



**Tourism Market Insights  
Kenya: 2021**

**WESGRO**  
cape town & western cape  
research

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# 1. Overview of 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.

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Population (2020 estimate) 53.8 million

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Time Difference Kenya is 1 hour ahead of South Africa

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Language English (official) and Kiswahili (official)

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Economy In 2020, Kenya's economic growth slowed down considerably, largely attributed to COVID-19 and the measures taken to avoid the spread of the virus. The effects of the pandemic are expected to result in long-term challenges, plus an increase in poverty and unemployment.

Kenya's government amended fiscal and monetary policies in response to the impact of the health crisis. Though, lower public revenues, and increased debt and deficit are anticipated to remain a challenge over the medium term.

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Formal Greeting Hujambo (Hello)

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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".

Kenya Etiquette 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.

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.

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## 2. Overview of the Kenyan Travel Market

Largest Cities % of total population, number of people	<ol style="list-style-type: none"> <li>1. Nairobi (2 750 547)</li> <li>2. Mombasa (799 668)</li> <li>3. Nakuru (259 903)</li> <li>4. Eldoret (218 446)</li> <li>5. Kisumu (216 479)</li> </ol>
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Disposable income Per capita, KES million (2020)	8,695
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Savings As % of disposable income (2020)	3.8 %
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Median Age (2020)	20.1 years
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Outbound Departures ('000 trips)	<ol style="list-style-type: none"> <li>1. 2016: 1,151,3</li> <li>2. 2017: 1,158,6</li> <li>3. 2018: 1,249,6</li> <li>4. 2019: 1,349,2</li> <li>5. 2020: 375,0</li> </ol>
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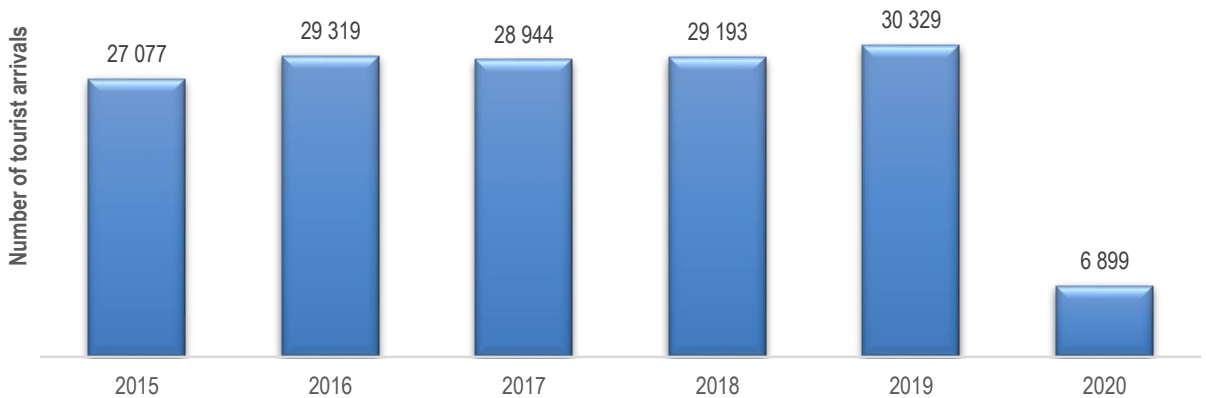
Outbound Departures by Mode of Transport ('000 trips) (2020)	<ol style="list-style-type: none"> <li>1. Air: 281,6</li> <li>2. Land: 88,7</li> <li>3. Water: 4,7</li> </ol>
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Outbound Departures by Type of Trip ('000 trips) (2020)	<ol style="list-style-type: none"> <li>1. Business: 70,3</li> <li>2. Leisure: 304,8</li> </ol>
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Outbound Departures ('000 trips)	2016	2017	2018	2019	2020	2021
Uganda	352.8	334.8	374.0	396.2	84.8	159.5
Tanzania	233.7	231.0	238.6	254.3	72.9	105.4
United Arab Emirates	33.0	34.6	31.0	58.6	23.4	26.9
Rwanda	50.7	41.2	49.0	58.5	14.4	24.0
France	40.0	39.3	39.5	40.6	14.5	23.9
India	44.8	46.0	48.8	48.6	13.2	20.0
United States	25.2	29.5	33.5	35.5	7.3	16.7
Indonesia	9.5	19.7	31.0	24.6	13.4	14.4
South Africa	29.4	29.0	29.2	30.4	8.6	13.5
United Kingdom	19.5	23.1	22.2	22.5	9.4	13.5

Source: Euromonitor International, 2021

### 3. The Kenyan Traveller to South Africa



Purpose of visit to South Africa (2020)

MICE: 32,2%  
Business traveller: 15,4%  
VFR: 10,1%  
Holiday: 9,5%

Average length of stay in South Africa  
(Number of nights)

2018: 17,1  
2019: 15,7  
2020: 15,6

Top 3 age categories (2020)

25-34: 33,7%  
35-44: 31,5%  
45-54: 22,9%

Repeater Rate of Kenyan Travellers (2020)

First Timers: 27,7%  
2 – 3 times: 24,6%  
4 – 5 times: 17,4%

Top 3 accommodation choices (2019)

Friends & Family: 91,268  
Hotels: 89,832  
Backpacker: 83,030

Total Foreign Direct Spend in South Africa  
(R in millions)

2018: R397  
2019: R388  
2020: R85

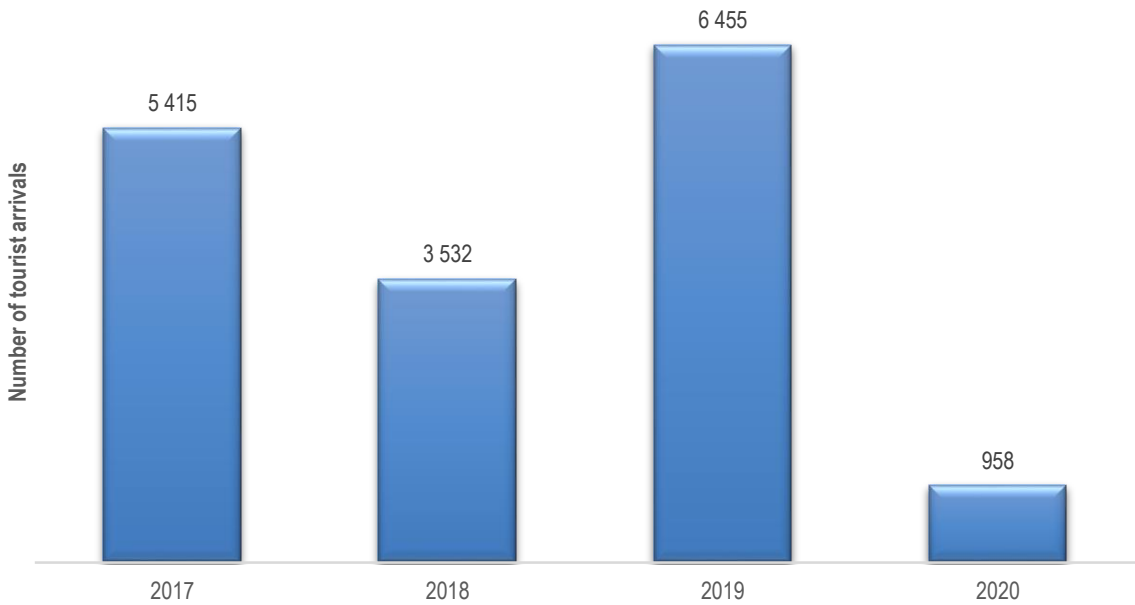
Average Spend in South Africa

2018: R14,800  
2019: R14,100  
2020: R13,500

Top activities enjoyed in South Africa (2020)

Education / training / study  
Business  
Nightlife  
Theme parks  
Sporting-competed

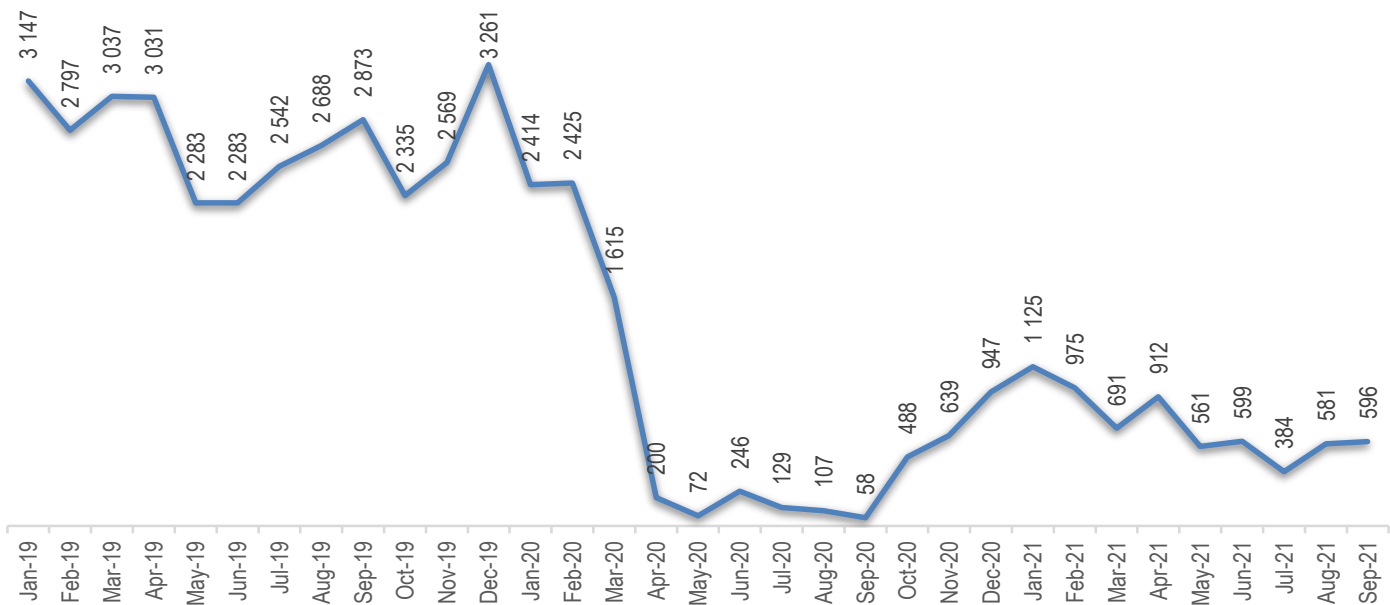
## 4. The Kenyan traveller to the Western Cape



Source: SA Tourism, 2021

### 4.1 Kenyan passengers through the Cape Town International Airport

During the challenging nationwide lockdown which commenced on the 27<sup>th</sup> 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, followed by a 32% spike in April. Though, when observing the passenger movement trends across the last three years, January marked the highest level of movement and are likely the more popular month for travel from this market.



Source: Passenger Traffic Analyser, 2021

## 5. Key Findings

According to the Euromonitor September 2021 Tourism Flows: Kenya report, Kenyan tour operators are gradually directing their services at domestic holiday makers in 2021, given the continued threat of COVID-19.

Funding opportunities emerged from the World Bank which will allow Kenya to fast-track its COVID-19 vaccination program. In turn, this will allow the country to ease restrictions and boost confidence in travelling.

South African Tourism's (SAT) latest 2020 trends revealed that subsequent to the halt in direct flights, Addis Ababa increased its dominance as the top hub (55%) from August 2020. In addition, the most apparent trend post COVID-19 includes longer stays, to which Kenyan tourists have proven to be no exception. Stays of 22 nights and more increased from 9% in 2019 to 24% of tickets issued from August 2020.

In 2020, South Africa welcomed 6,899 Kenyan travellers to its shores, a 77,3% decrease in tourists which is largely due to the impact of COVID-19 on the global tourism economy.

Kenyan visitors to South Africa in 2020 indicated MICE (Meetings, Incentives, Conferences & Exhibitions; 32,2%) as their top reason for travelling to the country, followed by 15,4% who embarked on business trips. An additional 10,1% visited friends and family and 9,5% were on holiday.

The Kenyans stayed in South Africa for an average of 15,6 nights in 2020 and were typically between the ages of 25 - 34 (33,7%) and 35 - 44 (31,5%) years.

During the same year, 27,7% of Kenyans were first time visitors and 72,3% travelled to the country before. Education/training/study and business ranked as the top two activities undertaken by these tourists.

Subsequent to a strong performance in 2019 with an increase of 82.8% in tourists from Kenya, the impact of the pandemic hit the Western Cape's tourism sector hard in 2020. Only 958 Kenyan tourists travelled to the Western Cape in 2020, registering a 85.2% decline in arrivals when compared to 2019.

The effects of COVID-19 were also visible in the volume of Kenyan passengers passing through the Cape Town International Airport. Kenyan passenger levels only reached between 50 and 200 from April to September 2020. Nonetheless, Kenyan passengers picked up in October 2020 and steadily increased month-to-month until January 2021.

When observing 2019/2020 passenger movement trends, January and December marked the highest level of movement across both years and are likely the more popular months for travel to Cape Town.

Looking ahead towards 2026, an estimated 13,500 outbound departure trips are predicted for travel from Kenya to South Africa in 2021 and is set to reach 44,700 in 2026.

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## 6. Sources

1. South African Tourism
2. Euromonitor International
3. OAG Passenger Traffic Analysis
4. <https://worldpopulationreview.com/countries/cities/kenya>

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