



Africa Travel Trends into Kenya Middle Class Perspective

30th July 2015

The Tourism Brand Mix

Mandatories

Weather
People
Affordability
Safety (health, crime, terror)
Value for Money

Differentiators

Rest/relaxation
History and Culture
Activities for the entire family
Beaches
Dining
Natural Beauty
etc



Travel Motivations

Discovery

Escapism

Affinity

Delight



Purpose of Entry includes



- Business
- Conference
- Holiday
- Medical
- On Transit
- Religious Mission/Voluntourism
- Sports
- Study
- VFR – Visiting Friends and Relatives
- Others/Not stated

Data sorting is done by Country of Residence
NOT Nationality

NOT INCLUDED:

Kenyan residents, regardless of Nationality
Kenyan nationals domiciled in Kenya
On Transit Travellers who do NOT pass through
Immigration

Source : International Arrivals by Air and Sea: Kenya Tourism Board

Source: Cross-border Statistics: KNBS



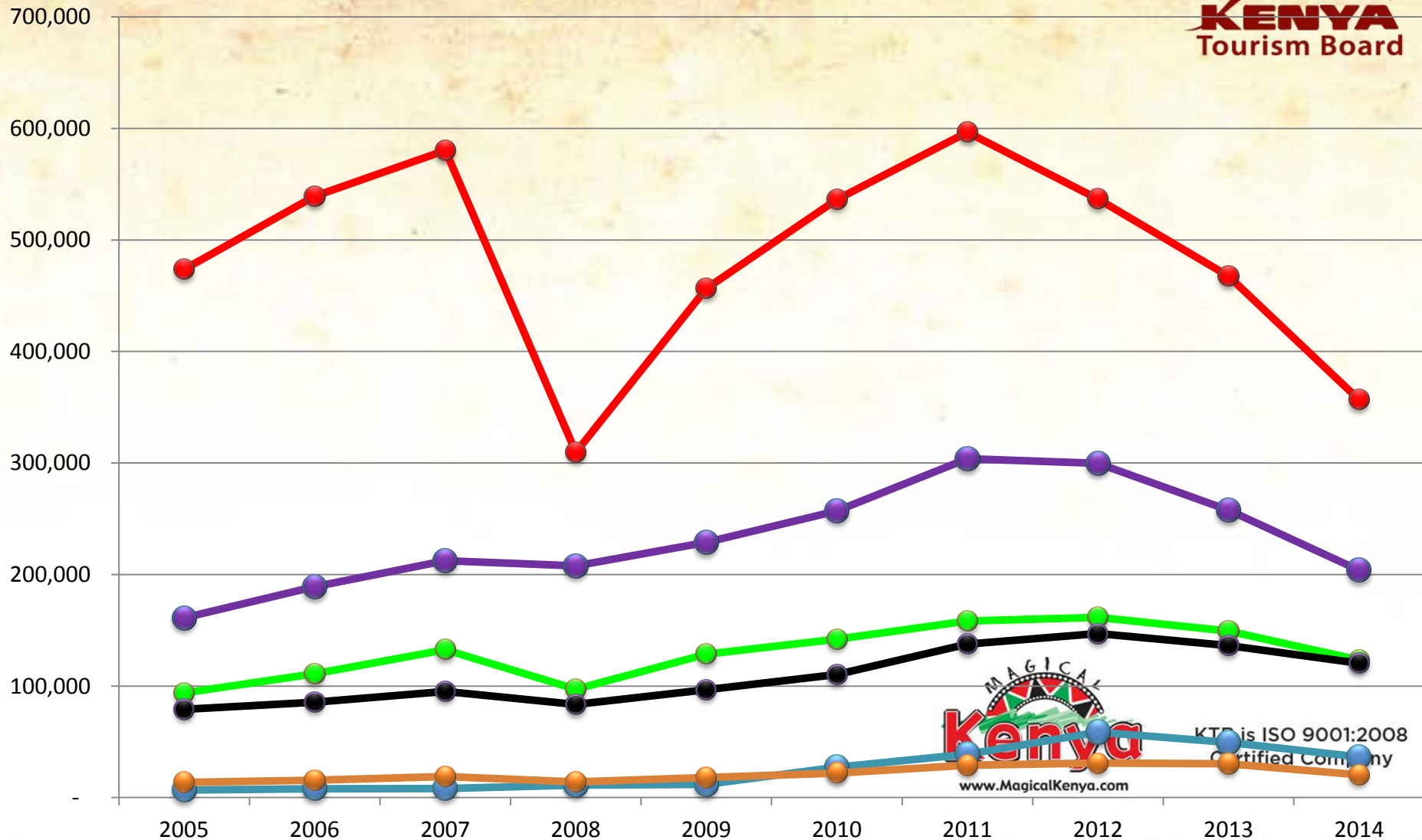
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Year	International	% Growth	Crossborder	% Growth	Total Arrivals	% Growth
Yr 2001	492,731		500,907		993,638	
Yr 2002	495,751	0.6%	505,529	0.9%	1,001,280	0.8%
Yr 2003	547,314	10.4%	598,788	18.4%	1,146,102	14.5%
Yr 2004	668,134	22.1%	692,566	15.7%	1,360,700	18.7%
Yr 2005	832,229	24.6%	646,771	-6.6%	1,479,000	8.7%
Yr 2006	954,335	14.7%	646,206	-0.1%	1,600,541	8.2%
Yr 2007	1,048,732	9.9%	768,225	18.9%	1,816,957	13.5%
Yr 2008	729,000	-30.5%	474,224	-38.3%	1,203,224	-33.8%
Yr 2009	952,481	30.7%	537,967	13.4%	1,490,448	23.9%
Yr 2010	1,095,842	15.1%	513,836	-4.5%	1,609,678	8.0%
Yr 2011	1,265,136	15.4%	520,246	1.2%	1,785,382	10.9%
Yr 2012	1,236,024	-2.3%	544,744	4.7%	1,780,768	-0.3%
Yr 2013	1,091,095	-11.0%	428,505	-21.0%	1,519,600	-14.7%
Yr 2014	861,758	-21.0%	488,970	14.0%	1,350,728	-11.0%

Inbound Regional Travel Trends 2005 - 2014

● Europe ● Africa ● Americas ● Asia ● Middle East ● Oceania



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Regional Contribution to Arrivals

Europe

Africa

Americas

Asia

Middle East

Oceania

2014

41%

24%

14%

14%

4%

2013

43%

24%

14%

13%

5%

2012

43%

24%

13%

12%

5%

2011

47%

24%

13%

11%

3%

2010

49%

23%

13%

10%

2%

2009

49%

24%

14%

10%

1%

2008

43%

29%

13%

12%

2%

2007

55%

20%

13%

9%

1%

2006

57%

20%

12%

9%

1%

2005

57%

19%

11%

10%

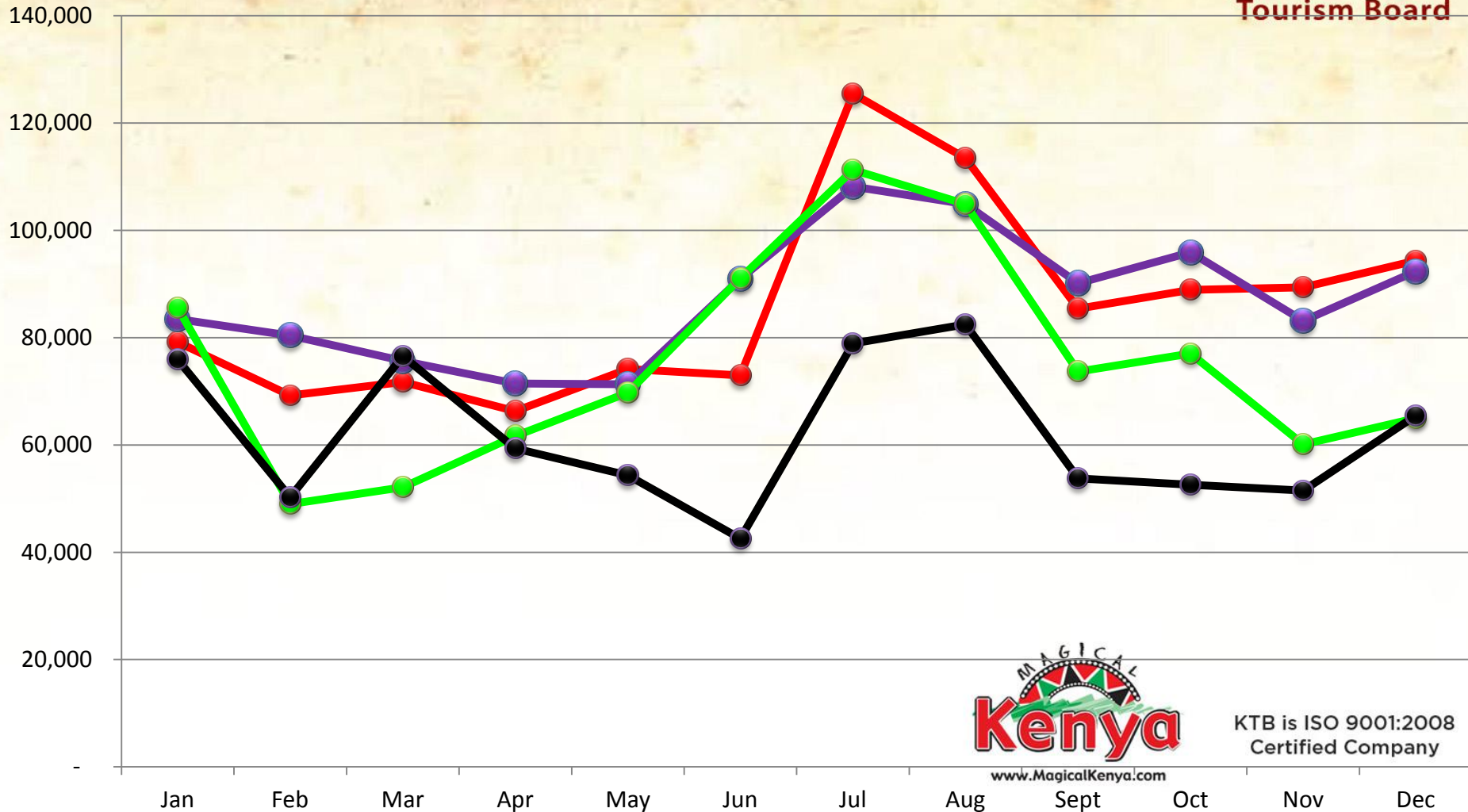
1%

1,800,000

JKIA Arrival Trends 2011 - 2014



● 2011 - 1,030,436 ● 2012 - 1,047,816 ● 2013 - 901,145 ● 2014 - 743,600

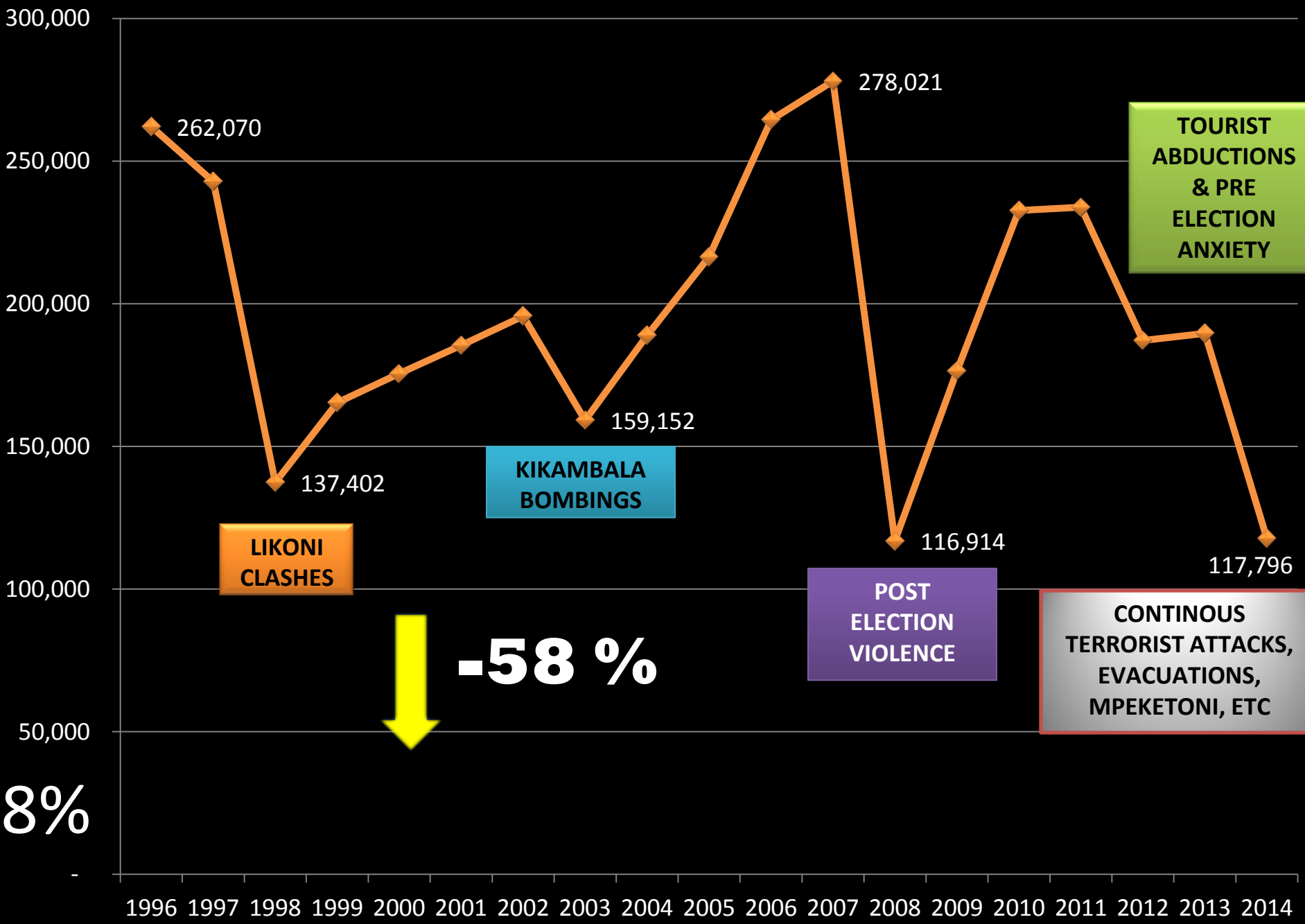


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970,000

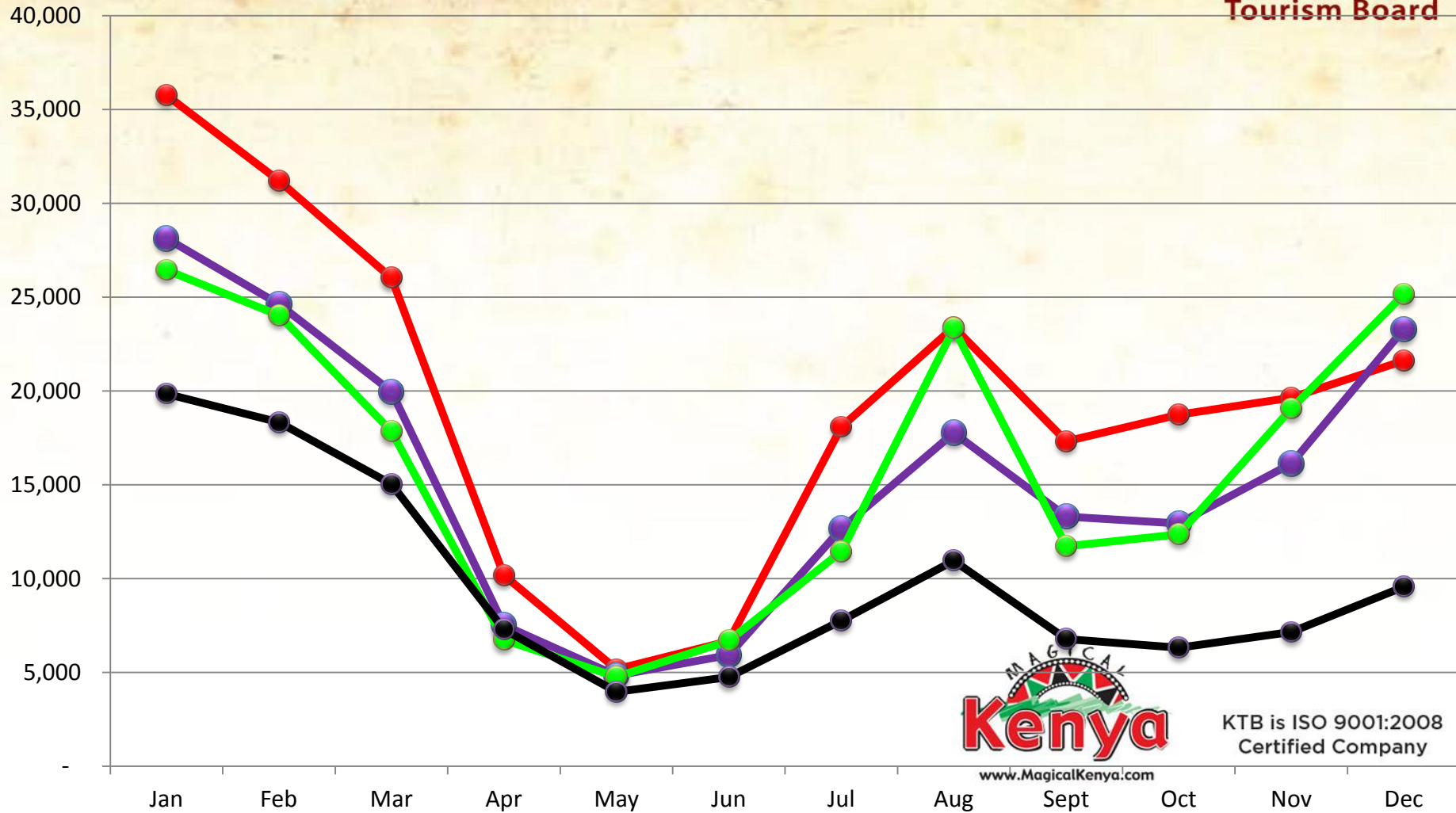
Why the Coast is suffering....



8%

MIAM Arrival Trends 2011 - 2014

● 2011 - 233,844
 ● 2012 - 187,151
 ● 2013 - 189,632
 ● 2014 - 117,796

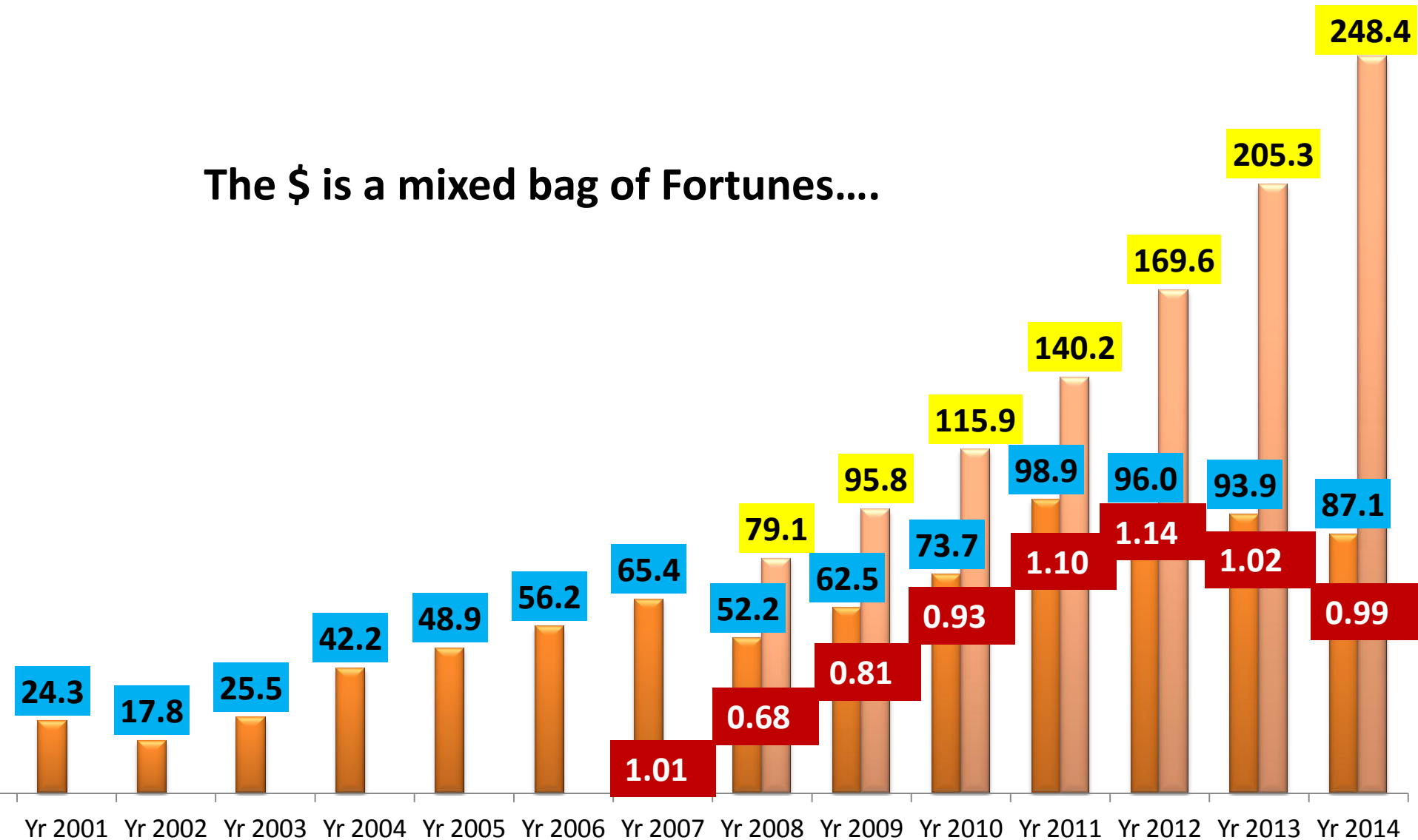


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Tourism Receptits 2001-14

The \$ is a mixed bag of Fortunes....





Mama Africa



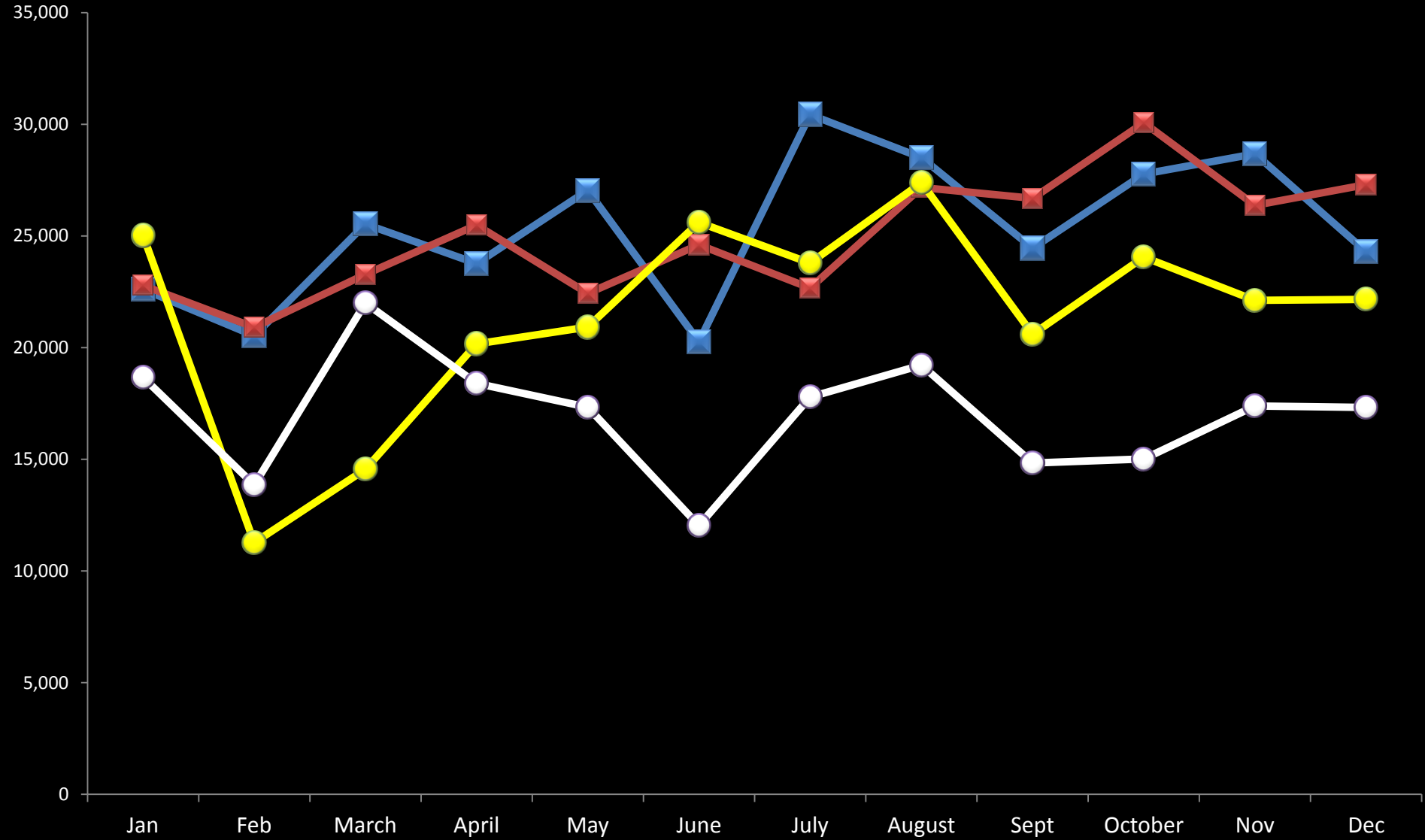
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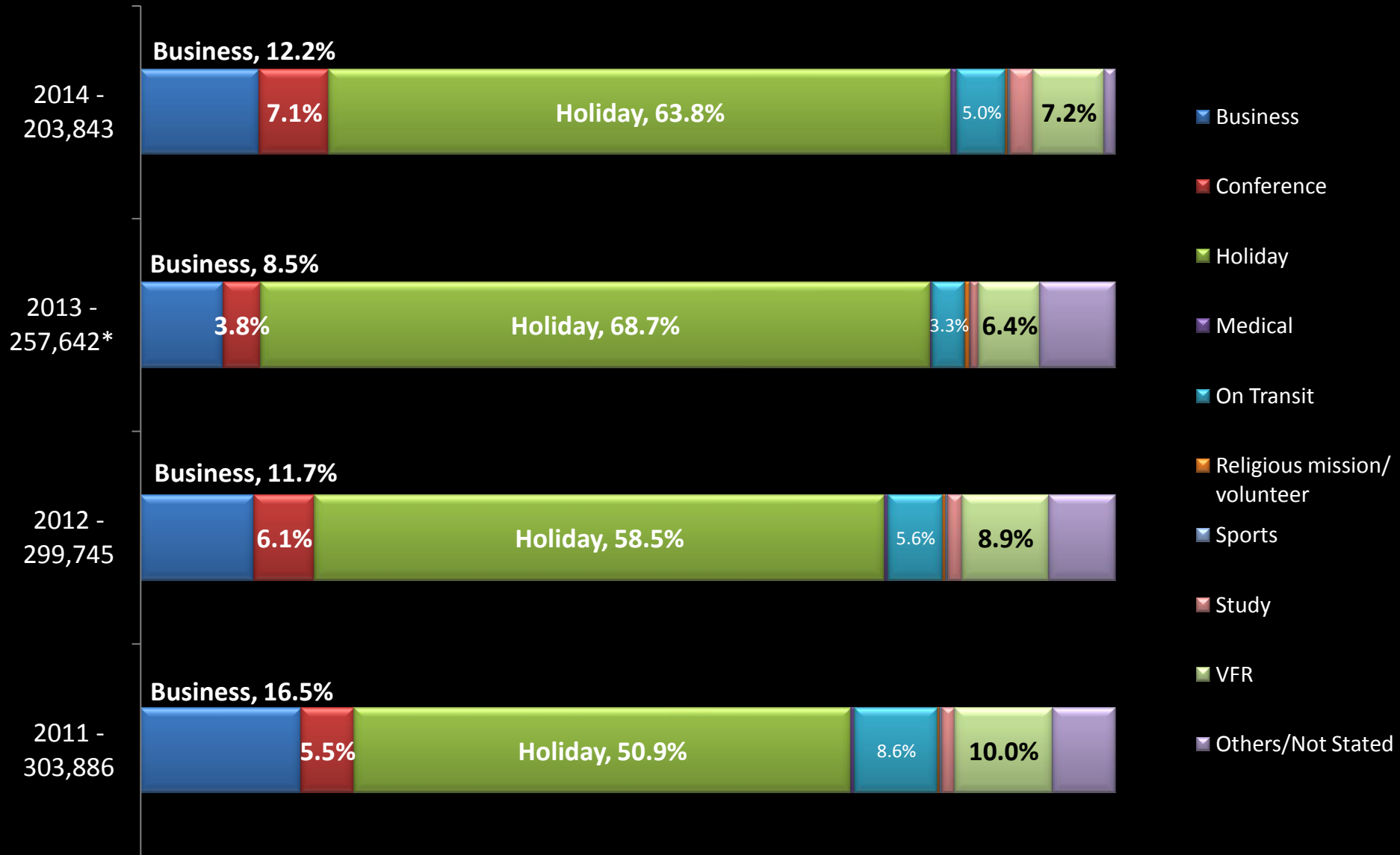


Africa Arrival Trends

■ 2011 - 303,886 ■ 2012 - 299,745 ● 2013 - 257,642 ● 2014 - 203,843



Arrivals by Purpose - Africa



TOP TEN PERFORMING MARKETS



	2011 - 303,886		2012 - 299,745		2013 - 257,642		2014 - 203,843	
1	UGANDA	42,674	UGANDA	55,449	UGANDA	47,398	UGANDA	31,586
2	SA	38,353	SA	40,703	SA	36,405	SA	25,931
3	TANZANIA	34,322	TANZANIA	33,309	TANZANIA	28,561	TANZANIA	21,460
4	SUDAN	22,124	NIGERIA	15,029	RSS	16,218	RSS	18,276
5	NIGERIA	16,811	SUDAN	14,444	NIGERIA	13,813	NIGERIA	13,271
6	RWANDA	13,667	RWANDA	13,658	RWANDA	13,347	RWANDA	11,388
7	ETHIOPIA	13,501	ETHIOPIA	12,308	ETHIOPIA	11,519	ETHIOPIA	10,641
8	DRC	10,236	DRC	12,181	BURUNDI	7,184	BURUNDI	6,199
9	ZIMBABWE	9,053	RSS	10,397	SUDAN	6,951	GHANA	5,847
10	GHANA	9,032	ZIMBABWE	8,630	DRC	6,633	ZIMBABWE	5,551
	% Contribution	69.0%		72.1%		73.0%		73.7%



Some Insights...



Concerns...



...In 2010, Security was still the most important factor for visitors, however, Kenya was not able to meet expectations in terms of being a safe destination



GAP ANALYSIS 2010

	Importance of Factors in Decision to Visit	Satisfaction with Aspects of Visit	Gap (Difference between Satisfaction and Importance)
Security	8.43	7.78	0.65
Ease of getting around	7.78	7.36	0.42
Political stability	8.13	7.94	0.19
Value for money	7.9	7.83	0.07
Night life	5.63	5.91	-0.28
Art and culture	7.85	8.13	-0.28
Natural beauty	8.62	8.98	-0.36
Previous experience	6.67	7.05	-0.38
Availability of good accommodation	8.12	8.51	-0.39
Distance	6.07	6.5	-0.43
Friendliness of the people	8.4	8.88	-0.48
Climate	7.81	8.49	-0.68
Type of holiday package offered	7.62	8.33	-0.71
Culinary experience/food/dining	-	-	
Attractions	-	-	

Base n=1041

Q. to what extent would you say each of the following attributes are to you on a scale of 1 to 10? And how satisfied are you with your experience in Kenya considering each of these attributes



Security is the most important factor taken into consideration while choosing a travel destination for leisure. However, Kenya is scoring poorly on security which is a key driver for tourists when selecting a destination



GAP ANALYSIS 2015

	Importance of Factors in Decision to Visit	Satisfaction with Aspects of Visit	Gap (Difference between Satisfaction and Importance)
Security	8.33	6.98	1.35
Political stability	7.66	6.84	0.82
Ease of getting around	7.17	6.48	0.69
Value for money	7.46	7.18	0.28
Natural beauty	8.29	8.64	-0.35
Availability of good accommodation	7.49	7.87	-0.38
Culinary experience/food/dining	7.17	7.67	-0.5
Art and culture	6.78	7.33	-0.55
Friendliness of the people	8.04	8.6	-0.56
Attractions	7.34	7.9	-0.56
Previous experience	6.46	7.17	-0.71
Climate	7.17	8.22	-1.05
Type of holiday package offered	6.15	7.2	-1.05
Distance	4.81	5.96	-1.15
Night life	4.25	5.93	-1.68

Base n=928

16. How important are the following factors to you in choosing a travel destination for leisure/holiday?



and diseases such as



KENYA
Tourism Board

KENYA
Tourism Board



Base n=928



KEY CONCERNS FOR EUROPEAN VISITORS WHILE PLANNING TO VISIT KENYA



Security remains a key concern even for African visitors when planning to come to Kenya



KEY CONCERNS FOR VISITORS FROM AFRICA WHILE PLANNING TO VISIT KENYA



Base n=200

African & Indian Ocean Sample Only



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38. While making your travel plans, what were some of your concerns, if any, regarding travelling to Kenya?



Neno Moja...



Kenya is described as a beautiful country with friendly people by visitors



KEY WORDS THAT DESCRIBE KENYA - ALL VISITORS



Base n=928
Total Sample



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Q42 What is the ONE word you can use to describe Kenya?



g country



KENYA
Tourism Board

KENYA
Tourism Board



EUROPE n=414



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Q42 What is the ONE word you can use to describe Kenya?



ndly country.



KENYA
Tourism Board

KENYA
Tourism Board



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Challenges to African Middle Class Travel

- Airline costs
- Visa restrictions
- Unfriendly Currencies
- Knowledge Gap
- Poor Road networks



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THEN WHAT?

1. Is middle class the same as middle income? Or a lifestyle?
Or a belief?
2. In order to target the right market segments to sell the tourism agenda, to what extent will classifications such as ABC1C2D or LSM apply in defining the Africa middle class?
3. What role will growth of SMEs and Women inclusion contribute to the rise of middle class in Africa?
4. Is Africa middle class more of a reality or a promise?



Asante Sana!

Michael Riungu – Kenya Tourism Board
Boniface Ngahu – SBO Research



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NB: Reuse of this data should be authorized by KTB first.

