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INBOUND AND OUTBOUND TOURISM EXPENDITURE SURVEY REPORT 2025

August 2026

Where Tourism Money Moves

INBOUND AND OUTBOUND TOURISM EXPENDITURE SURVEY REPORT 2025

AUGUST 2026

FOREWORD

The Government of Kenya places a lot of emphasis on the improvement of the tourism sector in the country. Towards this end, the Kenya National Bureau of Statistics in collaboration with other stakeholders in the tourism sector continues to undertake a series of inbound and outbound expenditure surveys aimed at updating tourism statistics in the country. Availability of quality statistics will not only help in determining the sector's contribution to the economy but will also guide policy makers in taking relevant policy interventions to further improve the tourism industry.

The inbound and outbound expenditure surveys being undertaken in the country to provide key input for estimating international tourism receipts used in compiling National Accounts (NA), Balance of Payments (BOP) statistics and key input for compilation of Tourism Satellite Account (TSA).

This report presents the findings of inbound and outbound tourism expenditure surveys carried out in December 2024 and June 2025. This report provides a key steppingstone towards the establishment of a proper System of Tourism Statistics (STS) in the country, that will in return enable the compilation of quality tourism statistics. The STS will contain data necessary for measuring the demand and supply side of the tourism sector in the country. Further, this will go a long way in providing a framework for the improvement of methods used in estimating the contribution of the tourism sector to the Kenyan economy, hence, enabling formulation of appropriate policies for the tourism sector by the national and county governments.

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ACKNOWLEDGEMENTS

A lot of effort by key stakeholders has been spent in conducting the inbound and outbound tourism expenditure surveys, culminating in writing of this report. The report is a major step in preparing ground for the establishment of a Tourism Satellite Account (TSA) for Kenya. The TSA is an important statistical tool that will enable us to determine the actual value of the tourism sector in the country and will benefit users and producers of tourism statistics both in the private and public sector.

This work is a result of concerted efforts and support from various organizations, namely, Kenya National Bureau of Statistics (KNBS), The Ministry of Tourism and Wildlife (MoTW), Central Bank of Kenya (CBK), Directorate of Immigration Services (DIS), Tourism Research Institute (TRI), Kenya Tourism Board (KTB), Kenya Airport Authority (KAA) and the Kenyatta International Convention Centre (KICC). The participation by these institutions through their representatives in the Tourism Statistics Working Group is much appreciated.

The surveys could not have been successful without the primary role played by the Research Assistants engaged by the Kenya National Bureau of Statistics. Many thanks to them all for their dedication and professionalism. It is also because of the many respondents that were approached by our interviewers who gave information willingly that we have this report in place. Thanks to all of them.

Finally, I would like to express my heartfelt appreciation to KNBS, CBK, KTB, DIS, TRI, KTB, MoTW, KAA and KICC staff members who worked behind the scenes to ensure that the tourism surveys were successfully conducted, and this informative report put in place.

ABBREVIATIONS AND ACRONYMS

CBK	Central Bank of Kenya
DIS	Directorate of Immigration Services
EAC	East African Community
ETA	Electronic Travel Authorization
GDP	Gross Domestic Product
GFCF	Gross Fixed Capital Formation
ITE	Inbound Tourism Expenditure
JKIA	Jomo Kenyatta International Airport
KTB	Kenya Tourism Board
KNBS	Kenya National Bureau of Statistics
KSh	Kenya Shillings
MIA	Moi International Airport
MICE	Meetings, Incentives, Conferences and Exhibitions
OTE	Outbound Tourism Expenditure
RFM	Recommended Methodological Framework
SNA	Systems of National Accounts
STS	Systems of Tourism Statistics
SUT	Supply and Use Tables
TSA	Tourism Satellite Account
TSARMF	Tourism Satellite Account Recommended Methodological Framework
TRI	Tourism Research Institute
UAE	United Arab Emirates
UNSC	United Nations Statistical Commission
UNWTO	United Nations World Tourism Organization
USA	United States of America
VFR	Visiting Friends and Relatives
WTO	World Tourism Organization

EXECUTIVE SUMMARY

Tourism remains a key source of foreign exchange earnings in the country. Given its multiplier effects, it stimulates growth in other sectors such as transport, agriculture, service among others. However, as a country we have not been able to accurately ascertain and quantify this contribution due to lack of credible data.

Availability of up to date and regular flow of tourism statistical information would not only enable the Government to measure tourism's contribution to the economy but will also facilitate appropriate development of policy strategies. In addition, such information will serve as an early warning system. This can only be effectively achieved through implementation of a Tourism Satellite Account.

The Inbound and Outbound Expenditure Survey tracks how travellers spend money on international trips, with inbound expenditure covering goods and services purchased in Kenya by non-resident visitors and outbound expenditure covering goods and services purchased abroad by Kenyan residents, excluding international transportation costs. The survey gathers data from a varied sample of Kenyan residents and non-resident visitors on main expenditure categories such as accommodation, food and beverages, transportation, shopping, entertainment, sightseeing, and miscellaneous expenses. Travel covers stays of any duration without a change of residence; however, stays exceeding one year may still be considered travel when the person is abroad for study or medical treatment. The residence of households is determined according to the centre of predominant economic interest of its members, which is determined by the economic territory in which those members maintain a dwelling or a succession of dwellings that are treated and used by members of the household as their principal dwelling. It is sufficient to be present for one year or more in a territory or to intend to be so to qualify as having a principal dwelling there. (MSITS 2010 and BPM6).

The surveys herein were conducted at the main entry points in Kenya, namely, Jomo Kenyatta International Airport (JKIA), Moi International Airport (MIA), Lunga Lunga, Namanga, Busia, Malaba, Taita Taveta and Isebania border. The periods covered for the survey was December 2024 and June 2025 for both peak and low seasons, respectively.

Inbound and outbound tourism expenditure surveys undertaken in December 2024 revealed that inbound tourists spent an average of KSh 19,025 daily while outbound tourists spent an average of KSh 12,603 daily. In June 2025, inbound tourists spent an average of KSh 19,794 per day while outbound tourists spent an average of KSh 12,392 per day.

In December 2024, the daily average expenditure for inbound tourists on package tours was KSh 40,702 while for non-package tours was KSh 10,883. Similarly, the daily average expenditure for package tours in June 2025 was KSh 49,444 while for non-package tours was KSh 8,766.

The daily mean expenditure for outbound tourists on package tours in June 2025 was KSh 22,429 compared to KSh 28,375 in December 2024 while that of non-package was KSh 9,577 and KSh 9,035 in June 2025 and in December 2024, respectively.

On average, an inbound tourist spends KSh 19,306 per day in Kenya while an outbound tourist spends KSh 12,501 per day.

The average length of stay in Kenya by inbound tourists is 9 nights while outbound tourists outside Kenya is 10 nights.

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CHAPTER 1: BACKGROUND

1.1 Introduction

1.1.1 Tourism Statistics

Tourism statistics are vital for understanding the patterns, growth, and economic impact of the tourism industry in a country. In recognition of this, the Kenya National Bureau of Statistics, in collaboration with The Ministry of Tourism and Wildlife, Central Bank of Kenya, Directorate of Immigration Services, Tourism Research Institute, Kenya Tourism Board, Kenya Airport Authority and the Kenyatta International Convention Centre, conducted the Inbound and Outbound Tourism Expenditure Survey. The goal of this survey was to quantify international tourism through both visitor volume and spending behaviour, thereby improving the accuracy and comprehensiveness of Kenya's tourism statistics.

The Inbound and Outbound Tourism Expenditure Survey focuses on international tourism to provide insights into the number of visitors, their spending patterns, travel preferences, and the overall contribution of tourism to the national economy. It collects opinions, experiences, and suggestions from travellers, both entering and leaving the country, using structured questionnaires administered at various official border points. The inbound component of the survey targets international visitors to assess the revenue generated from foreign tourists and identify behavioral trends. Conversely, the outbound component focuses on Kenyan residents, examining their spending habits abroad to estimate the outflow of domestic wealth through international travel. These insights are crucial for both government and private sector stakeholders to inform policy development, infrastructure planning, and destination marketing.

1.1.2 Tourism Status in Kenya

The tourism sector has shown a significant growth and resilience becoming a major economic pillar in the economy. The recent performance showed a steady rise in both international arrivals and domestic travels, with the number of visitors surpassing pre-pandemic levels as shown in Table 1.1. In 2024, the inbound tourist reached 2.4 million, which was a 14.7 per cent increase from 2023. The growth was supported by key strategic interventions such as relaxed visa policies and ongoing investment in transport and hospitality infrastructure, adoption of digital platforms and aggressive marketing. The Kenyan tourism landscape is broadening with the growing diversification into cruise tourism, cultural tourism, coastal leisure and business and conferences events, which has complimented the wildlife and safari experiences. This expansion reflects an ongoing strategy to enrich the country's tourism products and strengthen year-round visitor interest.

Table 1.1: Inbound and Outbound Tourist, 2015-2024

Number

Tourist	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Inbound	1,459,466	1,666,047	1,778,425	2,027,723	2,035,441	579,561	871,304	1,540,978	2,096,004	2,401,256
Outbound	785,080	838,646	893,610	978,958	1,120,867	562,648	771,227	1,128,792	1,336,958	1,402,524

1.1.3 Concept and definition

Tourism statistics define tourism as "the activities of travellers taking trips to a main destination outside their usual environment for less than one year for any main purpose (business, leisure, or other personal reasons) other than to be employed by a resident entity in the place visited." The "usual environment" refers to the geographical area, though not necessarily contiguous, within which an individual conducts their regular life routines. The 'main purpose of the trip' is defined as the reason without which the trip would not have occurred. This purpose helps determine whether a journey qualifies as a tourism trip and whether the traveller is considered a visitor. If the primary purpose is employment or earning compensation for labour, the trip is not classified as tourism, and the individual is categorized as an 'other traveller.' This applies even if the person travels outside their usual environment for less than twelve months. Consequently, individuals who regularly cross administrative boundaries for work, including seasonal workers in sectors such as agriculture, construction, hotels, restaurants, and other services, are excluded from the visitor category.

According to the TSA: RMF 2008, the main purposes of visit for tourism classification include:

- Leisure, recreation, and holidays
- Visiting friends and relatives
- Business and professional purposes (including study)
- Health treatment
- Religion and pilgrimage
- Other purposes (such as transit travel or transport crew duties)

Tourism is categorized into three main forms based on the relationship to the country of reference:

1.1.3.1 Inbound Tourism

Inbound tourism refers to the activities of visitors who are not residents of the country but travel within its economic territory

1.1.3.2 Domestic Tourism

Domestic tourism refers to the activities of resident visitors traveling within the economic territory of their own country

1.1.3.3 Outbound Tourism

Outbound tourism refers to the activities of resident visitors traveling outside the economic territory of their home country.

These basic tourism components can be combined to define other forms of tourism:

1.1.2.1.1 **Internal Tourism** includes both domestic and inbound tourism, covering the activities of residents and non-residents within the country of reference as part of domestic or international trips.

1.1.2.1.2 **National Tourism** combines domestic and outbound tourism, encompassing the activities of residents both within and outside their home country.

1.1.2.1.3 **International Tourism** consists of inbound and outbound tourism, capturing the activities of residents traveling abroad and non-residents visiting the country.

Following these recommendations, the Kenya National Bureau of Statistics, in collaboration with other stakeholders, has been conducting regular inbound and outbound tourism expenditure surveys during both peak and low seasons. These surveys are carried out at major border points, including Jomo Kenyatta International Airport, Moi International Airport, Lunga Lunga, Namanga, Busia, Malaba, Taita Taveta and Isebania border.

CHAPTER 2: METHODOLOGY

2.1 Description of Methods

This chapter briefly describes the methodology employed in the inbound and outbound tourism expenditure surveys. The concepts and methods used are based on the internationally accepted framework for measuring tourism activity in an economy and follow the international guidelines (TSA RMF, 2008) adopted by the United Nations Statistical Commission (UNSC). The standards are in line with the System of National Accounts 2008 (SNA 2008), on which the Kenyan national accounts statistics are based.

Data was collected by research assistants at the eight major border points for inbound and outbound expenditure surveys. The research assistants were trained on the objectives of the inbound and outbound tourism expenditure surveys, interviewing techniques and other important aspects of the surveys. They were taken through a systematic approach to carrying out the surveys. Emphasis was laid on the importance of thorough understanding of the questionnaires, ensuring data quality by minimizing non-sampling errors and the procedures for filling the questionnaires. The research assistants were also trained on how to ensure that questionnaires are edited for completeness, legibility, and consistency and suggestions for handling potential refusals are made so as to minimize non-response rate.

2.2 Inbound and Outbound Tourism Expenditure Surveys

Interview method was applied to solicit information on the expenditures and other characteristics of international visitors to and from Kenya. Two separate questionnaires were used: one for inbound and another for outbound. Inbound tourists (non-Kenyan residents) were interviewed at departures for two reasons. Firstly, for those traveling by air there was sufficient time at the departure lounge for the research assistants to conduct the interviews. Secondly, interviewing inbound visitors at departure gave information on actual expenditure and length of stay as opposed to estimates based on anticipated expenditures and stay if the visitors were to be interviewed on arrival. For the outbound tourists the interviews were conducted at arrivals i.e. on return to Kenya. This poses a challenge of inconvenience as most travellers are usually tired from the trip and there are no appropriate facilities for the comfort of the respondents during the interviews. However, this was felt to be the best approach as information collected was based on actual expenditures and length of stay.

2.3 Sample Design

This section gives a summary of how the sample of visitors was identified to arrive at consistent and reliable information on the target population as presented in Table 2.1. A good sample is one whose results are representative of the target population. The choice of an optimal sample size is mostly a trade-off between the desired quality and precision of estimates from the survey and on the other hand, the availability of resources (money, personnel, equipment and time).

In the Kenyan context, information on the target population was available from administrative records. Statistics on tourist arrivals and departures are collected administratively by the Directorate of Immigration Services while the Kenya National Bureau of Statistics does the compilation. These statistics give an indication on the tourism volumes through each border point. Based on this information, a determination on the number of respondents per border point is made proportionately. Each border point was assigned a number of research assistants based on the volume of arrivals and departures it handles on average. Research assistants then randomly selected the respondents (visitors) at the assigned border points for both inbound and outbound visitors.

Implicitly, stratification was done in two ways: first the survey was conducted in two phases, first during the low season and then high season to take care of seasonality. The second stratification was through conducting the survey at all the major border points. The different border points had somehow different types of visitors. Border points with small number of visitors and those that were deemed to be insecure were excluded from the surveys.

Table 2.1: Distribution of Sampled Respondents

Number

Border Points	Annual		Sampled	
	Inbound Arrivals 2024	Outbound Departures 2024	Inbound 2024/ 25	Outbound 2024/ 25
JKIA	1,627,837	773,532	2,751	2,783
MIA	204,891	41,073	882	272
Busia Border	173,526	152,472	670	680
Malaba Border	52,269	175,782	395	329
Isebania Border	30,036	20,227	266	318
Lunga Lunga Border	42,135	62,342	345	333
Taveta Border	33,167	19,792	100	130
Namanga Border	139,370	116,984	780	957
Other	98,025	40,320	0	0
Total	**2,401,256**	**1,402,524**	**6,189**	**5,802**

2.4 Editing of Questionnaires and Data Entry

Data collection was conducted using Computer-Assisted Personal Interviewing (CAPI) through the Survey Solutions system. As data were received, a dedicated data quality team continuously monitored the submissions and identified and addressed errors. Data processing commenced with comprehensive data cleaning, which involved checking questionnaire completeness, identifying inconsistencies, correcting invalid or out-of-range values, and treating outliers. For both the inbound and outbound tourism expenditure surveys, all the expenditures reported in foreign currencies were converted into Kenya shilling equivalent using average exchange rates for the period of survey.

2.4.1 Data Analysis

Data analysis for inbound and outbound tourism expenditure survey was done using STATA and Statistical Package for Social Sciences (SPSS) concurrently. During the analysis, two final data sets were used: one for inbound and the other one for outbound.

Initially there were two data sets for each category depending on survey period. There was dataset for December 2024 and June 2025 for both inbound and outbound data. During data cleaning the two sets were merged creating one set for each category.

Cleaning was done to ensure tables generated did not give misleading numbers. To ensure analysis of the survey data used data with minimal errors; the data was scrutinized variable by variable. Frequencies were generated together with linking variables with other related variables to eliminate inconsistencies. After going through all variables, tables based on dummy tables provided by subject matter experts in tourism were generated and used in report writing.

CHAPTER 3: INBOUND TOURISM

3.1 Introduction

This chapter presents the main findings on inbound tourism, with a particular focus on the characteristics and expenditure patterns of international visitors. Inbound tourism refers to the activities of non-resident visitors travelling to the country for purposes such as holidays, business, visiting friends and relatives, study, medical treatment and other personal reasons. Understanding who these visitors are, how they travel, how long they stay and how much they spend is essential for assessing the performance of the tourism sector and its contribution to the economy.

The findings in this chapter highlight the key profiles of inbound tourists, including their region, purpose of visit, mode of transport and length of stay. The analysis further examines their spending behaviour across major expenditure items such as accommodation, transport, meals and drinks, shopping, entertainment and other tourism-related services. By comparing patterns across different periods, visitor segments and purposes of travel, the chapter provides insight into shifts in demand, seasonal variations and emerging trends in inbound tourism. Overall, the outcomes of the survey are the average daily expenditure per person and the average length of stay, which are utilized in the methodology to estimate inbound tourism expenditure.

3.2 Inbound Tourism Expenditure Surveys

Inbound Tourism Expenditure Survey reflects the spend of non-resident visitor, it is one of the TSA demand side surveys aimed at establishing the demand for Kenyan tourism products by non-Kenyan residents, Inbound tourism comprises the tourism of non-resident visitors within the economic territory of the country of reference. Inbound tourists survey is conducted at the end of the trip when travellers have completed their stay in the country, and they have spent on goods and services during their visit. For non-residents, data collection is performed at the exit point when they leave Kenya. Inbound Tourism Expenditure Survey research assistant conducts as many interviews as possible with eligible travellers. The interviews are administered face-to-face using Computer Assisted Personal Interviewing (CAPI).

3.3 Inbound Tourists by Border and Region

The surveys captured a sample of 3,927 and 2,262 tourists in December 2024 and June 2025, respectively. However, for purposes of analysis, the results presented in Table 3.1 (a) and (b) focus on the distribution by border point of entry and region of tourists during the reference period. In December 2024 resident of EAC, Germany and Other Europe were the highest percentage of the sampled visitors at 31.0, 8.2 and 8.1 per cent, respectively. Similarly, in June 2025 the EAC was the highest at 49.3 per cent followed by USA at 7.3 per cent then Middle East at 6.3 per cent.

Table 3.1 (a): Distribution of Respondents by Border Point

Border Point	Dec 2024		June 2025	
	Count	%	Count	%
JKIA	2,000	50.9	751	33.2
MIA	704	17.9	178	7.9
Busia Border	284	7.2	386	17.1
Malaba Border	196	5.0	199	8.8
Isebania Border	157	4.0	109	4.8
Lunga Lunga Border	196	5.0	149	6.6
Taveta Border	63	1.6	37	1.6
Namanga Border	327	8.3	453	20.0
Total	**3,927**	**100.0**	**2,262**	**100.0**

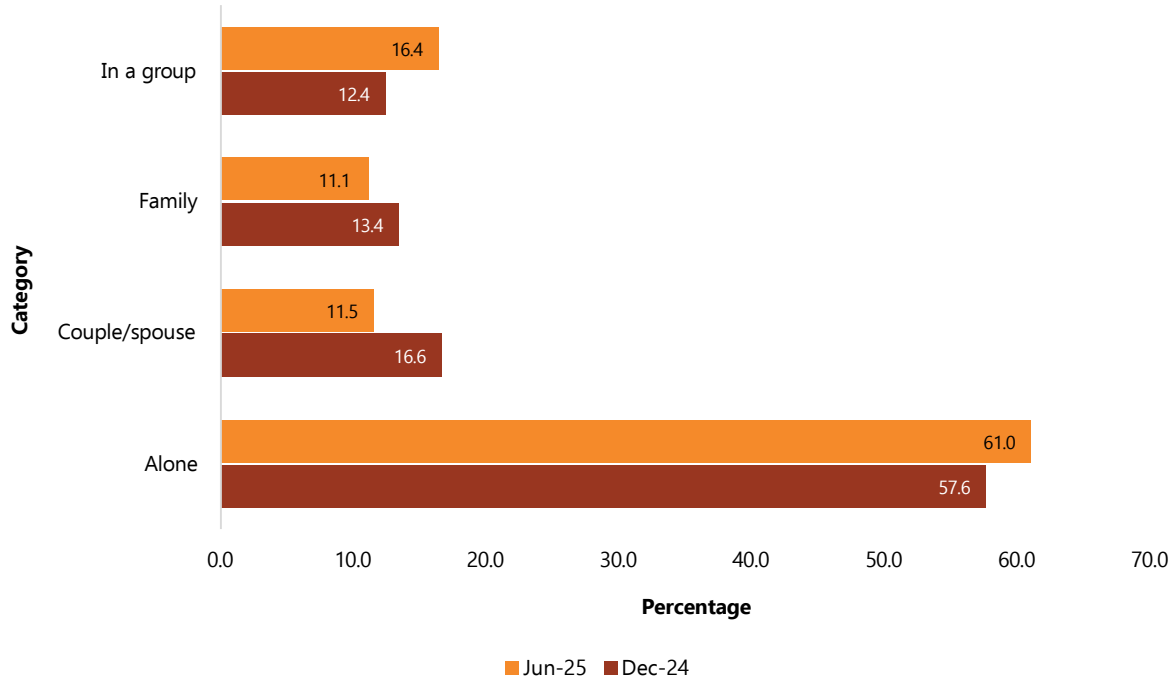
Table 3.1 (b): Sampled Inbound Tourists by Region

Region	Dec 2024		June 2025	
	Count	%	Count	%
EAC	1,218	31.0	1,115	49.3
North Africa	60	1.5	32	1.4
East and Central Africa	188	4.8	92	4.1
West Africa	142	3.6	53	2.3
South Africa	89	2.3	47	2.1
Other Africa	30	0.8	11	0.5
United Kingdom/ Britain	234	6.0	72	3.2
Germany	321	8.2	64	2.8
France	87	2.2	43	1.9
Italy	196	5.0	31	1.4
Switzer land	25	0.6	14	0.6
Scandinavia	95	2.4	23	1.0
Other Europe	318	8.1	99	4.4
U.S. A	231	5.9	164	7.3
Canada	85	2.2	38	1.7
Other America	50	1.3	32	1.4
Japan	22	0.6	6	0.3
India	117	3.0	63	2.8
China	63	1.6	37	1.6
Middle East	127	3.2	142	6.3
Other Asia	83	2.1	32	1.4
Australia	123	3.1	45	2.0
New Zealand	19	0.5	5	0.2
All Other Countries	4	0.1	2	0.1
Total	**3,927**	**100.0**	**2,262**	**100.0**

3.4 Tourists Travelling by Category

Figure 3.1 illustrates tourist traveling by category, of the total number of visitors interviewed, majority of the visitors in both months were travelling alone followed by those travelling as couples. In December 2024, those visitors travelling alone were 57.6 per cent compared to 61.0 per cent in June 2025 in the same category. Travelling as couples and family were more in December 2024 compared to June 2025.

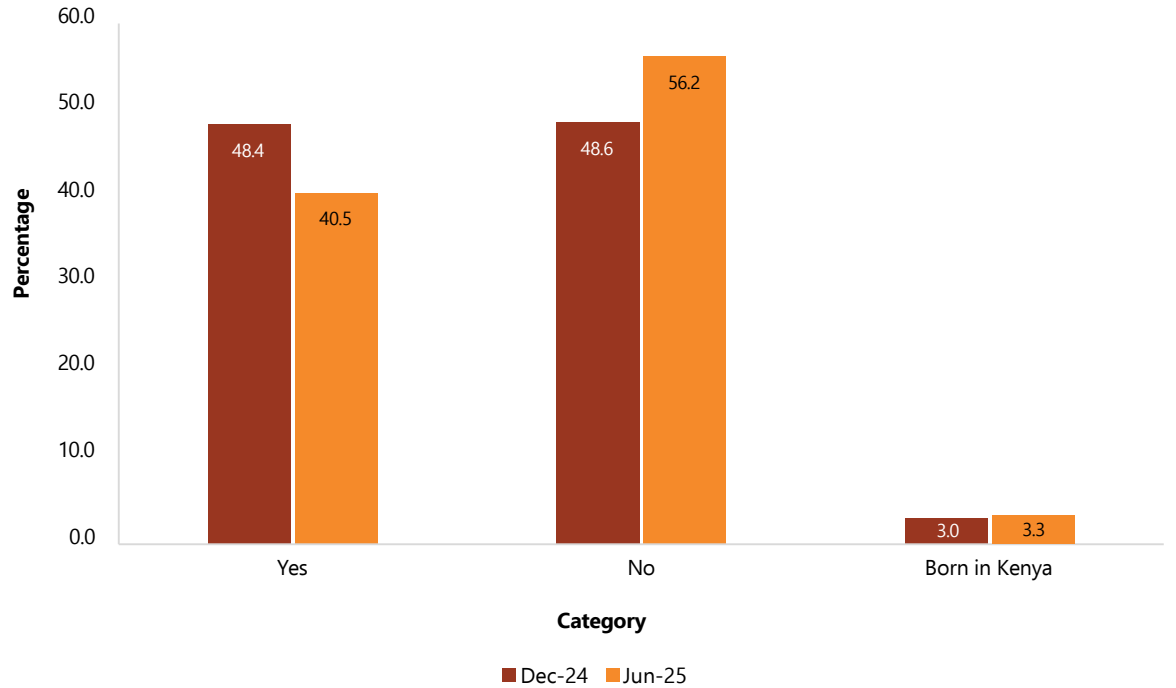
Figure 3.1: Distribution of Persons Travelling by Category



3.5 Repeat Tourists Patterns

Figure 3.2 shows the percentage of repeat visitors falling into three categories for the two seasons of the data collection. In December 2024, the percentage of first-time and repeat visitors were 48.4 and 48.6 per cent, respectively, representing a nearly balanced visitor base. In June 2025, repeat visitors became the clear majority representing 56.2 per cent and first-time visitors taking their share of 40.5 per cent. The percentage of tourists Born in Kenya is a small segment of the overall visitors and shows 3.0 per cent in December 2024 and 3.3 per cent in June 2025. This likely represents tourists visiting home, friends and relatives.

Figure 3.2: Repeat Tourists



3.6 Repeat Visits by Region

In December 2024, residents from India, Switzerland and Canada had the highest number of repeat visits at 11, 10 and 9 visits, respectively, as shown in Table 3.2. However, in June 2025 residents from Australia, Italy, India and Switzerland exhibited the same scenario of 14, 12, 9 and 9 visits, respectively.

Table 3.2: Repeat Visits by Region

Number

Region	Dec 2024	June 2025
EAC	8	6
North Africa	7	5
East and Central Africa	7	6
West Africa	5	5
South Africa	7	5
Other Africa	5	3
United Kingdom/ Britain	6	5
Germany	8	4
France	4	5
Italy	8	12
Switzer land	10	9
Scandinavia	5	3
Other Europe	8	8
U.S. A	7	6
Canada	9	4
Other America	3	5
Japan	2	5
India	11	9
China	3	6
Middle East	5	5
Other Asia	7	2
Australia	5	14
New Zealand	3	3
All Other Countries	1	
Total	**7**	**6**

3.7 Tourists by Sex

Distribution of tourists by sex in the two months indicates a consistent trend. In both months, most tourists visiting are male. In December 2024 and in June 2025 male tourists accounted for 63.8 and 64.8 per cent, respectively, while female tourists accounted for 36.2 and 35.2 per cent, respectively, in December 2024 and in June 2025 as shown in Figure 3.3. This scenario is similar by region as presented in Table 3.3.

Figure 3.3: Distribution of Visitors by Sex

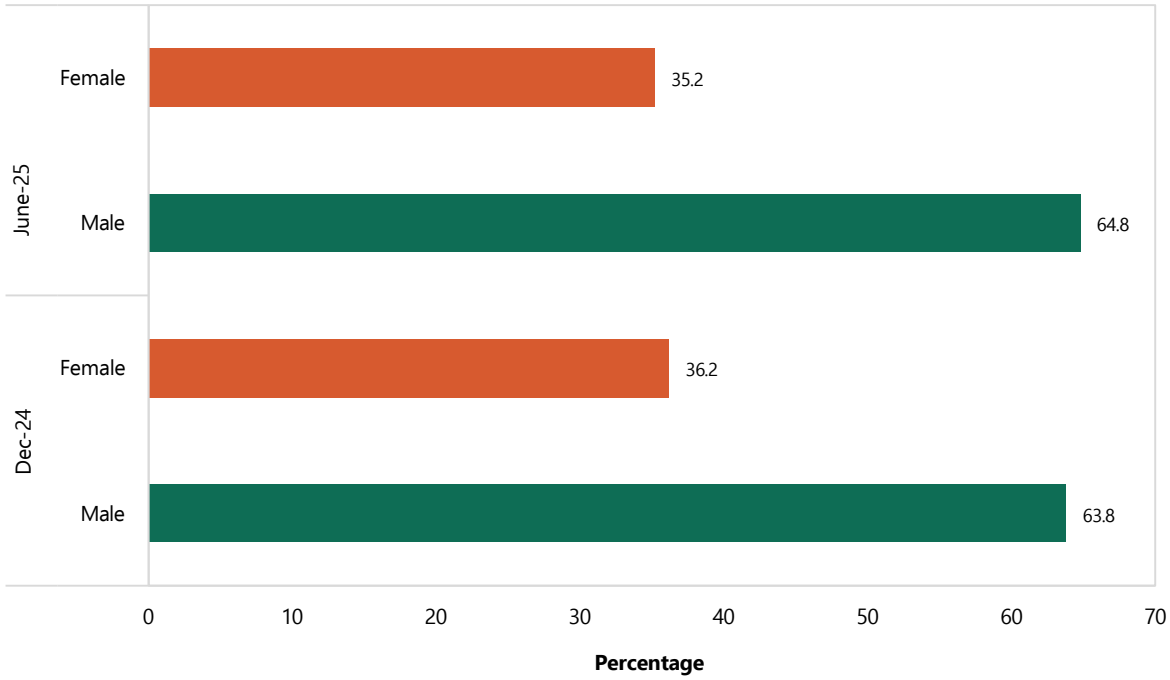


Table 3.3: Distribution of Visitors by Region and Sex

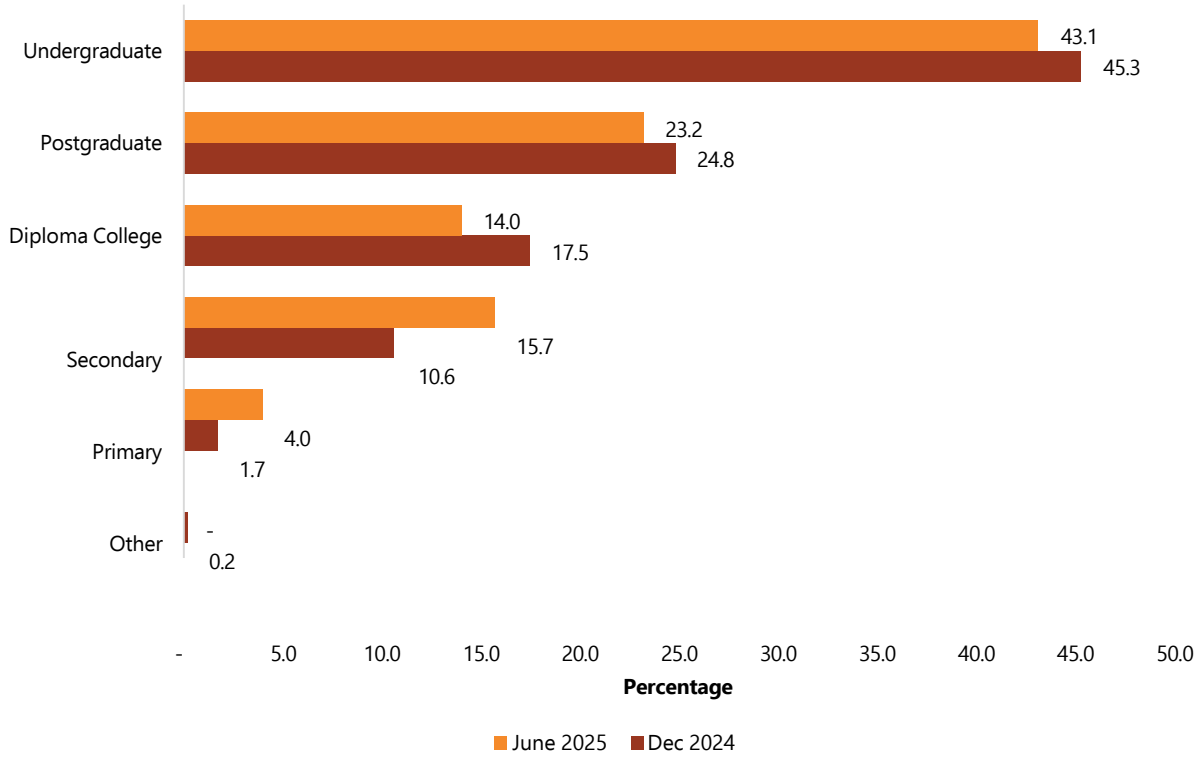
Per cent

Region	Dec 2025		June 2026	
	Male	Female	Male	Female
EAC	32.7	28.1	50.1	47.8
North Africa	1.9	0.9	1.4	1.5
East and Central Africa	4.7	5.0	3.6	4.9
West Africa	4.2	2.6	2.6	1.9
South Africa	2.0	2.7	2.1	2.0
Other Africa	0.6	1.1	0.5	0.4
United Kingdom/ Britain	5.2	7.3	2.9	3.6
Germany	8.4	7.7	3.2	2.1
France	2.2	2.3	1.6	2.4
Italy	4.1	6.5	1.2	1.6
Switzerland	0.6	0.8	0.7	0.5
Scandinavia	2.1	3.0	1.2	0.8
Other Europe	7.9	8.5	4.2	4.8
U.S.A	5.2	7.0	6.1	9.3
Canada	1.8	2.9	1.6	1.8
Other America	1.2	1.3	1.0	2.3
Japan	0.6	0.6	0.3	0.1
India	3.6	1.9	3.4	1.6
China	1.8	1.2	1.6	1.8
Middle East	3.6	2.6	7.2	4.6
Other Asia	2.4	1.5	1.3	1.6
Australia	2.8	3.8	1.9	2.1
New Zealand	0.4	0.6	0.1	0.4
All Other Countries	0.1	0.1	0.1	0.1
Total	**100.0**	**100.0**	**100.0**	**100.0**

3.8 Level of Education

Figures 3.4 show the percentage of visitors interviewed by level of education. In both December 2024 and June 2025, majority of visitors interviewed hold a university-level degree. The undergraduate and postgraduate categories accounted for 45.3 and 24.8 per cent in the month of December 2025, respectively, in addition diploma college accounted 17.5 per cent during the same period. Undergraduate is the single largest group for both sexes this was followed by postgraduate then diploma college then secondary. Similarly, in the June 2025 survey, 43.1 and 23.2 per cent of the respondents had attained undergraduate and postgraduate level of education, respectively.

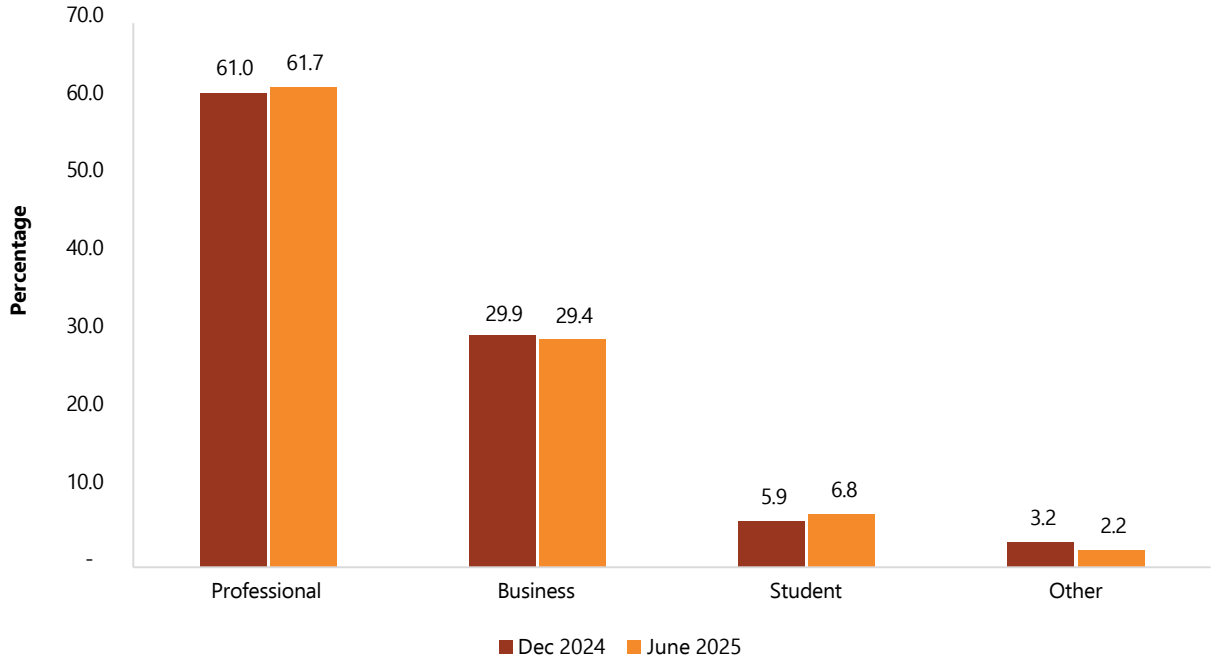
Figure 3.4: Visitors Level of Education



3.9 Occupation by Sex

Majority of the visitors interviewed in both months were professional in diverse fields followed by business people as shown in Figure 3.5. In December 2024 survey, 61.0 per cent of respondents were professional followed by business tourist at 29.9 per cent. Similarly, in June 2025 survey, 61.7 per cent of respondents were professionals and 29.4 per cent being business people. The findings from the month of June 2025 show higher proportions of professional people and students compared to those in December 2024.

Figure 3.5: Visitors Level of Occupation



3.10 Tourists Mean Age

Survey data show that Kenya is visited by middle-aged tourists with a mean age of 39 years. The highest mean age was recorded by the visitors from New Zealand at 44 years in December 2024 while the lowest mean age was recorded by residents of South Africa, EAC and China at 36 years. Similarly, in June 2025 the highest mean age was recorded from New Zealand at 56 years, and lowest mean age was recorded by resident of EAC region at 37 years as depicted in Table 3.4.

Table 3.4: Visitors Mean Age by Region

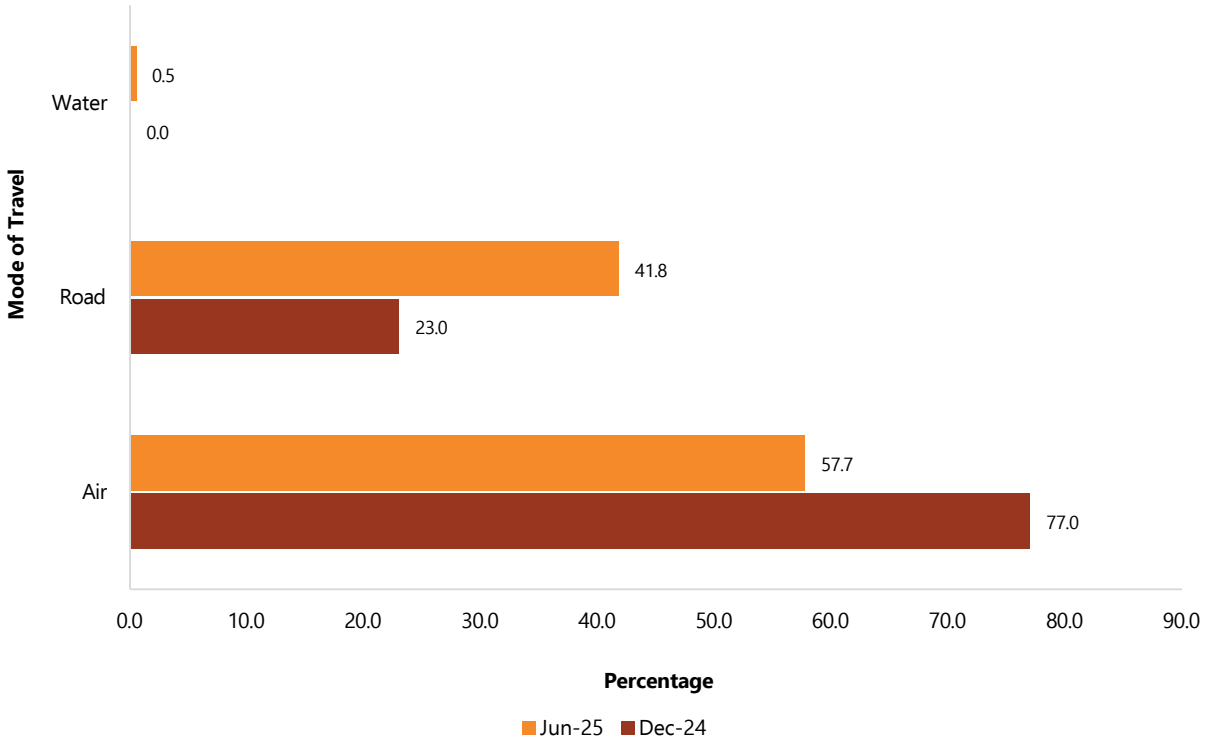
Number

Region	Dec 2024	June 2025
EAC	36	37
North Africa	40	40
East and Central Africa	37	39
West Africa	39	38
South Africa	36	39
Other Africa	36	41
United Kingdom/ Britain	43	41
Germany	42	42
France	40	40
Italy	41	43
Switzerland	38	39
Scandinavia	43	41
Other Europe	38	41
U.S.A	42	45
Canada	40	43
Other America	43	38
Japan	38	42
India	40	39
China	36	40
Middle East	40	41
Other Asia	39	38
Australia	40	45
New Zealand	44	56
All Other Countries	49	48
Total	**39**	**39**

3.11 Mode of Travel

Figure 3.6 indicates that in both months' air was the main mode of transport, this suggests that majority of international visitors flied into the country, this is likely due to convenience, speed, and the availability of international flight connections to Kenya's major airports such as Jomo Kenyatta International Airport and Moi International Airport. In December 2024, air travel accounted for 77.0 per cent of total arrivals, indicating that during the high tourism season, most visitors arrived by air possibly due to holiday travel and the influx of long-haul tourists from overseas markets while in June 2025 was 57.7 per cent. The second mode of travel used by inbound tourists was road, which accounted for 23.0 and 41.8 per cent in December 2024 and June 2025, respectively. Less than one per cent of the inbound tourist used water as mode of travel.

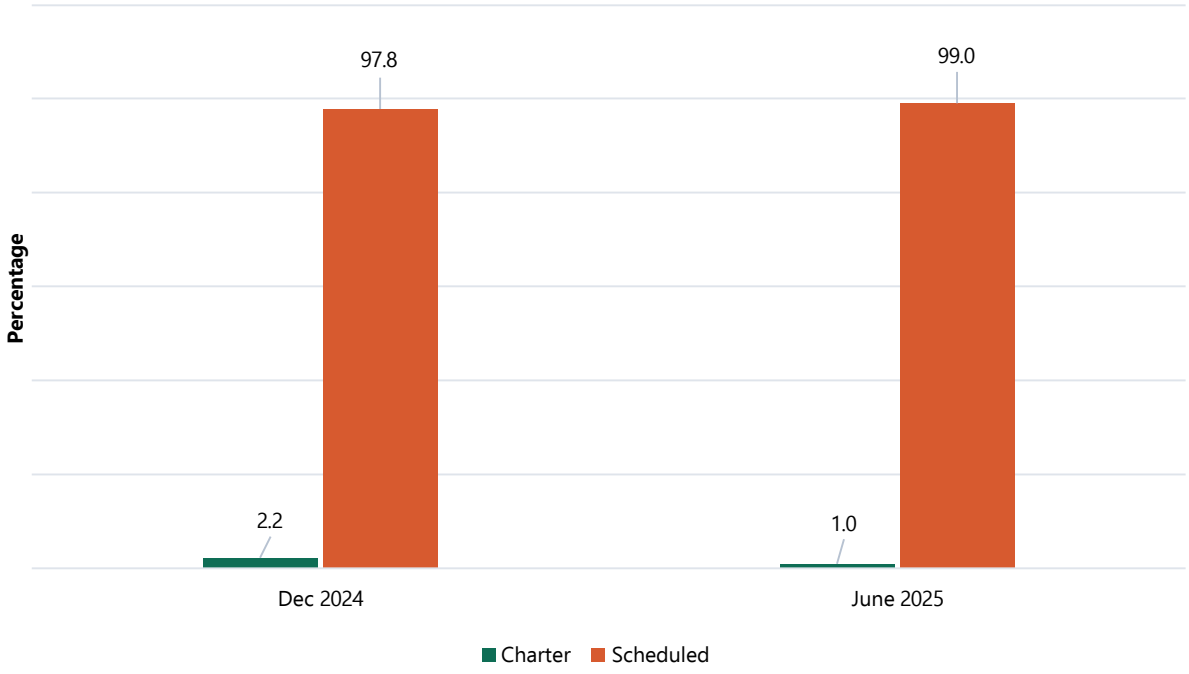
Figure 3.6: Mode of Travel



3.12 Type of Flight

The survey revealed that 97.8 per cent of tourists who travelled by air, used scheduled flights while 2.2 per cent used charter flights in December 2024. Likewise, in June 2025 the trend was 99.0 and 1.0 per cent used scheduled and charter flights, respectively, as illustrated in Figure 3.7.

Figure 3.7: Type of Flight



3.13 Type of Airline

Majority of the visitors who used air transport in December 2024 used Kenya Airways (28.5%) followed by Ethiopian Airlines (13.1%) then Lufthansa Airline (8.7%) and Qatar Airlines (6.5%). Similarly in June 2025,

Kenya Airways (24.1%) took the largest share followed by Ethiopian Airlines (14.4%) then Turkish Airlines (8.0%) and Qatar Airlines (7.7%), in that order as illustrated in Figures 3.8 (a) and 3.8 (b).

Figure 3.8 (a): Type of Airline, December 2024

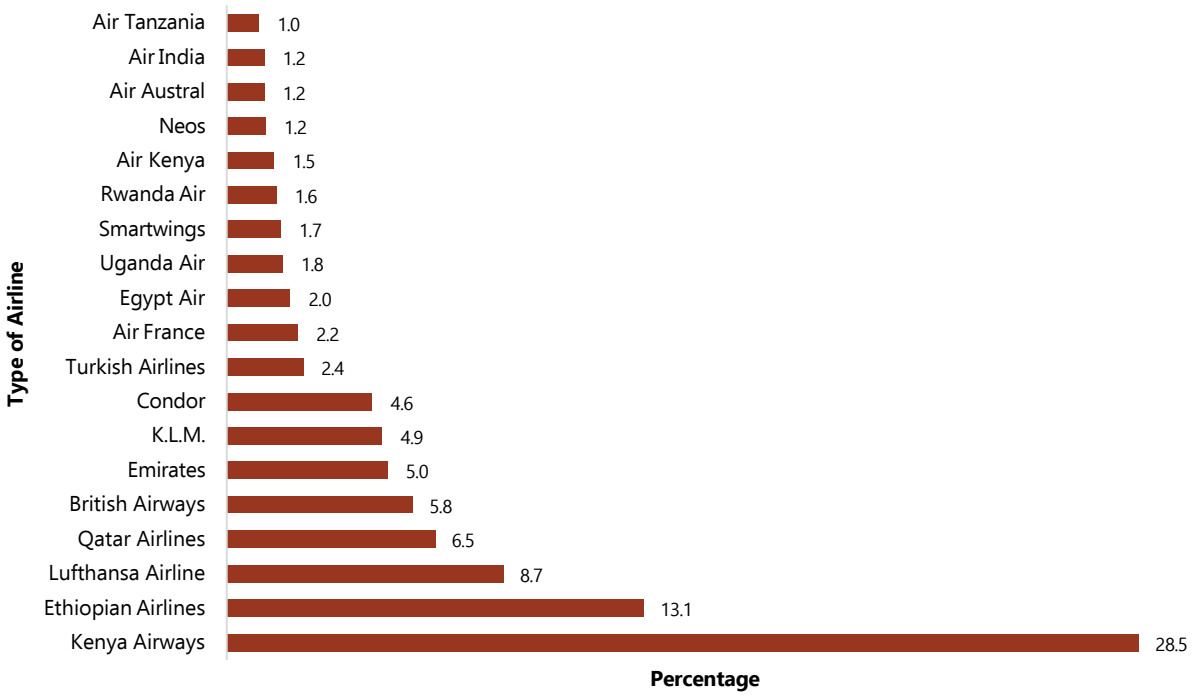
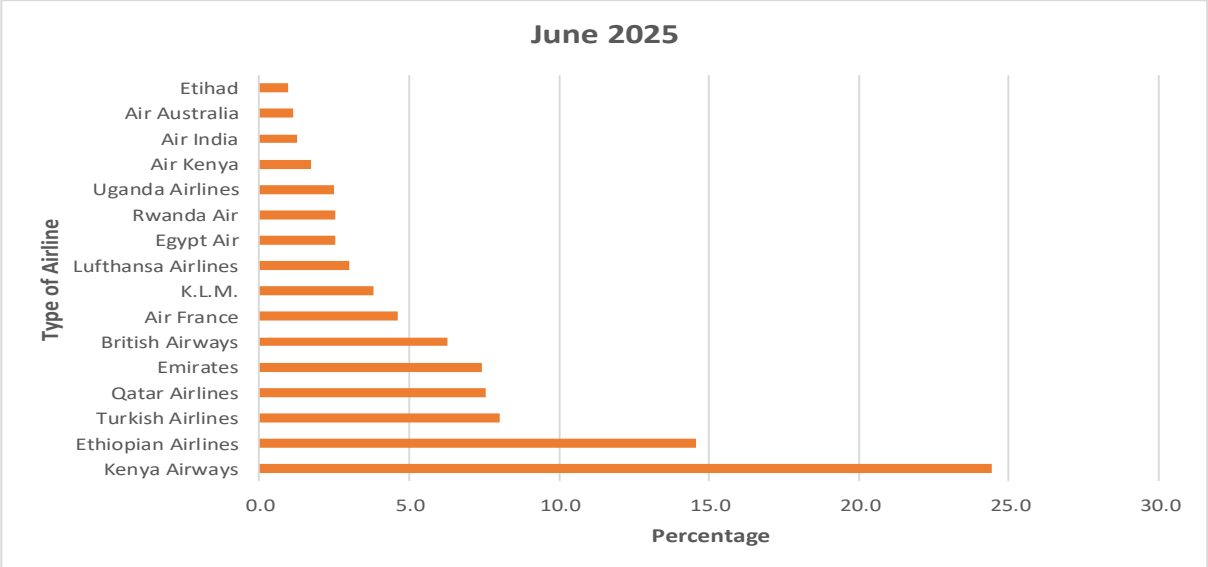


Figure 3.8 (b): Type of Airline, June 2025



3.14 Length of Stay by Tourists

The length of stay by inbound visitors is defined as the number of nights spent within a destination's boundaries for any purposes of visit and is foundational parameter in international tourism measurement, length of stay is a critical dimension of inbound tourism as it directly influences the level of expenditure. Analyzing length of stay helps to identify segments such as short-stay and long-stay visitors, understand seasonal patterns, and assess how different markets and purposes of travel influence the duration of visits.

The number of nights spent in a destination has a bearing on the overall expenditure and earnings in that destination. Table 3.5 (a) shows the average length of stay in Kenya by tourists from different regions was 9 and 8 nights in December 2024 and June 2025, respectively. Residents from Switzerland, Germany and North Africa region averagely spent 13, 12 and 12 nights, respectively, in Kenya in December 2024. Similar trend was observed in June 2025 as residents from Italy, Scandinavia and North Africa, regions averagely spent the highest number of nights at 12, 11 and 11, respectively.

Table 3.5 (a): Average Length of Stay by Region

Number

Region	Dec 2024	June 2025	Total
EAC	8	7	7
North Africa	12	11	12
East and Central Africa	8	7	8
West Africa	9	8	8
South Africa	11	10	11
Other Africa	8	10	9
United Kingdom/ Britain	10	10	10
Germany	12	8	11
France	10	8	9
Italy	10	12	10
Switzerland	13	10	11
Scandinavia	11	11	11
Other Europe	11	9	10
U.S. A	11	6	9
Canada	10	7	9
Other America	9	8	9
Japan	9	10	9
India	9	9	9
China	7	8	7
Middle East	11	9	10
Other Asia	8	6	7
Australia	11	7	10
New Zealand	8	6	8
All Other Countries	7	6	6
Total	**9**	**8**	**9**

3.15 Length of stay by Region and Purpose

The survey results show in Table 3.5(b) that the average length of stay by region and purpose of visit indicate notable differences across the regions and motives for travel. Overall, the survey shows visitors whose purpose of travel was second residence, Visiting Friends/Relatives, study and holiday/leisure stayed longest at 11, 10, 9 and 9 nights, respectively. Average length of stay for business/professional, sport event and religion/pilgrimage were 8 nights each.

Table 3.5 (b): Average Nights by Region and Purpose

Region	Meeting/ Incentive/ Conference/ Exhibition (MICE)	Business/ Professional	Study/ Student	Holiday/ Leisure	Shopping	Cultural Event	Sport Event	Second Residence	Visiting Relatives/ Friends	Health/ Treatment	Religion/ Pilgrimage	In Transit	Total
EAC	6	6	10	7	4	7	7	10	9	7	7	4	7
North Africa	8	12		13					18				12
East and Central Africa	7	8	7	8		8	9	13	10	5	8	1	8
West Africa	7	8	6	10	1	6	8		10		14	1	8
South Africa	7	10	12	13		6		14	12		5	2	11
Other Africa	7	8		12			6		6	20	7	1	9
United Kingdom/ Britain	7	10	8	10	6	5		17	13			1	10
Germany	7	7	7	11		8		14	16			1	11
France	10	9		10	6	9		8	9		10	1	9
Italy	8	8		10	11	31		16	14	3	11		10
Switzer land	8	12		11					20				11
Scandinavia	8	11	7	11			7	7	13		10		11
Other Europe	8	11	6	10		8	20	9	12		5	1	10
U.S.A	10	9	10	9	12	4	4	11	13	9	7	1	9
Canada	7	8		9					13		3	1	9
Other America	12	9	6	9			6		9			1	9
Japan	6	10	12	10					8			1	9
India	9	7	14	8	4	3		16	11	16	22		9
China	7	8	3	6	6			13	11	7		1	7
Middle East	7	10	15	11			11	6	11		12	1	10
Other Asia	4	9	4	6		24	5		13	6	5	1	7
Australia	8	12	5	10		4			12	3			10
NewZealand		11	3	8									8
All Other Countries	4	5		6					11				6
Total	**7**	**8**	**9**	**9**	**5**	**7**	**8**	**11**	**10**	**7**	**8**	**2**	**9**

3.16 Average Nights Spent by Mode of Travel

The survey shows that inbound tourist whose mode of transport is air spend more time in Kenya than the other mode of travel as shown in the table 3.5(c). In December 2024, the average nights spent by the inbound tourist who travelled by air was 10 nights, followed by visitors who travelled by road at 7 nights. Similarly, in June 2025, those who travelled by water averagely spent 9 nights in the country, followed by those who travelled by air at 8 nights and those who travelled by road averaged 7 nights.

Table 3.5 (c): Average Nights Spent by Mode of Travel

Number

Mode of Travel	Dec 2024	June 2025	Total
Air	10	8	10
Road	7	7	7
Water		9	9
Total	**9**	**8**	**9**

3.17 Main Purpose of Visit

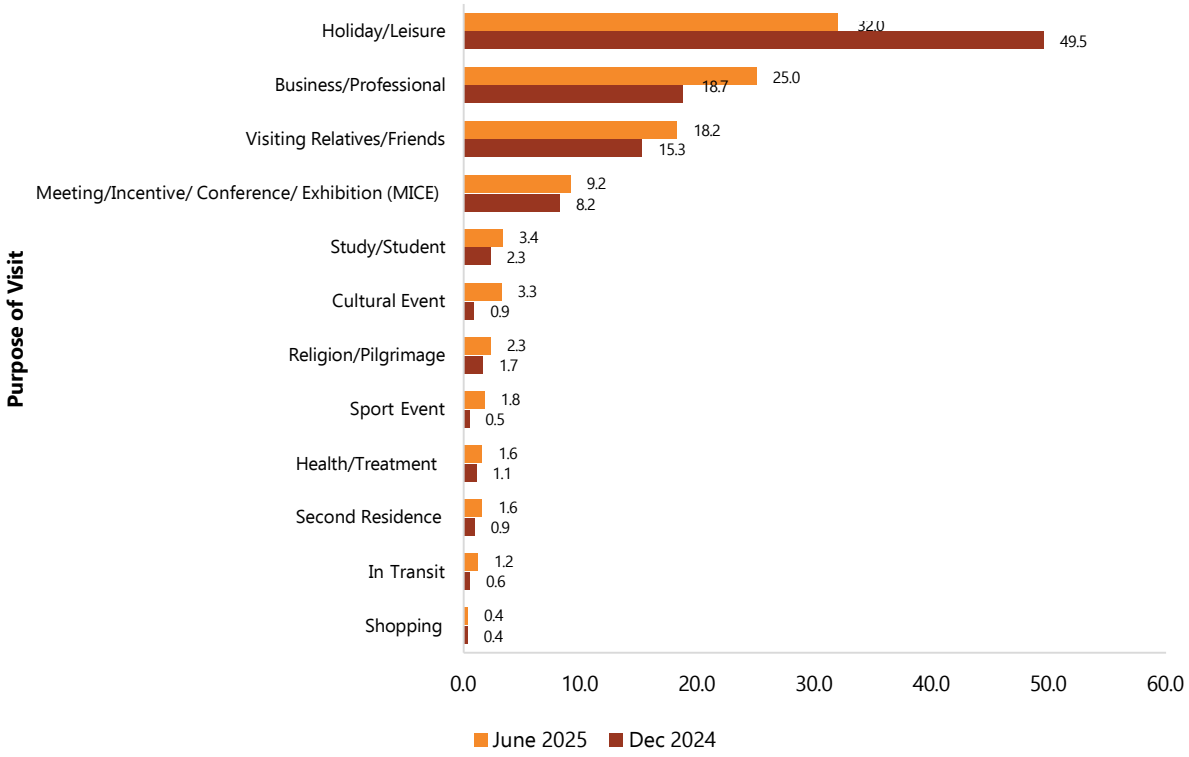
The main purpose of visit is a key aspect of inbound tourism as it provides insight into the primary motivations driving international travellers to a destination. The main purpose of visit also influences the type and level of expenditure, length of stay, choice of activities, and overall experience of the visitor. Table 3.6 illustrates the main reasons tourists visit Kenya during the survey period under review. In December 2024 holiday/leisure was found to be the leading purpose of visit to Kenya at 49.5 per cent followed by business/professional at 18.7 per cent then Visiting Friends/Relatives (VFR) at 15.3 per cent and Meetings Incentives Conferences and Exhibitions (MICE) at 8.2 per cent. Similarly, in June 2025 holiday/leisure was the most popular purpose of visit at 32.0 per cent followed by business/professional at 25.0 per cent then VFR at 18.2 per cent and MICE at 9.2 per cent. This phenomenon is also illustrated in Figure 3.9.

Table 3.6: Main Purpose of Visit

Per cent

Main Purpose of Visit	Dec 2024			June 2025		
	Male	Female	Total	Male	Female	Total
Meeting/ Incentive/ Conference/ Exhibition (MICE)	9.3	6.3	**8.2**	9.9	7.8	**9.2**
Business/ Professional	21.5	13.8	**18.7**	29.2	17.3	**25.0**
Study/ Student	2.2	2.5	**2.3**	2.4	5.1	**3.4**
Holiday/ Leisure	47.1	53.8	**49.5**	31.1	33.6	**32.0**
Shopping	0.4	0.2	**0.4**	0.3	0.6	**0.4**
Cultural Event	1.1	0.6	**0.9**	3.4	3.0	**3.3**
Sport Event	0.6	0.2	**0.5**	2.1	1.3	**1.8**
Second Residence	0.8	1.1	**0.9**	1.3	2.1	**1.6**
Visiting Relatives/ Friends	13.6	18.2	**15.3**	15.3	23.6	**18.2**
Health/ Treatment	1.2	0.9	**1.1**	1.3	2.1	**1.6**
Religion/ Pilgrimage	1.8	1.5	**1.7**	2.5	2.0	**2.3**
In Transit	0.4	0.8	**0.6**	1.2	1.4	**1.2**
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Figure 3.9: Main Purpose of Visit



3.18 Activities Engaged by Tourists

In addition to their primary purpose of visit, tourists often engage in a variety of secondary or supplementary activities during their stay, which contribute significantly to the overall tourism experience and expenditure. Tourists visiting Kenya engage in a wide range of activities that shape their travel experience and contribute significantly to the economy. Visitors come for a specific purpose; they end up engaging in multiple tourism activities as shown in Table 3.7. In December 2024 about 38.3 per cent of the respondent visited national parks/game reserves this was followed by sightseeing and visiting friends/relatives at 35.8 and 28.2 per cent of all respondents, respectively. Similarly, in June 2025, 32.7 and 30.8 per cent of the respondent came for sightseeing and visiting friends/relatives, respectively.

Table 3.7: Activities Engaged in while in Kenya

Per cent

Activities Engaged In	Dec 2024	June 2025
Business	13.6	19.5
Visiting Friends/ Relatives	28.2	30.8
Cultural Event	10.1	7.2
Attend Sport	4.3	6.5
Sightseeing	35.8	32.7
Visit National Parks/ Game Reserves	38.3	28.3
Visiting Museums	13.8	13.0
Visiting Heritage Sites	13.5	10.0
Visiting Beaches	27.7	15.6
Night life	19.6	13.4
Shopping	27.2	17.5
Other	4.6	8.0

3.19 Type of Tour

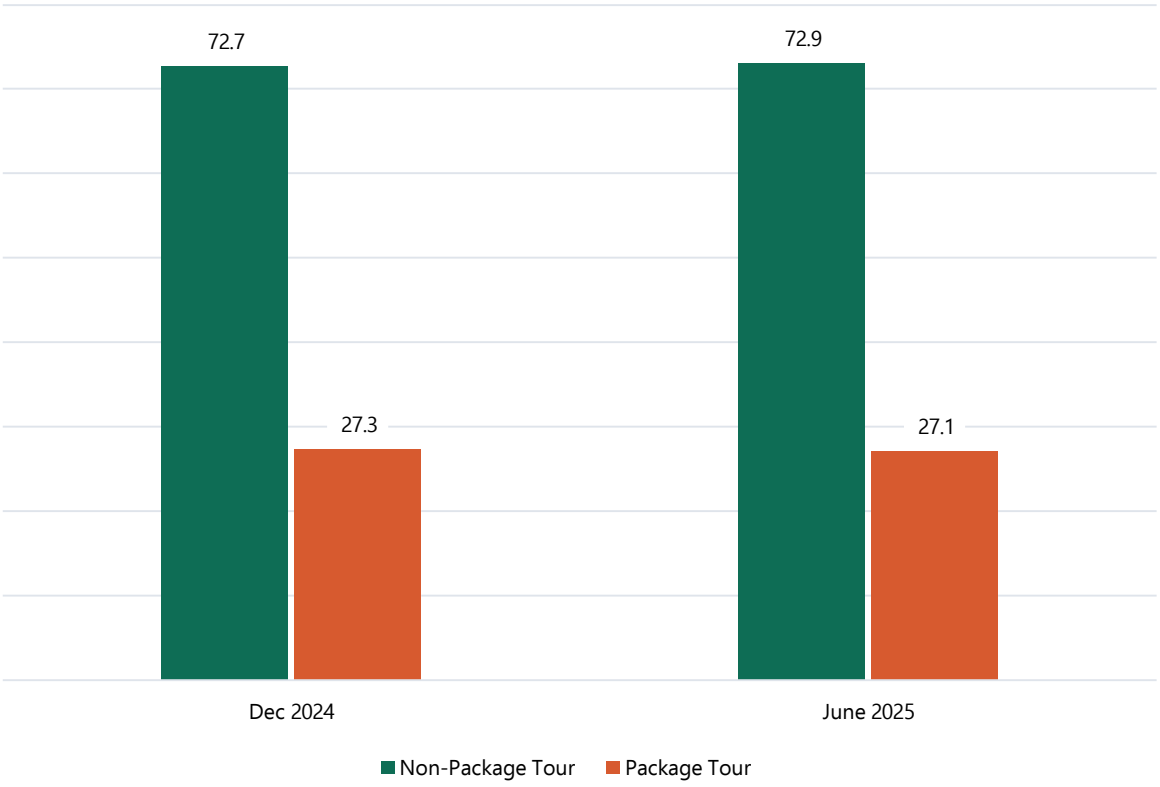
Inbound tourists can travel either as part of a packaged tour or independently through non-packaged arrangements, and the type of tour significantly affects their travel experience and spending patterns. Packaged tours are organized by tour operators and typically include flights, accommodation, transfers, meals, guided excursions, and entry fees, offering convenience and structured itineraries at an inclusive price, which are particularly attractive to first-time visitors or those seeking hassle-free travel. Non-packaged tours, on the other hand, allow tourists to plan their own transport, accommodation, and activities, providing greater flexibility and personalized experiences while often dispersing expenditure across a wider range of services and regions. The package and non-package types of tourism have implications on the tourist expenditure patterns and earnings retained within an economy. Table 3.8 shows distribution of visitors by type of tour. As illustrated, most of the visitors travelling to Kenya are on non-package tours in both months. 72.7 per cent of the visitors travelled on non-package tour in December 2024 compared to 27.3 per cent who travelled on package tour in the same month. Visitors who travelled on non-package tour in June 2025 accounted for 72.9 per cent while 27.1 per cent travelled on package tours as also shown in Figure 3.10.

Table 3.8: Distribution of Visitors by Type of Tour

Per cent

Name of Tour	Dec 2024	June 2025
Non- Package Tour	72.7	72.9
Package Tour	27.3	27.1
Total	**100.0**	**100.0**

Figure 3.10: Distribution of Visitors by Type of Tour



3.20 Package Tour Inclusion

Table 3.9 presents items included in package tours. Accommodation, meals, transportation within the country and drinks recorded higher percentages of items included in package tours in both December 2024 and June 2025. In December 2024, accommodation, meals, transportation in Kenya and drinks recorded 95.7, 95.2, 83.7 and 83.0 per cent, respectively. Accommodation remained the most included item of package tour in June 2025 at 95.9 per cent, followed by meals at 94.9 per cent then transportation within the country at 86.3 per cent.

Table 3.9: Package Tour Inclusions

Per cent

Tour Inclusions	Dec 2024	June 2025
Accommodation	95.7	95.9
Meals	95.2	94.9
Transportation in Kenya	83.7	86.3
Drinks	83.0	82.8
National Parks/ Reserves / Sanctuary	60.3	58.5
International Return Fares	49.4	40.8
Sightseeing	38.8	32.5
Museums/ Heritage Sites	28.9	26.0
Electronic Travel Authorization	17.6	32.2
Cultural Events	16.4	8.0
Event/ Conference	6.3	9.0
Other	1.6	1.1
Total	**100.0**	**100.0**

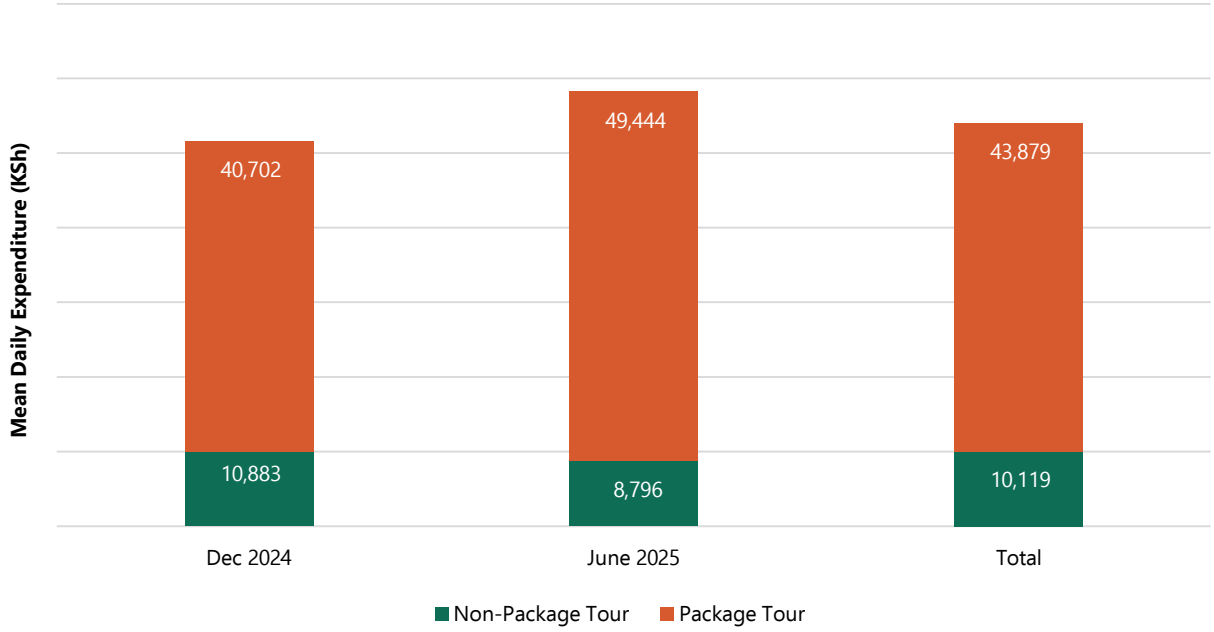
3.21 Tourist Expenditures

Tourist expenditure is a central component of inbound tourism as it reflects the actual economic impact of international visitors on the host country. It comprises spending on a wide range of goods and services, including accommodation, transport, food and drinks, shopping, entertainment, tour services, and other travel-related activities. The level and pattern of tourist spending are influenced by factors such as purpose of visit, length of stay, type of tour (package or non-package), country of residence and season of travel.

3.21.1 Daily Average Expenditure by Type of Tour

Figure 3.11 shows the summary of daily average expenditure for package and non-package tours as well as the overall daily average expenditure in the two months. In December 2024, the survey results show a substantial difference between the two categories, daily average expenditure for package tours was KSh 40,702 while for non-package tours was KSh 10,883. Similarly, the daily average expenditure for package tours in June 2025 was KSh 49,444 while for non-package tours was KSh 8,796. When considering the overall performance across the two months, the daily average expenditure for package and non-package was KSh 43,879 and KSh 10,119, respectively. The consistent pattern of significantly higher daily spending by package tourists compared to independent travellers is attributable to the latter's preference for budget-friendly expenditure items, their self-management of all logistical details, and their tendency to forego certain activities or high-cost services which would collectively result in a considerably low expenditure.

Figure 3.11: Daily Average Expenditure by Type of Tour



3.21.2 Daily Average Expenditure

Table 3.10 gives details of daily average expenditure in Kenya by Region. Residents from New Zealand were the highest spending KSh 39,771 daily followed by those from West Africa spending KSh 30,820 then those from Canada spending KSh 29,714 while the lowest were those from EAC region spending KSh 8,090 in December 2024. In June 2025, the highest were residents from New Zealand spending KSh 78,095 followed by those from USA spending KSh. 60,141 then those from Australia spending KSh. 48,230 while the least spenders were those from EAC region spending KSh 7,130. Overall, residents from New Zealand were the highest spending KSh 47,755 daily followed by those from USA spending KSh 40,355 then those from Canada spending KSh 29,473 while the lowest were those from EAC region spending KSh 7,631. On average, an inbound tourist spends KSh 19,306 per day in Kenya.

Table 3.10: Daily Average Expenditure by Region

KSh

Region	Dec 2024	June 2025	Total
EAC	8,090	7,130	7,631
North Africa	24,086	13,381	20,363
East and Central Africa	20,315	19,253	19,966
West Africa	30,820	20,078	27,900
South Africa	20,039	18,781	19,604
Other Africa	19,622	20,316	19,808
United Kingdom/ Britain	25,690	35,137	27,913
Germany	19,137	35,089	21,789
France	29,686	27,099	28,830
Italy	23,278	19,139	22,713
Switzerland	14,130	31,050	20,204
Scandinavia	28,341	29,983	28,661
Other Europe	26,513	36,086	28,786
U.S.A	26,308	60,141	40,355
Canada	29,714	28,933	29,473
Other America	29,678	42,502	34,683
Japan	21,993	17,394	21,008
India	18,941	22,756	20,277
China	19,564	28,818	22,988
Middle East	18,816	20,216	19,555
Other Asia	23,077	26,344	23,986
Australia	22,605	48,230	29,468
New Zealand	39,771	78,095	47,755
All Other Countries	49,588	10,558	36,578
Total	**19,025**	**19,794**	**19,306**

3.21.3 Daily Average Expenditure per Selected Item of Non-Package Tours

Table 3.11 shows mean daily expenditure on selected item by visitors on non-package tours. In December 2024, the highest daily average expenditure was recorded in accommodation with average expenditure of KSh 6,566 while sightseeing recorded the least expenditure of KSh 1,129. Similarly, in June 2025 the highest item of expenditure for non-package tours was accommodation with mean expenditure of KSh 4,826 while parky entry recorded the least expenditure of KSh 934.

Table 3.11: Daily Average Expenditure per Selected Item of Non-Package Tours

KSh

Expenditure Item	Dec 2024	June 2025
Accommodation	6,566	4,826
Food and Drinks	2,689	2,335
Road Transport	1,470	1,545
Recreation and Amusements	2,762	2,429
Sightseeing	1,129	1,131
Shopping not for resale	2,502	2,420
Entertainment	2,112	1,870
Park Entry	1,184	934

3.21.4 Daily Average Expenditure per Selected Item of Non-Package Tours by Country of Residence

Table 3.12 shows the daily average expenditure per selected item for non-package tours by region. In terms of daily average expenditure for non-package by item, the survey revealed that residents of West and North Africa had the highest spending at KSh 10,410 and KSh 8,627 on accommodation, respectively and the least being those from EAC region at KSh 3,881. Residents from New Zealand, Middle East and North Africa spent more on food and drinks at KSh 5,228, KSh 3,780 and KSh 3,751, respectively, while EAC was the lowest spending KSh 1,793. Overall, the findings indicate notable residency differences in spending patterns, underscoring the varying consumption behaviour and travel preferences among inbound visitors on non-package tours.

Table 3.12: Daily Average Expenditure per Selected Item of Non-Package Tours by Region

KSh

Region/ Expenditure Item	Accommodation	Food and Drinks	Road Transport	Recreation and Amusements	Sightseeing	Shopping not for resale	Entertainment	Park Entry
EAC	3,881	1,793	1,287	1,872	1,129	2,342	1,576	493
North Africa	8,627	3,751	1,387	2,126	403	1,670	1,512	551
East and Central Africa	8,492	3,241	1,594	3,416	857	5,030	4,911	1,225
West Africa	10,410	3,634	1,426	3,471	1,467	8,188	2,680	2,227
South Africa	6,094	2,041	1,401	1,379	1,410	2,254	1,293	962
Other Africa	6,128	3,291	1,951	2,872	978	3,542	3,051	588
United Kingdom/ Britain	7,511	3,372	1,666	2,182	944	1,889	1,851	1,088
Germany	6,233	3,079	1,503	3,681	2,008	1,843	1,815	589
France	7,795	2,863	1,435	2,826	884	1,761	1,117	1,262
Italy	5,331	3,071	2,480	4,121	1,048	1,399	1,063	531
Switzerland	7,779	2,594	1,232	539	1,630	764	1,199	555
Scandinavia	6,574	2,615	1,674	2,019	640	1,824	1,738	1,085
Other Europe	6,597	3,326	1,518	4,071	1,130	2,068	2,314	1,179
U.S. A	6,330	2,991	2,780	2,828	1,200	2,161	2,637	1,043
Canada	7,312	3,525	2,084	1,993	3,337	1,416	1,841	1,636
Other America	7,177	4,090	1,655	2,643	1,440	2,185	1,493	3,054
Japan	8,148	3,094	2,147	499	415	2,906	583	1,967
India	7,147	2,561	1,361	1,479	658	1,184	948	895
China	7,664	3,220	1,887	1,896	722	1,647	2,493	1,324
Middle East	8,166	3,780	1,823	2,355	1,080	3,315	3,242	539
Other Asia	8,195	2,785	1,713	2,084	808	3,419	2,732	2,370
Australia	7,567	3,042	1,168	3,413	878	2,816	3,566	1,210
New Zealand	4,473	5,228	1,013	185	940	885	170	863
All Other Countries	8,953	5,513	1,092			611		755
Total	**5,974**	**2,558**	**1,501**	**2,670**	**1,129**	**2,476**	**2,052**	**1,127**

3.21.5 Daily Average Expenditure by Main Purpose of Visit

The analysis of survey data indicates that in both December 2024 and June 2025, holiday/leisure, shopping, study/student and Meeting/Incentive/Conference/Exhibition (MICE) emerged as the leading purposes of visit with higher expenditure by inbound visitors. In December 2024, the daily average expenditure for those who came for sport event was the highest at KSh 28,701, followed by MICE and holiday/ leisure at KSh 24,883 and KSh 22,927, respectively. Those who came mainly to visit friends/relatives recorded the lowest

average expenditure at KSh 7,062. Similarly, in June 2025 the highest average daily expenditure was recorded by inbound tourist whose main purpose of visit were holiday/leisure at KSh 36.384, followed by those who came for shopping at KSh 29,266 and study/student at KSh 20,634. The lowest expenditure was recorded by those who came to visit friends/relatives at KSh 5,392 as illustrated in Table 3.13 (a). These patterns suggest a diversified set of high-value travel motivations, with leisure, sporting events and business/professional forming the core drivers of inbound tourist spending during the review period.

Table 3.13 (a): Daily Average Expenditure by Main Purpose of Visit

KSh

Purpose of Visit	Dec 2024	June 2025	Total
Meeting/Incentive/ Conference/ Exhibition (MICE)	24,883	16,919	21,772
Business/Professional	17,058	14,466	15,930
Study/Student	22,838	20,634	21,829
Holiday/Leisure	22,927	36,384	26,577
Shopping	21,047	29,266	24,263
Cultural Event	11,762	5,604	7,620
Sport Event	28,701	17,242	20,870
Second Residence	10,019	11,904	10,949
Visiting Relatives/Friends	7,062	5,392	6,381
Health/Treatment	12,029	11,051	11,583
Religion/Pilgrimage	11,448	5,891	8,952
In Transit	16,764	15,294	15,941
Total	**19,025**	**19,794**	**19,306**

3.21.6 Mean Daily Expenditure by Purpose of Visit and Selected Item

The survey shows that accommodation was the major expenditure item for most of the inbound tourist, except for those who came for sport event purposes. Average daily expenditure on accommodation accounted for KSh 8,198 followed by recreation at KSh 3,391 then food and drinks at KSh 2,790 for those who came for MICE. On average, those who came for sport event spent more on recreation and amusements at KSh. 3,079 daily followed by accommodation at KSh 2,432 daily as presented in Table 3.13 (b).

Table 3.13 (b): Daily Average Expenditure by Purpose of Visit and Selected Item

KSh

Expenditure Item/Purpose of Visit	Meeting/Incentive/ Conference/ Exhibition (MICE)	Business/ Professional	Study/Student	Holiday/Leisure	Shopping	Cultural Event	Sport Event	Second Residence	Visiting Relatives/Friends	Health/Treatment	Religion/ Pilgrimage	In Transit	Total
Accommodation	8,198	6,565	5,214	5,630	3,129	4,286	2,432	4,808	4,610	2,453	2,576	8,233	5,974
Food and Drinks	2,790	2,719	2,399	2,808	1,736	1,281	1,494	2,606	2,022	1,204	1,370	3,099	2,558
Road Transport	1,710	1,875	1,241	1,388	1,193	1,003	960	1,093	1,169	1,762	1,610	4,394	1,501
Recreation and Amusements	3,391	2,327	2,010	2,813	951	2,728	3,079	3,252	2,315	143	232		2,670
Sightseeing	1,067	1,010	754	1,250		405	103	2,224	909	88	551	2,500	1,129
Shopping not for resale	2,235	3,479	2,239	1,709	39,868	1,928	517	3,500	2,560	1,082	1,199	6,197	2,476
Entertainment	2,282	2,556	1,472	1,788	964	986	1,012	3,493	2,233		281	3,100	2,052
Park Entry	619	2,531	1,092	1,133		512		31	760		114		1,127

3.22 Accommodation Facilities

Table 3.14 present the distribution of visitors by accommodation facility, analysis of the survey data showed that hotels remained the dominant accommodation facility in both surveys, accounting for 57.0 per cent of visitors in December 2024 and 52.1 per cent in June 2025, this was followed by visitors who were accommodated by friends/relatives at 21.6 per cent in December 2024 and 25.6 per cent in June 2024. Vacation rentals such as Airbnb ranked third in accounting for 14.6 per cent and 9.6 per cent in June 2025. Lodges, apartments, campsites, villas, motels and cottages were used by relatively fewer visitors, cumulatively accounting for 30.1 per cent in December 2024 and 24.3 per cent in June 2025.

Table 3.14: Visitors Distribution by Accommodation Facility

Per cent

Accommodation Facility	Dec 2024	June 2025
Hotel	57.0	52.1
Friends/Relatives House	21.6	25.6
Vacation Rentals (Airbnb)	14.6	9.6
Lodges	10.6	9.4
Apartment	8.4	5.4
Campsite	3.9	2.9
Villa	3.1	1.1
Other	1.8	4.0
Motel	1.2	0.7
Cottage	1.2	0.8

3.23 Mode of Payments

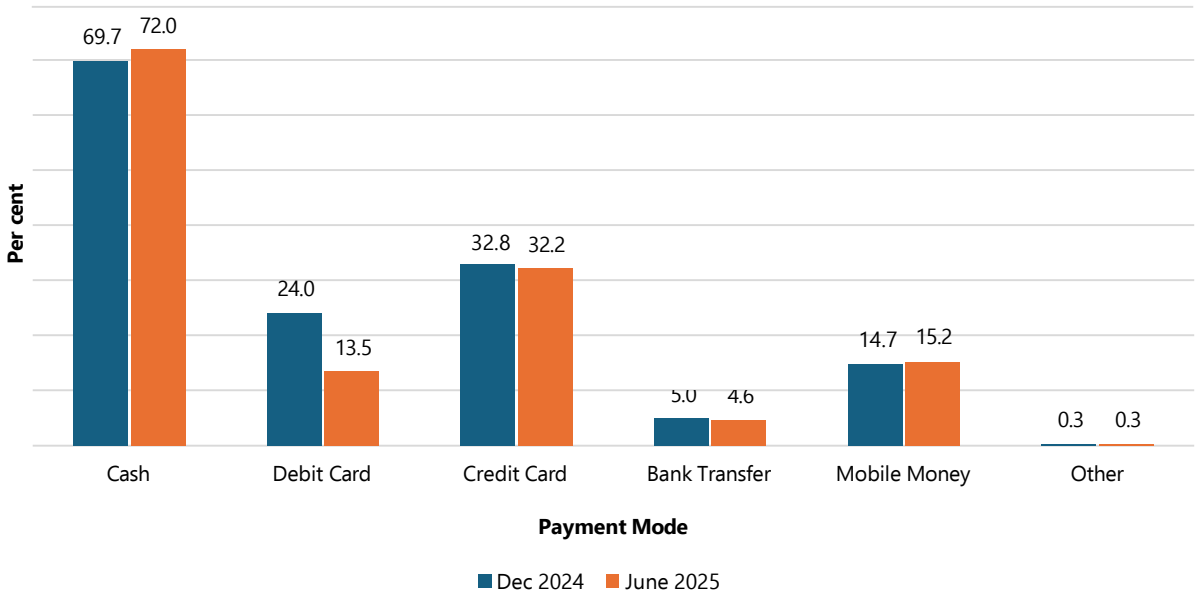
Table 3.15 illustrate visitor distribution by mode of payment. Analysis shows that cash is the most widely used method, accounting for 69.7 per cent of payments in December 2024 and 72.0 per cent in June 2025, credit card usage was at 32.8 per cent for December 2024 and while for June 2025 it was 32.2 per cent. Mobile money, an increasingly important digital option in the region, recorded moderate usage, registering 14.7 per cent in December 2024 to 15.2 per cent in June 2025 as shown in Figure 3.12.

Table 3.15: Visitors Distribution by Payment Mode

Per cent

Payment Mode	Dec 2024	June 2025
Cash	69.7	72.0
Debit Card	24.0	13.5
Credit Card	32.8	32.2
Bank Transfer	5.0	4.6
Mobile Money	14.7	15.2
Other	0.3	0.3

Figure 3.12: Visitors Distribution by Payment Mode

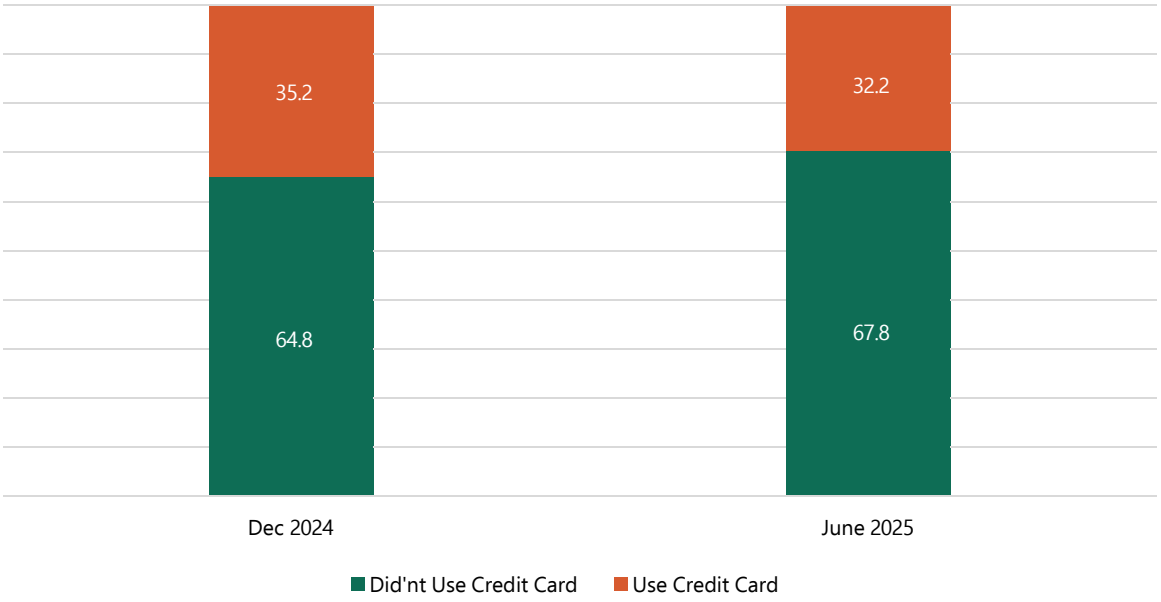


3.24 Use of Credit Card

The survey results showed a difference in the use of credit card between December 2024, and June 2025 as shown in the Figure 3.13. In December 2024, 35.2 per cent of the respondents reported that they use a credit

card while 64.8 per cent indicated that they didn't. Similarly, June 2025, had same pattern as the proportion of individuals who did not use a credit card increased to 67.8 per cent while those who used a credit card declined to 32.2 per cent.

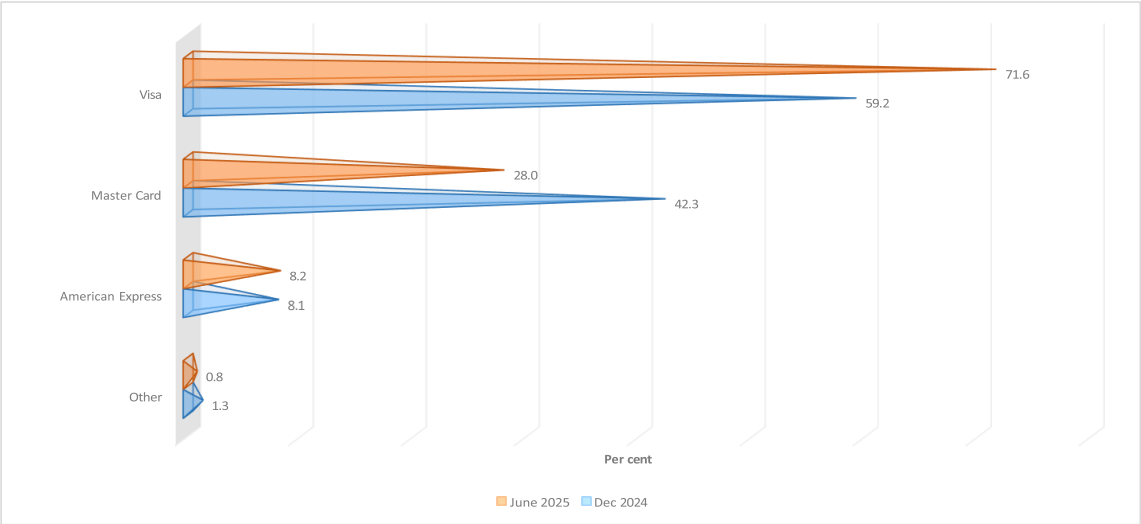
Figure 3.13: Use of Credit Card



3.25 Type of Credit Card used

Majority of tourists used Visa (71.6%) followed by Master Card (28.0%) then American Express (8.2 %) in June 2025. Similarly, in December 2024, Visa was the highest followed with Master Card, then American Express accounting for 59.2, 42.3 and 8.1 per cent, respectively, as shown in Figure 3.14.

Figure 3.14: Distribution by Type of Credit Card

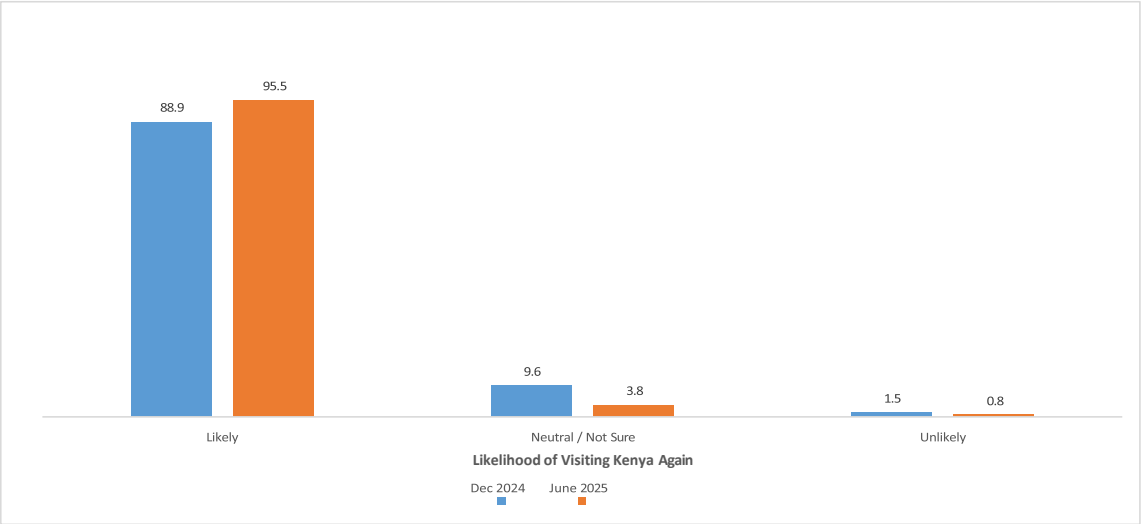


3.26 Likelihood of Visiting Kenya Again

Likelihood of visiting Kenya again is an important indicator of visitor satisfaction and destination loyalty in inbound tourism. According to the survey, most international tourists have a strong intention to return to Kenya. In December 2024, 88.9 per cent of inbound tourist reported they will likely visit Kenya again and only 1.5 per cent said unlikely to visit, the rest were not sure. Similarly, in June 2025, those who said they will visit Kenya again were 95.5 per cent and those who said they will never visit were only 0.8 per cent as shown in Figure 3.15. These findings suggest high levels of satisfaction with the Kenyan tourism experience and point to a strong potential for repeat tourism, which is crucial for sustaining and growing inbound

tourism.

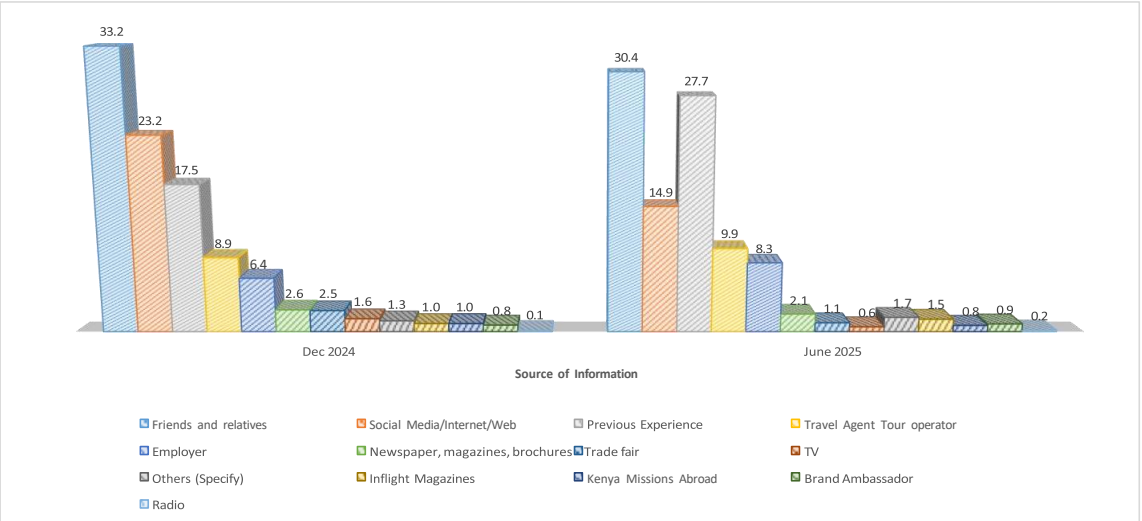
Figure 3.15: Likelihood of Visiting Kenya Again



3.27 Source of Information about visiting Kenya

The analysis of survey data showed that friends and relatives, social media and previous are the leading sources of information about visiting Kenya as shown in Figure 3.16. In December 2024, the majority of the respondents being 33.2 per cent obtained the information about visiting Kenya from friends and relatives, followed by social media/internet/web at 23.2 per cent and previous visits at 17.5 per cent. Similarly, in June 2025 friends and relatives acted as the major source of information about visiting Kenya accounting for 30.4 per cent of the respondents. Previous visits came second at 27.7 per cent and social media/ internet/ web accounted for 14.9 per cent.

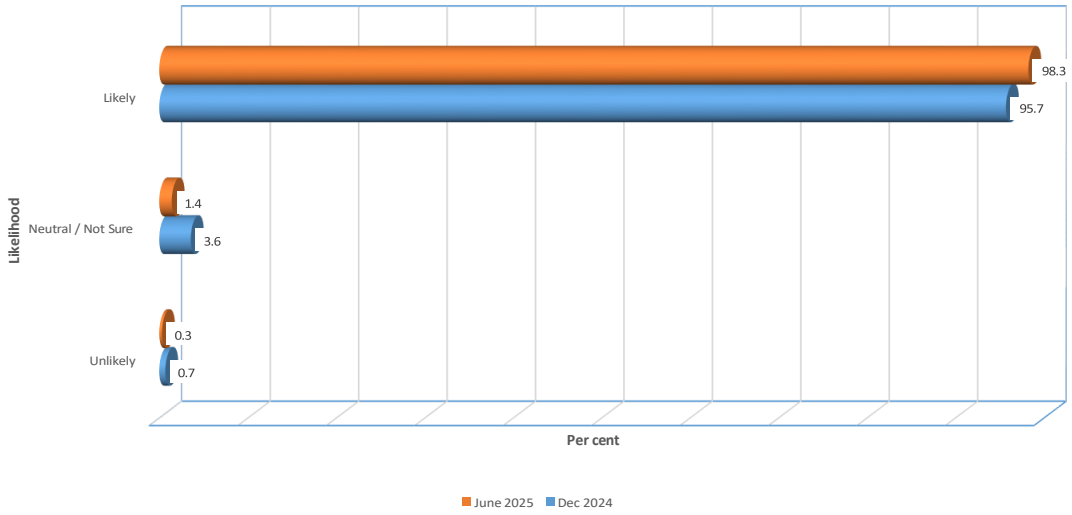
Figure 3.16: Source of Information about Visiting Kenya



3.28 Likelihood to Recommend Kenya as a travel destination

The surveys indicated that most of the visitors would recommend Kenya as a travel destination as shown in figure 3.17. This correlates with their likelihood of visiting Kenya again, illustrated above. In December 2024, 95.7 per cent of the visitors stated that they are likely to recommend Kenya as a tour destination. Similarly, majority of the visitors being 98.3 per cent in June 2025 stated that they are likely to recommend Kenya as a tour destination.

Figure 3.17: Likelihood to Recommend Kenya as a Travel Destination



3.29 E-commerce

Table 3.16 presents the use of e-commerce platforms by inbound tourists in searching, booking and payment for tourism services. The results reveal wide disparities across source regions with residents from North Africa channel about 34.6 per cent of their total spending through online platforms, followed closely by those from Japan (30.7%) and France (30.5%) as shown in Table 3.16. Other key markets, including South Africa (29.1%), Middle East (28.5%) and West Africa (27.7%). By contrast, visitors from the EAC allocated only about 7.5 per cent of their total trip expenditure to goods and services ordered online. The results indicate that, while inbound tourists from many major markets already make intensive use of e-commerce when visiting Kenya, there remains significant scope to increase the use of online booking and other digital ordering channels among EAC and other low-adoption source regions.

Table 3.16: Percentage of Online Total Expenditure by Region

Per cent

Region	Dec 2024	June 2025	Total
EAC	9.1	5.6	7.5
North Africa	43.5	17.9	34.6
East and Central Africa	20.6	22.5	21.2
West Africa	30.3	20.6	27.7
South Africa	29.5	28.3	29.1
Other Africa	35.0	19.1	30.7
United Kingdom/ Britain	22.3	18.5	21.4
Germany	19.1	28.9	20.7
France	33.4	24.9	30.5
Italy	20.9	25.5	21.5
Switzerland	19.7	15.4	18.1
Scandinavia	20.5	12.6	19.0
Other Europe	23.0	17.6	21.7
U.S.A	24.2	17.1	21.2
Canada	23.0	24.1	23.4
Other America	26.8	20.5	24.3
Japan	38.2	3.3	30.7
India	20.5	18.8	19.9
China	28.7	15.4	23.8
Middle East	31.6	25.8	28.5
Other Asia	17.2	4.8	13.8
Australia	28.4	14.0	24.5
New Zealand	29.7	-	23.5
All Other Countries	6.3	-	4.2
Total	**19.7**	**13.0**	**17.2**

CHAPTER 4: OUTBOUND TOURISM

4.1 Introduction

This chapter presents detailed findings from the outbound tourism expenditure surveys carried out in December 2024 and June 2025. It examines both demographic and trip-related characteristics of respondents, including age, occupation, education level, and sex, as well as travel modes, tour package types, purpose of travel, duration of stay, expenditure trends, and other relevant variables.

4.2 Outbound Tourism Expenditure Surveys

Outbound tourism expenditure surveys are essential in providing measures of the money spent by the residents when they travel abroad. The survey collects data though a face-to-face interview with the outbound tourist at the border crossing or airports upon their return to the country. To ensure the accuracy of the data, the data is collected on a recall basis. This is where the respondents are asked to recall their expenditure patterns while abroad as opposed to asking them on their expected expenditure when travelling abroad. This data is critical for creating Tourism Satellite Accounts and to help the government understand the patterns in international spending to inform tourism policy and development strategies.

4.3 Distribution of Respondents by Border Points

Majority of the respondents in both surveys were interviewed at the Jomo Kenyatta International Airport as shown in Table 4.1. The respondents interviewed at the JKIA accounted for 52.4 percent in December 2024 survey and 43.3 per cent in June 2025 survey. The other key border points included Busia, Namanga, Malaba, Isebania, Taveta and Lunga Lunga which cumulatively accounted for 41.9 per cent of the respondents in December 2024 and 53.1 per cent in June 2025. Moi International Airport captured 5.8 per cent of the respondents in December 2024 and 3.6 per cent in June 2025. This followed the normal visitors traffic across the eight main entry/ exit points of the country.

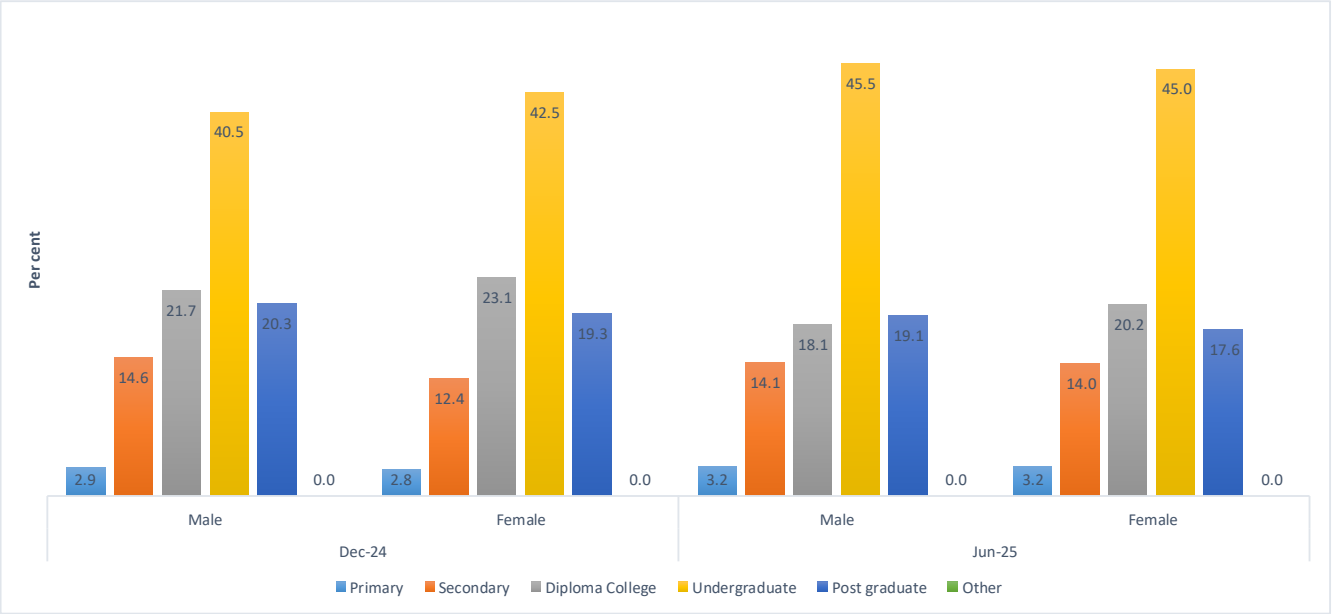
Table 4.1: Distribution of Respondents by Border Points

Border Point	Dec 2024		June 2025	
	Number	Per cent	Number	Per cent
JKIA	1,565	52.4	1,218	43.3
MIA	172	5.8	100	3.6
Busia Border	285	9.5	395	14.0
Malaba Border	172	5.8	157	5.6
Isebania Border	214	7.2	104	3.7
Lunga Lunga Border	217	7.3	116	4.1
Taveta Border	73	2.4	57	2.0
Namanga Border	291	9.7	666	23.7
Total	2,989	100.0	2,813	100.0

4.4 Level of Education by Sex

The highest level of education for the majority of outbound tourists, both male and female, was undergraduate. This was followed by diploma college then post-graduate for the high season in December 2024. Contrarily, June 2025 had a different trend in education level and between male and females. For males, the undergraduate was followed by tourist who attained post-graduate then those with diploma college. For female, the undergraduate majority were followed by those with diploma college education and then those with post-graduate education as depicted in Figure 4.1. Percentage of male who attained undergraduate education was 40.5 per cent for the December 2024 tourist and 45.5 per cent for June 2025. Female undergraduate in December 2024 were 42.5 per cent and 45.0 per cent in June 2025.

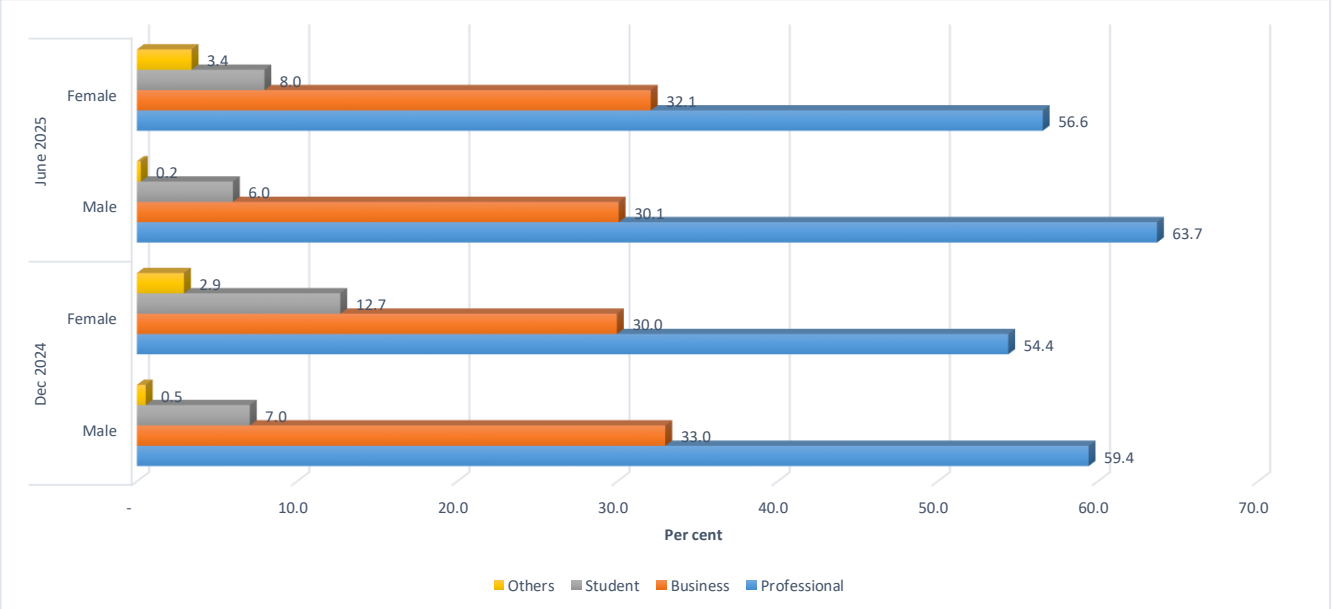
Figure 4.1: Outbound Tourists by Level of Education



4.5 Occupation by Sex

Majority of the respondents were professionals in both surveys, for both male and female as presented in Figure 4.2. This was followed by people who visited were businesspeople and students. The professionals in December 2024 were 59.4 per cent male and 54.4 per cent female. Businesspeople followed this at 33.0 male and 30.0 per cent female. Students accounted for 7.0 per cent of male respondents and 12.7 per cent of female respondents. The trend was the same in June 2025, as the professionals being the majority, followed by businesspeople then students.

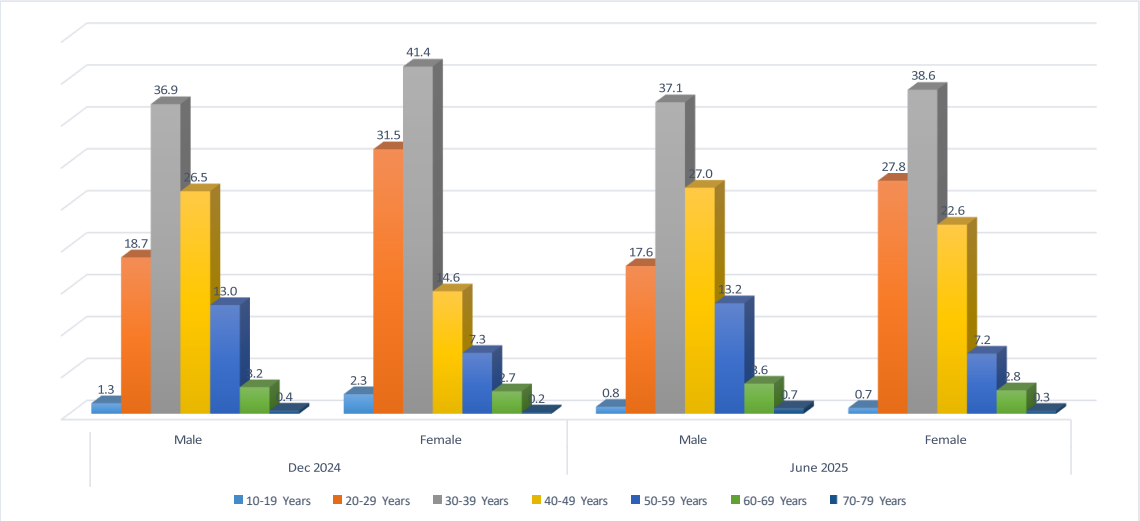
Figure 4.2: Outbound Tourists by Occupation



4.6 Age by Sex

In both surveys, the highest percentage of age group of the outbound tourists interviewed were between 30 and 39 years across both sexes. This was followed by 40 to 49 years for male and 20 to 29 years for female. The least category of tourist was those above 70 years followed by those aged 10 to 19 years as shown in Figure 4.3.

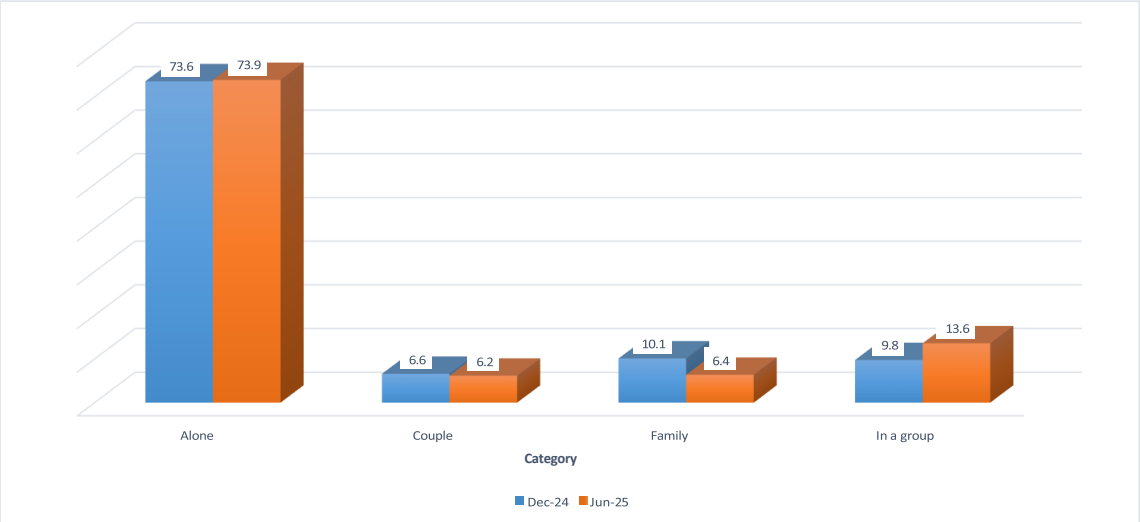
Figure 4.3: Distribution of Age by Sex



4.7 Distribution of Tourist travelling by Category

In December 2024, the majority of the respondents (73.6%) travelled alone. This was followed by those who travelled as a family (10.1%) and in a group (9.8%) as shown in Figure 4.4. The outbound tourist who travelled alone were still the majority (73.9%) in June 2025 survey, followed by those who travelled in a group (13.6%). The least category of outbound tourist is for those travelling as couples accounting for 6.6 per cent in December 2024 and 6.2 per cent in June 2025.

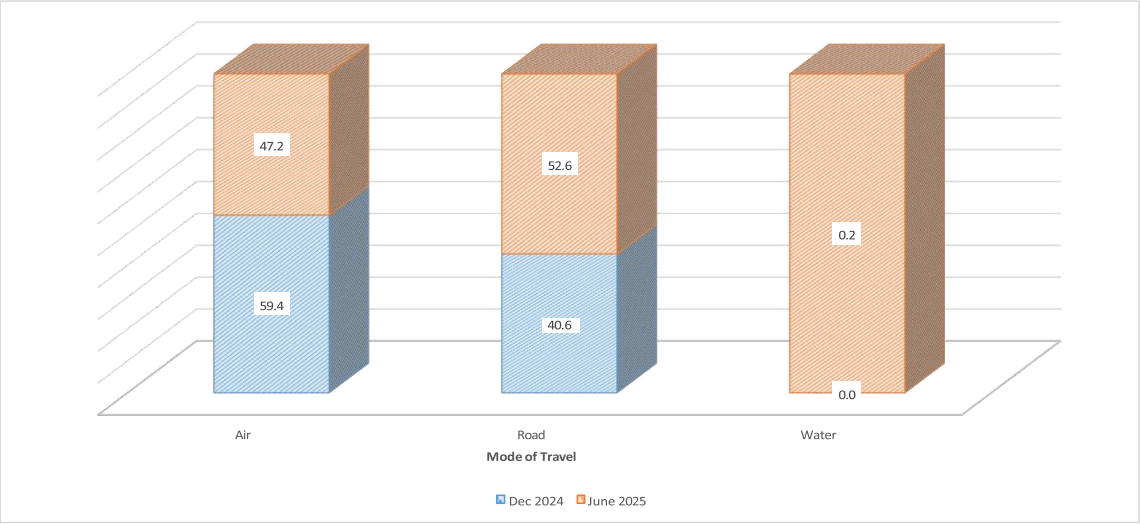
Figure 4.4: Distribution by Travelling Category



4.8 Mode of Travel

Figure 4.5 indicates that road and air were the main modes of transport for both surveys. In December 2024, survey 59.4 per cent of the outbound tourist used air as a mode of travel while 40.6 per cent used road. However, in June 2025 survey road was the main mode of travel accounting for 52.6 per cent while air was used by 47.2 per cent of the respondents.

Figure 4.5: Mode of Travel



4.9 Visited Countries

Table 4.2 shows the destinations of the outbound tourist in December 2024 and June 2025. The most visited destination is the East African countries with Tanzania accounting for the largest share of the destination, followed by Uganda in both December 2024 and June 2025 surveys. Outside Africa, United Arab Emirates and the United States of America were the most visited destinations in both surveys. In December 2024, outbound tourist (29.9%) visited Tanzania, 13.1 per cent visited Uganda and 5.7 per cent visited Rwanda. Those who visited United Arab Emirates were 11.6 per cent and the United States of America being 5.2 per cent. In June 2025, the outbound tourist who visited Tanzania accounted for 35.5 per cent of the respondents, 19.9 per cent visited Uganda and 1.1 per cent visited Rwanda. Outside Africa, 4.8 per cent visited United Arab Emirates and 6.8 per cent visited the United States of America.

Table 4.2: Visited Countries

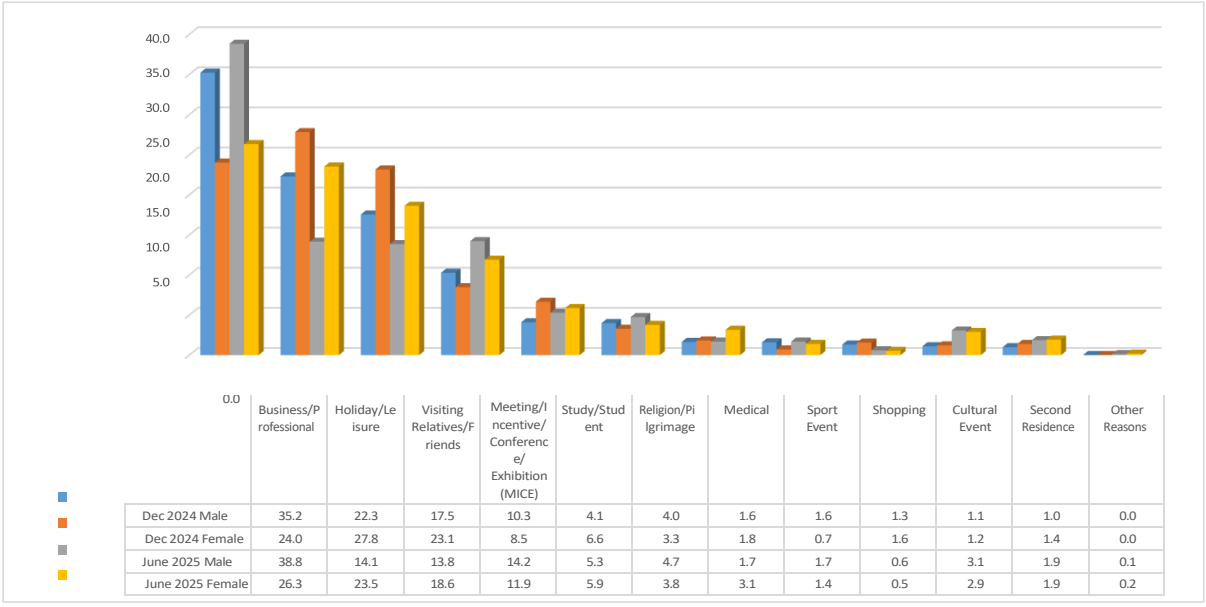
Per cent

Country of Residence	Dec 2024	June 2025
Tanzania	29.9	35.5
Uganda	13.1	19.9
United Arab Emirates	11.6	4.8
Rwanda	5.7	1.1
United States of America	5.2	6.8
Ethiopia	4.7	1.6
United Kingdom	3.1	2.3
Saudi Arabia	2.8	1.9
South Africa	2.7	3.1
Australia	1.2	0.6
Qatar	1.1	3.0
Germany	1.1	0.7
Canada	1.0	0.8
South Sudan	1.0	0.1
India	0.9	0.9
France	0.8	2.1
Democratic Rep. of Congo	0.7	0.3
Egypt	0.7	0.1
Italy	0.6	0.8
Netherlands	0.6	0.7
Burundi	0.6	0.4
Japan	0.5	0.2
Malawi	0.5	0.6
Others	9.9	11.7
Total	100.0	100.0

4.10 Main Purpose of Visit Abroad

For both surveys, business/professional was the leading purpose of visit for the outbound travelers across sex. This was followed by holiday/ leisure, visiting relatives/friends and Meeting/Incentive/Conference/Exhibition in that order. However, there were disparities between male and female as shown in Figure 4.6. Business/professional accounted for 35.2 per cent male and 24.0 per cent female in December 2024 compared to 38.8 per cent male and 26.3 per cent female in June 2025. On the other hand, more women than men travelled for the purposes of holiday and visiting friends/relatives. Overall, the purpose of travel by Kenyan outbound tourists is in tandem with the global trend.

Figure 4.6: Main Purpose of Visit

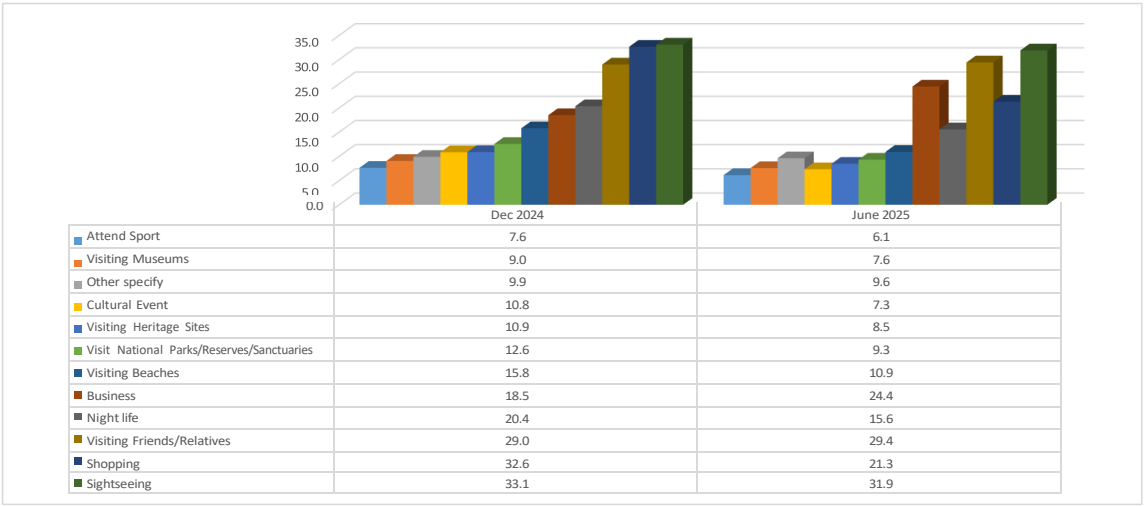


	Business/Professional	Holiday/Leisure	Visiting Relatives/Friends	Meeting/Incentive/Conference/Exhibition (MICE)	Study/Student	Religion/Pilgrimage	Medical	Sport Event	Shopping	Cultural Event	Second Residence	Other Reasons
Dec 2024 Male	35.2	22.3	17.5	10.3	4.1	4.0	1.6	1.6	1.3	1.1	1.0	0.0
Dec 2024 Female	24.0	27.8	23.1	8.5	6.6	3.3	1.8	0.7	1.6	1.2	1.4	0.0
June 2025 Male	38.8	14.1	13.8	14.2	5.3	4.7	1.7	1.7	0.6	3.1	1.9	0.1
June 2025 Female	26.3	23.5	18.6	11.9	5.9	3.8	3.1	1.4	0.5	2.9	1.9	0.2

4.11 Activities Engaged in while Outside Kenya

Other than the main purpose of visit, majority of the outbound tourists engaged in sightseeing (33.1%) followed by shopping (32.6%) then visiting friends/relatives (29.0%) in December 2024. In June 2025, majority preferred going for sightseeing (31.9%), followed by visiting friends/relatives (29.4%) and business (24.4%) as an alternative activity. The rest of other activities engaged in are as shown in Figure 4.7.

Figure 4.7: Activities Engaged in while Abroad

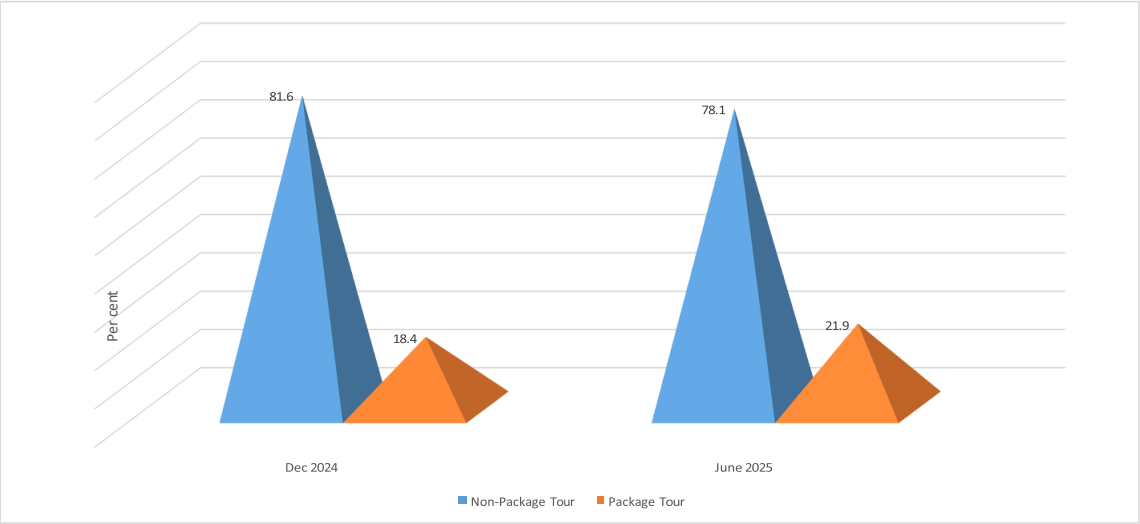


	Dec 2024	June 2025
Attend Sport	7.6	6.1
Visiting Museums	9.0	7.6
Other specify	9.9	9.6
Cultural Event	10.8	7.3
Visiting Heritage Sites	10.9	8.5
Visit National Parks/Reserves/Sanctuaries	12.6	9.3
Visiting Beaches	15.8	10.9
Business	18.5	24.4
Night life	20.4	15.6
Visiting Friends/Relatives	29.0	29.4
Shopping	32.6	21.3
Sightseeing	33.1	31.9

4.12 Type of Tour

Figure 4.8 shows the type of tour used outbound tourist who respondent in December 2024 and June 2025. The surveys noted that 81.6 per cent and 78.1 per cent outbound tourist used non-package tours in December 2024 and June 2025, respectively. June 2025 had more respondents using package tours at 21.9 per cent compared to 18.4 per cent in December 2024 representing an increase in package tours by Kenyans during low season while visiting abroad.

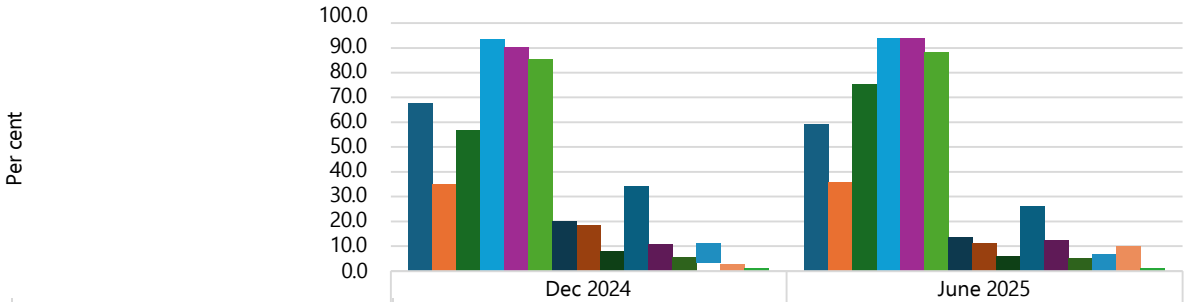
Figure 4.8: Distribution of Visitors by Type of Tour



4.13 Package Tour Inclusions

The main inclusions in package tours included accommodation, meals and drinks. In December 2024, the accommodation at 93.3 per cent, followed by and meals (90.4%) then drinks (85.1%) as shown in Figure 4.9. Similarly, meals had a significant share of the package tours in June 2025 accounting for 93.8 per cent. The share was nearly the same with accommodation at 93.7 per cent, followed by drinks at 88.3 per cent.

Figure 4.9: Package of Tour Inclusion

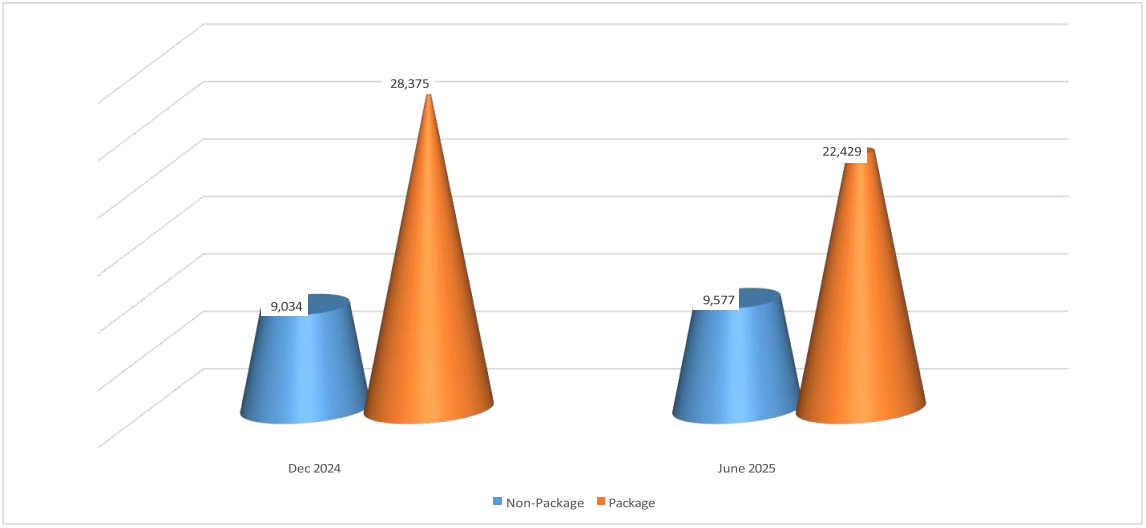


	Dec 2024	June 2025
International Return Fares	67.5	59.1
Travel Visa	34.8	35.6
Transportation in the Visited Country	56.6	75.3
Accommodation	93.3	93.7
Meals	90.4	93.8
Drinks	85.1	88.3
National Parks/ Reserves/Sanctuary	20.1	13.3
Museums/Heritage Sites	18.3	11.0
Cultural Events	8.0	5.8
Sightseeing	33.9	26.0
Event/Conference	10.7	12.2
Educational Tours	5.6	5.0
Travel insurance	8.0	6.7
Electronic Travel Authorization	2.5	9.9
Other	0.9	1.0

4.14 Tourist Expenditures

The expenditure for those on package tour for the outbound tourist was more in both surveys as shown in Figure 4.10. The mean daily expenditure for the outbound tourist on package tour type was KSh 28,375 and KSh 22,429 in December 2024 and June 2025, respectively. The daily average expenditure for the outbound tourist on non-package tour was less in December 2024 (KSh 9,034) compared to June 2025 (KSh 9,577).

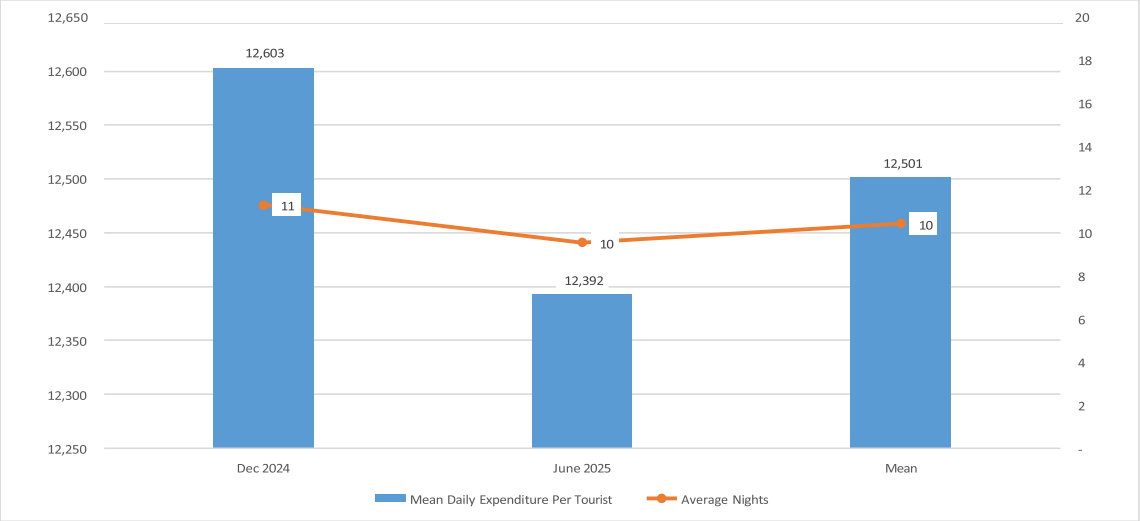
Figure 4.10: Mean Daily Expenditure by Type of Tour



4.14.1 Mean Expenditure and Nights spent

The daily average expenditure for Kenyan residents who travelled abroad was KSh 12,501 with mean nights spent being 10 nights as shown in Figure 4.11. In December 2024, the daily per capita expenditure of the outbound tourist was KSh 12,603 with the average nights of 11 nights. In June 2025, the daily per capita expenditure declined to KSh 12,392 with reduced mean night standing at 10 nights.

Figure 4.11: Mean Daily Expenditure and Average Nights



4.14.2 Mean Expenditure by Selected Item of Non-Package Tours

The detailed daily mean expenditure for the non-package tours categories including accommodation, food and drinks, transport, recreation, shopping and other selected expenses paid by the residents while abroad is shown in Table 4.3. In December 2024, outbound tourists on non-package tours spent more on accommodation, followed by shopping not for resale and food and drinks. The daily mean expenditure in such included KSh 5,641 for accommodation, KSh 2,718 on shopping for resale and KSh 2,445 on food and drinks. Similarly, in June 2025, the highest daily average expenditure was for accommodation at KSh 4,731, shopping not for resale at KSh 2,984 and food and drinks at KSh 2,335.

Table 4.3: Mean Daily Expenditure per Selected Item of Non-Package Tours

KSh

Non- Package Components	Dec 2024	June 2025
Accommodation	5,641	4,731
Food and Drinks	2,445	2,335
Road Transport	1,823	1,609
Recreation and Amusement	1,560	2,319
Sightseeing	1,354	1,406
Shopping not for resale	2,718	2,984
Entertainment	2,056	1,776
Park Entry	378	940

4.14.3 Mean Expenditure by Main Purpose of Visit

Table 4.4 shows the mean daily expenditure by main purpose of visit. According to the survey, outbound tourist who travelled abroad for MICE spent had the highest average daily expenditure at KSh 18,653, followed by those who travelled for study/student spending KSh 17,563 and those who went for sport event who spent KSh 16,116 daily. This was the trend in both surveys.

Table 4.4: Mean Daily Expenditure by Main Purpose of Visit

KSh

Purpose of Visit	Dec 2024	June 2025	Total
Meeting/Incentive/Conference /Exhibition (MICE)	22,061	16,039	**18,653**
Business/Professional	13,528	14,699	**14,122**
Study/Student	15,959	19,136	**17,563**
Holiday/Leisure	14,372	12,249	**13,504**
Shopping	4,731	8,650	**5,812**
Cultural Event	7,905	4,124	**5,214**
Sport Event	21,390	11,681	**16,116**
Second Residence	10,149	8,894	**9,384**
Visiting Relatives/Friends	5,675	6,003	**5,816**
Medical	7,575	15,218	**11,829**
Religion/Pilgrimage	5,580	5,162	**5,361**
Others		9,687	**9,687**
Total	**12,603**	**12,392**	**12,501**

4.14.4 Mean Expenditure by Main Purpose of Visit and Selected Item

The mean daily expenditure by main purpose of visit and selected item is shown in Table 4.5. The survey shows that average daily expenditure on accommodation was the highest (KSh 6,200) followed by shopping not for resale at KSh 2,984, food and drinks at KSh 2,845 and entertainment at KSh 1,729 for those who went for MICE. The least expenditure was on road transport and park entry spending KSh 1,091 and KSh 406 daily per capita, respectively, for those who visited relatives/friends.

Table 4.5: Mean Daily Expenditure by Purpose of Visit and Selected Items

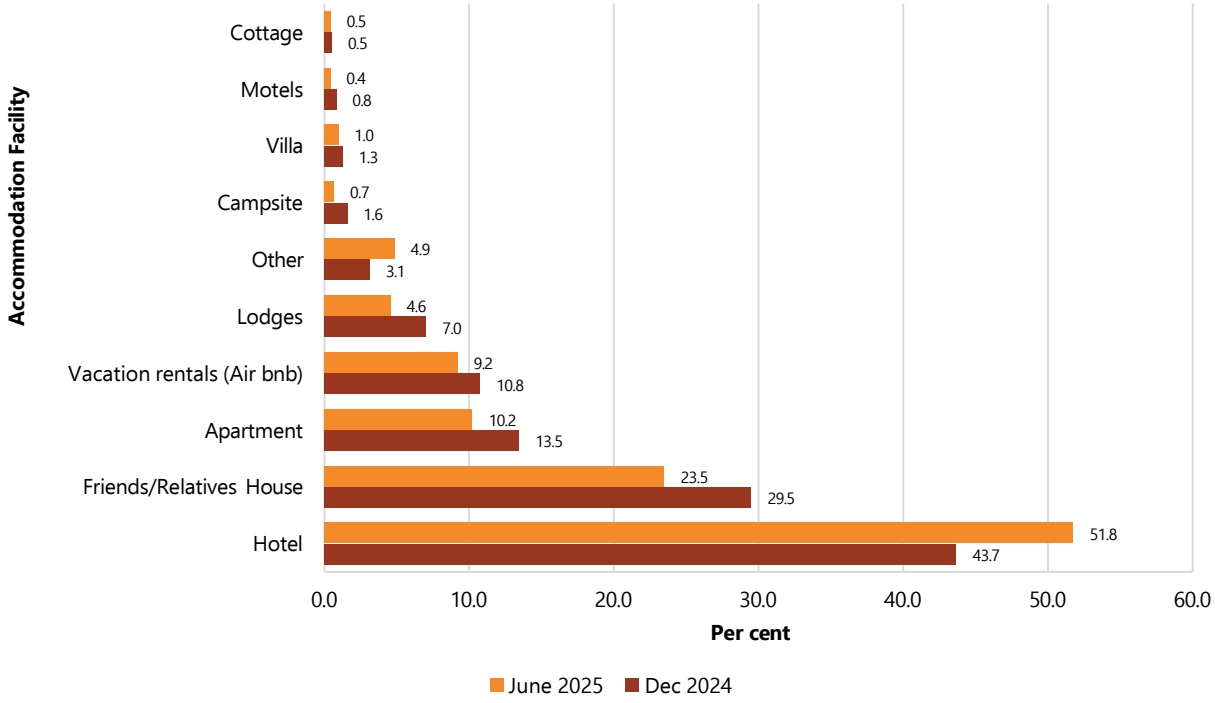
KSh

Expenditure Item /Purpose of Visit	Meeting/Incentive/ Conference / Exhibition (MICE)	Business/Professional	Study/Student	Holiday/Leisure	Shopping	Cultural Event	Sport Event	Second Residence	Visiting Relatives/Friends	Medical	Religion/Pilgrimage	Other Reasons	Total
Accommodation	6,200	5,733	5,155	5,023	1,774	4,839	5,169	4,288	4,311	2,074	2,114	5,621	5,192
Food and Drinks	2,845	2,754	2,605	2,328	1,073	1,613	2,453	2,072	2,125	991	995	3,748	2,390
Road Transport	1,614	2,493	1,465	1,693	1,045	1,269	1,361	1,674	1,091	1,321	1,009	2,231	1,709
Recreation and Amusement	1,483	2,004	627	1,835	1,386	1,147	843	727	2,860	10,000	1,480		1,919
Sightseeing	1,769	1,613	639	1,301	73	1,936	728	1,482	1,286	125	1,046		1,381
Shopping not for resale	2,984	3,331	1,312	2,922	5,969	2,216	3,975	3,089	2,412	1,677	2,283		2,827
Entertainment	1,729	2,010	1,610	2,154	1,185	1,869	922	2,494	1,790		1,344		1,947
Park Entry	319	390	164	650			707		406		194		529
Total	18,653	14,122	17,563	13,504	5,812	5,214	16,116	9,384	5,816	11,829	5,361	9,687	12,501

4.15 Accommodation Facilities

The most used type of accommodation by the outbound tourist is hotel in both surveys as shown in figure 4.12. This is followed by staying with friends/relatives, apartments and vacation rentals such as Airbnb. Use of cottages and motels are the least used type of accommodation which could be attributed to high cost of such accommodation. In December 2024, the outbound tourist who spent in hotels accounted for 43.7 per cent of the outbound tourist, followed by 29.5 per cent spending at their friends/relatives' houses, 13.5 per cent in apartments and 10.8 in vacation rentals such as Airbnb. In June 2025 survey, 51.8 per cent of the respondents spent in hotels, 23.5 per cent spent in friends/relatives' houses, 10.2 per cent spent their visitation days in apartments and 9.2 per cent spent in vacation rentals such as Airbnb. The least used type of accommodation was cottages, which accounted for 0.5 per cent for both surveys.

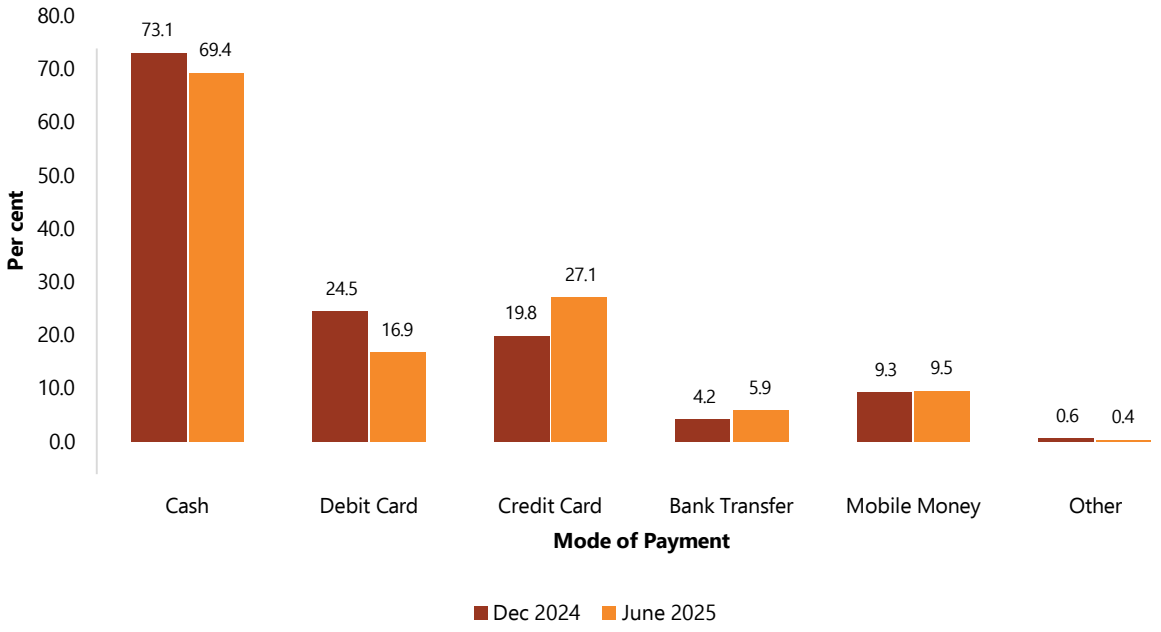
Figure 4.12: Distribution by Accommodation Facilities



4.16 Mode of Payment

The three most used mode of payment while outside the country is cash, debit and credit cards as shown in Figure 4.13. In the December 2024 survey, cash was the most used mode of payment accounting to 73.1 per cent of the respondents, followed by debit cards (24.5%) and credit card (19.8%). For June 2025 survey, cash was still the most preferred accounting for 69.4 per cent, followed by credit card at 27.1 per cent and debit card at 16.9 per cent. The survey noted that bank transfers and mobile money are not used as much for transaction for the outbound tourists.

Figure 4.13: Mode of Payment



4.17 Use of Credit Card

Figure 4.14 (a) illustrates the usage of credit card by the outbound tourists. The survey shows less usage of credit card by the respondent in both December 2024 and June 2025. In December 2024, 60.5 per cent did not use credit card. Similarly, in June 2025 it increased to 72.9 per cent of the respondents who don't use credit card.

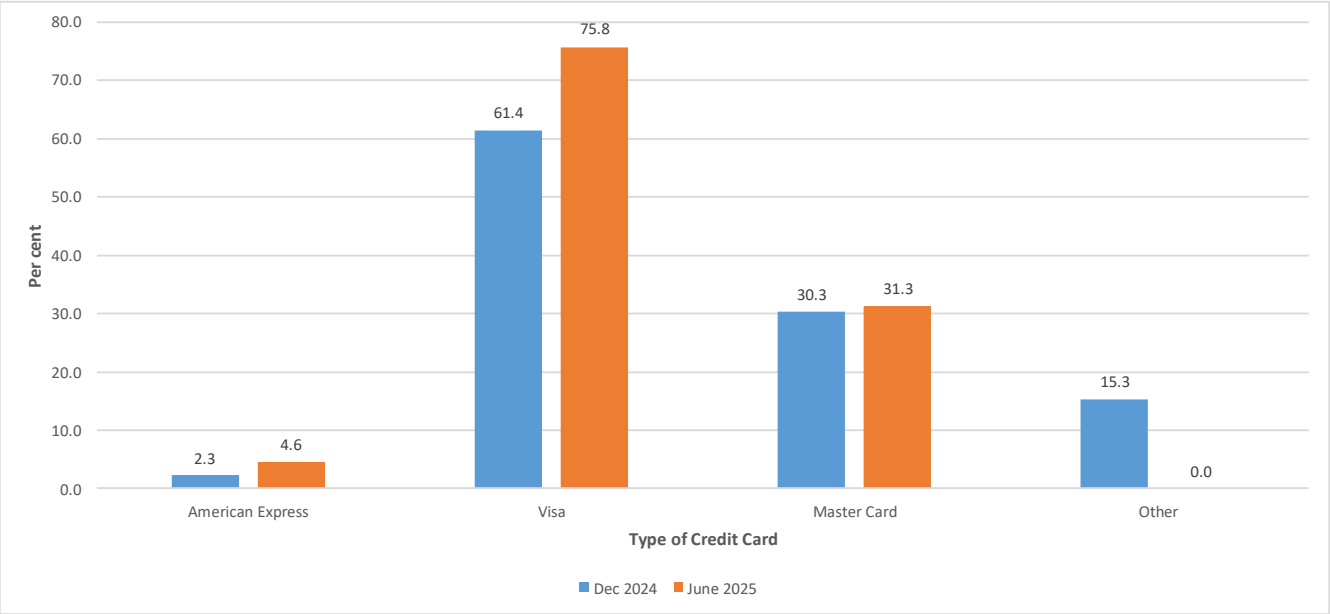
Figure 4.14 (a): Use of Credit Card



4.18 Distribution by Type of Credit Card

Figure 4.14(b) shows that visa was the most used credit card by the outbound tourists, followed by master card. In December 2024, 61.4 per cent used visa, 30.3 per cent used master card, 15.3 per cent used other credit cards and 2.3 per cent used American Express. In June 2025, outbound tourists used visa, master card and American Express at 75.8, 31.3 and 4.6 per cent, respectively.

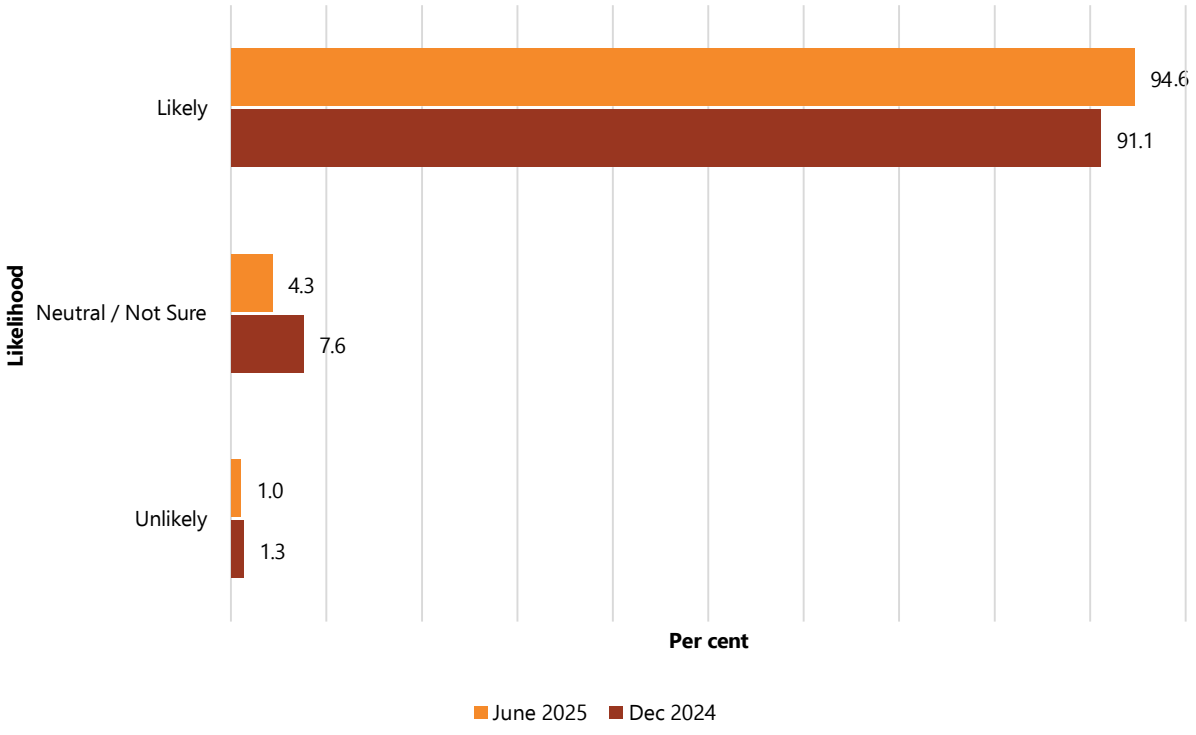
Figure 4.14 (b): Types of Credit Card Used



4.19 Likelihood of Visiting Outside Kenya Again

Measuring the likelihood of the residents visiting outside Kenya is key to policy makers as this shows the magnitude of people expected to go out and the preferred countries. Figure 4.15 shows the likelihood of Kenyans going abroad again. According to the December 2024 and June 2025 surveys, 91.1 and 94.6 per cent of the respondents are likely to go abroad again, respectively. On the contrary, 7.6 and 4.3 per cent of the respondent in the December 2024 and June 2025, respectively, were not sure to go abroad again.

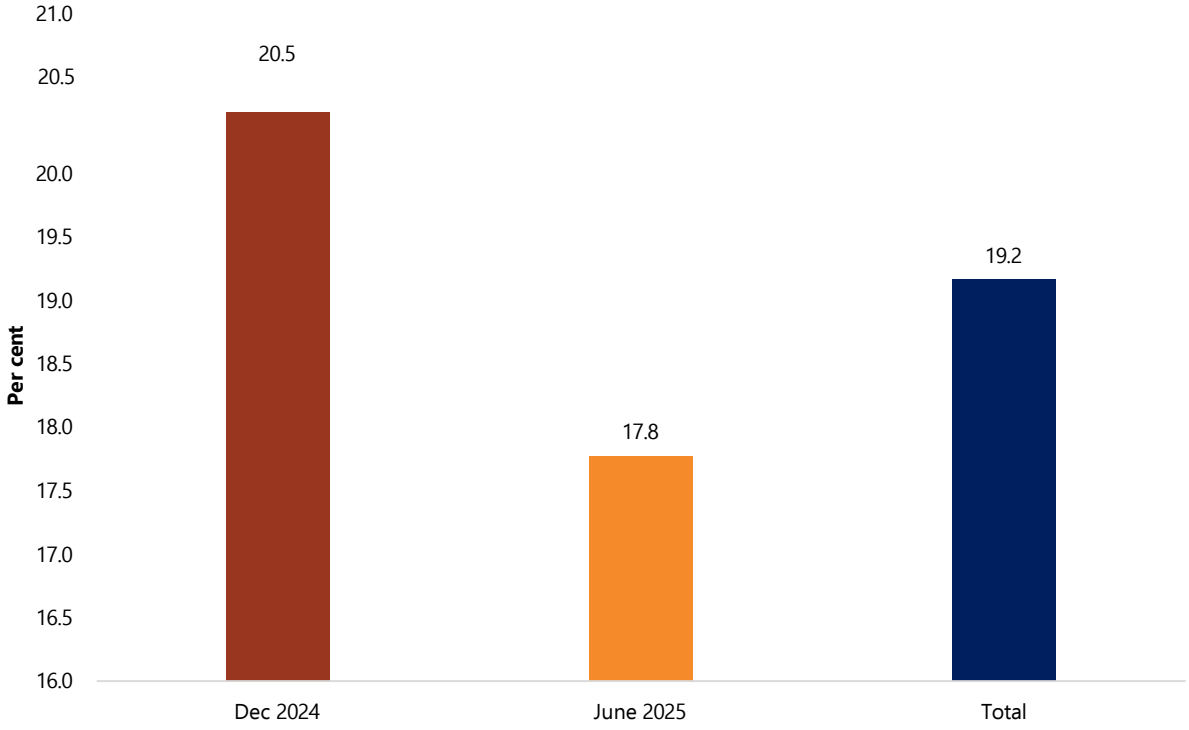
Figure 4.15: Likelihood of Visiting Abroad Again



4.20 E-commerce

For outbound tourism, the results show that 19.2 per cent of their total trip spending is ordered online, with the online share declining slightly from 20.5 per cent in December 2024 to 17.8 per cent in June 2025 as shown in Figure 4.16. This shows that outbound tourists from Kenya already make substantial use of e-commerce when arranging and purchasing tourism services.

Figure 4.16: Percentage of Online Total Expenditure



CHAPTER 5: CONCLUSION AND RECOMMENDATION

5.1 Conclusion

The 2024/2025 Inbound and Outbound Tourism Expenditure Surveys provide critical insights into the dynamics of international tourism in Kenya, marking a significant step towards establishing a robust Tourism Satellite Account. The findings confirm tourism's vital role as a source of foreign exchange and economic stimulation, while also highlighting key patterns in visitor behaviour and expenditure.

The data reveals a resilient and growing inbound sector, with a strong recovery in tourist arrivals. Key source markets include the East African Community, North America and Europe. Inbound tourists are predominantly middle-aged, highly educated professionals who primarily visit for holiday/leisure and business purposes. A significant finding is the clear distinction in expenditure patterns.

The surveys successfully identified seasonal variations, demographic profiles, preferred activities, and spending habits across different items such as accommodation, transport, shopping and food. The high likelihood of both inbound and outbound tourists to repeat their travel and recommend Kenya as a destination indicates strong satisfaction and positive destination perception.

Outbound tourism by Kenyan residents is also significant, with major destinations being Tanzania, Uganda, the United Arab Emirates and the United States of America. The primary purpose for travel is business, followed by holiday and visiting friends and relatives. Similar to inbound trends, outbound tourists on package tours spend more.

However, the reliance on cash transactions by a majority of tourists and the underutilization of digital payment platforms point to areas for financial integration improvement. The successful execution of these surveys demonstrates the feasibility and importance of sustained, high-frequency data collection to fill the historical gaps in tourism statistics, as originally identified in the 2002 TSA feasibility study.

5.2 Recommendation

To leverage on the findings of this report and enhance the contribution of tourism to Kenya’s economy, the following recommendations are proposed:

A. *For Policy and Planning*

1. Accelerate TSA Implementation: The Kenya National Bureau of Statistics, in collaboration with the key stakeholders should utilize this data to finalize and operationalize the Tourism Satellite Account. This will provide an authoritative measure of the sector's direct contribution to GDP, employment and investment.
2. Develop Targeted Tourism Policies: Formulate policies that encourage longer stays and higher expenditure, particularly by focusing on attracting and facilitating high-spending market segments (package tourists from the USA, Canada, and Australia) and promoting premium tourism products.
3. Enhance Visa and Travel Facilitation: Streamline visa processes and the Electronic Travel Authorization system based on feedback from tourist regions with high application rates, to improve the ease of travel and destination competitiveness.

B. *For Marketing and Product Development*

1. Segment-Specific Marketing Campaigns: The Kenya Tourism Board should design marketing strategies targeting high-propensity tourists (e.g., professionals aged 30-49 years and repeat visitors, emphasizing Kenya's diverse offerings beyond safari, including cultural events, beaches, and conferences.
2. Promote Package Tours: Incentivize and collaborate with tour operators to develop and market diverse, high-value package tours that integrate accommodation, transport, and unique experiences, as this segment yields significantly higher daily expenditure.
3. Diversify Tourism Products: Invest in and market emerging areas such as cultural tourism, coastal and beach tourism, and sport tourism, which show growing interest and can help mitigate seasonality.

C. *For Infrastructure and Service Improvement*

1. Improve Digital and Financial Infrastructure**:** Partner with financial institutions to promote the adoption and accessibility of digital payment systems (credit/debit cards, mobile money) for tourists to improve transaction efficiency, security, and data capture.
2. Upgrade Tourism Facilities: Focus on improving the quality and variety of accommodation (especially mid-range hotels and vacation rentals) and transport linkages from key entry points like JKIA and MIA to major tourist circuits.

D. *For Data and Research*

1. Institutionalize Regular Surveys: Secure funding to conduct inbound, outbound, and crucially, domestic tourism expenditure surveys quarterly or bi-annually to ensure a continuous flow of data for timely policy and business decisions.
2. Deepen Data Analysis: Conduct further analysis on the "why" behind expenditure patterns, tourist satisfaction drivers, and the economic impact of specific events or initiatives to inform more nuanced strategies.
3. Strengthen Inter-Agency Collaboration: Formalize the data-sharing framework between KNBS, CBK, DIS, KTB and the MoTW to create a unified and real-time tourism statistics system.

By adopting these recommendations, Kenya will be better positioned to transform its tourism sector from a significant economic activity into a precisely measured, strategically managed pillar of national development, fully aligned with the goals of the Tourism Satellite Account.

ANNEXES

Annex 1: Glossary

Inbound Tourism	Tourism of non-resident visitors within the economic territory of the country of residence
Mean Expenditure	This is the average expenditure by tourists on all expenditures within the country of destination. It includes airfare or bus fares for travel between country of residence and the destination country
Mean Nights	This is the average number of nights spent by a tourist in accommodation facilities of a resident country in a period of less than one year.
Outbound tourism	Tourism of resident visitors outside the economic territory of the country of residence
Package tour	Is a tour arranged by travel agent/or a tour operator whereby transportation, food and lodgings, sightseeing etc. are all provided at an inclusive price
Restaurant	Premises on which the business of supplying food or drinks in exchange of money is carried
Tourism	Tourism includes all trips away from one's usual environment, not just holiday/leisure trips. It also includes business, visiting friends and/relatives, medical trips, and religious journeys amongst others.
Tourist	This is a visitor who stays at least one night in collective or private accommodation in the place visited
Visitor	Someone who does not stay permanently with and is not a member of the household. Such a person can only be included as part of the household if he/she has spent at least four nights a week on average within the household during the last four weeks prior to the survey interview.
Usual environment	The geographical location or area which a person conducts their regular life activities

Annex 2: Outbound Questionnaire

Serial no.....

FORM A

CONFIDENTIAL

KNBS
KENYA NATIONAL BUREAU OF STATISTICS
Keeping you informed

OUTBOUND TOURISM SURVEY

Interview ID	_____		
Name of Research Assistant	_____	**Name of Supervisor**	_____
Name of Border Point	_____	**GPS Latitude of the Border Point**	_____
		GPS Longitude of the Border Point	_____
Date of interview	_____		

(Please circle the relevant answer(s))

Q1	Q1a	Q3
What is your Country of residence? _____ IF "**Kenya**" → **go to Q1a** IF "**Others**"→ **END Interview**	**Are you a student or on a medical trip?** 1 = Yes 0 = No **Q2** **Nationality of respondent** _____	**Date of departure** _____

Q4	Q5	Q6	Q7
Highest educational level 1 = Primary 2 = Secondary 3 = Diploma College 4 = Undergraduate 5 = Postgraduate 96 = Other (Specify)	**Occupation of respondent** 1 = Professional 2 = Business 3 = Student 96 = Other (Specify)	**Age of respondent** [ ]	**Sex of respondent** 1 = Male 2 = Female

Q8	Q9a	Q10	Q11
Number of persons travelling with you (include self) 1 = Alone 2 = Couple/Spouse 3 = Family → (give number) 4 = In a group → (give number) [ ]	**Border Point of exit out of Kenya** _____ **Q9b** **Mode of travel out of Kenya** 1 = Air 2 = Road 3 = Sea 4 = Rail	**Countries visited** 1._____ 2._____ 3._____ 4._____	**Number of nights spent in each of the countries in Q10** 1._____ 2._____ 3._____ 4._____

Q12	Q13	Q14	Q15
Main purpose of visit? 1 = Meeting/Incentive/ Conference/ Exhibition (MICE) 2 = Business/Professional 3 = Study/Student 4 = Holiday/Leisure 5 = Shopping 6 = Cultural Event 7 = Sport Event 8 = Second Residence 9 = Visiting Relatives/Friends 10 = Medical 11 = Religion/Pilgrimage 96 = Other (Specify)	**What other activities did you engage in while abroad?** *(multiple responses possible)* 1 = Business 2 = Visiting Friends/Relatives 3 = Cultural Event 4 = Attend Sport 5 = Sightseeing 6 = Visit National Parks/ Reserves/Sanctuaries 7 = Visiting Museums 8 = Visiting Heritage Sites 9 = Visiting Beaches 10 = Night life 11 = Shopping 96 = Other (Specify)	**Now going forward, I want to ask Information concerning expenditure incurred whether is for;** 1 = Respondent alone 2 = Couple 3 = Family 4 = Group *(If for family or group, indicate group size)* [ ]	**Are you travelling on a package tour?** *(This applies to individuals, couple, family and group)* 1 = Yes → **go to Q16a** 2 = No → **go to Q18a**

16a	Q17	Q18a
Amount paid for the package tour Currency | Amount | | **Q16b** **Additional Expenditure** Currency | Amount | |	**Did the package tour include the following?** *(circle all applicable answers)* 1 = International Return Fares 2 = Transportation in Kenya 3 = Transportation in the Visited Country(s) 4 = Accommodation 5 = Meals 6 = Drinks 7 = National Parks/ Reserves/ Sanctuaries 8 = Museums/Heritage Sites 9 = Cultural Events 10 = Sightseeing 11 = Event/Conference 12 = Educational Tours 13 = Electronic Travel Authorization (ETA) 14 = Travel Insurance 96 = Other (Specify)	**Please give details of your total expenditure in the visited country(s)** *(This applies only to tourist on non-package tour i.e. if Q15 = No)* *Currency | Amount* 1. Accommodation_____ 2. Food and Drinks_____ 3. Road Transport_____ 4. Air Transport_____ 5. Rail Transport_____ 6. Water Transport_____ 7. Recreation and Amusements_____ 8. Handicrafts_____ 9. Sightseeing_____ 10. Medical_____ 11. Visa fee _____ 12. Shopping not for resale (gifts, souvenir) _____ 13. Shopping for resale _____ 14. Entertainment _____ 15. Education expenses _____ 16 = Travel Insurance_____ 17 = Park Entry_____ 96 = Other (Specify) _____ **Q18b** **What percentage of your total expenditure was done through online platforms? (Estimate): _____%**

Q19	Q20a	Q20b	Q21a	Q21b
Type of accommodation facility. 1 = Hotel 2 = Lodge 3 = Motel 4 = Villa 5 = Cottage 6 = Campsite 7 = Apartment 8 = Vacation Rentals (Airbnb) 9 = Friends/Relatives House 96 = Other (Specify)	**What Mode of payments did you use to settle your expenses?** Mode of Payment | Percentage share (%) 1= Cash | 2= Debit card | 3=Credit Card | 4= Mobile money | 96 = Other (Specify) | **Total** | **100** If Q20a is 3 go to Q20b	**Which credit card(s) did you use?** 1 = American Express 2 = Visa 3 = Master Card 96 = Other (Specify)	**How likely are you to visit outside Kenya again?** 3 = Likely 2 = Neutral / Not Sure 1 = Unlikely	**What is your reason for your choice in Q21a?** _____ _____

Annex 3: Inbound Questionnaire

Serial no……

FORM B **CONFIDENTIAL**



KNBS
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Keeping you informed

INBOUND TOURISM SURVEY

Interview ID	: _____		
Name of Research Assistant	: _____	**Name of Supervisor:** _____	
Name of Border Point	: _____	**GPS Latitude of the Border Point:** _____	
		GPS Longitude of the Border Point : _____	
Date of interview	: _____		

(Please tick appropriately)

Q1	Q2a	Q3	Q4
What is your Country of residence? _____ IF "**Kenya**" → **END Interview** IF "**Others**"→ **go to Q1a** **Q1a** **Are you a student or on a medical trip?** 1 = Yes 0 = No	**Nationality of respondent?** _____ **Q2b** **Date of arrival** _____	**With whom did you travel with?** (include self) 1 = Alone 2 = Couple/Spouse 3 = Family → **(**give number) 4 = In a group → **(**give number) [ ]	**Was this your first visit to Kenya?** 1 = Yes 2 = No 3 = Born in Kenya (If **No**, indicate the number of previous visits) [ ]

Q5	Q6	Q7	Q8
Highest educational level of respondent 1 = Primary 2 = Secondary 3 = Diploma College 4 = Undergraduate 5 = Postgraduate 96 = Other (Specify)	**Occupation of respondent** 1 = Professional 2 = Business 3 = Student 96 = Other (Specify)	**Age of respondent** [ ]	**Sex of respondent** 1 = Male 2 = Female

Q9a	Q10	Q11	Q12	Q13a
Border Point of entry to Kenya _____ **Q9b** **Mode of travel to Kenya** 1= Air → **go to Q9c** 2 = Road 3 = Sea → **go to Q10** 4 = Rail **Q9c** **Type of Flight** 1 = Charter 2 = Scheduled **Q9d** **Name of Airline(s)** 1._____ 2._____ 3._____ 4._____	**Number of nights spent in Kenya** 1 = None *(on transit to/from other countries)* 2 = None *(just visiting your country for 1 day)* 3 = One or more nights *(state number of nights in the box below)* [ ]	**Main purpose for your visit to Kenya** *(circle one)* 1 = Meeting/Incentive/ Conference/ Exhibition (MICE) 2 = Business/Professional 3 = Study/Student 4 = Holiday/Leisure 5 = Shopping 6 = Cultural Event 7 = Sport Event 8 = Second Residence 9 = Visiting Relatives/Friends 10 = Medical 11 = Religion/Pilgrimage 96 = Other (Specify)	**What other activities did you take part in while in Kenya?** *(multiple responses possible)* 1 = Business 2 = Visiting Friends/Relatives 3 = Cultural Event 4 = Attend Sport 5 = Sightseeing 6 = Visit National Parks/ Reserves/Sanctuaries 7 = Visiting Museums 8 = Visiting Heritage Sites 9= Visiting Beaches 10 = Night life 11 = Shopping 96 = Other (Specify)	**Now going forward, I want to ask Information concerning expenditure incurred whether is for;** 1 = Respondent alone 2 = Couple 3 = Family 4 = Group **Q13b** *(If for family or group, indicate group size)* [ ]

Q14	Q15a	Q16	Q17a
Are you travelling on a package tour? *(This applies to individuals, couple, family and group)* 1 = Yes → **go to Q15a** 2 = No → **go to Q17a**	**Amount paid for the package tour** Currency | Amount **Q15b** **Number of nights spent in Kenya on the package tour** **Q15c** **Additional Expenditure** Currency | Amount	**Did the package tour include the following?** *(circle all applicable answers)* 1 = International Return Fares 2 =Electronic Travel Authorization (ETA) 3 = Transportation in Kenya 4 = Accommodation 5 = Meals 6 = Drinks 7 = National Parks/ Reserves/ Sanctuaries 8 = Museums/Heritage Sites 9 = Cultural Events 10 = Sightseeing 11 = Event/Conference 12 = Educational Tours 96 = Other (Specify)	**Please give details of your total expenditure Kenya** *(This applies only to tourist on non-package tour i.e. if Q14 = No)* *Currency | Amoun* 1. Accommodation_____ 2. Food and Drinks_____ 3. Road Transport_____ 4. Air Transport_____ 5. Rail Transport_____ 6. Water Transport_____ 7. Recreation and Amusements_____ 8. Handicrafts_____ 9. Sightseeing_____ 10. Medical_____ 11. Visa fee _____ 12. Shopping not for resale (gifts, souvenir) _____ 13. Shopping for resale _____ 14. Entertainment _____ 15. Education expenses_____ 16. Electronic Travel Authorization (ETA)____ 17. Park Entry_____ 96 = Other (Specify) _____ **Q17b** **What percentage of your total expenditure w done through online platforms? (Estimate): _____%**

Q18	Q19a	Q20a	Q20b	Q21
Type of accommodation facility 1 = Hotel 2 = Lodge 3 = Motel 4 = Villa 5 = Cottage 6 = Campsite 7 = Apartment 8 = Vacation Rentals (Airbnb) 9 = Friends/Relatives House 96 = Other (Specify)	**What Mode of payments did you use to settle your expenses?** Mode of Payment | Percentage share (%) 1= Cash 2= Debit card 3= Credit Card 4= Mobile money 96 = Other (Specify) **Total** | **100** If Q19a is 3 go to Q19b **Q19b** **Which credit card(s) did you use?** 1 = American Express 2 = Visa 3 = Master Card 96 = Other (Specify)	**What was the source of Information about visiting Kenya?** 1 = Travel Agent Tour operator 2 = Inflight Magazines 3 =Friends and relatives 4 = Kenya Missions Abroad 5 = Trade fair 6 = Radio 7 = Newspaper, magazines, brochures 8 = Social Media/Internet/Web 9 = TV 10 = Employer 11= Brand Ambassador 12 = Previous Experience 96 = Other (Specify)	**How likely are you to recommend Kenya as a travel destination?** 3 = Likely 2 = Neutral / Not Sure 1 = Unlikely **Q20c** **How likely are you to visit Kenya again?** 3 = Likely 2 = Neutral / Not Sure 1 = Unlikely	**What is your reas for your choice in Q20c?**