



Viffa Consult
Unlocking Africa's Entrepreneurship Spirit



Kenya's Tourism Sector 2022

Wishes of Local Tourist

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Introduction

Kenya's economy is reported to have expanded by 7.5 percent in 2021 (Economic Survey 2022) following reopening of the economy and underpinned on positive performance of ; Manufacturing, Wholesale and Retail Trade , Real Estate , Transportation and Storage, Financial and insurance activities .

The tourism sector performed relatively well (table 1) buoyed by reopening of Kenya's source markets, relaxation of travel restrictions and the rising rates of COVID-19 vaccination

Table 1 : Kenya Tourism sector performance

Parameter	Performance (2021 vs 2020)
International arrivals	50.3% increase
Hotel Bed night occupancy	49.2% increase
International conferences	90% increase
Local conferences	86% increase
National Park and game reserves visits	50% increase
Museums, snake parks and historical sites visits	100% increase

Source: KNBS Economic survey 2022. Analysis: Author

The COVID 19 pandemic that catalysed travel restrictions and cancellation of flights worldwide among other containment measures dealt the tourism sector a major blow with domestic tourism softening the blow. Prior to the COVID 19 pandemic between 2015 and 2018; domestic tourism accounted for more than 50% of the total Bed Occupancy. Further, between the period of 2014 to 2018, the number of domestic tourists' bed-nights increased by 35 percent

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 4.2 percent to GDP (Statista 2021) , 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 third 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;

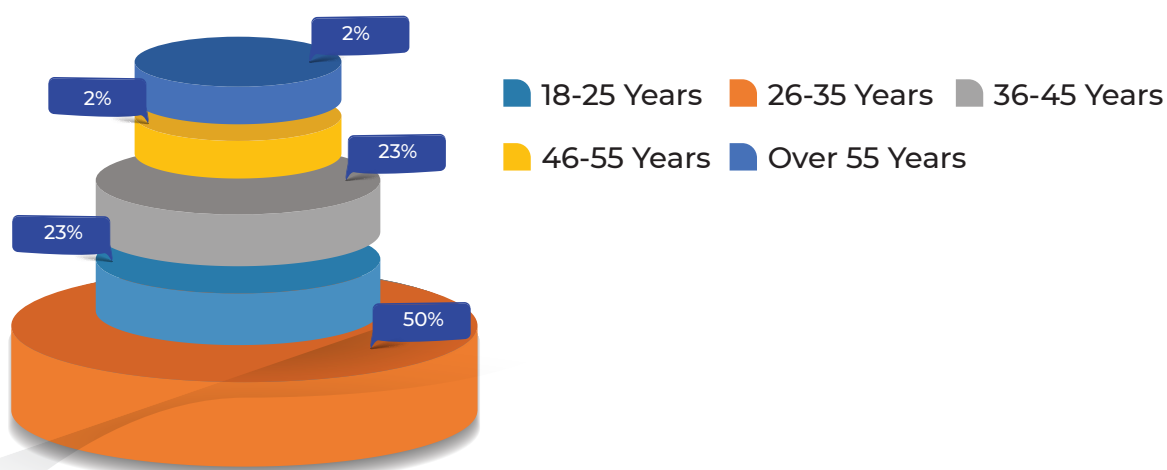
- 1-Establish demography of local tourist
- 2-Establish travel patterns of local tourist
- 3-Establish income levels of local tourist

Study Methodology

Study tool	Online & Telephone survey
Sample Size	133
Sample Design	Purposive {Counties; Nairobi, Kajiado, Machakos, Kiambu, Kisumu, Mombasa, Nakuru} Random {Within counties}

Results

Age Distribution



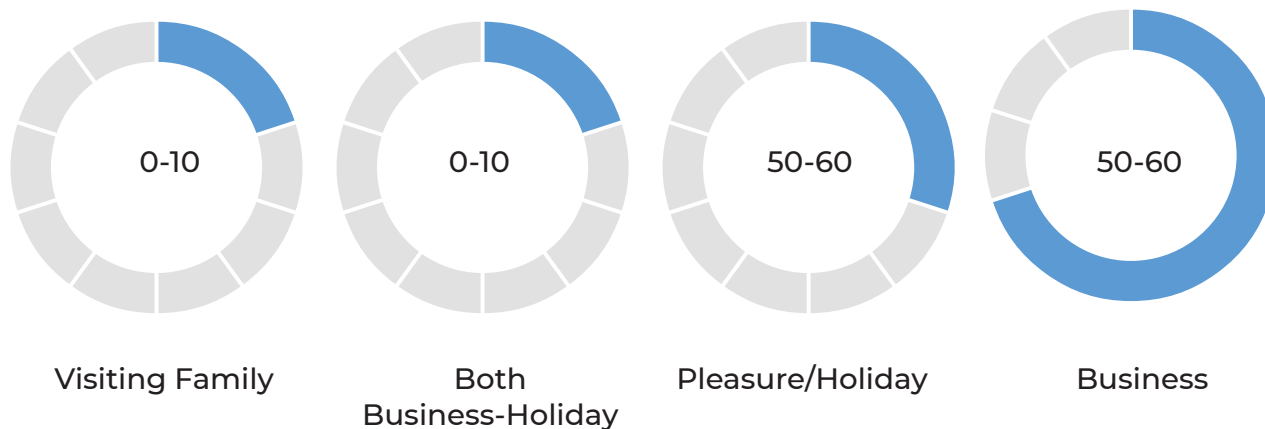
Insight

Comparison of age distribution between local and foreign tourist

73 percent of respondents indicated they were below 35 years of age with 27 percent being over 35 years. Similar studies by KNBS integrated household budget survey and tourism research institute corroborate the same age travel group

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

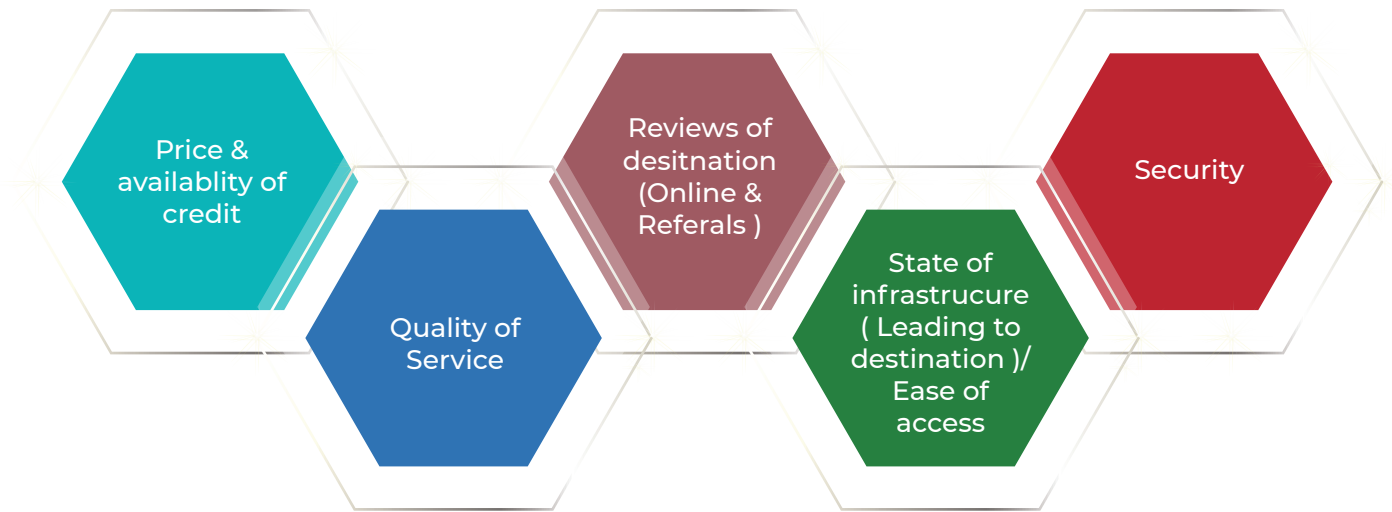
Purpose of Travel



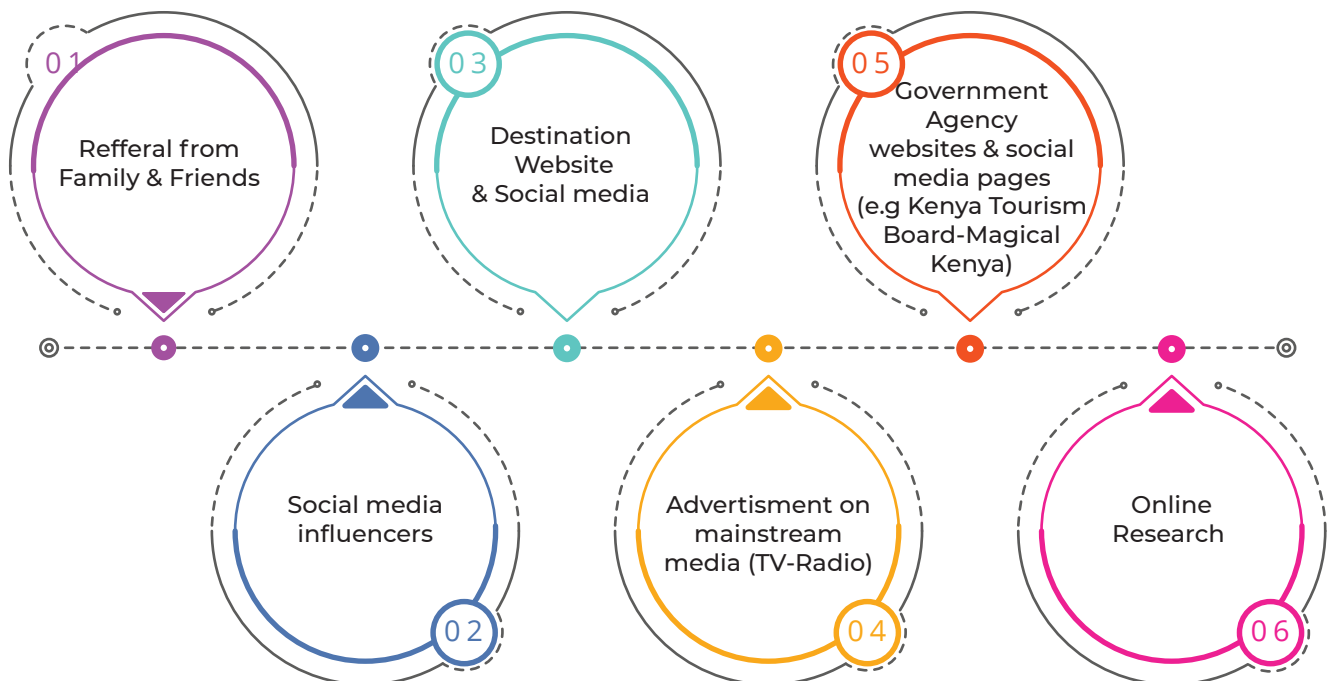
Consideration when selecting place to travel to in Kenya



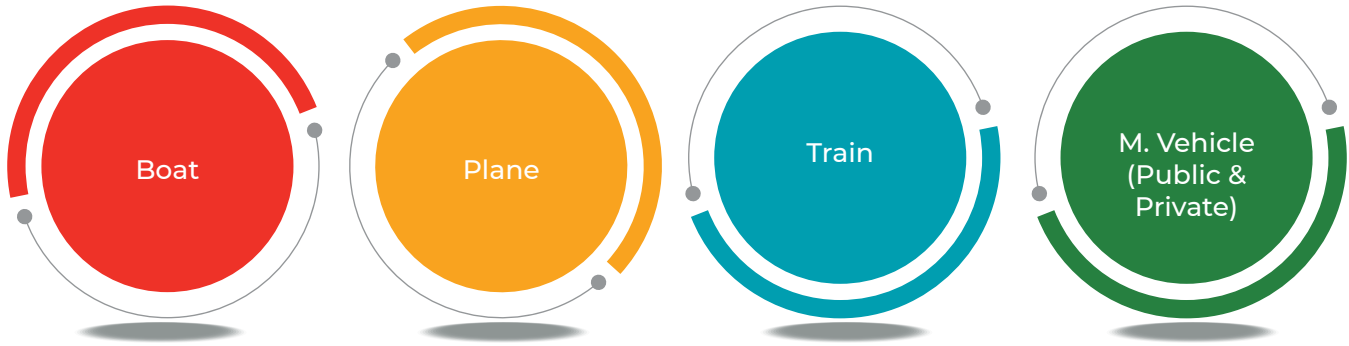
Consideration for selecting a specific destination



Destination discovery sources



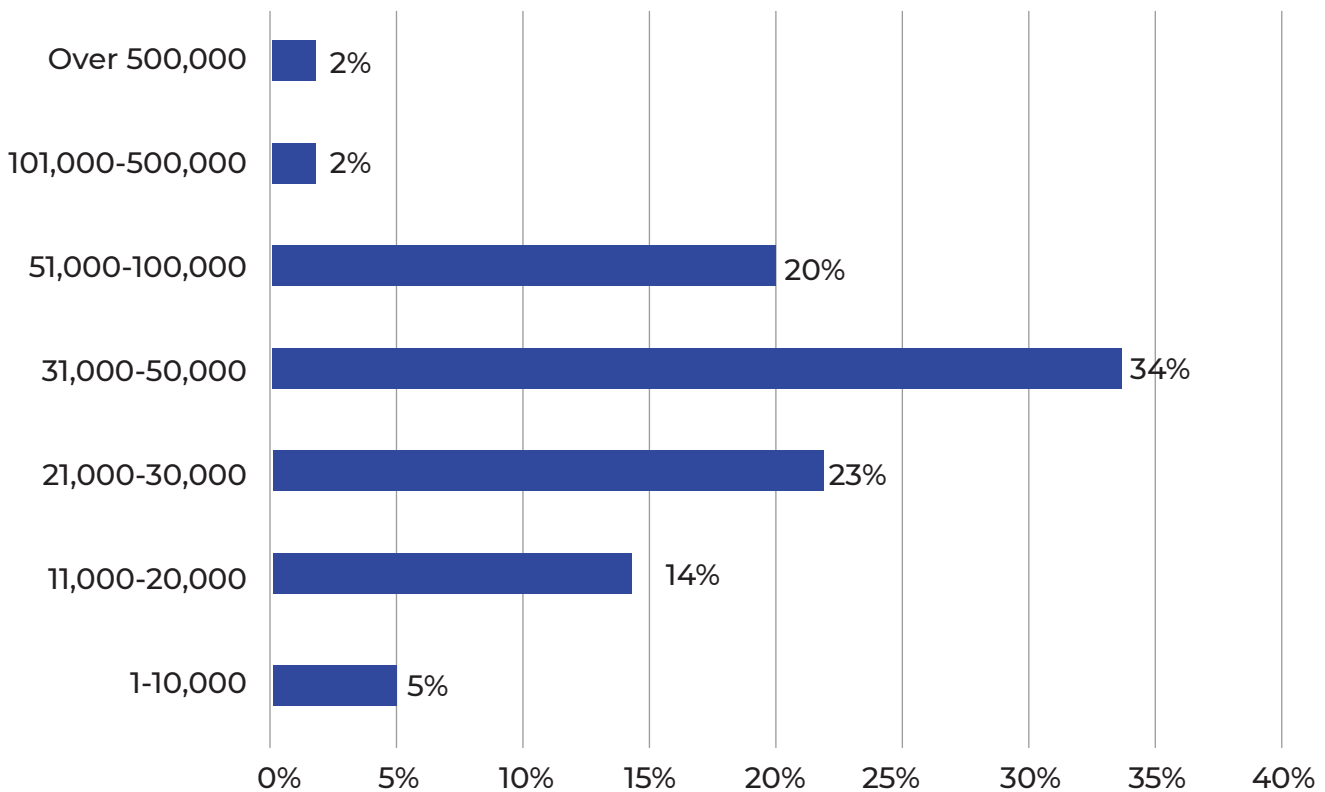
Preferred means of transport to travel destination



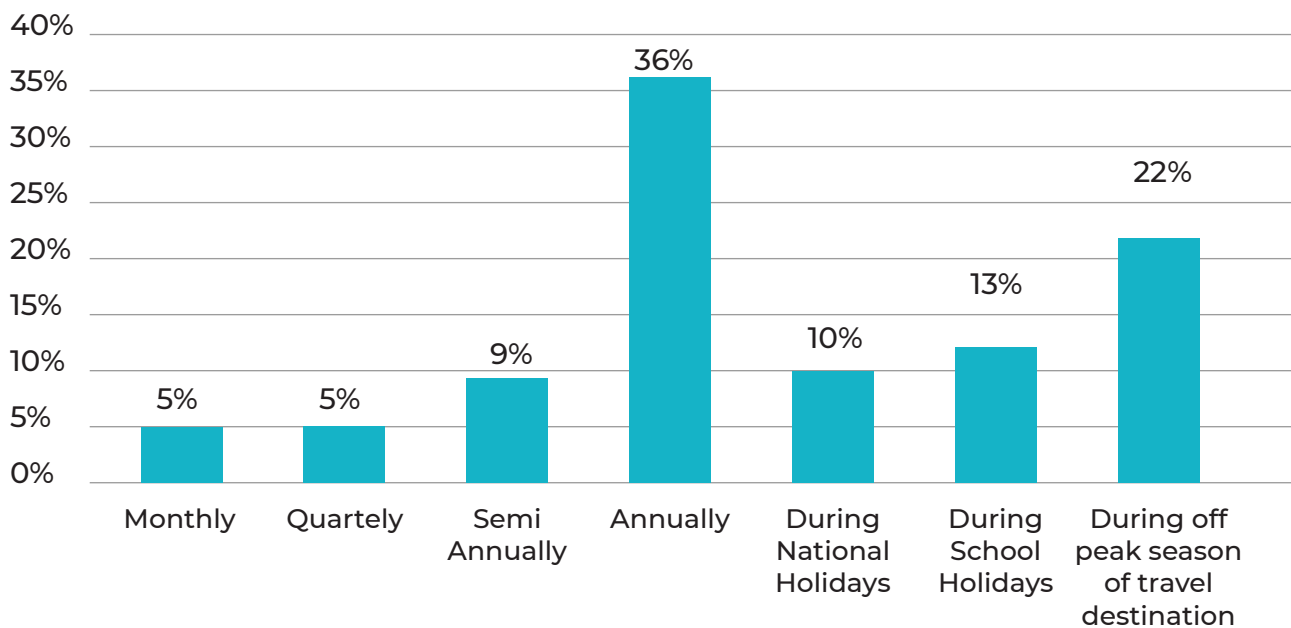
Insight

Public transport is most preferred mode of travel followed by; privately hired vehicles, privately owned vehicles, train, plane and final boat

Annual travel budget to preferred destination (Ksh)



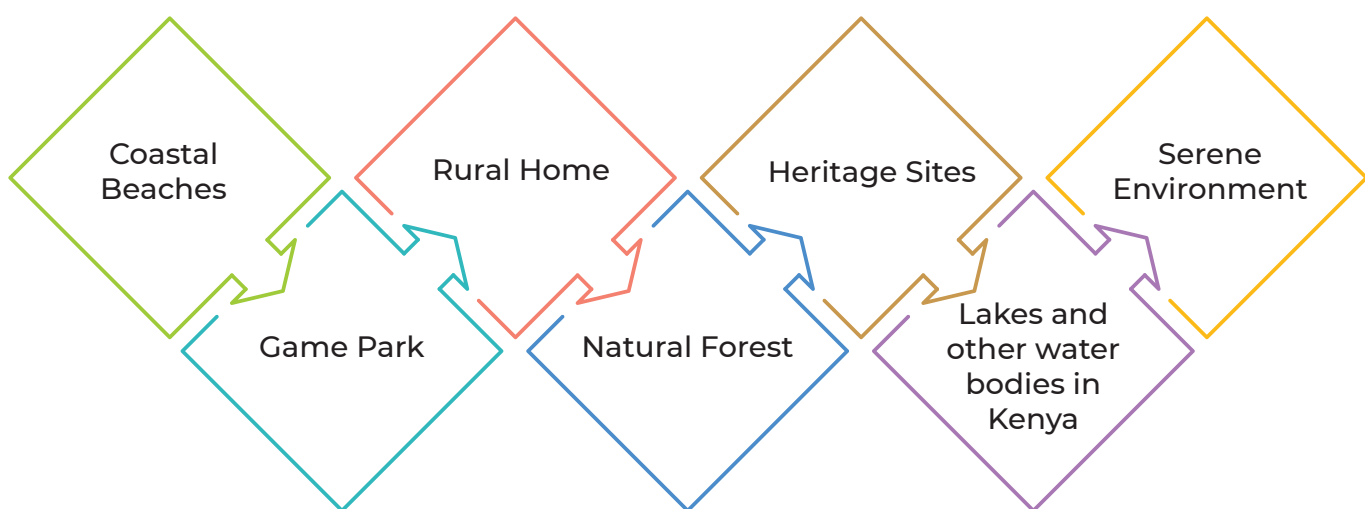
Frequency of travel to preferred destination



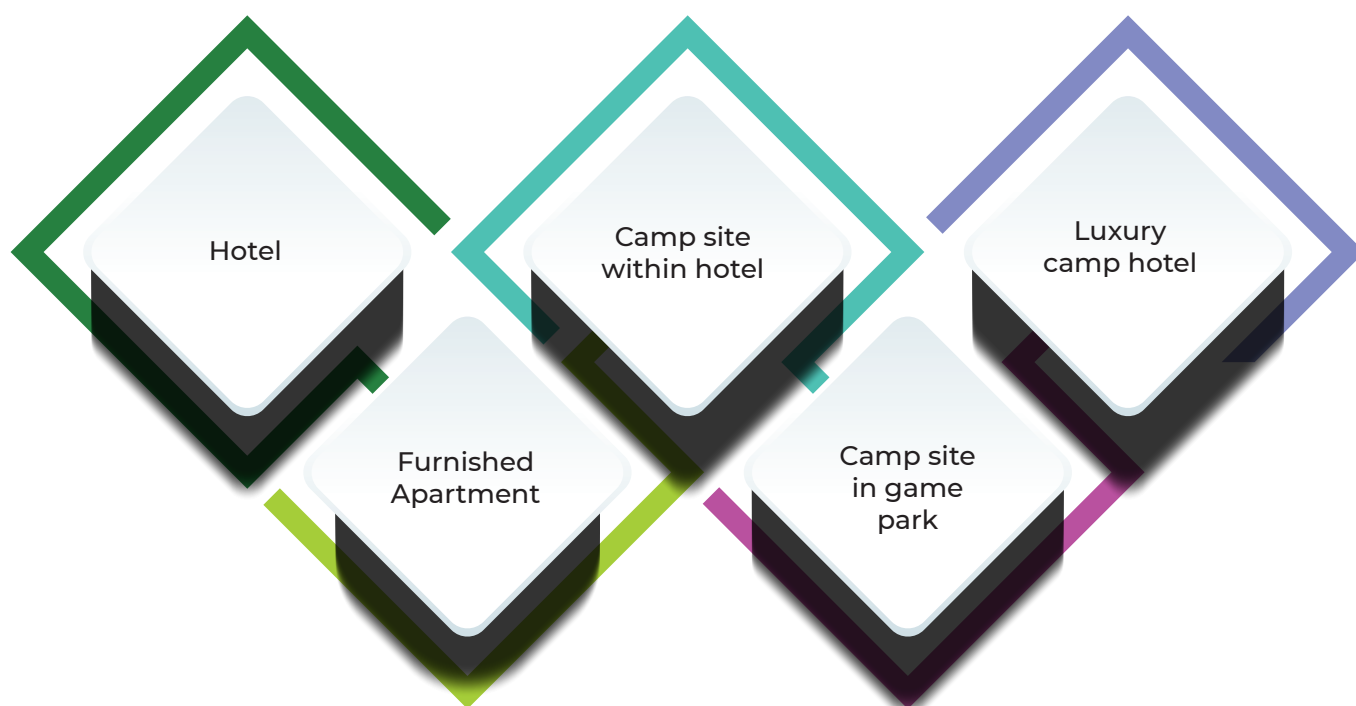
Insight

22 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

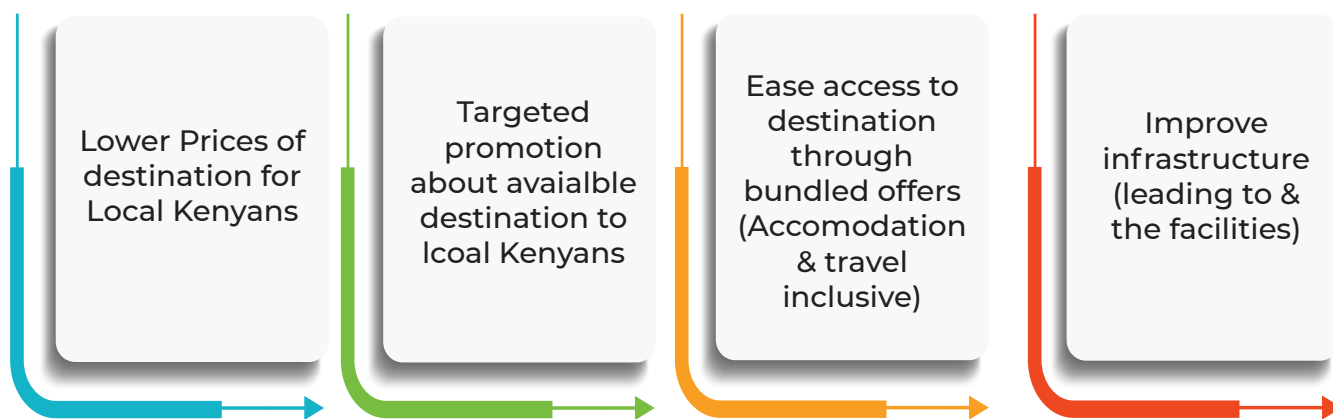
Preferred Attraction



Preferred Accommodation Type



Action to promote local tourism in 2022



References

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