



tourism market insights
Kenya

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1. Overview of Kenya

About Kenya

Where is Kenya?	Kenya lies on the Indian Ocean coast of central East Africa, where it is bounded in the north by Eritrea, Ethiopia, Sudan and Somalia, in the west by Uganda and in the south by Tanzania.
Population (millions)	53 million people
Time Difference	Kenya is 1 hour ahead of South Africa
Language	English (official) and Kiswahili (official)
Economy	Kenya is the economic, financial, and transport hub of East Africa. Kenya's real GDP growth has averaged over 5% for the last decade.
Formal Greeting	Hujambo (Hello)

Kenyans are very outgoing and prefer that every encounter starts with warm greetings. A person entering a shop, for instance, would start by shaking the shop attendant's hand and would proceed to make small talk before going about their business. The same practice should be repeated on departure.

It is considered good manners for visitors to mumble at least a salutation in the local language. Alternatively, visitors can use Jambo, the Swahili salutation that loosely translates to "Hello".

Kenyans have a relatively good sense of time. They will be punctual when there is a scheduled meeting. This, however, only refers to the sophisticated urban population.

Kenya Etiquette

Most business meetings are conducted in English. However, Kenyans are sensitive to the needs of strangers. It is common to find Kenyans going out of their way to make you feel comfortable. Even before a meeting commences, they will ask to know if you are comfortable or, if you prefer to have any extra arrangements made for the meeting such as enlisting the services of an interpreter.

2. Overview of the Kenya Travel Market

Kenya Travel Market

Largest Cities % of total population, number of people	1. Nairobi (2 750 547)
	2. Mombasa (799 668)
	3. Nakuru (259 903)
	4. Eldoret (218 446)
	5. Kisumu (216 479)

Disposable income Per capita, US\$ 2017	1,665
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Savings As % of disposable income	3.8 %
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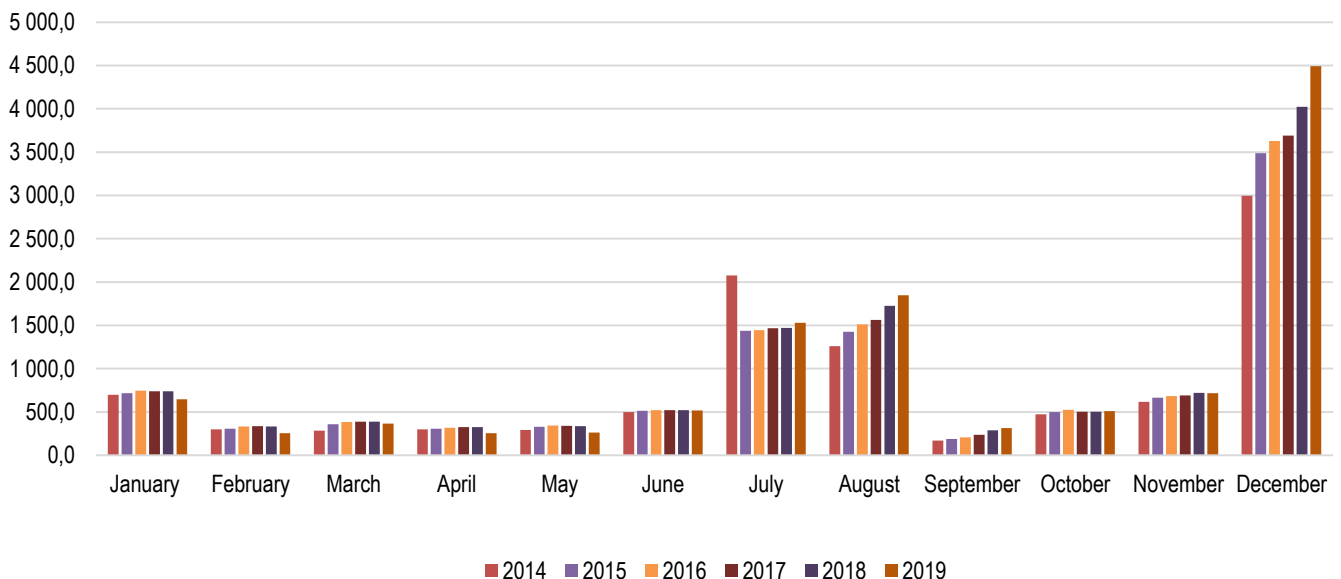
Median Age	19,8 years
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Paid Holidays (2018)	21.0
Public Holidays (2018)	9.0
Annual Leave (2018)	30.0

Outbound Departures ('000 trips)	1. 2017: 1 186,4
	2. 2018: 1 314,0
	3. 2019: 1 449,7

Top 5 Outbound Destinations ('000 trips, 2019)	1. Uganda: 420,3
	2. Tanzania: 281,0
	3. Rwanda: 55,4
	4. India: 55,2
	5. France: 47,9

NUMBER OF PEOPLE TRAVELLING BY MONTH, JAN – DEC (2014-2019)



3. The Kenya traveller to South Africa

Kenya Travel Market

Number of Arrivals	2015: 27 077
	2016: 29 319
	2017: 28 944
	2018: 29 193
	2019: 30 329

Purpose of visit to South Africa (2019)	MICE: 30,3%
	VFR: 15,7%
	Holiday: 13,6%

Average length of stay in South Africa (Number of nights)	2017: 23,0
	2018: 17,1
	2019: 15,7

Age profile (2019)	18-24: 8,8%
	25-34: 32,6%
	35-44: 36,8%
	45-54: 16,5%

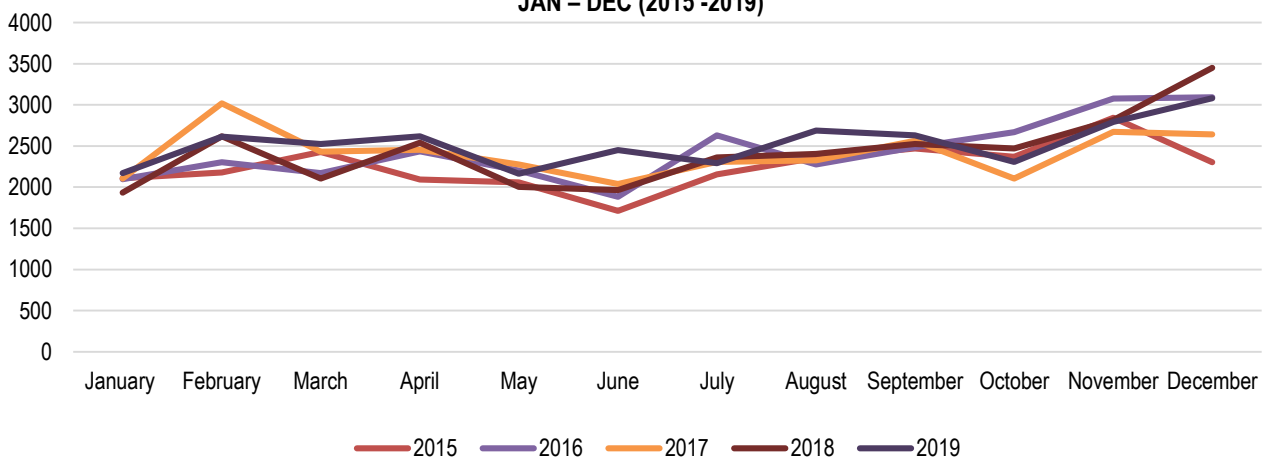
Repeater Rate of Kenya Travellers (2019)	First Timers: 33,7%
	2 – 3 times: 15,0%
	4 – 5 times: 14,2%
	6 – 9 times: 7,0%
	10 or more times: 30,0%

Accommodation Usage (2019)	Friends & Family (91,268)
	Hotels (89,832)
	Backpacker (83,030)

Total Foreign Direct Spend in South Africa (R in millions)	2017: R393
	2018: R397
	2019: R388

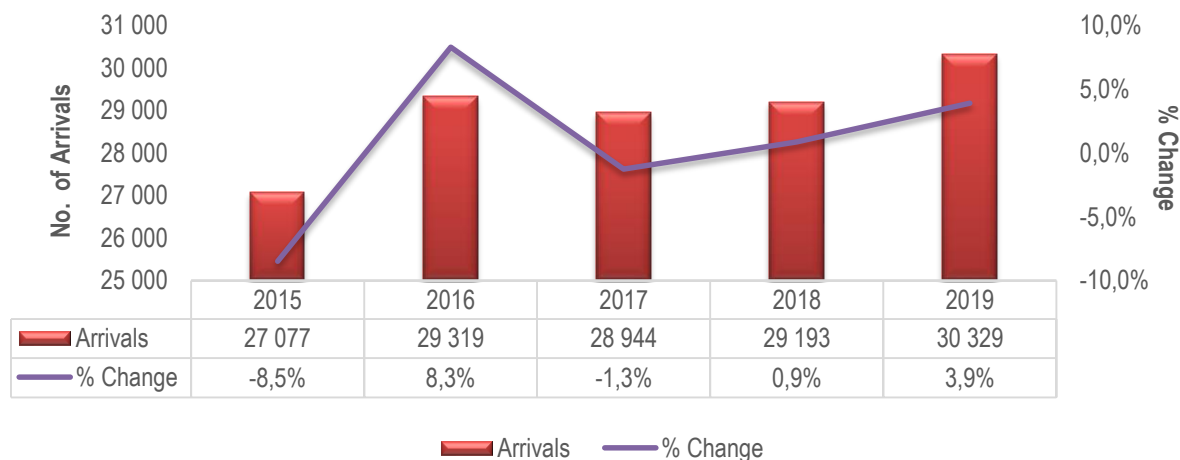
Average Spend in South Africa	2017: R15 400
	2018: R14 800
	2019: R14 100

SEASONALITY PATTERNS: KENYAN TRAVELLERS TO SOUTH AFRICA BY MONTH, JAN – DEC (2015 -2019)



3. The Kenyan traveller to South Africa

3.1. Kenyan Tourist Arrivals to South Africa



3.2. Purpose of visit to South Africa

Kenyan travellers to South Africa indicated MICE (Meetings, Incentives, Conferences & Exhibitions; 30,3%) as their top reason for visiting the country, followed by 15,7% who visited friends and relatives and 13,6% who travelled for holiday.

In 2019, Kenyan travellers stayed in South Africa for an average of 15,7 nights and are typically between the ages of 35 - 44 (36,8%) and 25 - 34 (32,6%) years. 33,7% of Kenyans were first time visitors in 2019 and 66,3% travelled to the country before.

Top reasons for travel to SA

MICE (30,3%)

VFR (15,7%)

Holiday (13,6)

Average length of stay (2019)

15,7 nights

3.3. Activities in South Africa

Top activities undertaken

Shopping

Business

Education/training/Study

Beaches

Visiting Natural Attractions

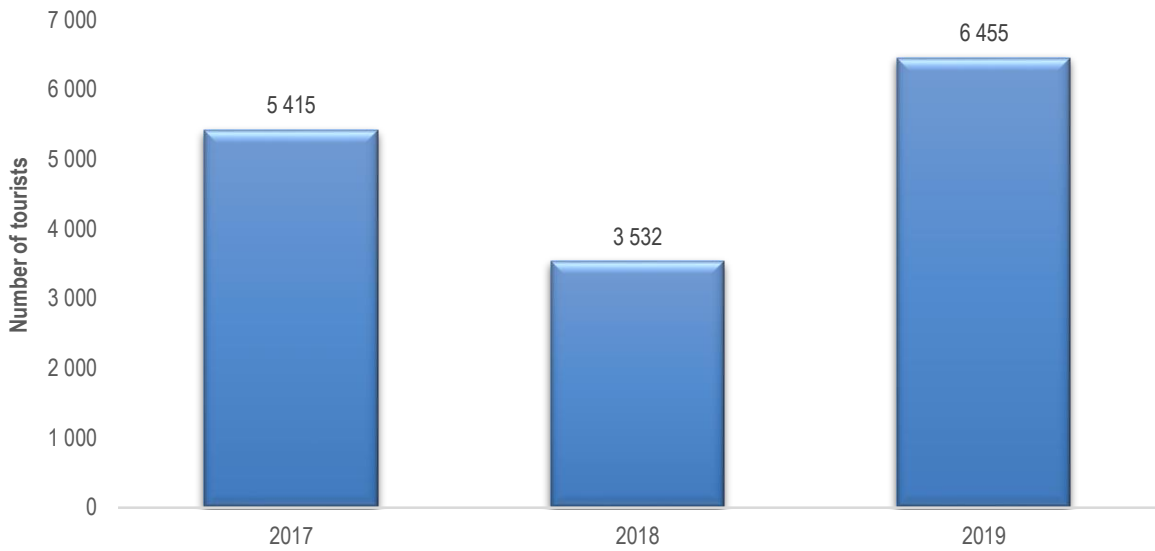
Tabulated on the left are the top activities enjoyed by Kenyan tourists in South Africa. Shopping, business, education/training/study, beaches visiting natural attractions ranked as the top five activities undertaken by these tourists.

In 2019, their average spend was R14 100 per tourist.

Kenyan travelers to the country are more likely to stay with family and friends or book a hotel. However, ranking as the 3rd highest share of travellers, slightly over 83,000 opted for backpacker accommodation during their stay.

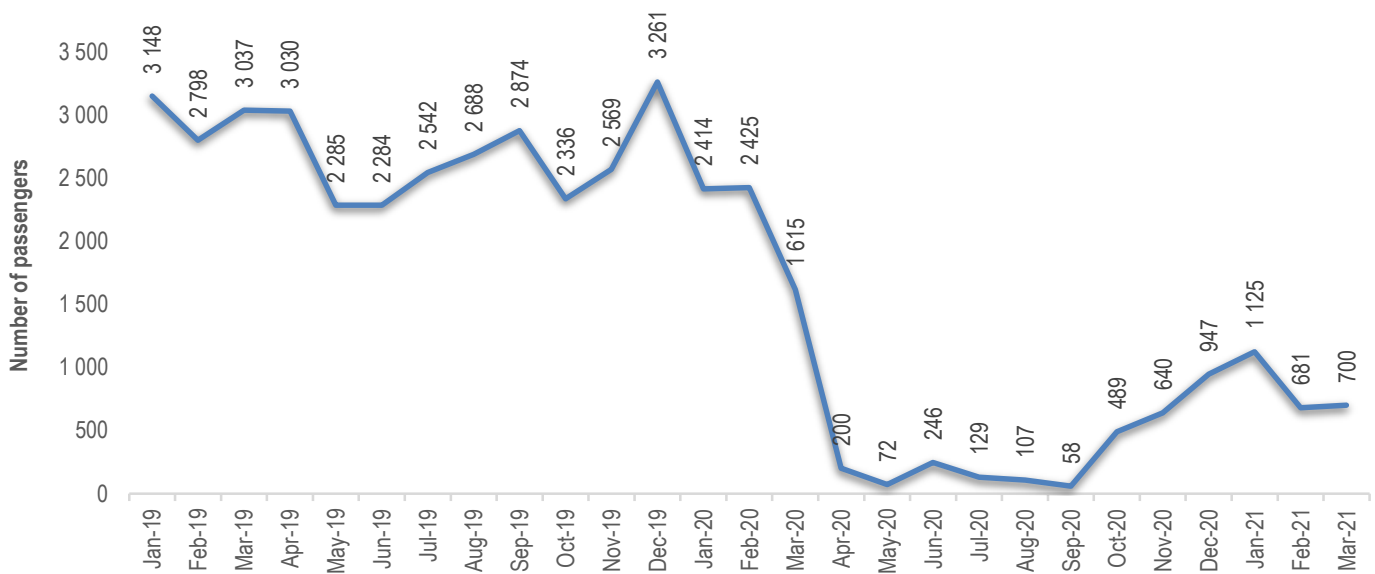
4. The Kenyan traveller to the Western Cape

4.1. Kenyan Tourist Arrivals to the Western Cape



4.2. Kenyan passengers through the Cape Town International Airport

During the challenging nationwide lockdown which commenced on the 27th March 2020, the tourism and hospitality sectors have been the hardest hit throughout Africa. However, the announcement of business continuity brought much hope for the Western Cape. Kenyan passenger movement only picked up in October 2020 and steadily increased month-to-month until January 2021. Another drop in passengers was experienced during February and March 2021. However, when observing 2019 passenger movement trends, January and December 2019 marked the highest level of movement and are likely the more popular months for travel from this market.



5. Key Findings

South Africa welcomed over 30,000 Kenyan travellers to its shores in 2019 which translated into a 3.9% increase in tourists to the country, a total foreign direct spend of R388 million and an average expenditure of R14,100 per tourist.

Kenyan travellers to South Africa indicated MICE (Meetings, Incentives, Conferences & Exhibitions; 30,3%) as their top reason for visiting the country, followed by 15.7% who visited friends and relatives and 13,6% travelled for holiday.

In 2019, the Kenyans stayed in South Africa for an average of 15,7 nights and were typically between the ages of 35 - 44 (36,8%) and 25 - 34 (32,6%) years.

During the same year, 33,7% of Kenyans were first time visitors and 66,3% travelled to the country before.

Shopping, business, education/training/study, beaches visiting natural attractions ranked as the top five activities undertaken by these tourists.

Kenyan travelers to South Africa are more likely to stay with family and friends or book a hotel. However, ranking as the 3rd highest share of travellers, slightly over 83,000 opted for backpacker accommodation during their stay.

The Western Cape recorded 6,455 Kenyan tourists in 2019 and increased by a significant 82.8% year-on-year; showing much promise from this market.

On the back of an impressive growth rate in 2019, tourist numbers to the province were severely affected by the global COVID-19 pandemic. Airport movement from Kenya only reached levels of between 50 and 200 passengers over the April to September 2020 period.

Nonetheless, Kenyan passenger movement picked up in October 2020 and steadily increased month-to-month until January 2021. Another drop in passengers was experienced during February and March 2021.

When observing 2019 passenger movement trends, January and December 2019 marked the highest level of movement and are likely the more popular months for travel to Cape Town.

6. List of sources

1. South African Tourism
2. Euromonitor International
3. OAG Passenger Traffic Analysis

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