



Masai Mara Tourism Recovery Project 2021

**Enhancing Tourism Recovery Post-COVID-19:
Lessons from Masai Mara Game Reserve, Kenya**

Authors:

Dr. David O. Chiawo, Collins O. Haggai, Veronica Muniu, Rose Njuguna



Strathmore University
School of Tourism and
Hospitality





Enhancing Tourism Recovery Post-COVID-19: Lessons from Masai Mara Game Reserve, Kenya

Authors:

Dr. David O. Chiawo
Collins O. Haggai
Veronica Muniu
Rose Njuguna

Table of Contents



Introduction1



Methodology4

2.1. Tourism context of kenya and masai mara5

2.2. Data collection and analysis5



Findings9

3.1. Impact of covid-19 on conservation10

3.2. Impact of covid-19 on communities10

3.3. Impact of covid-19 on tourism businesses11

3.4. Lessons learned12

3.5. Critical factors for recovery15



Discussion17

4.1. Sustainable approaches to recovery18

4.2. Policy initiatives to support recovery21

References22

Appendix 1: policy brief24

ACKNOWLEDGEMENTS

Strathmore University, School of Tourism and Hospitality availed and supported the research team. The County Government of Narok funded the project. Mara Serena Safari Lodge hosted the research team, the stallholder meeting, and Focus Group Discussions. Kichwa Tembo, Olonana cultural BOMA, and Olonana camps participated in the field survey and interviews. Royal Media Services (RMS) for the media crew and field photography. NUFRICA captured field photographs. Seven Link Leasing Limited provided transport to the research team. Stakeholders who participated in Focus Group Discussions included Pardamat Conservancy, Mara North Conservancy, KAPS, Mara Triangle, Mara Savova Camp, Keekorok Lodge, Oloisukut Conservancy and the members of the community.

EXECUTIVE SUMMARY

The COVID-19 pandemic brought the tourism world to a standstill, with a large-scale impact on economies, societies, livelihoods and growing risks of a global recession associated with massive loss of direct jobs in the tourism industry. The project aimed to explore the impacts of COVID-19 on conservation, communities and businesses, lessons learned, and policy direction to support critical strategies for sustainable tourism recovery in Masai Mara. The objectives explored included;

- 1. awareness of critical factors for tourism recovery and sustainability during and in the post-pandemic period,**
- 2. the socio-economic vulnerabilities of indigenous communities to COVID-19,**
- 3. lessons learned to enhance adaptation and resilience, and**
- 4. the impact of COVID-19 to conservation management of the destination.**

Mixed methods including field observations, key informant interviews and focus group discussion

were used to collect data on impacts, lessons learned, recovery measures and emerging issues for policy concern. The target groups for the interviews and FGD were tourism industry business players and policymakers in the Masai Mara conservation area including lodge managers, rangers, tour and travel agents, conservancy managers, county government officials and the local community. The findings indicate a negative large-scale effect on conservation, tourism business and communities in Masai Mara national reserve. It is established that integrated policy interventions by both county and national governments like fiscal policy targeting Small, Medium and Micro Enterprises and health policy to accelerate vaccination rate could largely promote tourism recovery. Effective linkage of tourism revenue to conservation and local livelihood needs could largely enhance the resilience of the destination. The potential of domestic and regional tourism markets to sustain tourism has been identified and a clear plan by the tourism industry players to tap into this market has been recommended. The persistence of the economic damage to the tourism sector will depend on how both county and national governments handle policy interventions to incentivize tourism recovery. The policy interventions must target motivating tourism growth at a rate that is faster than the 2019 growth trend, to fasten the “catch-up” period and achieve full recovery in the short term.

Keywords:

COVID-19 Pandemic, Tourism recovery, Masai Mara Game Reserve, policy interventions, Kenya

01

INTRODUCTION



The COVID-19 pandemic has brought the tourism world to a standstill with severe impacts on communities, tourism businesses, and conservation (Breisinger, Raouf, Wiebelt, Kamaly & Karara, 2020). The full collapse of international tourism has led to the loss of direct jobs and the growing risks of a global recession associated with massive loss of direct jobs in the tourism industry (Breisinger et al., 2020; Wyplosz, 2020) bally (UNWTO, 2020). COVID-19 has caused combined demand and supply shock to the tourism industry producing large-scale, global, and possibly persistent economic disruption (Dinarto et al., 2020; Wyplosz, 2020). It is already clear that its economic impact would be more severe and devastating than in the case of the Severe Acute Respiratory Syndrome (SARS) in 2002-2003 (Fernandes, 2020; Riley et al., 2020). Overall, the potential impacts of this crisis are larger than any previously seen in history (Fernandes, 2020). Infectious diseases have a great impact on tourism, and hotel room occupancies, owing to the industry's reliance on human mobility Yang, Zhang & Chen (2020) e.g. during the outbreak of Ebola a shock of US\$ 53 billion loss was experienced in West Africa and a 20% drop in Sierra Leone's GDP in 2015 (Fernandes, 2020; Segal et al., 2015).

Previous post-war pandemics were far smaller but reported a significant impact on the tourism sector e.g. SARS outbreak of 2003 on Toronto's tourism economy (especially hoteliers) was 20% reduction in room occupancy and a \$ 111 million loss in room revenues for the second quarter of 2003 and year to year comparison had 47% to 72% (2002 to 2003), causing an overall revenue loss of \$342.5 million for 4 months in 2003 (Tew, Lu, Tolomiczenko, & Gellatly, 2008). The reported impact and number of COVID-19 cases are already eight or nine times larger (worldwide) than the 2003 SARS, pointing to an upcoming economic recession (Fernandes, 2020). Data from SARS, as

well as the Spanish Flu from 1918, provides some idea of the economic shocks posed by the COVID-19 outbreak (Fernandes, 2020). The economic slowdown from both domestic and international tourists is evidenced (Hoque et al., 2020). Many of the nation's hit hardest by COVID-19 are among the ten largest economies in the world in G7 economies e.g. The US, China, Japan, Germany, Britain, France, and Italy, they account for 60% of world supply and demand (GDP) (Wyplosz, 2020). Chinese tourism is considered as one of the world's most viewed outbound, 10 % of global tourists and the coronavirus attacked in one of its busiest seasons when millions were traveling (Hoque et al., 2020). The decreased tourist numbers have led to declining demand for travel, hotel rooms, gifts, and food consumption (Dinarto et al., 2020; Fernandes, 2020; Riley et al., 2020; Yang et al., 2020) While service-oriented economies will take the larger hits, demand for transportation, restaurant, traveling, tourism, and cinemas have declined sharply (Dinarto et al. 2020).

Tourist destinations are deserted, airlines are grounding fleets and firing staff, trade fairs and cruises have been cancelled, hotels and casinos closing all operations (Fernandes, 2020). International tourism is disrupted due to travel restrictions and the reduction of airline flights (Estrada et al. 2020; Fernandes, 2020). Suspended domestic and overseas group tours, and suspended sales of certain travel products such as flight tickets and hotel bundle packages have largely affected the industry (Estrada et al., 2020). Estrada et al. (2020) estimated that in the tourism sector, demand will contract by 75% and a rise in the unemployment rate to 10%. People staying away from work to tend to sick relatives or imposing of quarantine are also causing indirect temporary employment reduction (Strielkowski, 2020).

Estrada et al. (2020) estimated that in the tourism sector, demand will contract by **75%** and a rise in the unemployment rate to **10%**.

The global travel industry from airlines to cruise companies, from casinos to hotels is facing reductions of activity of more than 90% (Fernandes, 2020). COVID-19 will have ramifications for the global economy and trade e.g. since cross-border travel and tourism accounted for 52.7% of services imports and 14.8% of services exports in 2018 (Estrada et al., 2020). Preliminary estimates, global airlines might lose around \$113 billion in sales (Riley et al., 2020). The air transportation sector sees a dramatic drop of 85% in demand, an unemployment rate of 20%, and a contraction of 45% in the stock market index (Wyplosz, 2020). Norwegian Air to cancel 85% of flights and lay off 90% of staff, German tourism giant TUI has requested state aid and many cruise lines have suspended sailing (Hoque et al., 2020). Also, Airbnb and Uber reported a decline in their activities (Strielkowski, 2020).

Kenya is among the biggest tourism economies in Africa and the tourism sector is among the major contributors to the gross domestic product (GDP) accounting for approximately 10%. It is a major source of employment for the locals with approximately 10-12% of the labor force (GoK, 2020). Kenya has experienced a steady increase in both local and international tourism from the year 2015 to 2017 with international visitor arrivals increasing to 2,035,400 in 2019 KNBS, (2020), an increase of 1.167% from the year 2018 (TRI, 2019). Kenya's

tourism revenue in 2019 was healthy at USD 1.61 billion with 4.956 million bed nights sold compared to 4.489 million in 2018 (GoK, 2020). The tourism industry has suffered several setbacks in the past from 1990s tourists' killings, 1998 embassy bombing, to 2007 post-election violence, terror attacks, travel advisories that affected international arrivals, and the current COVID-19 pandemic. Before the Covid-19 pandemic, the international arrivals were projected to reach 2,100,000 in 2020 to attain the Third Medium Term Plan M2018-2022 (GoK, 2018). None of the prior mentioned challenges have affected the tourism sector in Kenya and elsewhere as the Covid-19 pandemic, halting the demand for international travel, significantly affecting the tourism sector in Kenya. This paper examines the impacts of COVID-19 on tourism businesses, communities and conservation and explores lessons learned for a sustainable recovery in Kenya's leading conservation area, Masai Mara. Understanding the impacts is essential in informing the designing of recovery plans and policy initiatives to support recovery both in the short and long term.

Kenya is among the biggest tourism economies in Africa and the tourism sector is among the major contributors to the gross domestic product (GDP) accounting for approximately

10%

02

METHODOLOGY



2.1

Tourism context of Kenya and Masai Mara

Kenya is one of the East African countries with tourism as the second-largest source of foreign exchange revenue after agriculture (De-Blij et al., 2011; GoK, 2020). Kenya has a total population of 47,564,296 (KNBS, 2019). The top 10 international tourist arrivals for Kenya in the year 2019 include the U.S.A, Uganda, Tanzania, UK, India, China, Germany, France, Italy, and South Africa in the order (TRI, 2019). The tourism sector in Kenya depends largely on international arrivals (TRI, 2019). Kenya has diverse tourism products including pristine beaches, world-renowned wildlife, indigenous culture, and a hospitable population.

Masai Mara covers an area of 1672 Km² and is one of the world's top tourist attractions and a premier conservation area in Kenya. It is home to the big 5 and hundreds of animal and bird species. It is a top attraction within the migration path of the over 1 million Wildebeests, an annual spectacular scene that attracts hundreds of thousands of domestic, regional and international tourists. Masai Mara is a prime viewing spot of wildebeest migration since the status of the 7th wonder of the world according to Union for the Conservation of Nature (IUCN). According to IEA Kenya (2016), in 2011 the reserve received 138,200 international visitors and the number increased to 146,900 in 2015 marking a 6% increase over 5 years. In recent years, before the COVID-19 pandemic, it was estimated that approximately 300,000 domestic and international tourists visit the reserve each year. A peak number of 316,500 visitors were recorded in 2006 when the Reserve's entrance fees alone netted 5.5 million US dollars. The indigenous community living around the reserve is majorly the Masai people whose livelihood is largely dependent on tourism. In 2019 an estimated 1.2 million community members and 13,236 landowners were dependent on tourism (KNBS, 2019). These communities are actively involved in community-based tourism and wildlife protection, safeguarding wildlife habitat while deriving livelihoods from tourism.

2.2

Data collection and analysis

Field survey involving habitat observation, ecosystem analysis based on observation vegetation status, land cover, the status of water systems, relative wildlife distribution, the general outlook of numbers without counts, species observed (diversity) was employed. Wildlife detail e.g. presence of young ones, patterns of movement, and indications of breeding, and relative numbers of females was used to deduce the ecosystem health. The status of businesses to establish arrivals, flight landings and take-offs, tour vehicle traffic, and the level of operation of lodges were observed. Status at the cultural tourism sites regarding the level of activity, the volume of business, observable vulnerabilities and adaptation mechanisms were observed as well. Field survey through photography and filming provided evidence on the crisis and adaptation measures (<https://youtu.be/jQ04DxcNVml>) for public information.

1. **Key informant interviews; interviewing key players including lodge managers, lodge staff, county government officials, conservancy managers, and protected area manager and community representatives.**
2. **Desktop review on past pandemics and adaptation strategies mechanisms on the global scale to give reference of analysis of the case of Mara. Review of county integrated development plan (CIDP) to establish linkage, gaps and options for policy direction on tourism recovery and sustainability.**
3. **Focus Group Discussion involving key stakeholders in the Masai Mara game reserve (Table 1).**

Masai Mara covers an area of

**1672
sq. Km**

and is one of the world's top tourist attractions and a premier conservation area in Kenya.



Project team engaging in the field drive

In 2019 an estimated
1.2 million community
members and **13,236**
landowners were
dependent on tourism.

Table 1: Sampling plan for FGDs

Stakeholder Group	Number	Focus of interest
Conservancy managers	9	Recovery of the ecosystem, adaptation and new strategies conservation for conservation management.
Narok County Government	4	Impacts to conservancies, reserve, community and businesses and possible policy interventions for tourism recovery and sustainability of conservation management
Lodge managers	6	Tourism recovery, and sustainable tourism business management
Reserve Revenue collector	1	Revenue optimization
Conservancy Management Association	2	Tourism recovery, sustainable conservation land management, community interest.
Community	3	Tourism recovery, community livelihoods
Total	25	

Analysis of content from the FGD was done by organizing them into themes. Factors that were raised across the groups were considered critical for recovery. They were used to develop the schematic diagram of the COVID-19 Tourism Recovery Wheel. Items mentioned across all the groups with key

strategic outcomes for conservation communities and business was prioritized for policy recommendations. The outputs were organized into impact, lessons learned, adaptations and policy recommendations.



Lodge Manager interview - Narok County Tourism Recovery Project

03

FINDINGS



3.1. Impact of Covid-19 on Conservation

COVID-19 motivated multi-level relationships, partnerships and collaborations to support communities with food resources during the pandemic. Multi-level relationships, partnerships and collaborations supported communities during the pandemic. Community projects e.g. schools, dispensaries and education programmes were halted. Communities lacked basic needs like food due to a lack of funding from the lease for the conservation programme, which got delayed. Also, funding for conservation projects got delayed or stopped, negatively affecting community conservation initiatives e.g. payment of land rates. Teenage pregnancy, early marriages, and school dropouts were impacts identified by the community. Loss of market for the beadwork largely affected the livelihoods of the community. The beads work has a huge potential for communities and empowering women with an estimated return of USD-20 on the low season to USD 400 per day. Fears of lost gains in sustainable approaches to local livelihoods e.g. return to charcoal burning and poaching that could likely compromise the conservation attitude of the local community. Unpaid or reduced land lease payments affected the community landowners. The community lost jobs; workers in the lodges went without pay or on pay cuts. Some facilities released staff immediately after the COVID-19 hit. Food insecurity was high among the locals as they became dependent on food donations.

e.g. payment of land rates. Teenage pregnancy, early marriages and school dropouts were impacts identified by the community. The women's market day for the sale of beads ceased and so was the Moran dance and entertainment activity. Unpaid or reduced land lease payments affected the community landowners. Loss of market for the beadwork largely affected the livelihoods of the community. They lost jobs; workers in the lodges went without pay or on pay cuts. Some facilities released staff immediately after the COVID-19 hit. Food insecurity among the locals and became dependent on food donations, from high-end dollar value to no food. The beads work has a huge potential for communities and empowering women with an estimated return of USD-20 on the low season to USD 400 per day. Fears of lost gains in sustainable approaches to local livelihoods e.g. return to charcoalburning and poaching that could likely compromise the conservation attitude of the local community.

3.2. Impact of Covid-19 on communities

COVID-19 motivated multi-level relationships, partnerships and collaborations to support communities with food resources during the pandemic. Multi-level relationships, partnerships and collaborations supported communities during the pandemic. Community projects e.g. schools, dispensaries and education programmes were halted. Communities lacked basic needs like food due to a lack of funding from the lease for the conservation programme, which got delayed. Also, funding for conservation projects got delayed or stopped, negatively affecting community conservation initiatives



Mzee Kipas - Chief of Masai Village, Maasai Mara

3.3. Impact of Covid-19 on tourism businesses

Lodges and tour operators were not able to meet the financial obligations to employees, suppliers, financiers and regulatory agencies. There was a reduced level of tourism businesses with full closure between April-November 2020. Lodges visited were open including Ololonana, Kichwa Tembo and Mara Serena and were receiving guests. There was low-scale maintenance with a gradual return to the business at the lodges and in tour operation. Vessels were observed in the reserve giving indications of building tourism activities; tour vans, air balloons, flight landings, guest arrivals at the lodges visited and reported room occupancies that were projected to reach 75% in the third quarter of 2021. A mix of readiness and anxiety due to the trend of COVID-19 with possible impromptu lockdowns that could change the trend of bookings based on experience was evidenced.

There was an extra investment in compliance to the COVID-19 protocols and safety preparedness at the lodges, airstrip landings and at the cultural BOMA to enhance safety and tourist confidence, e.g. luggage UV sterilization and sanitization procedures at the lodges. Safety handling procedures at the dining e.g. use of polythene paper gloves at the food handling points. Adherence and observation of COVID-19 protocols and safety preparedness at the lodges, airstrip landings and at the community cultural tourism sites were emphasized. The study established a growing interest in domestic and regional tourists among the lodge owners and tour operators (Table 1).

75%

Vessels were observed in the reserve giving indications of building tourism activities; tour vans, air balloons, flight landings, guest arrivals at the lodges visited and reported room occupancies that were projected to reach 75% in the third quarter of 2021.

Lodge businesses projected an increase in lodge occupancies to an average of 75%.

3.4. Lessons learned

Designated conservation regeneration time could promote habitat regeneration after an active tourism period. The need to accelerate vaccination at the destination to enhance the confidence of tourists is urgent. The uncertainty is due to overdependence on tourism by communities and the need for alternative economic models for communities in Masai Mara. Key community projects e.g. schools, dispensaries and education programmes could be supported through multi-level partnerships besides corporate social responsibility (CSR) and conservation philanthropy. Tourism-dependent conservation is a threat to the sustainability of community conservancy models. The hidden potential of domestic and regional tourism markets in sustaining destinations and businesses, in 2020 and the first half of 2021 budgets of lodges and tour businesses were carried by domestic and regional tourists. Emerging international and stable markets e.g. Mexico has emerged as a new market while the USA has remained a stable market. Tourists from America have shown confidence in the destination, hence, a stable international market. It is expected that many other international markets will emerge. The

importance of loyalty programmes, the loyal travelers have become the first to return and those who kept their bookings prompting the need to enhance loyalty programmes to enhance the rate of travel uptake. Cost management and efficient resource use have drawn interest among managers of lodges. The role of innovation and technology in tourism practice e.g. social media marketing and the use of digital platforms in marketing are on the rise. Insurance, contingency and emergency fund to support staff salaries in case of future pandemics and Insurance of community BOMAS which are key facilities for cultural tourism to secure livelihoods has been proposed. The need to train staff on diverse skills to be able to cope with sharp pandemic/calamity-induced changes at the workplace has been indicated to be important. Diversification of community economic activities beyond tourism to support the community in case tourism is affected. There is a need for accelerated vaccination to boost traveler confidence (Table 1).

Table 2: Summary of impacts of COVID-19, lessons learned adaptations and critical factors for recovery in Masai Mara National Reserve, Kenya. Information based on Focus Group Discussions (FDGs) by Conservancy managers, Narok county Government officials, Lodge managers, Reserve Revenue collector, Conservancy Management Association, Community representatives and Tour operators

Impact	Lessons learned	Adaptation and new trends	Critical factors for Recovery	Emerging issues at the destination for policy consideration
Ecosystem Health: Ecosystem regeneration due to reduced tourism activity in the Mara ecosystem.	Conservation Regeneration Time: The need for a regeneration period for the reserve.	Reserve, conservancy, external funders and industry players collaborate for conservation.	Increase in partnerships including governments (County and national), donors, conservationists and development partners.	Proper legislation on tourism development.
The role of partnerships and collaboration for sustainable financing of community-based programs: Multi-level relationships, partnerships and collaborations supported communities during the pandemic.				A policy guideline on Tourism development in the Mara ecosystem to support conservation outside the protected areas and to promote partnership between conservancies and the reserve for synergy.

MASAI MARA TOURISM RECOVERY PROJECT 2021

Impact	Lessons learned	Adaptation and new trends	Critical factors for Recovery	Emerging issues at the destination for policy consideration
Conservation threat: Lack of funding for conservation projects which got delayed or stopped negatively affected community conservation initiatives.			Sustaining community livelihood through lease payments. Synergies for conservation between conservancies and the reserve. Increase land cover under community conservation. Joint patrols between conservancies and the reserve.	Policy on research-based conservation, possible establishment of a research unit for the Mara to provide data for making informed conservation decisions.
Reduced level of tourism businesses: The full closure of the game reserve between April-November 2020. "for the first time Mara went quiet". From November 2020 onwards there was minimal business. Overall confidence in the trend of the tourism activity, "looking good".	The hidden potential of domestic and regional tourism markets: Emerging international and stable markets: New markets have emerged e.g. Mexico. Tourists from America have shown confidence in the destination and therefore a stable market. The importance of loyalty programmes for return travellers. Efficient resource use: The role digital marketing	Partial closure of businesses, reduced operation capacity, phased opening and innovative staffing approaches to ensure minimum impact on individual staff, staff shifts. Resource efficiency Cost management. Exploring new markets e.g. Mexico and maintaining stable markets e.g. USA Lowered rates for local and regional markets.	Marketing Mara as a destination. Product and market diversification: Diversify products to build all year round products and to attract corporates, domestic and regional markets. Continued Covi-19 support framework. Sustainable initiatives to fund SMMEs for recovery, incentives and loyalty programs. Stakeholder collaboration and partnership as a cross-cutting issue. Capacity development on recovery initiatives.	Review Park fee and Vehicle passes to operators for the recovery period and consider restructuring license and certification fee. Strategic marketing of Masai Mara as a destination. Strategy on holistic Narok County Tourism development and marketing.
Loss of employment: Loss of employment, change of employment patterns, low staff numbers, JD changes, pay cuts, reduced, businesses slowly opening. Loss of revenue from the local transport sector.	Provision of reserve for staff salaries. Some facilities released staff immediately after the COVID-19 hit. Staff versatility The importance of staff engagement. Diversification of sources of income.	Communication and Staff management. Staff working in shifts, modified scope of staff JDs, pay review.		
Loss of property and idle assets: Loss to loans for investors in tourism e.g. tour operators. Idle assets like tour vans bought for tourism businesses, lodges and taxis. Loss of property due to unpaid debts.	Exploration of alternative uses of the assets.	Using tour vans for other duties.		

Impact	Lessons learned	Adaptation and new trends	Critical factors for Recovery	Emerging issues at the destination for policy consideration
Maintained tourism infrastructure: Maintenance of the physical infrastructure. There was ample time to maintain roads and airstrips. The road network and the status of the airstrips were good.	The regeneration period can also be used for the maintenance of physical infrastructure in the reserve including access roads, airstrips, etc.			
Extra investment in compliance with the COVID-19 protocols: Adherence and observation of COVID-19 protocols and safety preparedness at the lodges, airstrip landings and at the community cultural tourism sites.	Insurance, contingency and emergency fund: Contingency budgeting for lodges, tour operators and the BOMAS to set funds for calamity in case of future pandemics or calamity of similar or higher magnitude.	County government COVID response strategy worked. COVID mitigation measures also worked.	Safety measures and adherence to COVID-19 protocol: Public health initiatives, compliance and COVID-19 testing. Focus on enhanced hygiene, health and safety confidence. Health protocols and precaution measures and guidelines. Enhanced vaccination rate: Promote vaccine availability and access to COVID-19 testing. Public health initiatives, certification and compliance of facilities to Covid-19 protocols.	
The growing interest in domestic and regional tourists: Lodges and tour operators have a growing interest in local and domestic tourists.		Lowering rates/prices for local travellers (there is a need to establish sustainable pricing for local travellers. Local to regional markets (Uganda, Tz etc.)	Re-modeling Marketing strategy for the local and regional markets. Think selling in local currency for the local and regional tourists (\$ verses, local currency). Partnership and stakeholder collaborations: Media initiatives through a partnership and collaboration approach between national, and county governments, and tourism and conservation players.	A strategy for long-term collaboration with local media for strategic marketing to the local and regional markets.
Vulnerability of local community: the desperate situation in 2020 attributed to loss of jobs and businesses due to the absence of tourism.	Diversifying community economic activities: Diversifying beyond tourism to support the community in case tourism is affected. Exploring other economic ventures to relieve overdependence on tourism	Economic diversification: Economic diversification beyond tourism. Rethinking funding sources for community projects e.g. including them in the county development plan. Slow resumption of the bead market in the lodges. Community sold cattle, sheep, and goats to support families.	Community Support Fund: The 19% Masai Mara community support fund significantly supported cushioning the community. Managing community expectations. Socio-economic re-engineering strategy. Capacity building for the community on basic business management principles and entrepreneurship.	A policy to enhance 19% community support fund. Proper legislation to link tourism revenue and conservation management. Strong land-tenure system to protect land under conservation e.g. policy on land use ownership to limit subdivision.

3.5. Critical Factors for Recovery

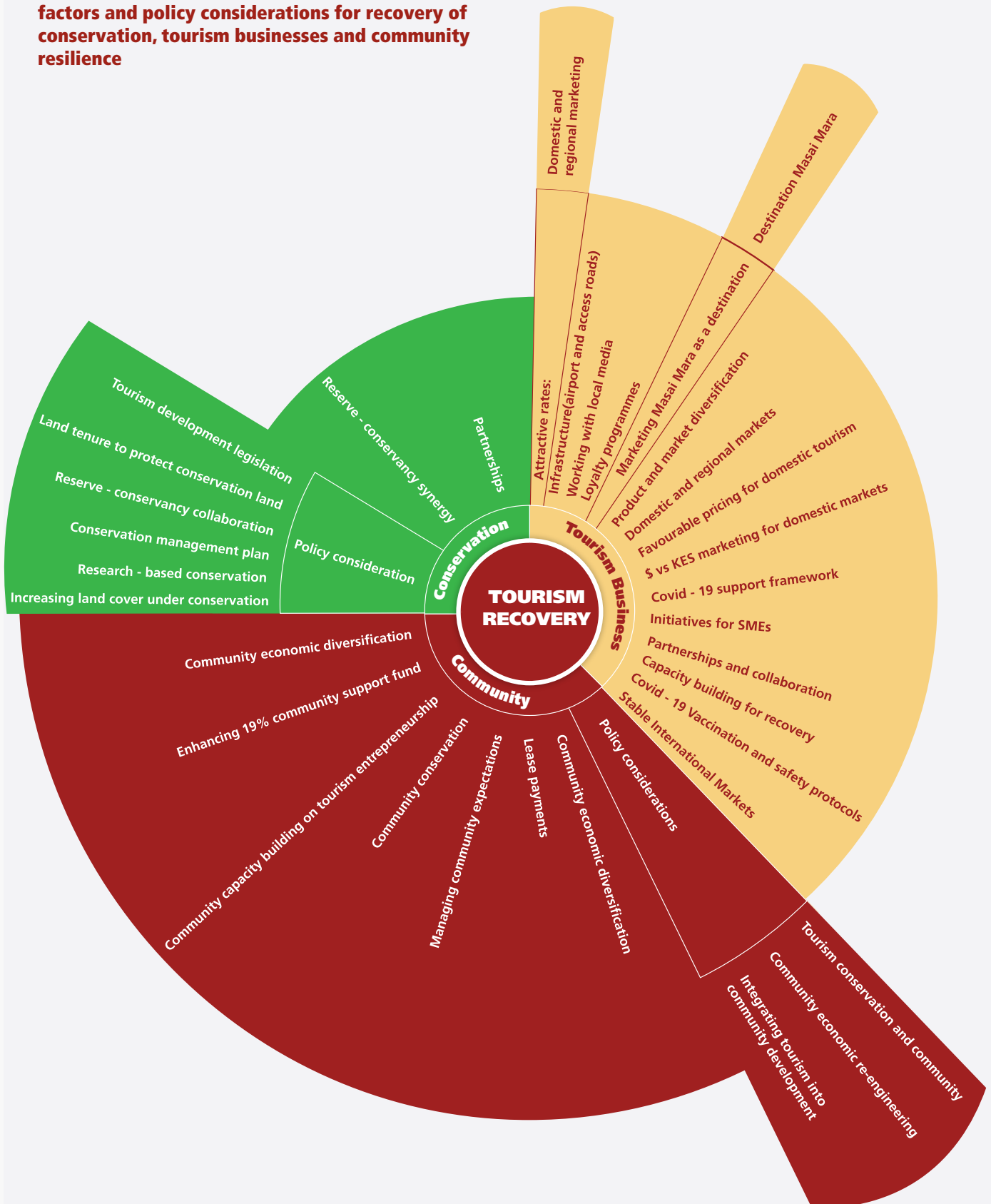
Enhanced vaccination rate by promoting vaccine availability and access to COVID-19 testing was identified as critical for recovery. Strong land tenure system to protect land under conservation e.g. policy on land use ownership to limit sub-division was considered critical to protect community land under conservation. Collaboration between reserve and community conservancies to establish synergies for conservation, while the partnership with local media for marketing of the conservation area to the domestic market. Maintaining lease payments was established to be critical to sustaining community livelihoods. The need to expand infrastructure (airports and road access) was also established to be critical. Work with local media to market domestic tourism. Re-building a strong customer base through marketing, attractive rate strategies, service excellence and loyalty programmes. Re-inventing the community economic model from the overdependence on tourism and rethinking funding sources for community projects

e.g. health care and education. It was suggested that these basic projects be prioritized in the county development agenda. Continued Covi-19 support framework on park fee, vehicle pass and license fees waivers were proposed to ensure businesses thrive, having paid for the whole year 2020 without the business in more than half of the year. Sustainable initiatives to fund tourism Small, Micro, and Medium Enterprises (SMMEs) to incentivize the locally owned business to recovery. Motivating and re-building strong customer confidence for return travellers through, loyalty programs were observed to be critical. Stakeholder collaboration and partnerships to promote capacity building of industry players on emerging skills and awareness on emerging issues could largely motivate recovery. The need to review product offers and pricing to respond to the local and changing market needs. Operators are considering a long-term plan to fix the debate on developing favourable products and pricing for the domestic market (Figure 1).



Stakeholders Workshop

Figure 1 : The tourism recovery wheel: Critical factors and policy considerations for recovery of conservation, tourism businesses and community resilience



04

DISCUSSIONS



4.1. Sustainable approaches to recovery

Economic consequences of pandemics can be **devastating and long - lasting.**

Liberia's GDP declined by 8 % from 2013 to 2014 (Fernandes, 2020). This is the first time we see a global pandemic of such an unprecedented scale broadcasted in real-time (Strielkowski, 2020). A range of policy responses will be required both in the short term, McKibbin & Fernando (2020) to enhance tourist arrivals and expenditures to grow at a rate that is faster than the historical growth trend, the "catch-up" period to achieve full recovery. During the 9/11 crisis, many countries lowered their regulatory barriers to international visitors e.g. Singapore which had visa waiver agreements with well over 150 countries in the world saw its international travel recover quickly from waves of external shocks and then surpass its pre-9/11 peak (McKibbin & Fernando, 2020). Developing a recovery framework with standards for business continuity, pandemic adaptation plans (Dalton, 2006) and laying strategy for mitigation of the underlying drivers of disease emergence for conservation consideration (Marco et al. 2020).

There is a growing interest in domestic and regional tourist markets which sustained tourism businesses when the international tourists were not able to travel in the larger part of 2020. The majority of the 2020 travellers were local guests pointing to the need to grow tourism from within, largely informed by the needs of the local-regional market before considering the international market. Effective product and service pricing for the local and regional markets have been seen to be critical. Lodges lowered the rates for the local markets and are considering defining the market rate for the segment. The importance of partnerships to recovery has been highlighted in engaging the travel trade to take quick actions (Mair et al., 2016). Partnering in promotional fares and short-term low prices were used to encourage travel following the outbreak of SARS in South East Asia, McKercher & Pine (2005) and after the Bali bombings (Henderson, 2008). Discounts and promotional fares were also successful in tourism recovery in Canada after a devastating forest fire (Hystad & Keller, 2008). Loyal visitors are most likely to respond to post-disaster-marketing messages and are likely to be among the first visitors to return (Walters & Clulow, 2010; Walters & Mair, 2012). This informs the need to promote loyalty programmes at the destination. McKercher & Pine (2005) propose that businesses should consider displaying 'Welcome Back' messages, to thank their customers for returning and to maintain the goodwill of repeat visitors. This highlights the importance of relationship marketing to aid the recovery process. The industry is encouraged to focus on market research and communication (Mair et al., 2016) to restore confidence in the destination before the commencement of recovery marketing. The extra investment by lodges in hygiene and safety protocols is intended to build the confidence of the tourists to

the destination.

Although the impact is expected to continue for some time (Hoque et al., 2020), there is a need for greater efforts by governments to ease travel restrictions around the world, and remove inconveniences faced by those interested in visas is (Bonham et al., 2006). Easing travel restrictions to virus-free travellers would help to breathe new life into the tourism and service industries (Strielkowski, 2020). Government fiscal policy on support of Small, Medium and Micro Enterprises (SMMES) in tourism will be necessary to continue. Engaging with government and regulators as part of a recovery strategy for fiscal and financial support e.g. in the aftermath of the 2004 Boxing Day Tsunami, the Thai government offered businesses

loans, grants, and equity sharing deals to speed up recovery and reconstruction (Segal et al., 2015). The government plan to enhance the vaccination rate will build the confidence of travellers e.g. American tourist numbers were mentioned by lodge managers as the highest number of travellers in Masai Mara, attributed to the high vaccination rate in the USA. Therefore, it is advised that the government promote vaccine availability and access to COVID-19 testing. The current COVID-19 testing initiatives and compliance supplies have been observed not to be working. Targeted vaccination drives at key

tourist destinations for staff working for lodges and in tour operations, and country-wide vaccination uptake could largely promote tourist confidence.

McKercher and Pine (2005) propose that businesses should consider displaying 'Welcome Back' messages, to thank their customers for returning and to maintain the goodwill of repeat visitors.

4.2. Policy initiatives to support recovery

As a lesson from history, much of the economic problems from the 1970s oil shock came from the inflation sparked by inappropriate macroeconomics policy responses, not just the actual oil shortage; this can be linked to COVID-19. The size and persistence of the economic damage will depend on how governments handle policy interventions. Monetary policy action should be intended to support Small and Medium-sized businesses which are most exposed to liquidity (Wyplosz, 2020). There is a need for a coordinated policy response to the impacts of COVID-19 (Fernandes, 2020). Managing economic recession due to COVID-19 will be dependent on the success of government policies to alleviate liquidity problems of the SMMES and to secure jobs for the citizens (Fernandes, 2020). In the face of real and financial stress like in the pandemic period, the role

of governments is critical both at the county and national governments. The shock is not only demand management, but multi-faceted and will require monetary, fiscal, and health policy responses (McKibbin & Fernando, 2020). The government fiscal policy should be comprehensive to care for SMME (Buseh et al., 2015). An emerging conservation issue is to assess the role of wildlife diversity not only in terms of the number of species (or their abundance) but also in terms of the capacity to mitigate and reduce emerging infectious diseases (EID) and zoonosis (Marco et al., 2020). Proper legislation to integrate community livelihoods and tourism development while diversifying the economic venture of the communities will be in order. A policy guideline to promote partnership for ecosystem-wide management between protected areas and outside protected areas to create synergies between conservancies and the reserve has been proposed, and a strategy on holistic Narok County Tourism development and marketing will be timely.



H.E. Hon Tunai Ole Kuntai

REFERENCES

1. Bonham, C., Edmonds, C., & Mak, J. (2006). The Impact of 9/11 and Other Terrible Global Events on Tourism in the U.S. and Hawaii. *The Impact of 9/11 and Other Terrible Global Events on Tourism in the U.S. and Hawaii*, 45(1), 99–110. <https://doi.org/10.1177/0047287506288812>
2. Breisinger, C., Raouf, M., Wiebelt, M., Kamaly, A., & Karara, M. (2020). Impact of COVID-19 on the Egyptian economy: Economic sectors, jobs, and households (6th ed.). Intl Food Policy Res Inst.
3. Buseh, A. G., Stevens, P. E., Bromberg, M., & Kelber, S. T. (2015). The Ebola epidemic in West Africa: Challenges, opportunities, and policy priority areas. *Nursing Outlook*, 63(1), 30–40. <https://doi.org/10.1016/j.outlook.2014.12.013>
4. Dalton, C. B. (2006). Business Continuity Management and Pandemic Influenza. *New South Wales Public Health Bulletin*, 17(10), 138–141. <https://doi.org/10.1071/nb06035>
5. De-Blij, H. J., Muller, P. O., & Jan, N. (2011). *The World Today: Concepts and Regions in Geography* (5th Ed.). John Wiley & Sons. <https://bit.ly/3wAWhxN>
6. Dinarto, B. D., Wanto, A., & Sebastian, L. C. (2020). COVID-19: Impact on Bintan ' s Tourism Sector. RSIS Commentary. <https://www.rsis.edu.sg/rsis-publication/rsis/global-health-security-covid-19-impact-on-bintans-tourism-sector/#.YYyT1mBBxhE>
7. Estrada, M. A. R., Park, D., & Lee, M. (2020). The Evaluation of the Final Impact of Wuhan COVID-19 on Trade, Tourism, Transport, and Electricity Consumption of China. In *Tourism, Transport, and Electricity Consumption of China*.
8. Fernandes, N. (2020). Economic Effects of Coronavirus Outbreak (COVID-19) on the World Economy (No. WP-1240-E). <https://ssrn.com/abstract=3557504>
9. GoK. (2018). Third Medium-Term Paper 2018-2022. <https://doi.org/Kenya Vision 2030>
10. GoK. (2020). Government of Kenya COVID-19 and Travel and Tourism Policy in Kenya brief. <https://www.tourism.go.ke>
11. Henderson, J. C. (2008). Representations of Islam in Official Tourism Promotion. *Tourism Culture & Communication*, 8(3), 135-145(11).
12. Hoque, A., Shikha, F. A., Hasanat, M. W., Arif, I., & Abu Bakar Abdul Hamid. (2020). The Effect of Coronavirus (COVID-19) in the Tourism Industry in China. *Asian Journal of Multidisciplinary Studies*, 3(1), 52–58.
13. Hystad, P. W., & Keller, P. C. (2008). Towards a destination tourism disaster management framework: Long-term lessons from a forest fire disaster. *Tourism Management*, 29(1), 151–162.
14. IEA Kenya. (2016). Number of Visitors to National Parks and Game Reserves, 2011-2015. General. http://ieakenya.or.ke/number_of_the_week/number-of-visitors-to-national-parks-and-game-reserves-2011-2015/
15. KNBS. (2019). 2019 Kenya Population and Housing Census Volume 1: Population by County and Sub-County. In *2019 Kenya Population and Housing Census: Vol. I (Issue November)*. <https://www.knbs.or.ke/?wpdmp-pro=2019-kenya-population-and-housing-census-volume-i-population-by-county-and-sub-county>
16. KNBS. (2020). Kenya Economic Survey 2020. In *Economic Survey*. <https://doi.org/10.4324/9781315016702>
17. Mair, J., Ritchie, B. W., & Walters, G. (2016). Towards a Research Agenda for Post-Disaster and Post-crisis Recovery Strategies for Tourist Destinations: A Narrative Review. *Current Issues in Tourism*, 19(1), 1–26. <https://doi.org/10.1080/13683500.2014.932758>
18. Marco, M. Di, Baker, M. L., Daszak, P., de Barro, P., Eskew, E. A., Godde, C. M., Harwood, T. D., Herrero, M., Hoskins, A. J., Johnson, E., Karesh, W. B., Machalaba, C., Garcia, J. N., Paini, D., Pirzl, R., Smith, M. S., Zambrana-Torrel, C., & Ferrier, S. (2020). Sustainable development must account for pandemic risk. *Proceedings of the National Academy of Sciences of the United States of America*, 117(8), 3888–3892. <https://doi.org/10.1073/pnas.2001655117>

19. McKercher, B., & Pine, R. (2005). Privation as a Stimulus to Travel Demand? In L. Eric & R. B. Prideaux (Eds.), *Tourism Crises: Management Responses and Theoretical Insight* (1st Ed., p. 10). Routledge Taylor & Francis Group.
20. McKibbin, W. J., & Fernando, R. (2020). The Global Macroeconomic Impacts of COVID-19: Seven Scenarios. *Asian Economic Papers*, 20(2), 1–30. <https://doi.org/10.2139/ssrn.3547729>
21. Riley, T., Elizabeth, S., Zara, A., & Ann, B. (2020). Potential Impact of the COVID-19 Pandemic on Sexual and Reproductive Health in Nepal. *International Perspectives on Sexual and Reproductive Health*, 46(2), 73–76. <https://doi.org/10.33314/jnhrc.v18i2.2747>
22. Segal, H., Oaten, S., & Le Quesne, K. (2015). Adapting to Uncertainty - The Global Hotel Industry. *The Travel & Tourism Competitiveness Report*, January 2010, 47–51.
23. Strielkowski, W. (2020). International Tourism and COVID-19: Recovery Strategies for Tourism Organisations. In *Preprints* (Vol. 1, Issue March). <https://doi.org/10.20944/preprints202003.0445.v1>
24. Tew, P. J., Lu, Z., Tolomiczenko, G., & Gellatly, J. (2008). SARS: Lessons in Strategic Planning for Hoteliers and Destination Marketers. *International Journal of Contemporary Hospitality Management.*, 20(3), 332–346.
25. TRI. (2019). Tourism Sector Performance report. [https://www.tri.go.ke/wp-content/uploads/2020/01/Tourism Sector Performance Report 2019.pdf](https://www.tri.go.ke/wp-content/uploads/2020/01/Tourism-Sector-Performance-Report-2019.pdf)
26. UNWTO. (2020). International Tourist Arrivals Could fall by 20-30% in 2020. All Regions. <https://www.unwto.org/news/international-tourism-arrivals-could-fall-in-2020>
27. Walters, G., & Clulow, V. (2010). The tourism market's response to the 2009 Black Saturday Bushfires: The Case of Gippsland. *Journal of Travel and Tourism Marketing*, 27(8), 844–857. <https://doi.org/10.1080/10548408.2010.527250>
28. Walters, G., & Mair, J. (2012). The Effectiveness of Post-Disaster Recovery Marketing Messages—The Case of the 2009 Australian Bushfires. *Journal of Travel & Tourism Marketing*, 29(1), 87–103. <https://doi.org/10.1080/10548408.2012.638565>
29. Wyplosz, C. (2020). The Good Thing About Coronavirus. In R. Baldwin & B. W. di Mauro (Eds.), *Economics in the Time of COVID-19* (p. 113). Centre for Economic Policy Research (CEPR).
30. Yang, Y., Zhang, H., & Chen, X. (2020). Coronavirus pandemic and tourism: Dynamic stochastic general equilibrium modeling of infectious disease outbreak. *Annals of Tourism Research*, 83(102913.). <https://doi.org/10.1016/j.annals.2020.102913>

APPENDIX 1: POLICY BRIEF

POLICY INTERVENTIONS TO ENHANCE TOURISM RECOVERY IN MASAI MARA GAME RESERVE POST-COVID-19

1. EXECUTIVE SUMMARY

The COVID-19 pandemic has brought the tourism world to a standstill with severe impacts on communities, tourism businesses, conservation (Breisinger et al., 2020). The full collapse of international tourism has led to the loss of direct jobs and the growing risks of a global recession associated with massive loss of direct jobs in the tourism industry (Breisinger et al., 2020; Wyplosz, 2020). The UNWTO estimated the international tourist arrivals to decline by 20 to 30 % in 2020, translating to a loss of 300 to 450 US\$ billion in international tourism receipts globally (UNWTO, 2020). COVID-19 has caused combined demand and supply shock to the tourism industry producing large-scale, global, and possibly persistent economic disruption (Dinarto et al., 2020; Wyplosz, 2020). It is already clear that its economic impact would be more severe and devastating than in the case of the Severe Acute Respiratory Syndrome (SARS) in 2002-2003 (Fernandes, 2020; Riley et al., 2020). Overall, the potential impacts of this crisis are larger than any previously seen in history (Fernandes, 2020).

The size and persistence of the economic damage will depend on how governments handle policy interventions to support recovery. Monetary policy action is proposed to incentivize businesses towards recovery. There is a need for a coordinated policy response to the impacts of COVID-19 (Fernandes, 2020). In the face of real and financial stress like in the pandemic period, the role of governments is critical both at the county and national governments in initiating monetary, fiscal, and health policy responses (McKibbin & Fernando, 2020). The government fiscal policy should be comprehensive to care for SMME (Buseh et al., 2015), which are most exposed to liquidity (Wyplosz, 2020). It is an emerging conservation issue to assess the role of wildlife diversity not only in terms of the number of species (or their abundance) but also in terms of the capacity to mitigate and reduce emerging infectious diseases (EID) and zoonosis (Marco et al., 2020). Proper legislation to integrate community livelihoods and tourism development while diversifying the economic venture of the communities will be to enhance the resilience of the communities. There is a need for a policy guideline to promote partnership for ecosystem-wide management between protected areas and outside protected areas to create synergies between conservancies and the reserve. A policy to enhance the 19% community support fund could be a boost to community development projects in health care, Food security, and primary education. A strategy on holistic Narok County Tourism development and marketing will be timely.

2. CONTEXT OF PROBLEM

Covid-19 brought tourism businesses to a standstill leading to loss of businesses, jobs, funds, the vulnerability of communities, and loss of funds for conservation. There is a need for a coordinated policy response to the impacts of COVID-19. Managing economic recession due to COVID-19 will be dependent on the success of government policies to alleviate liquidity problems of the SMMES in the tourism sector and comprehensive policies to secure jobs and businesses of the citizens. The role of governments is critical both at the county and national level to initiate monetary, fiscal and health policy responses to enhance tourism recovery. Proper legislation to integrate community livelihoods and tourism development while diversifying the economic model of the communities near conservation areas will be in order. A new conservation policy should promote partnership for ecosystem-wide management between protected areas and outside protected areas to create synergies between conservancies and the reserve. The size and persistence of the economic damage will depend on how governments handle policy interventions. This policy brief recommends policy initiatives to motivate recovery in the Masai Mara game reserve, with possible applications in other destinations.

3. POLICY RECOMMENDATIONS

- i. A policy to enhance the 19% community support fund for community development projects related to health care, Food security and primary education.
- ii. Policy on research-based conservation, the possible establishment of a research unit for the Mara to provide data for making an informed decision on collaboration between reserve and conservancies. Joint patrols between conservancies and national reserves could be considered in the policy framework.
- iii. Remodeling the community overdependence on tourism and the need to explore ecosystem-based conservation enterprises e.g. beekeeping, trading on gums and resins, and exploring Indigenous Knowledge (IK) for the capital venture.
- iv. Proper legislation to link tourism revenue to conservation and livelihoods of the local people. Re-orienting tourism to local development (community focus, conservation focus, employment focus, entrepreneurship focus (youth and local businesses).
- v. Strategic plan to market Mara as destination leveraging on Africa trade integration
- vi. Synergy to coordinate tourism in protected and outside protected areas
- vii. Policy intervention to accelerate vaccination rate and make easy COVID-19 testing to promote tourist confidence.
- viii. The fiscal policy response in the short and long term
 - a. Broad-based tourism sector-specific financial help for businesses e.g. the case of Singapore post-SARs
 - b. The role of government in tourism business continuity planning-national to regional level lead agency.
 - c. Sustainable financing (SMMES-most exposed to liquidity): scaling the funding for the private sector e.g. Special facilities to keep lending to small businesses as the case in China. The least considered groups for funding (the youth, women, SMMES, etc.). Businesses loans, grants, and equity sharing deals to speed up recovery and reconstruct tourism e.g. Thai government and the 2004 Tsunami.
- ix. National-level policy on free movement concept: Easing travel restrictions and inconveniences in visa acquisition-Virus free travellers will reconnect the world- multilateral agreements to ease travel between countries.
 - a. Lift restrictions in a safe and timely manner based on local risk assessments-round the clock travel intelligence monitoring.
 - b. Target new growth rate-the target is to make tourist arrivals grow at a rate that is faster than the 2019 growth trend, the “catch-up” period e.g. the case of Singapore visa waiver to over 150 countries.
- x. Regional trade engagements: Local and regional integration and partnership to enhance domestic and regional tourism drive-by marketing, products, and strategic pricing.

REFERENCES

1. Breisinger, C., Raouf, M., Wiebelt, M., Kamaly, A., & Karara, M. (2020). Impact of COVID-19 on the Egyptian economy: Economic sectors, jobs, and households (6th ed.). Intl Food Policy Res Inst.
2. Buseh, A. G., Stevens, P. E., Bromberg, M., & Kelber, S. T. (2015). The Ebola epidemic in West Africa: Challenges, opportunities, and policy priority areas. *Nursing Outlook*, 63(1), 30–40. <https://doi.org/10.1016/j.outlook.2014.12.013>
3. Dinarto, B. D., Wanto, A., & Sebastian, L. C. (2020). COVID-19: Impact on Bintan ' s Tourism Sector. RSIS Commentary. <https://www.rsis.edu.sg/rsis-publication/rsis/global-health-security-covid-19-impact-on-bintans-tourism-sector/#.YYyT1mBBxhE>
4. Fernandes, N. (2020). Economic Effects of Coronavirus Outbreak (COVID-19) on the World Economy (No. WP-1240-E). <https://ssrn.com/abstract=3557504>
5. Marco, M. Di, Baker, M. L., Daszak, P., de Barro, P., Eskew, E. A., Godde, C. M., Harwood, T. D., Herrero, M., Hoskins, A. J., Johnson, E., Karesh, W. B., Machalaba, C., Garcia, J. N., Paini, D., Pirzl, R., Smith, M. S., Zambrana-Torrel, C., & Ferrier, S. (2020). Sustainable development must account for pandemic risk. *Proceedings of the National Academy of Sciences of the United States of America*, 117(8), 3888–3892. <https://doi.org/10.1073/pnas.2001655117>
6. McKibbin, W. J., & Fernando, R. (2020). The Global Macroeconomic Impacts of COVID-19: Seven Scenarios. *Asian Economic Papers*, 20(2), 1–30. <https://doi.org/10.2139/ssrn.3547729>
7. Riley, T., Elizabeth, S., Zara, A., & Ann, B. (2020). Potential Impact of the COVID-19 Pandemic on Sexual and Reproductive Health in Nepal. *International Perspectives on Sexual and Reproductive Health*, 46(2), 73–76. <https://doi.org/10.33314/jnhrc.v18i2.2747>
8. UNWTO. (2020). International Tourist Arrivals Could fall by 20-30% in 2020. All Regions. <https://www.unwto.org/news/international-tourism-arrivals-could-fall-in-2020>
9. Wyplosz, C. (2020). The Good Thing About Coronavirus. In R. Baldwin & B. W. di Mauro (Eds.), *Economics in the Time of COVID-19* (p. 113). Centre for Economic Policy Research (CEPR).



**SCHOOL OF TOURISM AND HOSPITALITY,
STRATHMORE UNIVERSITY**

Ole Sangale Road, P.O. Box 59857, 00200, City Square, Nairobi, Kenya

Website: sth.strathmore.edu | E-mail: sth@strathmore.edu



Strathmore University

School of Tourism and
Hospitality

