TOURISM RESEARCH INSTITUTE

Kenya-Tourist Exit Survey (TES)
Final report 2019

AUGUST-SEPTEMBER, 2019

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LIST OF ABBREVIATIONS

ERSWEC	Economic Recovery Strategy for Wealth and Employment Creation
GoK	Government of Kenya
JKIA	Jomo Kenyatta International Airport
KAA	Kenya Airports Authority
KNBS	Kenya National Bureau of Statistics
MIA	Moi International Airport
MTW	Ministry of Tourism and Wildlife
NACOSTI	National Council of Science and Technology
RA	Research Assistant
SPSS	Statistical Package for Social Sciences
TES	Tourist Exit Survey
ToR	Terms of Reference
TRI	Tourism Research Institute
TSA	Tourism Satellite Account

KEY TERMS AND DEFINITIONS

Visitor - A visitor is any person travelling to a place other than his/her usual environment and staying there for not longer than one consecutive year and whose main purpose of travel is other than the exercise of an activity remunerated from within the place visited. The term visitor (domestic and international) comprises tourists and same-day visitors.

Tourist – A person traveling to and staying in places outside their usual environment for at least a night and no more than one consecutive year for leisure, business and other purposes, other than taking up employment.

Excursionist – This is a same-day visitor, or day-tripper or person who stays in a destination for less than 24 hours.

Transit visitor – A visitor passing-by or crossing a region which is neither the region of origin nor the region of destination.

Tourism Expenditure - Tourism expenditure refers to the total consumption made by a visitor, or on behalf of a visitor for goods and services during his/her trip and stay at the destination place (country). It also includes payments in advance or after the trip for services received during the trip.

Tourism Product - A combination of tangible and intangible elements, such as natural, cultural and man-made resources, attractions, facilities, services and activities around a specific centre of interest which represents the core of the destination marketing mix and creates an overall visitor experience including emotional aspects for the potential customers. A tourism product is priced and sold through distribution channels and it has a life-cycle.

Source Market – this is a visitor's country of usual residence.

Outbound Tourism - Comprises the activities of residents of a given country travelling to and staying in places outside their country of usual residence for not more than one consecutive year for leisure, business and other purposes, other than taking up employment.

Inbound Tourism – Comprises the activities of non-residents coming into another country for not more than one consecutive year for leisure, business and other purposes, other than taking up employment

Tour Operator – This is a tourism company which arranges and assembles tours that are sold through travel agencies or directly to tourists. The tours may include any or all of the following:

transportation, accommodation, food, visits to museums, historical or cultural sites, theatrical, musical or sporting events.

External Tour Operator – This is a foreign registered tourism company which arranges and assembles tours that are sold through travel agencies or directly to tourist. The tours may include any or all of the following: transportation, accommodation, food, visits to museums, historical or cultural sites, theatrical, musical or sporting events.

Tourism Satellite Account (TSA) – This is the conceptual framework on the Measurement of the Economic Impact of Tourism.

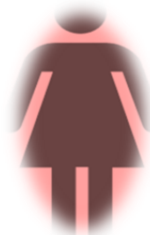
KEY FINDINGS

Demographic

Age

35-44- 30%
Others- 70%

Female



49%

Male

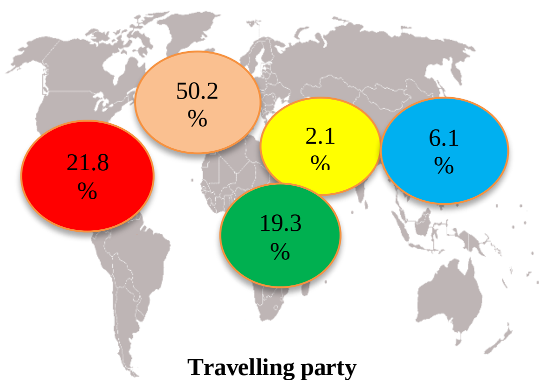
51%

Level of education

University - 44%
Others 66%

Purpose of visit

Holiday - 58.3%
Others- 41.7%



Travelling party

36.1%

Others- 38.4%

25.5%

Trip activity

60.5%

23.8%

EXECUTIVE SUMMARY

A Tourist Exit Survey (TES) is a critical source of information with respect to measuring and monitoring of key indicators in the tourism sector. The specific objectives of the August/September 2019 were to: 1) obtain demographic information on visitors to Kenya; 2) get to know tourist motivation and purpose of visit; 3) obtain direct feedback from the visitors on their experiences in and perception of the country; 4) obtain information on the travel and expenditure patterns of visitors; 5) obtain information on requirements and use of various tourist facilities and services e.g. accommodation, activities and transportation; 6) obtain information on level of trip satisfaction and future intentions; and 7) anecdotal comments from visitors in order to inform: planning, policy formulation, tourism marketing, service provision and delivery, tourism activities and value addition and regulation in the tourism sector.

Permission was secured to conduct surveys at two departure points, JKIA (Nairobi) and MIA (Mombasa) with a projected target of 5,430 questionnaires were distributed to non-resident visitors at the two exit points (4,930 - JKIA + 500 - MIA) within a period of 14 days. Out of 4930 non residence visitors at JKIA, 3000 were found to be fully completed and useful for analysis (60.8% success rated), and for MIA, 492 were fully completed and useful for analysis (98.4% success rated). In total 3,492 tourists were interviewed from August 26 thru September 9, 2019. Questionnaire survey was developed with the assistance of TRI who provided technical support.

Two lead consultants conducted this manual exit survey with the help of eight (8) research assistants and one (1) supervisor at JKIA; and three (3) research assistants and one (1) supervisor at MIA. A researcher intercepted tourists randomly at each exit points, explained the purpose of the exercise and the purposely selected visitors were given a self-administered questionnaire, filled and handed-over to the RA, coded and subsequently transferred to SPSS for analysis and interpretation. A pilot survey was conducted at JKIA and MIA simultaneously on 25th August, 2019. The data collected during the pilot was analyzed and the results used to fine tune the final survey instrument.

Survey indicated that holiday/leisure was the primary purpose of inbound tourists visiting destination Kenya (58.3%) and purposely engaged in wildlife viewing (60.5%). Country of residence seems to be a good indicator of inbound tourists; residents of USA (14.8%) and UK (12.8%) compared to nationality - Americans (12.8%) & British (11.5%). The top 8 countries exiting destination Kenya took 60.5% of the total inbound market share. Technology was the main source of information (42.8%) for decision making. However, residents of Italy still use travel agencies (60.6%) more than any other single information sources for trip planning. Generally 69.7% of all dollars were spent on holiday/leisure and a parity 3.19% was spent on conferences. The survey indicated that 61.8% of inbound tourists were away from their usual residence between 5 and 21 days but 53.9% spent their time in Kenya. Exiting tourists planned their trips 1 – 6 months (47.8%) before their time of travel, and travel arrangements remained the preserve of travel agencies in/outside Kenya (42.6%). Kenya Airways (KQ) was the airline of choice (24.4%)

though it did not operate direct flights to international destinations from Mombasa International Airport. Tour vehicles (39.1%) were the main mode of travel in destination Kenya and about 4 in 10 samples were either in packaged or non-packaged travel arrangements and the majority (52.8%) of the sample slept in hotels. Independent travelers dominated (36.1%) travelling party composition. Tourist Level of satisfaction was generally high led by tourist attractions (75.0%). Wildlife stands out as the most liked tourism product (53.6%) followed by culture (24.7%) and almost a fifth of the tourists liked friendly Kenyan people. There was strong evidence (71.3%) that departing tourists were likely to very likely revisit the country and about 3/4 were overally satisfied or very satisfied with destination Kenya.

CHAPTER 1: INTRODUCTION AND BACKGROUND

1.0 Background

Kenya is one of the leading tourism destinations in Africa. International tourism arrivals in Kenya increased from 1.037 million tourists in 2000 to 2.025 million in 2018 (Kenya National Bureau of Statistics (KNBS), 2001; Ministry of Tourism & Wildlife (MTW), 2018). Meanwhile, tourism receipts rose from Kshs. 119.9 billion in 2017 to Kshs. 157 billion in 2018, giving an annual growth rate of approximately 31.26% (MTW, 2018). Kenya is heavily dependent on tourism as a source of revenue for central government and a variety of other county government authorities. Consequently, the tourism industry has continued to feature prominently in policies, plans and programmes for Kenya's economic growth. In fact, the tourism sector in Kenya played a significant role towards the realization of the goals set out in the Economic Recovery Strategy for Wealth and Employment Creation (ERSWEC, 2003-2007; Kenya government-GoK, 2004). Since independence, Kenya has continued to significantly rely on two forms of tourism; beach tourism and safari tourism (Akama, 2013). However, Kenya Vision 2030, highlights some of the key tourism initiatives that will assist in raising the national GDP growth rate to 10% per annum, which include: Development of Resort Cities; Niche Tourism Products; Meetings, Incentives, Conferences and Exhibitions (MICE) and Premium Parks Initiative (GoK, 2012).

Kenya's Tourism industry requires detailed, up-date, and reliable visitor information to enable stakeholders to make information-based planning; development, marketing and customer service decisions. Furthermore, a lack of tourists' data can present a misleading impression to the public, business and governments as to the value of the tourism industry. Data sources that are rich in scope and reliability are invaluable to a large number of users. As a result a survey of visitors to the Republic of Kenya was conducted by Citilink Solutions Ltd, and sought to provide detailed, up-to-date, and reliable information about visitors who visit the country to enable stakeholders make evidence-based strategic decisions regarding planning, marketing, policy making, and regulation within the tourism sector. The exercise in part seeks to provide research for long-term sustainability of tourism in Kenya. The objective of the survey was to obtain detailed information about tourist expectations, satisfaction and perceptions about destination Kenya. The survey questionnaire was designed to provide the industry with evidence-based information to enable them make evidence-based decisions. Indeed, the findings from this tourist exit survey, provides useful information on: who visits Kenya, their place of origin, travel characteristics, estimated total expenditures and future intentions. It is expected the findings of this survey will benefit the public and private sector in strategic planning for tourism infrastructure and development, provision of visitor products, activities and amenities, and to better market tourism products/services to meet the needs of the travelling public.

Tourism product is made up of a range of objects such as transportation, accommodation & amenities, and attractions; each of these was included in the survey. The decision about which objects to include was made following pilot testing of the questionnaire and consultation with some members of the TRI. Thus, the final questionnaire comprised 29 questions measuring the three dimensions for each tourism object. The questionnaire also measured visitor satisfaction with a range of activities and services, expenditure, and details

1.1 Survey objectives

The survey was designed to:

i. Determine the demographic characteristics of respondents, including; Nationality, country of residence, gender, age and education
ii. Establish the sources of information and search habits; and awareness about destination Kenya; motivation and decision making process
iii. Establish tourist trip characteristics such as length of stay, mode of accommodation, tourist activities undertaken, size of the travel party and booking mode
iv. Establish the tourists satisfaction levels with various destination Kenya attributes including attractions, amenities, accommodation, accessibility and quality of services
v. To determine tourism products' strengths and weaknesses, and potential for repeat visitation
vi. Generate recommendations and lessons learned

1.2 Terms of Reference (ToR)

The terms of reference included the following:

i. To review studies on customer satisfaction in general, tourists satisfaction and tourists expenditure trends
ii. To develop a methodology on how best to capture the required information and data
iii. Develop appropriate tools to be used for the survey to capture both qualitative and quantitative information
iv. Distribute data collection instruments to the targeted respondents and collect the required data
v. Review and analyze the data collected and produce an exit survey report on the following:
    - Demographic characteristics of tourists
    - Pre-visit perceptions and expectations
    - Actual tourists experience
    - Post visit perceptions
    - Tourists satisfaction levels
    - Estimated tourists expenditure
    - Recommendations
vi. Provide recommendations and practical action plan that TRI can use to advise the Ministry of Tourism and other key tourism stakeholders to undertake

vii. Present the final exit survey report to TRI

1.3 Tourist Exit Survey Outputs

The following survey results were achieved for proper policy, planning, marketing, tourism infrastructure development and service provision:

i. Visitor survey tools/instruments were found to be sufficient;
ii. Tourists demographic characteristics (nationality, country of residence, age, gender and level of education) were established;
iii. Tourists trip characteristics (purpose of visit, first time or repeat visit, frequency of visits, means of transport used, accommodation used, activities undertaken, tourists' length of stay, sources of destination awareness) were established;
iv. Estimated tourists' expenditure were established;
v. Tourists' satisfaction with their visit (tourists' interests, expectation, experience, perceptions, satisfaction, future intensions, tourists' suggestions and comments about destination Kenya) were established;
vi. Recommendations would not be realized because this was the first TES, and the study only took 14 days, therefore there was no best practices for reference, and could not be possible to establish a trend based on 14 days.

CHAPTER 2: METHODOLOGY

2.0 Introduction

The methodological process and activities involved the use of structured questionnaires, data analysis and report writing. The paper questionnaires were administered to sampled tourists in JKIA and MIA from 26th August, 2019 through 9th September, 2019. However, before the exercise commenced, a pilot survey was conducted on the 25th August 2019. The questionnaires were designed to collect information on tourists' demographic characteristics; trip characteristics; overall expenditure; experiences and satisfaction; and future intentions **(Annex 1)**. The questionnaire was translated into other languages including; **German, French, Chinese,** and **Italian** for ease of understanding by the tourists.

2.1 Sample size

According to KTB records **(Jan-June, 2019)** on inbound tourists, **633,731** and **63,337** entered the country through JKIA and MIA respectively, while same period 2018 JKIA - 604,298 and MIA – 53,446 an increase of 4.9% JKIA and 18.5% MIA. This means that approximately **105,621** and **10,556** tourists departed Kenya through JKIA and MIA per month (2019) respectively. The sample population was 105,621 (JKIA) and 10,562 (MIA) and the sample size was approximately 10% of 105,621 per month (10,562), which translated to 4,929 tourists for 14 days JKIA and about 10% of 10,556 per month (1,055), which translates to 492 tourists for 14 days MIA. Purposively selected tourists were asked a series of screening questions by the RAs, which included the following: Are you currently living in Kenya?; Did you visit Kenya just for today?; Do you usually visit Kenya once a week or more often?; Were you employed by a Kenyan Company or an individual during your stay? If **Yes** to any one or all questions, the visitor is a non-tourist and thus, disqualified. Thus, the population of interest was non-Kenyan residents had spent at least one night in Kenya at the time of contact. Eligible and conveniently selected tourists were given self-administered questionnaires by the RAs, who then explained the purpose of project and requested the visitors to fill them. Each questionnaire took 10-15 minutes to complete. A total of 4,930 and 500 questionnaires were administered at JKIA and MIA respectively. Overall, a total of 5,430 questionnaires were distributed to non-resident visitors at the two exit points (4,930 - JKIA + 500 - MIA). Out 4930 at JKIA, 3000 were found to be fully completed and useful for analysis (60.8% success rated), and for MIA, 492 were fully completed and useful for analysis (98.4% success rated). On the basis of recommendation by Draugalis, Coons and Plaza (2008) that the goal of any survey should be to achieve response rates of approximately 60% and above, and for this case, both exit points had response rate above 60% and thus, was found to be suitable and formed the basis of the final analysis. Respondents were assured of the confidentiality of their responses, by highlighting that (i) all individual responses would only be viewed by researchers from Citilink Solutions ltd, (ii) that responses would be destroyed upon entry of the questionnaire data into

Citilink Solutions ltd computer system, and (iii) omitting names from the self-administered questionnaire.

2.2 Description of the Questions

The questionnaire was divided into four (4) sections (**Annex I**):

Section A. Tourist demographics (questions 1 – 5) and sought to establish; the nationality, country of residence, age, gender, and level of education of inbound tourists to Kenya. Without these questions it will be difficult to draw any conclusions on the who!

Section B. Trip characteristics (questions 6 – 19) and sought to establish; tourists' travel behavior, purpose of visit, whether first visit or otherwise, length of stay, destination information sources, mode of transportation, tourism products and activities. This establishes for example why they choose Kenya. We need to know who is travelling KQ as their international transport expenditure is of relevance to the Kenyan economy.

Section C. Estimated tourist expenditure (questions 20 – 22) and sought to determine; whether a tourist was on independent or inclusive package arrangement; overall expenditure, and expenditure on targeted items.

Section D. Future intentions (questions 23 – 29) and sought to establish overall tourism experience, perceptions and behavioral intentions.

2.3 Main survey questions and sub questions

Table 2.1 below provided the main and sub questions for tourist exit survey (TES)

Table 2.1: Main and sub survey questions

Main Survey Questions	Information captured through Sub questions
1.1 What were the demographic characteristics of tourists consuming destination Kenya?	The sub questions captured tourists; ✓ Nationality ✓ Country of residence ✓ Gender ✓ Age ✓ Level of education
1.2 What were the tourists' trip characteristics?	The sub questions captured; ✓ purpose of visit, ✓ Size of travel, ✓ first time or repeat visit, ✓ frequency of visits, ✓ Mode of transport used,

	✓ accommodation used, ✓ activities undertaken, ✓ visitors' length of stay, ✓ sources of destination awareness, ✓ Mode of booking
1.3 What was the estimated tourists' expenditure?	The sub questions addressed; ✓ Overall expenditure in Kenya
1.4 Were tourists' satisfied with their visit?	The sub questions addressed tourists; ✓ interests ✓ expectation, ✓ perceptions/experience, ✓ overall satisfaction, ✓ revisit intensions, ✓ improvements that tourists feel are important

2.4 Survey Activities

A series of survey activities were undertaken before commencement of TES:

- Reviewed relevant and available documents and data;
- Detailed development of methodology and design;
- Specification of indicators and corresponding components of data collection instruments;
- Development of draft guides for questionnaire survey interviews, observation, and informal discussions;
- Meetings and consultation with key stakeholders;
- Analysis of data;
- Drafted and presented the Inception Report (IR);
- Carried out pilot survey
- Improved research instruments

2.5 Pilot survey

The **table 2.2** provides the main outcomes and lessons learned from the pilot survey conducted on 25th August, 2019. The survey was regarded as a useful exercise because it spoke to consultants and let to; the re-organization of the research tools, ability of the RAs to complete the questionnaire in expected time, and reaction of respondents to the survey in terms of attitude, ability to understand the questions, and appropriate measurable answers, which resulted in lessons learned for, questionnaire finalization administration, sampling and other logistics. Overall the pilot assessed the validity of the questions and reliability of data collection processes and procedures. And enabled the researchers to gain insights into issues regarding sampling, the structure of the questionnaire, relevance of the questions, and whether they were understood by participants. Pilot survey provided ample opportunity for team members to gain useful experience in administration of questionnaire, content of the questionnaire, and approach.

Table 2.2: Outcome and lessons learned from pilot survey

Section Questionnaire	Outcome	Lesson Learned
Administrative Section	• Some RAs forgot that this was their section and thus, forgot to indicate exist points, starting time and their names	. Revisited importance of these section with RAs and was effectively done .
Introduction Length of questionnaire	• Was not clearly understood by tourists • Was found to be longer	• Importance of proper introduction, and easily understood. This was revisited during post-pilot review and improved • Questionnaire must be precise, clear and capture the short time respondents have. Questionnaire took about 18 – 20 min and thus reduced from 32 items to 29 items
Places, activities, facilities & transportation	• Worked well	• No change needed
Expenditure	• Most RAs had difficulties with this section in relation to breakdown of costs. • Some respondents refused to answer because they felt it was personal. • Business tourists were unaware of their costs cause was paid by firm.	• This was reworked to separate individual from those on package. • Introduce possible breakdowns to enable respondents to at least provide best estimates. • RAs were asked to repeat purpose of survey, importance of data, and request for information.

2.6 Procedure for Monitoring and Evaluation

The project activities were reviewed on regular intervals to ascertain progress and usage of project resources. The monitoring process involved the use of action plans designed with activities, indicators and input as shown in **table 2.3**.

Table 2.3: Survey activities and indicators

Activities	Indicators	Input
• Literature Review & Document Analysis	Type of Information (Quantitative and Qualitative) Sampling Method Sample Size	Creating a survey plan
• Preparation of Survey Instruments	Type of Information Sampling Method Sample Size	Appropriate survey type for use
• Piloting and training of RAs	Ability to understand Length of Instrument Answers Provided	Review of Instrument
• Data collection	Response rate Nature of information	Supply of Questionnaires, interviews schedule and supporting research instruments such as identification letters
• Data Analysis and Evaluation	Data entry	Coding & Imputing data collected Quality & Accuracy Check
• Report Writing	Client/ the objectives	Identifying priority recommendations and practical action plan
• Report presentation	Client/ the objectives	Sharing the report

CHAPTER 3: DEMOGRAPHICS OF NON RESIDENT VISITORS

3.0 Response Rate

Table 3.1 shows response rates by exit points. A total of 5,430 visitors were selected to participate in the survey. Interviews were successfully completed for 3,492 visitors yielding an overall response rate of 64.3%. Refusal to participate in the survey was one of the reasons for non-response while time constraints and language barriers were among the other reasons. Response rates varied across exit points, from 60.8% at JKIA to 98.4% at MIA.

Table 3.1: Response rate by exit points

	JKIA	MIA	Total
Contacted	4,930	500	5,430
Returned	3,000	492	3,492
Rate of return (%)	60.8%	98.4%%	64.3%

3.1 Gender and age distribution of non-resident visitor

Visitation to destination Kenya based on gender was evenly spread **(figure 3.1).** The findings showed that most significant age group for all non-resident visitors who visited Kenya was the 25 - 44 year old (59%)- **Figure 3.2.**

Figure 3.1: Gender of non-resident visitor

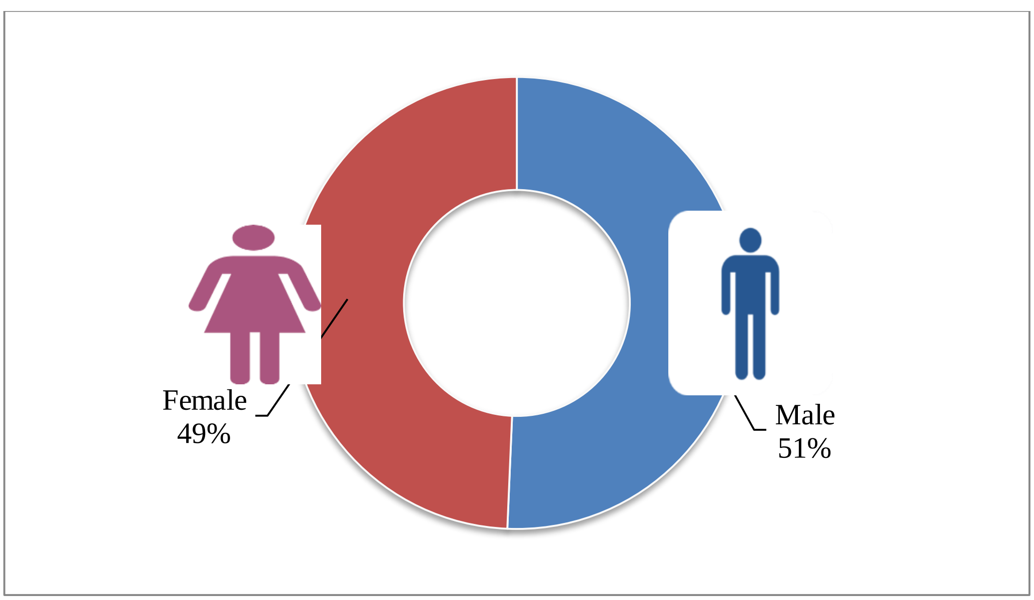
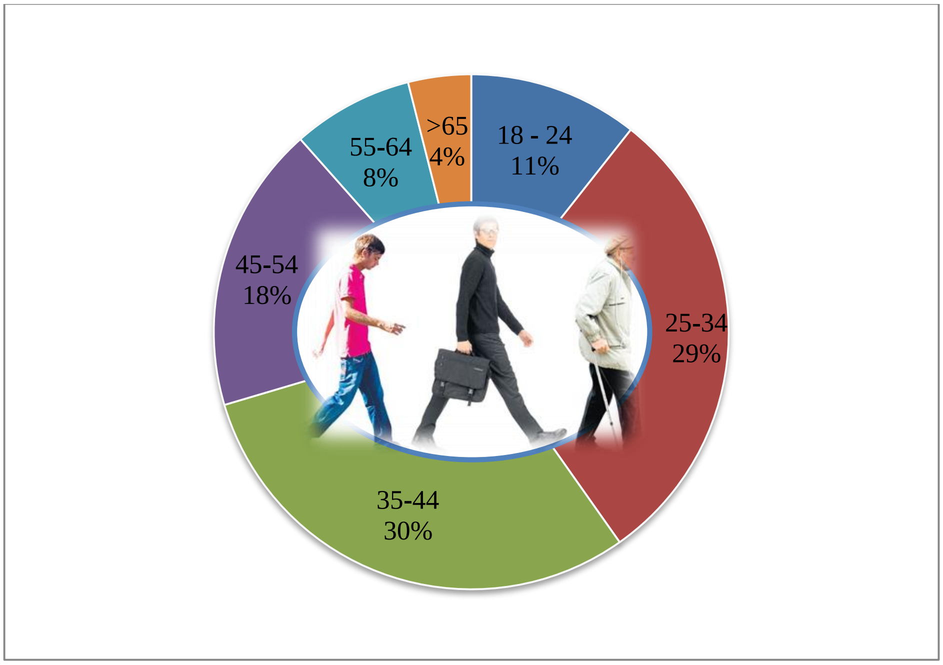


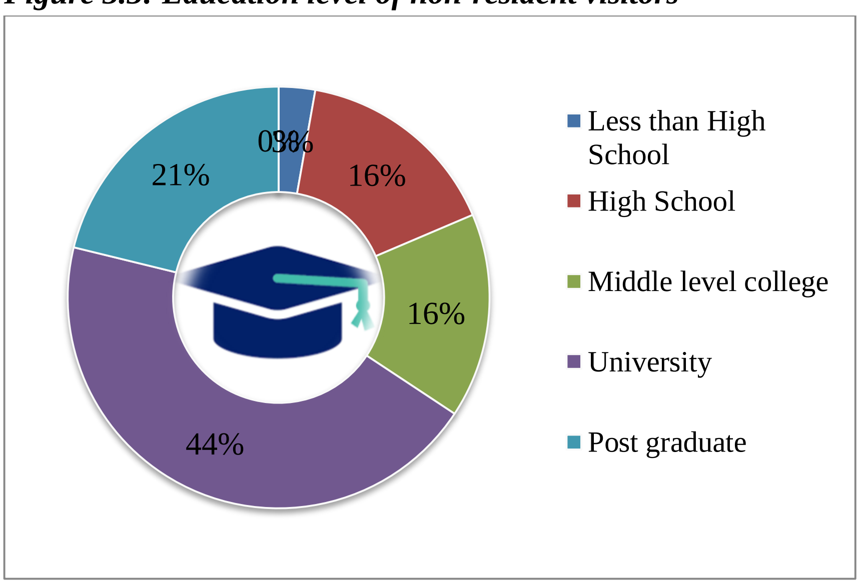
Figure 3.2: Age of non-resident visitors



3.2 Level of education of non-resident visitors

Slightly less than ¾ of all inbound non-resident visitors had post high school education and perhaps may have attained high professional status **(figure 3.3)**. Generally, highly educated tourists tend to be knowledgeable, know what they want and are keen to link 'during' consumption to expectations created 'before' consumption. This often referred to as interactive marketing is the most important marketing component because it happens in "real – time", and can enhance or break a destination.

Figure 3.3: Education level of non-resident visitors



3.3 Non-resident visitors by region

The top fifteen (15) consumers of Kenyan tourism products are led by residents of United states (14.8%), followed by residents of United Kingdom (12.8%) and lastly residents of Tanzania (1.5%) **Figure 3.3**

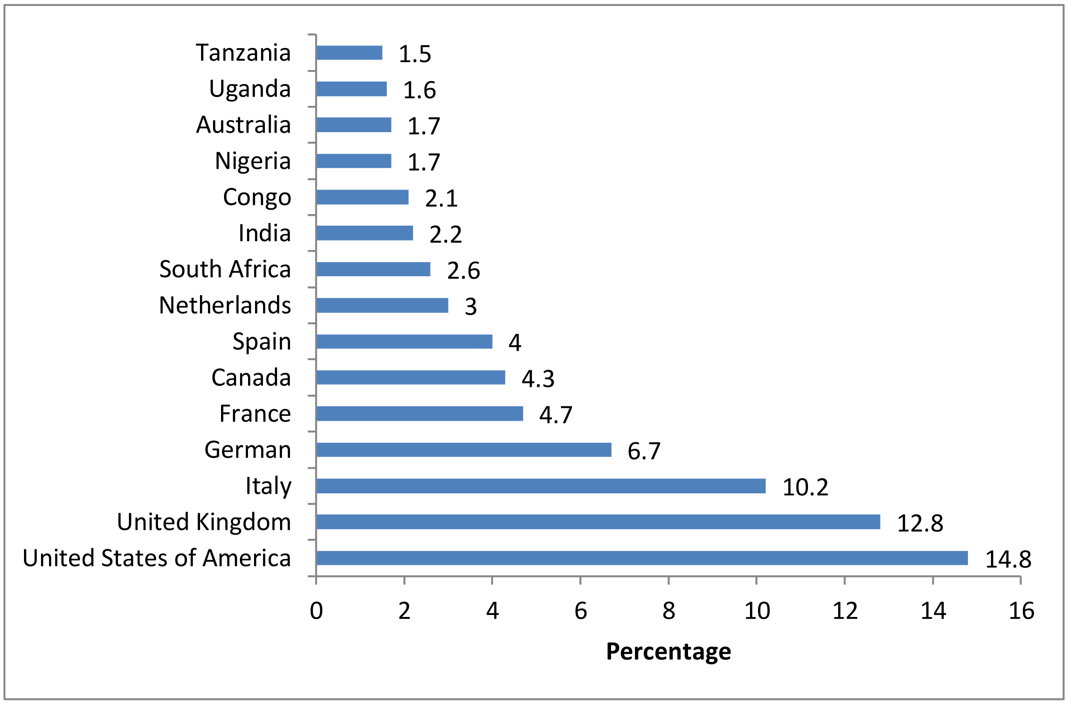
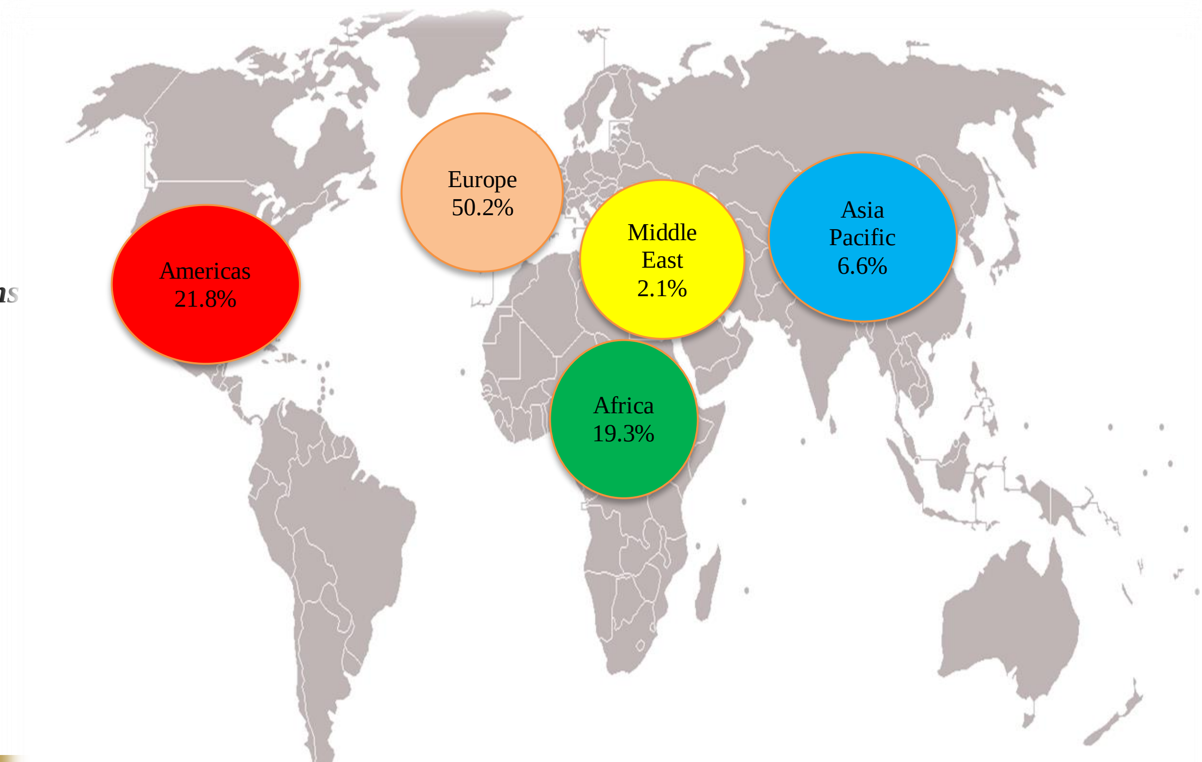


Figure 3.4: Top 15 source markets for destination Kenya

However, in general, the residents of Europe (50.2%) dominated the consumption of Kenyan tourism products (**Figure 3.5**)

Figure 3.5: Source Markets by World regions



3.4 Frequency of visit

On visit frequency, 57% indicated that they were visiting Kenya for the first time and almost 2 in 5 tourists were on return visit **(figure 3.6)**. This pattern was fairly well balanced in terms of gender i.e. first time male (56.2%) and female (58.2%)- **Figure 3.7.**

Figure 3.6: Frequency of visit

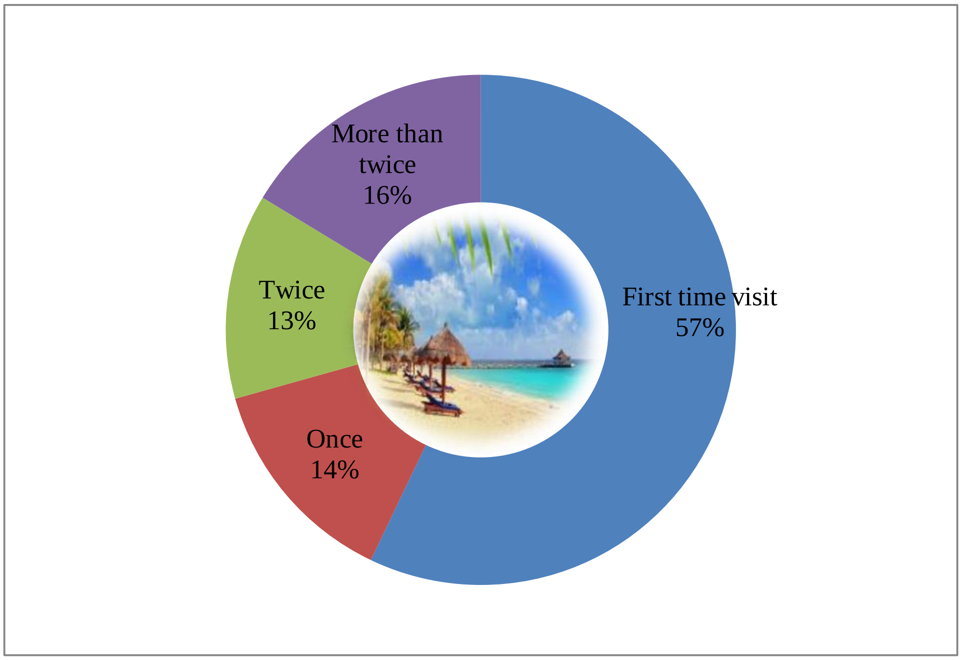
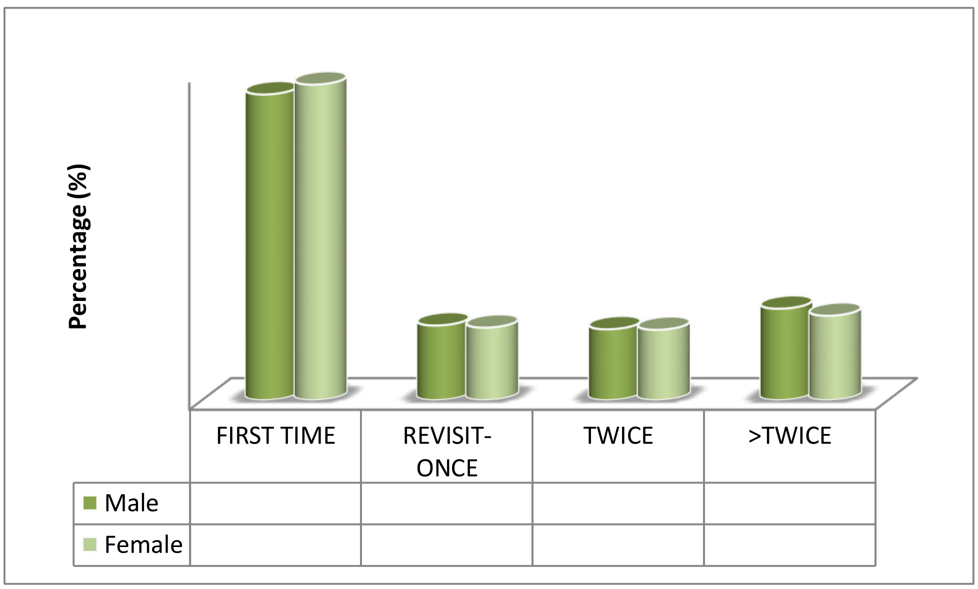


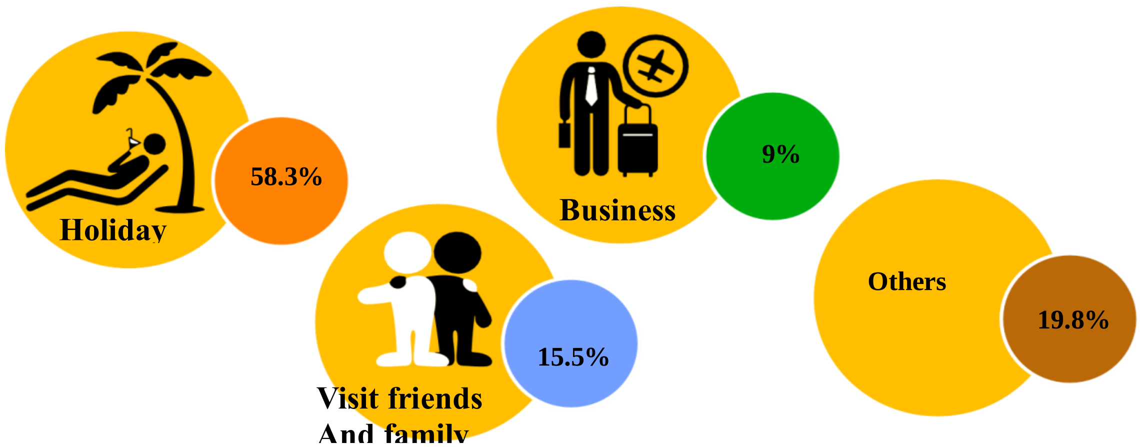
Figure 3.7: Frequency of visit by gender



4.1 Purpose of visit

Visitors from all regions of the world purposely visited for holiday (58.3%)- figure 4.1

Figure 4.1 Purpose of visit



4.2 Purpose of visit by country of residence

Europe was the leader led by Italy (83.6%), Americas led by Canada (69.7%), Africa led by South Africa (52.8%), Asia led by India (58.8%) and Oceania led by Australia (68.4%). FF market was dominated by Tanzania (30.6%), USA (23.5%) and Congo (21.1%). Those who purposely visited for business and conference were dominated by Africa residents. Business: Nigeria (16.4%), Congo (14.5%) and Tanzania (14.3%), conference; Uganda (10.2%), Congo (10.1%) and Nigeria (8.3%). There was noticeable number of tourist (8.9%) who reported that they were on transit **(table 4.1).**

Table 4.1: Purpose of visit by country of residence

County of Residence	Holiday %	VFR %	Business %	Conference %	Others %
USA	57.6	23.5	9.8	4.2	4.9
UK	65.6	18.9	6.9	5.3	3.3
Italy	83.6	6.2	2.3	1.1	6.8
German	70.7	16.9	6.2	2.7	3.5
France	72.0	12.1	7.6	2.5	5.8
Canada	69.7	15.5	9.9	2.1	2.8
Spain	70.8	9.2	6.2	3.8	10
Netherlands	68.3	10.6	11.5	1.9	7.7
South Africa	52.8	19.1	13.5	1.1	13.5
India	52,8	18.7	13.3	8.0	7.2
Congo	34.3	21.7	14.5	10.1	19.4
Nigeria	50.0	15.0	16.7	8.3	10
Australia	68.4	14.0	12.3	3.5	1.8
Uganda	40.8	16.3	10.2	10.2	22.5
Tanzania	42.9	30.6	14.3	6.1	6.1

There may be a need to develop a policy framework to grow these evidenced-based findings to support and grow intra/inter-African trade, businesses and meetings sector to benefit African citizens.

4.3 Purpose of visit by age

On average 62.4% of all non-resident visitors across all ages visited Kenya for holiday but dominated by 55 - 64 age bracket (65.6%) **Table 4.2.**

Table 4.2: Purpose of visit by age

Age(years)	Holiday %	VFR %	Business %	Conference %	Others %
18-24	61.9	15.6	5.6	4.4	12.5
25-34	61.7	15.9	8.9	4.9	8.6
35-44	59.4	18.0	11.9	4.7	6
45-54	62.9	16.5	10.8	5.0	4.8
55-64	65.6	11.6	7.6	8.4	6.8
>64	63.4	16.4	6.0	3.0	11.2

Age and participation in holiday activity were as follows: 18-24 years (10.4%), 25-34 years (30.1%), 35-44 years (28.5%), 45-54 years (18.7%), 55-64 years (8.1%) and >64 years (4.2%).

4.4 Purpose of visit by travel package

About ¾ of non-resident visitors in packaged tours were on holiday/leisure and slightly more than 1/2 of those in non-packaged tours purposely visited for holiday and leisure. About 1/4 of the non-packaged tours were visiting FF and almost 1 in 10 engaged in business. Non-packaged non-resident visitors seem to have FF and therefore, an avenue to engage in businesses either individually and/or with local partners and, family and friends **(Figure 4.2)**.

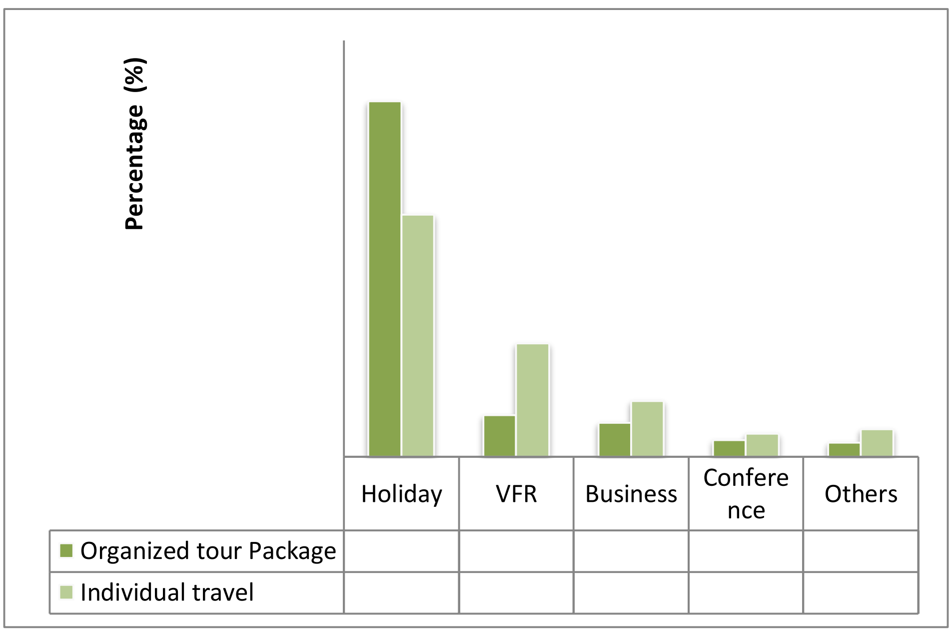


Figure 4.2: Purpose of visit by travel package

4.5 Travel arrangements

Travel arrangement was dominated by travel agencies both in and outside Kenya (42.6%)-**Figure 4.3** and almost 1 in 5 travelers used KQ (24.4%)- **figure 4.4**.

Demand for air travel depends considerably on purpose and other issues such as; distance, time, affordability, connectivity etc. Kenya being a long haul destination, holiday travelers preferred air travel (89.3%). KQ has a considerable global network and partnerships with other global players, it was therefore the airline of choice by many inbound visitors in almost 1 in 4 inbound visitors **(Figure 4.4)**

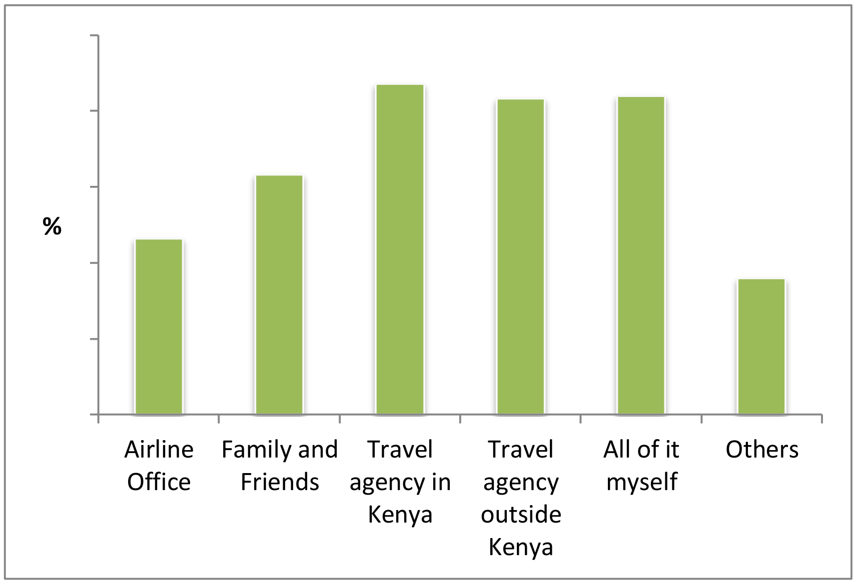


Figure 4.3: Travel arrangement used by non-resident visitor

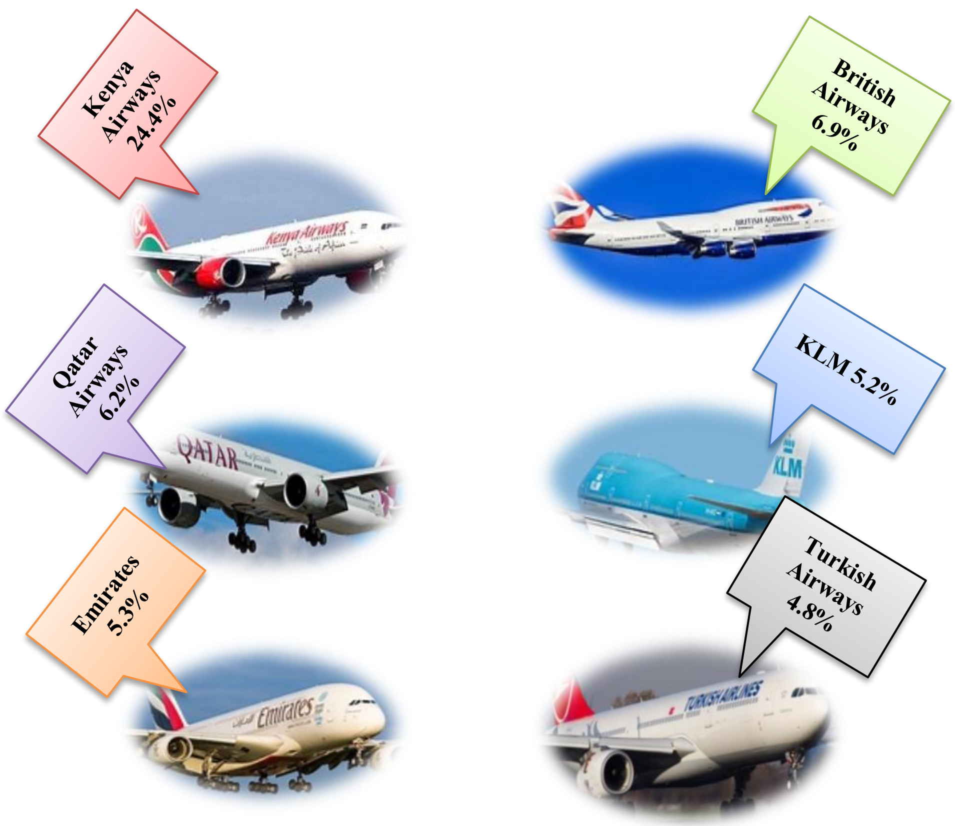


Figure 4.4: Major airlines used inbound Kenya

4.6 Travel arrangement by purpose of visit

Those who chose travel agencies for travel arrangements were almost ¾ consuming holiday/leisure, and those who used FF were almost evenly spread on holiday (48.6%) and FF (42.2%). Self-arranged travelers spread their activities wide led by holiday (52.8%, FF (18.8%) and business (12.6%), **table 4.3**. This is perhaps because self-arrangements gave them control and freedom to consume various products of their choices.

Travel arrangement	Holiday %	VFR %	Business %	Conference %
Airline	62.4	9.7	12.4	8.2
Friends & Family	48.6	42.2	4.9	4.3
Travel agency/ tour operator in Kenya	77.1	8.5	8.5	3.7
Travel agency/ tour operator outside Kenya	72.3	7.8	8.7	3.7
Myself	52.8	18.8	12.6	5.1
Others	16.7	2.4	31.0	9.5

Table 4.3: Travel arrangement by purpose of visit

4.7 Travel arrangements by country of residence

Travel agencies are preferred by residents of Kenya's traditional source markets to arrange and plan for their vacation; USA (48.4%), UK (43.7%), Italy (60.6%), German (54.8%; Australia (64.9%)-Table 4.4. However, residents of USA rely more on Kenyan travel agents (28.9) and self (25.9%) a total combination of (54.8%). European residents tend to evenly use travel agents and self, while residents of Africa tend to prefer FF for arrangements; Congo (27.1%), Nigeria (20.7%) and S.A. (20.5%). Self-arrangement is dominated by Tanzania (41.7%) followed by Spain (31.2%) and France (28.0%). Airline offices are not significant except for Uganda (27.1%), India (22.4%) and Nigeria (20.7%).

COUNTRY OF RESIDENCE	Airline %	Friends & family %	Travel agency/ Tour Operator in Kenya (%)	Travel agency/ Tour Operator outside Kenya (%)	Myself %
USA	5.8	20.8	28.9	19,5	25.9
UK	10.4	18.0	21.6	22.1	26.7
Italy	13.5	9.2	20.7	39.9	16.1
Germany	10	15.1	30.6	24.2	18.3
France	8.3	14.6	21.7	26.1	28.0
Canada	12.8	19.9	29.1	19.9	17.1
Spain	5.6	12	27.2	24.0	31.2
Netherlands	9.0	7	32.0	30.0	19.0
South Africa	17	20.5	18.2	22.7	19.3
India	22.4	17.1	23.7	11.8	25.0
Congo	6.8	27.1	22.0	20.3	20.3
Nigeria	20.7	20.7	25.9	10.3	20.7
Australia	7	7	29.8	35.1	21.1
Uganda	27.1	16.7	18.8	16.7	18.8
Tanzania	4.2	16.7	22.9	14.6	41.7

Table 4.4: Tourists travel arrangements by country of residence

The three top users of Travel agents outside Kenya were: Italy (39.9%), Australia (35.1%) and the Netherlands (30.0%). Top three users of travel agents in Kenya are: Netherlands (32.1%), German (30.6%) and Australia (29.8%), **table 4.5**.

4.8 Travelling party composition

Travelling party composition was dominated by solo travelers (36.1%) and families (25.5%) **figure 4.5**. The non-resident visitors who participated in this survey were fairly evenly spread between non-packaged (43.4%) and packaged (40.6%). Additionally, the non-resident visitors who participated in this survey were fairly evenly spread between non-inclusive packages (43.4%) and inclusive package (40.6%)- **figure 4.6.**

Figure 4.5: Travelling party composition

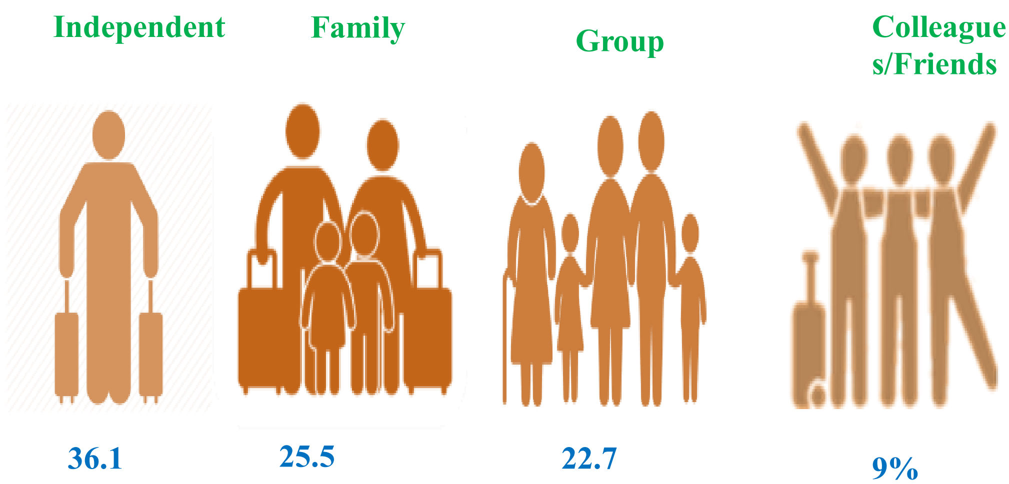
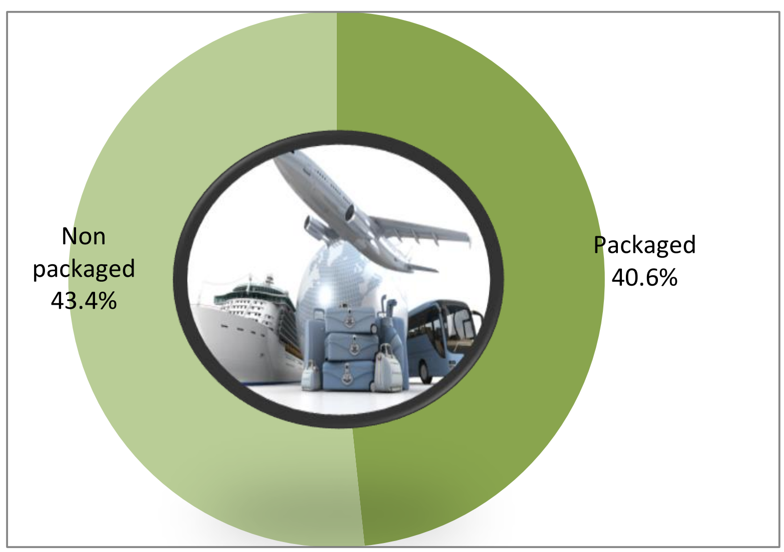


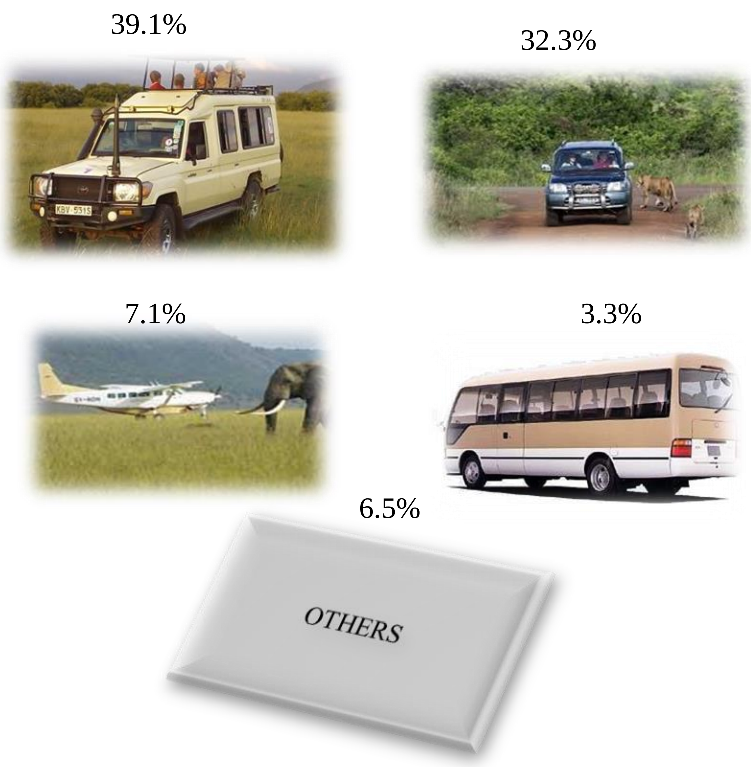
Figure 4.6: Type of travel package



4.9 Modes of transportation within the destination

During consumption of Kenyan tourism products, 39.1% used tour vehicles as part of the packaged travel arrangement and 32.3% used private cars (Figure 4.7).

Figure 4.7: Modes of transportation



CHAPTER 5: TRIP PLANNING INFORMATION SOURCE

5.1 Trip planning information source

Non-resident visitors sourced their information for decision making fairly evenly between internet (24.9%) and FF (23.7%). However, technology (42.8%) seemed to dominate other sources (**Figure 5.1**).

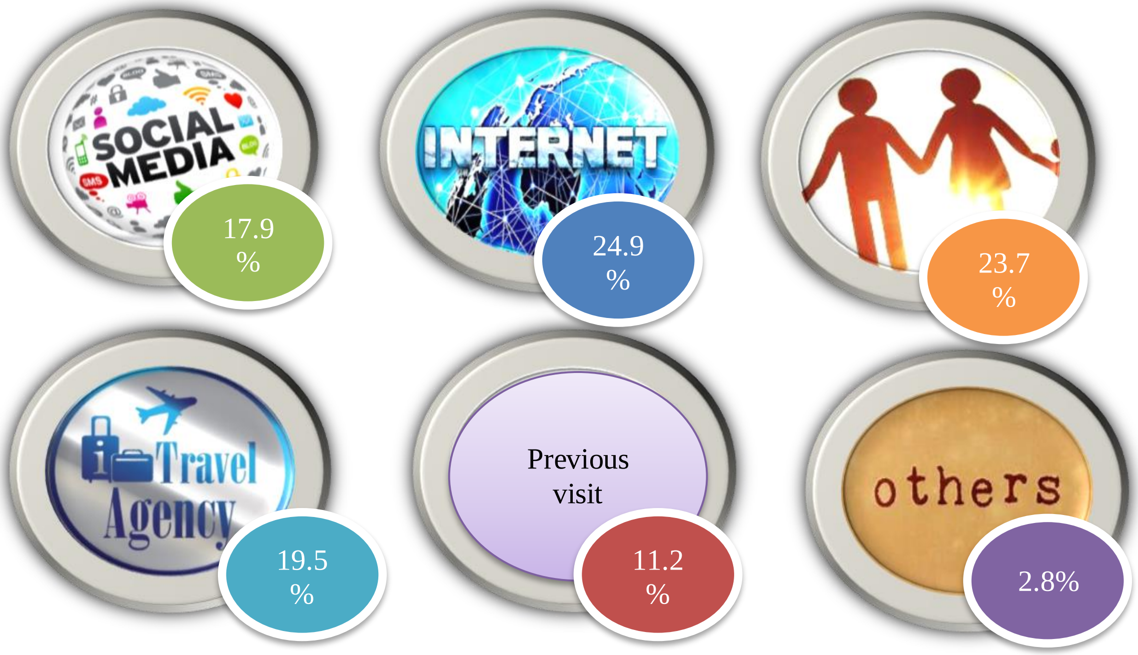


Figure 5.1: Source of information

5.2 Information source by age

Various age groups sourced for information spread across all sources**.** However, 35 - 44 years dominated in the technology (53.5%) and 55 – 64 years dominated in FF & travel agencies (56.6%). The 18 – 24 years age brackets relied on FF (33.2%) while, the widely held belief points towards social media. Overall, the 18 – 24 (92.5%) and 35 – 42 (92.6%) choices of technology, FF and travel agency were fairly evenly spread **(table 5.1)**.

Age (years)	Social media %	Internet %	Family & Friends %	Travel agency/ Tour Operator (%)	Previous visit (%)
18-24	23.3	20.2	33.2	15.8	8.1
25-34	22.8	29.0	29.4	19.3	10.4
35-44	20.9	32.6	21.8	17.3	11.1
45-54	14.2	24.3	22.3	28.3	17.0
55-64	14.6	22.4	22.0	34.6	17.1
>65	10.5	15.0	31.6	24.1	16.5

Table 5.1: Information source by age

5.3 Information source by gender

Non-resident male and female visitors sourced for information from internet and FF almost evenly equally (54.3%) and (52.2%) respectively (**figure 5.2**). It was also noted that male (21.3%) and female (21.4%) chose travel agencies almost equally but use of internet was in favour of women.

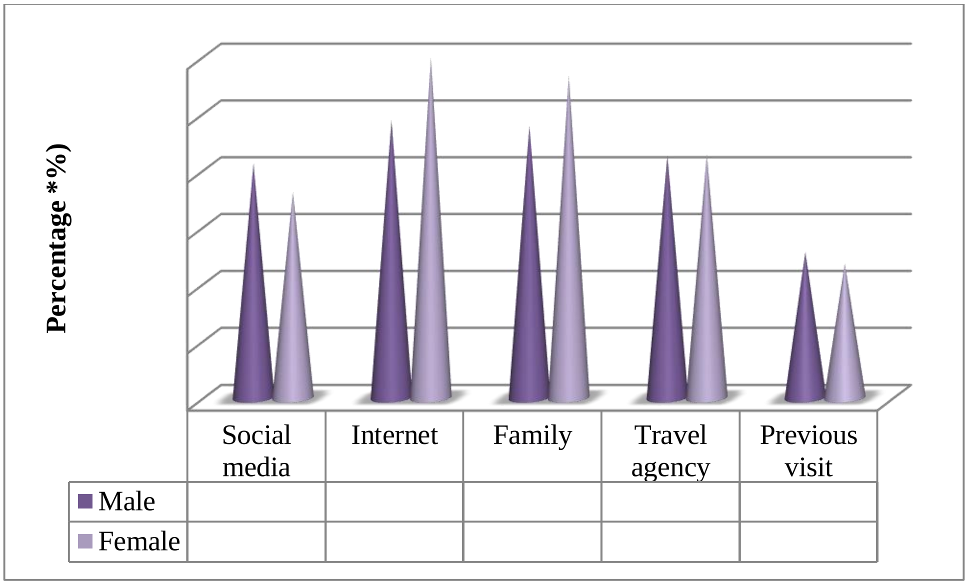


Figure 5.2: Information source by gender

5.4 Information source and frequency of visit

First timers and repeat once relied more on internet (31.5%) and (27.8%) respectively. The non-resident visitors who visited Kenya twice engaged social media (22.9%) more while those who inbounded more than twice relied more on FF (39.3%) and previous visit (28.6%), **table 5.2.**

NO.OF VISITS	Social media (%)	Internet (%)	Family & Friends (%)	Travel agency/Tour Operator (%)	Previous visit (%)
First time visit	20.4	31.5	24.7	27.1	
Repeat visit- Once	20.2	27.8	23.0	15.1	22.3
Twice	22.9	22.0	19.8	15.6	22.7
>twice	13.3	15.5	39.2	11.4	28.6

Table 5.2: Visitor information source by number of visit

5.5 Information source by country of residence

Residents of the top 6 source markets of inbound non-resident visitors chose; internet & FF (USA 54.3%), internet & FF (UK 55.5%), Internet & Travel agencies (Italy- 61.3%), Internet & FF (German 57.1%), and internet & FF (Canada 62.0%). However, France stood out as the leader in technology use (54.7%), while USA came last (36.5%)- **Table 5.3**. This finding and observation was quite interesting because the US is known to be the undisputed leader in technology innovation.

Table 5.3: Information source by country of residence

Country of Residence	Social media (%)	Internet (%)	Friends & Family (%)	Travel agency/ Tour operator (%)	Previous visit (%)
USA	12.8	23.7	30.6	22.0	15.2
UK	19.6	27.0	28.5	19.1	13.6
Italy	25.9	27.1	26.2	34.2	4.0
German	15.5	27.4	29.7	25.1	11.0
France	20.7	34.0	17.3	17.3	9.3
Canada	19.0	30.3	31.7	27.5	13.4
Spain	13.4	33.9	28.3	23.6	12.6
Netherlands	13.9	30.7	13.9	30.7	16.8
South Africa	23.0	19.5	27.6	18.4	12.6
India	16.9	25.4	19.7	12.7	12.7
Congo	13.6	19.7	24,2	13.6	15.2
Nigeria	19.6	24.1	22.4	12.1	19.0
Australia	19.3	21.1	10.5	38.6	12.3
Uganda	19.6	19.6	26.1	13.9	13.0
Tanzania	22.2	20.0	33.3	17,8	22.2

African residents chose social media & FF (SA 50.6%), internet & FF (Congo 42.9%); internet & FF (Nigeria 46.5%) internet & FF (Uganda 45.7%) and; social media/FF & previous visit/FF (Tanzania 55.5%). Nigeria led in the use of technology (43.7%), then S.A. (42.5%). These two countries are the largest economies in Africa (WB, 2017).

CHAPTER 6: DAYS SPENT IN KENYA

6.1 Number of days spent in Kenya

The length of stay in any destination has an impact on tourism expenditure, interaction with local communities and multiplier effects. Days away from usual residence varied among non-resident visitor to Kenya **(Figure 6.1).** But majority (33.2%) had been away for 6 - 10 days, followed by 11 - 20 days (29.5%). At the same time the length of stay in Kenya was also dominated (32.9%) by 6 - 10 days followed by 11 - 20 days (20.0%) though those reporting 4 - 5 days stay had increased by 6.5% and those reporting more than 20 days had decreased by 5.7%-**figure 6.1.** And yet the longer the stay the better the spent and its accompanying benefit.

However, length of stay was line with the global trend of traveler's taking generally shorter trips.

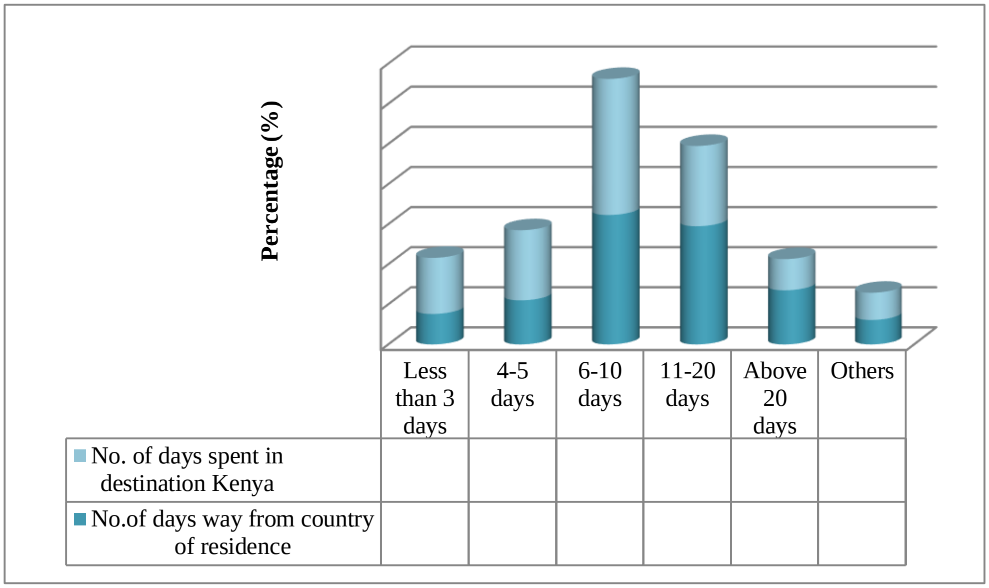
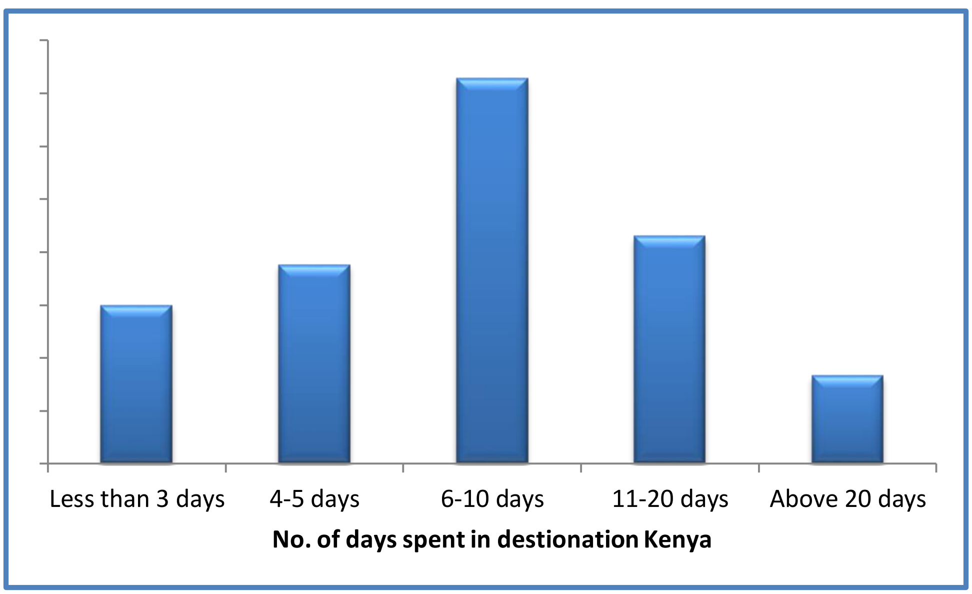


Figure 6.1 Number of days away Vs number of days spent in Kenya

Figure 6.2 Number of day spent in Kenya



6.2 Length of stay in Kenya by purpose of visit

Those visitors who stayed 6-10 days and 11- 20 days spent most of their time holidaying almost evenly (72.6%, & 73.3%) respectively. However, those who stayed more than 20 days, almost 1 to 2 spent their time VFF and holidaying **(Table 6.1).** There is need to strategize on how to improve and increase length of stay and in commercial accommodation to enhance spend and distribution of benefits.

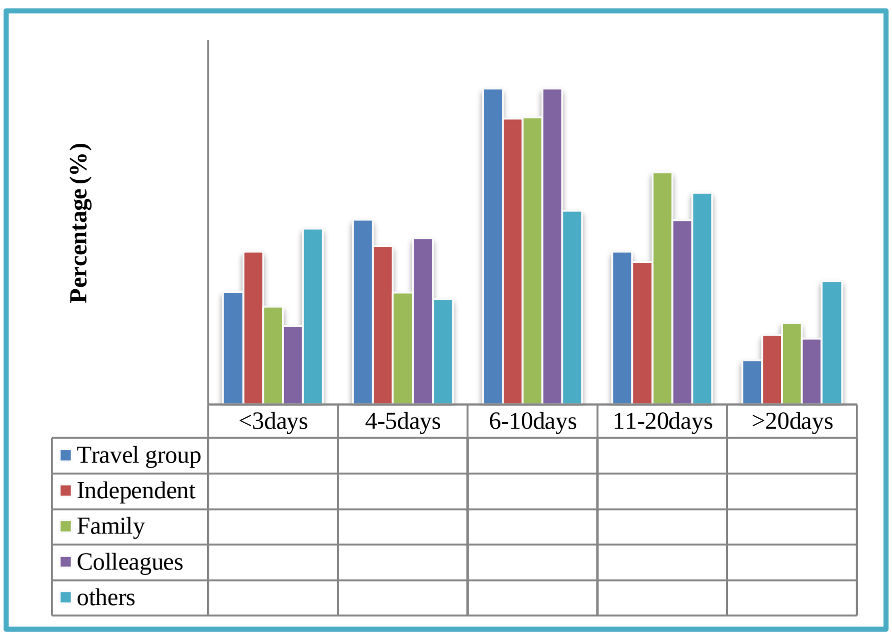
Length of stay in destination Kenya	Holiday (%)	VFR (%)	Business (%)	Conference (%)	Others (%)
<3days	33.7	7.4	13.1	9.2	36.6
4-5days	58.4	16.5	14.2	5.8	5.1
6-10days	72.6	15.4	9.0	3.0	-
11-20days	73.3	17.9	5.5	3.3	-
>20days	52.8	32.0	7.1	4.5	3.6

Table 6.1: Tourists' length of stay by purpose of visit

6.3 Length of stay in Kenya by travelling party composition

Families stayed much longer (6 - 20 days) in vacation (64.2%), followed by colleagues/ friends (61.7%). Those travelling in groups (61.8%) dominated the 4 – 10 days followed by solo (54.9%) **figure 6.3**.

Figure 6.2: Tourist length of stay by travelling party composition



6.4 Length of stay in Kenya by country of residence

Non-resident visitors who stayed 6 - 20 days were led by Italy (69.7%) followed by the Netherlands (64.7%). In Africa, Nigeria (54.3%) was the leader followed by South Africa (53.4%) and Tanzania (50.0%). Those who spent less than 3 days from Africa were led by Uganda (31.3%), Congo (27.7%) and South Africa (25.0%). Europe was led by France (19.4%), and Spain and U.K. were evenly spread (13.3% and 13.2%), **table 6.2**.

Country of Residence	<3days %	4-5days %	6-10days %	11-20days %	>20days %
USA	9.6	18.9	38.4	24.4	8.7
UK	13.2	17.7	35.5	24.0	9.6
Italy	7.9	14.5	51.0	18.7	7.9
German	8.4	17.0	23.3	39.6	11.7
France	19.4	18.7	32.9	21.3	7.7
Canada	6.4	25.0	37.9	24.3	6.4
Spain	13.3	18.0	38.3	25.8	4.6
Netherlands	16.7	15.7	34.3	30.4	2.9
South Africa	25.0	18.2	34.1	19.3	3.4
India	13.7	20.5	45.2	12.3	8.3
Congo	27.7	26.2	35.4	9.2	1.5
Nigeria	18.6	16.9	44.1	10.2	10.2
Australia	15.8	19.3	36.8	17.5	10.6
Uganda	31.3	25.0	33.3	8.3	2.1
Tanzania	20.8	27.1	37.5	12.5	2.1

Table 6.2: Length of stay by country of residence

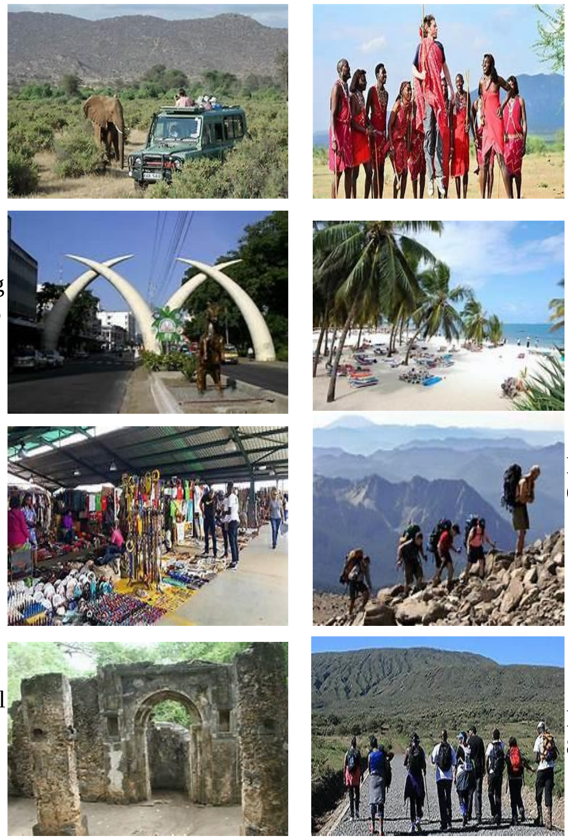
7.1 What attracted tourists to Kenya?

Kenya is endowed with the world famous products that motivates and attracts non-resident visitors. The top 4 motivators and factors that influenced tourist to come to Kenya were; wildlife (61.7%), culture (25.3%), friendly people (19.0%) and beach (17.0%) **Figure 7.1**.

It was indeed good to note that Kenyan friendly people were part of the motivators. The question may be this; how can Kenyan people be packaged and sold to enhance motivation to travel?

Figure 7.1: What attracted tourists to Kenya?

7.2 Tourists trip activity



Wildlife Viewing 60.5%

Cultural Tours 23.8%

Sight Seeing 20.3%

Beach Tourism 18.5%

Shopping 16.0%

Mountain Climbing 11.5%

Visit to Historical Sites 9.4%

Hiking 8.3%

The top 4 activities inbound non-resident visitors engaged in were wildlife viewing (60.5%), cultural tours (23.8%), sightseeing (20.3%) and beaching (18.5%). It was evident that motivation led to activity participation **(figure 7.2)**.

Figure 7.2: Primary trip activity

7.3 Trip activity by purpose of visit

Non-resident visitors, who purposely visited for holiday, participated in the consumption of Kenya's tourism products led by beaching (82.9%) and overall about 73.1% engaged wildlife viewing, cultural tours, and mountain climbing, and sightseeing. Slightly more than half participated in shopping (22.6%) and spread their participation in other activities almost evenly. Business and conference were each below 10% except shopping and participation in business (12.3%), **Table 7.1.**

Activity tourists participated	Holiday %	VFR %	Business %	Conference %
Wildlife viewing	76.8	14.5	6.7	2.5
Culture tours	76.8	14.5	5.7	2.3
Sights seeing	70.9	16.5	7.2	2.7
Beach tourism	82.9	13.4	3.7	1.6
Shopping	56.0	22.6	12.3	4.3
Mountain climbing	71.6	17.9	9.5	3.0

Table 7.1: Tourist activity by purpose of visit

7.4 Trip activity by travelling party composition

Travelling party composition of non-resident visitors spread their holiday engagement in various activities led by on average wildlife viewing (72.3%) cultural tours (27.86%) and sightseeing (27.66%) **table 7.2.**

Travel party composition	Wildlife viewing (%)	Cultural tours (%)	Sightseeing (%)	Beaching (%)	Shopping (%)
Group travel	76.7	41.0	27.9	21.7	16.7
Independent	68.0	25.6	22.1	16.0	18.4
Family	75.3	22.4	22.3	30.6	20.6
Colleague/friends	74.0	25.3	26.0	22.8	24.2
Others	67.5	25.0	40.0	32.5	27.5

Table 7.2: Trip activity by travelling party composition

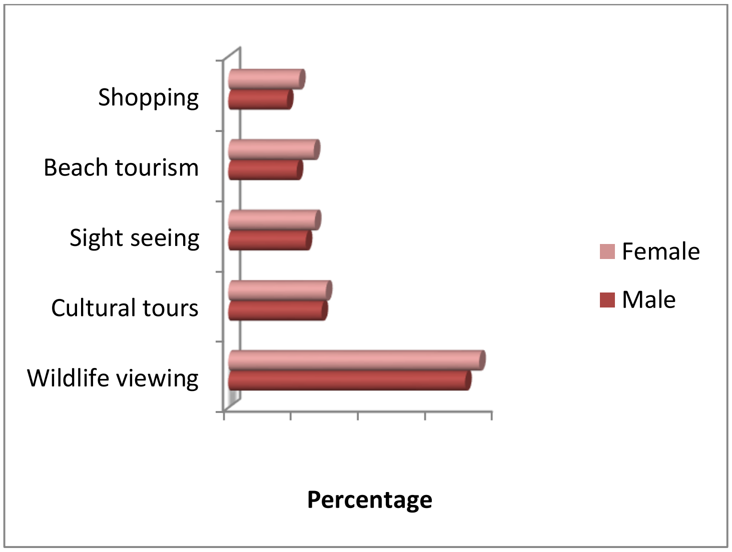
7.5 Trip activity by gender and age

Male and female non-resident visitors spent most of their time fairly evenly in the top 5 activities with a slight edge in favor of women **(figure 7.3)**. More than 2/3 of all age groups participated in wildlife view, but dominated by 55 – 64 years old (80.9%), **table 7.3**. The same age group had engaged in cultural tours (32.0%), and sight-seeing (37.3%). Besides wildlife viewing (74.7%), the 18 – 24 year olds dominated in beaching (30%). The more than 64 year olds had a slight edge in shopping (22.2%).

Figure 7.3: Trip activity by gender

Table 7.3: Trip activity by age

Age (Years)	Wildlife viewing (%)	Cultural tours (%)	Sight seeing (%)	Beaching (%)	Shopping (%)
18-24	74.7	30.6	24.6	30.6	21.5
25-34	70.3	26.5	21.0	23.0	20.1
35-44	67.6	26.8	22.4	18.0	19.4
45-54	78.7	31.1	25.3	24.9	15.5
55-64	80.9	32.0	37.3	24.0	19.1
>65	78.6	31.0	33.3	11.1	22.2



7.6 Trip activity by country of residence

Wildlife viewing was the most important activity across all residents of the top 15 generators of non-resident visitors. Individually, Spain (92.9%), Australia (83.7%), and Canada (81.2%) led pack in wildlife viewing, Canada (39.2%), Australia 36.7%) and the Netherlands 35.2%) led the pack in cultural tours; Australia (44.9%), Spain (31.9%) and Italy (29.6%) led pack in sightseeing; Italy (51.8%), German (40.3%) and France (28.5%) led the pack in beaching; while Tanzania (25.0%), USA (24.2%) and Nigeria (24.0% led in shopping respectively **(table 7.4)**.

Country of residence	Wildlife viewing (%)	Cultural tours (%)	Sight seeing (%)	Beaching (%)	Shopping (%)
USA	76.2	30.9	29.3	10.9	24.2
UK	74.5	25.5	27.4	20.9	17.9
Italy	80.2	38.0	29.6	51.8	18.6
Germany	79.1	34.1	28.2	40.3	19.4
France	76.2	30.0	23.8	28.5	21.5
Canada	81.2	39.1	24.8	24.1	15.0
Spain	92.9	25.0	31.9	27.4	22.1
Netherlands	75.8	35.2	24.2	26.4	12.1
South Africa	59.7	16.9	20.8	11.7	14.3
India	71.4	12.7	4.8	14.3	11.1
Congo	39.3	23.2	8.9	10.7	19.6
Nigeria	70.0	18.0	12.0	14.0	24.0
Australia	83.7	36.7	44.9	18.4	10.2
Uganda	48.9	17.8	22.2	4.4	15.6
Tanzania	50.0	37.5	10.0	7.5	25.0

Table 7.4 Tourist activity by country of residence

7.7 Visitor accommodation

For non-resident visitors, hotel stays were by far the most popular at 52.8% and almost 7 in 20 of travel parties slept in resort (18.1%) and lodge (17.6%)- **Figure 7.4**. Almost all vacationers stayed in commercial paid accommodation which generally brings benefits to country and her people in terms of employment, taxation, supplies, SMEs etc.

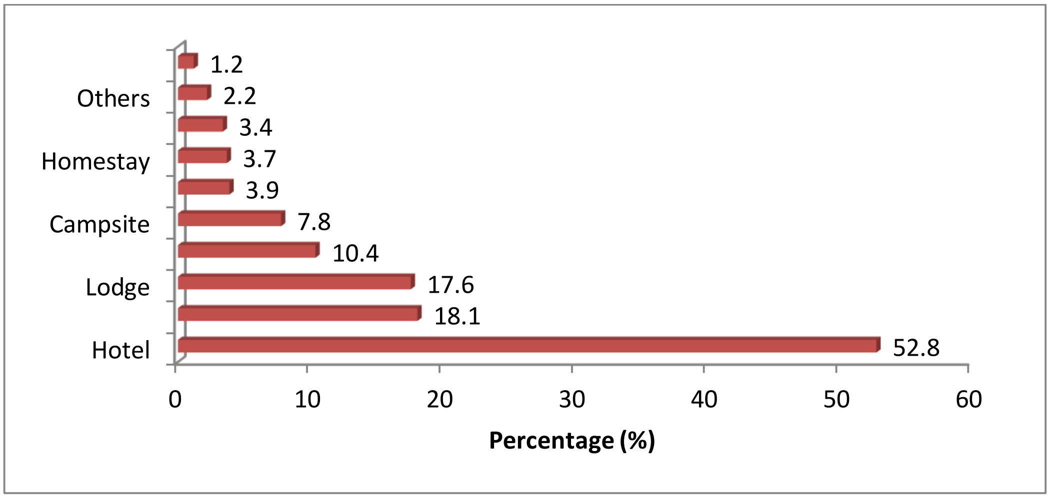


Figure 7.4: Visitor accommodation

7.8 Visitor expenditure

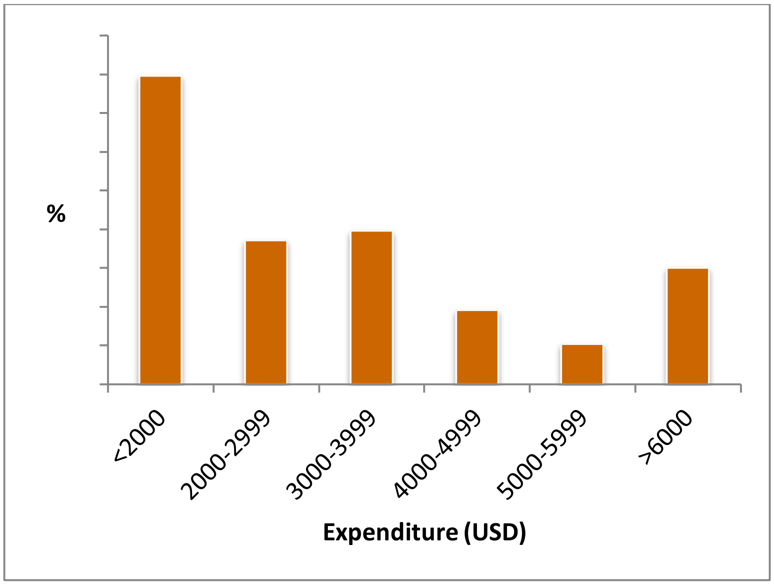
On average non-resident visitors spent their dollars on various items ranging from on average holiday (69.2%) to Conferences (3.1%) (**Table 7.5**). Those who spent less than USD 1,999 were 2 in 5 of the non-resident visitors and about 3 in 20 tourists spent more than USD 6,000 **(Figure 7.5)**. From this, it could then mean that destination Kenya is progressively attracting quality non-resident visitors. Residents of Canada were the highest spenders with 40.3% spending more than USD 6,000 followed by residents of Australia at 23.8%. Those who spent more than USD 6,000 from Africa were SA (17.4) followed by resident of Nigeria (16.7), **table 7.5**. The survey did not confirm the generally held views that the senior citizens stay longer at a destination and spends more generously.

Expenditure (USD)	Holiday %	VFR %	Business %	Conference %
<2000	58.4	19.4	11.3	4.4
2000-2999	75.2	14.8	7.6	2.0
3000-3999	73.4	14.6	10.8	2.5
4000-4999	65.1	24.8	7.8	3.9
5000-5999	67.6	15.5	9.9	4.2

>6000	75.5	9.5	11.5	2.0

Table 7.5: Visitor expenditure by purpose of visit

Figure 7.5: Visitor expenditure



CHAPTER 8: VISITOR EXPERIENCE AND SATISFACTION

8.1 Visitor satisfaction

Overall non-resident visitors reported high levels of satisfaction with various aspects of their trip to Kenya (74.3%)- **Figure 8.1**. The visitors were satisfied to very satisfied with; attractions (65.0%), the ability to engage in various activities (64.1%), accommodation (62.0%) and amenities (58.8%), table 8.1. Overall, 3 in 4 non-resident visitors were satisfied to very satisfied with destination Kenya, its products and activities

Figure 8.1: Level of satisfaction

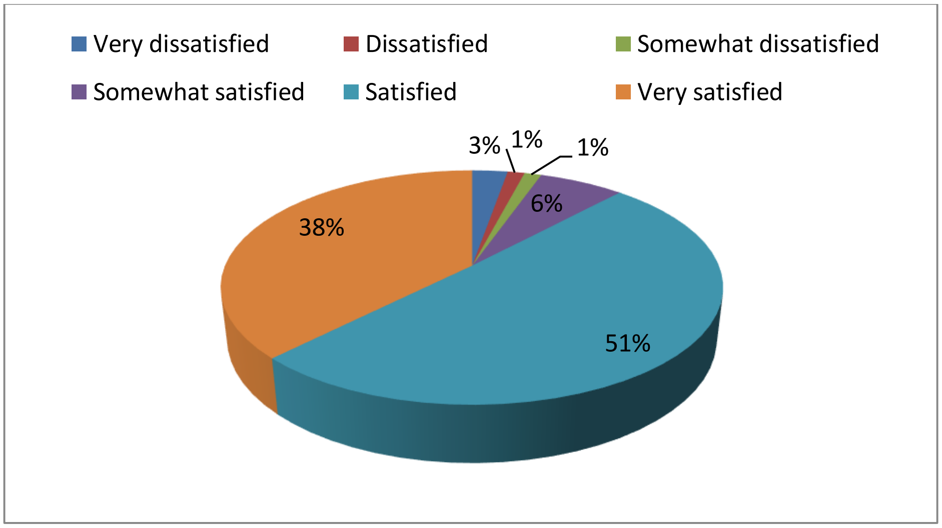


Table 8.1: Level of satisfaction with key destination attributes

	Very dissatisfied (%)	Dissatisfied (%)	Somewhat Dissatisfied (%)	Somewhat Satisfied (%)	Satisfied (%)	Very Satisfied (%)
Attraction	2.3	1.9	3.3	7.3	35.9	29.1
Accessibility	3	3.6	8	17.1	29.6	15.8
Accommodation	2.1	1.3	3.6	9.5	36.8	25.2
Amenities	1.7	2.2	4.1	11.5	35.2	23.6
Tourist activities	1.7	1	2.7	7.9	32.4	31.7

8.2 Likelihood to re-visit

71.3% of non-resident visitors reported to likely and very likely to re-visit destination Kenya (**Figure 8.2**) and indicated that cultural and natural heritage would be the major pull factors (**figure 8.3**). Slightly more than 9 out of 10 visitors from African countries reported likely to very likely to re-visit Kenya again.

Figure 8.2: Likelihood to revisit Kenya

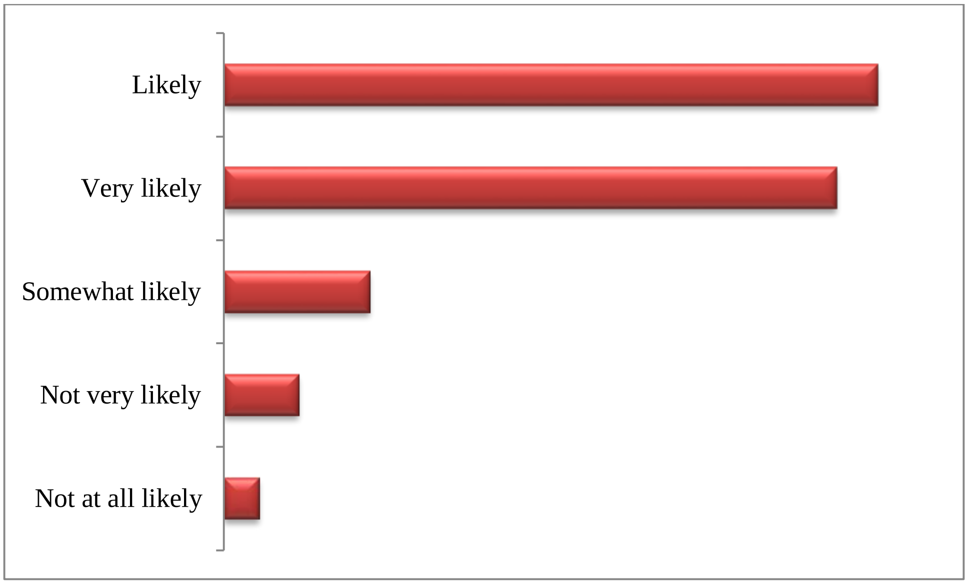
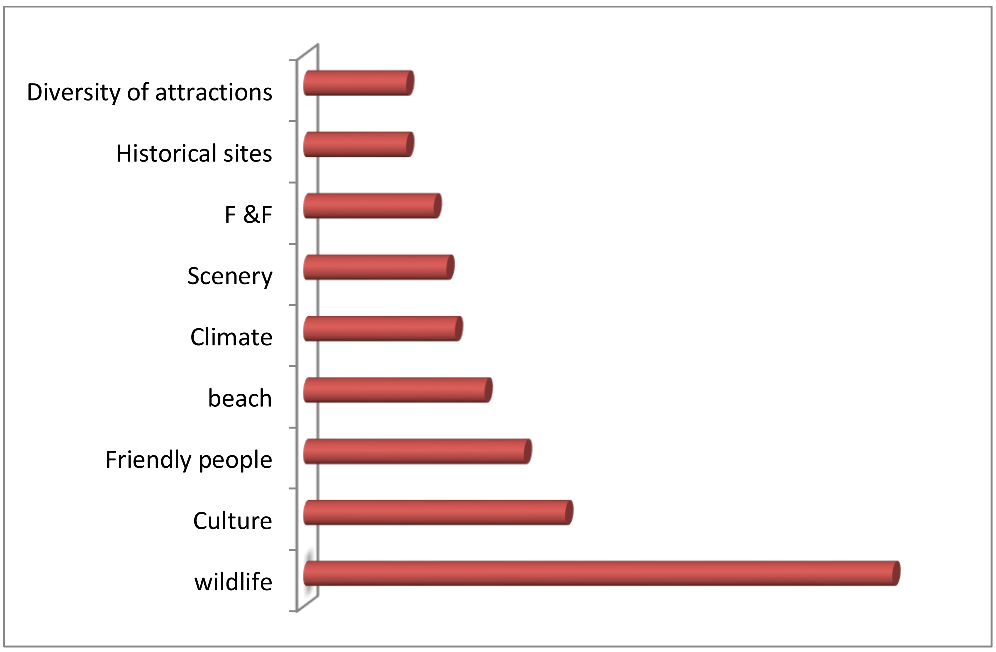


Figure 8.3: Attractions likely to make tourists revisit Kenya



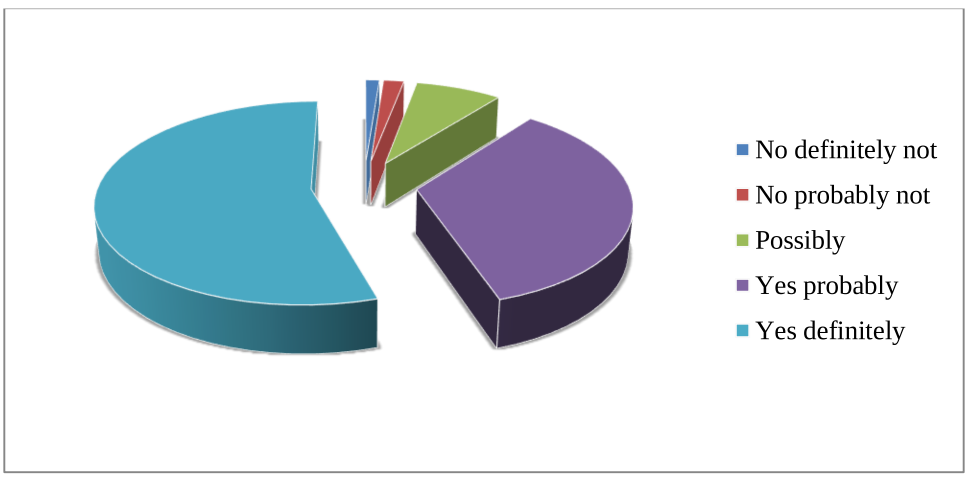
8.3 Likelihood to re-visit Kenya by country of residence

On average 4 in 5 non-resident visitors form 15 top source markets were likely to very likely to consume destination Kenya and its objects (Table 8.2). This pointed to a positive perception of the destination as a result of services, products and activities on offer to the visitors, and also an indication of future intentions in favor of re-visitation. Overall, 76.25% of all sampled residents of Europe, 66.3% of the sampled residents of Africa were likely to revisit Kenya because of the availability of wildlife and their related activities. These findings mirror other findings elsewhere, e.g. the Gold Coast Australia (2002) and Namibia (2013). Again, as shown in **figure 8.4**, a majority (54.9%) of visitors were willing to recommend Kenya to others.

Table 8.2: Likelihood to revisit destination Kenya by country of residence

Country of residence	Not at all (%)	Not very (%)	Somewhat (%)	Likely (%)	Very likely (%)
USA	2.2	4.2	9.2	38.9	45.3
UK	1.0	8.1	9.9	40.1	40.9
Italy	5.6	5.8	12.6	40.9	34.5
German	4.4	5.8	16.0	45.6	28.2
France	0,8	3.8	9.1	48.5	37.9
Canada	3.1	3.8	7.6	44.3	41.2
Spain	2.5	10.2	15.3	44.1	28.0
Netherlands	5.3	7.4	9.6	46.8	30.9
South Africa	4.8	2.4	2.4	36.1	54.2
India			6.0	47.8	46.3
Congo	3.7	3.7	1.9	51.9	38.9
Nigeria		1.9	5.8	53.8	38.5
Australia	3.7	5.6	14.8	35.2	40.7
Uganda		2.2		33.3	64.4
Tanzania		2.3	7.0	39.5	51.2

Figure 8.4 Possibility of visitors recommending Kenya to others



CHAPTER 9: VISITOR COMMENTS AND SUGGESTIONS

9.1 Non-resident visitor comments

At the end of the questionnaire survey, the non-resident visitors were asked if they had any comments they would like to share. Most of the visitors recorded a number of frustrations and some happiness which were summarized into themes (see table 9.1):

Table 9.1: Emerging themes from non-residents visitors' comments

No.	Theme	Indicators	Cumulative percentage
1	**Transportation and Access**	- Flight delays and cancellation - Traffic and highway congestion - Accessibility to some attractions	57%
2	**Cleanliness**	- Garbage disposal - Untidy city and airport - A lot of plastic bottles - Protection of the environment	32.5%
3	**Service Providers at exit points**	- Police demanding bribes - Unfriendly customer service staff - Unprofessional guides/drivers	18%
4	**Security**	- Light the cities - Beach people and socio-economic wellbeing - Provision of security personnel	42.7%
5	**Friendly people and beautiful country**	- hospitable people - made new friends - lovely scenery - nice place to come and relax	65.7%

9.2: Sampled verbatim quotes

a) Transport and Access

A lot of comments touching on transportation on Kenya highways and to the attractions were negative. Quotes included:

"Oh my God, two hours from the airport to the hotel in the city centre"

"Improve your roads"

"Take control of your highways"

"It is improving and can be better" these were return visitors who acknowledged some improvements.

"I hate KQ flights delays and cancellation, very frustrating. "KQ is a very expensive airline and may be a barrier to more frequent and/or future visits".

b) Cleanliness

"Garbage, plastic bottles and litter is everywhere"

"I cannot see dustbins and those that are there are full"

"They can't collect the garbage and dispose it off"

"The city is dirty; some places in the airport are untidy"

"The beach and its environment is not clean enough, plastic everywhere"

"I can't understand why there are plastic bottles in these great parks"

"Some places smell like hell"

c) Service Providers

"Some police officers demand bribes"

"Immigration officers are inept and very corrupt, this must stop"

"The guides and drivers demand money in order to be taken to specific areas in the parks, some of them are very unprofessional"

"Some customer services staff were rude/harsh and they were not giving us help"

d) Security

"Light the city and beaches"

"My wallet was stolen and the police did not assist me"

"I lost my watch and money"

"Beach boys everywhere and demanding money"

"I want to relax but I did not feel safe at the beach"

e) **Friendly people and beautiful country**

There were some positive comments on this theme.

"I appreciate the hospitality"

"Very loving and friendly people"

"People are just great here"

"People are very friendly and helpful"

"Met new friends in Kenya"

"The level of service in the hotels is superb"

"Lovely country"

"I love Kenya"

"The scenery is lovely"

"I will come back again"

"Beautiful country, I will love to stay here"

"Nice place to come and relax"

9.3 Non-resident visitor Suggestions

The suggestions were based on the comments on the 5 themes and are made to improve services, satisfaction and experiences: For example,

"Introduce and utilize recycling system"

"Collect and dispose-off garbage appropriately"

"Provide dustbins to ease waste disposal".

"Train service staff at service points (airport, immigration, customer care) with service skills (politeness, courtesy, empathy, speed)".

"KQ management should ensure that all scheduled flight are on time"

CHAPTER 10: CONCLUSION

10.1 Conclusion

More than ½ of the inbound tourists stated that holiday/leisure was the primary reason for visiting Kenya, indicating that they will likely come back to consume mainly natural and cultural heritage. The Kenyan tourist source market remains primarily its traditional markets, though the African market looks promising. The much talked about huge outbound Chinese market was not established in favour of Kenya. The Kenyan tourist market is balanced between the genders (M=51%, F=49%) and significantly aged between 24 and 46 years of age (59%). Visitors reported a high level of education with about 81% reporting post high school qualification.

Overall, about 2 in 5 non-resident visitors spent less than $1,999 and about 3 in 20 spent more than $6,000 led by Canada (40.3%) followed by Australia (23.3%) and most of this was spent on holiday/leisure (75.5%). About (42.8%) sourced information for decisions making from technology and about 1 in 5 from travel agents. Most of the visitors inbounded through the air and 1 in 4 flew KQ, and participated in wildlife viewing at (60.5%) confirming their primary motivation is Wildlife (61.7%). Preparation and planning to visit Kenya took anywhere from 1-6 months of about 50% of non-resident visitors and about 54% stayed from 6-20 days. Conventional accommodation options accounted for about (88.5%). Visitors reported high level of satisfaction with destination Kenya and her products at 74.3% (Satisfied to Very Satisfied), citing Attractions (65%) and Activities (64.1%). All travelling party composition participated in wildlife viewing and 71.3% would likely to very likely revisit Kenya.

Anecdotally, 5 themes emerged in visitor comments: Transportation, cleanliness, service providers, security and, friendly people and beautiful country. The majority of the comments were negative on the 4 themes (Transportation, cleanliness, service providers, security) but very positive on the theme ‘Kenyan people and beautiful country’. Transportation and access issues are critical to Kenya’s tourism industry and must be addressed.

10.2 Observations and suggestions

Since this exit survey was undertaken for a very short period (i.e. 14 days), it was not possible to draw and make recommendations that would inform policy. However, in order to provide information for long term sustainability of tourism, there is need to put into place a conceptual understanding and undertaking between one service provider and TRI for a substantial period of time in order to create memory, consistence and continuity. At the end of the said period, the recommendations that will be drawn will be firmly grounded on consistence and continuity; thus evidently informing policy, planning, development, marketing and service provision.

This study was therefore able to make observations and suggestions (see table 10.1) and not recommendations.

Table 10.1: Observations and suggestions

OBSERVATIONS	SUGGESTIONS
1. A large number of tourists reported using travel agencies for trip arrangement.	1. There is need to find out whether they engage travel agencies online or personal visit to travel offices.
2. Very few visitors use air transport within the country and yet domestic airlines sector is growing (KAA 2017).	2. Ways must be found to include domestic flights as part of travel arrangement in order to benefit the airlines, make movement easy and market the destination
3. Kenya Airways (KQ) has no direct flights from MIA to international destinations leaving that market to chartered flights and foreign airlines.	3. KQ must claim its rightful market as the dominant airline in Kenya by introducing direct flights to international destinations from MIA.
4. Packaged and non-packaged travel arrangements were found to be almost evenly used and the overall expenditures were almost evenly spread.	4. There is need to interrogate the two models in order to develop a policy framework to guide the two models and find better ways to benefit the country
5. Although the Government promotes Kenya as a conference destination, the findings showed that conference consumption was at 3.1% and yet MICE is a growing market.	5. Prepare strategies to develop the MICE products in order to grow and enhance it consumption.
6. Most non-resident visitors used technology to source for information for decision making	6. Marketing initiatives should enhance e-marketing, develop and diversify apps that are consumer friendly to enhance ease access and use by visitors.
7. Negativity about destination Kenya focused on transportation, access, and service provision personnel.	7. a) There is need to lobby government for continuous improvement of roads infrastructure to reduce highways congestion and access to important attractions/facilities. b) In order to retain our reputation as a hospitable country, there is need to ensure continuous (re)training and development of frontline personnel

OBSERVATIONS	SUGGESTIONS
	who interact with visitors for image and impression on destination Kenya generally and specifically immigration, customs, police and customer care personnel.
8. The commonly held view that aged non-resident visitors stay long and spend more was not established.	8. There may be need to interrogate this market which some studies have established that they stay longer, spend more and minimizes seasonality.
9. Overall satisfaction with destination Kenya and the potential of return visits was high.	9. Put strategies in place which will give the destination a competitive edge in terms of; people, processes, physical evidence and packages. Besides, there should be targeted promotions and awareness, good distribution channels, diversified products and competitive pricing to enhance destination Kenya competitive age.

ANNEX I: TOURIST EXIT SURVEY

Point of exit:____

Start time:____

Name of RA:____

Jambo,

The Tourism Research Institute, a research arm of the Ministry of Tourism and Wildlife is currently conducting a **TOURIST EXIT SURVEY**. The information sought by this survey will assist service providers in improving the products and services delivery to meet or exceed your **EXPECTATIONS** thereby enhancing your **POSITIVE EXPERIENCE** in destination Kenya.

Thank you for participating in this survey

SECTION A: Tourist Demographics

1. Nationality ___________________________
2. Country of Residence__________________
3. What is your gender?
   Male [ ]
   Female [ ]
   Other (Specify) ____
4. Your age (Category in Years)
   18-24 [ ]
   25-34 [ ]
   35-44 [ ]
   45-54 [ ]
   55-64 [ ]
   Above 65 [ ]
5. What is the highest level of education you have completed?
   Less than high school [ ]
   High school [ ]
   University degree [ ]
   Some middle level college [ ]
   Masters/Ph.D. [ ]
   Other (Specify) ______________________________________

SECTION B: Trip Characteristics

6. Are you part of?

   Travel group/organization [ ]

   Independent [ ]

Family [ ]

Colleagues/friends [ ]

Other (Specify) ________________________________

7. (a) Have you been to Kenya before?
Yes [ ]
No [ ]

(b) If yes in 7(a) above how many times?

Once [ ]

Twice [ ]

More than twice [ ]

8. What is your primary purpose of your visit?

Holiday/Leisure [ ]

Visiting of Friends and Family [ ]

Business [ ]

Attend a special event [ ]

Conference [ ]

Transit [ ]

Other (Specify) ____

9. How many days have you been away from your country of residence?

<3 days [ ]
4 -5 days [ ]
6 – 10 days [ ]
11 – 20 days [ ]
Above 20 days[ ]

10. How many days have you spent in Kenya?

<3 days [ ]
4 -5 days [ ]
6 – 10 days [ ]
11 – 20 days [ ]
Above 20 days [ ]

11. (a) How did you get to know about destination Kenya?

Social Media [ ]
Internet sites [ ]
Attended conference [ ]
Kenya Tourism board/ Magical Kenya [ ]
Family & friends [ ]
Travel agency/tour operator [ ]
Guide books [ ]
Magazines [ ]
Television [ ]
Information centres [ ]
Previous visit [ ]
Travel exhibitions [ ]
Others (Specify)________________________________

(b) Did you find the information useful? Yes [ ] No [ ]
(c) Explain your answer in 11 (b) above____________________________

12. Who made most of your travel arrangements?

Airline Office [ ]

Family & friends [ ]

Travel agency/tour operator in Kenya [ ]

Travel agency/tour operator outside Kenya [ ]

I arranged most/all of it myself [ ]

Others (Specify)________________________________

13. When did you decide to visit Kenya?

Less than 2 weeks [ ]
2-3 weeks before the trip [ ]
1-3 months before the trip [ ]
4-6 months before the trip [ ]
7-12 months before the trip [ ]
More than 12 months before the trip [ ]

14. (a) What was your mode of transport into Kenya?

Air transport [ ]

Water transport [ ]

Road transport [ ]

(b) Specify the airline you travelled on to Kenya______________________________

15. What was the most important attraction that motivated you to visit Kenya?

Wildlife [ ]

Culture [ ]

Historic sites [ ]

Beach [ ]

The Rift Valley [ ]

Mountains [ ]

Climate [ ]

Shopping [ ]

Friendly people [ ]

Tranquility [ ]

Safety and security [ ]

Other (specify) ____

16. On this trip which activity did you participate in:

Wildlife viewing [ ]
Mountain climbing [ ]

Cultural tours [ ]

Sightseeing [ ]

Hiking [ ]

Shopping [ ]

Roasting [ ]

Preparing traditional food [ ]

Visit to Historical/Archaeological sites [ ]

Bird watching [ ]

Ballooning [ ]

Beach tourism [ ]

Attending a conference [ ]

Other (specify) ______________________________

17. What did you like most about destination Kenya?

Culture [ ]

Beach [ ]

Climate [ ]

Wildlife [ ]

Diversity of attractions [ ]

Variety of tourists activities [ ]

Historical/Archeological sites [ ]

Scenic beauty [ ]

Safety and Security [ ]

Friendly people [ ]

Well-kept environment [ ]

Transportation and ease of access [ ]

Value for Money [ ]

Other (Specify) ______________________________

18. What was your primary mode of transport within destination Kenya?

Tour vehicle [ ]

Private car [ ]

Air plane [ ]

Motor cycle [ ]

Walking [ ]

Bus [ ]

Other (Specify)

____

19. On this trip, which type of accommodation did you use?
Hotel [ ]
Resort [ ]
Lodge [ ]
Cottages [ ]
Campsites [ ]
Friends & relatives [ ]
Guest house [ ]
Homestays/ Airbnb [ ]
Hostels [ ]
Other (Specify)

____

SECTION C: Estimated Tourists expenditure

20. Are you on:
Organized tour package? [ ]
Individual travel arrangement? [ ]

21. What was your total expenditure within destination Kenya?
Currency________________________Amount______________________________

22. Approximately, how much did you spent on each of the following within destination Kenya, where applicable?
Transport: Amount_____________Currency______________
Accommodation: Amount_____________Currency______________
Catering: Amount_____________Currency______________
Shopping: Amount_____________Currency______________
Entertainment: Amount_____________Currency______________
Other (Specify)
____

SECTION D: Future Intentions

23. How likely is it that you will come back to Kenya for your next visit?

Not at all likely	[ ]
Not very likely	[ ]
Somewhat likely	[ ]
Likely	[ ]
Very likely	[ ]

24. What could most likely bring you back to Kenya?

Wildlife	[ ]
Culture	[ ]
Historic sites	[ ]
Beach	[ ]
The Rift Valley	[ ]
Mountain climbing	[ ]
Climate	[ ]
Shopping	[ ]
Friendly people	[ ]
Family & friends	[ ]
Scenery	[ ]
Diversity of attractions	[ ]

Other (Specify____

25. What is your level of satisfaction with the following five key components of tourism?

Use the Key: VD- Very dissatisfied; D- Dissatisfied; SD-somewhat dissatisfied; SS-Somewhat satisfied; S- Satisfied; VS- Very satisfied

	VD	**D**	**SD**	**SS**	**S**	**VS**
Attractions	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]
Accessibility	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]
Accommodation	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]
Amenities e.g food, water	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]

Tourists activities	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]

26. What is your overall satisfaction level with your trip to Kenya?

Very dissatisfied	[ ]
Dissatisfied	[ ]
Somewhat dissatisfied	[ ]
Somewhat satisfied	[ ]
Satisfied	[ ]
Very satisfied	[ ]

27. Would you recommend Kenya to your friends, relatives or colleagues at home?

No, definitely not	[ ]
No, probably not	[ ]
Possibly	[ ]
Yes, probably	[ ]
Yes, definitely	[ ]

28. What were your worst disappointments with destination Kenya?

____

____

____

____

29. What do you think destination Kenya needs to do to enhance your experience?

____

____

____

____

Thank you very much for participating.

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KARIBU TENA