REPUBLIC OF KENYA

MINISTRY OF TOURISM AND WILDLIFE



RESEARCH REPORT ON

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

Executive Summary



www.tourism.go.ke

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

June 2020

PREFACE

The National Tourism Crisis Steering Committee was appointed by the Cabinet Secretary, Ministry of Tourism and Wildlife to among others, "*be the crisis management co-ordination, response and steering organ for any crises in the tourism industry*" and gazetted on 27th March 2020, *Gazette Notice No. 2701*. In execution of its mandate, the Committee in collaboration with several agencies that included Tourism Research Institute, Kenya Tourism Board and the Kenya Wildlife Service as well as the Kenya Tourism Federation, commissioned this study that was spearheaded by Kenyatta University entitled the *'Impact of COVID-19 on Tourism in Kenya, the Measures taken and the Recovery Pathways'*. I therefore wish to thank these institutions, particularly the Kenyatta University team coordinated by Dr. Esther Munyiri, for their invaluable support.

Tourism is one of the key sectors in Kenya's economy and its resilience is critical for socio-economic development and sustenance of livelihoods in the Country. Despite its remarkable growth over the years, the sector has however witnessed unprecedented reversals, not only in Kenya but globally, occasioned by the Corona Virus pandemic. COVID - 19 was reportedly first detected in Wuhan, China in December 2019 and rapidly spread around the world, shutting down the global economy.

This report is a culmination of collaborative efforts by various stakeholders whom despite the current situation in the Country due to the COVID-19 pandemic, participated in this research that was principally aimed at finding ways in which the tourism industry can be reset when the pandemic has been contained.

All stakeholders in the industry were represented during the research journey, and we are truly grateful for their support. We look forward to the continued good working relations not only during this period, but also in the future as we jointly strive to take the sector to greater heights.

The completion of this research could not have been accomplished without the support provided by the Principal Secretary, Hon. Safina Tsungu, CBS, to examine matters that have affected tourism in the wake of the pandemic.

Lastly, I'd like to appreciate the leadership role provided by the Cabinet Secretary, Hon. Najib Balala, EGH, to enhance resilience of Kenya's tourism sector during this period. This will ensure that the gains made so far in the tourism sector are not eroded by the COVID-19 pandemic.



MR. JOSEPH KIPCHIRCHIR BOINNET, MGH
CHIEF ADMINISTRATIVE SECRETARY (CAS)
MINISTRY OF TOURISM AND WILDLIFE

EXECUTIVE SUMMARY

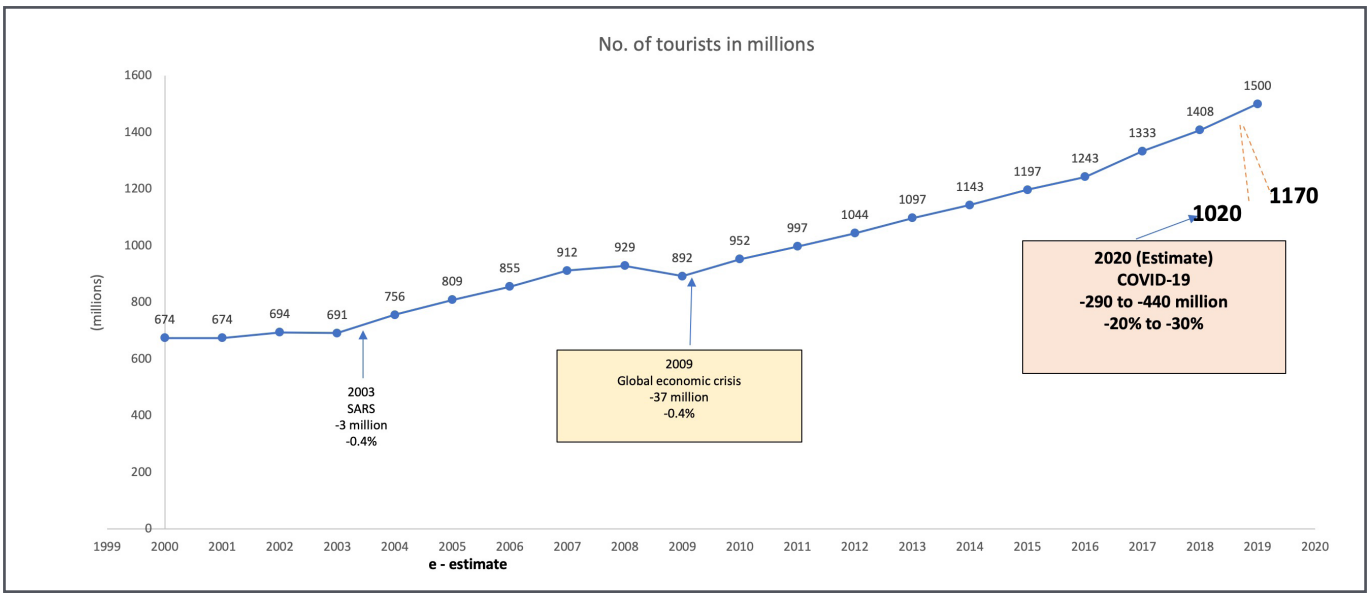
Introduction

1. There has been an extraordinary growth of tourism recorded in 2020 in the world (1.5 billion), Africa (71.2 million) and Kenya (2.05 million).
2. The COVID-19 emerges as one of the greatest challenges facing the world today and threatening the achievements made in the travel and tourism industry.
3. The first case of COVID-19 was reported on 12th December, 2019 in Wuhan City of China. Since then, there were over 5.9 million known cases of COVID-19. Over 360,000 deaths and over 3 million recoveries had been recorded as at 31st May, 2020. Over 3 million cases were active.
4. Tourism is currently one of the most affected sectors worldwide. The UNWTO has emphasized the need to 'putting people and their wellbeing first' through the slogan; 'By staying home today, we can travel tomorrow'. The WHO declared COVID-19 a pandemic on 11th March 2020. Since then, the COVID-19 virus has spread to over 200 countries globally.
5. The airline sector of the tourism industry is adversely affected.
6. There is a ban on international travel worldwide, including Kenya.
7. The COVID-19 outbreak could cause 50 million job loses; which may translate to a global loss in tourism revenue of about USD30 to USD50 billion in 2020.
8. Airline loses are estimated to be more than US$113 billion in revenue in 2020 in the world.
9. Exhibitions have lost over USD145 billion from cancelled contracts worldwide.
10. Airlines in Africa had incurred a combined $4.4 billion in losses by 11th March 2020.
11. Associated revenue losses could reach $125 million while 36,800 jobs would also be at risk in African in 2020.
12. MICE sector could lose roughly KSh163.56 billion in Kenya.
13. WTTC has called on governments to remove or simplify visas wherever possible, cut travel taxes and introduce incentives once the epidemic is under control. WTTC also has encouraged flexibility in the sector, so that travelers can postpone and not cancel their plans.
14. Ministry of Tourism and Wildlife, in mid-March 2020 set aside Sh500 million for the country's post coronavirus recovery plan.
15. Several Recovery strategies have been recommended in this report.
16. The COVID-19 emerges as one of the greatest challenges facing the world today and threatening the achievements made in the travel and tourism industry.
17. Among other sectors, the tourism industry is the hardest hit by COVID-19 pandemic globally, Kenya not an exception.
18. This called for a research commissioned by the Ministry of Tourism and Wildlife of Kenya to investigate the impact of COVID-19 on Tourism: measures taken and recovery pathways.
19. The study collected data from 10 CEOs of Tourism State Corporations, 11 CEOs' of Tourism Associations, 47 officers of County Executive Committees (CECs) and 360 key tourism stakeholders (from the accommodation sector, attractions, destination management organizations, exhibition centers, travel agents, tour operators, event organizers, restaurateurs, and airline operators.



Tourism Growth in the World

The last six decades have seen an extraordinary growth of travel and tourism industry. In 2019, the tourism industry contributed 10.4% of global Gross Domestic Product (GDP) or a value of over US$8.8 trillion. The industry directly created 1 in every 10 jobs globally, an equivalent of 319 million jobs. Despite occasional shocks, international tourist arrivals have shown impressive uninterrupted growth—from 25 million in 1950, to 278 million in 1980, 528 million in 1995, 952 million in 2010, 997 million 2011, 1,044 million in 2012, to 1.5 billion in 2019. Year 2019 was the tenth consecutive year of sustained growth since 2009, at 3.9%, although slower compared to the exceptional rates of 2017 (+6%) and 2018 (+6%) (UNWTO, 2020a; WTTC, 2020a).

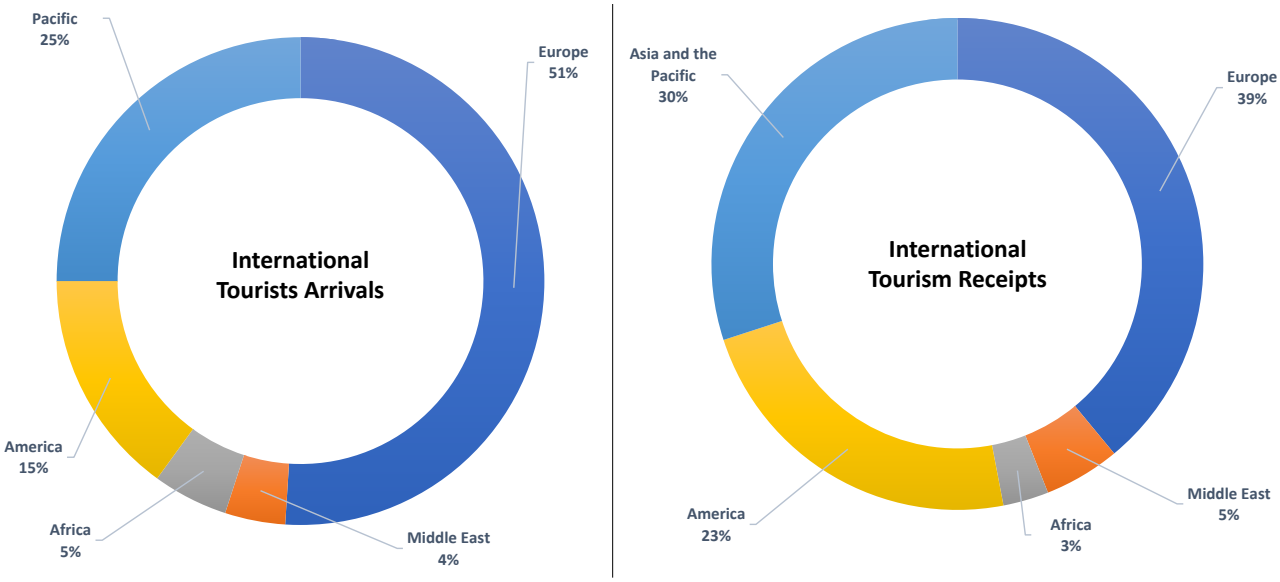


Tourists Numbers in the World

Source: UNWTO (2020a)

Africa

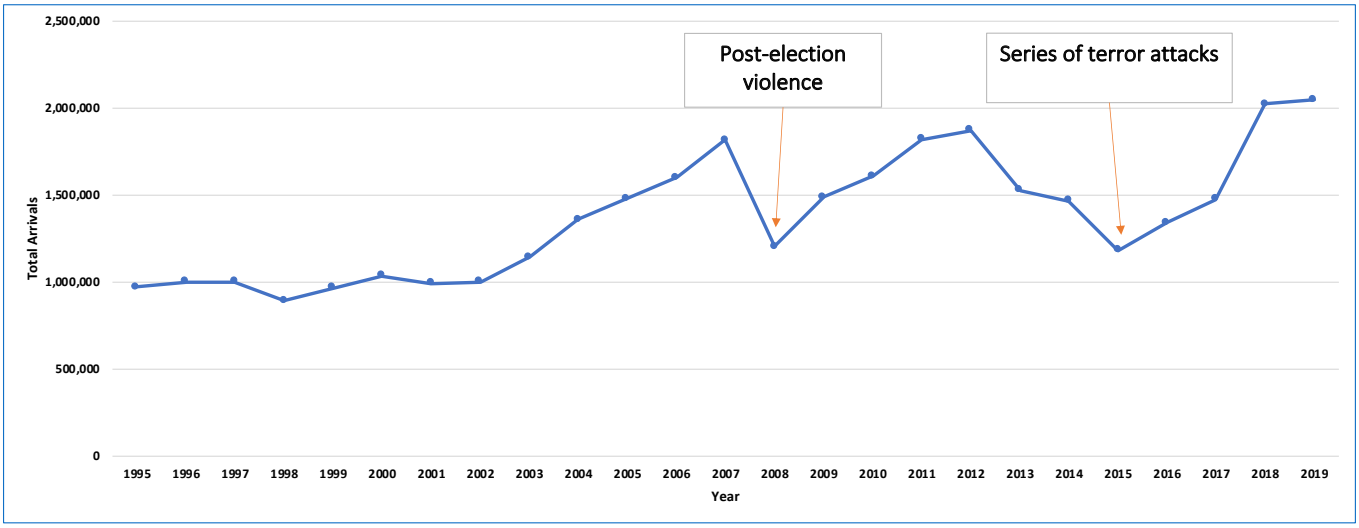
According to the World Travel and Tourism Council, tourism is one of the most important industries in Africa and contributed 8.5% (or $194.2bn) of the continent's Gross Domestic Product (GDP) in 2018 (African Travel and Tourism Association [ATTA], 2019).



The sector contributed 24.3 million (6.7%) of total employment. Domestic spending accounted for 56% of the tourism economy while 44% for international tourism spending comprised 9.6% of the region's total exports, worth $58.5bn (WTTC, 2020a). However, this impressive growth accounts for only 3% of the world share of international tourism receipts.

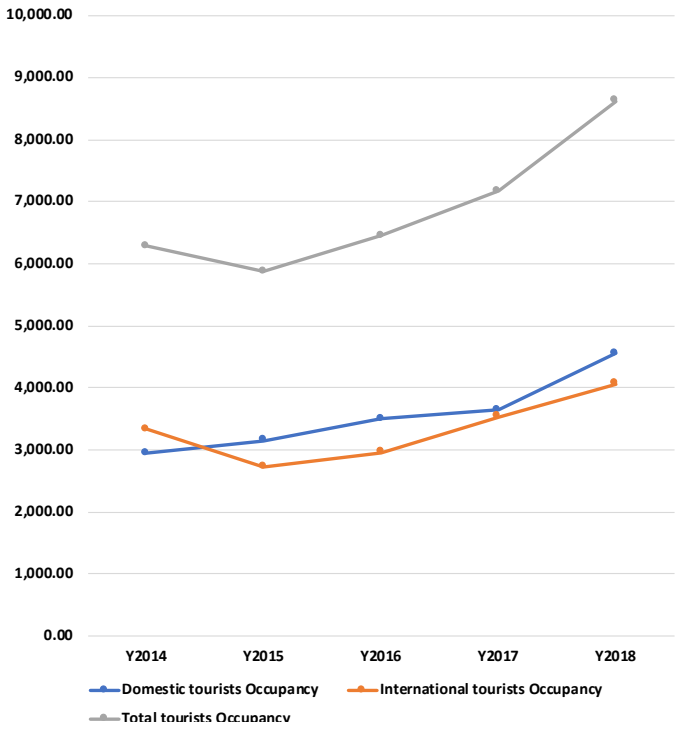
International Tourist Arrivals in Kenya from 1995 to 2019

Kenya has shown an impressive performance in the tourism sector since 2015. The country's tourism arrivals grew by 3.9% from 2.02 million tourists in 2018 to 2.05 million tourists in 2019 (Standard Media, 2020) after a 37.33% from 1.47 million in 2017. Domestic tourism numbers in Kenya grew from 3,645,144 in 2017 to 3,974,243 in 2018, recording a 9.03% growth (Standard Media, 2020).



International Arrivals in Kenya

Domestic Tourism Growth in Kenya



Tourists Bed-nights Occupancy (000's)

Domestic tourism is the main driving force of the Travel and Tourism sector in major economies globally, accounting for 73% in 2017 and 71.2% in 2018.

In Kenya, domestic tourists' bed-night occupancy accounted for more than 50% of the total bed occupancy from 2015-2018. The number of domestic tourists bed-nights has increased from 2,948,000 in 2014 to 4,559,000 in 2018.

Domestic travel supports and develops local and national economies, provides a rationale for infrastructure upgrading, disperses visitors geographically across regions and to least-visited rural areas, bridges the seasonality gap, creates employment opportunities and cushions destinations in times of crises.

Reasons for the Impressive Tourism Growth in Kenya

01 Political stability.

02 Improved security situation.

03 Growth in the aviation sector.

04 Investor confidence.

05 Withdrawal of travel advisories.

06 Visits by foreign dignitaries.

07 Open border policy.

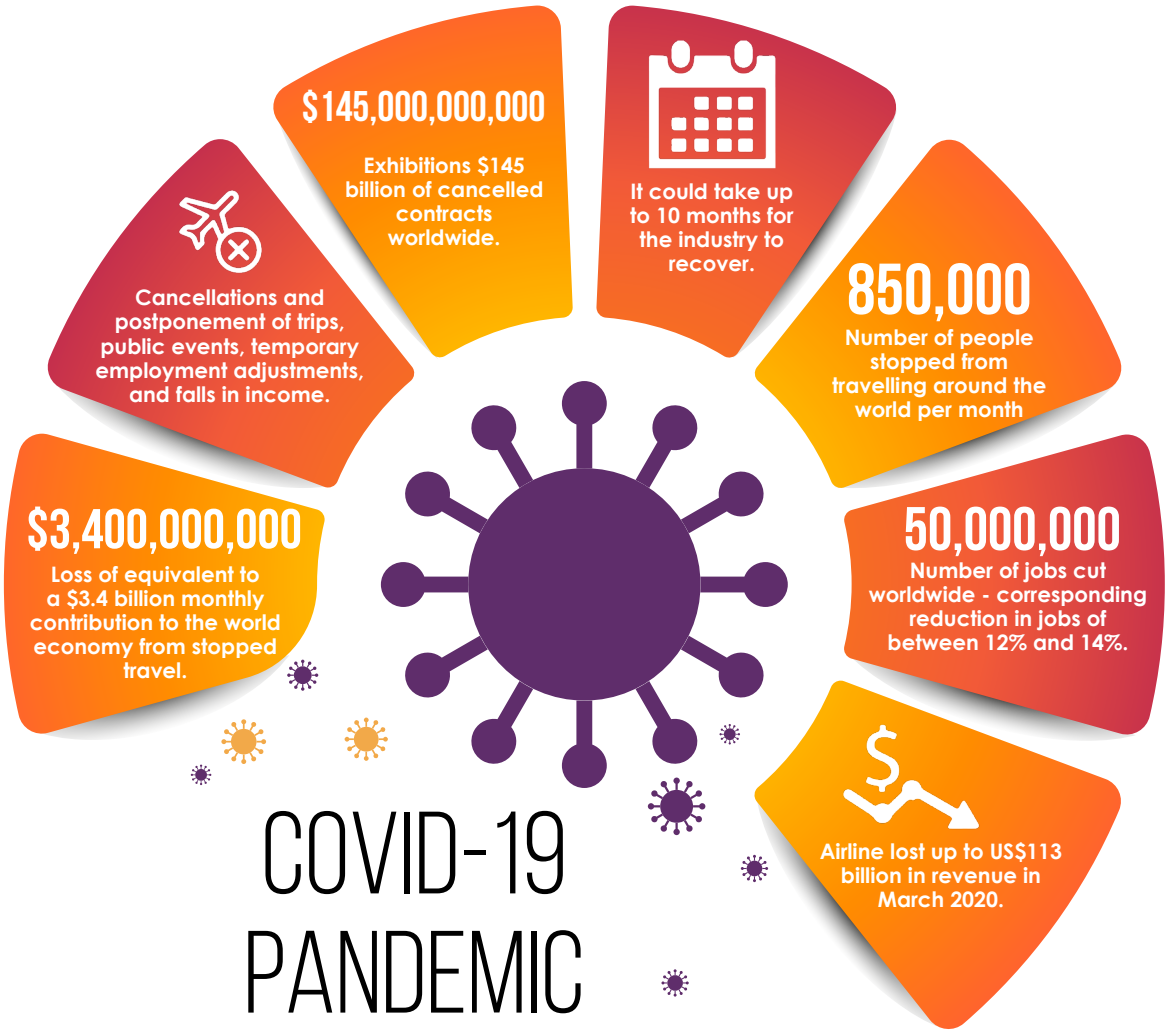
08 Revitalized marketing efforts.

09 Hosting of international conferences.

10 Growth in shared economy.

11 Africa open skies.

Impact of COVID-19 on Global Tourism



According to UNWTO (2020), the COVID-19 Pandemic has further resulted to the following:

Closure of destinations

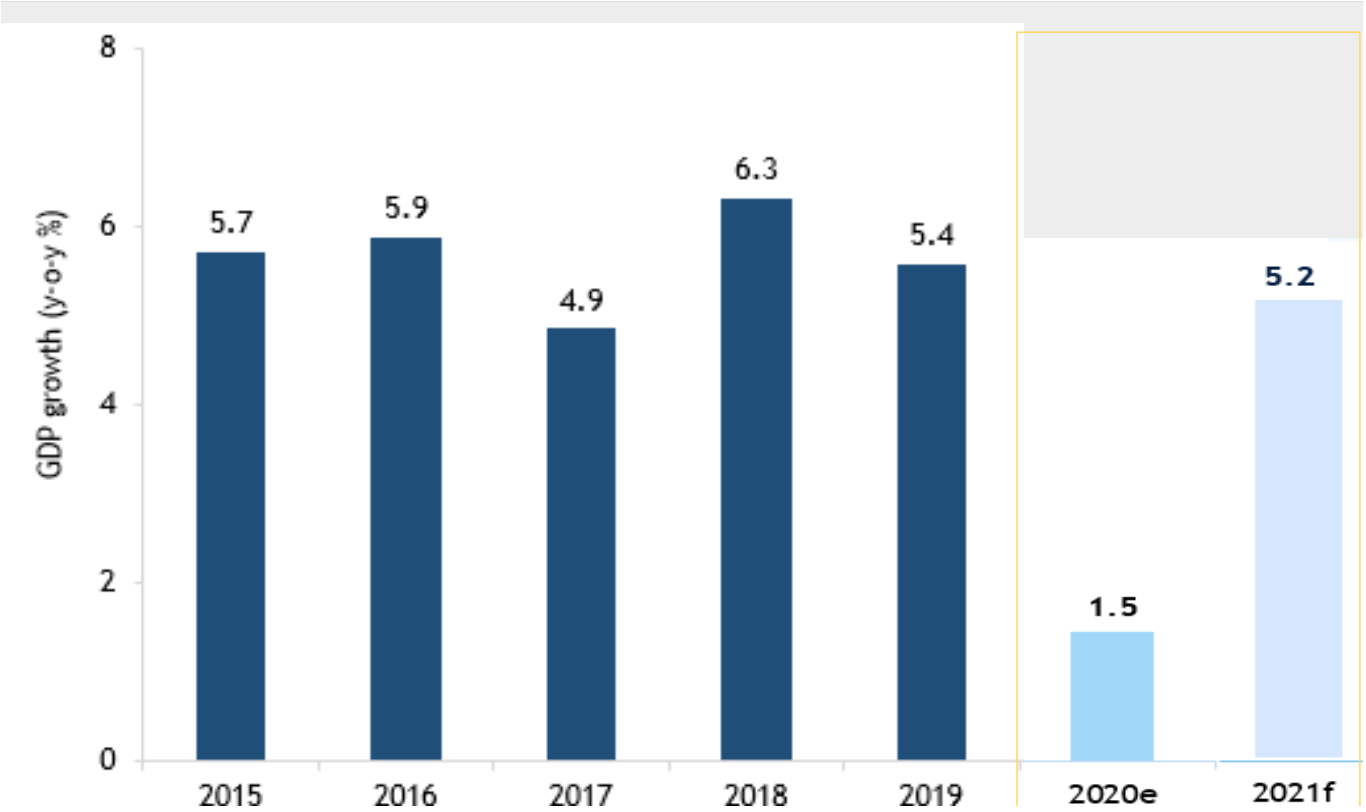
- 96% of all worldwide destinations have introduced travel restrictions
- Around 90 destinations have completely or partially closed their borders to tourists.
- 44 destinations are closed to certain tourists depending on country of origin.

Restriction of movements in and out of destinations (as of 6th April, 2020):

- Africa, Asia and the Pacific and the Middle East - 100%
- America - 92%
- Europe - 93%.

Impact of COVID-19 on the Kenyan Economy

According to World Bank (2020), although Kenya entered the crisis with considerable resilience, the pandemic will have a huge negative impact on its growth.



The baseline assumes containment measures will last for two months. An adverse scenario assumes containment measures stays until after the second half of 2020.

Impact of COVID-19 on Tourism in Kenya

HOTELS

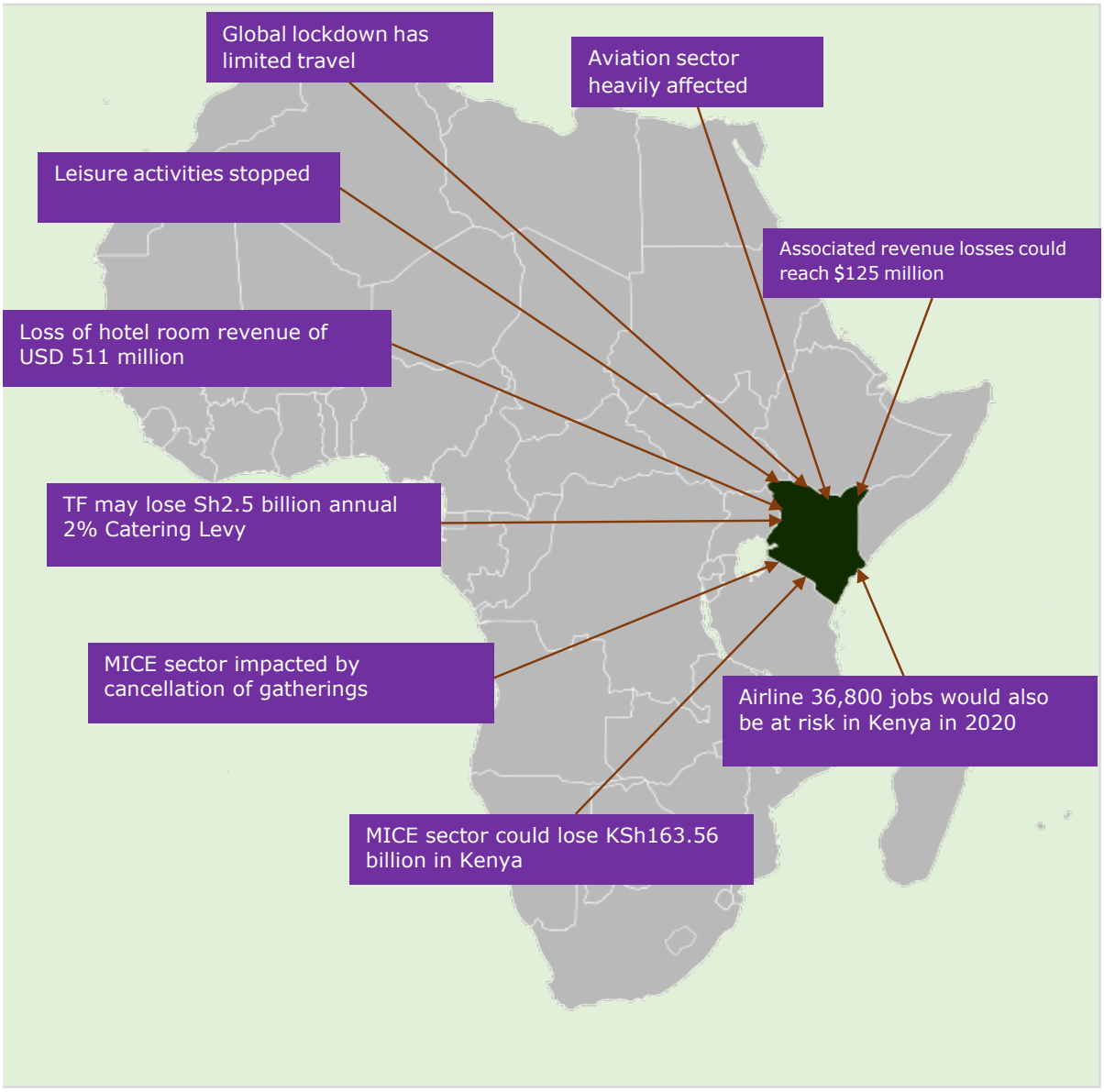
Although the pandemic came during the low tourist season in Kenya, the hotel sector has experienced an abrupt and unprecedented drop in hotel demand that has led to closure of most hotels. Consequently, some hotels have consequently sent some staff on paid and unpaid leaves.

AIRLINES

An escalation in the crisis could see passenger volumes fall by 1.6 million and $320 million in lost revenues.

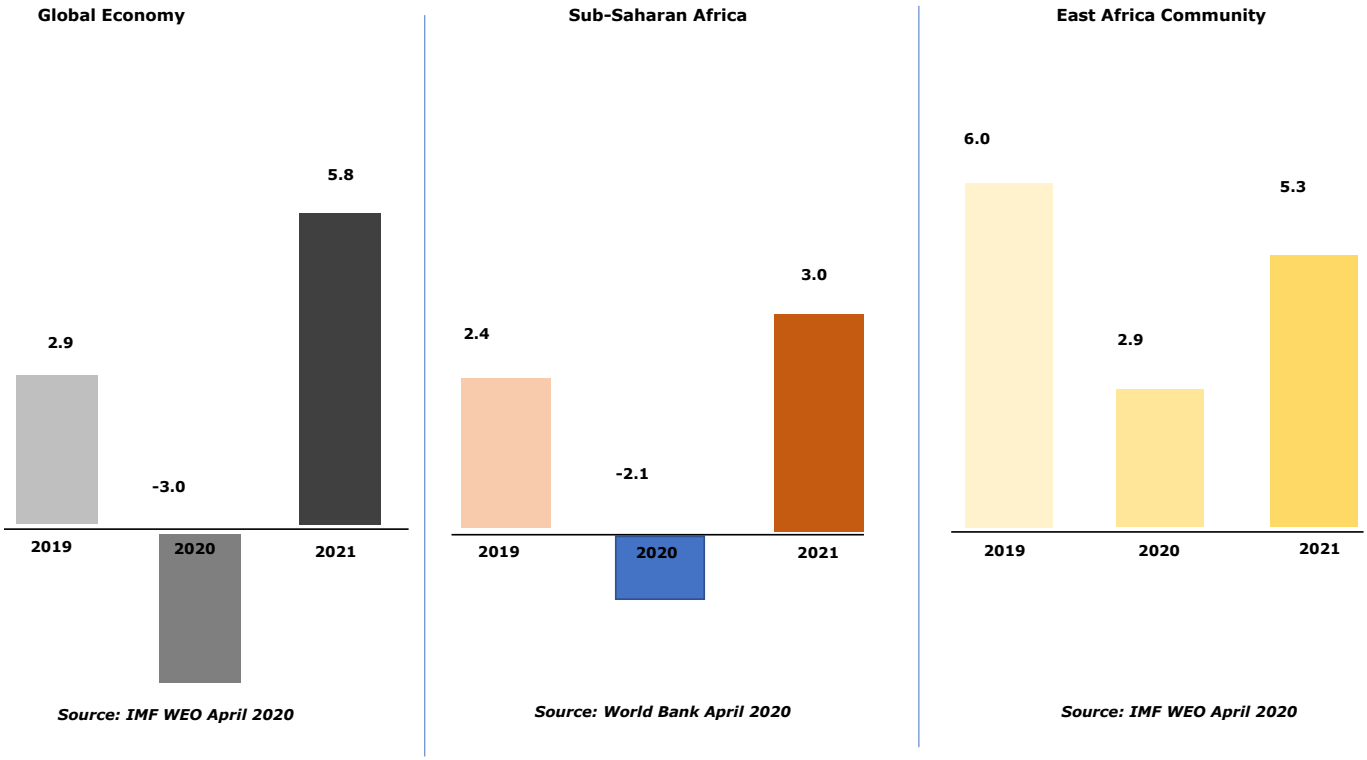
MICE

MICE contributed 13.5 percent of the total 2,048,834 international arrivals in 2019 in Kenya, where at least 276,592 visitors participated in meetings and business. The sub-sector remains key in Kenya tourism receipts which in 2019 grew by 3.9% to KSh163.56 billion, which is threated by COVID-19 pandemic.



Impact of COVID-19 Pandemic on Real GDP Growth Projections (%)

According to World Bank (2020), due to COVID-19 pandemic, a major recession is underway for the regional and global economy in 2020 with a drop of real GDP to -2.1 in Sub-Saharan Africa and 2.9 in Eastern Africa Community.



Source: IMF WEO April 2020

Source: World Bank April 2020

Source: IMF WEO April 2020

Impact of COVID-19 Gross Ticket Sales Comparison – *Kenya (USD and KES Millions)*

(USD Millions) - Gross Ticket Sales Comparison - Kenya					
	January	February	March	April	YTD
2019	56.86	33.52	39.98	37.66	2,187.02
2020	33.11	31.31	10.75	0.03	75.2
Variance	-44.77%	-6.57%	-73.11%	-1.00%	-0.05%

(KES Millions) - Gross Ticket Sales Comparison - Kenya					
	January	February	March	April	YTD
2019	615.17	386.18	443.54	407.2	1,852.09
2020	339.48	285.43	108.9	-2.45	731.36
Variance	-44.81%	-26.09%	-75.45%	-100.60%	-0.61%

Source: KATA Sales Report 2020

Global Measures to Combat COVID-19

Description of the measure taken

WORLD TRAVEL & TOURISM COUNCIL

Calls countries to:

- Guide businesses to access potentially life-saving loans, and tax breaks, to prevent them from imminent collapse.
- Protect the salaries, incomes and jobs of the millions of people who are at risk.
- Extend vital, unlimited interest-free loans to provide liquidity to large and small Travel & Tourism businesses to prevent them from collapse.
- Waive or remove all dues, taxes or fiscal charges for 12 months that affect cash flow which can be critical to businesses survival.

UNWTO World Tourism Organization

- Has stressed the importance of international dialogue and cooperation.
- Ensure, with WHO, that health measures are implemented in ways that minimize unnecessary impact on international travel and trade
- Emphasizes tourism's proven resilience and by standing ready to support recovery.
- On 6th April, 2020, UNWTO recommended that mitigating the impact on employment and liquidity, protecting the most vulnerable and preparing for recovery, must be our key priorities.

Specific recommendations

- Mitigating the impact: Supporting self-employed workers, ensuring liquidity, promoting skills development and reviewing taxes, charges and regulations relating to travel and tourism.
- Accelerating Recovery: financial stimulus - favorable tax policies, lifting travel restrictions soon, promoting visa facilitation, boosting marketing and consumer confidence. Tourism to be placed at the center of national recovery policies and action plans.
- Build resilience learning from the lessons of the current crisis - governments and private sector to build preparedness plans.

ufi The Global Association of the Exhibition Industry

- Governments to secure the future of exhibition sector through imminent subsidy and credit programmes.
- Many of MICE facilities worldwide are supporting the emergency response to the crisis in their respective cities, building temporary shelters and installing beds in case local hospitals are unable to cope with demand.





COVID-19: Measures to Support Travel and Tourism (Top 5 Most Competitive Countries)

SPAIN
- Temporary collective layoffs aid
- Support businesses
- Guaranteeing liquidity for businesses
- Supporting research
- Liquidity injection of EUR 14 billion

USA
- Seeking for US$ 850 billion stimulus package
- Injecting cash into the economy
- Support for small businesses and aid for the airline industry
- US$ 50 billion secured loans for airline
- Loans for employers with 500 employees for 8 weeks

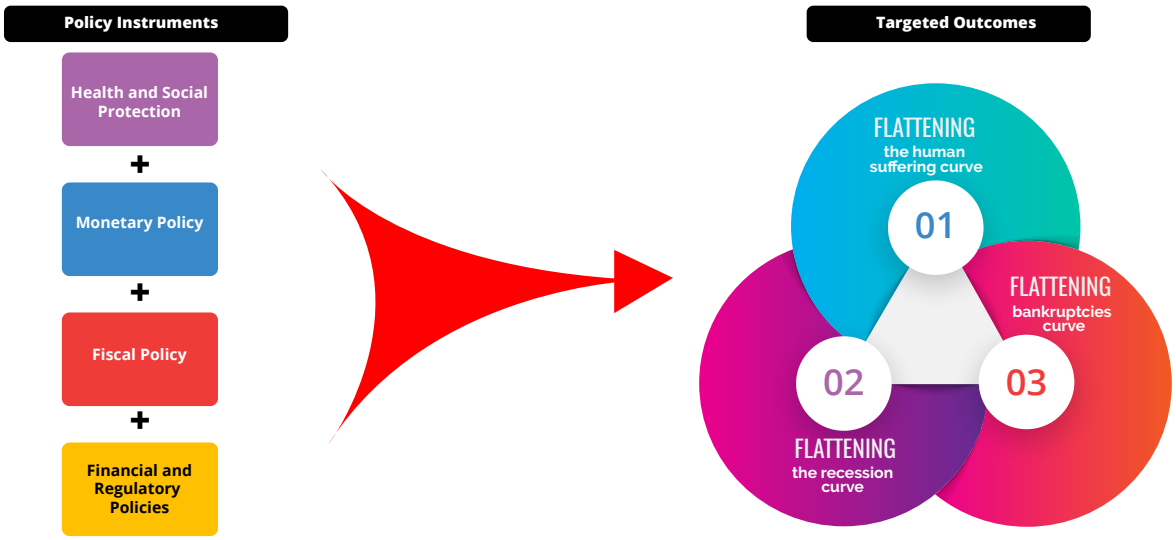
FRANCE
- EUR 45,000 million - "Immediate" support plan for workers and companies
- EUR 300,000 mill - loan guarantees
- A plan to protect threatened companies
- EUR 2,000 million - "solidarity fund" for small businesses especially catering companies & tourism sector
- Deferral of the payment of taxes, rents, water, gas and electricity bills for the smallest businesses
- Aid of EUR 1,500 for the smallest enterprises
- EUR 300 billion to guarantee bank cash lines
- 3,600 businesses and 60,000 workers to claim "technical unemployment" or "partial activity"

JAPAN
- 1,679.4 billion yen - Measures to stimulate tourism demand in Japan
- 10.2 billion yen - Creating attractive stay content for diversifying customers, etc.
- 5.2 billion yen - improving the environment for accepting foreign tourists visiting Japan
- 9.6 billion yen - Promotion to recover demand from foreign tourists
- 1.6 trillion yen - interest-free unsecured loans
- 3.5 billion JPY – Market intelligence - to provide accurate information timely to international travellers and make tourist destinations more attractive
- Government to send advisers and certified tour guides to accommodation facilities before subsides & train on hosting
- Visa restrictions

GERMANY
- EUR 600 billion - Economic Stabilization Fund - for e.g. state guarantees for liabilities
- EUR 50 billion (no credit) for small companies
- Deferral of tax payments

Source: UNWTO (2020a)

A Policy Framework for Mitigating the Impact of the COVID-19 Crisis



Source: Izvorski et al. (2020)

Africa Measures to Alleviate COVID-19 Impact on Tourism



Although Africa is one the regions least affected by COVID-19, countries have banned international travel to reduce the spread of the disease.

Measures taken across the continent to support survival and recovery of the tourism industry include creation of solidarity funds, support to SMEs and tax subsidies.

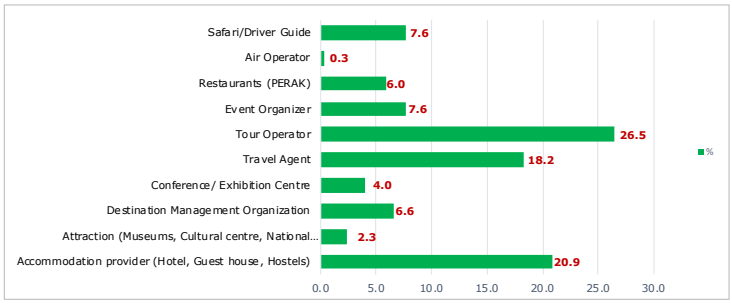
Kenya's Tourism Related Mitigation Measures Against COVID-19 Pandemic

S/No.	Reference	Description of the Measure
1.	12.3.2020	The Ministry of Tourism and Wildlife set aside KSh500 million (USD 4.7 million) to help the tourism sector recover from the COVID-19 outbreak. Part of this money will be used to restore destination confidence to ensure that Kenya remains as a preferred travel destination globally while the rest will be used for the post COVID-19 recovery strategy in all the key source markets.
2.	13.3.2020	Suspension of all non-essential travel to any destination outside Kenya for all government officials, whether on official government business or private business.
3.	13.3.2020	• 30-day ban on all conferences of international nature and those that have more than 15 international participants. • Suspension of all public gatherings, meetings and events for 30 days.
4.	24.3.2020	All passengers coming to the country must undergo mandatory quarantine either at their own hotel, government-approved hotels or in designated government facilities.
5.	24.3.2020	Hotels receiving mandatory quarantine cases were advised by the government to offer modest rates in order to facilitate isolation of people arriving from overseas.
6.	25.3.2020	The government closed the Kenyan airspace to all international passenger flights.
7.	28.2.2020	The president formed the National Emergency Response Committee to monitor the risk posed by COVID-19. The taskforce role is to coordinate Kenya's preparedness, prevention and response to the disease.
8.	25.3.2020	**Monetary Policy** • 100 percent tax relief for persons earning gross monthly income of up to KSh.24, 000. • Reduction of Income Tax Rate (Pay-As-You-Earn) from 30 percent to 25 percent. • Reduction of Resident Income Tax (Corporation Tax) from 30 percent to 25 percent. • Reduction of the turnover tax rate from the current 3 percent to 1 percent for all Micro, Small and Medium Enterprises (MSMEs). • Immediate reduction of the VAT from 16 percent to 14 percent from the National Treasury, effective 1st April, 2020. • Banks to provide relief to borrowers on their personal loans.
9.	6.4.2020	The government imposed a three-week ban on movement in and out of four main coronavirus "infected areas": Nairobi, Mombasa, and Kilifi and Kwale counties.
10.	Feb 2020	Formation of the National Tourism Crisis Steering Committee by the Ministry of Tourism and Wildlife to spearhead crisis resilience and response in tourism in Kenya
11.	March 2020	The National Tourism Crisis Steering Committee commission a study on *The Impact of COVID-19, the measures taken and the recovery pathways.*

A countrywide survey was carried out from mid - March to end of April 2020 to determine 'The Impact of COVID-19, the measures taken and the recovery pathways'. It involved cross-sectional survey using interview schedules and questionnaires; content analysis and economic modeling, through a census of all tourism parastatals and associations across the country.

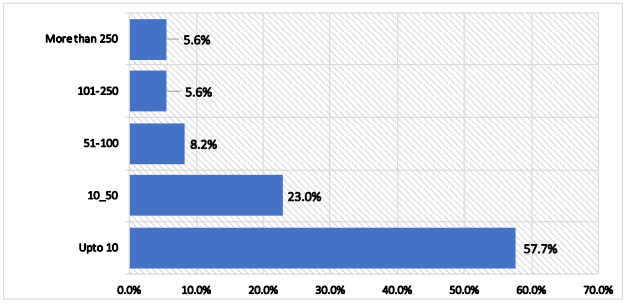
Results of Impact of COVID-19 on Travel and Tourism Industry in Kenya

Business Category



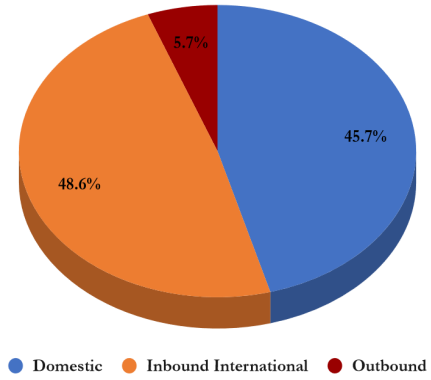
Majority (26.5%) of respondents were under tour operators followed by those working in the accommodation sector such as hotels, guest houses and lodges, accounting for 20.9%. The lowest represented business category in the study was the airline accounting for 0.3%.

Number of Employees Employed by Tourism Organizations



The majority of the respondents employ up to 10 employees, since they consisted of tour operators and travel agents. They mainly target international inbound tourism market.

Target Market



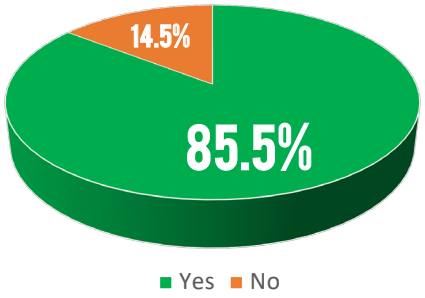
The percentages show that most 48.6% respondents were in businesses serving the inbound international tourism market; 45.7% domestic markets, and 5.7% serving outbound tourism market.

Reduction of Number of Employees Engaged by Tourism Organizations

Category	F	%
Yes	157	81.3
No	22	11.4
Not applicable	14	7.3
Total	193	100

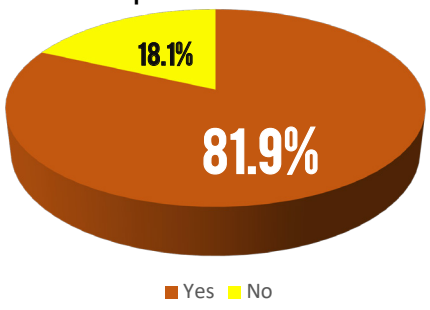
Most (81.3%) respondents indicated that their organizations had reduced the number of employees as a result of COVID-19 outbreak and 11.4% showed otherwise.

Implementation of Pay cuts



Most 85.5% respondents reported that their organization had indeed taken pay cut as a way to survive the loss of revenue as a result of COVID-19 outbreak. Only 14.5% reported otherwise.

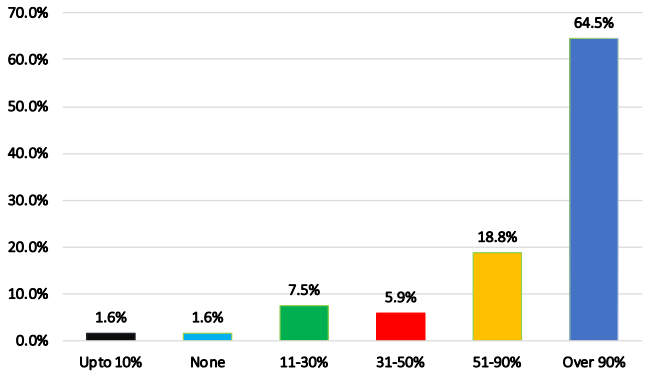
Status of Unpaid Leaves



Most (81.9%) respondents reported their organizations had already sent employees on unpaid leaves with only 18.1% reporting otherwise.

Impact of COVID-19 on Bookings

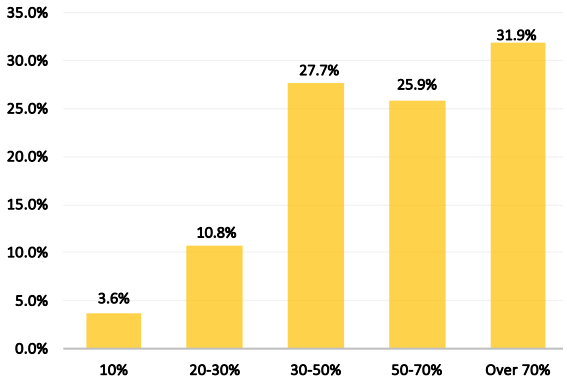
Percentage of Existing Bookings Cancelled



Overall, most (64.5%) of the respondents reported over 90% as the percentage of cancellations of existing bookings experienced by their organizations



Status of Unpaid Leaves



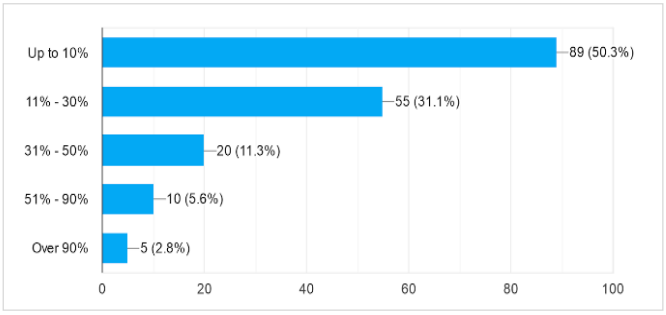
- Quantitative results revealed that about 32% of travel and tourism companies have implemented pay cuts of over 70%.
- Further, in 57% of the organizations, over 70% of the employees have been sent on unpaid leave.
- 74% reported that it is very likely that they will reduce their staff further in the coming months.
- According to the results from interviews, many employees are experiencing unpaid leave, pay cut of 35 – 50 % depending on job group and permanently disengagement.

Tourism Market with Majority of Cancellations

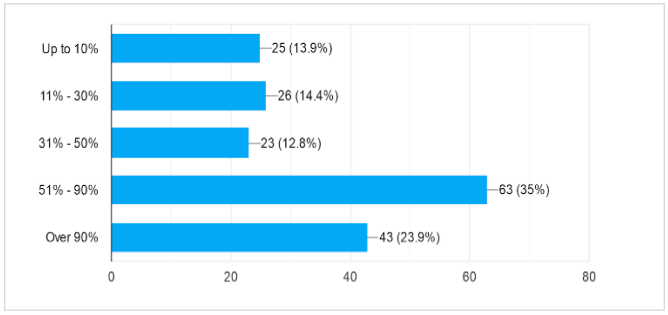
Category	F	%
Domestic visitors	124	64.2%
Regional visitors	74	38.3%
International visitors	157	81.3%
Outbound	29	15.0%
Inbound visitors	2	1.0%
Outbound visitors	1	0.5%

The international tourist market was the hardest hit by the COVID-19 pandemic as reported by most (81.3%) respondents. This was followed by the domestic and regional tourist markets as reported by 64.2% and 38.3% of the respondents respectively. There is need for Kenya to expand the domestic market to cushion the destination in times of crises.

Percentage of the booking changes experienced by tourism businesses from the regional market

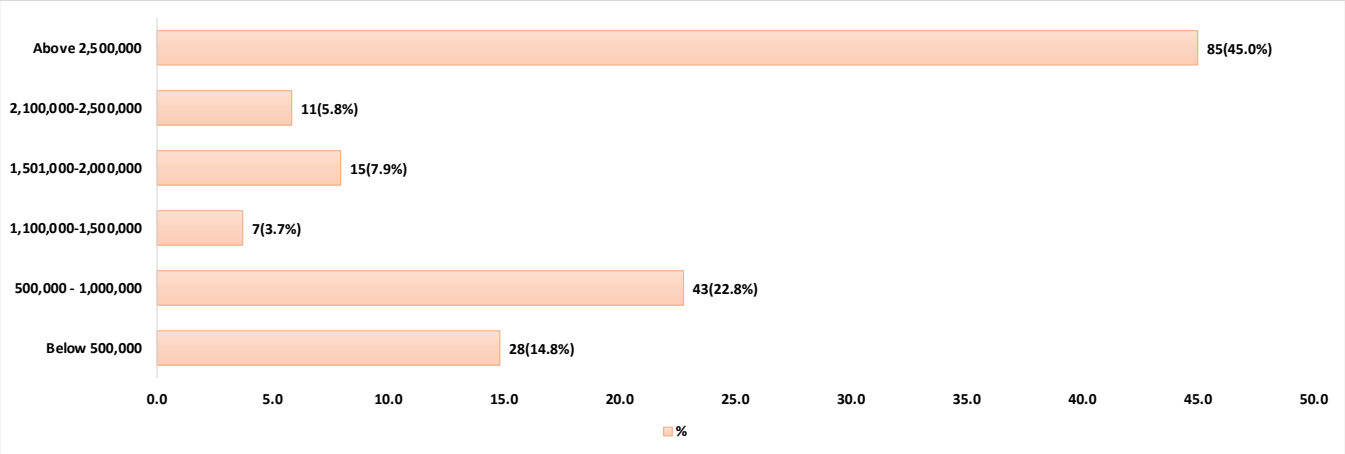


Percentage of the booking changes experienced by tourism businesses from the international market



- The international tourist market was the hardest hit by the COVID-19 pandemic as reported by most 81.3% (157) respondents.
- Most 26.5% (49) repondents reported at most 10% as the percentage of domestic bookings affected by COVID-19 outbreak and 11.4% (21) reported over 90%.
- Most 35% (63) respondents reported 51% - 90% as the percentage changes in bookings from the international market, 23.9% (43) reported over 90%.
- These results show that international market is more affected by any changes than the domestic market. Hence there is need for Kenya to expand the domestic market to cushion the destination in times of crises. 45% of organizations are losing over 2.5 Million as a result of cancellations of booking for the first half of year 2020.

Changes in Revenues As A Result of Cancellation of Bookings
(For a Period from Jan-June 2020)

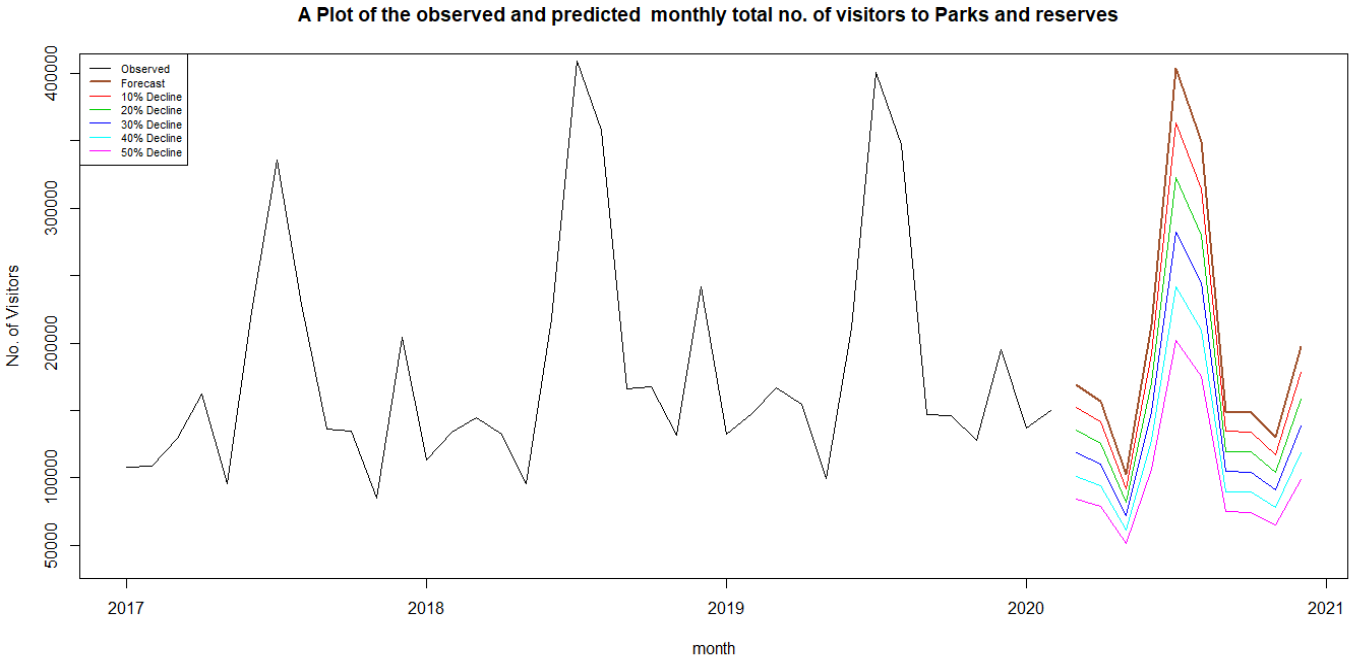


Economic Projections

From the statistical estimates arising from interviews and fieldwork, an average of between 50 and 70% drop in magnitude for several aggregate variables is expected (over a period of 10-12 months). Assuming COVID-19 effects persists for the next 3-5 months ago, the estimated drop-in magnitude would be in the region of 20-50% for most variables. This current report has estimated only the direct /initial/primary effects.

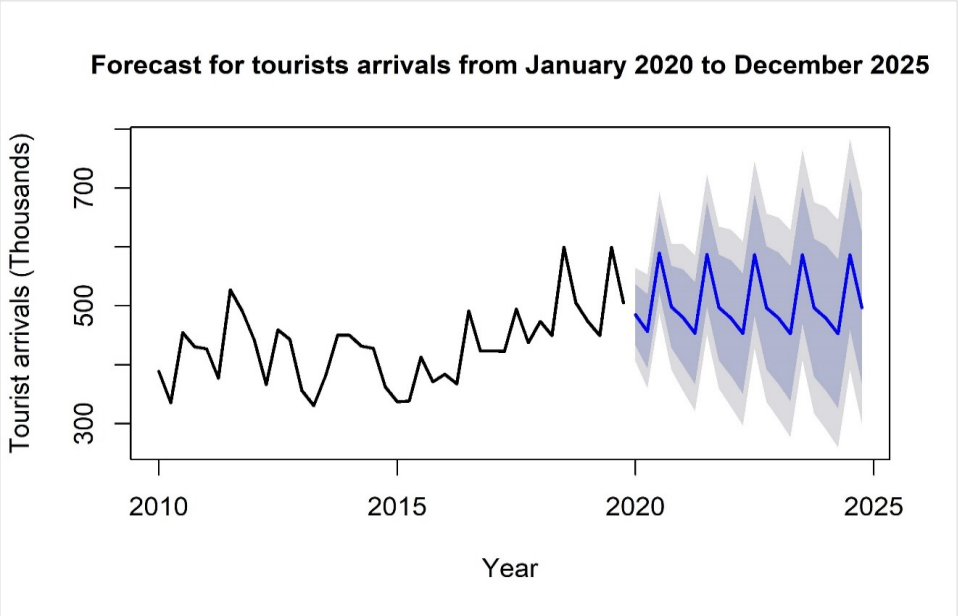
Economic Projections for Parks and Reserves

Cases of decline by 10%, 20%, 30%, 40% and 50% are considered for visitors to parks and reserves. Due to the resilience of Kenya's tourism industry, a post-COVID-19 spike on park visitation is possible both at annual and monthly bases of analysis. If proper recovery pathways are taken, then the industry could return to pre-COVID-19 level by 2021.

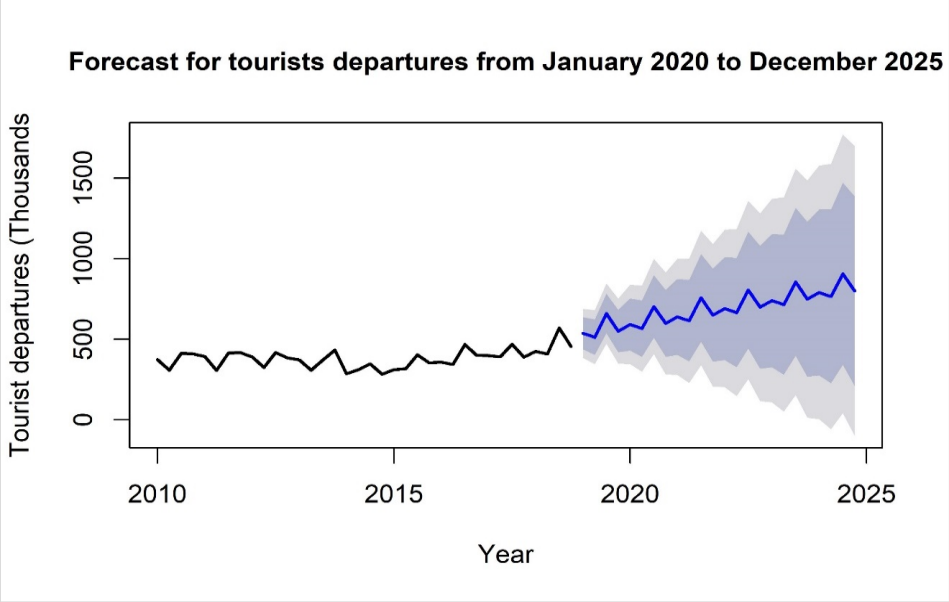


Economic Projections Based on Tourists Arrivals and Departures

The figure below shows an upward trend with a slump during the year 2015/2016. The trend is expected to continue taking an upward movement in the future (2020-2025) based on historical data (assuming no major interruptions). The future effect of COVID-19 on tourist arrivals will be assessed against this trend.



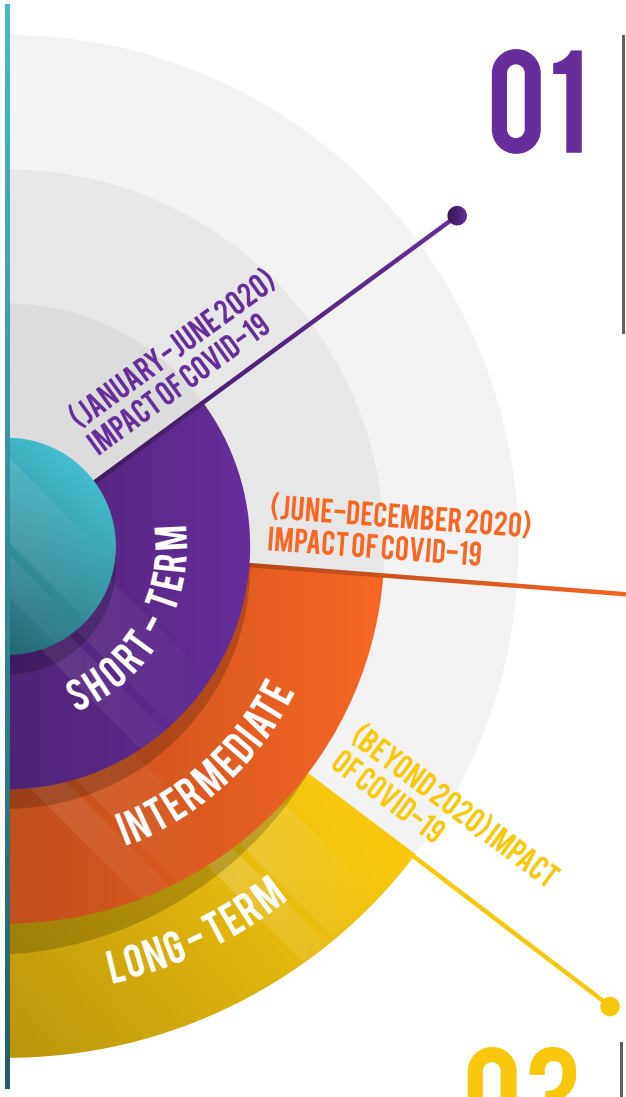
Tourism depature figures below follows a similar trend to that of arrivals except that fluctuations are less erratic. Departures are thus less affected by external and internal factors to the tourism industry of Kenya. Departures from the forecasted trend will reveal the medium and long term impact and effects attributable to COVID-19 and other intervening factors.



Impact of Covid-19 on Tourism at the County Government Level

- Closure of hospitality businesses (hotels, restaurants, and clubs, bars) as a result of travel restrictions and the call by the GoK to stay home and observe social distance.
- Diminished revenues to County Governments as hospitality businesses and tourism service centers (such as recreational facilities) are not in operation. Counties where fishing in activity cannot do the business leading to loss of revenue. The GoK curfew has rendered many tourist activities in all counties to an inertia mode leading to huge decline in revenues collected.
- Agriculture which supports tourism activities has hugely been affected.
- Suspension of state events such as the Madaraka day event. This resulted to loss of hospitality businesses and thus loss of revenues.
- Reduction in local visitation of tourism attraction sites in various counties.
- Reduction in domestic tourism within and outside the counties as a result of travel restrictions and deteriorated sources of revenue.

Timeline of COVID-19 Pandemic Impact on Tourism Businesses



01

The pandemic has brought the following short-term impacts:

- Job losses as employees are declared redundant.
- Reduction of the numbers of employees in form of unpaid leaves.
- Laying-off of temporary workers.
- Implementation of pay cuts.
- Severe loss of revenues.
- Unpaid cost of operating the businesses such as unpaid rent and utilities.
- Cancellation of existing bookings and zero booking of fresh ones.
- Temporary closure of travel, tourism, and hospitality organizations

02

COVID-19 will result in the following intermediate impacts:

- Reduced international tourists' bookings.
- Low business even after recovery.
- Low capital to get back the business to normal operations.
- Eviction from current premises due to unpaid running costs.
- Further loss of revenues.
- Increased job losses.
- Challenges in maintaining overheads.
- Total business closure.
- Increased borrowings to sustain the businesses.

03

COVID-19 is likely to have the following long-term impacts:

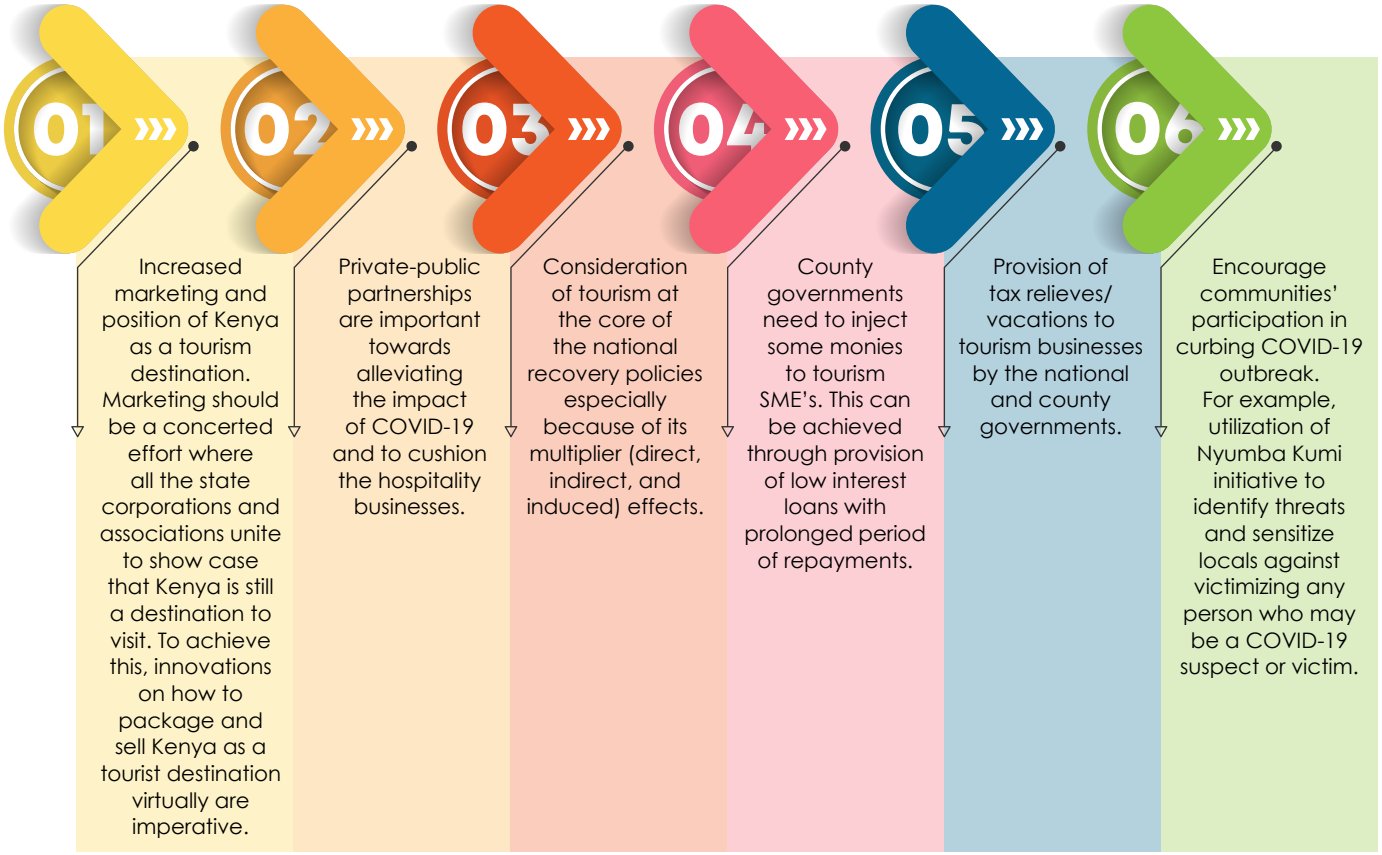
- Business closure.
- Low capital to get back business to normal operations.
- Eviction from current premises due to unpaid running costs.
- Decreased number of bookings.
- Slow resumption of tourism business.
- Global economic recession delaying international tourism arrivals.
- Increased marketing activities and thus increased costs of running the businesses.
- Change in consumer behavior and expectations in social behavior.
- Loss of international licenses on the side of travel agents due to non-payments.



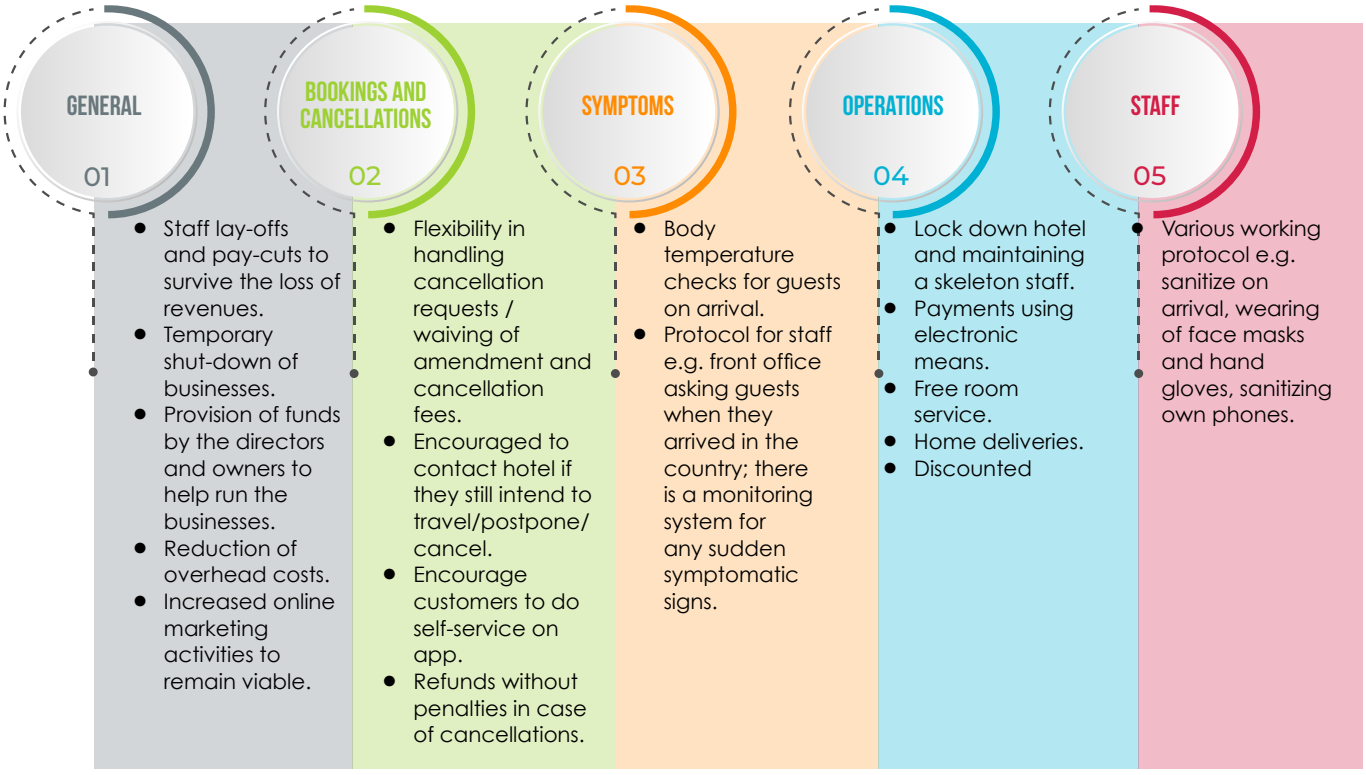
MITIGATION MEASURES

The mitigation measures are to provide strong support for the tourism sector in Kenya to not only recover from the unparalleled impact of the coronavirus pandemic but to do so faster and better.

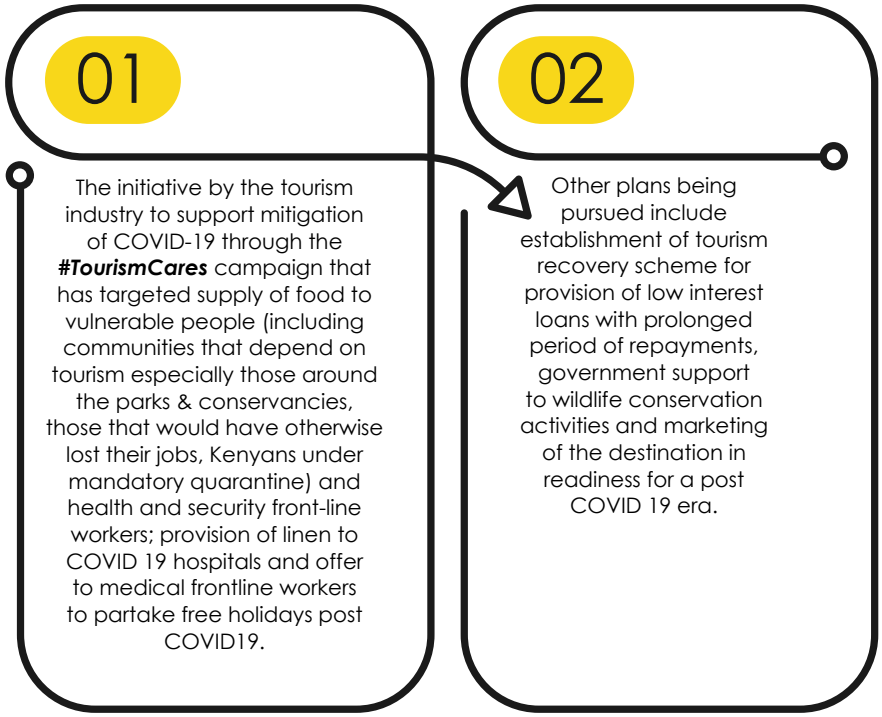
1. Mitigation Measures by the Government of Kenya



2. Mitigation Measures by Tourism Businesses



3. Mitigation Measures by the Ministry of Tourism and Wildlife



RECOVERY PATHWAYS

To recover from the severity of COVID-19, this study emphasizes the importance of:

1. General Recovery Pathways for the Tourism Industry Actors

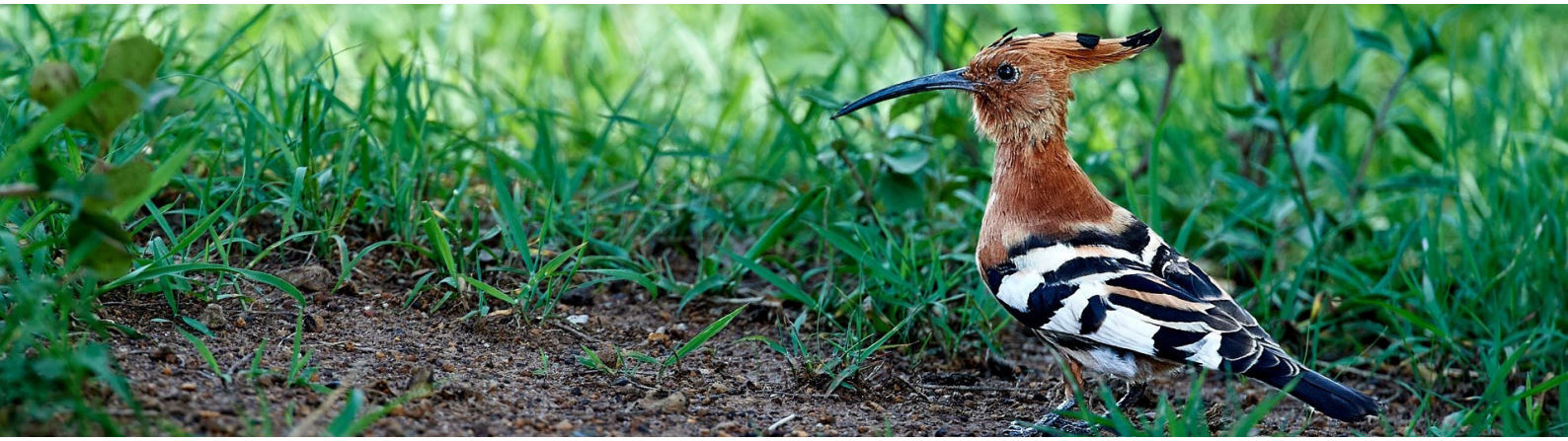
Financial

- Establishment of an emergency funds to help cushion the businesses in case of crisis like COVID-19.
- Provision of grant by the GoK to help address the pending costs and reopen the businesses.
- Tax relieves and incentives by the GoK.
- Tourism Fund to provide SME's with the requisite funding to enable the businesses operate again.
- Provision of favorable tax policies that will encourage both the international and local tourists to travel tomorrow
- Provision of financial stimulus by the government. The GoK has provided Ksh.500 Million for marketing more of it should be directed towards marketing domestic tourism. Moreover, the Government has put the following measures:
  - *(a) Government has set aside Ksh.500 million (USD 4.7 million) to help the tourism sector recover from the COVID-19 outbreak.*
  - *(b) Provision of soft loans to hotels and related establishments through the Tourism Finance Corporation (TFC); Ksh.2 billion will be set aside to support renovation of facilities and the restructuring of business operations.*
  - *(c) Some stimulus funds will be used to support the operations of Utalii College.*
  - *(d) Ksh.1 billion stimulus package will engage 5,500 community scouts under the Kenya Wildlife Service*
  - *(e) Ksh.1 billion will support 160 community conservancies.*
- Provision of stimulus package to help the businesses stay afloat.
- Economic support. The GoK to maintain the adjusted VAT and other taxies policies for a longer period post-COVID-19 pandemic to enable businesses to come back.
- Reconsider the national and counties' budgets by increasing funds directed towards supporting tourism SME's.
- Development of Business Resiliency Fund to provide interest free loans to tourism businesses affected by COVID-19 outbreak.

Marketing measures	○ Lift travel restrictions when the Ministry of Health allows it. ○ Aggressive marketing in potential markets. ○ Supporting the Domestic Tourism Association. COVID-19 has brought international tourism to grinding halt leaving domestic tourism as best alternative for so many counties, Kenya not an exception. ○ Heightened tourism marketing activities to locals. ○ Increase marketing destination representatives and agents in existing and potential tourists' markets for Kenya. ○ Boosting consumer confidence through marketing and provision of incentives in order to hasten recovery.
Product improvement and diversification	○ Development of products that can spread out people and at the same time isolate. Isolation as a result of COVID-19 will go on for a longer time, so products to cater for the isolation should be developed. ○ Product diversification. Kenya has for long being marketed as a destination for wildlife tourism. There is need to strongly support other products such as MICE tourism by developing more state-of-the-art conferences and meetings venues.
Accessibility	○ Develop competitive airline packages that will encourage more Kenyans to move from one county to another for holidaying purposes. The current packages charged by the local carriers (both private and public) is not friendly to many Kenyans thus halting domestic tourism movements. ○ Lifting travel restrictions, the soonest possible as and when allowed by the Ministry of Health.
Pricing revisions	○ Travel, tourism and hospitality businesses need to adjust their current rates not for the sake of profits, but for the sake of encouraging movements. With movements, employment in the sector will be back.
Research, Crisis Preparedness, and Partnerships	○ Support and encourage participation of all tourism stakeholders in the currently set Global Tourism Resilience and Crisis Management Centre (GTRCMC) to put in place measures that will address other pandemics tomorrow. ○ Stakeholders' involvement. Counties need to engage tourism consultants to give advice and innovation ideas, for example, in product improvement and diversification. ○ County governments' partnerships to develop affordable tourism packages that cuts across. This will encourage domestic/inter-county tourism.

2. Recovery Pathways for Hotels and Tour Companies

Bookings	• Special discounted rates for bookings done in March/April. • Flexible booking policy. • Waiving cancellation/amendment fees depending on seasonality. • All booking/amendments made under flexible booking conditions must be utilized in the next 12 months. • Discounts if re-booked at certain off-peak dates.
Members benefits	• Members can maintain their status without fulfilling necessary qualifications/criteria. • Reduce membership criteria required. • Extension of membership plans and benefits / suspending points expiration dates. • Normal cancellation applies after 30th April, 2020. • Convert booking into points in lieu of travel.
Improve customer relations	• Offering discounts on bookings made during this time. • Having flexible booking policies including waiving cancellation and amendment fees. • Extending members' status without requiring them to fulfil necessary criterion. • Extending membership plans and benefits past their annual expiration dates.



3. Recovery Pathways for the Ministry of Tourism and Wildlife

i. Translate the fiscal, monetary and social measures into action through targeted action plans for the benefit of the tourism industry and track their impact on individuals and tourism businesses.
ii. Transform the tourism public sector through institutional reforms and re-engineering of tourism related government departments and agencies.
iii. Creation of a destination marketing system from the digitalization strategy to inform the product improvement and diversification process that speaks to domestic and regional markets in the short and medium terms and international market in the longer term.
iv. Undertake such researches periodically to continually inform government and its tourism stakeholders as the situation evolves.

4. Case Study Recovery Pathways

a) Kenya Tourist Board (KTB)

Despite a poor season from January till April 2020, Kenya's tourism industry is set to hopefully bounce back from June 2020 after the COVID-19 pandemic. Recovery strategies could include:

KTB Recovery Strategy April 2020 and Beyond	
KTB Plans -Immediate	KTB Plans – Post COVID-19 Plans
• Maintain continuous online destination visibility aligned to *Stay Home, Travel Tomorrow* messaging. (UNWTO Campaign message to support WHO messaging noting that tourism and travel has actively promoted spread of the virus). • Continuous tourism landscape assessment, collating stakeholder feedback, stakeholder engagements to give input to Tourism Recovery Strategy • PR strategy during the Crisis period in media platforms and digital platforms. • Identify themes that will remind people what is Magical about Kenya and inspire them to schedule their post Corona travel. • Rally industry to share content, stories, images, videos, testimonial alongside these themes. • Trade Webinars for the different markets. • Roll out e-learning Program in July 2020. • Patriotic message to Kenyans here and abroad that we are standing with them as our no. one market and also because they are the ones that create & deliver the magic (Target: Kenyans in general, the trade, non-tourism partners). • Develop a Tourism recovery strategy for the following: – Domestic market – Regional markets – Overseas Markets This will kick off in about 4 months.	• Aggressive demand creation in the domestic and international source markets. • Roll out of the Tourism Recovery plans across markets – The Big Idea. • Megafams for trade & Media. • TOPs – Co-op Marketing. • Influencer marketing for niche products/ experiences e.g. the tea/Flowers/Coffee/Athletes ambassador program/ campaign. • Synchronized Kenya themed Events in key source markets.
• Stakeholder mapping based on market re-prioritization (To determine whom to work with).	• Implement a sustained Marketing Incentive campaign with partners that would deliver the most impact in the source markets.

b) Kenya Association of Travel Agencies (KATA)

Strategy	Description	Needed Intervention	Expected Outcome
New business model	A New Business Model needs to be designed for the travel agents, and it must demonstrate its financial strength capacity, and the balance sheet health under an environment of doing business with the novel Coronavirus.	The MoTW to facilitate a linkage with business economists to study the current business model, and to recommend changes on the key drivers that would contribute to a more sustainable business unit.	Right alignment and allocation of business resources on the business drivers. Ability to measure results based on pre-determined KPIs.
Financial solutions	To address the business concern on working capital, there is need to have a Discounting Financial and Supply Chain Financing as an immediate solution for enabling trade-based on the principle that they shall be opening shop in a negative position.	The MoTW to facilitate funds from the national government, and to identify a partner financial institution that can disburse these through an interest-free/concessional rate loan scheme guaranteed by the government fund.	Travel products will become readily accessible to corporate and Government business partners, backed by the funding. This will create an immediate stimulation of consumption of travel products and fast track the recovery of the travel industry with an immediate impact of jobs being saved, and SME businesses in the sector recovering.
Jobs Creation through e-commerce Based Business Model	Undoubtedly, job losses in the Tours and Travel industry will contribute to an increase in poverty levels and a decline in the economy's GDP. However, the novel coronavirus has caused the leapfrogging of our economy into an active e-commerce economy that is heavily supported by mobile money financial services.	The MoTW to fund start-up businesses in the travel sector, with a payback principle upon achieving the break-even on the initial investment costs. Through government support and in partnership with banks and other financial institutions, develop a corporate credit card linked to the Tours and Travel transactions with a capped working capital amount to empower the start-up fund the initial	Low risk business model providing a technology aligned business model for the Youth and Women in the travel industry. Growth of employment levels within the industry driven by the Online Travel Agencies, thus contributing to poverty reduction and growth in Kenya's GDP driven by these SME businesses.

Re-skilling and Up-skilling	The New Normal has disrupted the art and science of doing business. To promote sustainable travel, training in understanding consumer behavior, behavioral economics, data analytics and a research-based business approach will be important.	The MoTW to provide a capacity building fund through Kenyatta University or other registered Universities to promote the re-skilling and up-skilling in the travel industry.	Mind shift in the approach to business and opportunities in the travel industry, with an aim to achieve efficiencies and rapid recovery of the travel industry.
E-commerce marketing	Building of consumer confidence is key owing to the underlying fear factor amongst travelers. Various aspects of experiential marketing, and placement, brand messaging will be key in retelling a new story for travel and destinations.	The MoTW to provide a fund through KTB to provide marketing support through Search Engine Optimization (SEO) and Data Analytics Tools that will strengthen the travel brands placement locally and internationally, and open opportunities to new market places for the sector.	Growth in re-building travel confidence, while building awareness on the new travel protocols amongst travelers. Additionally, this marketing should build long-term tourist demand for Kenyan travel and tourism products showcased.



c) Tourism Regulatory Authority (TRA)

a) Solve the Humanitarian Crisis	• The line of action would be to solve the humanitarian crisis. As such, in our response to this pandemic, we wish to echo the sentiments of the United Nations World Tourism Organization (UNWTO) of putting people and their wellbeing first. As a Regulator, we are highly concerned with the survival of the tourism businesses and the livelihoods of their employees. This calls for us to explore and put in place interventions that will enable MSMEs sustain their operations though in scaled down manner to enable them survive these turbulent times. As such, it is imperative that these businesses are supported to ensure that they are able to retain employees on the payroll for the next three to four months. This intervention will generate a positive ripple effect up and down the tourism value chain considering the great multiplier effect of tourism. Keeping tourism businesses solvent is key to saving jobs and limiting the adverse effects of these pandemic in the medium term.
b) Enhance Standards in the sector	• Going forward in the post covid-19 pandemic period, enhancing standards for tourism enterprises and food safety and hygiene will be the new normal. This will enable destination Kenya to build an image of a safe and hygienic destination in the international market place. As such, it is projected that this pandemic will play a critical role in destination choice thus shape travel patterns not only in the medium term but also in the long term. Therefore destinations embracing standards in their tourism and hospitality establishments, product offerings, real-time interactions and food safety and hygiene standards will have a competitive advantage. The Regulator will therefore give prominence to the development of enterprise standards for facilities and activities as listed in the 9th schedule, food safety and hygiene standards as well as standards governing real-time interactions between the customer and the service provider during the service encounter. • Regular quality assurance audits will be key to ensure that tourism and hospitality enterprises comply with the set minimum standards. • Tourism and hospitality enterprises will also be encouraged to go beyond the set minimum standards for them to be recognized by the Authority through an award of a "Mark of Quality" for excellence (an equivalent of the "super brand" in the manufacturing sector). This will bring additional benefits for the enterprises in that, their links in Authority's website will be interactive. This implies that a client looking for the list of registered enterprises will be able to log into the Authority's website and by clicking the respective enterprise's' link, they will be directed to the respective enterprises' website. This will link will therefore act as a powerful recognition and marketing platform. • Further the mark of quality denoting excellence will be used in all the promotional materials of the respective enterprises and internal communications thus consistently drive the desire of directors and employees in these enterprises to continually adhere and improve on their standards of their services and product offerings.

5. Elaboration on Key Recovery Strategies

Key recovery strategies emanating from various stakeholders include:
A. Domestic tourism growth.
B. Regional tourism growth.
C. Product Improvement and Diversification Strategy and Digitization of tourism.

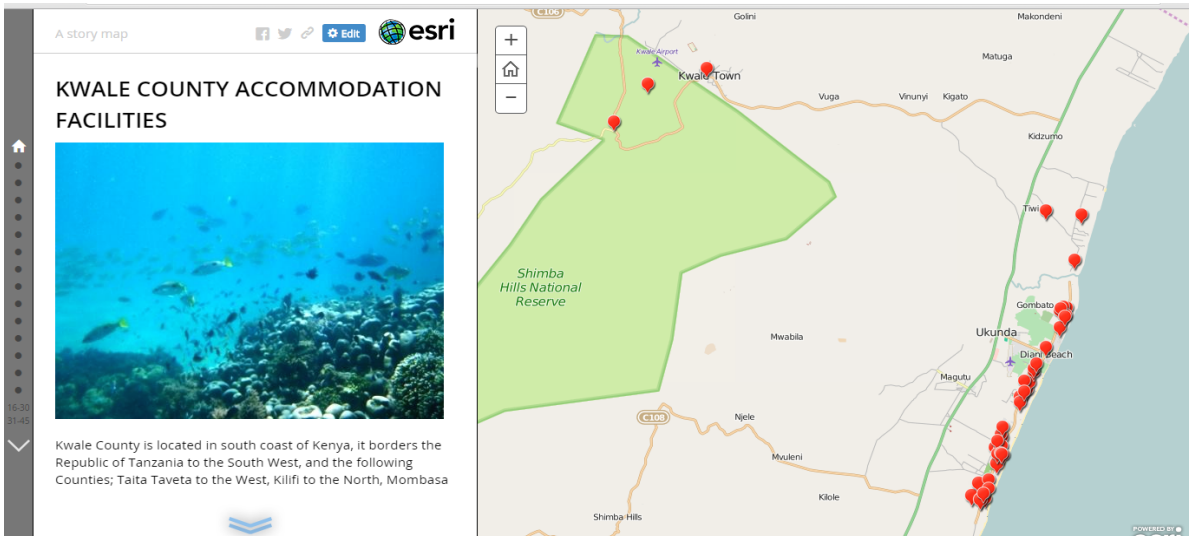
A. Domestic tourism growth
- Target Growing Middle Class - 1,020,681 (36.9%) of employed workforce.
- Propose one week national-wide holiday for all working population during August and December school holidays (prolonged festivals holidays).
- Repackage tourism product with local market interests.
- Make domestic travel more attractive through campaigns.
- Provision of accessible information and ease of purchase.
- Holidays as non-wage benefits.
- Organized road transport to events and attractions.
- Development of circuits with specific itineraries.
- Research on domestic market preferences.

B. Promotion of Regional Tourism
- A total of 825,489 regional tourists from Africa and Indian Ocean visited Kenya in 2018 accounting for 40.76% of the total international tourists, which shows a huge potential for growth.

C. Product Improvement and Diversification Strategy
- To enhance recovery after COVID-19, Kenya needs to improve, develop, diversify, re-package and promote other tourism products in addition to the Africa safari and beach destinations. Tourism Product improvement and diversification may consider various aspects like strengthening Meetings, Incentives, Conferences and Exhibitions (MICE) tourism, birding, cultural tourism, agro-tourism, adventure tourism, Sports tourism products and many others, in relation to the market demand and the resource base of Kenya.
- Key strategies are
  i. Geospatial presentation of Tourism resources in Kenya.
  ii. Capturing Experiences and information.
  iii. Interpretation of the tourism product.
  iv. Packaging Tourism Products.
  v. Pricing revision for Tourism Products in Kenya.
  vi. Digitizing travel and tourism.
  vii. Promote Community - based tourism.
  viii. Fight against the Spread of Disinformation.

EXPLANATION OF KEY STRATEGIES

1. Geospatial Presentation of Tourism Resources in Kenya



In line with making Kenya more resilient to crises, one of the areas that the country can hugely improve on is in the mapping of tourism resources in the country. The Ministry could determine the spatial quantity, capacity, quality, status and distribution of tourism attractions, amenities, activities, accessibilities and ancillary services around the country that will be accessible across the world. The ultimate goal is to create an Integrated Tourism Management System with updated content from all the stakeholders. This will ultimately increase the country's market share and assist with product diversification. The content will also improve the countryɔs competitiveness index, which currently stands at position 82.

(ii) Capturing Experiences and information

Kenya as a destination needs to package information on tourism products through the process of knowledge capturing. **Knowledge Capturing** is the process of converting the knowledge that resides in people's heads, and elsewhere, into tangible, explicit knowledge assets. This will involve recording experiences from all forms of tourism in Kenya in a format that can be stored, further processed, adapted, and shared within and outside the destination.

The **packaged information** from knowledge capturing and other sources will then be shared in form of media such as text, audio, videos, images, graphics, etc. Different media could be used that includes website, social media, emails, narratives at the attractions etc. This information will add value in product packaging and marketing, and prolong the product life cycle in line with the recommendations given in the National Tourism Blue Print 2030, developed by the Ministry of Tourism and Wildlife in 2017.

2. Interpretation of the Tourism product

Interpretation is an educational activity which aims to reveal meanings and relationships through the use of original objects by firsthand experience and by illustrative media, rather than simply to communicate factual information. This will increase the visitor's understanding, awareness and appreciation of nature, of the tourism product hence providing an enjoyable and meaningful experience.

3. Packaging Tourism Products

Enhance existing adventure activities and expand the types of activities offered at key nodes, e.g. through activity centers, to include:

a. Mountain/rock climbing
b. Hiking
c. Mountain biking
d. Slack packing
e. River rafting
f. Zip lining/bridge swings/bungee jumping
g. Scuba diving
h. Entomology

Packaging the product

- Development of a comprehensive tourism products and services database
- Development of Packages or itineraries which will provide a one stop shop, at one, fairer all-inclusive price.
- Create new experiences through packaging, to gives a competitive advantage through marketing or advertising

The following are a range of products and services that can be linked in a package:

- **Food and beverage**
- **Accommodation**
- **Built attraction** – museum, art gallery, theme park etc.
- **Natural attraction** – waterfalls, scenic vistas etc.
- **Transportation**
- **Programming** – gourmet cooking, tea/coffee tasting, wood carving etc.
- **Guided tour**
- **Entertainment** – theatre performance, stage show, concert
- **Event/festival**
- **Shopping**
- **Activity** – hiking, kayaking, alpine skiing, snowmobiling
- **Local culture**

There is need to enhance and package the following new and improved products:

- **Beach tourism**
- **Wildlife Tourism**
- **Business and Conference Tourism**
- **Cultural and Heritage tourism**
- **Homestays, Airbnb and general sharing economy concept**
- **Health and wellness tourism e.g. hot springs, natural forests and products linked to traditional healing, use of natural medicines etc.**
- **Medical Tourism**
- **Ecotourism**
- **Sports tourism**
- **Shopping tourism**
- **Avitourism (Birding)**
- **Photography**
- **Voluntourism (Communities and wildlife/nature conservation)**
- **Flora related tourism**

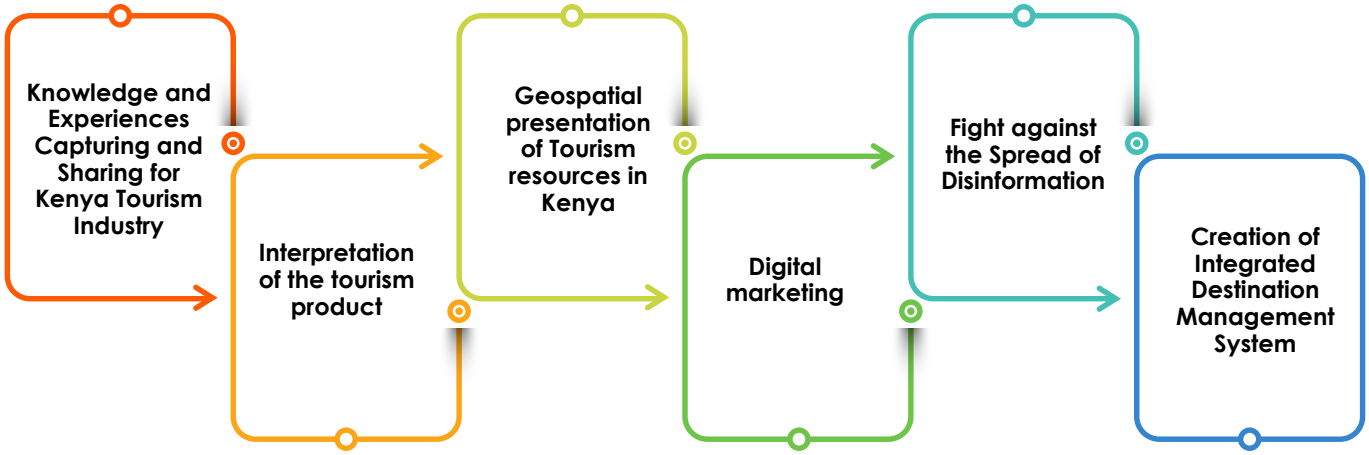
4. Pricing Revision for Tourism Products in Kenya

A major challenge facing the tourism industry in Kenya is the relatively high price of the tourism products. There is need for a study to determine the best prices for hotels, parks, attractions etc. through economic models, in order to remain competitive.

Prices for commodities with markets (such as hotel rooms, food and drinks, transport and communication) can easily be derived through traditional business pricing methods. The current pricing methodologies in the country borrow heavily from the Willingness to Pay/Accept concept. Willingness to pay (WTP) is the maximum amount a person would be willing to offer for a good/service. Willingness to accept compensation (WTA) is the minimum monetary amount required for an individual to forgo some good, or to bear some harm. The optimal price of any non-market commodity is any point between a buyer's willingness to pay (tourists) and a seller's willingness to accept compensation (tourism organizations). Non-market commodities in tourism include especially environment-based resources such as parks and reserves, recreational spaces, and museums.

A review of such studies based on WTA and WTP will be helpful to Kenya as a destination, since tourism resources such as parks, reserves, and museums are largely non-market based. However, the pricing of human-made facilities/resources such as accommodation and transport can be analyzed using the usual traditional market-based approaches. The three most applied methods for measuring WTP are **(i) Contingent valuation (ii) experimental auction and (iii)** conjoint analysis.

5. Digitizing travel and tourism



6. Promote Community-based Tourism

Development of unutilized rural homes for tourism through the adaption of models such as Albergo Diffuso.

7. Fight against the Spread of Disinformation

Key organizations and structures-including, travel and tourism industry stakeholders, community and faith-based organizations, village leaders, and local governments-need to be involved in the effort from an early date to support the response and to help tweak it for maximum effectiveness in each local context. There should be mainstream and social media effort to counter negative information. This could be spearheaded by the Kenya Tourism Board.



MONITORING AND EVALUATION OF THE IMPLEMENTATION OF COVID–19 PROTOCOLS IN TRAVEL AND TOURISM IN KENYA

A. Purpose of the Protocols

To provide the industry with the insights and toolkits which while implemented ensure that the destination is safe, secure, seamless and provides an authentic and meaningful experience.

B. Monitoring and Evaluation of the Implementation of COVID-19 Protocols

This could be done through the use of tracing and warning apps, geospatial digital solutions and evaluation of periodic reports.

- Use of tracing and warning Apps: The Apps should be voluntary, transparent, temporary, cybersecure, using data, relying on Bluetooth technology to provide alerts incase of infections close by. Health authorities should be the only ones to have access to such data and take measures to interrupt transmission chains. These apps should:
  - Provide accurate information on the pandemic
  - Provide a questionnaires for self-assessment
  - Contact tracing and warning functionality
  - Communication capability
  - The Apps could have self-diagnoses and symptom checker applications.
- The industry to embrace innovative geospatial digital solutions to self regulate in different sectors and consolidate all information centrally. Apps could be used to fill periodical questionnaires by travel and tourism operators and for monitoring and evaluation by the government.
- The industry to monitor and evaluate periodic reports throughout the crisis and recommend action or the phasing out of measures that seem no longer necessary.

C. Protocols for Key Industry Sectors

1. Private Sector Cross-cutting Measures

- Obtain reopening license
- Develop a COVID-19 infection prevention plan
- Establish a preparedness plan
- Prepare a response plan
- Develop a staff code of conduct
- Set up coordination committee
- Train the personnel
- Share guest guidelines ahead of trip
- Communicate protocols to staff and guests
- Integrated technologies to enable automation to ensure digital touchless operations
- Use signposting - Safety signs or markings (space, hygiene etc)
- Provide elevator etiquette
- Install visual social distancing markers
- Ensure physical distancing, avoid queuing or mark floors
- Online or self check-in and check-out
- Use thermal scanning process
- Limit the number of guests
- Personal protection equipment (PPE) available to staff eg use of face masks
- Guidance for cleaning crew to all areas of the venue including washrooms, elevators, escalators, conference areas, lobbies, and common areas
- Use selected approved disinfecting products
- Evaluated innovations for cleanliness and disinfection
- Availability of alcohol-based hand rub sanitizer
- Avoid activities in closed spaces
- Sufficient ventilation
- Stay-home policy for anyone displaying any symptoms
- Harmonized health, safety and hygiene protocols.
- Entry-exit screening that is non-intrusive
- Closely monitor the number of guests within the establishment
- Regular monitoring of compliance
- Increased frequency of waste disposal
- Inform guests about support available if questions or concerns arise
- Aligned new protocols with all third-party partners and suppliers
- Digitizing guest services such as digital maps, digital queue management, e-menus, virtual personal shopping, roving concierge and promote contactless payment
- Implement new technologies such as augmented reality or virtual reality to improve visitors' experience before, during and after a visit
- Doors should be opened automatically or remotely
- Statistical information and continuous research

2. Hospitality Industry

A. Operational Protocols

- Evaluated innovations
- Right staffing levels
- Health checks for staff and guests
- Physical distance maintenance
- Guest information & guidelines
- Staff training on:
  i. Infection control
  ii. Social distancing
  iii. Enhanced hygiene measures
  iv. Handwashing, the use of masks and gloves
- Hygiene operations on:
  i. Increased frequency of cleaning
  ii. Innovations eg electrostatic sprays, ultraviolet light
  iii. Contactless check-in
  iv. Personalized service
  v. Health check measures
  vi. Spare isolation rooms
  vii. Physical distancing

B. Safe Experience

- Guest health/temperature checks
- Limited social interaction
- Food safety and hygiene
- Avoiding guest handling of food at buffets
- Offering room service
- Disinfecting, table spacing and social distancing
- Clear, consistent, and enhanced communication

3. Tour Operators and Travel Agents

- Provided staff with the tools and information necessary regarding infection control, physical contact, sharing of food and utensils, appropriate attire, and enhanced hygiene measures, the use of masks and gloves
- Create personalized and small group tours and packages.
- Incentivize domestic tourism, short trips and visits to nearby destinations in the short term.
- Share guest guidelines ahead of trip
- Guest health checks and testing
- Explore collaboration with medical/travel insurance companies
- Allow for voucher redeeming for packages and products
- Promote digital communication
- Promote rent-a-car services
- Allocated seating plans with no rotation
- Provide bins with liner bags and regular disposal
- Sanitation, disinfection and deep cleaning practices across transportation
- Guest health checks and testing
- Support use of contact tracing apps
- Allow for voucher redeeming for packages and products
- Established with partners and suppliers, including shops, showrooms, museums, shows, theatre, parks, reserves, concert halls, factories & farms, that they follow likeminded health, sanitation, disinfection and hygiene protocols

4. Aviation

- Develop a COVID-19 infection control action plan/checklist
- Flexibility in slot allocation practices to match demand
- Ensure certifications and airworthiness
- Confirm partner airports, transport and catering companies are compliant
- Health checks for airline staff
- Occupancy limits in boarding areas and congregation on planes
- Technological innovations
- Reduce passengers' touchpoints
- Increase the frequency of aircraft and cabin cleaning
- Guidelines for food safety on-board
- Pre-arrival risk assessment questionnaire / self-declaration electronic portals
- Non-intrusive entry-exit screening
- Robust COVID-19 testing within a short timeframe
- Assist government with contact tracing
- Provide signage, floor markings and announcements to encourage physical distancing
- Encourage online check in and self-bag drop options
- Speedy baggage claim process
- Ensure health and safety of passengers on-board the plane
- Provide masks for passengers and crew and ensure their use during the whole flight
- Limit movement in the cabin
- Rearrange seats to reduce contact
- Avoid having guests handle food
- Clear, consistent, and enhanced communication both digitally and physically at airports and in the plane
- Limit hand luggage
- Traveler insurance covering COVID-19

5. Airports

- Mitigate risks at departure and/or arrival
- Schedules in place for when operations resume
- Ensure required staffing levels
- Implementation of biometrics and reduce passengers' touchpoints the use of selfcheck in kiosks and bag drop, home-printed bag tags, off-airport processing, greater use of biometric e-gates and boarding card reading gates
- Implement guidelines for food safety in restaurants, cafes and kiosks relating to supply chain control, food handling and preparation, hygiene, sanitation, disinfection, digitization and queue management in line with local legislation
- Monitored the number of passengers in a given space (gates, shops, lounges, etc)

- Evaluated innovations for cleanliness, disinfection and a touchless experience, such as e-shopping, with validation
- Protective screens for staff and use of personal protection equipment (PPE)
- Code of Conduct or list of expected behaviour for staff and operations
- Revisited guidance for cleaning team to all areas of the airport including self-service equipment, baggage trolleys, counters, buggies, security checkpoints, washrooms, elevators, hand-rails, boarding areas, and common areas with a specific focus on high-frequency touch points.
- Feed into contact tracing apps.

6. MICE

- Confirm that key stakeholders are compliant
- Ensure physical distance in layout and limit the number of staff
- Support working from home to reduce density in the workplace
- Design and share visual of floor plans and layout to showcase preparedness
- Share participant guidelines ahead of event
- Health checks for staff
- Use of technologies to enable automation such as contactless registration and contactless payments

- Use digital invitations
- Sufficient ventilation such as air-conditioning and air exchange
- Provided staff with the tools and information necessary
- Selected disinfecting products by venue
- Consider hybrid events in the future using virtual platforms for some

7. Outdoors Activities

- Use recalibrated offices and working spaces to promote social distancing
- Ventilate offices through open windows
- Observe Government mandatory trading hours, delivery hours, packaging disposal, merchandise

to shop floor procedures and product care, social distancing requirements, fitting room occupancy, deep cleaning and sanitization and, the transition to digital receipts.

8. Attractions and Conservation Centers

- Protect employees with various approaches, including barriers, protective coverings, and distancing
- Reduce touch areas
- Monitor entrance

- Manage density of people within the facilities
- Communicate protocols and responsibilities to the guests
- Place signs or markings appropriately
- Use of innovative technology

9. Government

- Develop a COVID-19 infection control action plan/checklist
- Flexibility in slot allocation practices to match demand
- Ensure certifications and airworthiness
- Confirm partner airports, transport and catering companies are compliant
- Health checks for airline staff
- Occupancy limits in boarding areas and congregation on planes

- Technological innovations
- Reduce passengers' touchpoints
- Increase the frequency of aircraft and cabin cleaning
- Guidelines for food safety on-board
- Pre-arrival risk assessment questionnaire / self-declaration electronic portals
- Non-intrusive entry-exit screening
- Robust COVID-19 testing within a short timeframe



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