

PREPARED BY VIFFA CONSULT

A sunset over a savanna landscape. The sun is low on the horizon, casting a warm orange glow. In the foreground, two people are sitting at a table covered with a red and white checkered tablecloth. The table is set with various bottles of drinks and a bowl of food. The background shows a vast, open savanna with scattered trees and a herd of animals grazing in the distance.

# Kenya's Tourism<sub>2021</sub>

Wishes of Local Tourist



# Kenya's Tourism<sup>2021</sup>

Wishes of Local Tourist

Tourism is an important sector in the Kenyan economy. Current performance drivers of the sector are measured using international visitor arrivals as well as international conferences held.

The tourism sector has borne the biggest brunt due to the negative effects of COVID 19 especially due depressed numbers of international visitor arrivals as well as international conferences.

Although it's very important to focus on selling Kenya to the international market as a tourist destination and rightly so due the sector's importance to Kenya being a major economic pillar under Vision 2030 and contributing 10 percent to GDP, similar efforts must be made to sell the same to Kenyan citizen residing in Kenya to:

- 1-Manage risk of over reliance on traditional western markets
- 2-Generate extra income
- 3-Foster sense of ownership hence mainstream conservation of natural resources

The recovery and growth of the sector is critical to SMEs operating in the sector such as tour operators, owners of facilities among others as well as SMEs linked through backward and forward value chain linkages.

Viffa conducted its second edition exploratory survey to establish the demography, taste and preferences of local tourist with the aim of providing market intelligence to SMEs operating directly in the sector as well as SMEs linked both forward and backward to the sector. The objectives of the survey are;

- 1-Establish demography of local tourist
- 2-Establish travel patterns of local tourist
- 3-Establish income levels of local tourist

## Study Methodology

  
Study tool

  
Online & Telephone Survey

Sample Size

127

Sample Design

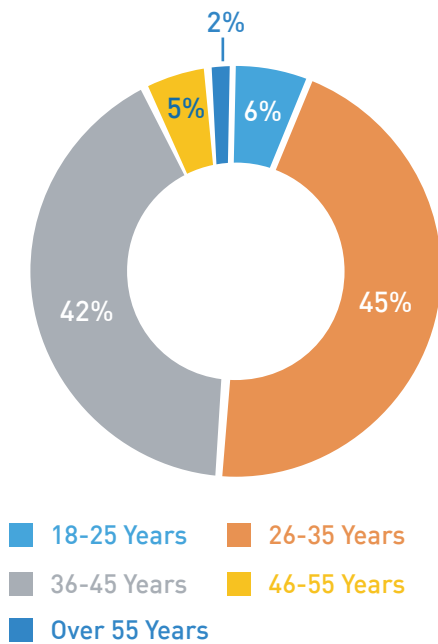
Purposive {Counties; Nairobi, Kajiado, Machakos, Kiambu, Kisumu, Mombasa, Nakuru}  
Random {Within counties}

# Contents

Study Methodology.....	2
Results.....	4
Age Distribution.....	4
Purpose of Travel.....	4
Consideration when selecting place to travel to in Kenya.....	5
Consideration for selecting a specific destination.....	6
Destination discovery sources.....	6
Preferred means of transport to travel destination.....	7
Annual travel budget to preferred destination.....	7
Frequency of travel to preferred destination.....	8
Preferred Attraction.....	8
Preferred Accommodation Type.....	9
Action to promote local tourism in 2021.....	9
General Sentiments.....	9

# Results

## Age Distribution



## Insight

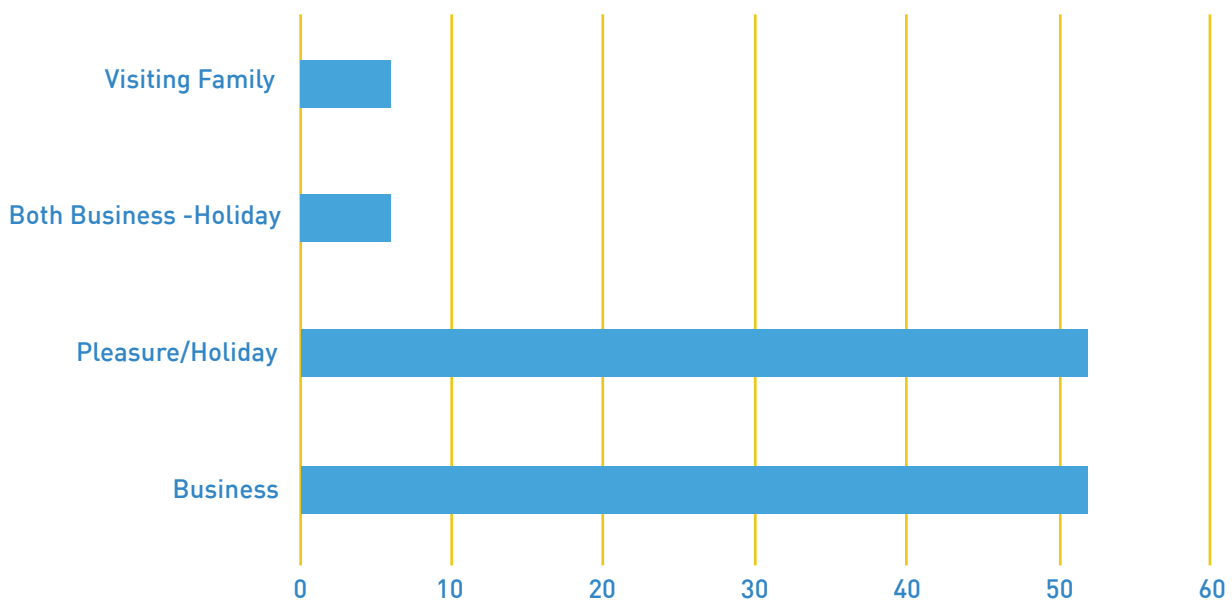
### Comparison of age distribution between local and foreign tourist

87 percent of local tourist in Kenya are between age of 26-45 Years while foreign tourist (1st Quarter 2019 according to Tourism Research Institute quarterly sector performance in similar age bracket was 67 percent.

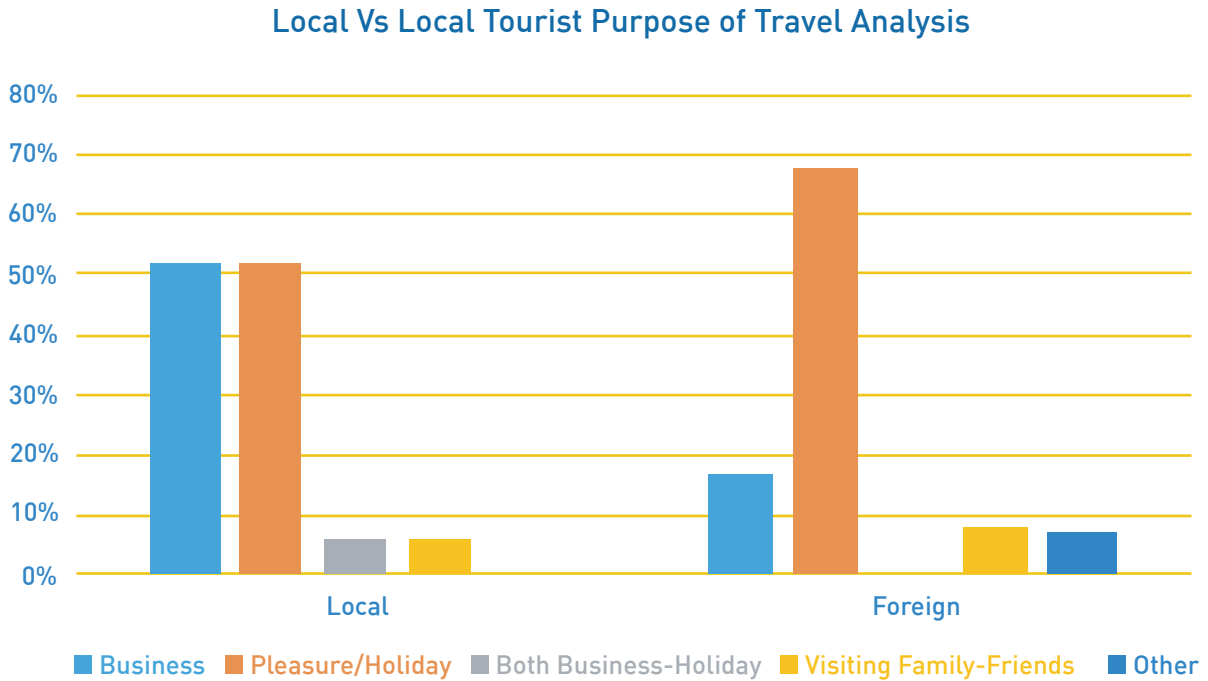
Similarly, local tourist of over age 50 years constituted 7 percent of tourist while foreign tourist for the same age bracket was 20 percent.

Based on the emerging youthful demographics of local tourist; relevant outreach efforts must be made by sector players by understanding their customer journey or through a customer empathy map analysis

# Purpose of Travel



## Purpose of Travel comparison between local and foreign tourist

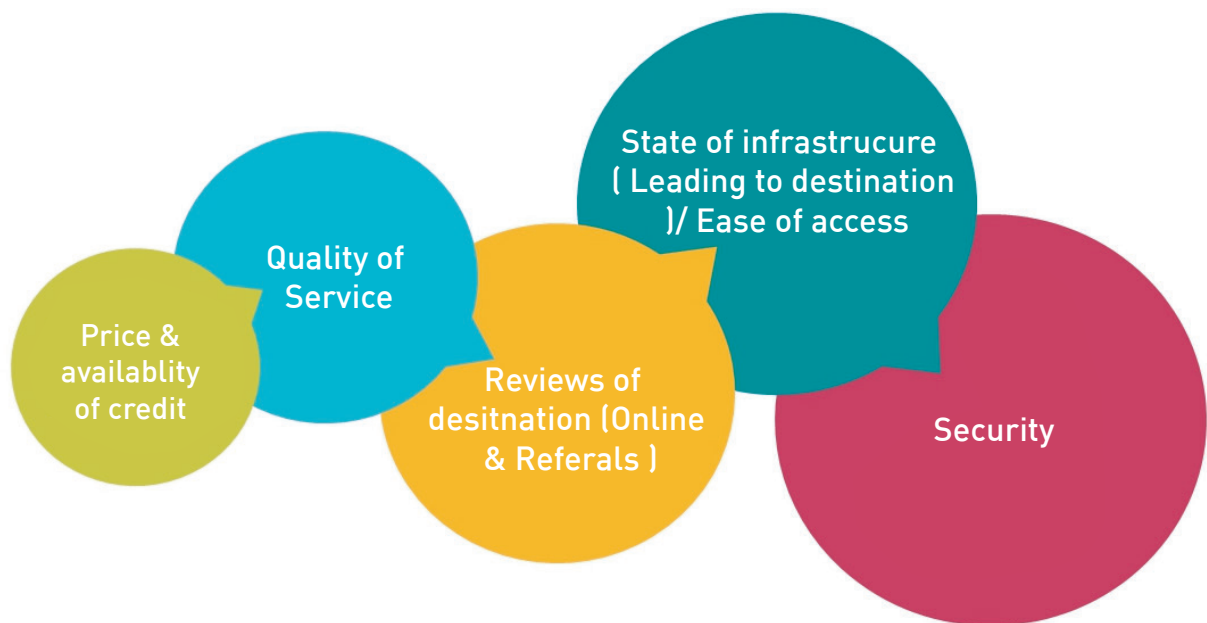


Source: Foreign Travel Data | Tourism Research Institute | Quarterly Tourism Performance Report 2019 Q1

## Consideration when selecting place to travel to in Kenya



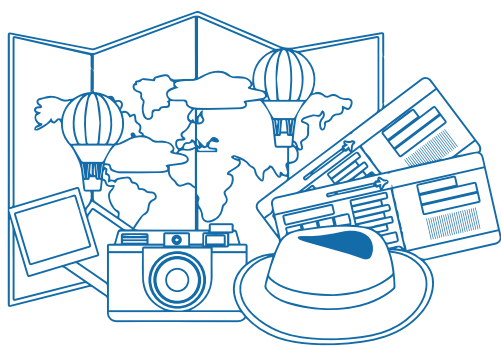
# Consideration for selecting a specific destination



## Destination discovery sources

- 1 Referral from Family & Friends
- 2 Destination Website & Social media
- 3 Government Agency websites & social media pages (e.g Kenya Tourism Board-Magical Kenya)
- 4 Social media influencers
- 5 Advertisement on mainstream media (TV-Radio)
- 6 Online Research

# Preferred means of transport to travel destination



Boat



Plane



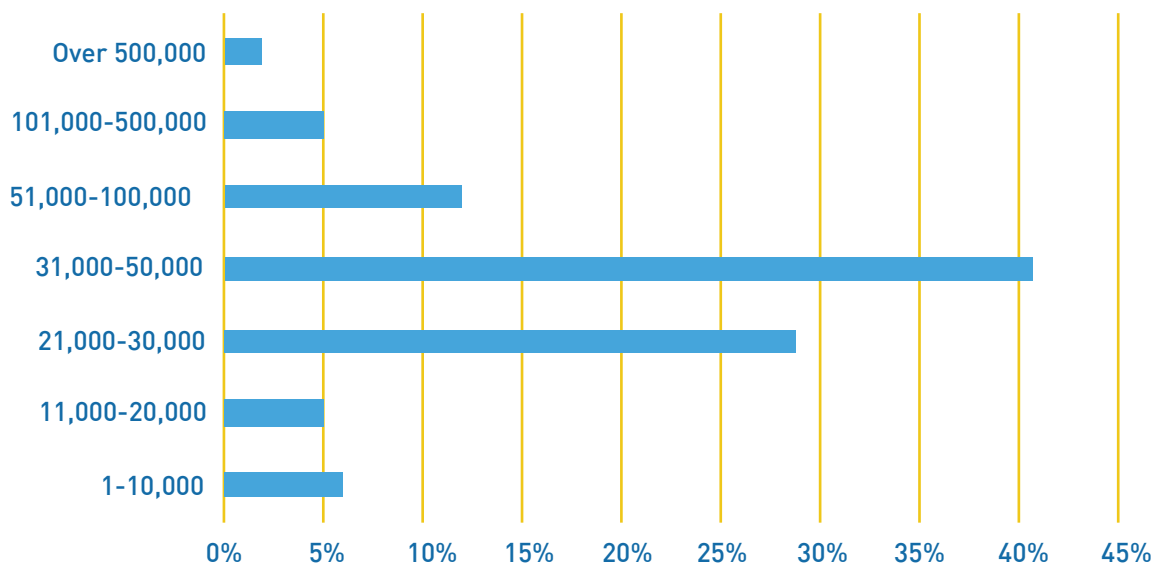
Train



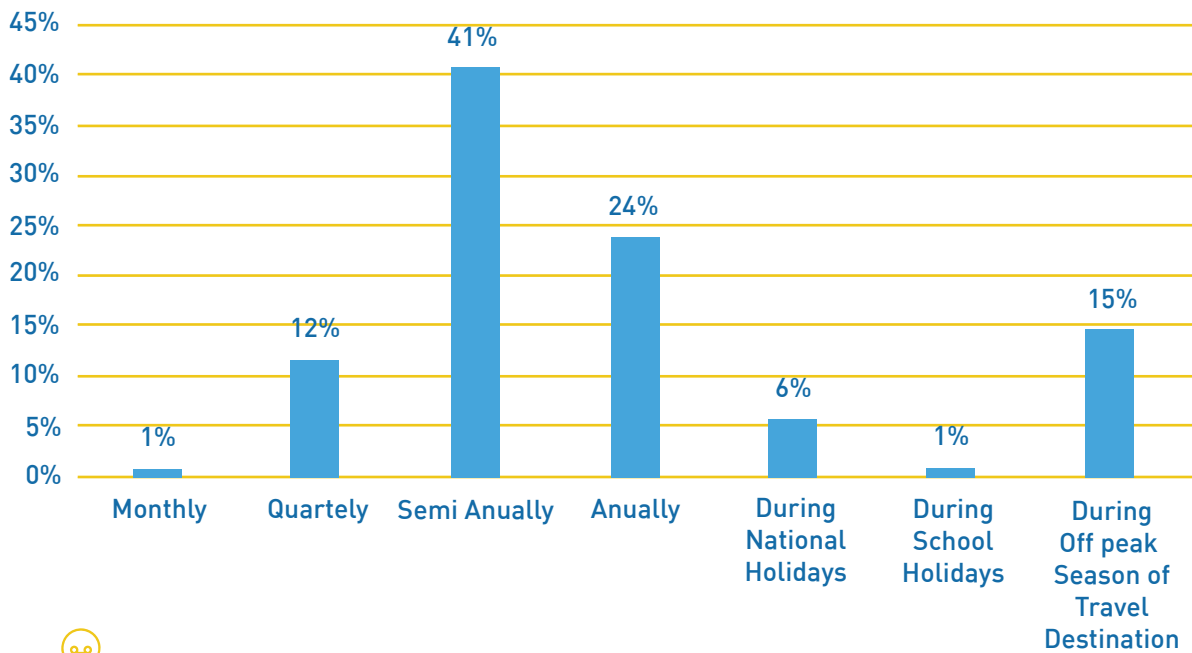
M. Vehicle  
(Public &  
Private)



# Annual travel budget to preferred destination(Ksh)



# Frequency of travel to preferred destination



## Insight

Respondents who travelled both monthly and quarterly were mostly involved in business travel

15 percent of respondents indicated an affinity to take advantage of off peak season in most destinations which is correlated with low foreign tourist inflow so as to take advantage of low prices

## Preferred Attraction



Coastal Beaches



Game Park



Rural Home



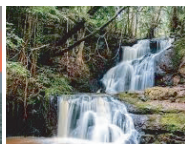
Natural Forest



Heritage Sites



Lakes and other water bodies in Kenya



Serene Environment



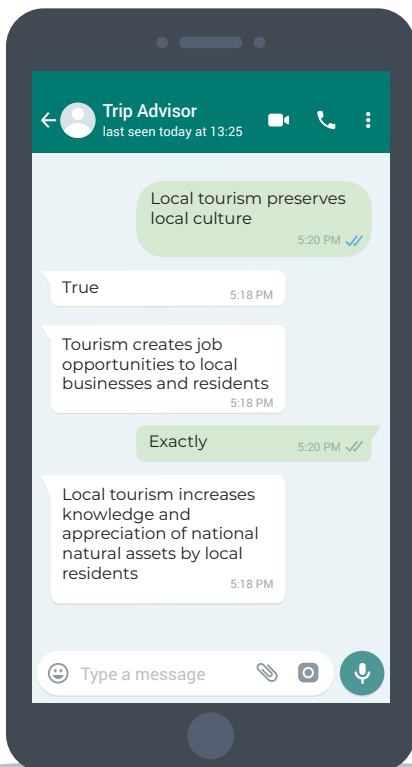
# Preferred Accommodation Type



## Action to promote local tourism in 2021

- 1 Lower Prices of destination for Local Kenyans
- 2 Targeted promotion about available destination to local Kenyans
- 3 Ease access to destination through bundled offers (Accommodation & travel inclusive)

## General Sentiments



Viffa Consult  
One Padmore Place  
George Padmore Road  
P.O.Box 35320-00200  
Tel No 0723982528