



DOMESTIC TOURISM CONSUMPTION INSIGHTS

Domestic Tourism: Segments & Travel Motivations

Travel Motivations

- Relaxation
- Escape & Rejuvenation
- Discovery
- Recognition / Bragging Rights
- Adrenaline & Thrill
- Social: Bonding & Togetherness
- Romance

Groupings:

- Group Travelers
- Budget Travelers
- Spontaneous Explorers
- Experienced Adventures

Segments

Sassy Explorers: Young and independent, travel for fun as group (friends/investment groups/college mates) to create shared memorable experiences

- 20-25yrs, in business, studying or first job, tech savvy, no responsibility,

“Adventurous Alpha” Males: Young-ish audacious and fun loving affinity group that travel as a pack for adventure and merry making,

- **Alpha Techy Explorers** – 26-34yrs, tech savvy, single/settling, employed or in business, daring, look for thrill/adrenaline rush activities, enthusiast of sporting events like Soccer, Safari Rally & Rugby
- **Alpha Family Defenders** – 35-39 married with kids, rational, employed or in business, travel for thrill, travel as families or friends with families (Investment forums, Golf Course clubs & Networking forums)

“Ambitious high fliers” Females:

- Trendy explorer: 26-34yrs, for travel as a bonded group of sisters for fun, like adventure activities, outgoing and, no financial responsibility, tech savvy
- Sophisticated Traveler: 34-45yrs, married with kids, choosy, spends on exquisite selections, nature travel to relax with family

Families: 30-54yrs, 2-3 kids, KES 100K monthly disposable

Kenyans' Awareness of Diverse Attractions Available in the Country

30 %

Kenyans who have gone for a Holiday Locally

66 %

Percentage of Domestic tourists who Sponsor themselves

71 %

Mainly travel to visit Family and Friends

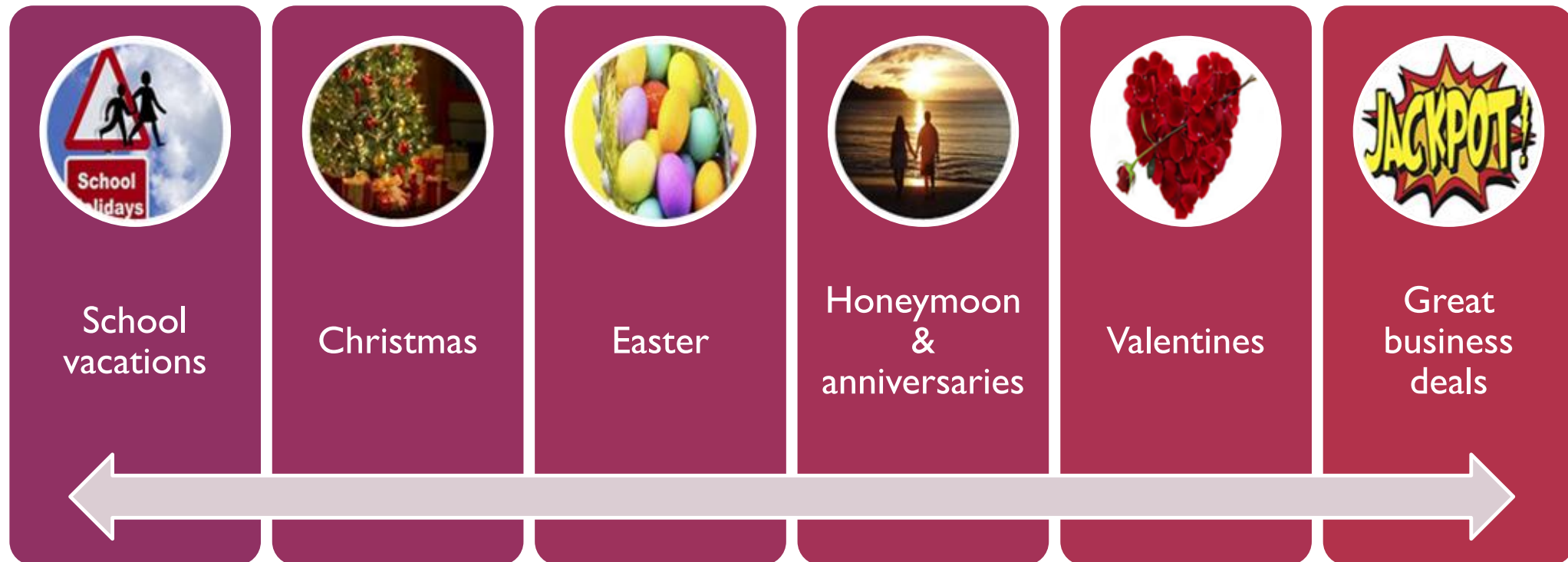
38 %

Transport Expenditure on Domestic Tourism

Domestic Tourism: Seasonality

Seasonality and explanations

Festivities, special occasions and availability of free time greatly influence when people go for holidays. Majority plan for holidays over Easter and Christmas.



Trends: Domestic Market

Destination, affordability and safety are the 3 key considerations for domestic traveler when travelling

- Pricing is highly thought through by men than it is by women; on the other hand females would be more concerned about security

Travelling is highly a spontaneous activity it is either not booked or booked last minute. For those who plan, multiple forms of booking are used and offline reservations are more favored

- Impulsive travelling is skewed to males, those married without children and the 25-40 year olds. 18-24 year olds and those married without children are most likely to book last minute; 1-3 days before travel

Length of stay while on holiday is usually 2 - 3 nights across all holiday seasons



DOMESTIC TOURISM OUTLOOK POST COVID -19

THE DOMESTIC MARKET

The Tourism industry is declining by the day, with it being viewed as a non-essential service during a global pandemic. The service chain in tourism is affected leaving jobs and revenue at a risk.

The Domestic Market presents the best option/prospect for the beginning point of tourism recovery, the domestic traveller will commence travel before either regional or international.

The industry shall therefore need to offer products that suit this segment.

'NEW NORMAL' = A SHIFT IN THE MARKETING MIX

1. Re-segmenting markets – Families (will be comfortable to travel together), Millennials – fearless and yearning for unique experiences and baby boomers (affluent) they have the money to spend on travel and emerging demographics – digital natives
2. Product positioning by psychometrics – Highlights the benefits of travel e.g. wellness, re-energizing oneself, downtime etc. travelers will be more healthy conscious, social distancing, sanitization, self service pay systems, non-contact services as opposed to pricing and cheap offers.
3. Product diversification – to promote the lesser known areas in order to create a new buzz on travel – consumer want to try something new, promote health and wellness products
4. Promotional mix – embrace digital marketing more as most people will communicate through digital technologies - email and SM
5. Continuous education of the experience owners on how best to package their experiences for the domestic traveler

SUPPORT FOR THE CONSUMERS...

Continuous
Sensitization

Right
experiences
& packages

Research-
what, when
and how they
consume
travel

Regular
Engagements

Partnerships

ELIMINATE SEASONALITY



Low Season
promotions



All year Round
Calendar across
the country



Getaway
Packages/
Day trips



Target New
Segments e.g.
Chamas, religious
groups, alumni, AB

