

Ministry of Tourism & Wildlife

KATA
Kenya Association of Travel Agents

TRAVELLERS' READINESS TO TRAVEL TO POST COVID-19 PANDEMIC

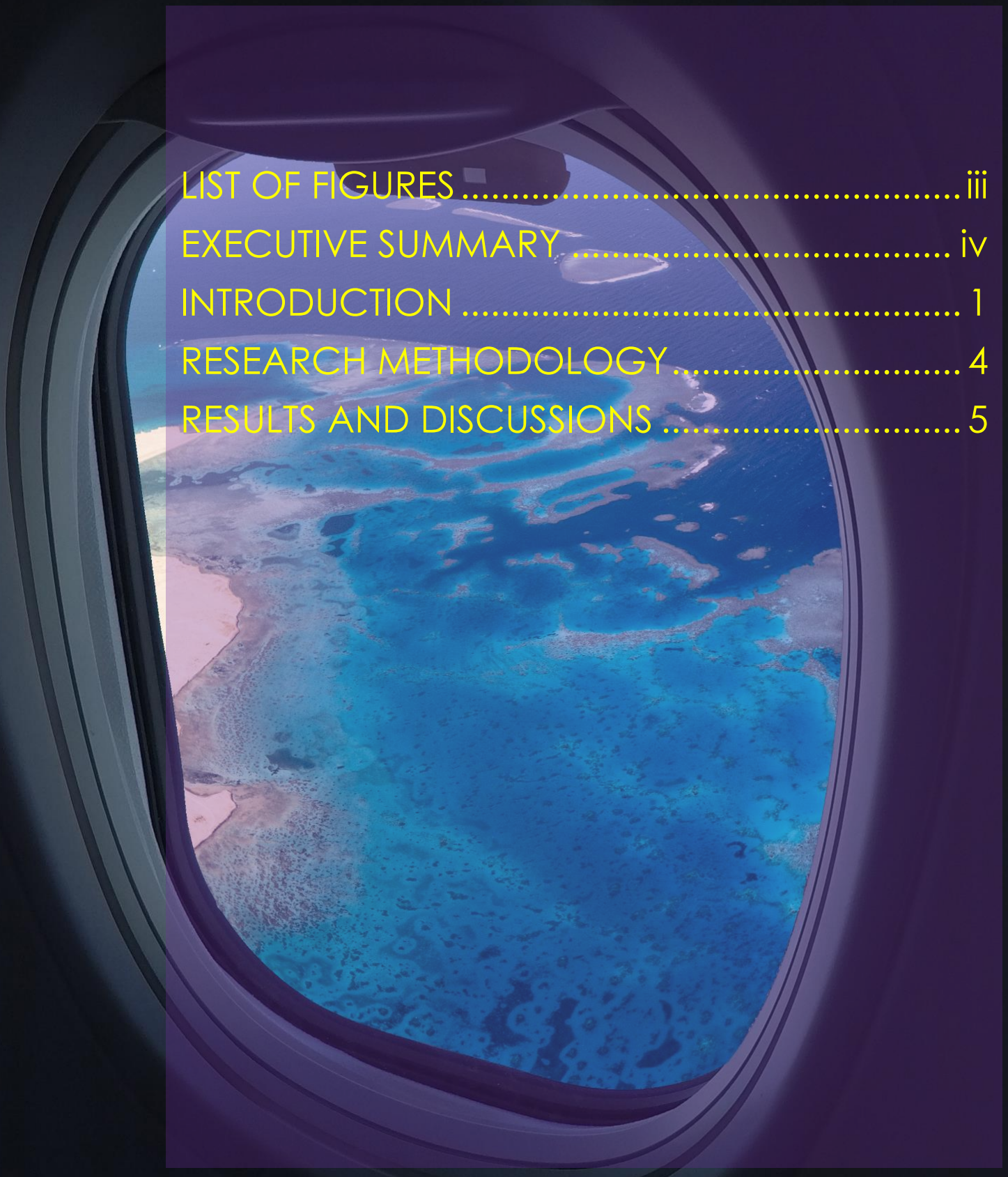
REPORT

This Research has Been Commissioned by the National Tourism Crisis Steering Committee under the Ministry of Tourism and Wildlife, Kenya, in Collaboration with Kenya Association of Travel Agents

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www.katakenya.org

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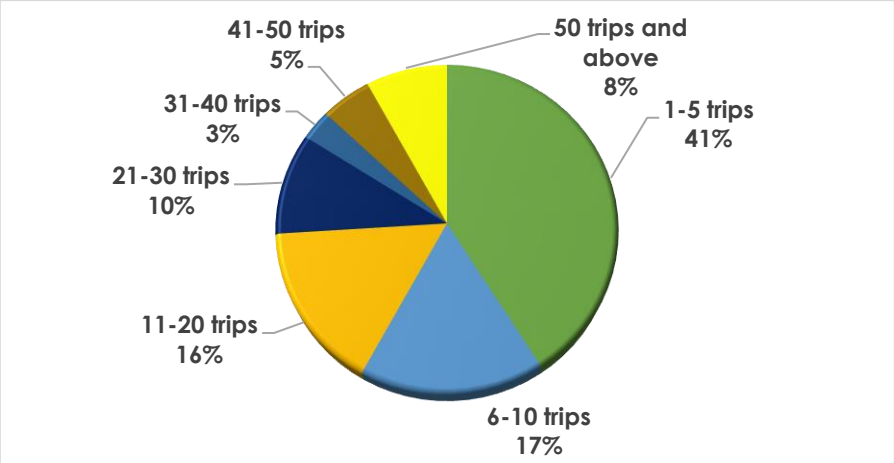
EXECUTIVE SUMMARY

Introduction

The outbreak of COVID-19 has had a major impact on the global economy with the travel and tourism industry being the hardest hit. Tourism in Kenya is one of the major economic pillars and Kenya is the third largest tourism economy in Sub-Saharan Africa (GoK, 2019). In 2018, the country's international tourism arrivals grew by 3.9% from 2.02 million tourists to 2.05 million tourists in 2019 (GoK, 2019). Domestic tourism also grew from 3,645,144 in 2017 to 3,974,243 in 2018, recording a 9.03% growth (GoK, 2019). As a person to person industry, the sector is uniquely vulnerable to crises that affect more than one geographical area. Although the tourism industry has shown great resilience to major shocks over the years, it faces major challenges ahead especially the outbreak of the COVID-19 pandemic. The pandemic shook the world and this led many governments across the globe to impose various measures such as the closure of borders and travel restrictions in order to contain the spread of the virus, in return shattering the travel and tourism industry. Even as the virus surges on, countries around the world including Kenya are implementing strategies to stimulate the recovery of the travel and tourism sector. Kenya started the year 2020 with a positive economic outlook, however, the COVID-19 pandemic is having a huge impact on the tourism industry growth. This prompted the Kenya Association of Travel Agents (KATA) to carry out a survey on the travellers' readiness to travel to post COVID-19 pandemic.

Survey Results

i) Number of Trips Completed by Travel Agents before COVID-19 in a Year



ii) Change of Travel Business as a Result of COVID-19

Based on the COVID-19 experience, over 80% of the respondents think that between 50 -75% of their business will be replaced by online meetings moving forward. Another 3 % think that all their business-related trips will be replaced by online meetings.

iii) Travellers Preparedness to Travel Again Post-COVID 19



iv) Travellers Confidence to Travel Again Post-COVID 19



v) Travellers Fear with regard to Travel Protocols Post-COVID 19

The survey findings indicate that majority of the respondents are extremely concerned with being quarantined at the destination (76%) followed by contacting COVID-19 (61%).



INTRODUCTION

1.1 Travellers' readiness to travel post COVID-19 Pandemic

The outbreak of COVID-19, a novel strain of coronavirus, has had a major impact on the global economy, with travel and tourism being the most affected sectors. The COVID-19 pandemic prompted countries to close boarders, impose travel restrictions as well as introduce quarantine measures to contain the spread of the virus, which in return caused a slump in demand among travellers (UNWTO, 2020). However, countries that halted international travel after the outbreak of COVID-19 have begun to slowly re-open boarders for travel.

Kenya was among the first countries in the world to develop and adopt the Magical Kenya Tourism and Travel Health and Safety Protocols for the 'New Normal'. The protocols were approved by the Ministry of Health in Kenya and the World Travel and Tourism Council (WTTC). Further, Kenya was awarded the Safer Tourism Seal (STS) that builds on established certifications through evaluations and endorsements. The seal provides additional assurances about the industry. In addition, Kenya's Minister of Tourism and Wildlife (Hon. Najib Balala) and the CEO of the Kenya Association of Travel Agents (Ms. Agnes Mucuha) were among the few distinguished professionals in the tourism industry in the world who were awarded the 'The Hall of International Tourism Heroes' having shown extraordinary leadership, innovation, and actions.

1.2 Purpose of the Study

Kenya started the year 2020 with a positive economic outlook, however, the COVID-19 pandemic is having a huge impact on the country's tourism industry growth. This prompted the Kenya Association of Travel Agents (KATA) to carry out a survey on the travellers' readiness to travel post COVID-19 pandemic. The study is to assist the KATA members, tourists and the entire industry with information that could assist with making informed and strategic decisions as the borders re-opened.

1.3 Specific Objectives

1. To determine the number of Company Business Trips Made per Year prior to COVID-19
2. To examine the industry willingness and readiness to start travelling again
3. To find out the Travellers' Confidence Level to Visit various areas
4. To establish the Concerns for Travel during COVID-19
5. To find out what Travel Agents could do to better prepare for the resumption of travel.



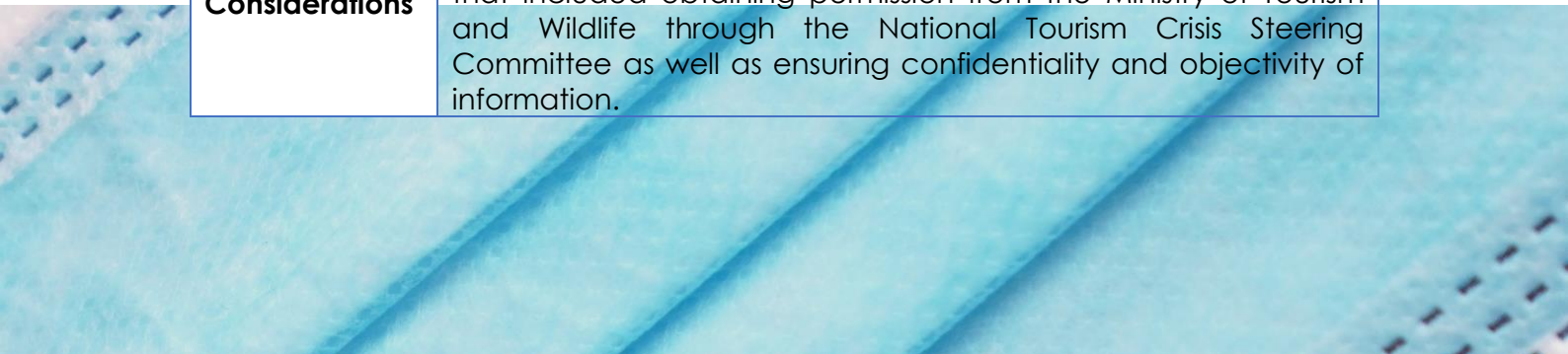


RESEARCH METHODOLOGY

Introduction

Following the Covid-19 outbreak, KATA, through the National Tourism Crisis Steering Committee (NTCSC) requested academia and industry practitioners to carry out a research study on the Travellers' Readiness to Travel Post Covid-19 Pandemic. The study adopted a cross-sectional descriptive research design. The research design was chosen due to its effectiveness and ease of access to information at a low cost. Consequently, a joint working team was formed which comprised industry experts from the academia and practitioners within the country. Due to the infectious nature of the COVID-19 pandemic, data was collected by use of online and digital platforms. Data collection took place from August to October 2020.

Target Population	A census was carried out on the whole target population that consisted of all the 198 KATA members.
Sampling Technique	The study used complete enumeration approach where all members of the whole population of the total 198 members of KATA were involved by systematically acquiring information from the members in the target population. This was preferred since the data population was small. This significantly improved the reliability of effort estimates since it does not involve frame survey data.
Research Instruments	The study used questionnaires to collect quantitative data. The questionnaires comprised close-ended questions and were administered online to the hotels in the target population.
Data Collection Techniques	The study collected primary and secondary data. Primary data were gathered using the questionnaires. To distribute the questionnaire, the CEO of KATA (MS. Agnes Mucuha) sent an online version of the questionnaire to the KATA members, and other stakeholders who submitted the filled surveys through Survey123 software. Secondary data were gathered from reports and was used to back-up primary data.
Validity and Reliability	The validity and reliability of the data collection instruments were ascertained before actual data collection. To test the validity of the questionnaire, content validity technique was used to ascertain the adequacy of the questions for the purpose of the study. This was ensured through expert reviews and judgment by the hotel sector practitioners and academia. Test-retest method was used to further ascertain the reliability of the questionnaire.
Data Analysis	Data analysis was carried out using descriptive techniques. Tables and graphical presentations were used to present the data collected for ease of understanding and analysis.
Logistical and Ethical Considerations	During the period of carrying out the research, there are certain considerations and obligations that the researchers had to fulfil that included obtaining permission from the Ministry of Tourism and Wildlife through the National Tourism Crisis Steering Committee as well as ensuring confidentiality and objectivity of information.



Response Rate

A total of 88 people responded to the survey with 89% of the respondents being from Kenya, 1% each from Rwanda, Democratic Republic of Congo and Tanzania while 8% did not indicate their country of origin.

Age of Respondents

The majority of the respondents were in the age brackets of 35-44 years (33%) and those of 25-34 years (30%).

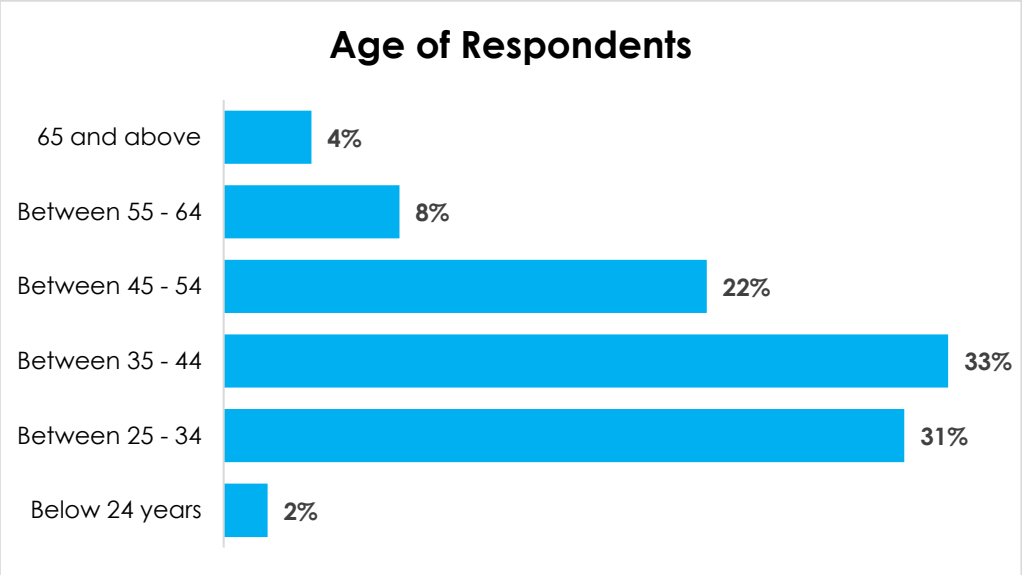


Figure 1. 1. Age of respondents

Level of Management

The analysis of the respondents' level of management within the organization show that 53% were from senior management, 31% midlevel management, and 16%-line management.

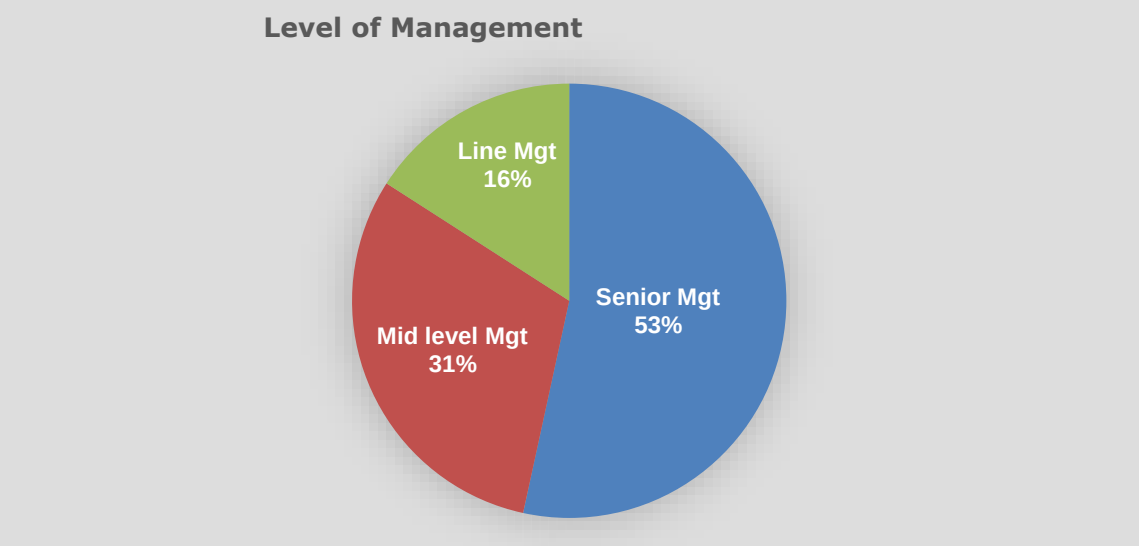


Figure 1. 2: Level of management

Company Business Trips Made per Year prior to COVID-19

Majority of the respondents (41%) indicated that their companies used to take 1 to 5 business trips per year, 6 to 10 trips (17%), 11 to 20 trips (16%). Those taking 21 to 30 trips 10%, 31 to 40 trips 3%, and those who used to take more than 41 trips per year were approximately 13%.

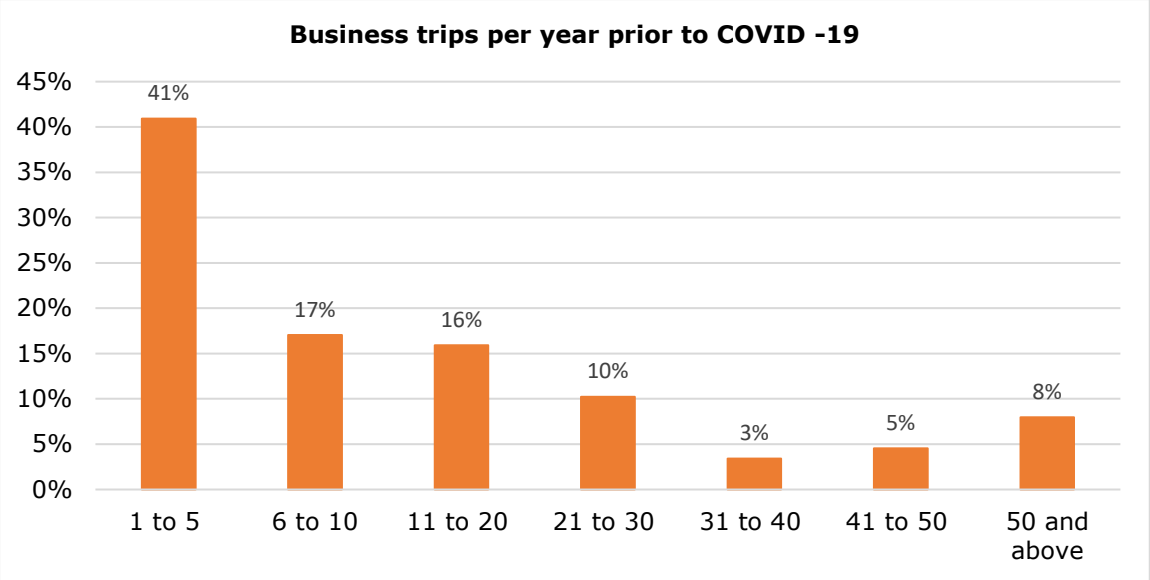


Figure 1. 3: Business trips per year prior COVID-19 pandemic

Industry/sector in which the respondents operate

The majority of the respondents were from the professional/consumer services (23%), Government (18%), and SME/MME/Start-ups (16%).

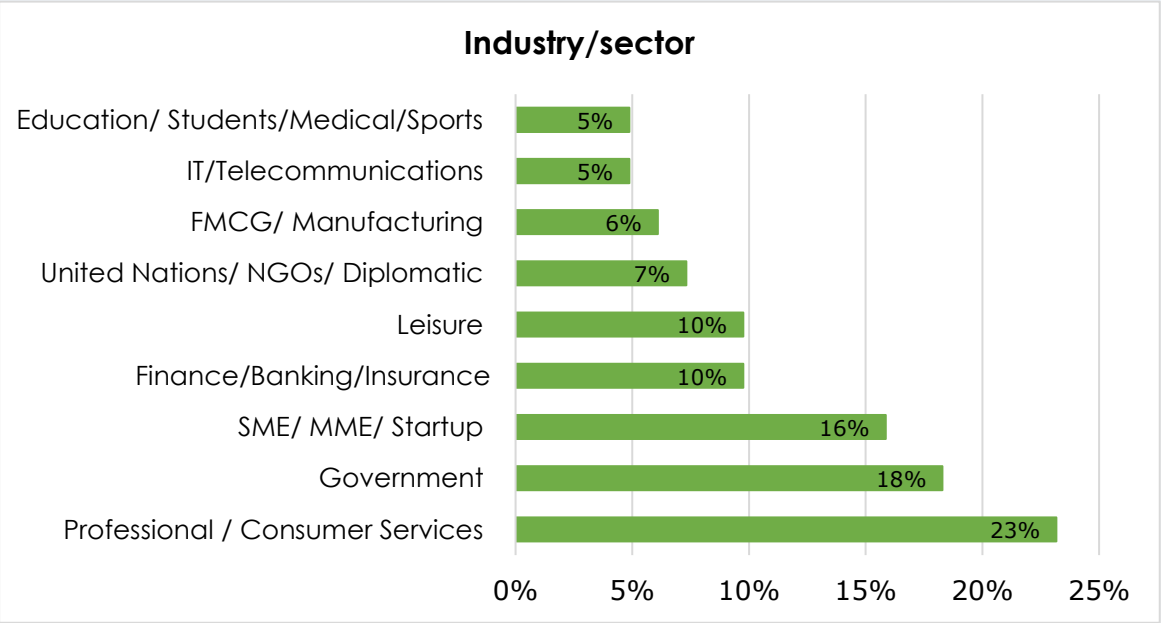


Figure 1. 4: Sectors in which respondents were working



Perceived Business Trips Likely to be replaced by Online Meetings

Based on the COVID-19 experience, over 80% of the respondents think that between 50 -75% of their business related will be replaced by online meetings moving forward. Another 3% think that all their business-related trips will be replaced by online meetings.

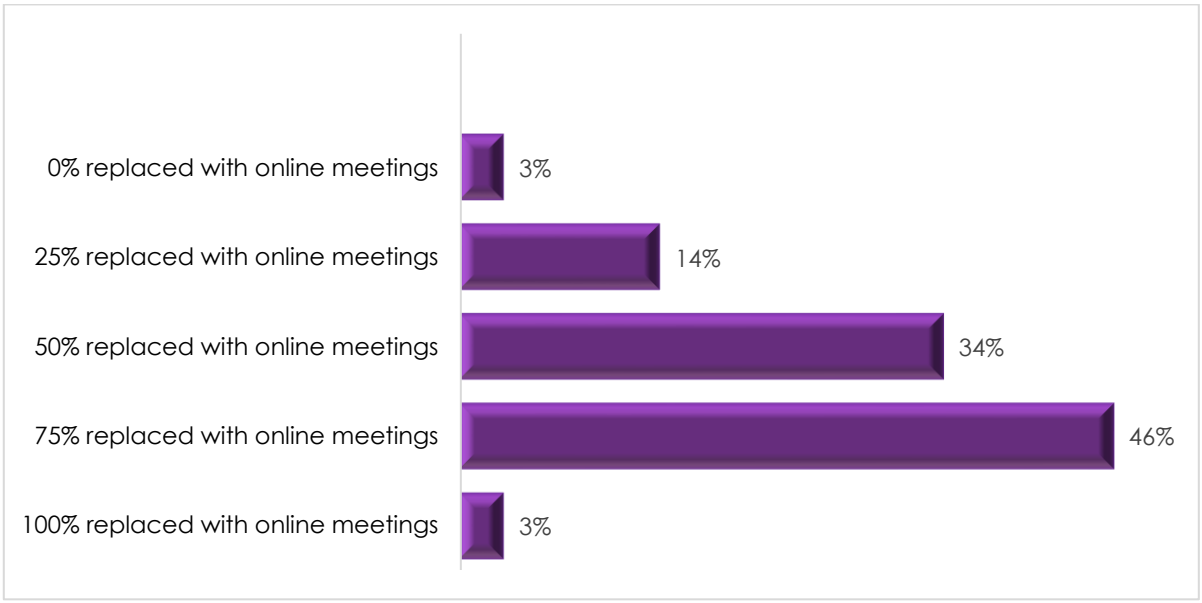


Figure 1. 5: Perceived business trips likely to be replaced by online meetings

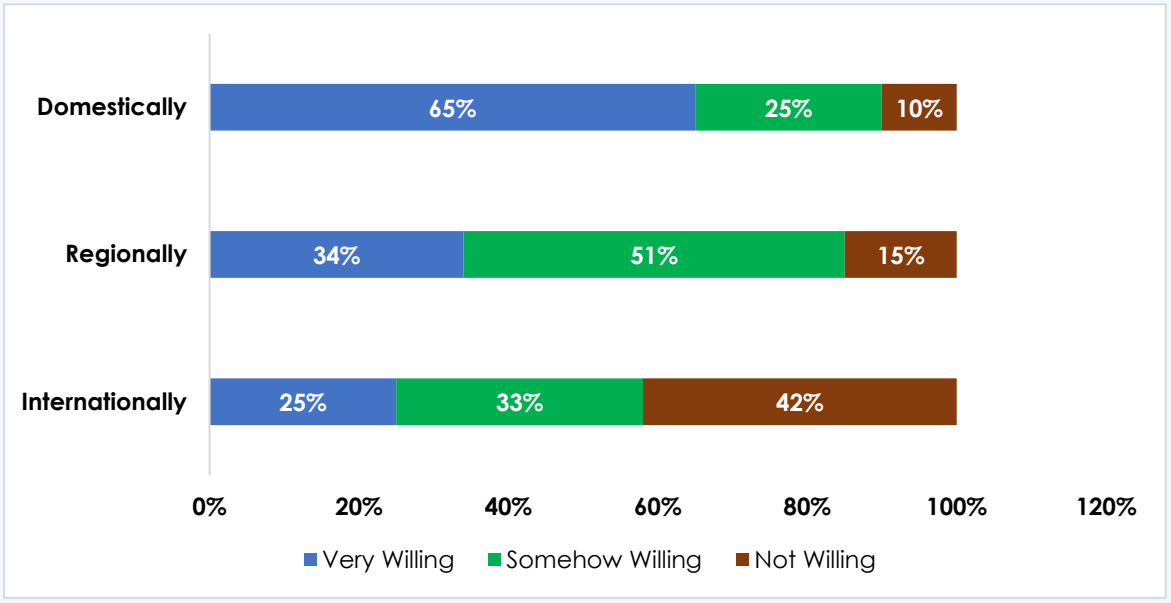


Willingness and readiness to start travelling again

According to the survey 64% of the respondents are very willing and ready to start to travel again domestically, 34% regionally and 25% are willing and ready to start travelling internationally. From the findings it is clear that travellers are still optimistic, willing and ready to start to travel again in the era of COVID-19 pandemic and domestic tourism is likely to take centre stage.

According to Elizabeth Monahan the spokesperson for tripadvisor.com, "Tourism recovery begins locally as travellers first tend to venture out closer to home, visit their local eateries, stay local for a weekend getaway or travel domestically before a robust demand for international travel returns." (www.cnbc.com).

"When people get more comfortable, they'll continue to go farther and farther away from home, starting with domestic and then moving to international, long-term," said Cheryl Golden, director of e-commerce at the Warwick, Rhode Island-based firm.



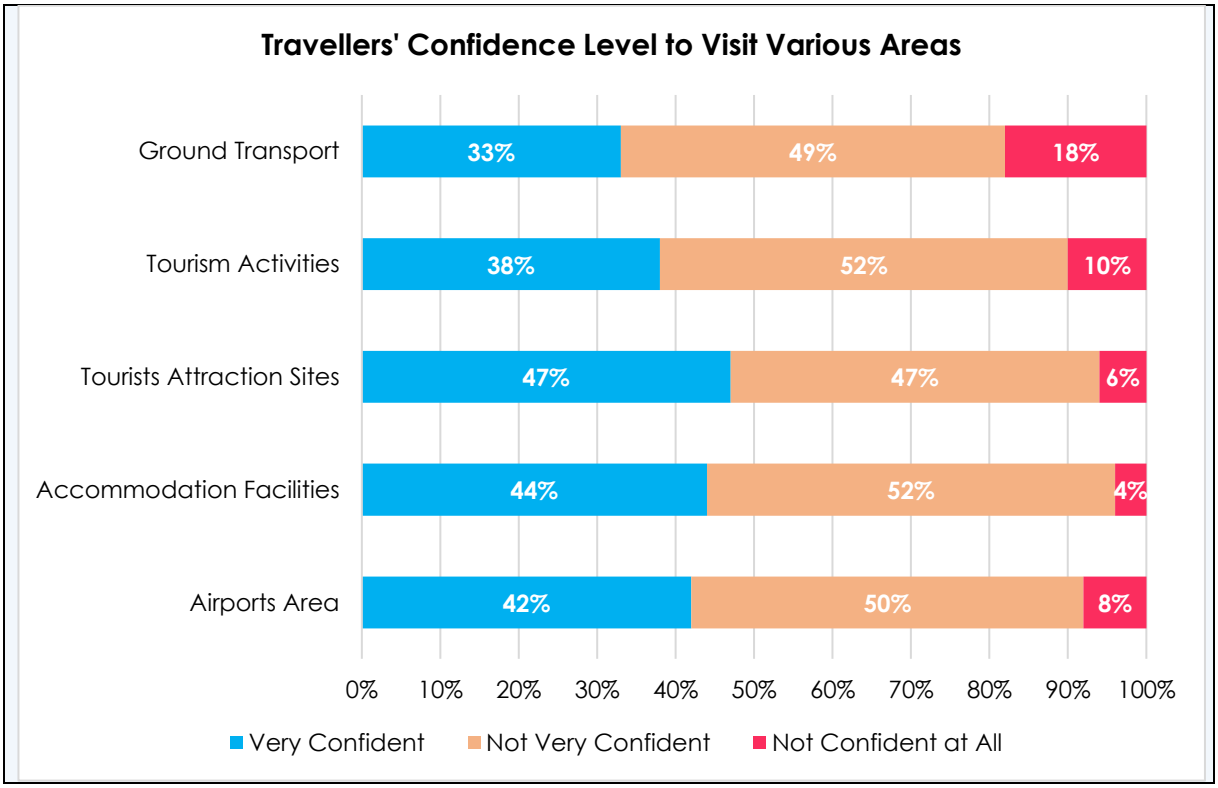
Majority 42% of the respondents are not willing and ready to start travelling again internationally, 15% regionally and 10% domestically. Further, 65% of the respondents are ready and willing to travel domestically as compared to 34% regionally and 25% internationally. This shows that there is very high potential for domestic travel recovering first, followed by regional travel and then international travel.

Erika Richter a senior director of communications at the American Society of Travel Advisors, says that "Until the virus is under control and efficient systems are in place to restore confidence in travel, it is simply too soon to tell when people can expect to start booking again".

Travelers' confidence level on visit to various areas

Safety is usually top in the minds of consumers as they look towards the recovery period and as they plan to start travelling again. The survey sort to find out how confident travellers were on visiting various areas such as the airport, accommodation facilities, tourist attractions, tourism activities and ground transport in regard to how Kenya is prepared to receive travellers under the new COVID-19 protocols.

The survey results showed that over 30% of the respondents were confident to visit major tourists' areas. They indicated that they were most confident visiting Tourist's Attraction sites (47%), followed by Accommodation Facilities (44%) and Airport area (42%). They were least confident in visiting tourists' attractions sites (49%).



There is need for the stakeholder to put more effort in building more travellers confidence given that more than 50% of the respondents indicated that they are not very confident or are not confident at all in regard to how Kenya is prepared to receive guests/travellers under the new COVID-19 protocols. According to a survey conducted by PwC on how to restore confidence in travel during an uncertain time, travellers are looking forward to travel again. However, consumers are seeking destinations that are adequately equipped with health facilities as any environment that requires being around a lot people may have risks (www.pwc.com).

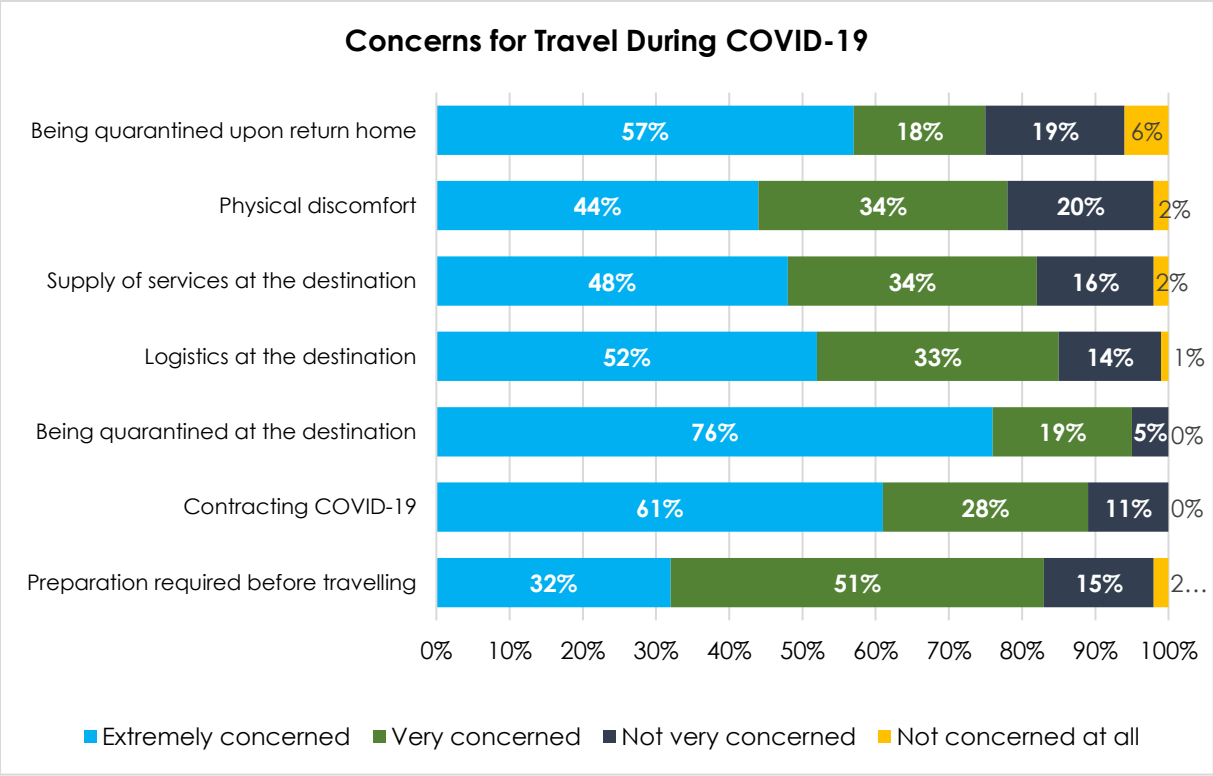
An IATA public opinion research shows that people are willing to travel. However, this is being tampered by concerns of catching the COVID-19 virus during air travel. The findings of the survey indicate that travellers are taking precautions to protect themselves from COVID-19, 77% indicated that they are washing their hands more

frequently, 71% are avoiding large meetings and 67% having worn a facemask in public. Some 58% of those surveyed said that they have avoided air travel, with 33% suggesting that they will avoid travel in future as a continued measure to reduce the risk of catching COVID-19 (www.iata.org). Thus, reassuring travellers by the practical measures being introduced by the government and the industry are observed and adhered to by all as they are crucial in restoring the travellers' confident.

Concerns for travel during COVID-19 pandemic

The survey sought to find out the travellers' level of concern in regard to the preparation required before travelling, contracting COVID-19, being quarantined at the destination, logistics at the destination, the supply of services at the destination, physical discomfort, and the issue of being quarantined upon return home.

The findings indicated that the majority of the respondents are extremely concerned with being quarantined at the destination (76%) followed by contacting COVID-19 (61%). Travellers are clearly concerned about COVID-19 and are taking precautions to protect themselves and stay safe with one of the biggest fears for travellers being quarantined.



A WTTC report on the future of travel and tourism in the wake of COVID-19 is clear that travellers' behaviour and preferences have shifted towards the predictable, familiar and trusted. According to the report, 58% of travellers plan to take domestic trips for the rest of 2020, 80% fear the potential of quarantine as much as contracting the virus and 69% indicated cleanliness and health measures as a critical component of travel brands' crisis response (WTTC, 2020).

Another survey conducted by MMGY Global in September 2020 on the travel intentions of U.S business and leisure travellers, domestic trips were the preferred way to vacation. However, the perceptions of safety for domestic travel, lodging, transportation and business travel were the travellers' highest concerns since the start of the pandemic (www.mmgyintel.com).

What can travel agents do to better prepare you to travel again?

- Work with travellers to help them understand the COVID-19 protocols of both the source country and the destination country.
- Push with airline companies to make mandatory a negative test to board an aircraft (as KQ did).
- Push for the relaxation of Covid-19 restrictions for regional travellers, especially the Covid-19 certification for asymptomatic travellers.
- Share adequate information with clients as well as provide regular update on travel resumption readiness.
- Provide travellers with adequate information and regular updates on travel regulations, covid-19 restrictions, all protocols and requirements for travel to various destinations.
- Properly advise on COVID-19 testing and quarantine measures in all countries.
- Offer a Covid-19 travel guide for Kenyans, offer a safety guide for Covid-19.
- Observe and adhere all Covid-19 Protocols without any compromise.
- Mitigate the acquiring of the COVID-19 certificate.
- Make sure destinations and mode of transport is adhering to COVID-19 19 rules.
- Lobby for increased safety protocols at airports and in the airplanes both locally, regionally and internationally.
- Ensure to communicate Covid-19 guidelines for each country.
- Ensure that everyone is conversant with all the Covid-19 protocols.
- Ensure that all protocols by MOH on COVID-19 are adhered to by the service providers' right from before boarding all the way to the airport and destination /accommodation.
- Provide regular update on travel resumption readiness and appeal for removal of testing at the border points.
- Provide information on COVID regulations at destination before travel, and whilst away.



Please share more information on your travel plans.

- Ready to travel internationally once international travel opens.
- Planning for local travel and likely not international.
- No plans to travel until the pandemic is under control and protocols put in place.
- Likely to start to travel in 2021.
- Would travel more as my line of work dictates best practice learning for quality service delivery.
- Hoping to kick off in December my travel plans once things ease up.
- Frequent trips to head Office based in UK. Substantial travel within East Africa and Domestic routes.
- Am still willing to travel should the restrictions be eased.
- Some international travels are planned but our regional trips are cancelled until further notice
- Not intending to travel internal until there is a vaccine against covid-19 or the pandemic is completely under control.
- Plan monthly travel to Mombasa and likely not internationally.
- Mostly within East Africa, avoiding international COVID hotspots if possible.
- I am to travel to Mombasa and Somalia and Nanyuki and Nakuru - October to December this year.





Report by:

Global Tourism Resilience & Crisis Management Centre (GTRCMC) Eastern Africa

KENYATTA UNIVERSITY

GTRCMC – EA

Kenyatta University

P O Box 43844 – 00100

Nairobi, Kenya

Email: gtrcmc@ku.ac.ke
Website: http://www.ku.ac.ke/gtrcmc

In collaboration with:

KATA
Kenya Association of Travel Agents

HARAMBEE
Ministry of Tourism & Wildlife

The Address 10th Floor

Muthangari Drive, Off Waiyaki Way

P.O Box 10290 – 00100, Nairobi, Kenya.

Email: info@katakenya.org

Phone: +254 792 000 835

+254 (0)738 617 499

NSSF Building, Block A
15th Floor, Eastern Wing.

P.O. Box 30027, Nairobi
+254-020-2724646