



Tourism Trend Analysis of Select East African Markets

Kenya, Ethiopia, Tanzania & Uganda
November 2022

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An aerial photograph of a coastal road in South Africa. The road is a two-lane asphalt road that curves along the edge of a steep, rocky cliffside. The cliffside is covered in sparse, dry vegetation. In the background, the ocean is a deep blue, with white waves crashing against the shore. In the distance, there are several large, rugged mountains with flat tops, characteristic of the Cape Peninsula. The sky is bright blue with scattered white clouds. The overall scene is a beautiful coastal landscape.

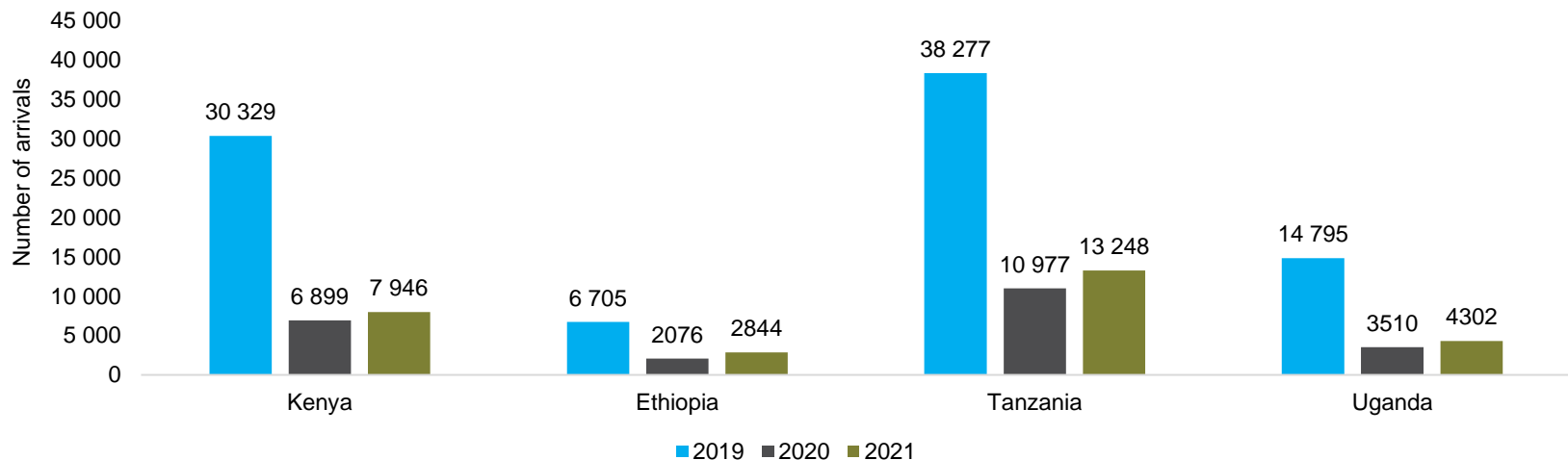
EAST AFRICA 2019 - 2021

East Africa Travel Trends in South Africa

According to the latest tourism performance report published by South African Tourism (2021), international tourist arrivals to South Africa reached 2.8 billion in 2020, a decline of -72,4% on that recorded in 2019, due mainly to the COVID-19 pandemic and subsequent lockdowns imposed. Still, Africa remains South Africa's largest source market continent, accounting for 76,3% of tourist arrivals recorded.

The graph below reflects tourist arrivals to South Africa for the period 2019 – 2021 from select East African countries. Over the period under review, the highest number of tourist arrivals from these markets into South Africa was in 2019. Encouragingly, growth in tourist arrivals from all four markets was evident in 2021.

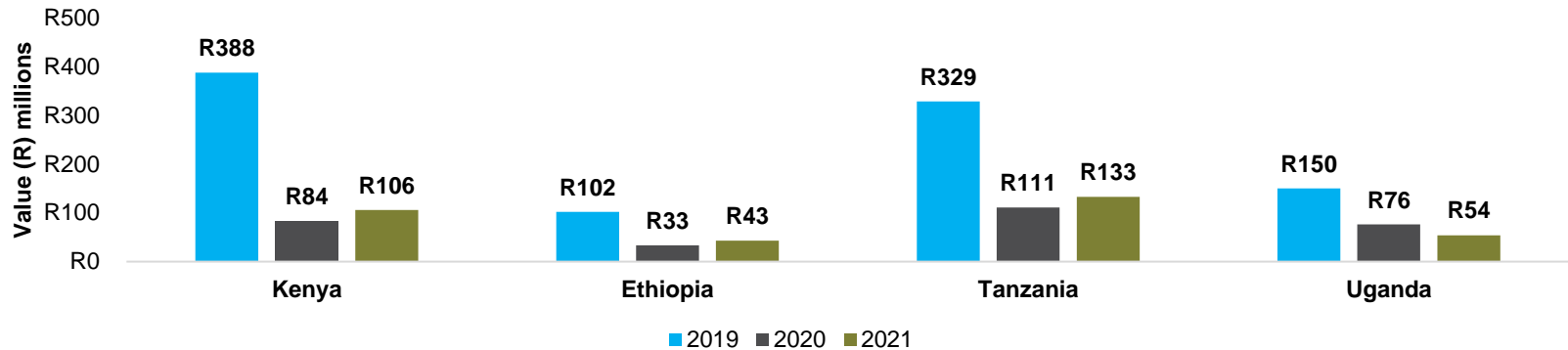
East African Tourist Arrivals in South Africa (2019 - 2021)



Source: South African Tourism - 2022

East Africa Travel Trends in South Africa

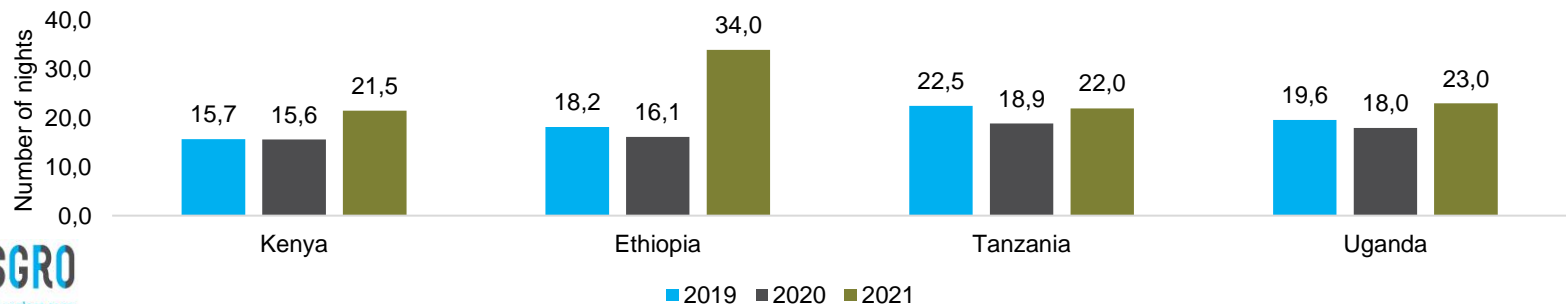
East African Tourists Total Foreign Direct Spend (TFDS) 2019 - 2021



Tourists from the select East African countries showed a high total foreign direct spend in 2019 with R388 million and R329 million spent by Kenya and Tanzania respectively in South Africa. Despite the decline in spend seen in 2020, this rose gradually again in 2021 in all of the select markets except Uganda.

The highest average length of stay over the period analysed was reached in 2021 by all four countries under review.

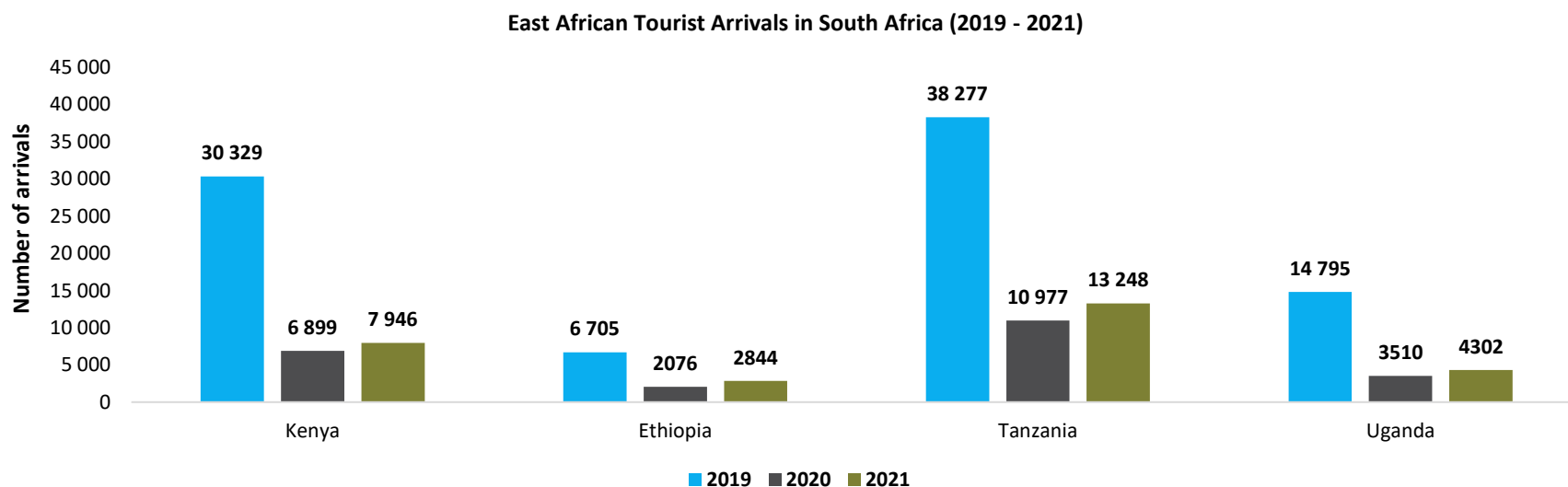
Average Length of Stay



East Africa Travel Trends in the Western Cape

The Western Cape is said to be a world in one province. In 2019, the Western Cape saw the strongest volume in African tourists with 280 489 visitors recorded. Despite a drastic decline in 2020, tourist arrivals from Africa into the province recovered and grew by modest 17,2% y-o-y in 2021.

The graph below reflects tourist arrivals into the Western Cape from the select East African countries. Over the period under review, the highest number of tourist arrivals was seen in 2019, with a total of 90,106 arrivals from the four countries reviewed.



An aerial photograph of a coastal road in South Africa. The road is a two-lane asphalt road that curves along the edge of a steep, rocky cliffside. The cliffside is covered in sparse, dry vegetation. Below the road, the ocean is a deep blue, with white waves crashing against the rocks at the base of the cliff. In the background, several large, rugged mountains rise from the coast under a bright blue sky with scattered white clouds. The overall scene is a dramatic coastal landscape.

Kenya 2019 - 2021

The Kenyan Traveler to South Africa

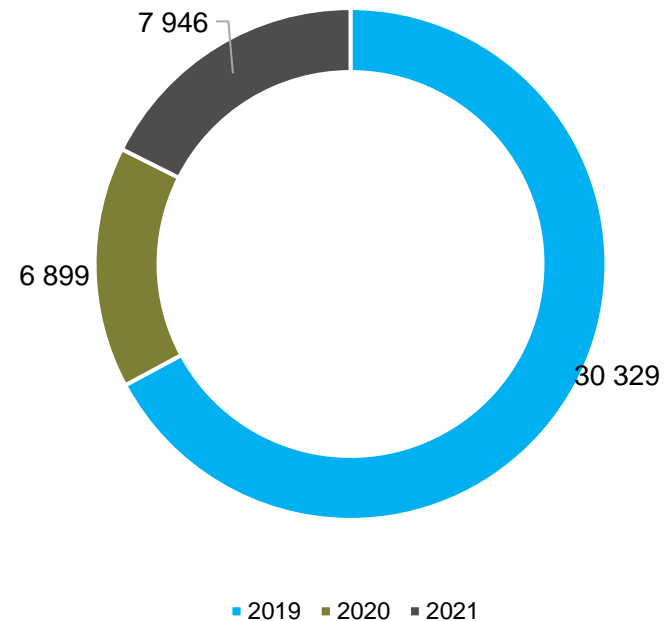
Kenya lies on the Indian Ocean coast of central East Africa, bordered in the north by Eritrea, Ethiopia, Sudan and Somalia, in the west by Uganda and in the south by Tanzania.

Kenya is the economic, financial, and transport hub of East Africa. Kenya's real GDP growth has averaged over 5% for the last decade.

In 2020, South Africa welcomed 6,899 Kenyan travelers to its shores, a decline of 77,3% y-o-y compared to 2019 due largely to the impact of COVID-19 on the global tourism economy.

A return of Kenyan tourists to South Africa was seen in 2021 with 7 946 arrivals recorded, a 15.2% y-o-y increase on the 6 899 arrivals recorded in 2020.

Kenyan Tourist Arrivals to South Africa (2019 - 2021)



Kenyan Travel Trends in South Africa

- Over the years under review, business tourism, which includes (MICE) “Meetings, Incentives, Conferences and Events”, was the leading reason for Kenyan tourists visits to South Africa. This was followed by those who came to visit friends & relatives (VFR), as well as holiday goers.
- Kenyan tourists preferred staying with friends and family, followed by hotels. Over the review period, 2021 recorded the highest average length of stay in the country with 21,5 nights recorded.

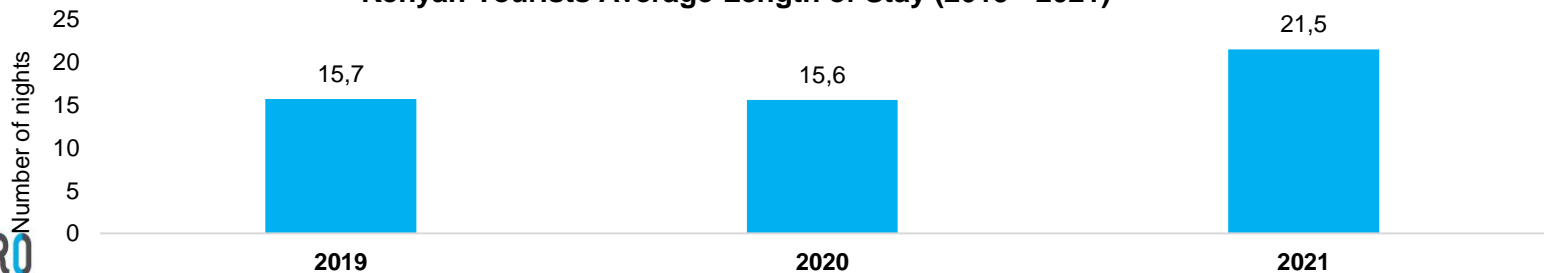
Top Reasons For Travel

2019	2020	2021
MICE - 30,3%	MICE - 32,2%	MICE - 14,1%
Business traveller - 10,9%	Business traveller - 15,4%	Business traveller - 9%
VFR - 15,7%	VFR - 10,1%	VFR - 18,3%
Holiday - 13,6%	Holiday - 9,5%	Holiday - 18,4%

Accommodation Usage

2019	2020	2021
Friends & Family - 91 268	Friends & Family - 23 038	Friends & Family - 35 102
Hotel - 89 832	Hotel - 22 017	Hotel - 22 790
Backpacker - 83 030	Guest House - 14 606	Self-Catering - 19 945

Kenyan Tourists Average Length of Stay (2019 - 2021)



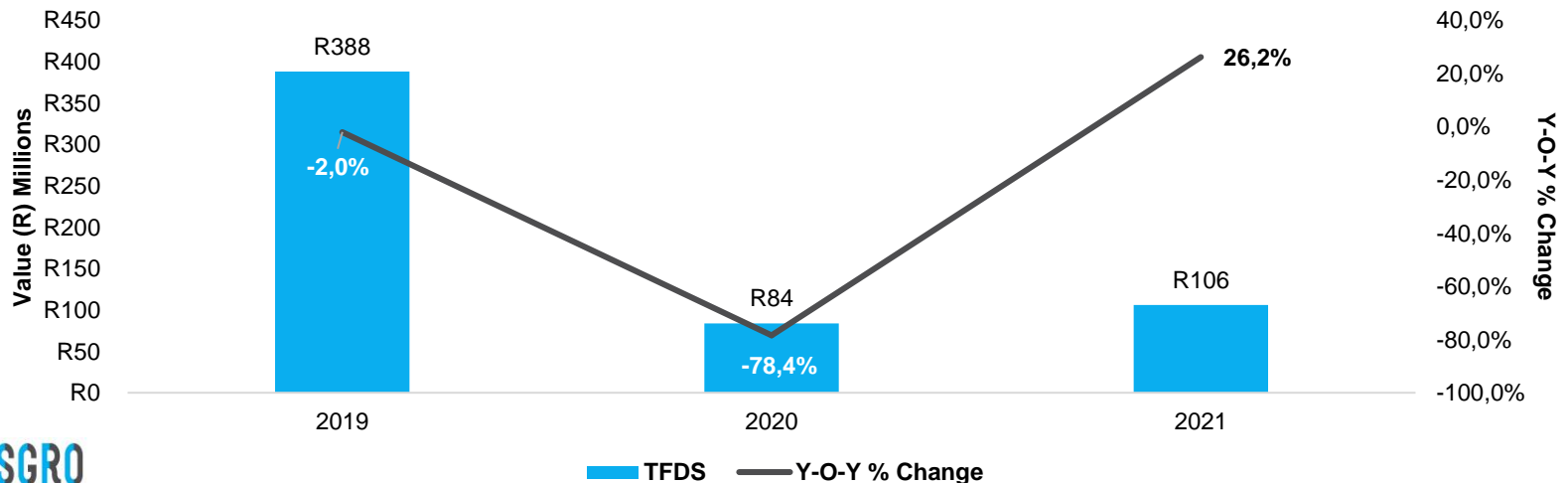
Kenyan Travel Trends in South Africa

- Kenyan tourists are typically between the ages of 25 – 30 and 35 – 40 years as tabled below. Since 2021, the numbers have shifted slightly with travelers aged 41–50-years holding the highest travel share with 24,4%.
- Over the period 2019 – 2021, the highest Total Foreign Direct Spend (TFDS) was recorded in 2019 (R388 million), a slight decline of -2,2% as compared to 2018's value of R396 million.

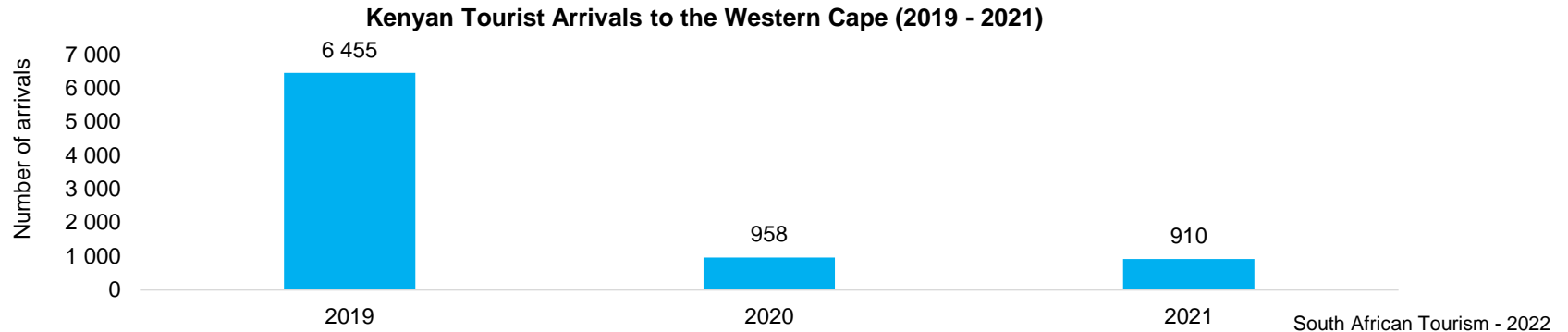
Age Profile of Kenyan Tourists, 2019 - 2021

2019	2020	2021
35 - 40 = 24,1%	41 - 50 = 18,4%	41 - 50 = 24,4%
41 - 50 = 22,0%	35 - 40 = 17,3%	31 - 34 = 20,6%
25 - 30 = 17,1%	25 - 30 = 15,6%	25 - 30 = 17,4%

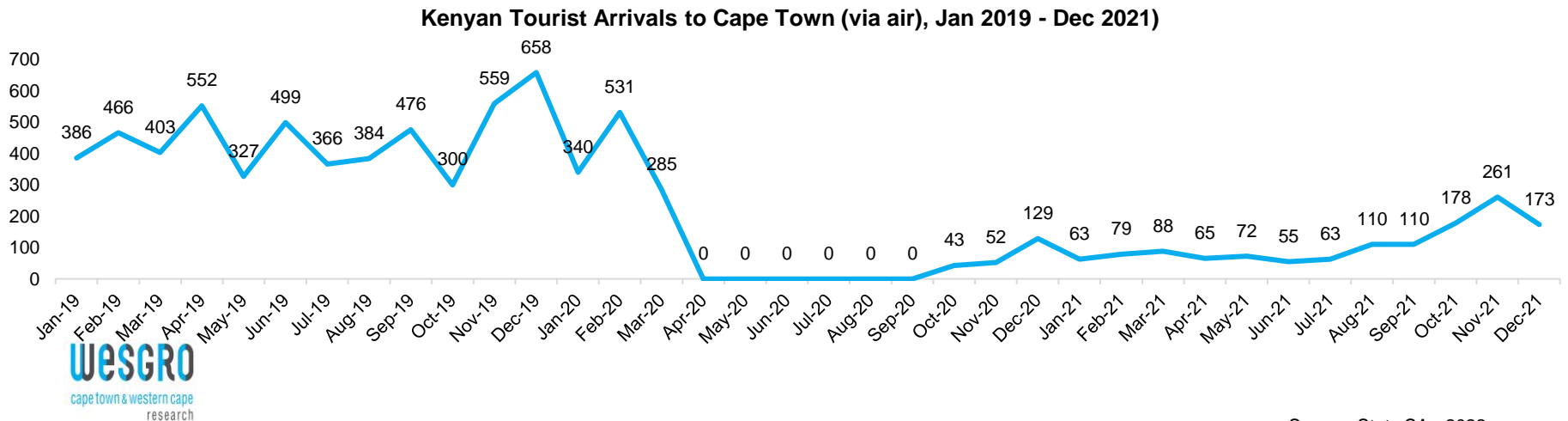
Kenyan Tourists Total Foreign Direct Spend (TFDS) 2019 - 2021



The Kenyan Traveler to the Western Cape



The tourism and hospitality sectors throughout Africa were of the hardest hit by COVID-19. That said, as restrictions were gradually lifted, and markets began to open up, Kenyan passenger movement into South Africa started to recover in late 2020, steadily increasing month-to-month into 2021. When observing 2019 passenger movement trends, November and December marked the highest level of movement and are likely to be the more popular months for travel from this market.



An aerial photograph of a coastal road in South Africa. The road is a two-lane asphalt road that curves along the edge of a steep, rocky cliffside. The cliffside is covered in sparse, dry vegetation. The ocean is a deep blue, with white waves crashing against the rocks at the base of the cliff. In the distance, there are several large, rugged mountains with flat tops, characteristic of the Cape Peninsula. The sky is bright blue with scattered white clouds.

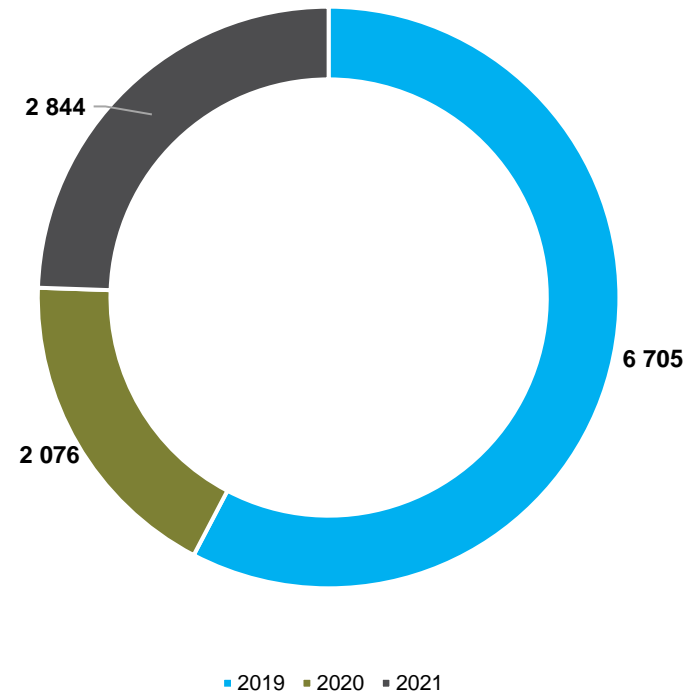
Ethiopia 2019 - 2021

The Ethiopian Traveler to South Africa

A report on the tourism flows in South Africa was published by **Euromonitor International in September (2021)**, the report highlights that “over a year after announcing a National State of Disaster, restrictions in affected areas were tightened in anticipation of increased infection rates and eased when they decline. Apart from lockdowns, the economic shock of the pandemic has also been significant, with the rate of unemployment soaring above 30%. This further led many consumers to reduce their discretionary travel in areas like leisure travel”.

According to data published by South African Tourism (2021), the highest number of Ethiopian tourist arrivals to the country was seen in 2019. Declines were however observed in 2020, with 2020 seeing a drop of -69% in tourist arrivals. Numbers have since picked up and a positive growth of 37% was recorded in 2021.

Ethiopian Tourist Arrivals to South Africa (2019 - 2021)



Source: South African Tourism - 2022

Ethiopian Travel Trends in South Africa

- Ethiopian travelers to South Africa predominantly visited for Meetings, Incentives, Conferences and Events (MICE), and for visiting friends & relatives (VFR) as well as those travelling for leisure. A big part of traveling includes accommodation and among all the different types such as hotels, guest houses, backpackers and all other formal accommodation. In 2021 the share of Ethiopian tourists who stayed with friends and family fully recovered to the total recorded in 2019 (40, 970).
- Over the period under review, 2021 had the highest average length of stay, with the y-o-y growth more than double that recorded in 2020.

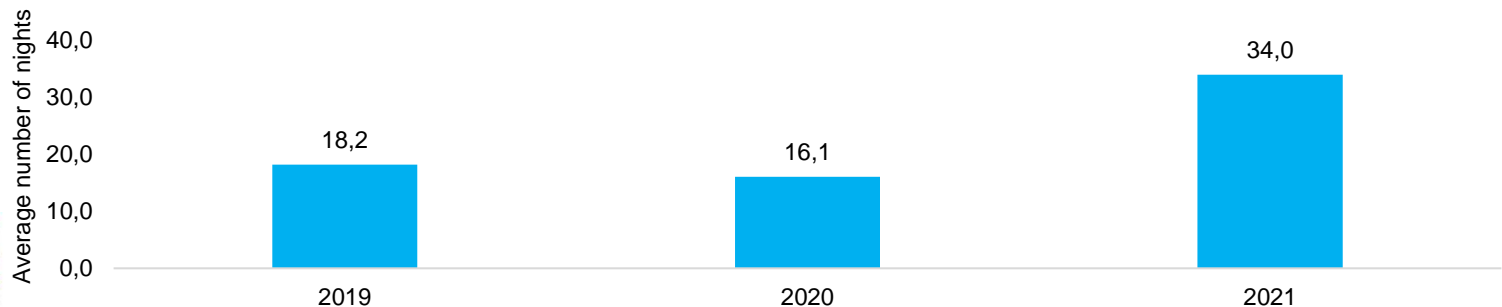
Top Reasons For Travel

2019	2020	2021
MICE - 24,4%	MICE - 36,5%	VFR - 21,8%
VFR - 22,8%	VFR - 19,8%	MICE - 19,4%
Holiday - 17,2%	Holiday - 12,3%	Holiday - 15,1%
Business traveller - 10%	Business traveller - 8,7%	Business traveller - 6,2%

Accommodation Usage

2019	2020	2021
Friends & Family - 40 970	Friends & Family - 7 654	Friends & Family - 50 948
Hotel - 23 689	Self- Catering - 6 686	Hotel - 7 333
Backpacker - 7 814	Hotel - 6 017	Self-Catering - 4 222

Ethiopian Tourists Average Length of Stay (2019 - 2021)



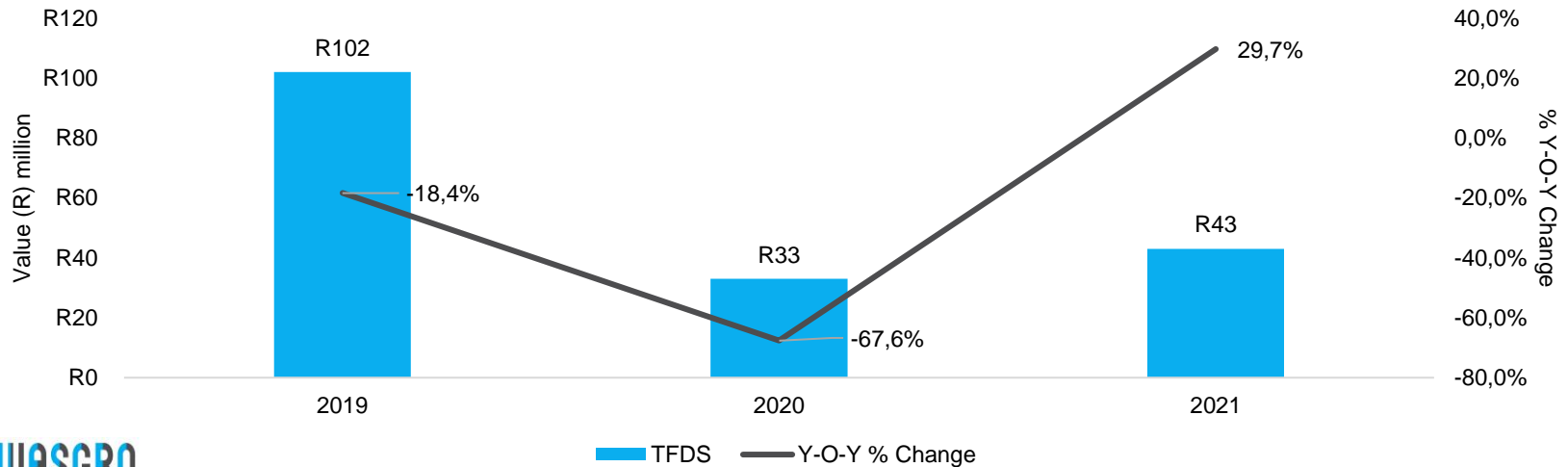
Ethiopian Travel Trends in South Africa

- Travelers from Ethiopia to South Africa are generally aged between 25 –50 years. In 2021 the highest share of travelers was from the 31 – 34 year age group.
- The Foreign Direct Spend (TFDS) value reached over R100 million in 2019, and a decline of -67,6% was seen in 2020. Spend by Ethiopian travelers to South Africa recovered modestly in 2021, with a 29,7% y-o-ty increase recorded.

Age of Respondents

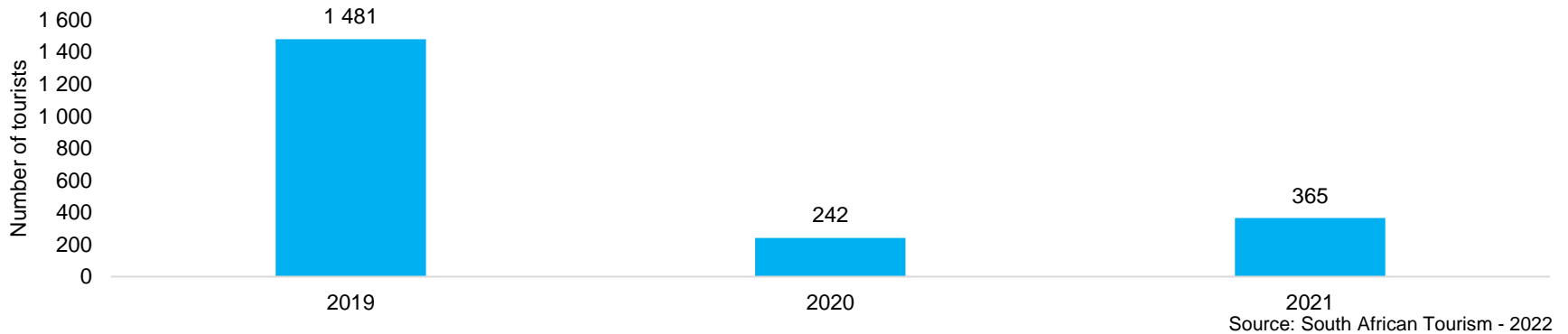
	2019	2020	2021
35 - 40 =	20,4%	22,1%	31 - 34 = 28,2%
41 - 50 =	18,5%	14,5%	41 - 50 = 16,7%
25 - 30 =	18,0%	10,9%	35 - 40 = 15,2%

Ethiopian Tourists Total Foreign Direct Spend (TFDS) 2019 - 2021



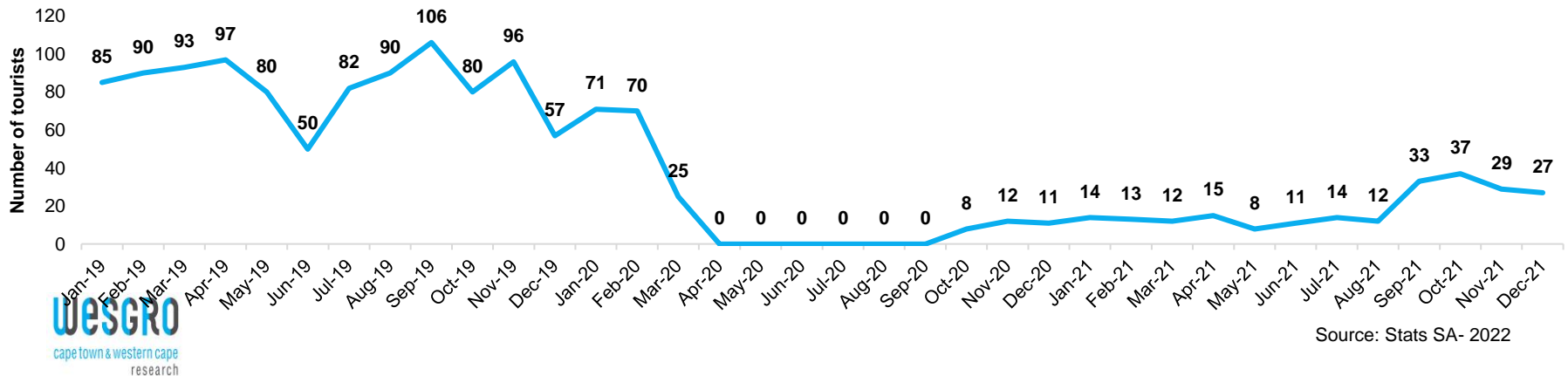
The Ethiopian Traveler to the Western Cape

Ethiopian Tourists to the Western Cape (2019 - 2021)



2 088 tourist arrivals from Ethiopia were welcomed into the Western Cape throughout the period under review. 1 481 of these visitors were received in 2019. Visitor numbers to the province declined by 84% in 2020 however as a result of the COVID-19 pandemic. In 2021 Ethiopian passenger arrivals at the Cape Town International Airport were positive compared to the 2020 performance. A high share of arrivals were over the spring season between September and November 2021.

Ethiopian Tourist Arrivals to Cape Town (via Air) , Jan 2019 - Dec 2021



An aerial photograph of a coastal road in South Africa. The road is a two-lane asphalt road that curves along the edge of a steep, rocky cliffside. The cliffside is covered in sparse, dry vegetation. The ocean is a deep blue, with white waves crashing against the rocks at the base of the cliff. In the background, there are several large, rugged mountains with flat tops, some of which are covered in green vegetation. The sky is bright blue with scattered white clouds.

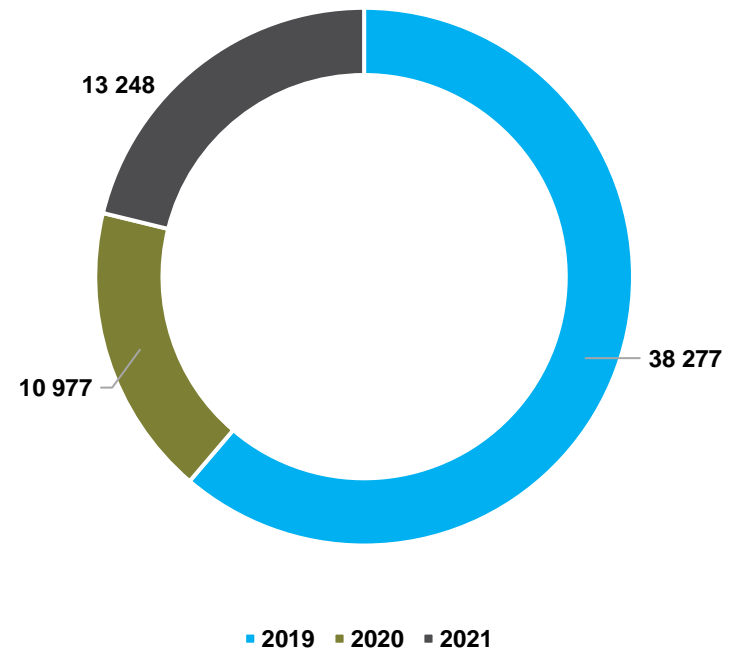
Tanzania 2019 - 2021

The Tanzanian Traveler to South Africa

According to the World Bank (2022), economic activity in Tanzania gradually recovered in the third quarter of 2021, with the surge mainly driven by the hospitality, mining, and electricity sectors.

The 2021 South African Tourism Annual Report notes that over the period under review 2019 – 2021, the highest number of Tanzania tourist arrivals to South Africa were recorded in 2019. However, sharp declines were seen in 2020, which recorded a 71.3% y-o-y decline in Tanzanian tourist arrivals to South Africa. Arrival numbers increased modestly by 20.7% y-o-y in 2021.

**Tanzanian Tourist Arrivals to South Africa
(2019 - 2021)**



Source: South African Tourism - 2022

Tanzanian Travel Trends in South Africa

- Tanzanian tourists to South Africa mainly visit their friends and relatives (VFR), and for business events namely Meetings, Incentives, Conferences & Events (MICE), although a shift was seen in 2021 with a higher share of holiday trips over MICE. In terms of accommodation, Tanzanian travelers prefer staying with friends and family or in self-catering venues as well as hotels and backpackers.
- In 2021 the average length of stay from the Tanzanian market was 22 nights; a positive increase of 16,6% when compared to the 18,9 nights recorded in 2020.

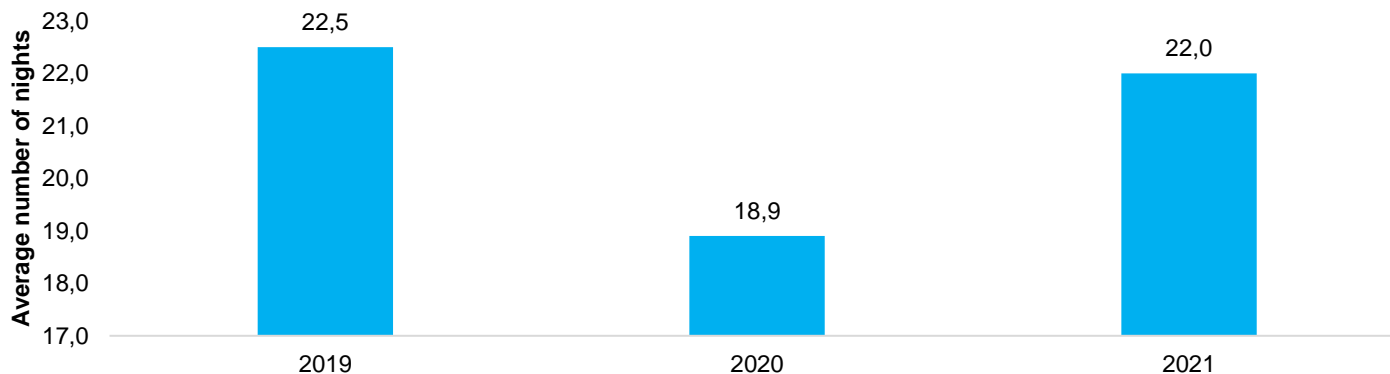
Top Reasons For Travel

2019	2020	2021
VFR - 20,4%	VFR - 23,2%	VFR - 33,3%
MICE - 16,6%	MICE - 22,3%	Holiday - 15,8%
Business traveller - 15,2%	Holiday - 12,4%	MICE - 13,7%
Holiday - 13,9%	Business traveller - 9,2%	Business traveller - 6,4%

Accommodation Usage

2019	2020	2021
Friends & Family - 143 478	Friends & Family - 32 913	Friends & Family - 54 017
Self-Catering - 77 056	Self-Catering - 22 449	Self-Catering - 27 679
Hotel - 47 923	Backpackers - 20 149	Hotel - 13 859

Tanzanian Tourist's Average Length of Stay (2019 - 2021)



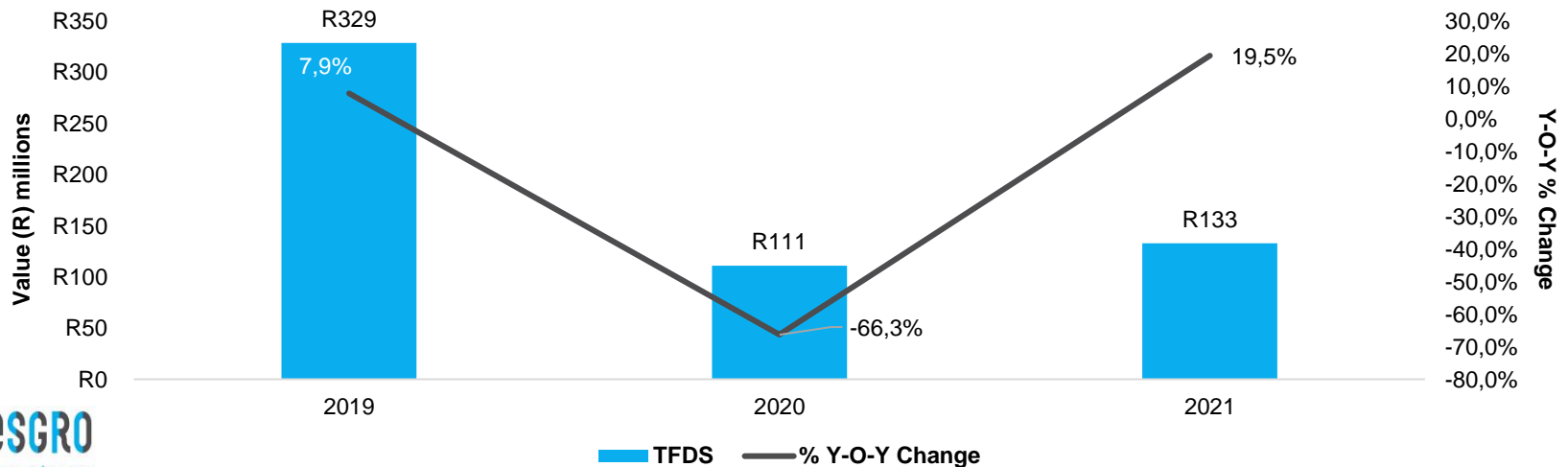
Tanzanian Travel Trends in South Africa

- Travellers from Tanzania to South Africa are generally aged between 25 –50 years. In 2021 the highest share of travelers was from the 25 – 30 year age group, followed by 41 – 50 year old's.
- The Total Foreign Direct Spend (TFDS) value by Tanzanian travelers to South Africa reached over R320 million in 2019, yet a decline of -66,3% was seen in 2020 as the impact of the global pandemic took hold. Spend recovered modestly in 2021, with a 19,5% y-o-y increase in value being spent by Tanzanian travelers to South Africa.

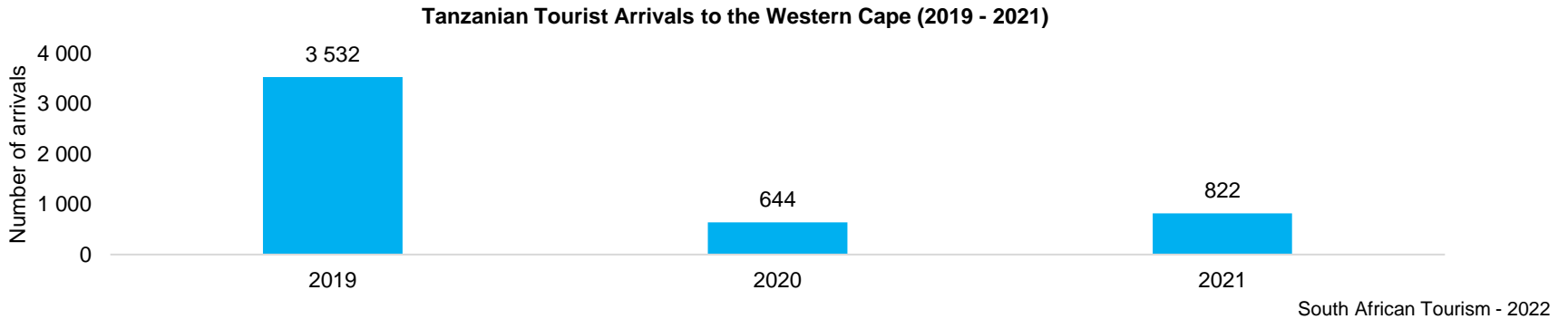
Age of Respondents

2019	2020	2021
25 - 30 = 27,8%	41 - 50 = 16,6%	25 - 30 = 24%
35 - 40 = 19,3%	35 - 40 = 16,3%	41 - 50 = 20,6%
41 - 50 = 17,8%	25 - 30 = 15,4%	31 - 34 = 17,7%

Tanzanian Tourist's Total Foreign Direct Spend (TFDS) 2019 - 2021



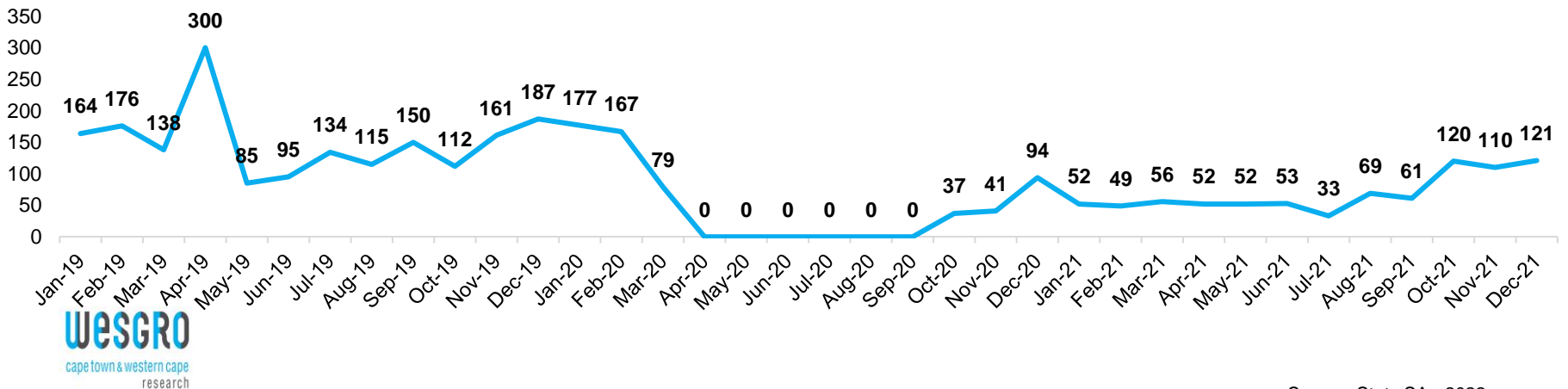
Tanzanian Traveler to the Western Cape



The highest number of tourist arrivals from Tanzania to the Western Cape was seen in 2019, however with the restrictions that were imposed in 2020 these numbers dropped dramatically, falling by 81,8% to reach a mere 644. A positive increase in numbers was seen again in 2021 with 822 tourist arrivals recorded in the Western Cape.

Tourist arrivals through Cape Town International Airport from Tanzania over the period 2019 – 2021, were generally highest over the Easter month of April as well as in the summer months of November, December and January.

Tanzanian Tourist Arrivals to Cape Town (via Air), Jan 2019 - Dec 2021



An aerial photograph of a coastal road in South Africa. The road is a two-lane asphalt road that curves along the edge of a steep, rocky cliffside. The cliffside is covered in sparse, dry vegetation. The ocean is a deep blue, with white waves crashing against the rocks at the base of the cliff. In the background, there are several large, rugged mountains under a bright blue sky with scattered white clouds. The overall scene is a beautiful coastal landscape.

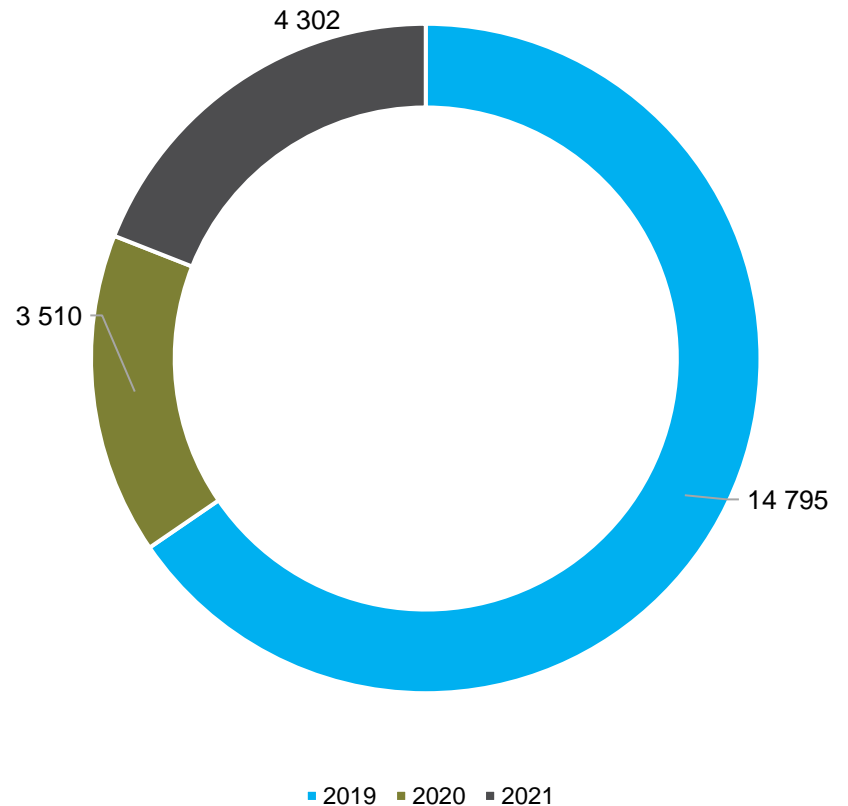
Uganda 2019 - 2021

The Ugandan Traveler to South Africa

The graph reflects Ugandan tourist arrivals into South Africa between 2019 to 2021.

While Ugandan tourist arrivals to South Africa increased modestly to 4 302 arrivals in 2021, this was notably lower than the 14 795 arrivals recorded pre Covid in 2019.

Ugandan Tourist Arrivals to South Africa (2019 - 2021)



Source: South African Tourism - 2022

Ugandan Travel Trends in South Africa

- Ugandan travelers to South Africa primarily visit their friends and relatives (VFR), and for holiday purposes. Euromonitor (2021) states that, as economic conditions improve, both international and domestic business travel will be revived, with 'bleisure' (a combination of business and leisure travel) which is a growing trend, particularly among international arrivals. This can also be seen in the current reasons for travel for Ugandan tourists to South Africa.
- In terms of accommodation, Ugandan tourists prefer staying with friends & family as tabled below. Average length of stay increased to 23 nights in 2021, notably higher than the 19,6 nights recorded in 2019.

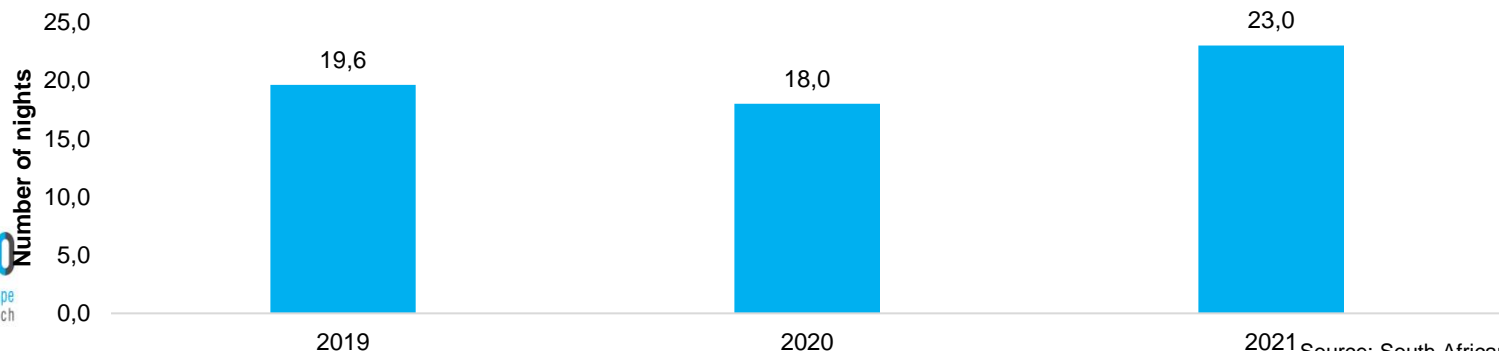
Top Reasons For Travel

2019	2020	2021
VFR - 30,2%	MICE - 29,4%	VFR - 29,6%
MICE - 14,5%	VFR - 22,3%	MICE - 21,5%
Holiday - 14,1%	Business traveller - 11,2%	Holiday - 20,8%
Business traveller - 7,8%	Holiday - 10,9%	Business traveller - 5,2%

Accommodation Usage

2019	2020	2021
Friends & Family - 115 794	Friends & Family - 21 113	Friends & Family - 33 500
Guest House - 29 988	Hotel - 7 999	Hotel - 8 343
Hotel - 29 549	Guest House - 5 181	Self-Catering - 4 381

Ugandan Tourist's Average Length of Stay (2019 - 2021)



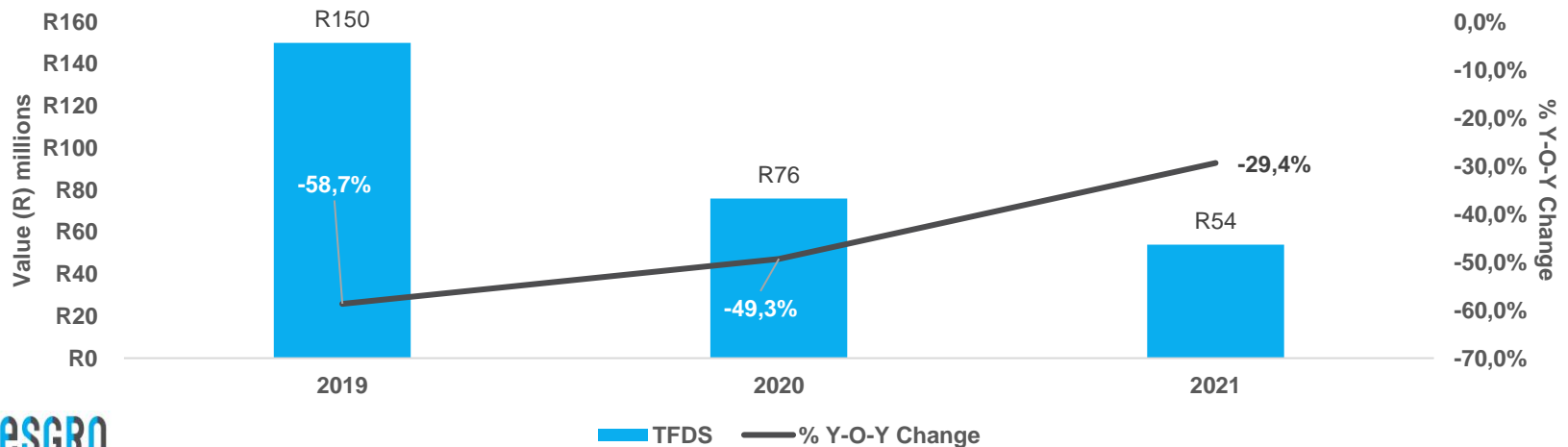
Ugandan Travel Trends in South Africa

- Travelers from Uganda to South Africa are generally aged between 18 –50 years. In 2021 the highest share of travelers was from the 25 – 30 year age group.
- The Foreign Direct Spend (TFDS) value reached R150 million in 2019 a decline from 2018 figures. The negative trend has continued throughout the period 2019-2021 with a decline of -29,4% seen in 2021.

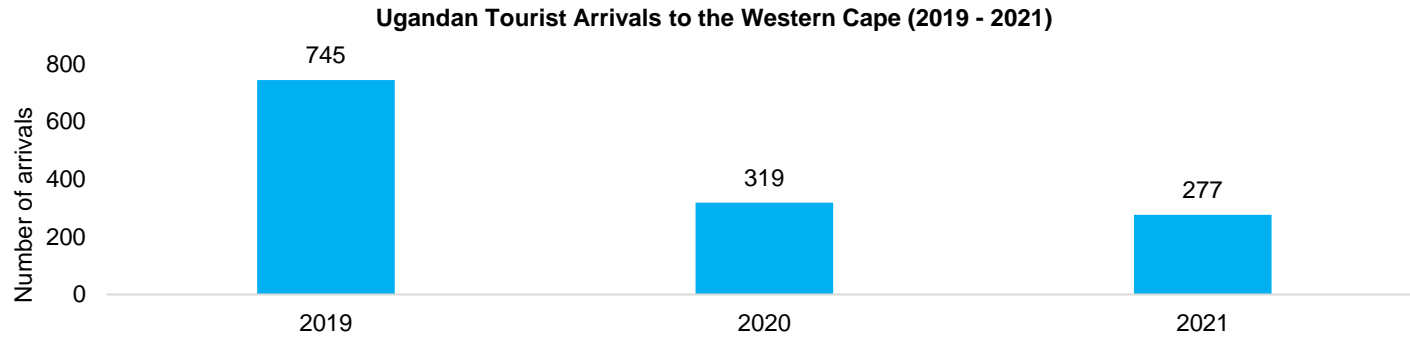
Age of Respondents

2019	2020	2021
25 - 30 = 28,9%	41 - 50 = 22,6%	25 - 30 = 21,4%
51 - 60 = 16,1%	35 - 40 = 14,5%	35 - 40 = 18,1%
41 - 50 = 15,7%	51 - 60 = 13,9%	41 - 50 = 17,5%

Ugandan Tourist's Foreign Direct Spend (TFDS) 2019 - 2021



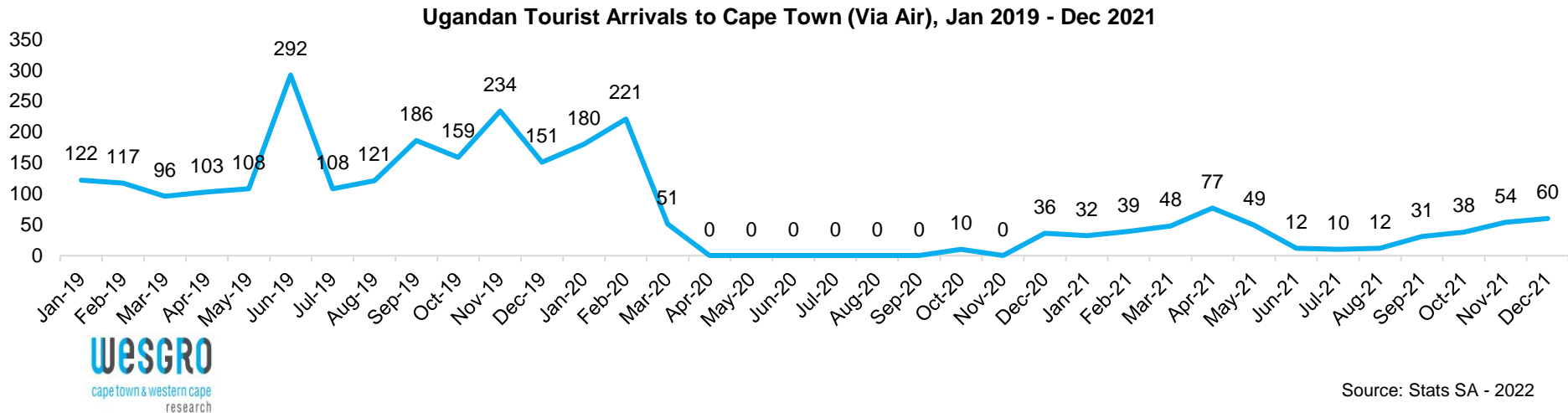
Ugandan Traveler to the Western Cape



South African Tourism - 2021

Ugandan tourist arrivals to the Western Cape declined consistently throughout the period under review (2019 – 2021) with the province receiving a total of 1 341 visitors over this three period, compared to the 1 625 tourists received in 2018.

A slow growth and recovery in passenger movement and arrivals into Cape Town International Airport (CTIA) was seen in 2021. CTIA welcomed 32 Ugandan tourists in January 2021 as compared to the 36 received in December 2020. April and May had the highest visitor numbers for the period.



Key Findings

South Africa welcomed over 140,000 tourists (2019 – 2021) from the select four East African countries reflected in this report. Tanzania held the highest share of arrivals for the period (2019 – 2021) with 62 502 arrivals, this was followed by Kenya (45 174), Uganda (22 607) and lastly Ethiopia (11 625). This was however not the same for arrivals into the Western Cape.

During the period (2019 – 2021) the highest arrivals welcomed into the Western Cape were from Kenya (8 323) followed by Tanzania (4 998), Ethiopia (2 088) and Uganda (1 341) respectively.

The trends seen in the report show that among the select East African countries reviewed, their most common reason for travel was led by those visiting friends and relatives (VFR) as well as for business and leisure.

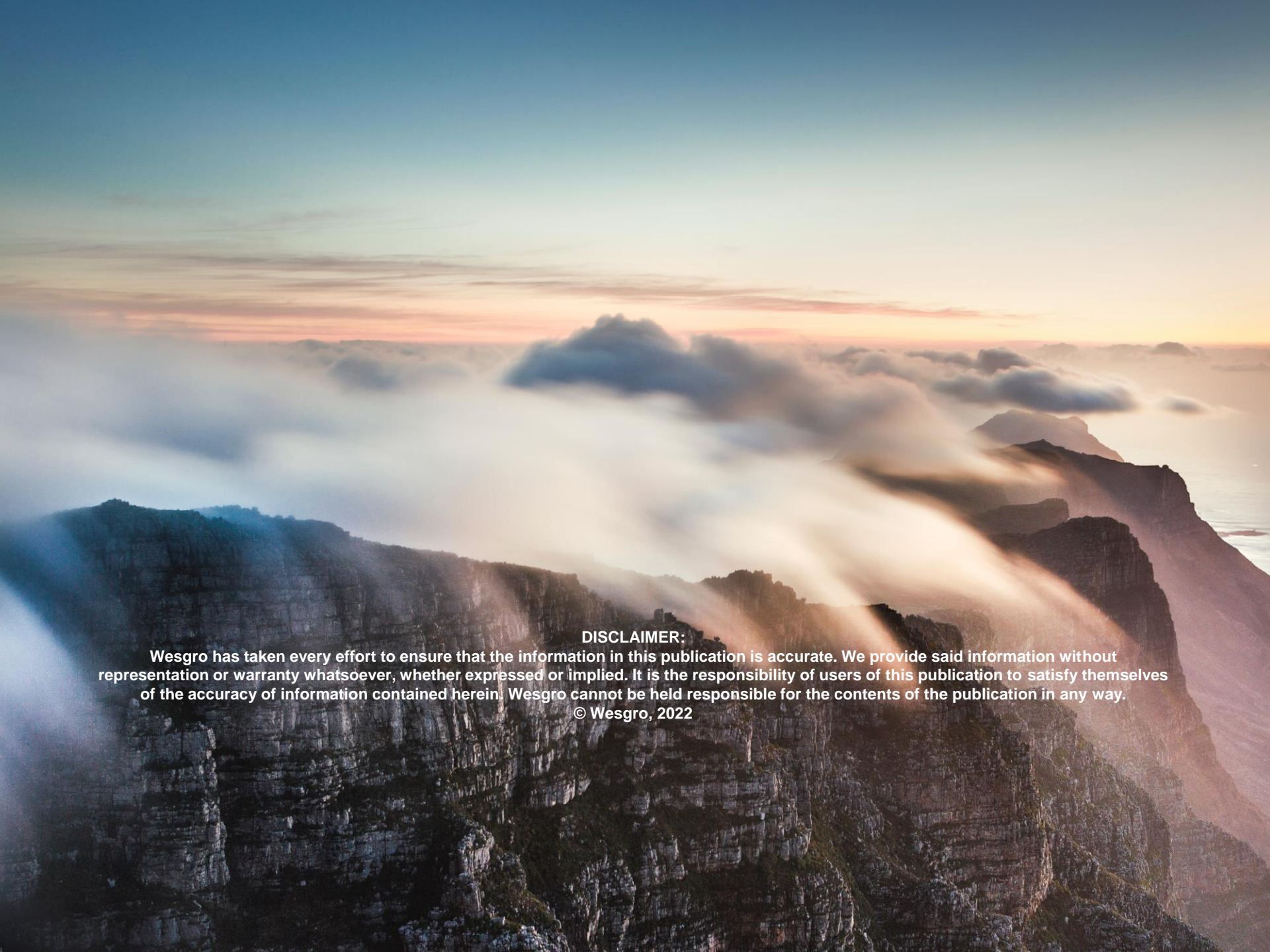
In 2019 over R900 million (TFDS) was spent in South Africa by these countries combined. Despite the decline in 2020, numbers have gradually risen in 2021 showing positive results in terms of tourism recovery for the region. In 2021, the highest spend was from Tanzania with an average TFDS of R133 million, a 19,5% increase when compared to 2020. This was followed by Kenya with R106 million spent, a 26,2% y-o-y growth.

In 2021, tourists from Uganda spent over R50 million in South Africa, however this was a -29,4% decline compared to their 2020 figures.

With respect to 2020/2021 y-o-y growth, Ethiopia recorded the highest increase for tourists coming to South Africa from the East African market as reflected by a number of metrics, including a 37,0% increase in arrivals, a 111,2% increase in average length of stay, and a 29,7% increase in TFDS.

References

1. South African Tourism (2022)
2. Tourism Flows In South Africa (Euromonitor, 2022)
3. World Bank (2022)
4. Stats SA (2019 – 2022)



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