Country Summary Report: KENYA, JANUARY 2022

AFRICAN NATURE BASED TOURISM PLATFORM



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SURVEY OVERVIEW: The African Nature-Based Tourism platform has developed a survey (https://www.research.net/r/nbtes) to assess the degree to which local communities and small and medium enterprises (SMEs) in the nature-based tourism sector are being impacted by COVID-19. The target audience are community members and SMEs who support the tourism value chain, as suppliers of tourism goods and services, and their associated enterprises, such as lodges, vehicle hire, guiding services, shops, etc. The questions seek to better understand their involvement in conservation and tourism, how the COVID-19 pandemic has affected them, and what their resulting needs are.

These reports present a summary for each country, including an analysis of qualitative data collected through the surveys, and certain quantitative data. The surveys are however more comprehensive than the data presented in these summary reports, so please be sure to visit https://naturebasedtourism.africa/data to explore more of the data, and register to access the database for full survey results.

All photographs by Nikhil Advani



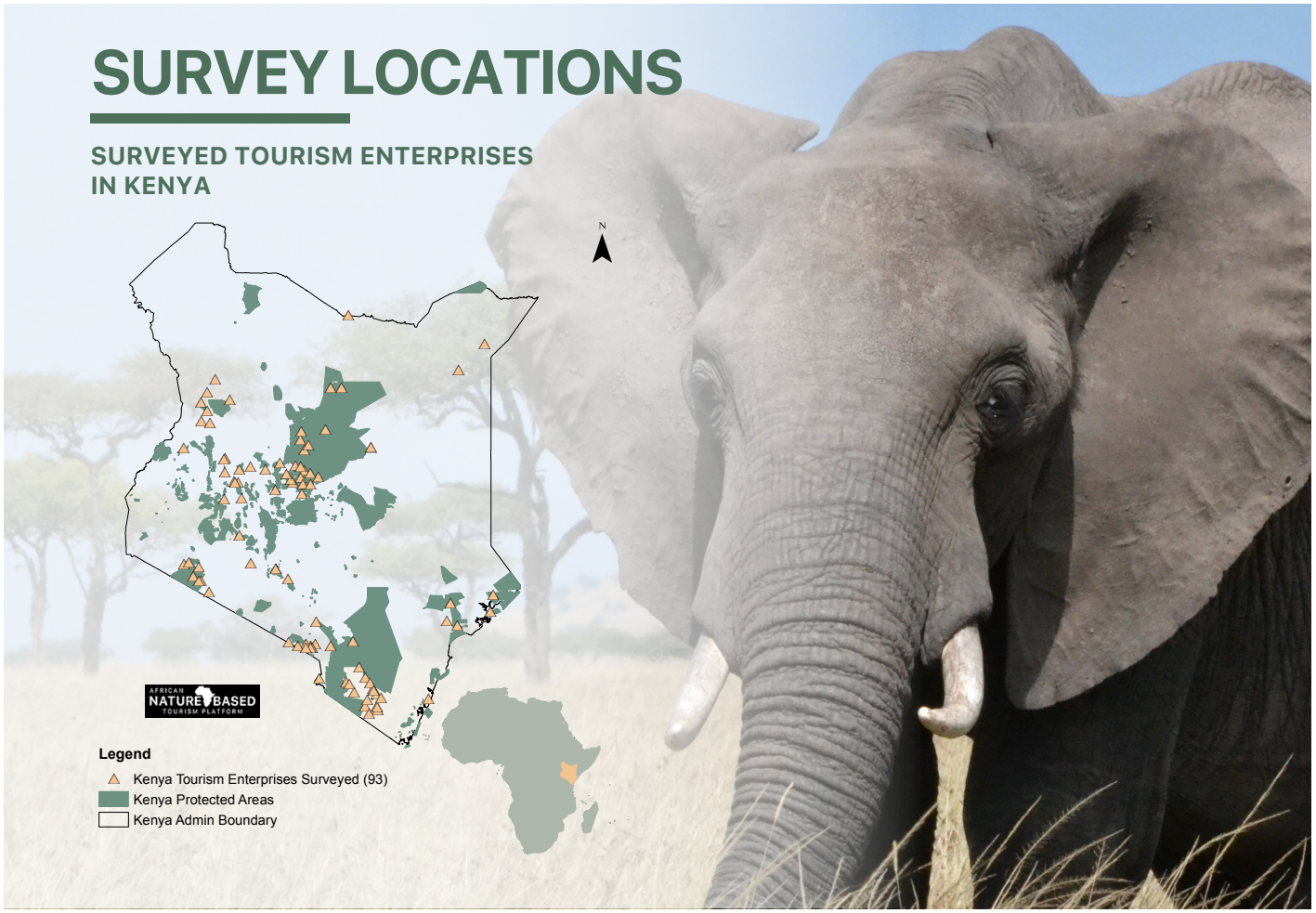
INTRODUCTION

KENYA IS ONE OF THE LEADING DESTINATIONS in Sub-Saharan Africa and is known as "The home of Safari" due to the great migration in the Maasai Mara. Its various habitats provide the opportunity to experience nature, witness wildlife in the open wilderness, and interact with indigenous communities and learn about their histories and ways of life (Juma & Khademi-Vidra, 2019). The Kenyan travel and tourism industry represented 8.1% of the total GDP in 2019 and supported close to 1.6 million jobs (AERC, 2021). The COVID-19 pandemic constrained visitor spending in 2020 which reduced the travel and tourism sector's total contribution to the GDP to 4.2% and jeopardized over 439,000 jobs within the sector (WTTC, 2021).

The African Nature based Tourism Platform worked with the Kenya Wildlife Conservancies Association (KWCA). KWCA works with landowners and communities to sustainably conserve and manage wildlife and their habitat outside formal protected areas for the benefit of the people of Kenya.

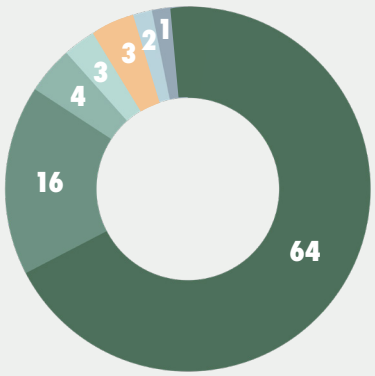
SURVEY LOCATIONS

SURVEYED TOURISM ENTERPRISES IN KENYA



SURVEY RESULTS

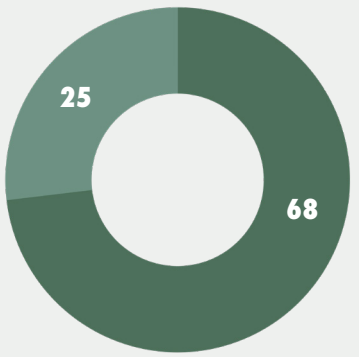
PRIMARY INVOLVEMENT OF THE ENTERPRISE IN NATURE-BASED TOURISM



64	16	4	3
community conservancy	private conservancy	community owned lodging	other

3	2	1
null	guiding/tours /excursions	privately owned lodging

ENTERPRISE OWNERSHIP



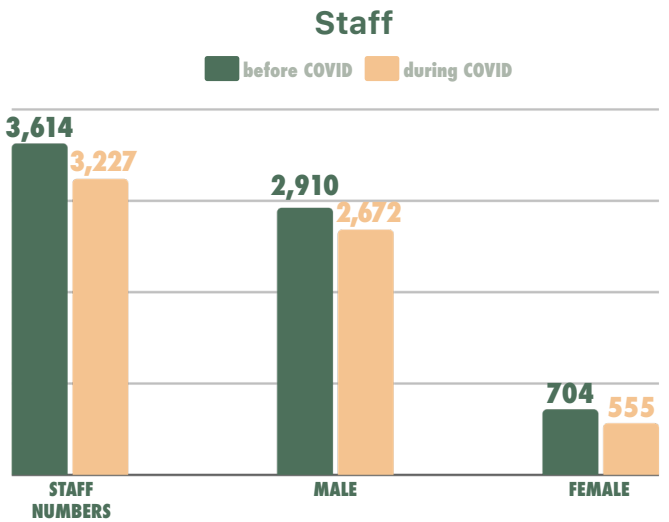
25	68
private	community

STAFFING BEFORE THE COVID-19 PANDEMIC VS. CURRENT STAFFING

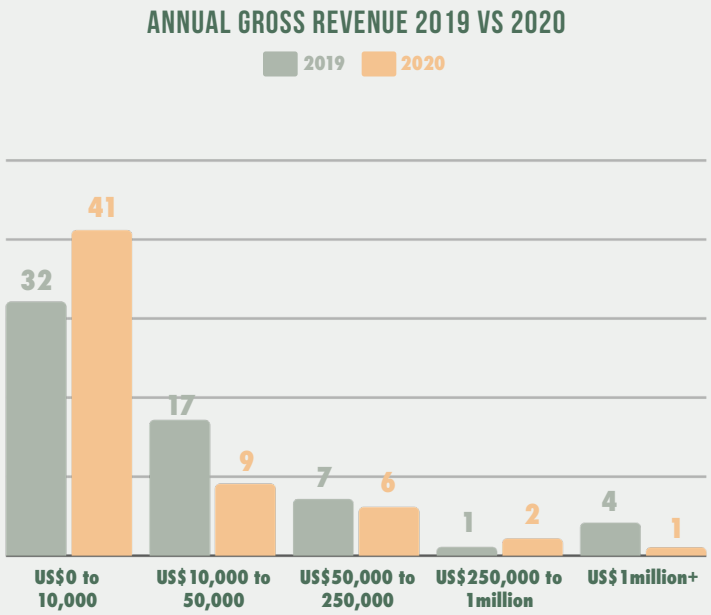
93
SURVEYED ENTERPRISES

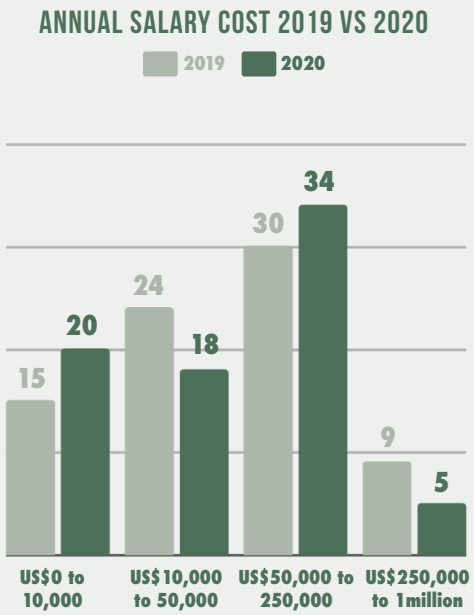
3,614
TOTAL STAFF BEFORE COVID-19

3,227
TOTAL STAFF CURRENTLY



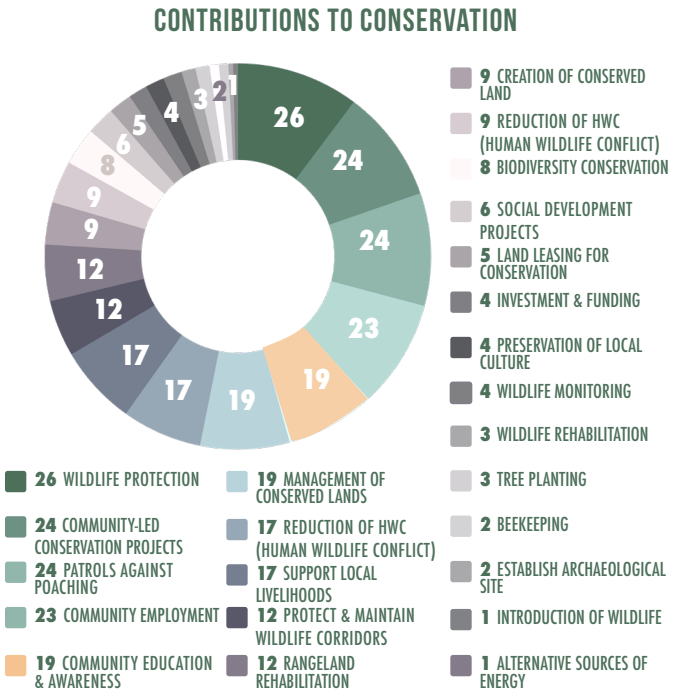
TOTAL ANNUAL GROSS REVENUE *(income from selling goods and services before any deductions)* THAT SURVEYED ENTERPRISES GENERATE FROM TOURISM





QUALITATIVE SURVEY QUESTIONS

CONTRIBUTIONS TO CONSERVATION *(the role of the community/enterprise in the management and custodianship of the land and its wildlife, including any distinguishing features about the area, its wildlife, its people and the role of tourism in its local economy)*



THE CHIEF CONTRIBUTION TO CONSERVATION, as reported by the enterprises, was the protection that they offered to wildlife. This protection comes in the form of direct protection through patrols against poaching, as well as indirect protection through community-led conservation projects and community employment. Through their support of local livelihoods, many enterprises are able to reduce human wildlife conflict and protect wildlife corridors, as well as preserve local culture. Some of the specific projects that were mentioned were bee keeping, tree planting, wildlife rehabilitation, the establishment of archaeological sites, and the introduction of alternative sources of energy.

SUPPORT THAT THE INSTITUTIONS NEED



THE TWO MOST FREQUENTLY MENTIONED areas of need were support for staff salaries, and infrastructure maintenance and development. The next most pressing area was food and water security, whether that be through the drilling of boreholes, the creation of water pans and gardens, or the supply of actual provisions for staff and community members. Additional support was also requested in the form of assistance with the development of alternative livelihoods, and the maintenance and purchase of new vehicles and other equipment. Many enterprises mentioned the impending end to government support, and the implications this has for enterprise staff and communities.

ALTERNATIVE NATURE-FRIENDLY SOURCES OF REVENUE, BEYOND TOURISM, THAT THE ENTERPRISES WOULD BE INTERESTED IN EXPLORING



THERE IS A SIGNIFICANT INTEREST IN THE EXPANSION of beekeeping, which is an important economic activity in the arid and semi-arid lands (ASALs) in Kenya (Muriuki, 2017). These lands are also ideal for livestock and livestock fodder production, and many enterprises have expressed an interest in utilizing this potential to create alternative livelihoods. Since the majority of conservancies are community conservancies with access to large swathes of land, there was also a great deal of interest in delving into agriculture, aquaculture, and other means of food production as a form of alternative income. Many enterprises also displayed a great deal of creativity in coming up with potential forms of income and savings, including getting into the carbon credit market, expanding cultural handicrafts, and using more environmentally friendly forms of energy.

ALTERNATIVE SOURCES OF REVENUE ENTERPRISES WOULD BE INTERESTED IN EXPLORING

45 BEEKEEPING & HONEY PRODUCTION	9 CULTURE & FESTIVALS	5 POULTRY PROJECTS
44 LIVESTOCK ENTERPRISE & PRODUCT VALUE CHAIN	9 LEASE, RENTAL LODGINGS	5 NON-TIMBER FOREST PRODUCT MARKETS
25 CARBON CREDITS	8 NURSERY & TREE PLANTING PROJECTS	4 WILDLIFE SECURITY & SANCTUARY
18 GRAZING, HAY & FODDER PRODUCTION	6 MINING	1 BRICK MAKING
12 CURIO & CRAFT	6 NATURE EDUCATION PROGRAMME & EVENTS	1 WILDLIFE CREDITS
11 CROP FARMING & HORTICULTURE	6 GAME & CROCODILE FARMING & HARVESTING	1 TOURISM OUTDOOR ACTIVITIES
10 FISH FARMING & MARKET	6 GREEN ENERGY	1 WATER PRESERVATION

OTHER COMMENTS

MOST ENTERPRISES REITERATED the need for general financial support. Many enterprises have not been able to pay their staff, and most expressed the desire for a COVID-19 relief fund from the government, as well as other forms of donation and investment. Enterprises also mentioned the need to be linked to long-term investors, volunteers, and even business partners, as this would assist in enterprise growth and exposure. A number of enterprises requested assistance from the government with law enforcement, marketing, and improved infrastructure in tourist sites. Many communities benefit greatly from tourism, and there is a hope that with the rehabilitation of the tourism sector more community enterprises will be recognized and developed.

References: 1. African Economic Research Consortium (AERC), 2021. Impact Assessment of COVID-19 Pandemic on the Tourism and Hospitality Industry in the EAC and Post Recovery Strategy for the Sector. Nairobi, Kenya. 2. Juma L and Khademi-Vidra A, 2019. Community-Based Tourism and Sustainable Development of Rural Regions in Kenya: Perceptions of the Citizenry. Sustainability 11(17), 4733; https://doi.org/10.3390/su11174733. 3. Muriuki J, 2017. Beekeeping technology adoption in arid and semi-arid lands of southern Kenya. African Journals Online 64(1): Special Edition 4. World Travel and Tourism Council (WTTC), 2021. Travel and Tourism economic impacts reports - Kenya.