



# **KENYA ASSOCIATION OF WOMEN IN TOURISM EVALUATION REPORT ON SURVEY OF THE EFFECTS OF COVID 19 PANDEMIC ON THE WOMEN IN THE TOURISM & HOSPITALITY SECTOR IN KENYA**

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## BACKGROUND.

According to the World Travel and Tourism Council (WTTC), travel and tourism contributed US\$8.9 trillion accounting for 10.3% of the global GDP in 2019. In terms of employment it contributed 330 million jobs, which amounts to 1 in 10 jobs around the world (**WTTC - Travel & Tourism's direct, indirect and induced impact report - 2019**)

The sector provides better opportunities for women's participation in the workforce, women's entrepreneurship, and women's leadership than other sectors of the economy. According to the **UNWTO 2<sup>nd</sup> Edition Global Report on Women in Tourism – 2019**, 54% of people employed in the Tourism industry are women compared to 39% of women employed in the broader economy.

The tourism and hospitality industry has unique characteristics which may provide a rationale as to why, the sector has more women representation. Some of which include:

- i. Less emphasis on formal education and training;
- ii. Greater emphasis on personal and hospitality skills;
- iii. Higher prevalence of part-time and work-from-home options;
- iv. Increased options for entrepreneurship that do not require heavy start-up financing; and
- v. Opportunities through the sharing economy for women through online platforms, such as Airbnb, Uber, and Vacation Rentals by Owner (VRBO).

Although women make a significant contribution to growth of the industry and general growth of the economy in the country, they are faced with a myriad of challenges that hinder their entrepreneurial advancement, such as;

- Inequality in a perceived male dominated environment,
- Limited or no access to collateral financing to start or scale the business,
- Divergence between women's qualifications/capacity and work place responsibilities,
- High degree of gender role stereotyping with women often concentrated in lower paid, clerical and cleaning jobs.

Other challenges, that women have to grapple with include, struggling to balance all the aspects of the life of homemaker who owns a business, general pressures in the workplace and that there are fewer women in decision making roles in tourism than men even though they make up the majority of the labour force in the industry.

## OBJECTIVE/PURPOSE OF STUDY

As the world continues to struggle with the spread and effects of the Covid 19 pandemic on healthcare and economic systems, the Tourism and Hospitality industry is one of the hardest hit sectors. WTTC projects an unprecedented tourism job losses of **100.8 million** a drop of **31%** and **2.7 trillion USD** a drop of **30%** in Tourism & Travel GDP (**WTTC Report on Economic Impact from Covid 19 - 2020**). In Kenya the effects of the pandemic have been immediate and will have far reaching consequences for the entrepreneurs, employees, investors/stakeholders and in deed the overall Kenyan economy.

Kenya Association of Women in Tourism (KAWT) carried out a survey to establish the effects of Covid-19 pandemic on women in tourism and hospitality as well as explore appropriate mitigation and intervention measures by the Government and Development Partners.

The survey was designed to determine the effects of the pandemic on the women both on the individual and business level.

Areas that are covered in this study include:

- Tourism Sub – Sector and County Distribution
- Actions taken by the businesses in response to Covid 19 pandemic
- Type of Employees in the organization – Permanent, Part time and Seasonal.
- Proportion of Women in the business
- How the respondents spend their income - profit
- Effects of COVID-19 on household expenditure
- The most impactful KAWT intervention Amid and Post Covid 19
- Government and Development Partner Intervention that would improve Business Amid & Post Covid-19

The outcome of the survey is intended to compliment the ongoing Government and Development Partner efforts to grasp the effects and implement proposed short, Mid and long-term mitigation measures.

The KAWT evaluation report sheds light on current challenges and effects of the pandemic and the most immediate needs of the women in tourism and the wider community.

## SURVEY METHODOLOGY.

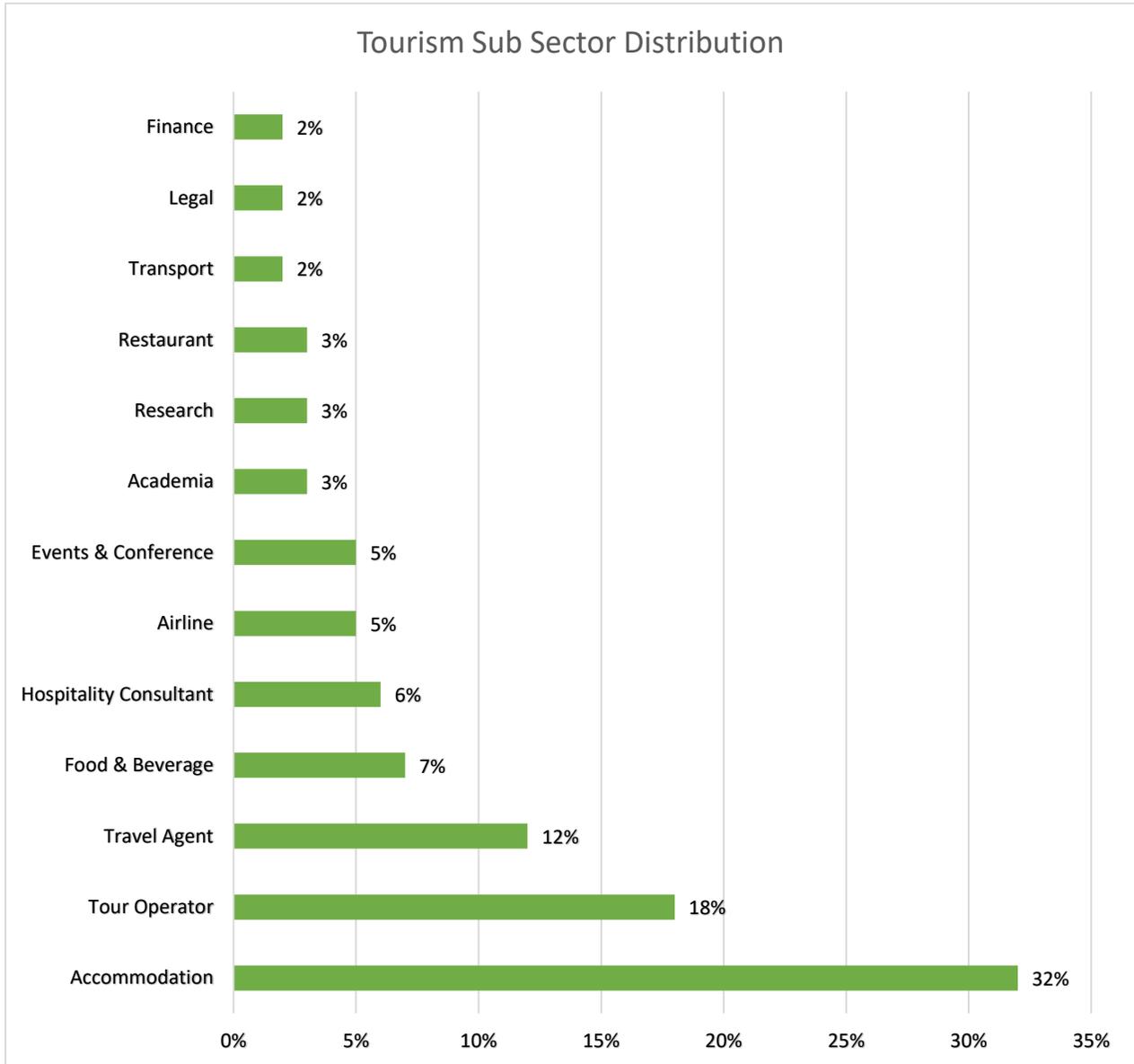
The survey sample size was 178 women in tourism across 14 sub sectors. The study adopted purposive sampling for sub sectors to ensure representation and random sampling in each sub sector.

The respondents were drawn from the KAWT membership, Members of Community Based Tourism Organizations (CBTO's), Non KAWT members and members from other Tourism Sector Bodies. Data collection method used was; online survey distribution.

**The survey was conducted between 26<sup>th</sup> April to 10<sup>th</sup> May 2020.**

# SURVEY RESULT

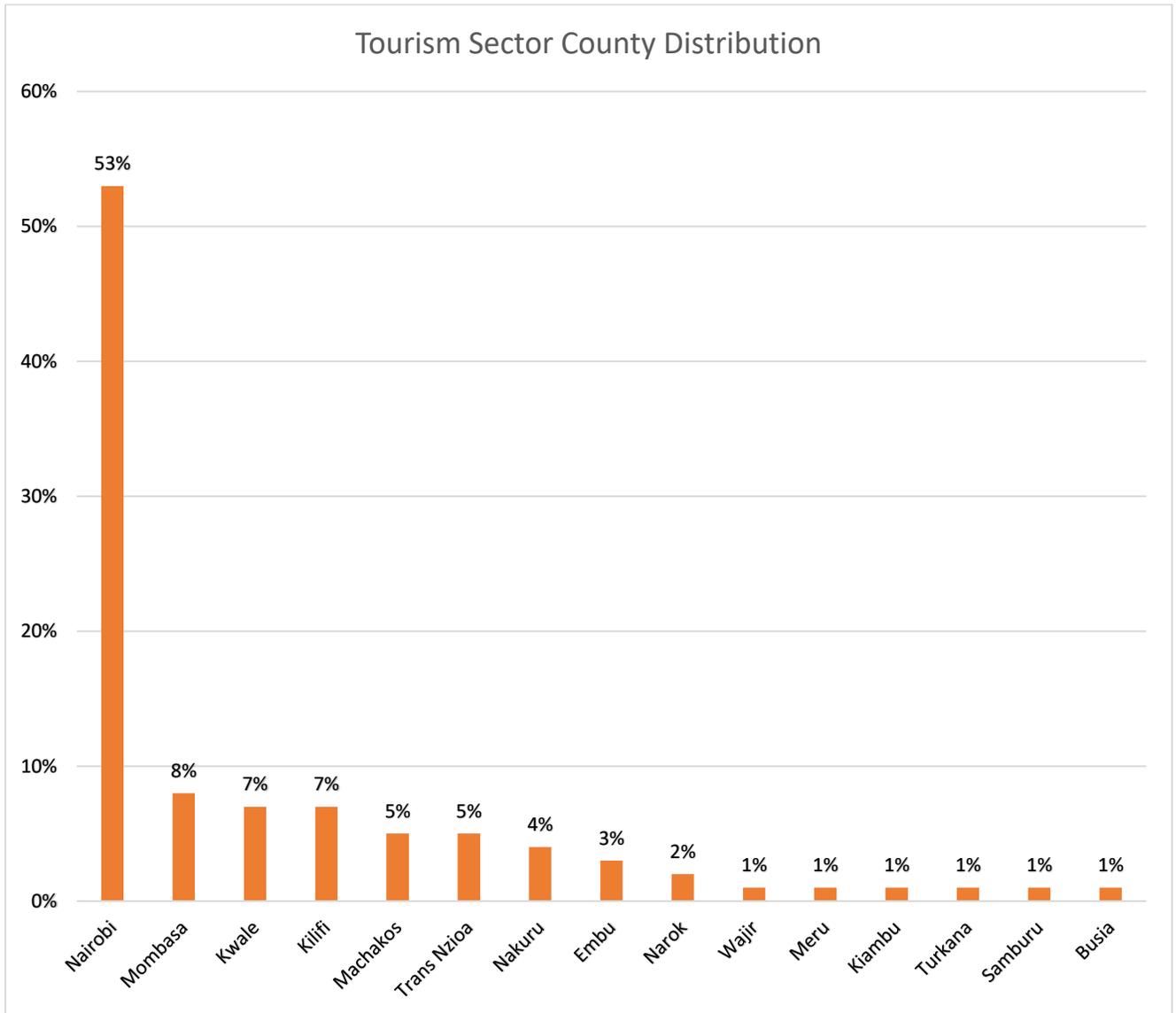
## 1. WHICH TOURISM SUB SECTOR DO YOU BELONG TO?



**Fig: 1**

The findings indicated that most of the respondents were from the Accommodation sub sector at **32 %**, followed by Tour operators and Travel agents at **18%** and **12 %** respectively. Legal, finance and transport had the lowest percentage at **2%**.

## 2. IN WHICH COUNTY DO YOU OPERATE FROM?



**Fig. 2**

The Tourism sector county distribution indicated that **53%** of the respondents were from Nairobi county, followed by Mombasa County with **8%**.

The counties with the lowest respondents were Wajir, Kiambu, Turkana, Samburu and Busia at **1%**.

### 3. WHAT ACTIONS DID YOUR BUSINESS TAKE IN RESPONSE TO THE COVID 19 PANDEMIC?

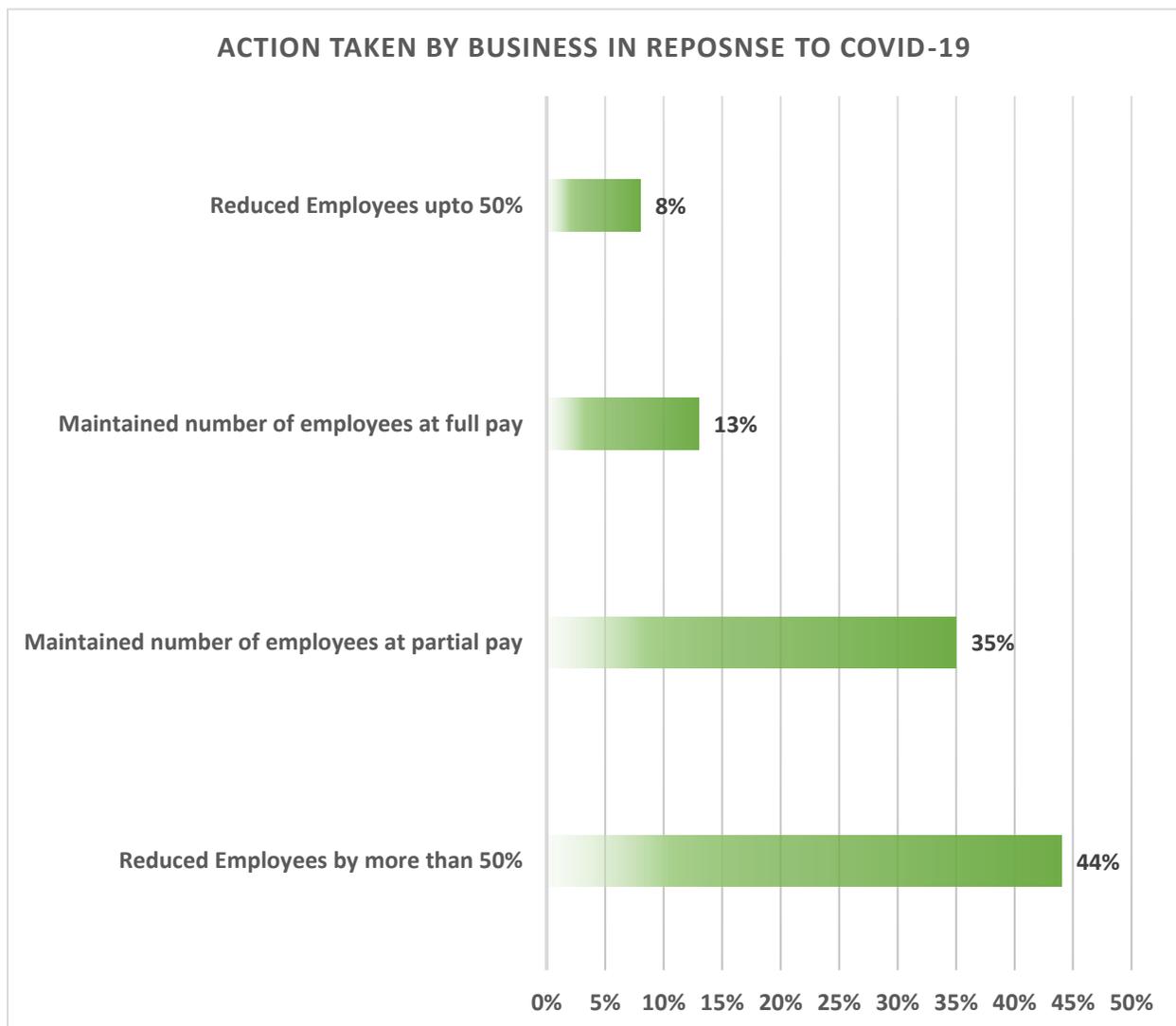


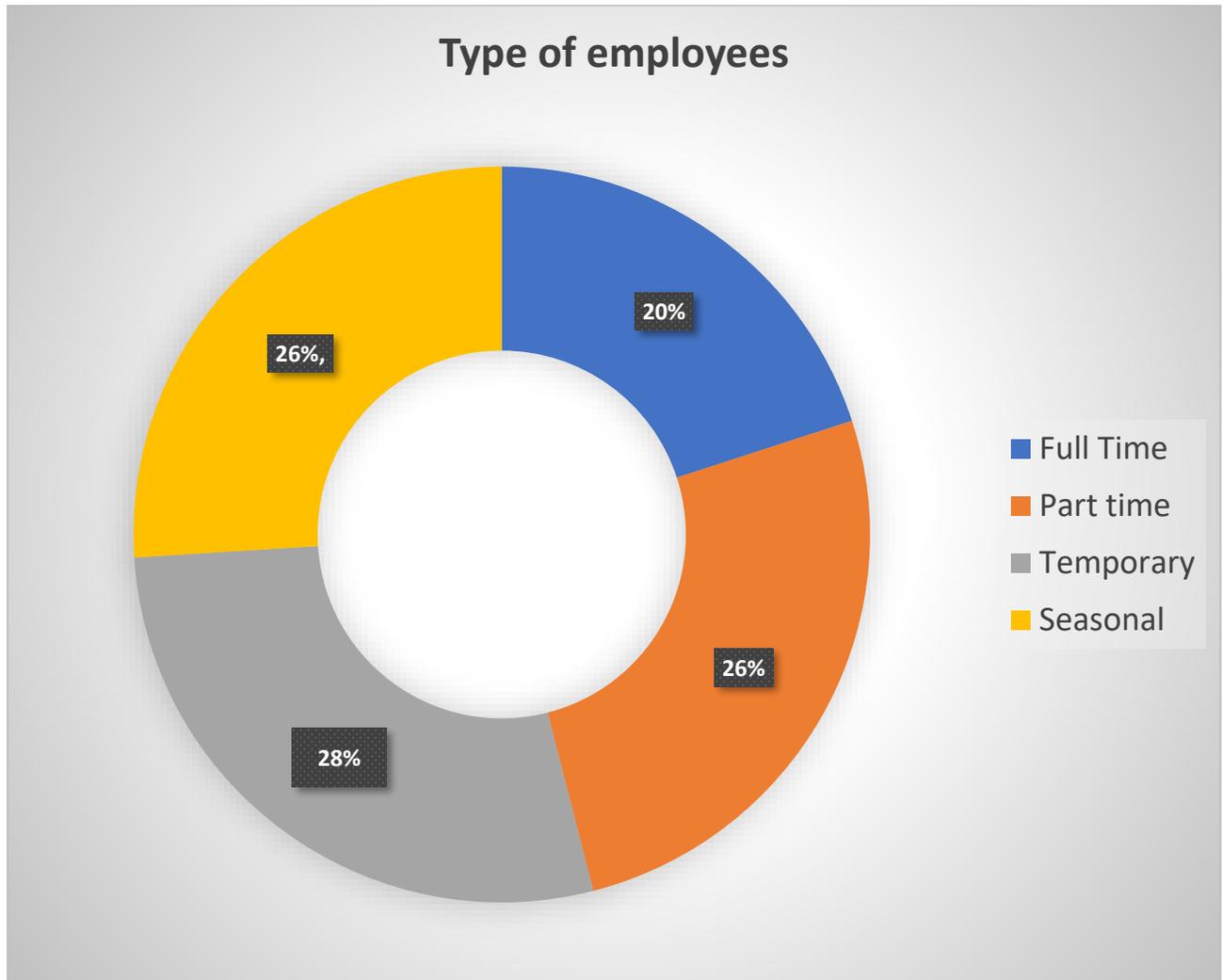
Fig. 3

On action taken by business response to covid-19, the study indicates as follows;

- 44% of the businesses reduced their employees by more than fifty percent,
- 35% maintained number of employees with partial pay,
- 13% maintained number of employees with full pay,
- 8% reduced number of employees up to fifty percent.

This figure's point to significant number of jobs loses and reduced income for a majority of the respondents.

#### 4. TYPE OF EMPLOYEES IN YOUR BUSINESS

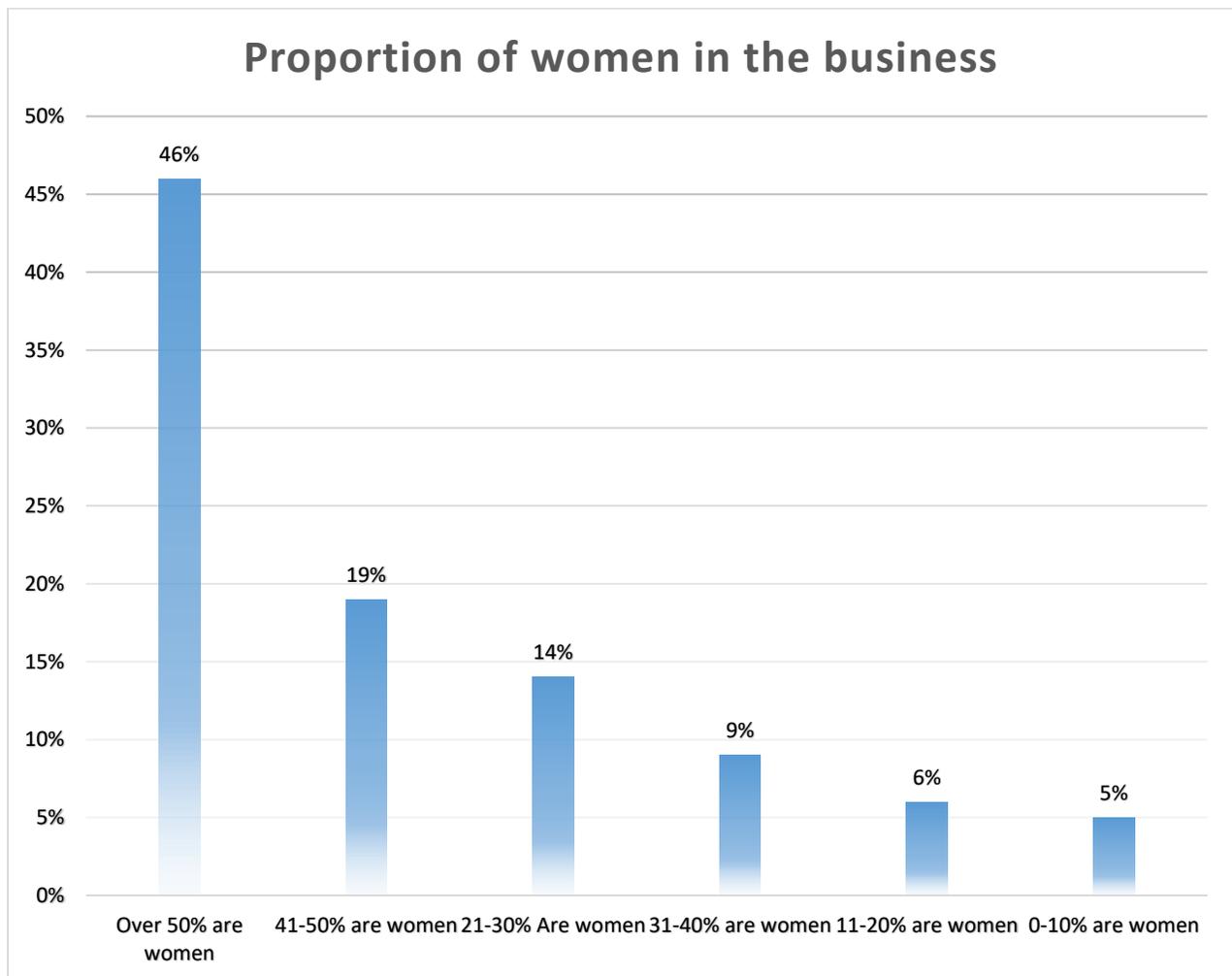


**Fig. 4**

The report indicates a higher percentage of employees on contractual basis and only 20% on full time employment;

- 20% Full time employees
- 26% Seasonal
- 28% Temporary
- 26% Part time

## 5. WHAT IS THE PROPORTION OF WOMEN IN YOUR BUSINESS?



**Fig. 5**

- **46%** of the enterprises/organizations in the study indicated that they had over **50%** women in the workforce

- **19%** of organizations have between **41-50%** in the business.

- Only **5%** percent of the organizations had **0-10%** women in the workforce.

(This finding corresponds with the **UNWTO 2<sup>nd</sup> Edition Global Report on Women in Tourism - 2019** that indicates that **54%** of people employed in the Tourism industry are women).

6. HOW DO YOU SPEND YOUR INCOME – PROFIT?

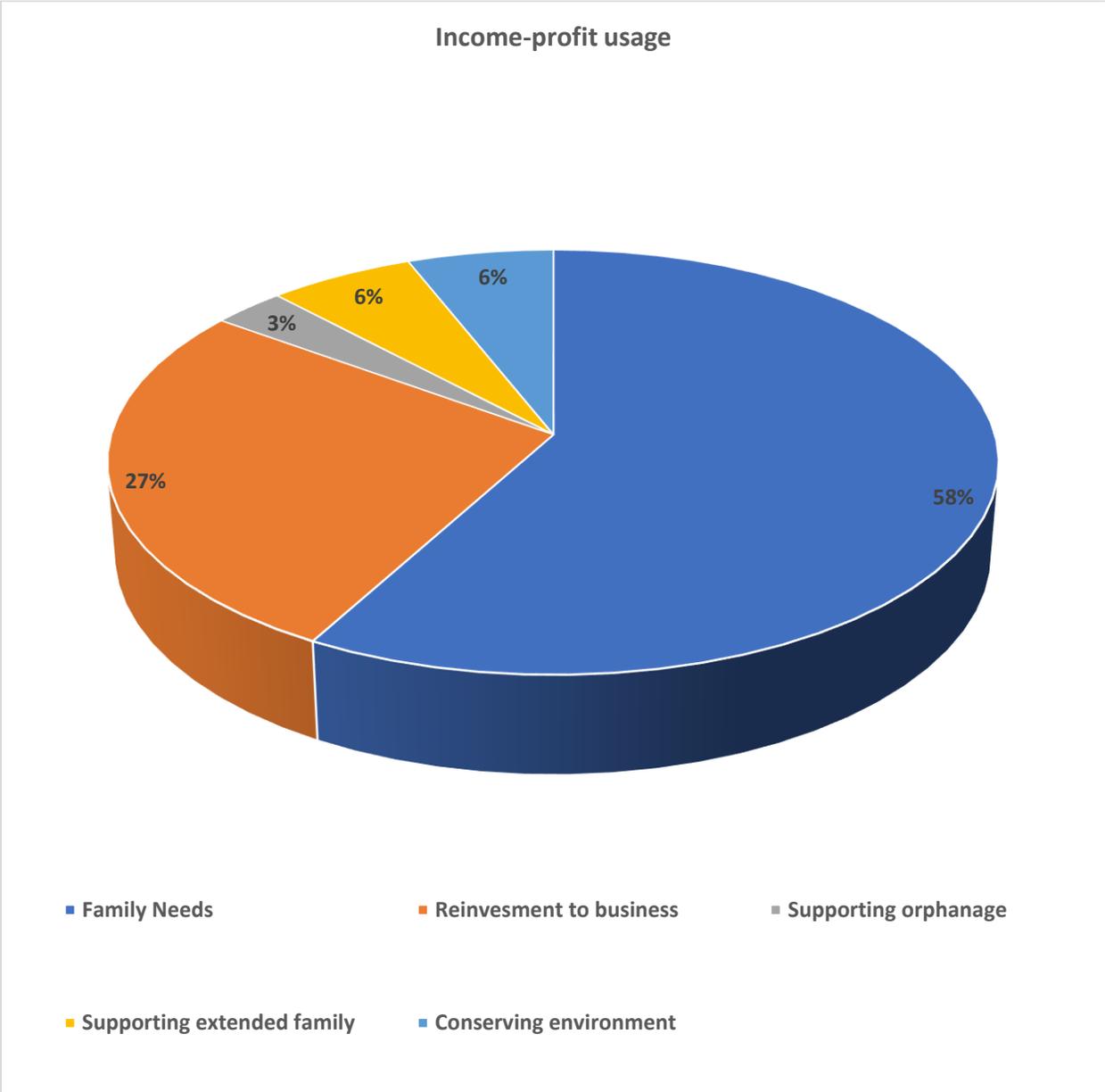
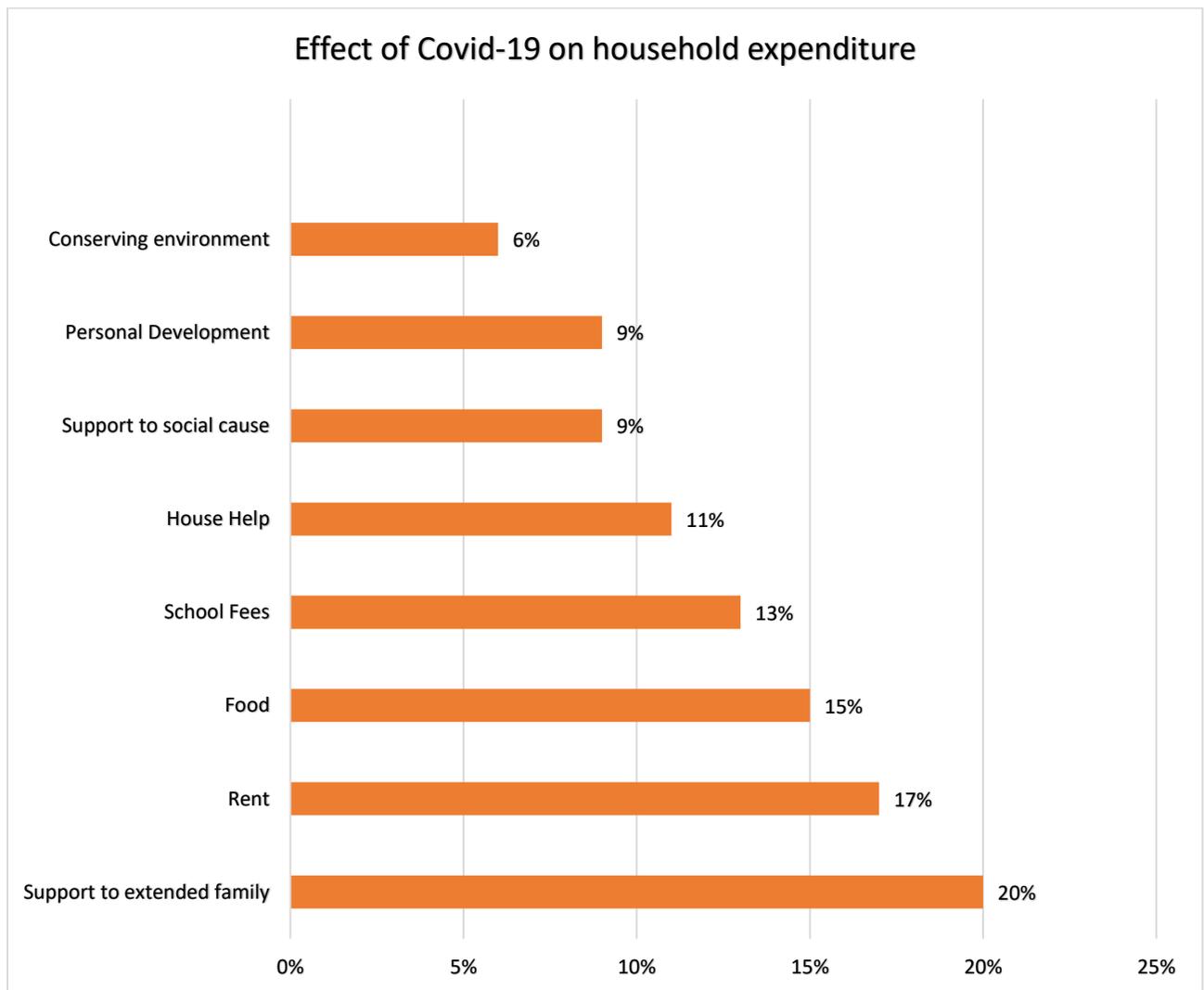


Fig. 6

On Income- profit usage,

- Majority of the respondents (58%) spend their income on family needs,
- 27% reinvest into their business.
- 3% Conserving the environment – the priority of most respondents has shifted more to issues related to personal upkeep as environmental conservation has been hampered by the lock down and social distancing campaigns aimed at flattening the Covid 19 curve.

## 7. WHAT IS THE EFFECT OF COVID 19 ON YOUR HOUSEHOLD EXPENDITURE?



**Fig. 7**

The effects of Covid-19 on household expenditure show that;

- Support to extended family was **20%**,
- Rent **17%**,
- Food **15%**
- Other external factors like social and environmental activities accounting for less than **10%** each.

8. WHAT BUSINESS OPERATION ACTIONS HAVE YOU TAKEN AS A RESULT OF COVID 19?

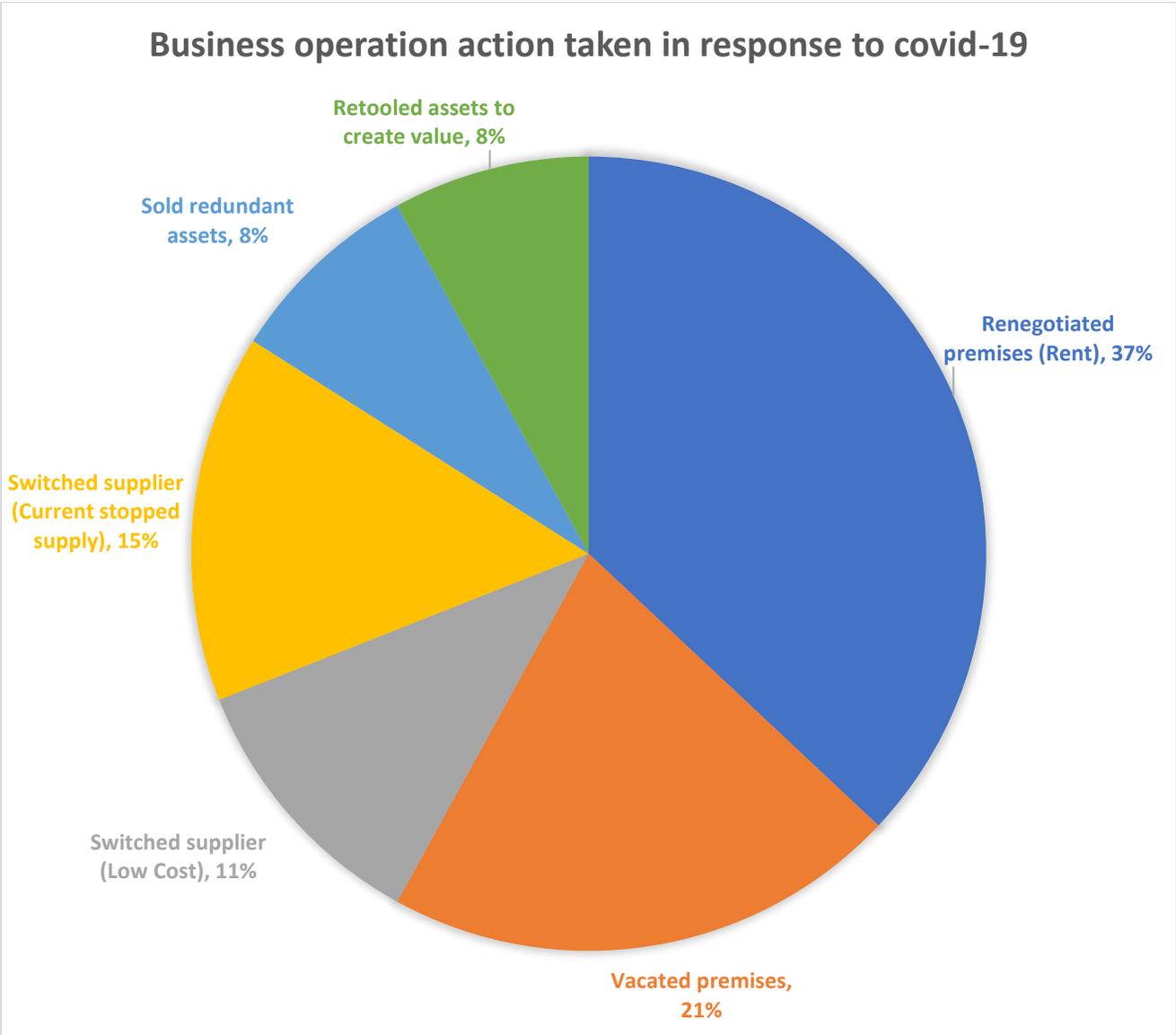


Fig. 8

The respondents indicated that;

- 37%, renegotiated rent in the work premises,
- 21% Vacated premises,
- 15% switched premises for cheaper rents
- And 8% either retooled or sold their assets.

9. WHAT KAWT INTERVENTION WOULD HAVE MOST IMPACT FOR YOU AMID & POST COVID 19?

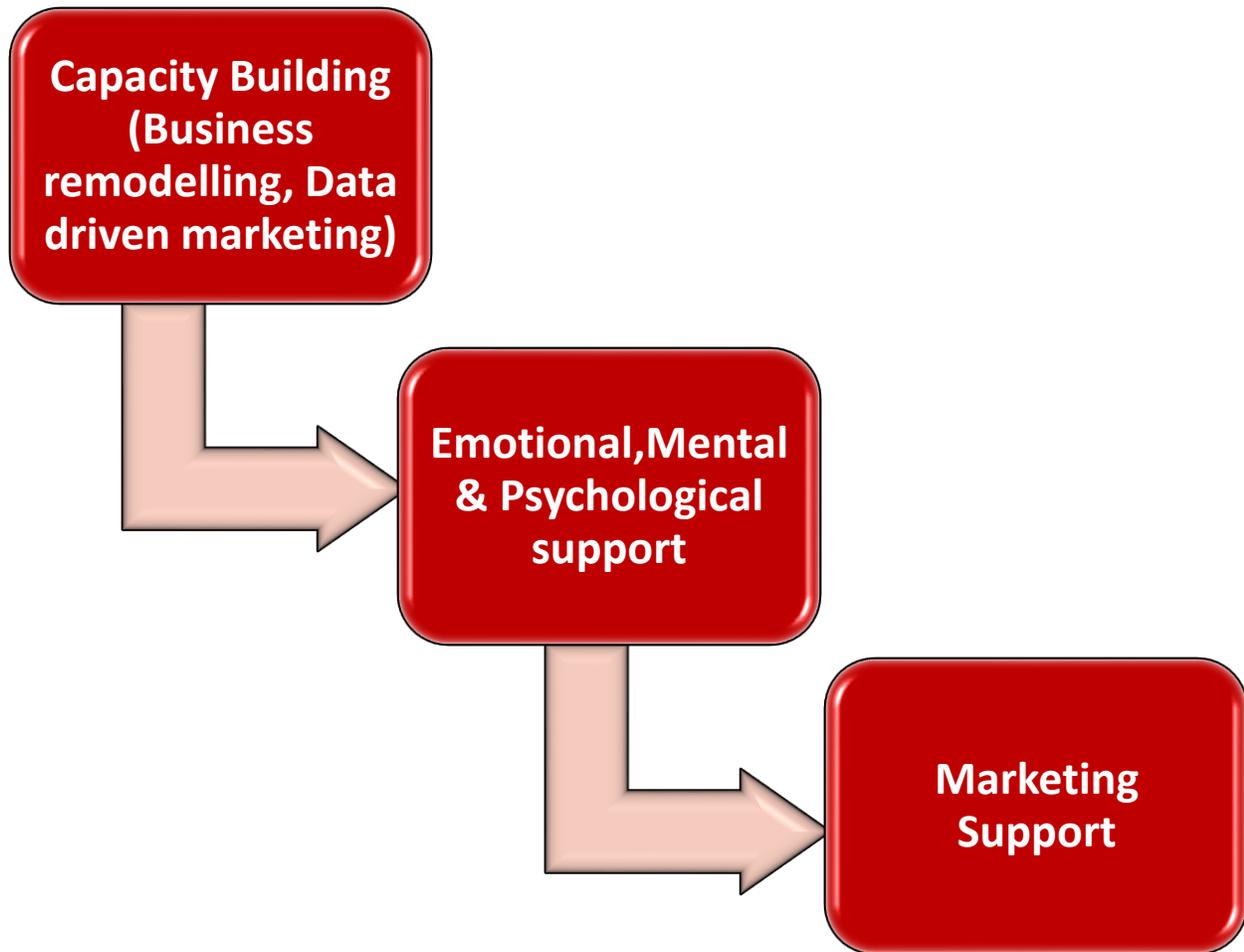
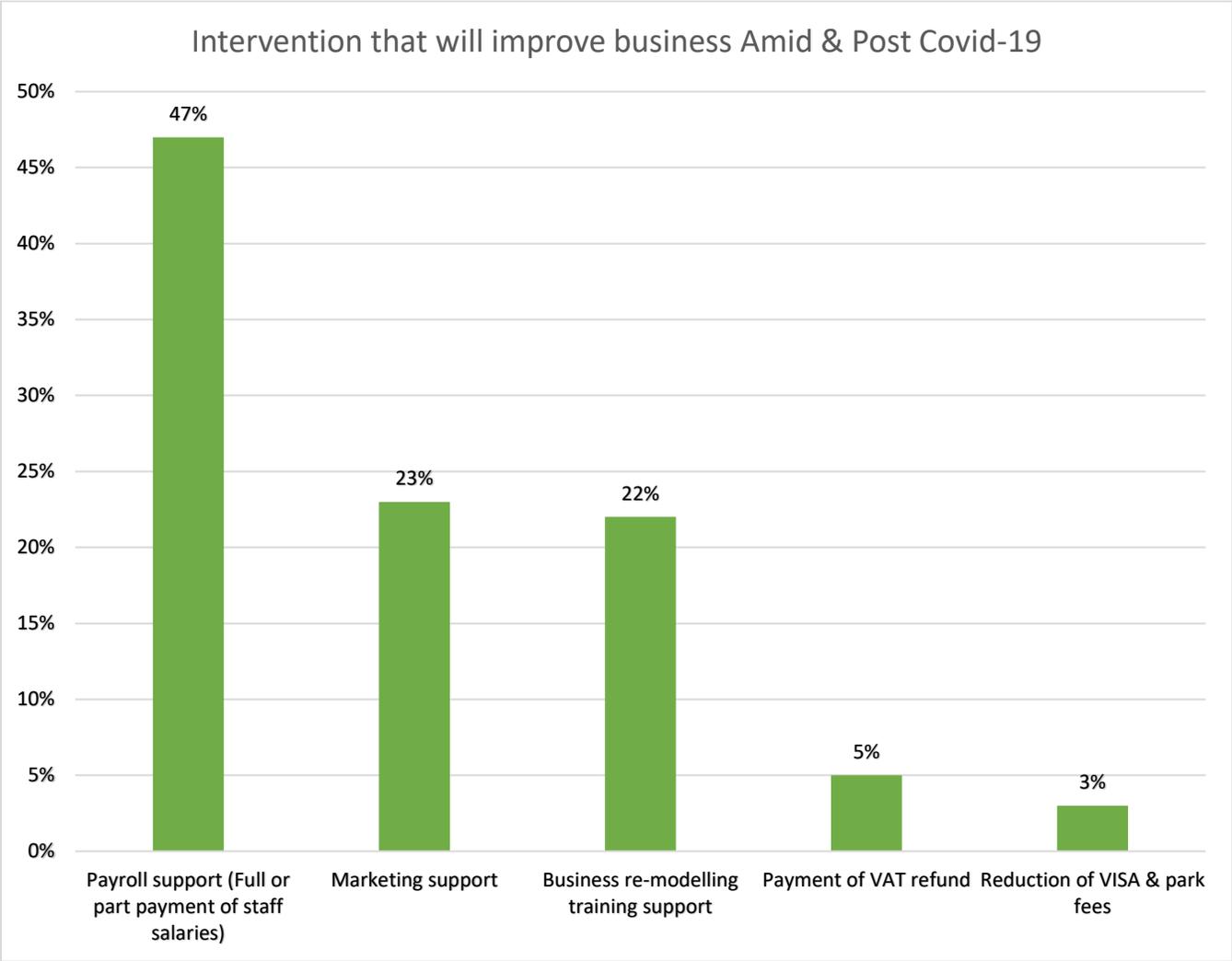


Fig. 9

Majority of the respondents wanted the Association to facilitate capacity building through training, data driven marketing and business remodeling, including emotional mental and psychological support both during and post Covid.

**10. WHAT DEVELOPMENT PARTNER INTERVENTIONS WOULD IMPROVE YOUR BUSINESS AMID & POST COVID?**



**Fig. 10**

Most of the respondents indicated that the interventions that would improve business amid and post covid-19 were Payroll support at **47%**, marketing support **23 %** and business re-modelling support at **22%**.

The payment of VAT refund and reduction of VISA and Park fees were ranked at **5%** and **3 %** respectively.

## CONCLUSIONS.

From the findings, it can be concluded that majority of the women in the tourism and hospitality industry are involved in businesses and activities in the accommodation, tours and travel sectors. In addition, most of them are based in Nairobi county which is the capital city and main business hub.

The Covid-19 pandemic has had a huge negative socio-economic impact on the tourism industry resulting in job losses, business closures, salary pay cuts and loss of incomes for most households. The business closures have impacted part time and seasonal staff with some being relieved of their duties and others going home with half pay and unpaid leave.

The findings also indicate that the majority of the workforce in the tourism industry comprises of women. This is an indication that the industry that was once male dominated has had a change for the better because of the perception that women work better. Emerging industry trends also indicate that the sector is now dominated by women, particularly in the front line and operational areas.

The study further indicates a shift in the buying behavior with most of the respondents spending more of their household incomes on consumption goods and supporting extended family. This is an indication of the economic impact of covid-19 on the livelihoods of the communities who depend on the people who work in the tourism sector.

The report further indicates a reduction in other socio – economic activities like local and community interactions, environmental conservation and other CSR activities. While this have in the past formed an integral part of most of the respondent’s community consciousness and socialization, the lock down and social distancing effects of Covid 19 have curtailed these activities enormously.

Due to the unparalleled and unprecedented impact on the economy, the main interventions that will improve business amid and post covid-19 will be payroll support for most organizations to help them offset payroll costs during this time of little or no activity due to the restrictions, curfews and lockdowns.

In addition, the businesses/organizations require a boost in terms of marketing support to enable them revive/ jumpstart their businesses again once the restrictions ease. There will also be need for emotional, psychological and mental support to help women overcome the fear, mental anguish and depression that some may find themselves in during this time of Covid-19 pandemic.

Overall, the report indicates not only a huge negative impact on the women in tourism but to the families and the wider community as women generally tend to be the caregivers and any impact on their livelihood is felt on a wider scale thus the need for urgent and decisive intervention measures.

## RECOMMENDATIONS;

Following the above findings and conclusions, Kenya Association of Women in Tourism (KAWT), desires to partner with stakeholders and other strategic partners to achieve the following short, mid and long-term mitigation measures for our members and the entire population of women in the tourism and hospitality sector around the country.

1) **Attainment of the Tourism Sustainable Development Goals (SDG's)** – The pandemic gives rise to a very unique opportunity for the Government to partner with the Association and other strategic partners to collaborate in a more engaged a meaningful way to restart and reimage the sector to achieve and reboot the attainment of the Tourism SDG's.

2. **Environmental Conservation & Sustainability** – KAWT continues to be passionate about environmental conservation and sustainable tourism trends and practices. Government support in upscaling our conservation initiatives, while incorporating the Association in all upcoming and ongoing government environmental programs, initiatives and trainings. Would create a win – win situation.

2) **Data Driven Survey** – The Association would like to partner with the Ministry of Tourism and Development partners to undertake a Gender aggregated survey to determine the actual percentage of women in the tourism and hospitality sector per county and in the entire country, gender job cadre distribution, do a skills assessment to determine the training needs required to upskill and reskill the women based on the new industry trends emerging as part of the impact of the pandemic and other related data.

The data derived from this study will give the Government a framework of achieving **SDG 5** on gender equality, by ensuring gender parity in job distribution and a bridging of the pay gap.

3) **Government and Development Partner Support of Women's Tourism Networks, Associations and Community Based Organizations actively working towards women's empowerment in the sector.** The support in terms of financial grants and aid will assist the organizations achieve financial stability and assist the Government in disbursing our proposed revolving funds kitty to assist women in quick economic recovery and stability.

4) **Incorporation of KAWT in the Post Covid 19 Recovery Committees** – Value would be gained by having KAWT representation in the National Tourism and Hospitality Recovery stimulus program and all activities aimed at stabilizing the sector both at the county and national levels, and in preparation of strategies to cushion against occurrence of a similar nature in the future. The Association not only provides a pool of credible professional women but our presence in the counties would facilitate and strengthen the gender related agenda

5) **Investment in Capacity Building, Business Remodeling and Digital Marketing Training** - The women in tourism and our value chains would benefit from Government support in these aspects. This would also improve their entrepreneurial and job advancement opportunities, thus enabling meaningful involvement and participation of women in the industry.

## REFERENCES



Fig 11

UNWTO – Tourism Sustainable Development Goals (SDG’s) – Fig 11

WTTC - Travel & Tourism’s Direct, Indirect and Induced Impact Report - 2019,

UNWTO - 2<sup>nd</sup> Edition Global Report on Women and Tourism 2019

WTTC - Report on Economic Impact from Covid 19 - 2020



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