for services received during the trip.

Tourism Product - A combination of tangible and intangible elements, such as natural, cultural and man-made resources, attractions, facilities, services and activities around a specific center of interest which represents the core of the destination marketing mix and creates an overall visitor experience including emotional aspects for the potential customers. A tourism product is priced and sold through distribution channels and it has a life-cycle.

Tour Operator – This is a tourism company which arranges and assembles tours that are sold through travel agencies or directly to tourists. The tours may include any or all of the following: transportation, accommodation, food, visits to national parks, museums, historical or cultural sites, theatrical, musical or sporting events.

Total tourism internal demand (TTID) - Total tourism internal demand, is the sum of internal tourism consumption, tourism gross fixed capital formation and tourism collective consumption. It does not include outbound tourism consumption.

The income multiplier measures the relationship between the direct and total income earned by households as generated by a unit of final demand i.e. additional 'compensation of employees' paid to workers producing the extra output

The value-added multiplier measures value added at factor cost due to the change in output as generated by an extra unit of final demand. It relates to the additional value-added, which is the sum of the compensation of employees, GOS and mixed income, and taxes less subsidies.

The employment multiplier measures the ratio of direct and secondary employment to direct employment generated by an additional unit of final demand. This multiplier is usually expressed in terms of an increase of 'N' full time equivalent employees (FTEs) per million dollars of extra spending. In other words, for every million-dollar change in final-demand spending (direct output), the change in employment (jobs).

Total Effects - total multipliers include the full range of flow-on effects generated by an increase in economic activity. Thus, the total output multiplier is the total amount induced by the requirement from all industries to produce output to satisfy the demand for an extra dollar of output from an industry, and by the spending of the extra wage and salaries earned from producing the output by households (consumers).

Value Added is the combination of Labour Income, Other Property Type Income and Indirect Business Taxes. Other Property Type Income (OPTI) includes corporate profits, interest income, and rental payments, while Indirect Business Taxes (IBT) is taxes collected by businesses on behalf of the government. These include sales tax, excise tax, property tax, fees, fines, and licenses. Hence, Value Added accounts for all non-commodity payments associated to an industry's production.

Visitor - A visitor is any person travelling to a place other than his/her usual environment and staying there for not longer than one consecutive year and whose main purpose of travel is other than the exercise of an activity remunerated from within the place visited. The term visitor (domestic and international) comprises tourists and same-day visitors.

Executive Summary

The primary objective of this study was to establish the extent of visitor satisfaction and evaluate the impact of the Rally on the economy of Kenya during June-July period in 2021. Specific objectives of the study were to: determine the demographic characteristics of respondents; establish the sources of information, search habits; and awareness about destination Kenya; establish the visitors' satisfaction levels with various destination Kenya attributes; and to determine tourism products and service strengths and weaknesses, and potential for repeat visitation; establish the impact of the rally on Kenya's tourism and the economy.

The survey was conducted using a structured questionnaire for the qualitative data while IMPLAN software was used to do the economic analysis based on Kenya's input output table. The input-output/Social Accounting Matrix (SAM) models were used to estimate the impacts and linkages of tourism in terms of output production, employment generation, labor income earnings and total value creation. Data for analysis was sourced from multi-region input-output table (MRIO) database: http://www.worldmrio.com/ and the Kenya Tourism Satellite Account (2019).

Multipliers were used to analyze the impacts and effects of changes in tourism demand as a result of the motor rally event. There are several different types of multipliers depending on the secondary effects included and the measure of economic activity used. The common multipliers computed were associated with output, income, value addition and employment in the economy.

It is noteworthy that all impacts have a starting point in the economy that is defined as direct effects. These effects set off iterations of indirect (inter-industry production) and induced (labour) spending.

The findings showed that the overall satisfaction level almost 93.6% of visitors cited that they were satisfied with the experience of WRC while 6.4% indicated they were not satisfied. Additionally, most of the visitors (97.8 %) cited that they would recommend future rallies to their friends, relatives or colleagues at home while 2.2 % of visitors stated that they would not recommend future Rallies to their friends, relatives and colleagues.

Overall impacts analysis indicated that Total Tourism Internal Demand (TTID) expenditure of Kshs. 8,258 million in June- July 2021 period supported 24,758 full time equivalent jobs and generated Kshs. 3,757 million as labour income, nearly Kshs. 9,610 million in value addition and Kshs. 15,780 million as output. Same day and overnight visitors from outside the country spent an equivalent of Kshs.1.35 billion due to the motor rally event.

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CHAPTER ONE

INTRODUCTION AND BACKGROUND

1.1 Introduction

Rallying is the most famous and oldest sport in Kenya. Safari Rallies were introduced in the year 1953. Initially, the East African Coronation Safari in Kenya, Uganda and Tanganyika was marked as a celebration of the coronation of Queen Elizabeth II. In 1960 it was renamed the East African Safari Rally and retained that name until 1974, when it became the Kenya Safari Rally. The Safari Rally Kenya was relegated from the World Rally Championship series in 2002. The 2021 Safari Rally series marked the first time in 19 years a World Rally Championship car touched down on Kenyan soil (WRC, Kenya Website). Consequently, it was evident that an event of this magnitude will definitely put Kenya on the map.

The WRC Safari Rally being a global sports tourism event, it was paramount for the Ministry of Tourism through the Tourism Research Institute to assess and document its economic impacts on the tourism sector and its contribution to the Country's economy at large. Moreover, by virtue of the Rally being held in Kenya, it was a great opportunity for the country to boost its brand image as a top-notch tourist destination through;

- Showcasing the country as a sports tourism destination and promote more sporting disciplines.
- Showcasing geographical features such as the snow-capped mountains, the Great Rift Valley, Coastal sunny and sandy beaches
- Offering young talented drivers the opportunity to race against the best in the world and open up opportunities for them to be recognized and tap into the multi- billion-dollar industry through endorsements as a form of creating employment for them.
- Exposing the country's potential for investment especially for large car manufacturers to open assembly plants for vehicles and plant.
- Showcasing Kenya's organizational skills and provide further international exposure and experience in hosting high-profile events which will conversely bring in new tourist arrivals, promote global arts, sports and culture, events tourism and Kenya as a BRAND.
- Re-creation of the public enthusiasm, national cohesion and feel good factor for the country basking in international limelight during the WRC Safari rallies of the past.
- Provide insights and interest of the youth to embrace technology- based courses in ICT, mechanical and electronic engineering derived from automotive engineering in universities
- Attract sponsorship and investment from large corporations for young drivers with a multiplier effect of using them to promote local and international products through forums offered by the Safari and motor racing in advertising.

1.2 Background of the study

The Safari Rally has for decades been a much-loved, adventurous activity in Kenya's history. It has always been an exciting experience to watch local and foreign drivers fight it out in an epic and grueling battle on long, dusty, rocky roads in picturesque scenery with wildlife freely roaming across the terrain. It's the only African round in the World Rally Championship calendar and one of a few global motor racing events that have historically taken place on the continent. Others that have been globally recognized are such as; the Dakar Rally, which after almost three decades was moved out of the continent in 2008 due to terror threats in Mauritania; and the South African Grand Prix, which was part of the Formula One circuit until 1993 when it was discontinued due to financial problems (Carlos M. 2021).

The World Rally Championship (WRC) returned to Kenya after a 19-year hiatus from the continent, giving Kenyans a nostalgic experience in the country's first major international sports competition since the beginning of the Covid-19 pandemic. Tourism Research Institute having been mandated to undertake and co-ordinate tourism research and analysis in the country as established by an Act of Parliament (Tourism Act 2011) conducted this survey on the impacts of the Safari Rally event to the country's economy. The Institute is envisioned to undertake sound research so as to provide meaningful information and analysis to policymakers, tourism business owners, and other players in the sector by collecting, analyzing, publishing and disseminating findings.

1.3 Rationale of the study

Sports events are a positive, rewarding way to generate local business, stimulate tax coffers, and shine a regional or national spotlight on a host destination. Hosting such a sporting event at such a time when communities are facing harsh economic crisis as a result of the Covid19 pandemic can help boost the local economy. Many sports events, facilities, and franchises are subsidized either directly or indirectly by investments from public sector funds. Therefore, there was need for the Tourism Research Institute to carry out a survey on the economic impact analysis of 2021 WRC Safari Rally. In addition, the survey aimed at gauging the levels of visitor satisfaction so as to enhance service delivery in future for destination Kenya.

1.4 Objectives of the study

The survey was designed to:

i. Determine the demographic characteristics of respondents, including; nationality, country and county of residence, gender, age and education
ii. Establish the sources of information, search habits, and awareness about destination Kenya; motivation and decision-making process
iii. Establish tourist trip characteristics such as length of stay, mode of accommodation, tourist activities undertaken, size of the travel party and booking mode
iv. Establish visitors' satisfaction levels with various destination Kenya attributes including attractions, amenities, accommodation, accessibility and quality of services
v. Assess the economic impact of the rally on Kenya's tourism and the country's economy
vi. Determine tourism products and service strengths and weaknesses, and potential for repeat visitation
vii. Generate recommendations and lessons learned.


DREW
ONKAR
Aquamist
WRC+ ALL LIVE
T.S.R
T.S.R
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Mineral Water
magical Kenya
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TOW

CHAPTER TWO

METHODOLOGY

2.1 Introduction

This section describes the methodology adopted for the study. The section describes the target population, sample size, data type and data collection techniques used.

2.2 Data Type

The survey used both primary and secondary data. Primary data was digitally collected by use of programmed online questionnaire, which required both qualitative and quantities data. Secondary data was sourced from different organizations and agencies which were mandated to either host the rally, organize, participate or facilitate event's success. These include and not limited to WRC Kenya, Kenya Airways, Nakuru County Government, Kenya Railways and Toyota Kenya. The survey was undertaken in the month of June 2021 to October 2021 within which the two sets of the data were collected.

2.3 Target Population

The Safari Rally Kenya (SRK) event received an approximate population of 100,000 people. The target population were the visitors who travelled to Naivasha sub-county, Nakuru County to experience the Safari Rally Kenya Event.

2.4 Sample Size and Sampling

A sample size of 3700 visitors was considered fit for the survey. Respondents were selected based on convenience and eligibility to participate in the study. Each questionnaire took approximately 10-15 minutes to be fully completed.

Additionally, for ethical considerations, respondents were assured of the confidentiality of their responses, by highlighting that (i) all individual responses would only be viewed by the researchers, (ii) that responses would be destroyed upon entry of the questionnaire data into the system, and (iii) omitting names from the self-administered questionnaire.

Out of the total of 3,700 questionnaires that were administered, 3,100 were successfully filled and returned representing 83.9% response rate.

2.5 Data Collection

Data collection was done through various methods namely;

i. The Institute employed an online survey platform which was accessed by spectators/participants via a QR (Quick Response) code and an online link.
ii. The Institute identified and trained Research Assistants (RAs) who were deployed at the various spectator stages and accommodation facilities to sensitize the rally participants/attendees to participate in the survey.
iii. To further popularize the questionnaire and enhance responses, the QR code and the online link were embedded to various social media while also using a social medial influencer.
iv. Additional information was sought from the various public and private sector agencies involved in the rally in various ways including the organisers, competing team sponsors, marketing agencies, infrastructure and security agencies, service providers, venue owners among others.

2.6 Research instruments

The methodological process and activities involved the use of structured questionnaires, data analysis and report writing. The questionnaires were administered digitally through a QR code with the main focus being the participants/spectators at Naivasha/Nakuru County the rally zone. The questionnaires were designed to collect information on tourists' demographic characteristics; trip characteristics; overall expenditure; experiences and satisfaction; and future intentions.

The questionnaire was divided into four (4) sections (Appendix 6.1) as shown in Table 2.1 below.

Table 2. 1: Sections of the questionnaire adopted for the study

Section	Description
Section A	Visitors demographics (questions 1 – 5) sought to establish; the nationality, country of residence, age, gender, and level of education of inbound tourists to Kenya. Without these questions it will be difficult to draw any conclusions on the Who
Section B	Trip characteristics (questions 6 – 14) sought to establish; visitors' travel behavior, purpose of visit, length of stay, destination information sources, mode of transportation, tourism products and activities. This establishes for example why they choose Kenya. We need to know who is attending the rally as their international event/sport expenditure is of relevance to the Kenyan economy.
Section C	Estimated visitor's expenditure (questions 15 – 18) sought to determine; whether the visitor was on independent or inclusive package arrangement; overall expenditure, and expenditure on targeted items.
Section D	Future intentions (questions 19 – 23) sought to establish overall visitors experience, perceptions and behavioral intentions.

2.6.1 Main survey questions and sub questions

The section below as shown in table 2.1 provides a highlight of the main and sub-survey questions adopted for the study.

Table 2. 2: Main and sub survey questions

Main Survey questions	Information captured through Sub questions
1.1 What were the demographic characteristics of visitors consuming destination Kenya?	The sub questions captured tourists; • Nationality • Country of residence • Gender • Age • Level of education
1.2 What were the tourists' trip characteristics?	The sub questions captured; • Purpose of visit, • Size of travel party, • Mode of transport used, • Accommodation used, • Activities undertaken, • Visitors' length of stay, • Sources of destination awareness, • Mode of booking
1.3 What was the estimated tourists' expenditure?	The sub questions addressed expenditure on; • Transport and parking • Accommodation • Food and drinks • General shopping • Entertainment: • Tickets: • Souvenirs Overall expenditure in Kenya
1.4 Were tourists satisfied with their visit?	The sub questions addressed tourists; • Interests • Expectation, • Perceptions/experience, • Overall satisfaction, • Revisit intentions, • Improvements that tourists feel are important.

2.6.2 Procedure for Monitoring and Evaluation

The project activities were reviewed on regular intervals to ascertain progress and usage of project resources. The monitoring process involved the use of action plans designed with activities, indicators and input as shown in table 2.3 below.

Table 2. 3: Survey activities and indicators

Activities	Indicators	Output
Literature Review & Document Analysis	✓ Type of Information (Quantitative and Qualitative) ✓ Sampling Method ✓ Sample Size	Creating a survey plan
Preparation of Survey Instruments	✓ Type of Information ✓ Sampling Method ✓ Sample Size	Appropriate survey type for use
Training of RAs	✓ Ability to understand ✓ Length of Instrument ✓ Answers Provided	Review of Instrument
Data collection	✓ Response rate ✓ Nature of information	Supply of Questionnaires, interviews schedule and supporting research instruments such as identification letters
Data Analysis and Evaluation	Data entry	Coding & Imputing data collected Quality & Accuracy Check
Report Writing	Client/ the objectives	Identifying priority recommendations and practical action plan
Report presentation	Client/ the objectives	Sharing the report

2.7 Economic Impact Methodology

The economic impacts of tourism can be estimated using economic models that identify and quantify the linkages between different sectors of the economy. The relationship between expenditure and output, and income and employment (direct, indirect and induced) can be described by multipliers. Tourism industry is related with several other industries in the economy. Both tourism demand and supply forces create primary (direct) and secondary (indirect and induced) economic effects. The standard approach is to estimate the economic impacts of tourism by using Input-Output models (1-0), Social Accounting Matrix (SAM) and/or Computable General Equilibrium (CGE) models. Input-Output and Social Accounting Matrix (SAM) models are adopted in analyzing the resultant economic impacts of WRC Safari Rally Kenya June, 2021.

2.7.1 Data Analysis

Two inputs are required to assess economic impacts of tourism expenditure; a set of multipliers corresponding to tourism specific industries and a measure of tourism demand changes appropriately disaggregated and matched with corresponding industries. These inputs were obtained from the following data sources:

2.7.2 Kenya's Input-Output Table

The study relies on Kenya I-O table available at http://www.worldmrio.com/country/ that contains multi-region I-O tables (MRIO) for 190 countries including Kenya.

2.7.3 Kenya's Social Accounting Matrix (SAM)

SAM captures an economy's expenditure and income linkages and is derived by modifying the appropriate I-O table. Input-Output table, public sector accounts, national income accounts and balance of payments are used to construct SAM. SAM methodology focuses on induced effects besides the direct and indirect ones, giving it some advantages over the I-O modelling methodology.

2.7.4 IMPLAN Software Package

IMPLAN Software package (https://implan.com), frequently used for tourism impact studies, was adopted for current analysis.

2.7.5 Multipliers

Visitors directly spend on accommodation, food/drinks, transport, reservation services (for instance, tour agencies and operations) and attractions (mainly, nature and culture-based). Tourism commodity producers receive revenue as a result of this expenditure (direct effects). The revenue helps in covering costs such as wages/salaries (labour), rent (land), interest (capital) and profits (enterprise). In addition, tourism commodity producers purchase inputs from other sectors in the economy in order to meet the demand by tourists (indirect effects). Tourism wage earners spend their income on goods and services produced, to a large extent, within the economy (creating induced effects). Total effects, resulting from multiplier operations, can be decomposed into direct, indirect and induced components.

There are several different multiplier impacts depending on the secondary effects included and the measure of economic activity used. Common multipliers used refer to output, income, value added and employment.

CHAPTER THREE

SAMPLE-BASED FINDINGS

3.1 Introduction

This section provides the findings based on the survey objectives. The findings were presented in form of sub-sections based on the variables that the survey sought to assess.

3.2 Visitors Demographic and social economic characteristics by Counties

As indicated in figure 3.1, most of the visitors 52.4% which is more than half of the total attendance were from Nairobi region. Rift valley region was ranked second with 21.5%, Central region 15.3%, coastal region 4.0% and Eastern region 3.7%. Nyanza region and Western region were ranked last as 1.9% and 1.2% respectively.

KENYAN REGIONS	Number Of Participants	Percentage of Participation
Central	237	15.13%
Coast	63	4.02%
Eastern	58	3.70%
Nairobi	822	52.49%
Nyanza	30	1.92%
Rift Valley	338	21.58%
Western	18	1.15%

Figure 3. 1: Distribution of Visitors by Regions

3.2.1 Gender and Age Distribution of Visitors

The survey sought to assess the gender and age distribution of the visitors to the Rally. Figure 3.2 indicates that gender was distributed in the ratio 6:4 with 60.4% of the attendees being female and 39.6% of the attendees being male.

In terms of age distribution, the findings demonstrate that most of the visitors were aged between 24 –34 with an attendance representation of 51.8% while the least were visitors aged 65 and above represented by 0.1%.

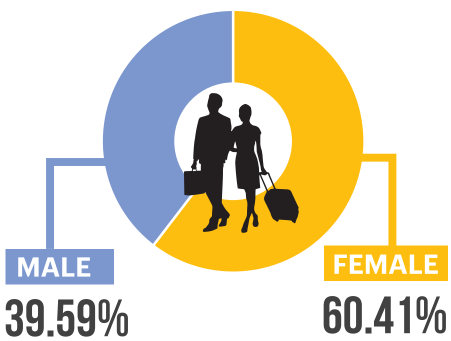

Figure 3. 2: Gender distribution

AGE RANGE	Number Of Participants	Percentage of Particpation
18-24	447	28.54%
24-34	811	51.29%
35-44	213	13.60%
45-54	77	4.92%
55-64	13	0.83%
65 and above	2	0.13%
Under 18	3	0.19%

Figure 3. 3: Distribution of visitors by age

3.2.2 Visitors' distribution by education

As shown in Figure 3.4, most of the visitors (65.6%) had attained university degree while those with Masters / PhD were ranked second with an attendance of 14.8%. Middle level colleges were represented by 12.9% while those who indicated to have attained high school education had a representation of 5.8%. The least rank was held by diploma and college qualifications, with 0.1% each.

DISTRIBUTION BY EDUCATION	Count	Percentage of Distribution
College	1	0.06%
Diploma	4	0.26%
High School	91	5.81%
Less than High School	7	0.45%
Masters or Ph.D	232	14.81%
Middle Level College	202	12.90%
Postgraduate professional Qualification	1	0.06%
University Degree	1,027	65.58%
University Diploma	1	0.06%

Figure 3. 4: Distribution of visitors by Education

3.2.2 Distribution of visitors by Nationality

Figure 3.5 shows that most of the visitors who attended the WRC Safari Rally were Kenyans with a representation of 98.9%. Europeans were 0.4% while other African countries had 0.3% representation. America and Asians were ranked the least in attendance with 0.2% each.

NATIONALITY	Count	Percentage of Distribution
American	6	0.20%
Asian	6	0.20%
European	12	0.40
Kenyan	2,978	98.87
Rest of Africa	10	0.33

Figure 3. 5: Distribution of visitors by Nationality

3.3 Trip Characteristics

3.3.1 Introduction

The survey sought to examine the trip characteristics of the visitors by determining: the travel purpose; length of stay; source of information; travel arrangements; mode of transport used; visitors participating in other activities as well as type of accommodation used. The findings are presented below.

3.3.2 Travel purpose

The study observed that most of the visitors who attended the rally event were spectators accounting to 77.3% as indicated in figure 3.6. The rally teams ranked second with an attendance of 17.1%. The media and organizers accounted for 5.6%.

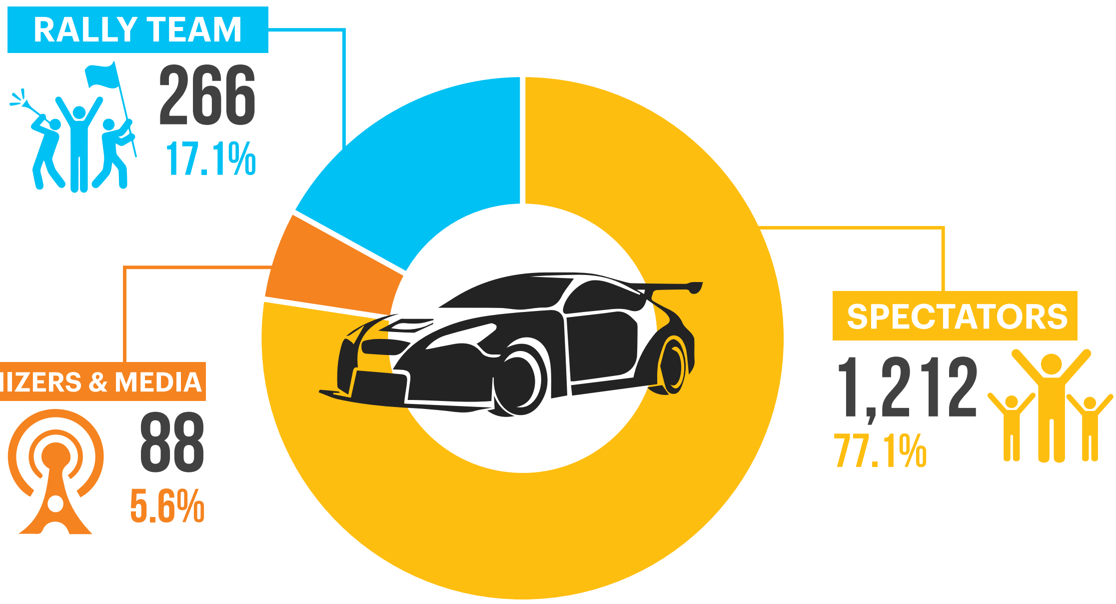

Figure 3.6: Travel party composition

3.3.3 Length of stay

As indicated in figure 3.6 most of the visitors (99.6%) stayed for less than 10 days while 0.05% spent between 10-20 days. Only 0.02% stayed between 30-40 and 40-50 nights. Rally event organizers stayed for up to 50 days which is recorded to be the maximum number of days stayed by a visitor. It was also observed that members of the rally teams stayed between 10 to 40 days during the rally period.

Night Range	Count	%Count
0-10.0	1,559	99.55%
10-20.0	5	0.32%
30-60.0	1	0.06%
40-50.0	1	0.06%

Figure 3.7: Number of nights spent by visitors

3.3.4 Source of information

The study revealed that most visitors acquired information about the rally through social media accounting to 53.5% as shown in figure 3.8. However, about 17.8% of the visitors received the information from friends and family while information obtained from print/electronic media accounted for almost 13.5%. Those who obtained information from the Kenya Tourism Board accounted for 10.2% while those who relied on travel agencies represented 5.0%.

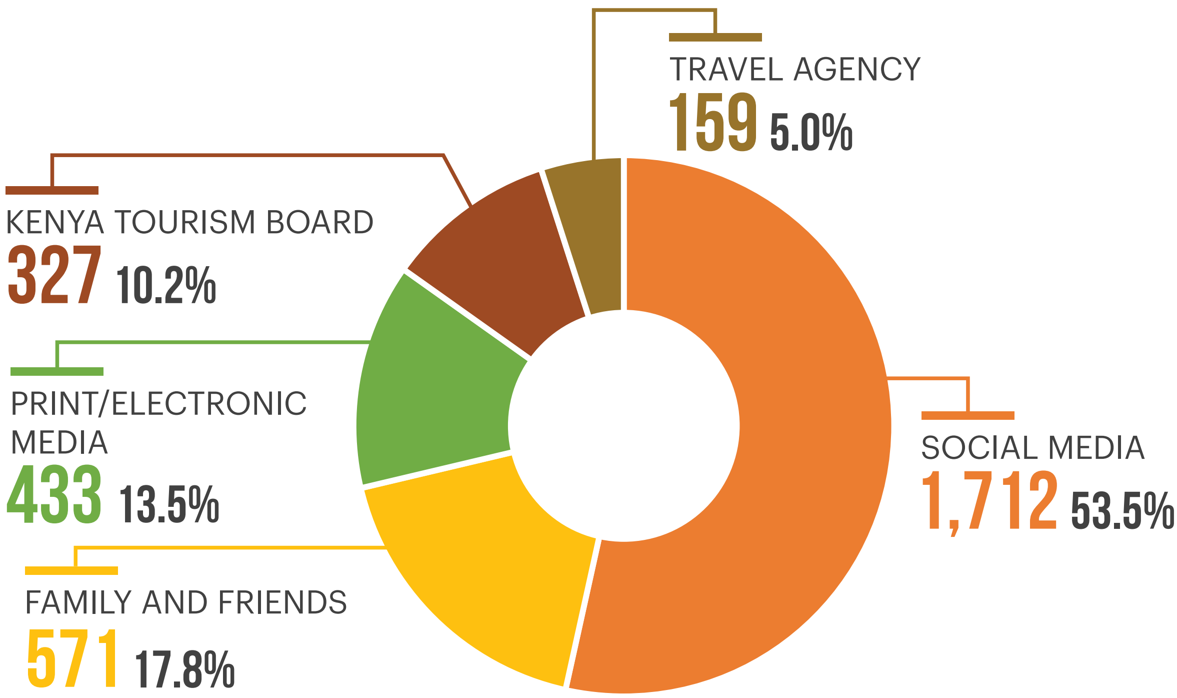

Figure 3.8: Information Source

3.3.5 Travel arrangements

Most of the visitors made self-travel arrangements accounting to 51.5%. Travel agencies in Kenya were ranked second with a contribution of 36.1% to visitor's travel arrangements. The rally team was ranked the least in contribution to travel arrangements for visitors at 0.5% as shown in figure 3.9.

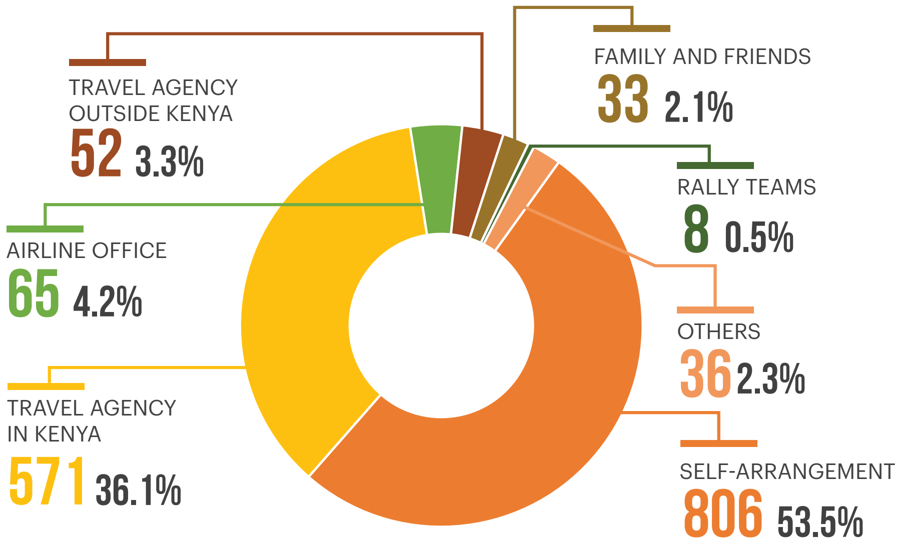

Figure 3.9: Travel Arrangements

3.3.6 Prior Arrangements

The highest number of visitors decided to participate in the rally less than two weeks before the trip (51.7%) followed by 1-5 months before the trip (17.4%), less than one month before the trip (14.9), 6-12 months before the trip (9.4%) and lastly more than 1 year before the trip (14.9) as shown in figure 3.10.

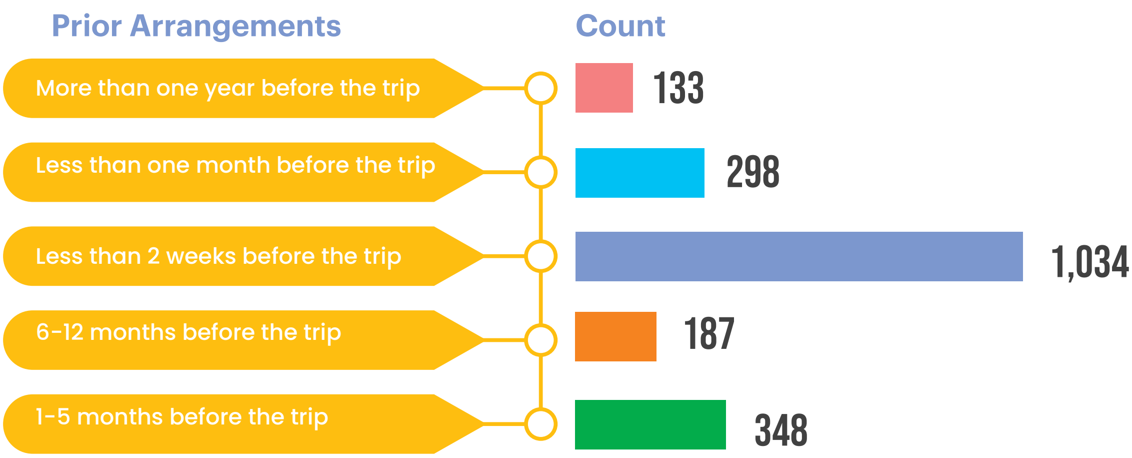

Figure 3. 10: Prior arrangements

3.3.7 Main transport mode to the rally

As indicated in figure 3.11, most of the visitors (84.5 %) used road as transportation mode to the rally destination. However, 14.4% of the visitors travelled by air, 0.7% used railway transport and 0.4% used water transport.

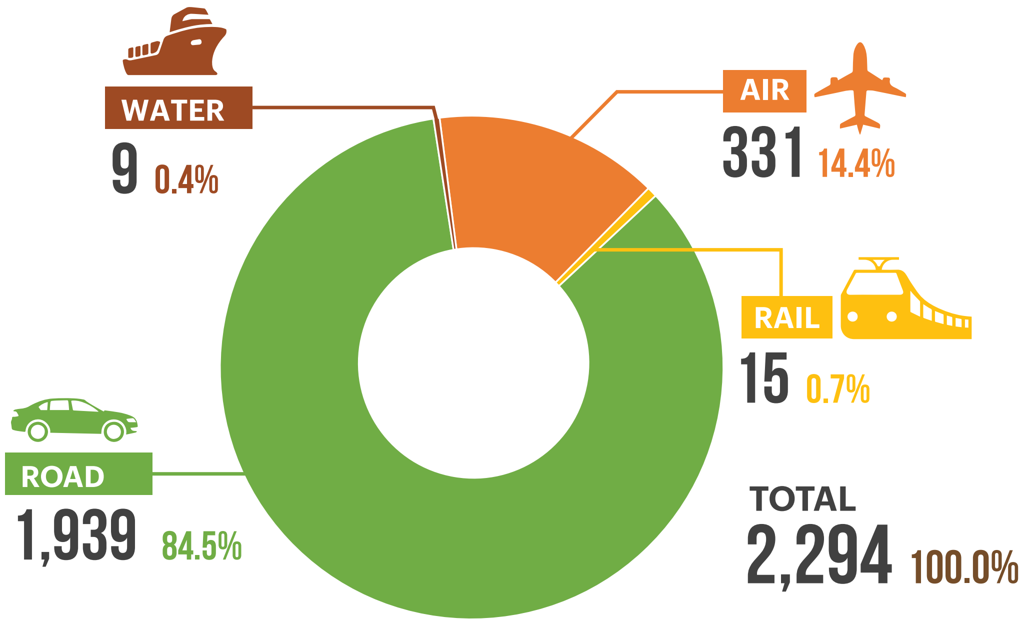

Figure 3.11: Main Transport Mode to the Rally

3.3.8 Transport mode used within the Rally-Destination

Figure 3.12 indicates the mode of transport that visitors used within the Rally destination. Most of the visitors (76.6%) used private cars for transport, while 9.8% were walking. Those who used tour vehicles accounted for 7.0%, motorcycles 3.3%, movement by bus accounted for 1.7%, and transport by air 0.6%. Any other means of transport was accounted for by 1.0%.

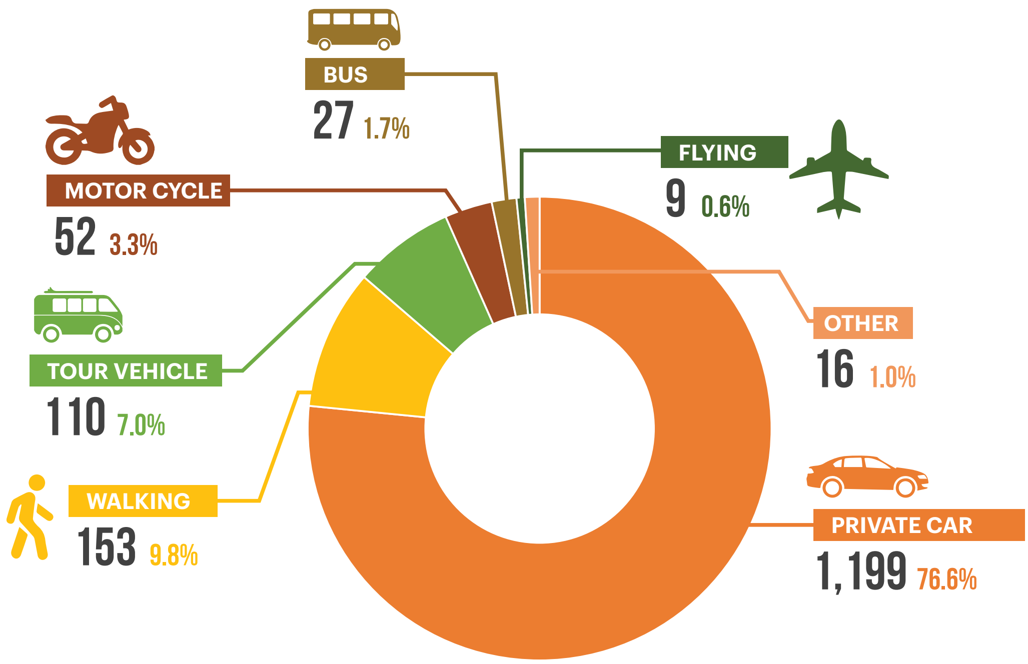

Figure 3.12: Transport mode used within the Rally Destination

3.3.9 Visitors participating in other activities

It is observed that aside from watching the rally, visitors also participated in other activities majorly sightseeing, wildlife viewing and shopping hosting 28.3%, 21.9% and 20.7% of visitors respectively. 2.7% of the visitors visited historical sites as the least (2.4 %) went for Mountain climbing and attended conferences as indicated in figure 3.13.

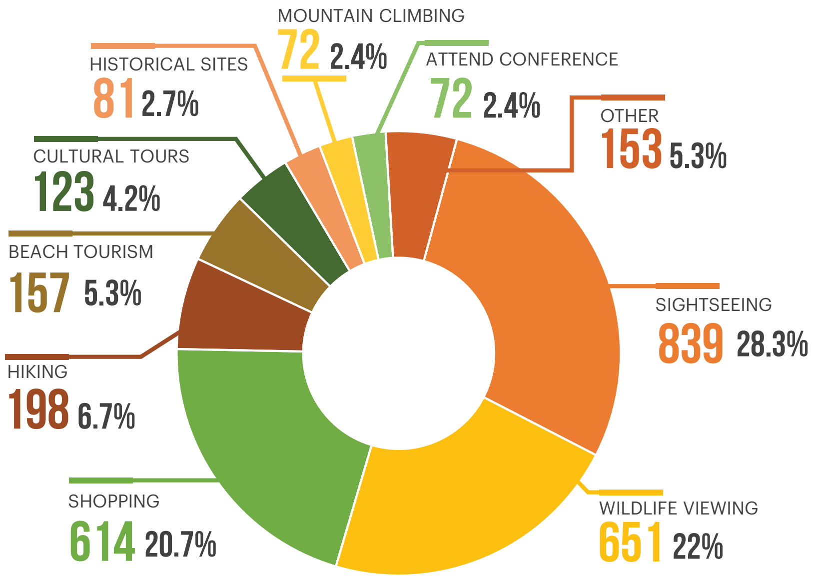

Figure 3.13: Visitors participating in other activities

3.3.10 Accommodation type

It is observed that aside from watching the rally, visitors also participated in other activities majorly sightseeing, wildlife viewing and shopping hosting 28.3%, 21.9% and 20.7% of visitors respectively. 2.7% of the visitors visited historical sites as the least (2.4 %) went for Mountain climbing and attended conferences as indicated in figure 3.14.

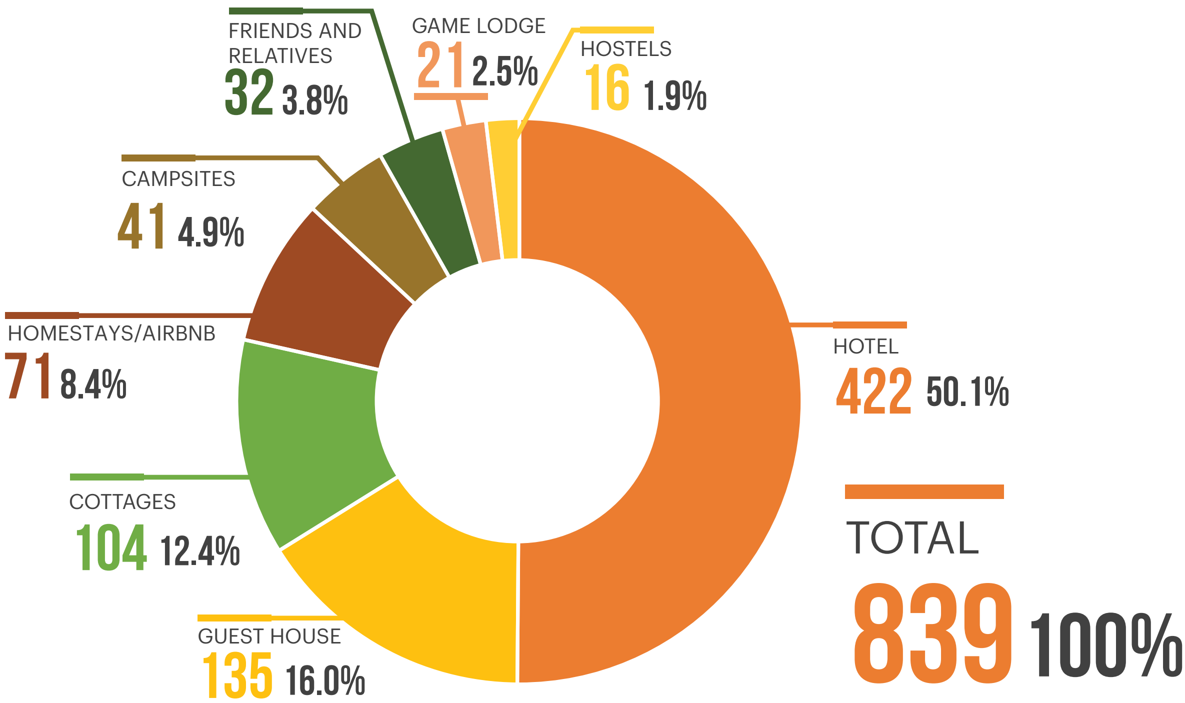

Figure 3.14: Accommodation type

3.4 Satisfaction Levels

Table 3.1: Satisfaction level on accommodation, amenities, rally organization, routes used and accessibility

Satisfaction Level	Accommodation		Amenities		Rally Organization		Routes Used		Accessibility	
	Freq	%	Freq	%	Freq	%	Freq	%	Freq	%
Dissatisfied	12	5.1%	23	9.8%	10	4.3%	13	5.5%	25	10.6%
NA	25	10.6%	19	8.1%	17	7.2%	17	7.2%	27	11.5%
Satisfied	73	31.1%	61	26.0%	58	24.7%	65	27.7%	42	17.9%
Somewhat dissatisfied	17	7.2%	34	14.5%	27	11.5%	20	8.5%	34	14.5%
Somewhat satisfied	49	20.9%	42	17.9%	43	18.3%	51	21.7%	39	16.6%
Very dissatisfied	18	7.7%	18	7.7%	18	7.7%	20	8.5%	34	14.5%
Very Satisfied	41	17.4%	38	16.2%	62	26.4%	49	20.9%	34	14.5%
Total	235	100%	235	100%	235	100%	235	100%	235	100%

3.4.1 Overall Satisfaction Level

When asked about the overall satisfaction level almost 93.6% of visitors cited that they were satisfied with the experience of WRC while 6.4% indicated they were not satisfied as indicated in Figure 3.15.

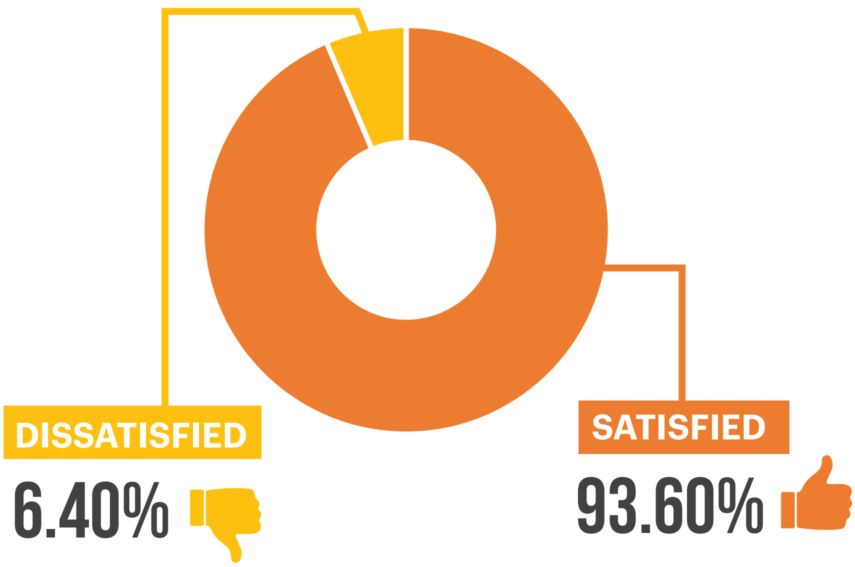

Figure 3.15: Satisfaction levels

3.4.2 Recommendation to friends

As shown in figure 3.16, most of the visitors (97.8 %) cited that they would recommend future rallies to their friends, relatives or colleagues at home while 2.2 % of visitors stated that they would not recommend future Rallies to their friends, relatives and colleagues.

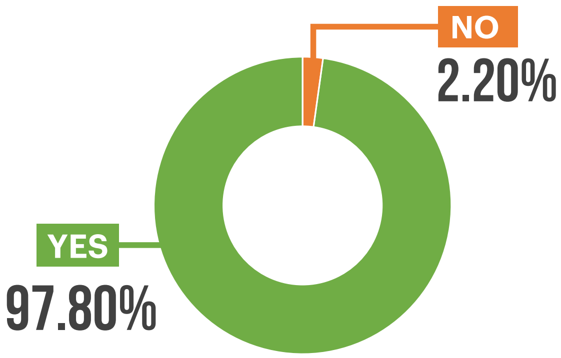

Figure 3.16: Recommendation to friends

3.4.3 Worst disappointments within the Rally Zone destination

The following are some of the disappointments that were brought forward by the visitors within the rally zone destination.

- No measures were taken to avoid crowding that could spread Covid-19.
- Not enough spectator zones.
- Lack of adequate toilet facilities.
- Long wait in Traffic and closed roads to spectators.
- No TV live stream available to Kenyans.
- Lack of knowledge by stewards on how to handle spectators.
- Poor mobile phone network.
- Lack of enough food and water outlets.
- Marshalls were disorganized
- No signage for direction, Spectator stages unorganized and park entry disorganized.

  Dusty roads.

3.4.4 Suggestion on what the Rally Team should have done to enhance current experience

The following suggestions were given by the survey respondents on what could be done to enhance the Safari Rally Kenya experience.

- Smart planning of proper traffic management within the rally zone.
- Make sure there is live local coverage.
- Proper, numerous and clear signage to event upon entry to rally zone.
- Increase food joints in all spectator areas.
- Avail clean water for drinking at spectator areas.
- More spectator information and expand the spectator areas to avoid overcrowding.
- Master of Ceremony to the spectator's points to enhance communication.
- Making sure that the essential sanitation facilities are well set before the arrival of the spectators.
- Roads to be watered to contain the dust to allow for visibility
- To have multiple spectator points to avoid overcrowding and have more marshals and traffic police

3.5 Length of Stay and Visitors Expenditure

3.5.1 Visitor's Stay at the Rally

It was observed that 46.8% of visitors spent at least one night at the rally zone while 53.2% returned back home on the same day of attending the rally.

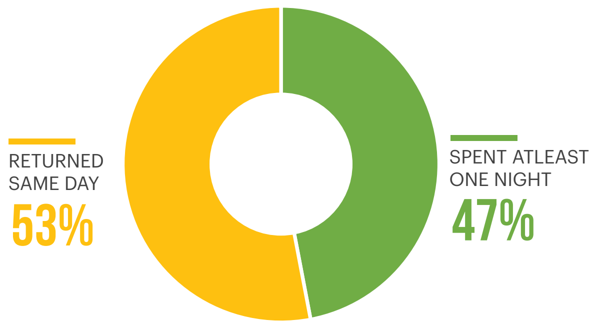

Figure 3.17: Length of stay

3.5.2 Visitors' stay at Rally by Gender

The study findings revealed that out of a total of 2,040 females who visited the rally, 59.8% stayed less than a day at the rally and 40.2% stayed for a day. Out of 972 males who visited the rally, most stayed for a day, summing up to 60.6% while 39.4%stayed for less than a day as shown in table 3.2.

Table 3.2: Visitors' Stay at Rally by Gender

LENGTH OF VISITORS' STAYS AT THE RALLY BY GENDER

LENGTH OF STAY		FEMALE		MALE		TOTAL	
	SAME DAY VISITORS	1,220	59.8%	383	39.4%	1,603	53.2%
	OVERNIGHT VISITORS (1 day plus)	820	40.2%	589	60.6%	1,409	46.8%
TOTAL		2,040	100.0%	972	100.0%	3,012	100.0%
		67.7%		32.3%		100.0%	

3.5.3 Visitors' expenditure

The mean expenditure is estimated to be between Kshs. 31,000 to Kshs. 41,000 although distribution is skewed.

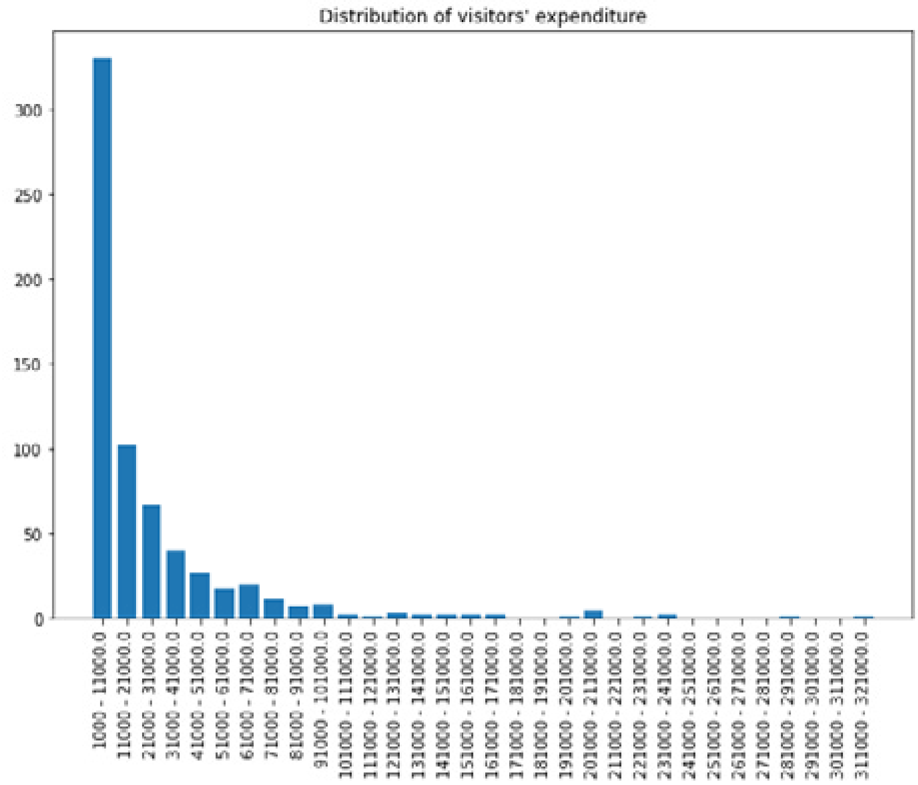

Figure 3.18: Distribution of visitor's expenditure

3.5.4 Visitors' expenditure by Gender

Upon studying the visitor's expenditure by gender, it was revealed that male visitors spent more compared to female visitors with an expenditure rate of 57.1%. The average expenditure range for the females was Kshs. 31,000 to Kshs. 41,000 while males had an average spending between Kshs. 51,000, to Kshs. 61,000 as shown in table 3.10.

Table 3.4: Visitors' Expenditure by Gender

Count		**Gender**				**Total**
		Female	**%Female**	**Male**	**%Male**	
Expenditure range	1000 – 11000	154	55.2	176	47.3	330
	101,000 – 111,000	0	0	2	0.5	2
	11,000 – 21,000	41	14.7	61	16.4	102
	111,000 – 121,000	0	0	1	0.3	1
	121,000 – 131,000	1	0.4	2	0.5	3
	131,000 – 141,000	2	0.7	0	0	2
	141,000 – 151,000	1	0.4	1	0.3	2
	151,000 – 161,000	2	0.7	0	0	2
	161,000 – 171,000	1	0.4	1	0.3	2
	191,000 – 201,000	1	0.4	0	0	1
	201,000 – 211,000	0	0	4	1.1	4
	21,000 – 31,000	24	8.6	42	11.3	66
	221,000 – 231,000	0	0	1	0.3	1
	231,000 – 241,000	1	0.4	1	0.3	2
	281,000 – 291,000	1	0.4	0	0	1
	31,000 – 41,000	12	4.3	28	7.5	40
	311,000 – 321,000	0	0	1	0.3	1
	41,000 – 51,000	14	5.0	12	3.2	26
	51,000 – 61,000	4	1.4	13	3.5	17
	61,000 – 71,000	9	3.2	11	3	20
	71,000 – 81,000	3	1.1	8	2.2	11
	81,000 – 91,000	5	1.8	2	0.5	7
	91,000 – 101,000.	3	1.1	5	1.3	8
Total		279	42.9	372	57.1	651

3.5.5 Visitors' Expenditure distribution by age

Figure 3.19 reveals that visitors between the ages of 24 – 34 had the highest expenditure level through different expenditure bins. Also visitors aged between 35 – 44 years demonstrated significant spending across the expenditure bins.

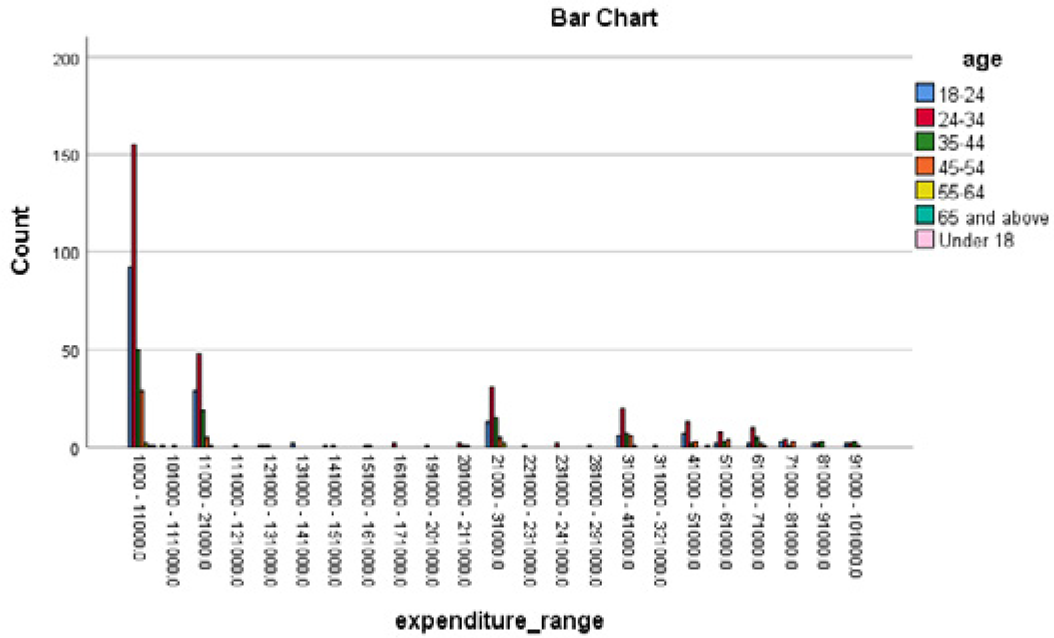

Figure 3. 19: Expenditure by Age

3.5.6 Visitors' Expenditure distribution by length of stay at the Rally

Figure 3.20 indicates that visitors who stayed for more than one day spent more than visitors who stayed less than a day. The highest expenditure range for the two cases was between Kshs. 1,000 to Kshs. 11,000. This was followed by Kshs. 11,000 to Kshs. 21,000 range which was closely followed by 21,000 to Kshs. 31,000 range for those who spent a day at the Rally.

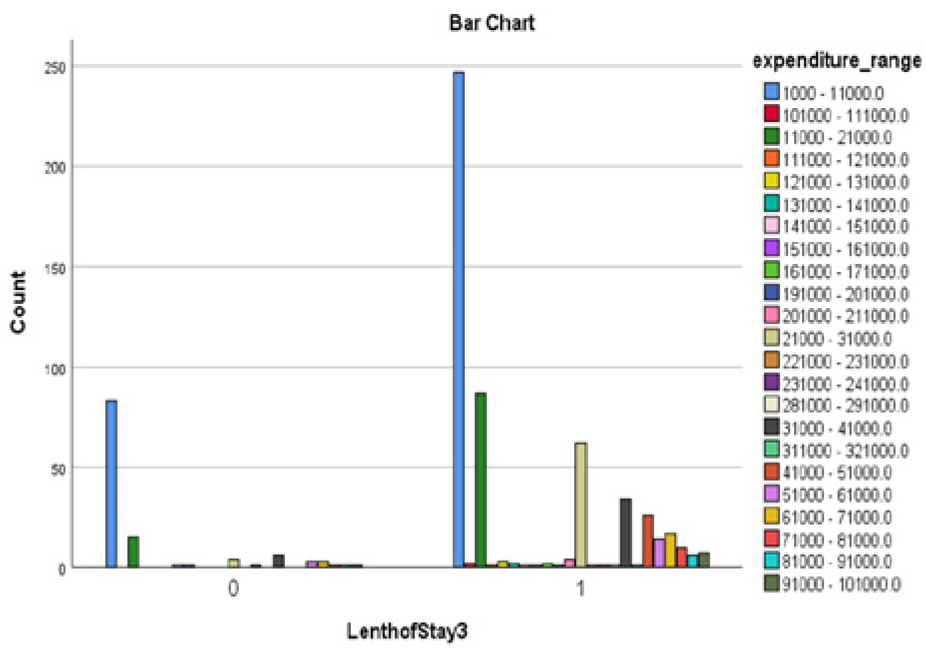

Figure 3. 20: Expenditure by length of stay

3.6 Weighted Sample Information – From Sample to the Population (Total Rally Attendees)

Appendix 1 gives the aggregate expenditure by the entire population that attended the safari rally.

3.6.1 Length of Stay (Nights) by Countries of Origin

Using survey weights helps in making correct inferences about the finite population that is represented by the survey. In other words, the weights measure the number of people in the population that are represented by each member of the sample (unweighted sample implies that sample members are weighted equally).

Table 3.5 Tourists' Total Length of Stay (Sample Weighted)

COUNTRY OF RESIDENCE	TOTAL TOURISTS	AVERAGE LENGTH OF STAY	TOTAL NIGHTS
America	447	5.13	2,293
Asia	176	5.5	968
Europe	150	4.83	725
Kenya	43,920	2.25	98,820
Rest of Africa	632	4.91	3,103

3.6.2 Tourists' Expenditure by Countries of Origin

Tourists' Total Expenditure:

*Counted Number of Visitors*Estimated Average Length of Stay*Average Expenditure per Day (24 hour)/Night*

Visitors from outside the country spent almost Kshs. 1.29 billion due to the motor rally event.

Table 3.6: Estimated Tourists' Expenditure (Weighted)

REGION OF RESIDENCE	Counted Number of Visitors(1)	Estimated Average Length of Stay(2)	Average Expenditure per Day (24 hour) /Night(3)	TOTAL EXPENDITURE (Ksh)(1,2,3)
America	447	5.13	329,650	755,923
Asia	176	5.5	137,905	133,492
Europe	150	4.83	125,948	91,249
Kenya	43,920	2.25	45,317	4,478,225
Rest of Africa	632	4.91	99,369	308,353
			TOTAL	5,767,244

3.6.3 Length of Stay (Nights) by Kenya's Regions of Residence

Tourists' Total Length of Stay by Nights (Sample Weighted)

Figure 3.7 reveals that visitors between the ages of 24 – 34 had the highest expenditure level through different expenditure bins. Also visitors aged between 35 – 44 years demonstrated significant spending across the expenditure bins.

Table 3.7: Tourists' Total Length of Stay by Nights (Sample Weighted)

REGION OF OF RESIDENCE(Kenya)	TOTAL No. OF TOURISTS	AVERAGE LENGTH OF STAY	TOTAL NIGHTS
Central	5,906	1.89	11,162
Coast	1,645	2.70	4,442
Eastern	1,249	2.06	2,573
Nairobi	21,197	2.34	49,601
Nyanza	836	2.35	1,965
Rift Valley	6,958	2.27	15,795
Western	485	1.83	888

3.6.4 Expenditure by Kenyan Regions of Residence

Tourists' Total Expenditure:

*Counted Number of Visitors*Estimated Average Length of Stay*Average Expenditure per Day (24 hour)/Night*

Table 3.8: Tourists' Total Expenditure (Weighted)

REGION OF OF RESIDENCE(Kenya)	TOTAL NIGHTS	MEAN EXPEND PER DAY	TOTAL EXPENDITURE(Ksh)
Central	11,162	37,897	423,017
Coast	4,442	121,300	538,814
Eastern	2,573	15,181	39,061
Nairobi	49,601	34,680	1,720,169
Nyanza	1,965	43,822	86,111
Rift Valley	15,795	55,746	880,520
Western	888	20,768	18,442
Others	18,992	40,653	772,088
		TOTAL	4,478,225

CHAPTER FOUR

TOTAL ECONOMIC IMPACTS OF WRC SAFARI RALLY KENYA 2021

4.0 Introduction

This section presents discussions on the estimations of the impacts of WRC Safari Rally 2021 in terms of output, employment generation, labor income earning and total value generation.

4.1 Total Impact Due to Inbound and Domestic Tourism

Total tourists' expenditure(international and domestic) of Kshs 6.736 billion for the June/July 2021 rally period was realised decomposed into accommodation, food and drinks, passenger transport, attractions and other expenditure activities (Table 4.1).

Table 4. 1: Inbound and Domestic Visitors (Participants and Spectators) expenditure by consumption products and category of visitors (2021 Rally Period)

PRODUCTS	Excursionists (same-day visitors) Kshs.000s	Tourists (overnight Visitors) Kshs.000s	Total Visitors expenditure (Kshs)	Sponsorship and Donations (Kshs 000s)	Total Expenditure = Total Visitor Expend + Sponsorship (Kshs.000s)
Transport and Packing	290,509	1,945,112	2,235,621	0	2,235,621
Accomodation	0	1,757,726	1,757,726	1,500	1,759,226
Shopping and Souvenir	141,784	691,219	833,003	0	833,003
Food and Entertainment	436,213	1,093,338	1,529,551	2,000	1,531,551
Sports and Recreation	54,767	213,624	268,391	30,000	298,391
Other Expenditure	12,120	66,225	78,345	0	78,345
TOTAL	935,393	5,767,244	6,702,637	33,500	6,736,137

This expenditure had impact on jobs and labour income; stimulation of businesses(output); new investment; and total value addition to the economy. Table 4.2 summarizes total effects of visitors' expenditure on various tourism products and services. Given the multiplier effect of tourism on other economic sectors, these total effects/impact are composed of direct, indirect and induced effects arising from tourists' initial expenditure on goods and services as generated by IMPLAN modelling.

Table 4. 2: Total Impact of International and Domestic Visitors' Expenditure at the Rally

		Accommodation	Food & Drinks	Passenger Transport	Attractions	Other	Total
Employment (Full Time Equivalent Jobs)	Direct	2,810	2,513	1,269	207	840	7,639
	Indirect	2,611	344	2,364	46	135	5,500
	Induced	2,125	1,031	2,768	230	390	6,544
	Total	7,546	3,888	6,401	483	1,365	19,683
Labour Income (Kshs. Million)	Direct	254	227	380	53	76	990
	Indirect	510	68	445	19	47	1,089
	Induced	239	116	311	26	44	736
	Total	1,003	411	1,136	98	167	2,815
Total Value Added (Kshs. Million)	Direct	705	1,311	940	176	156	3,288
	Indirect	1,092	171	977	39	106	2,385
	Induced	597	289	777	65	109	1,837
	Total	2,394	1,771	2,694	280	371	7,510
Output (Kshs. Million)	Direct	1,916	1,505	2,108	216	264	6,009
	Indirect	1,552	248	1,745	57	159	3,761
	Induced	863	419	1,124	93	158	2,657
	Total	4,331	2,172	4,977	366	581	12,427

Accommodation sub-sector is estimated to have supported 7,546 full time jobs and generated Kshs. 1.003 billion as labour income, Kshs. 2.394 billion in value addition and Kshs. 4.331 billion as output(business generated). (Appendix 2). Food and Beverage services sub-sector (F&B) supported about 3,888 jobs, generated Kshs.411 million as labour income, Kshs. 1.771 billion in value addition and Kshs. 2.172 billion as output. Passenger transport and reservation services(tour operators and travel agents) expenditure supported 6,401 jobs, generated Kshs. 1.136 billion as labour income, Kshs. 2.694 billion in value addition and Kshs. 4.977 billion worth of output. Attractions sub-sector supported 483 jobs and generated Kshs.98 million as labour income, Kshs.280 million in value addition and Kshs.366 million as output.

4.2 Total Impact of Gross Fixed Capital Formation (GFCF)

The System of National Accounts 2008 defines Gross Fixed Capital Formation (GFCF) as the acquisition, less disposals, of fixed assets plus major improvements to land and other non-produced assets. Valuation of GFCF also includes transfer costs on land and other non-produced assets. Fixed assets are tangible or intangible assets produced as outputs from processes of production that are themselves used repeatedly or continuously in other processes of production for more than one year. The analysis of stocks and flows of physical investment is particularly important for tourism. Tourism is not possible on a relevant scale if there is lack of basic infrastructure for transportation, accommodation, recreation, health services, and other facilities that determine, to a large extent, the nature and intensity of visitor flows.

Tourism driven investment can generally be classified in three main categories, as follows:

(i) Tourism-specific fixed assets

Because of their specific nature and design, tourism-specific fixed assets are used exclusively or almost exclusively in the production of tourism characteristic goods and services. If tourism did not exist, such assets would be of little value as they could not easily be converted to non-tourism applications. Such assets include railway passenger coaches, cruise ships, sightseeing buses, hotel facilities, convention centres, marinas, and ski lifts. Vacation homes are also included in this category although, in this case, they might easily be modified from a secondary to principal dwelling of a household.

(ii) Non-tourism-specific fixed assets

Investments by tourism industries in non-tourism-specific fixed assets are considered as tourism-related not because of the nature of the assets themselves, but because of the use made of them by the tourism industry. This category includes, for example, hotel or travel agency computer systems, and hotel laundry facilities.

(ii) Non-tourism-specific fixed assets

Investments by tourism industries in non-tourism-specific fixed assets are considered as tourism-related not because of the nature of the assets themselves, but because of the use made of them by the tourism industry. This category includes, for example, hotel or travel agency computer systems, and hotel laundry facilities.

Table 4.3: Estimated Gross Fixed Capital Formation/New Investments stimulated by the Rally

INDUSTRY	Investment (USD)	Investment (Kshs.000s)
Accommodation for visitors' service	363,636	40,000
Food and beverage services	272,727	30,000
Transport	6,427,272	707,000
Cultural, Sports and Recreation	136,364	15,000
TOTAL	720,000	792,000

Table 4.4 analyses further effects of the above investments. Due to these investments, accommodation sub-sector is estimated to have supported additional 152 full time jobs and generated Kshs.20 million as labour income, Kshs.48million in value addition and Kshs.87 million as output (Appendix 3). Food and Beverage serving sub-

sector (F&B) supported about 78 jobs, generated Kshs.8 million as labour income, Kshs.36 million in value addition and Kshs.43 million as output. Passenger transport and reservation services expenditure supported 2,146 jobs, generated Kshs.381 million as labour income, Kshs.937 million in value addition and Kshs. 1.669 billion worth of output. Other GFCF category generated 24 jobs, Kshs.7 million as labour income, Kshs.19 million in value addition and Kshs.25 million as output.

4.3 Total Impact of Tourism Collective Consumption (TCC)

Tourism Collective Consumption refers mainly to expenditure by Government agencies in tourism related activities. Although collective non-market services have been excluded from tourism consumption, this does not mean that measurement of the expenditure by public administration in the tourism-related fields of market promotion, information, planning, etc. is not relevant and that it does not have its place in the aggregate measurement concerning the economic importance of tourism. The public sector plays an important role in the development of tourism activities in many countries. The Government establishes the legal framework for the tourism activity and establishes certain controls on the production of services, and in some cases guarantees the quality of the service that is provided through provision of licenses and the development of codes of conduct. It sets the legal framework for private investment and sets norms for the preservation of the environment and the cultural and historical heritage. It studies the flows of visitors and might develop or promote public initiatives to attract visitors to specific locations at certain moments of the year. The Government organizes important events and coordinates private initiatives that are involved in serving visitors. In certain cases, it organizes and controls the financing of the required investments for tourism.

These functions can be developed at different levels of Government: at the national level, at the county (sub-national) level, and even at the level of local entities. The value of these different activities developed by the public administration can be established along the same parameters of measurement as any other collective non-market services; that is through their cost of production. The value of consumption is, by convention, equal to the value of production.

Table 4.4 contains non-market services that are considered as tourism collective non-market services. The table provides a compilation of this information by product and level of government. An additional column under the private sector is given as a memorandum item to collect information on services (such as tourism promotion) that benefit the tourism industries but are financed by the industries themselves, and thus do not qualify as tourism collective consumption.

Table 4.4: Tourism collective consumption by products and levels of government during the rally period

Products (*)	**National (GoK) (KShs.000s)**	**Nakuru and other County Governments (KShs.000s)**	**Memorandum Item (KShs.000s)**
Tourism promotion services	230,000	25,000	10,000
Visitor information services	9,500	10,000	5,000
Public administrative services related to the distributive and catering trades, hotels and restaurants	80,000	12,000	3,000
Public administrative services related to tourism affairs	10,000	7,000	10,000
Part of:			
Market research and public opinion polling services	10,000	3,000	2,000
Police and fire protection services	140,000	2,500	
Other education and training services, n.e.c.	2,000	5,000	1,000
Educational support services	100,000	20,000	1,000
Other	20,000	10,000	500
Total (Kshs)	**601,500**	**94,500**	**32,500**

Table 4.5: Tourism Collective Consumption (TCC) Impact Summary

IMPACT TYPE	EMPLOYMENT	LABOUR INCOME	TOTAL VALUE ADDED	OUTPUT
Direct Effect	1,140	293,294,540	512,348,760	728,499,970
Indirect Effect	292	93,046,250	198,662,860	295,785,270
Induced Effect	1,243	139,756,650	348,913,510	504,757,660
TOTAL	2,675	526,097,330	1,059,925,130	1,529,042,790

Total Impact of Gross Fixed Capital Formation and Tourism Collective Consumption

GFCF and TCC expenditure on the rally in June/July 2021 supported 5,075 total full-time equivalent jobs and generated Kshs.942 million as labour income, almost Kshs. 2.100 billion in value addition and Kshs. 3.353 billion as output (Table 4.6).

Table 4. 6: Total Impact of Gross Fixed Capital Formation and Tourism Collective Consumption

	Gross Fixed Capital Formation				**Tourism Collective Consumption (TCC) (Kshs)**	**Total Spending (Kshs)**
	(GFCF) (Kshs)					
	Accommodation	**Food & Drinks**	**Passenger Transport**	**Other**	**Public Administration**	**GFCF and TCC**
Direct	0	0	0	0	1,140	1,140
Indirect	109	57	1,218	8	292	1,684
Induced	43	21	928	16	1,243	2,251
Total Employment (FTE)	152	78	2146	24	2675	5,075
Direct	0	0	0	0	293	293
Indirect	15	6	277	5	93	396
Induced	5	2	104	2	140	253
Total Labour Income (million)	20	8	381	7	526	942
Direct	0	0	0	0	512	512
Indirect	36	30	676	15	199	956
Induced	12	6	261	4	349	632
Total Value Added (million)	48	36	937	19	1,060	2,100
Direct	0	0	0	0	728	728
Indirect	70	35	1,292	19	296	1,712
Induced	17	8	377	6	505	913
Total Output (million)	87	43	1,669	25	1,529	3,353

Source: Kenya Implan Model, 2021

4.4 Overall Impact Analysis

Total Tourism Internal Demand (TTID) is the sum of tourists' expenditure/consumption (Kshs. 6.736 billion), tourism gross fixed capital formation (Kshs. 792 million) and tourism collective consumption (Kshs. 729 million) amounting to Kshs. 8.258 billion. This stimulated a total impact by the rally of 24,758 full time equivalent jobs, jobs, 3.757 billion in labour income, 9.610 billion in value addition to the economy and 15.780 billion in output(new business generated), Table 4.7.

Table 4.7: Impact of Total Tourism Internal Demand (TTID) (Kshs)

		Tourists'/Visitors' Expenditure (ITE)	Gross Fixed Capital Formation (GFCF)+ Tourism Collective Consumption (TCC)	Total Impacts (ITE+GFCF+TCC)
Employment	Direct	7,639	1,140	8,779
	Indirect	5,500	1,684	7,184
	Induced	6,544	2,251	8,795
	Total	**19,683**	**5,075**	**24,758**
Labour Income	Direct	990	293	1,283
(Kshs. Million)	Indirect	1,089	396	1,485
	Induced	736	253	989
	Total	**2,815**	**942**	**3,757**
Total Value Added	Direct	3,288	512	3,800
(Kshs. Million)	Indirect	2,385	956	3,341
	Induced	1,837	632	2,469
	Total	**7,510**	**2,100**	**9,610**
Output	Direct	6,009	728	6,737
(Kshs. Million)	Indirect	3,761	1,712	5,473
	Induced	2,657	913	3,570
	Total	**12,427**	**3,353**	**15,780**

Source: Kenya Implan Model, 2021


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CHAPTER FIVE

CONCLUSION AND RECOMMENDATIONS

5.1 Conclusion of the study

The section below presents a summary of the findings based on the survey variables examined; visitor demographics and social economic characteristics by regions, trip characteristics, attendee's satisfaction levels, and length of stay and visitor expenditure.

5. 1. 1 Visitor demographics and social economic characteristics by regions

The findings demonstrated that most (52.4%) of the attendees were from Nairobi region, Rift valley region was ranked second with 21.5% while Central region accounted for 15.3%. On the basis of gender and age distribution of the visitors in the Rally, 60.4% of the attendees were female and 39.6% of the attendees were male.

In terms of age distribution, most of the visitors (51.8%) were aged between 24 –34 while other age groups were evenly distributed across. Furthermore, 65.6% had attained university degree while Masters / PhD are ranked second with an attendance of 14.8%. Middle level colleges were represented by 12.9%. Most of the rally attendees were Kenyans with a representation of 98.9%. Europeans were represented by 0.4% while other African countries had 0.3% representation. America and Asians were ranked the least in attendance with 0.2% each.

5.1.2 Trip characteristics

The study observed that most of the visitors who attended the rally event were spectators accounting for 77.3% of the visitors while rally team ranked second with an attendance of 17.1% and the media and organizers had a representation of 5.6%. Most of the visitors 99.6% stayed for less than 10 days within the Rally zone. However, Rally event organizers stayed for 50 days which is recorded to be the maximum number of days stayed by a visitor while members of the rally teams stayed between 10 to 40 days during the rally period.

The study revealed that 40.3% of the visitors acquired information about the rally through social media while 17.8% of the visitors received the information from friends and family. Information obtained from print/electronic media accounted for 13.5 while information from the Kenya Tourism Board accounted for 10.2%. In terms of travel arrangements, most of the visitors (51.5%) made self-travel arrangements while those who made arrangements through Travel agencies accounted for 36.1%.

The highest number of visitors 51.7% decided to participate in the rally less than two weeks before the trip, 17.4% 1-5 months before the trip, 14.9% less than one month before the trip (14.9) and 9.4% 6-12 months before the trip. On the other hand, most of the visitors (84.5 %) used road as a transportation mode to get to the rally destination while 14.4% of the visitors travelled by air. On the mode of transport that visitors used within the Rally destination, most of the visitors (76.6%) used private cars for transport, while 9.8% were walking. It is observed that aside from watching the rally, visitors also participated in other activities. Majorly Sightseeing, Wildlife viewing and shopping accounting for 28.3%, 21.9% and 20.7% of visitors respectively.

Most of the visitors (66.6 %) had their accommodations in other facilities other than the ones listed in the questionnaires. However, 16% of the visitors stayed in hotels, 5.4% in guest houses, 4.1 % in cottages and 2.8% of the visitors stayed in homestays/Airbnb. Game lodges and hostels were ranked the least in accommodation offering accounting for 0.8% and 0.6% respectively.

5.1.3 Satisfaction levels

When asked about the overall satisfaction level almost 93.6% of visitors cited that they were satisfied with the experience of WRC while 6.4% indicated they were not satisfied. Additionally, most of the visitors (97.8 %) cited that they would recommend future rallies to their friends, relatives or colleagues at home while 2.2 % of visitors stated that they would not recommend future Rallies to their friends, relatives and colleagues.

Moreover, attendees highlighted some of the issues that led to their dissatisfaction including; lack of measures to curb overcrowding and ensure social distancing as a Covid-19 containment measure, lack of adequate spectator zones for the attendees, lack of adequate toilet facilities, and lack of signage's to aid directions, unorganized spectator stages and disorganized park entries.

5.1.4 Length of stay and visitor expenditure

It was observed that 46.8% of visitors spent at least one night at the rally zone while 53.2% returned back home on the same day of the rally. Additionally, out of a total of 2,040 females who visited the rally, 59.8% stayed less a day in the rally and 40.2% stayed for a day while out of 972 males who visited the rally, most stayed for a day, summing up to 60.6.

Upon studying the visitor's expenditure by gender, it was revealed that male visitors spent more compared to female visitors with an expenditure rate of 57.1%. The average expenditure range for the females was Kshs. 31,000 to Kshs. 41,000 while males had an average spending between Kshs. 51,000, to Kshs. 61,000. Visitors between the ages of 24 – 34 had the highest expenditure level through different expenditure bins

5.1.5 Impact Analysis

Total Tourism Internal Demand (TTID) expenditure of Kshs. 8.258 billion supported 24,758 full time equivalent jobs and generated Kshs. 3,757 million as labour income, nearly Kshs. 9,610 million in value addition and Kshs. 15,780 million as output.

5.2 Recommendations

The survey respondents pointed at various areas of improvement during the event, most common were accessibility and provision of basic amenities at the spectator points. The following are key recommendations for hosting future rally events.

i. Improve participants experience

Provide adequate basic amenities such as toilets for different genders and avail hand washing stations. Develop several access points to the spectator stages to avoid traffic snarl up. Provide adequate spectator stages that are well shaded with mounted screens for participants to follow the rally happenings.

ii. Provide alternative routes to the rally zone

The rally caused major traffic snarl up along the Nairobi-Nakuru highway, this can be avoided by creating different routes for participants and other travelers trans-versing the country

iii. Create public awareness

Inform the general public of the event so that those intending to travel along the rally zone can take alternatives routes. Also, the public needs to be informed on the safety measures including FIA safety guidelines and precautions that must be adhered to along the routes especially in crowded areas like Nairobi Central Business District and Naivasha town.

iv. Inadequate accommodation facilities

A number of the survey respondents indicated that they slept in their vehicles due to lack of accommodation facilities and high cost of these facilities. Lack of adequate accommodation facilities contributed to limited number of participants. This can be managed by offering alternatives accommodation facilities such as homestays. Locals can be encouraged to put up their homes as homestays through platforms such as www.homestay.com. The tourism sector regulator, TRA can help in advising on standards and expectations of visitors to homestay.

v. Pre-event activities.

Hold pre-event activities such as food, cultural festivals, County tour, this will create an opportunity for rally zone counties to showcase what they have to offer to tourists and investors (especially on niche tourism products).

Action plan to implement the above recommendations for the next rally event that will be held in June 2022.

Table 5.1: Action Plan

Activity	Key Action	Lead Agency	Other Players
Improve Participants experience	-Develop various access points to spectator stages -Provide adequate amenities. - Provide adequate and well-organized spectator stages -Provide continuous information on event happenings	Kenya Safari Rally Office	State Department for Sports
Develop aalternative routes to the rally zone	-Create different routes for participants and other travelers trans versing the country	Ministry of Transport, Infrastructure, Housing and Urban Development (MoTIHUD)	Kenya Police Service (KPS)
Create public awareness	-Develop a communication campaign to Inform the general public of the event. -Inform the public through media of the FIA safety guidelines and enforce adherence these guidelines.	State Department for Sports Kenya safari rally office	 Kenya Police Service (KPS)
Offer alternative accommodation	Educate locals on the homestay concept and encourage them to provide their homes for the rally participants at a fee.	Nakuru County govt	Tourism Regulatory Authority (TRA)
Curate Pre-Rally Activities	Develop an event prior to the rally such as food/ cultural festival to showcase tourism products of a particular county	MOTW, Nairobi/Nakuru County Govt	Kenya Tourism Board (KTB)

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APPENDICES

Appendix 1: Overall WRC 2021, Safari Rally Kenya Tourism Analysis

Appendix 1A: Based on Countries of Origin (Regions)

Weighting Formulas

- Mean Expenditure (Sample)*Population Visitors = Total Expenditure
- Average Length of Stay (Sample)*Population Visitors = Total Nights
- Total Expenditure/Total Nights = Mean Expenditure Per Day

1.1 Same Day-Visitor Expenditure in the Sample Survey

Table 1. 1 : Average Spent by Same Day Visitors (Sample Un-weighted)

Country of Residence	Total Expenditure	Number of Same Day Visitors (SDVs)	Mean Expenditure
Americas	54,550	1	54,550
Europe	31,700	2	15,850
Kenya	2,411,524	145	16,631
Rest of Africa	27,200	1	27,200
Total	**2,794,974**	**149**	**18,758**

Table 1. 2 : Same Day Visitor Expenditure (Weighted)

Country of Residence	Number of Same Day Visitors (SDVs)	Mean Expenditure	Total Expenditure (Kshs.000s)
America	753	54,550	41,076
Europe	450	15,850	7,132
Kenya	52,580	16,631	874,457
Rest of Africa	468	27,200	12,729
Total	**54,575**		**935,396**

1.2 Tourists' Average Length of Stay in the Sample

Table 1. 3: Tourists Average Length of Stay by Nights (Sample Un-weighted)

Country of Residence	Total Length of Stay	Sample Size	Average Length of Stay
America	82	16	5.13
Asia	33	6	5.50
Europe	29	6	4.83
Kenya	3,668	1,628	2.25
Rest of Africa	113	23	4.91
Total	3,925	1,679	2.34

1.3 Tourists' Average Length of Stay by Nights (Sample Weighted)

Using survey weights helps in making correct inferences about the finite population that is represented by the survey. In other words, the weights measure the number of people in the population that are represented by each member of the sample (unweighted sample implies that sample members are weighted equally).

Table 1. 4: Tourists' Total Length of Stay by Nights (Sample Weighted)

Country of Residence	Total Tourists	Average Length of Stay	Total Nights
America	447	5.13	2,293
Asia	176	5.5	968
Europe	150	4.83	725
Kenya	43,920	2.25	98,820
Rest of Africa	632	4.91	3,103
Total	45,325	2.34	106,061

1.4 Estimated Expenditure per Night by Tourists (Sample Un-Weighted)

Table 1. 5: Estimated Tourist Expenditure per Night (Sample Un-weighted)

Country/Region of Residence	Sample Size	Mean Expenditure per Night (Total Expenditure/ Total Nights)
America	7	329,650
Asia	3	137,905
Europe	1	125,948
Kenya	637	45,317
Rest of Africa	12	99,369

1.4 Estimated Expenditure per Night by Tourists (Sample Un-Weighted)

*Counted Number of Visitors*Estimated Average Length of Stay*Average Expenditure per Day (24 hour)/Night*

Table 1. 6: Estimated Tourists' Expenditure (weighted)

Country of Residence	Counted Number of Visitors (1)	Estimated Average Length of Stay (2)	Average Expenditure per Day (24 hour)/Night (3)	TOTAL EXPENDITURE (Kshs.000s) (1*2*3)
America	447	5.13	329,650	755,923
Asia	176	5.5	137,905	133,492
Europe	150	4.83	125,948	91,249
Kenya	43,920	2.25	45,317	4,478,225
Rest of Africa	632	4.91	99,369	308,353
Total Expenditure				**5,767,244**

Appendix 1B: Based on Kenyan Regions

1.1 Same Day-Visitors Expenditure in the Sample Survey

Table 1. 7: Average Spent by Same Day Visitors (Sample Un-weighted)

Region of Residence	SDVs	Mean Expenditure
Central	11	17,427
Coast	11	14,396
Eastern	4	10,687
Nairobi	49	19,012
Nyanza	2	12,700
Rift Valley	72	14,751

Table 1. 8: Same Day Visitors Expenditure (Weighted)

Region of Residence	Same Day Visitors	Mean Expenditure	Total Expenditure (Kshs.000s)
Central	6,376	17,427	111,114
Coast	2,264	14,396	32,592
Eastern	1,952	10,687	20,861
Nairobi	22,902	19,012	435,412
Nyanza	703	12,700	8,928
Rift Valley	18,002	14,751	265,547
Total Expenditure			**874,456**

1.2 Tourists' Average Length of Stay in the Sample

Table 1. 9: Tourists Average Length of Stay by Nights (Sample Un-weighted)

	Spectators and Participants		
County of Residence	**Total Nights**	**Number of Tourists**	**Average Length of Stay (ALS)**
Central	414	219	1.89
Coast	165	61	2.70
Eastern	109	53	2.06
Nairobi	1,836	786	2.34
Nyanza	73	31	2.35
Rift Valley	586	258	2.27
Western	33	18	1.83

1.3 Tourists' Total Length of Stay by Nights (Sample Weighted)

Table 1. 10: Tourists' Total Length of Stay by Nights (Sample Weighted)

Region of Residence	Total Tourists	Average Length of Stay	Total Nights
Central	5,906	1.89	11,162
Coast	1,645	2.70	4,442
Eastern	1,249	2.06	2,573
Nairobi	21,197	2.34	49,601
Nyanza	836	2.35	1,965
Rift Valley	6,958	2.27	15,795
Western	485	1.83	888

1.4 Estimated Expenditure per Night by Tourists (Sample Un-Weighted)

Table 1. 11: Estimated Expenditure per Night by Tourists (Sample Un-weighted)

Region of Residence	Number of Tourists	Mean Expenditure Per Day
Central	76	37,897
Coast	23	121,300
Eastern	25	15,181
Nairobi	292	34,680
Nyanza	13	43,822
Rift Valley	224	55,746
Western	8	20,768

1.5 Tourists' Total Expenditure (Weighted)

The total tourist expenditure is derived as follows:

*Total Nights*Average Expenditure per Day (24 hour)/Night*

Table 1. 12: Estimated Expenditure per Night by Tourists (Sample Un-weighted)

Region of Residence	Total Nights	Mean Expend Per Day	Total Expenditure (Kshs.000s)
Central	11,162	37,897	423,017
Coast	4,442	121,300	538,814
Eastern	2,573	15,181	39,061
Nairobi	49,601	34,680	1,720,169
Nyanza	1,965	43,822	86,111
Rift Valley	15,795	55,746	880,520
Western	888	20,768	18,442
Others (Region not Stated)	18,992	40,653	772,088
Total Expenditure	**86,426**		**4,478,225**

Appendix 2: Inbound and Domestic Tourism Impact Summary

Table 2. 1 Accommodation Inbound

Impact Summary	**IMPLAN Model 1.impdb**	**Copyright 2021 Minnesota IMPLAN Group, Inc.**		
Impact Type	Employment	Labor Income	Total Value Added	Output
Direct Effect	2,810	253,872,630	705,350,360	1,915,988,910
Indirect Effect	2,611	509,589,520	1,091,914,340	1,552,970,210
Induced Effect	2,125	238,980,940	596,634,830	863,125,010
Total Effect	7,546	1,002,443,090	2,393,899,420	4,332,084,130

Table 2. 2: Food and Beverage Inbound

Impact Summary	**IMPLAN Model 1.impdb**	**Copyright 2021 Minnesota IMPLAN Group, Inc.**		
Impact Type	Employment	Labor Income	Total Value Added	Output
Direct Effect	2,513	227,045,500	1,310,831,940	1,504,747,310
Indirect Effect	334	67,965,810	171,033,060	248,336,660
Induced Effect	1,031	115,948,910	289,475,670	418,771,540
Total Effect	3,878	410,960,220	1,771,340,670	2,171,855,510

Table 2. 3: Attractions Inbound

Impact Summary	IMPLAN Model 1.impdb	Copyright 2021 Minnesota IMPLAN Group, Inc.		
Impact Type	Employment	Labor Income	Total Value Added	Output
Direct Effect	207	53,376,730	175,924,430	216,070,580
Indirect Effect	46	19,116,680	38,808,000	57,289,540
Induced Effect	230	25,882,780	64,618,510	93,480,750
Total Effect	484	98,376,190	279,350,940	366,840,870

Table 2.4: Transport Inbound

Impact Summary	IMPLAN Model 1.impdb	Copyright 2021 Minnesota IMPLAN Group, Inc.		
Impact Type	Employment	Labor Income	Total Value Added	Output
Direct Effect	1,269	380,056,380	940,153,500	2,108,103,030
Indirect Effect	2,364	444,874,430	977,053,000	1,744,711,320
Induced Effect	2,768	311,249,290	777,058,370	1,124,135,760
Total Effect	6,401	1,136,180,100	2,791,970,060	4,976,950,220

Table 2.5: Shopping and Souvenirs Inbound

Impact Summary	IMPLAN Model 1.impdb	Copyright 2021 Minnesota IMPLAN Group, Inc.		
Impact Type	Employment	Labor Income	Total Value Added	Output
Direct Effect	840	75,874,370	155,883,750	263,543,720
Indirect Effect	135	46,558,930	106,214,130	159,283,740
Induced Effect	390	43,845,890	109,464,630	158,357,650
Total Effect	1,364	166,279,080	371,562,510	581,185,000

Appendix 3: Gross Fixed Capital Formation (GFCF) Impact Summary

Table 3. 1: GFCF Building and Facilities, 2019

Impact Summary	IMPLAN Model 1.impdb	Copyright 2021 Minnesota IMPLAN Group, Inc.		
Impact Type	Employment	Labor Income	Total Value Added	Output
Direct Effect	0	0	0	0
Indirect Effect	109	15,387,900	36,224,650	69,918,090
Induced Effect	43	4,816,790	12,025,420	17,396,610
Total Effect	152	20,204,580	48,249,960	87,314,700

Table 3. 2: GFCF Food and Beverage, 2019

Impact Summary	**IMPLAN Model 1.impdb**	**Copyright 2021 Minnesota IMPLAN Group, Inc.**		
Impact Type	Employment	Labor Income	Total Value Added	Output
Direct Effect	0	0	0	0
Indirect Effect	57	5,881,590	29,543,800	34,951,070
Induced Effect	21	2,311,650	5,771,260	8,349,000
Total Effect	77	8,193,240	35,315,060	43,300,070

Table 3. 3: GFCF Transport, 2019

Impact Summary	**IMPLAN Model 1.impdb**	**Copyright 2021 Minnesota IMPLAN Group, Inc.**		
Impact Type	Employment	Labor Income	Total Value Added	Output
Direct Effect	0	0	0	0
Indirect Effect	1,218	276,659,130	675,746,170	1,292,127,430
Induced Effect	928	104,384,390	260,603,970	377,004,210
Total Effect	2,147	381,043,520	936,350,140	1,669,131,640

Table 3. 4: GFCF Attractions (Sports and Recreations)

Impact Summary	**IMPLAN Model 1.impdb**	**Copyright 2021 Minnesota IMPLAN Group, Inc.**		
Impact Type	Employment	Labor Income	Total Value Added	Output
Direct Effect	0	0	0	0
Indirect Effect	18	5,032,610	14,907,200	18,977,200
Induced Effect	16	1,796,850	4,485,910	6,489,560
Total Effect	34	6,829,460	19,393,110	25,466,760

Appendix 4: Tourism Collective Consumption (TCC) Impact Summary

Impact Summary	**IMPLAN Model 1.impdb**	**Copyright 2021 Minnesota IMPLAN Group, Inc.**		
Impact Type	Employment	Labor Income	Total Value Added	Output
Direct Effect	1,140	293,294,540	512,348,760	728,499,970
Indirect Effect	292	93,046,250	198,662,860	295,785,270
Induced Effect	1,243	139,756,650	348,913,510	504,757,660
Total Effect	2,675	526,097,330	1,059,925,130	1,529,042,790

Appendix 5. 1: Questionnaire

Jambo

Tourism Research Institute, invites you to participate in this survey.
The survey aims at assessing and documenting the economic impact of 2021 World Rally Championships, Safari Rally Kenya on the country's tourism sector.

Key Guidelines

a) *Local Visitors to the Rally event: Residents of Nakuru County*
b) *Non-Local Visitors to the Rally event: (i) Kenya residents outside Nakuru County (ii) All visitors residing outside Kenya*
c) *Nakuru County is considered as the RALLY ZONE*
d) *Local Spectators (Nakuru County residents) to only state expenses directly and exclusively related to the Rally event*

SECTION A: Visitor Demographics

1. Nationality ________________________
2. Country/County of Residence________________
3. Gender? Male [ ] Female [ ] Other (Specify) _____________________
4. Age (Category in Years)
18-24 [ ]
25-34 [ ]
35-44 [
45-54 [ ]
55-64 [ ]
Above 65 [ ]

5. What is the highest level of education you have completed?
Less than high school [ ]
High school [ ]
University degree [ ]
Some middle level college [ ]
Masters/Ph.D. [ ]
Other (Specify) __________________________________

SECTION B: Trip Characteristics

6. Are you part of?
Sponsors [ ]
Rally Team [ ]
Media [ ]
Spectator [ ]
Organizers [ ]
Travel group/organization [ ]
Independent [ ]
Family [ ]
Colleagues/friends [ ]
Other (Specify) __________________________

7.How many nights will you be away from your usual residence, County or Country for this purpose?
Zero Nights [ ]
One Night [ ]
More than One Night, please Specify ________________________________

8. How did you get to know about the Safari Rally?

Social Media	[ ]
Internet sites	[ ]
Kenya Tourism board/ Magical Kenya	[ ]
Family & friends	[ ]
Travel agency/tour operator	[ ]
Guide books	[ ]
Print/Electronic Media	[ ]
Information centres	[ ]
Travel exhibitions	[ ]

Others (Specify)______________________________

9.Who made most of your travel arrangements?

Airline Office	[ ]
Rally Team	[ ]
Family & friends	[ ]
Travel agency/tour operator in Kenya	[ ]
Travel agency/tour operator outside Kenya?	[ ]
I arranged most/all of it myself	[ ]

Other (Specify)______________________________

10.When did you decide to participate in the Rally?

Less than 2 weeks before trip	[ ]
Less than one month before the trip	[ ]
1-5 months before the trip	[ ]
6-12 months before the trip	[ ]

More than 1year before the trip, please Specify _____________

11. What was your mode of transport to the Rally?

Air	[ ] Specify airline _______________
Water	[ ]
Road	[ ]
Rail	[ ]

Other (Specify)______________________________

12. On this trip which other activity did/will you participate in:

Wildlife Viewing	[ ]
Mountain Climbing	[ ]
Cultural tours	[ ]
Sightseeing	[ ]
Hiking	[ ]
Shopping	[ ]
Visit to Historical/Archaeological sites	[ ]
Beach Tourism	[ ]
Attend Conferences	[ ]

Other (Specify) ____

13. What is your primary mode of transport within the Rally zone?

Tour vehicle	[ ]
Private car	[ ]
Motor cycle	[ ]
Walking	[ ]
Bus	[ ]
Flying	[ ]

Other (Specify) ____

14. On this trip, which type of accommodation are you using?

Hotel	[ ]
Game Lodge	[ ]
Cottages	[ ]
Campsites	[ ]
Stay with Friends & Relatives	[ ]
Guest house	[ ]
Homestays/ Airbnb	[ ]
Hostels	[ ]

Other (Specify) ____

SECTION C: Estimated Visitors' expenditure

15. Are you on:

Organized tour package? [ ]

Individual travel arrangement? [ ]

1**6**. What was your total pre-trip expenditure before reaching Kenya/Rally Zone? ***Do not include sponsored items by Rally Organizers***

Currency__________________Amount_______________________

17. What is your planned total expenditure within Kenya/Rally Zone? ***Do not include sponsored items by Rally Organizers***

Currency__________________Amount_______________________

18. Approximately, how much do you plan to spend on each of the following within Kenya/Rally Zone, where applicable?
Do not include sponsored items by Rally Organizers

Transport:	Amount__________	Currency__________
Accommodation:	Amount__________	Currency__________
Food & Drinks/Catering:	Amount__________	Currency__________
General Shopping:	Amount__________	Currency__________
Entertainment:	Amount__________	Currency__________
Tickets:	Amount__________	Currency__________
Parking:	Amount__________	Currency__________
Souvenirs:	Amount__________	Currency__________

Other (Specify) ____

Total Spent: Amount__________Currency__________

Number of people covered under this expenditure: Adults_____Minors________

SECTION D: Future Intentions

19. What is your level of satisfaction with the Rally event and facilities in the Rally Zone?
Use the Key: VD- Very dissatisfied; D- Dissatisfied; SD-somewhat dissatisfied; SS-Somewhat satisfied; S- Satisfied; VS- Very satisfied

	VD	D	SD	SS	S	VS
Routes Used	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]
Accessibility (Wait Times etc.)	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]
Accommodation	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]
Amenities e.g. food, water	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]
Rally Organization	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]

20. What is your overall satisfaction level with the entire Rally event?

Very dissatisfied	[ ]
Dissatisfied	[ ]
Somewhat dissatisfied	[ ]
Somewhat satisfied	[ ]
Satisfied	[ ]
Very satisfied	[ ]

21. Would you recommend future Rally events to your friends, relatives or colleagues at home?

No, definitely not	[ ]
No, probably not	[ ]
Possibly	[ ]
Yes, probably	[ ]
Yes, definitely	[ ]

22. What are your worst disappointments within the Rally Zone destination?

____

____

23. What do you suggest the Rally Team should have done to enhance your current experience?

____

____

Thank you very much for participating

[1] Payments by individuals, sponsors, donors and government (national and county)

[2] Investment by donors, sponsors, government (national and county) and private sector

[3] (**) This column reflects the expenditure by the tourism industries in tourism promotion or other services related to the products described, when relevant.

Appendix 5.2: Terms of References (ToR)

The terms of reference included the following:

1. To review studies on customer satisfaction in general, visitors' satisfaction and visitors' expenditure trends
2. To develop a methodology on how best to capture the required information and data
3. Develop appropriate tools to be used for the survey to capture both qualitative and quantitative information
4. Distribute data collection instruments to the targeted respondents and collect the required data
5. Review and analyze the data collected and produce an exit survey report on the following:
    - Demographic characteristics of tourists
    - Pre-visit perceptions and expectations
    - Actual tourists experience
    - Post visit perceptions
    - Tourists satisfaction levels
    - Estimated visitors' expenditure
6. Estimate economic impacts (direct, indirect, induced and total) of the Safari Rally Kenya on Country's tourism sector
7. Provide recommendations and practical action plan that TRI can use to advise the Ministry of Tourism and wildlife, other key tourism stakeholders to undertake.
8. Present the final exit survey and economic impacts reports to TRI


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