



## Survey of Villas, Cottages, Campsites and Apartments 2010



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## ACKNOWLEDGEMENT

This report presents findings of the 2010 Kenya Survey of Villas, Cottages, Campsites and Apartments, the first to be conducted by the Kenya National Bureau of Statistics (KNBS). Traditionally, data on performance of the tourism sector in the country has been sourced mainly from hotels and restaurants as well as from visitor arrivals and departures. The survey findings will particularly inform an integral part of the hitherto scarcely covered though important segment of the sector.

Conducting the survey and the report preparation was an effort of experienced teams, which participated in the rigorous and at times demanding phases of the survey. I would like to thank all those who were interviewed for co-operating with the survey teams and volunteering valuable information. Without their help, this inaugural survey could not have been accomplished.

I acknowledge the contribution of the entire KNBS team, who worked diligently from the initial stages to the finalization of this survey. I especially thank Mr. Zachary Mwangi, Director of Macro Economics Statistics Directorate for his efficient coordination, constant encouragement and supportive ideas. Also, Collins Omondi, Patrick Mwaniki, Benjamin Muchiri, Johnstone Wanjala Poipoi, Stephen Macharia, John Mburu, Mutua Kakinyi and Paul Waweru for their technical support, advice, and hard work in many aspects of organising and conducting the field work and report writing. Additionally, I would like to extend my gratitude to the personnel from the Ministry of Tourism whose combined effort with KNBS ensured completion of this survey. The tolerant effort of the research assistants and drivers who traversed long distances in remote areas to locate the target respondents is greatly appreciated.

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## EXECUTIVE SUMMARY

The 2010 Survey of Villas, Cottages, Apartments and Campsites covered major urban centres, along the coastal strip and in selected key game parks and reserves in Kenya. Twelve teams comprising three research assistants, one driver and one supervisor were constituted and assigned to different parts of the country, such that they covered all the areas of interest. A team of three regional coordinators was formed and mandated to ensure all the areas are covered.

The study was a collaboration of key Government players in the tourism industry. These included the KNBS, Ministry of Tourism (MoT) and Kenya Tourism Board (KTB).

The study revealed that Villas take 68.8 per cent of the total accommodation facilities, with majority concentrated in Malindi, while Apartments are the least with 7.4 per cent. The analysis reveals 45.5 per cent of Kenyans prefer Cottages as an accommodation facility. Campsites and Villas are preferred by 27.4 per cent and 17.4 per cent, respectively. The share of bed-nights by residents in Villas was highest with Italians, accounting for 36.2 per cent of the total villa nights while the Chinese had the least bed nights.

The total bed capacity stood at 2,406,187, with Campsites taking the biggest share at 33.4 per cent closely followed by Villas at 30.9 per cent. The total recorded stay units capacity was 1,175,406 with the main contributors being in Malindi, Central Province, Embu, Meru, Laikipia and Kajiado accounting for 50 per cent of the total stay units.

During the second quarter, Villas were the most expensive around Mt. Kenya, Lamu and Kilifi which averaged KSh 44,800; KSh 25,622 and KSh 15,500 in 2010. Cottages in Mombasa were rated highest at KSh 40,333, the same as the first quarter rate. Campsites sold the highest around Mt. Kenya area at an average of KSh 29,564 while Apartments were rated highest in Kericho and Nyanza Province zones at KSh 48,857.

In 2009, the average monthly revenue collection by Cottages was KSh 1.84 million and was the highest among all the facilities. The average monthly revenue collection for Campsites, Apartments and Villas was KSh 1.82 million; KSh 0.60 million and KSh 0.21 million, respectively. The survey results show that the facilities employed a total of 10,907 persons, and for every four employees, three were Kenyan male citizens.

## CHAPTER ONE: INTRODUCTION

### 1.1 Historical background

The earliest form of leisure tourism can be traced as far back as the Babylonian and Egyptian empires. The Greek civilization was characterized by people travelling to sacred sites for healing and sports, features that were also common with the African culture. Second homes, which are a form of tourism, were built by the rich, occupied primarily during springtime social season. Adventurers sought fame and fortune through travel. From the early seventeenth century, a new form of tourism was developed as a direct outcome of the Renaissance. Thereafter, spas grew in popularity in the seventeenth century as awareness about the therapeutic qualities of mineral water increased. Over time, taking cure in spas rapidly acquired the nature of a status symbol. Equally, sea water became associated with health benefits. By the early eighteenth century, small fishing resorts sprung up for visitors who drank and immersed themselves in sea water. From these, seaside resorts grew gradually to become social meeting points. Globally, travel and tourism only attained similar status during the modern times.

### 1.2 Tourism in Kenya

Tourism activities in Kenya date back to pre-independence when as early as the 1930s, overseas visitors and explorers started coming to Kenya mainly for big-game hunting expeditions while others came in search of solitude. These expeditions were locally referred as “Safari”, a Swahili word implying travel.

The Tourism industry has come to be acknowledged as a major contributor to the development process of the Kenyan Economy. The industry is the second largest source of foreign exchange revenue after agriculture. The main tourist attractions are game safaris through the national parks and game reserves. Other attractions include the coastal beach, museums, historical sites, snake parks and monuments. Over time, other forms of tourism have also come up in the country. These include sports, medical, educational, site seeing, etc.

The growth in the volume of tourists in the country has been accompanied by a proportionate increase in the number of tourism facilities. These include hotels that offer comfortable and luxurious accommodation to even the most discerning traveler. Hotels in Kenya are categorized from three to five stars, *mainly referred as high-class hotels*. Hotels rated two stars and below comprise what is referred as the *Budget Hotels* to suit all types of travelers. These hotels are located in popular tourist destinations such as the coastline, parks/reserves and major towns.

Over the years, the numbers of inbound visitors and domestic tourists have continued to surge upwards, causing a strain on the available facilities. Consequently, the number of accommodation facilities has also been increasing. With the increase in package tours and

other incentives, tourists have tended to stay longer than in the past. This has resulted in growth in demand for hotel accommodation and other facilities in a move to satisfy the increased tourist volumes. However, the capacity of the ordinary accommodation facilities has not been able to meet the ever increasing demand. This has given birth to alternative accommodation facilities namely Villas, Cottages, Campsites and Apartments. These are mainly utilized by long staying inbound tourists as well as the domestic ones with families. Some of the major incentives for this type of accommodation are associated competitive prices and suitability for family set-up. Unfortunately, statistics on the number of these facilities, their capacities and occupancy status however remained scanty, until this survey was undertaken.

A look at the increase in total length of stay shows that the total number of days stayed has more than doubled from 8.1 million in 2001 to 17.8 million in 2010. On the other hand, hotel bed-nights point to movement in a similar direction to that of total length, albeit at low magnitudes. During the comparison period, hotel-bed nights show an increase from 3.3 million in 2001 to 6.7 million in 2010, which was more than double. This study therefore tried to come up with data to explain the proportion that goes to Villas, Cottages, Apartments and Campsites. Thereafter this study also helps to single out the population that goes to spends with friends and relatives before making arrangements to carry out a domestic/home tourism.

As stipulated in the country's blueprint, *The Kenya Vision 2030* and the *Medium Term Plan*, the Government recognizes the important role played by the tourism sector in economic development. As illustrated in the *Economic Pillar* there are various flagship projects spread all over the country within the implementation period. This underscores the importance of comprehensive tourism related data to guide the implementation process and evaluate achievements. The survey of Villas, Cottages, Campsites and Apartments therefore sought to capture the missing data on these facilities. In addition, the survey was a step towards the realization of a Tourism Satellite Account (TSA), a component that has hitherto never been done so far.

### **1.3 Survey objectives**

The main objective of the study was to generate data relating to occupancy in Cottages, Villas, Campsites and Apartments, by country of residence. Specifically, the study sought data on the following:-

- The available capacity in these accommodation;
- The type of seasonality in occupancy;
- The turnovers in Villas, Cottages, Campsites and Apartments;
- The nature of employment (permanent/temporal); and
- The nationality of guests to these facilities.

#### **1.4 Survey organization**

The study covered all the establishments falling under the category of Cottages, Villas, Campsites and Apartments. In order to comprehensively understand and identify the facilities, the study was a collaboration involving key Government players. These were KNBS, MoT and KTB. In order to cover the entire country within minimum time, thirty six research assistants and twelve supervisors were trained on the survey techniques. These were later grouped into twelve teams comprising three Research Assistants (RAs), one driver and one Supervisor. The twelve teams were thereafter assigned different parts of the country such that they covered all the areas of interest. A team of three regional coordinators was formed and mandated to ensure all the areas are covered.

In the field, the teams worked closely with the Regional Tourist Officers (under the MoT) and the District Statistical Officers (under KNBS) who ensured facilities of interest were covered. These officers also assisted in identifying the establishments of interest.

#### **1.5 Survey methodology**

This study involved a complete coverage of all the facilities. It therefore required travelling to areas where the facilities are located and conducting interviews. The facilities were mainly in major urban centres, along the coastal strip and in selected key game parks and reserves. Some major urban centres were covered depending on their known proximity to these tourism attraction sites and/or presence of the facilities under study.

The approach for game parks and reserves was slightly different from the coastal zone and towns. This was because the physical locations of the establishments were already known by the management of the respective park/reserve. As such, the Kenya Wildlife Service (KWS) or relevant local authorities were approached to provide a waiver to gate charges as well as assisting with information on best route to the facility.

#### **1.6 Survey duration**

The physical locations of the facilities were far apart and required information was not readily available as records were either unavailable or took time to be availed. These made the survey take one month (30 days) in all areas except Coast, where there was a heavy concentration, particularly in Malindi. This resulted in six teams being directed to that coastal area in order to have comprehensive coverage.

Figure 1.1: Concentration of some natural tourism attractions



### **1.7 Survey challenges**

This study was the first attempt towards having comprehensive statistics on tourism accommodation in country. As a result, the survey encountered a number of challenges mainly during data collection. Below are some of the challenges:

- Lack of information on the number of facilities and their physical locations;
- Long distances to facilities, which were also far apart;
- Difficulties in travelling to the facilities due to poor terrain;
- Difficulties in accessing the premises as proprietors are not used to visits by government officers;
- Lack of proper record keeping by the by administrators of the facilities;
- Inability of proprietors to differentiate between the roles of various government agencies;
- Effects of seasonality in the tourism industry, where some establishments are only opening during certain periods;
- Communication barrier, where the proprietors could only speak foreign languages;
- Problems differentiating second homes and the facilities; and

### **1.8 Data capture and validation**

Data processing started with editing the filled questionnaires. During editing, logical checks were carried on the filled questionnaires to ascertain that all inconsistencies were corrected. Totals on the number of visitors and guest nights were validated with their breakdown to ensure they tallied. Information on the type of stay unit and catering and applicable rates was critically checked for correctness. Finally, statistics on the number of employees, revenue receipt, gross income and intermediate consumption was also checked to ensure it referred to the period indicated on the questionnaire.

After editing, keying of the data was done using CsPro data entry screen. For verification, a second round of data entry was done; all the questionnaires were re-entered and any discrepancy noted between the two rounds was corrected. Thereafter any duplicates were also sorted and removed.

### **1.9 Data analysis**

The data captured was converted into SPSS for analysis. These resulted in generation of relevant tabulations as indicated in the tables in the following chapters.

### **1.10 Survey limitations**

Owing to the fact that this study was the first of its kind to be conducted, there were some limitations that were noted thereafter. These included:-

- Lack of a checklist for the enterprises leading to a lot of time trying to locate the facilities;
- Some of the facilities operate very informally hence no proper record keeping;
- Closure of some facilities during the low season hence only guards were found; and
- Lack cooperation from some respondents for fear that the same information will be shared with tax authorities.

## CHAPTER TWO: DISTRIBUTION OF FACILITIES

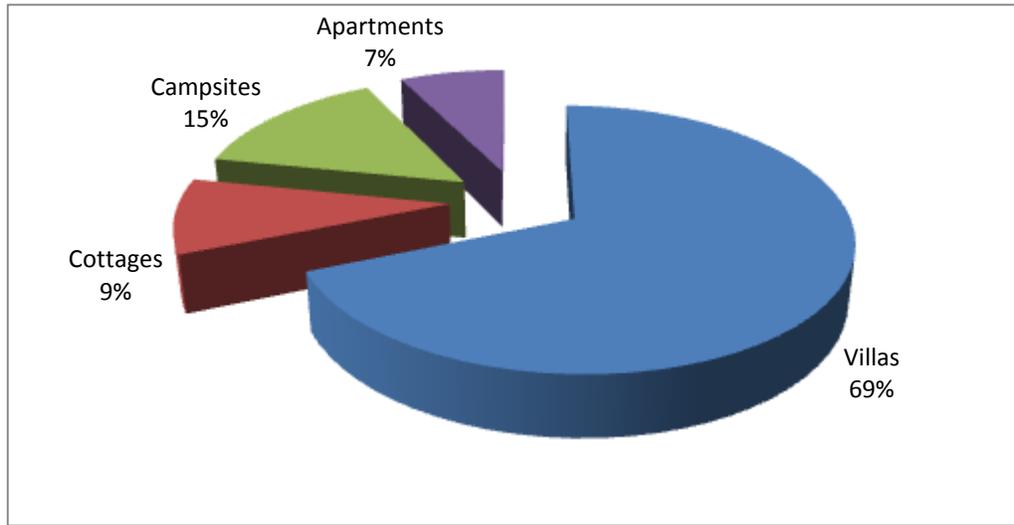
### 2.1 Geographical distribution of facilities

This chapter discusses the distribution of accommodation facilities in the areas visited from January to June 2010 as shown in Table 2.1 and figure 2.1. The attraction of tourists to the coastal region has encouraged the residents to convert their units to be tourist facilities. The Villas take 68.8 per cent of the total accommodation facilities with majority concentrated in Malindi, while Apartments being the least with 7.4 per cent. Most of these accommodation facilities were found in Malindi which accounted for 59.4 per cent and Tana River having the least with 0.2 per cent of the total accommodation facilities. Generally, the coastal region had more than a half of these accommodation facilities in the country.

**Table 2.1: Type of accommodation facility by zone, January – June 2010.**

Zones	Number				
	Villas	Cottages	Campsites	Apartments	Total
Kwale	33	24	3	5	65
Mombasa	14	4	2	13	33
Kilifi	89	3	-	6	98
Malindi	662	20	4	47	733
Tana River	-	-	2	-	2
Lamu	46	2	-	1	49
Tsavo	-	8	35	-	43
Central Province, Embu, Meru, Laikipia	4	22	29	2	57
Western Province	-	4	18	-	22
Nakuru and Upper Rift excluding Laikipia, Samburu	-	14	8	3	25
Kericho, Nyanza province	1	6	5	5	17
Upper Eastern (Isiolo, Marsabit, Samburu)	-	2	12	-	14
Kajiado	-	5	20	-	25
Narok, Transmara	-	1	39	-	40
Nairobi	-	1	1	9	11
<b>Total</b>	<b>849</b>	<b>116</b>	<b>178</b>	<b>91</b>	<b>1,234</b>

**Figure 2.1: Percentage distribution of the accommodation facilities, January-June 2010**



## **2.2 Residence by type of accommodation facility**

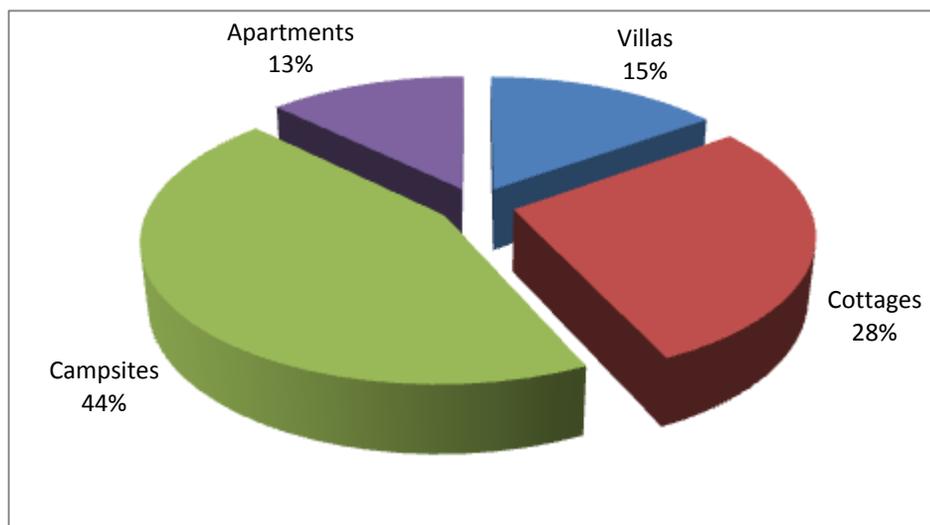
The number of persons by country of residence who visited various types of accommodation facilities from January to June 2010 is presented in Table 2.2. The analysis reveals 45.5 per cent of Kenyans prefer Cottages as a choice of accommodation facility compared to the other facilities with Campsites and Villas representing 27.4 per cent and 17.4 per cent, respectively. Italians seem to prefer the Villas as their choice of accommodation compared to other facilities as 62.4 per cent were located in this facility with other European countries preferring the Campsites.

The Campsites are the most preferred facility as 44.1 per cent were in this facility as can be seen in figure 2.2.

**Table 2.2: Persons by country of residence and type of accommodation facility, January-June 2010**

Country of residence					Number
	Villas	Cottages	Campsites	Apartments	Total
Permanent occupants	4,468	1,031	1,152	882	7,533
Kenya	16,444	42,971	25,919	9,146	94,480
Uganda	778	212	202	357	1,549
Tanzania	108	138	310	465	1,021
North Africa	17	62	104	74	257
Central & East Africa	60	116	144	420	740
West Africa	31	75	260	424	790
South Africa	71	526	425	4,811	5,833
Other Africa	28	316	1,093	63	1,500
United Kingdom	1,413	4,876	14,176	2,312	22,777
German	974	1,195	13,007	929	16,105
France	2,559	1,772	13,578	542	18,451
Italy	14,288	1,504	5,543	1,574	22,909
Switzerland	298	539	1,061	327	2,225
Scandinavia	225	1,003	2,168	287	3,683
Other Europe	642	1,471	8,332	214	10,659
USA	498	5,005	9,661	9,708	24,872
Canada	97	1,093	1,457	1,949	4,596
Other America	26	306	1,572	101	2,005
Japan	11	866	2,429	117	3,423
India	44	2,369	2,987	258	5,658
Middle East	85	150	344	245	824
China	14	1,558	1,379	287	3,238
Other Asia	35	272	521	365	1,193
Australia & New Zealand	88	621	1,771	595	3,075
All other countries persons	30	10,523	16,999	142	27,694
<b>Total</b>	<b>43,332</b>	<b>80,570</b>	<b>126,594</b>	<b>36,594</b>	<b>287,090</b>

**Figure 2.2: Percentage distribution of preferred accommodation facility, January-June 2010**



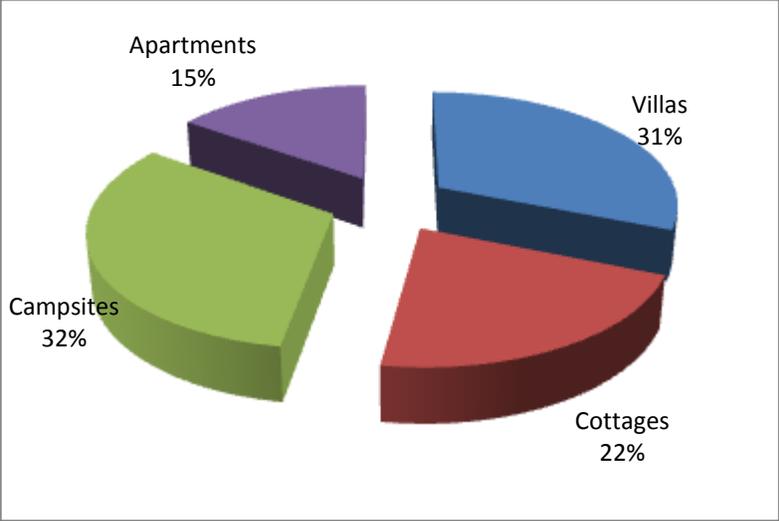
### **2.3 Nights spent by residence and type of accommodation facility**

Table 2.3 and Figure 2.3 illustrate the number of nights spent by country of residence and type of accommodation facility from January to June 2010. The highest number of nights was recorded in the Campsites (32.3 per cent) with Villas taking the second position at 31.1 per cent. The share of nights by residents in Villas was highest with Italians, accounting for 36.2 per cent of the total villa nights while China had the least nights. In the Cottages, Kenyans formed 51.8 per cent of the nights with United Kingdom following with 7.6 per cent of the total nights.

**Table 2.3: Total number of nights spent by country of residence and type of accommodation facility, January-June 2010**

Country of residence					Number
	Villas	Cottages	Campsites	Apartments	Total
Permanent occupants	38,037	2,121	6,490	16,197	62,845
Kenya	29,343	55,653	41,323	21,445	147,764
Uganda	912	216	384	660	2,172
Tanzania	716	149	1,018	965	2,848
North Africa	116	62	149	69	396
Central & East Africa	401	141	398	390	1,330
West Africa	181	178	628	640	1,627
South Africa	452	570	850	5,012	6,884
Other Africa	156	348	1,948	84	2,536
United Kingdom	7,879	8,162	13,845	2,782	32,668
German	6,186	2,559	11,457	1,563	21,765
France	4,675	2,455	7,863	757	15,750
Italy	56,609	6,272	7,311	8,919	79,111
Switzerland	1,904	958	1,890	710	5,462
Scandinavia	1,429	1,296	4,213	823	7,761
Other Europe	3,094	1,759	10,187	578	15,618
USA	1,496	6,304	8,874	9,706	26,380
Canada	346	1,117	4,090	2,015	7,568
Other America	75	349	2,068	114	2,606
Japan	66	902	7,596	193	8,757
India	144	2,378	4,339	280	7,141
Middle East	208	149	470	425	1,252
China	37	1,581	1,714	1,113	4,445
Other Asia	424	276	1,036	181	1,917
Australia & New Zealand	977	769	2,910	666	5,322
All other countries	313	10,756	19,050	260	30,379
<b>Total</b>	<b>156,176</b>	<b>107,480</b>	<b>162,103</b>	<b>76,547</b>	<b>502,306</b>

Figure 2.3: Percentage share of nights spent by accommodation facility, January-June 2010



Analysis of the average number of nights spent by residence and type of facility is presented in Table 2.4. The analysis show that guests spend more nights on average in Villas compared to other facilities as they spend 5.47 bed nights in Villas, followed by 2.72 bed nights in Campsites.

**Table 2.4: Mean number of nights spent by residence by type of accommodation facility, January-June 2010**

Country of residence	Type of accommodation facility				Number
	Villas	Cottages	Campsites	Apartments	Mean
Permanent occupants	9	2	6	18	8
Kenya	2	1	3	2	2
Uganda	1	1	2	2	1
Tanzania	7	1	3	2	3
North Africa	7	1	1	1	2
Central & East Africa	7	1	3	1	2
West Africa	6	2	2	2	2
South Africa	6	1	2	1	1
Other Africa	6	1	2	1	2
United Kingdom	6	2	5	1	4
German	6	2	4	2	4
France	2	1	3	1	3
Italy	4	4	1	6	3
Switzerland	6	2	2	2	2
Scandinavia	6	1	2	3	2
Other Europe	5	1	6	3	5
USA	3	1	4	1	2
Canada	4	1	3	1	2
Other America	3	1	1	1	1
Japan	6	1	6	2	5
India	3	1	1	1	1
Middle East	2	1	1	2	2
China	3	1	1	4	1
Other Asia	12	1	2	1	2
Australia & New Zealand	11	1	2	1	2
All other countries	10	1	1	2	1

## CHAPTER THREE: FACILITY USAGE

### 3.1 Facility usage by type of accommodation facility

The number of persons who visited the Villas, Campsites, Cottages and Apartments from January to June 2010 was 287,090 as shown in Table 3.1. The Campsites received the highest number of 126,594 visitors constituting 44.1 per cent of the total. Apartments received the least number of 36,594 visitors constituting 12.7 per cent of the total visitors.

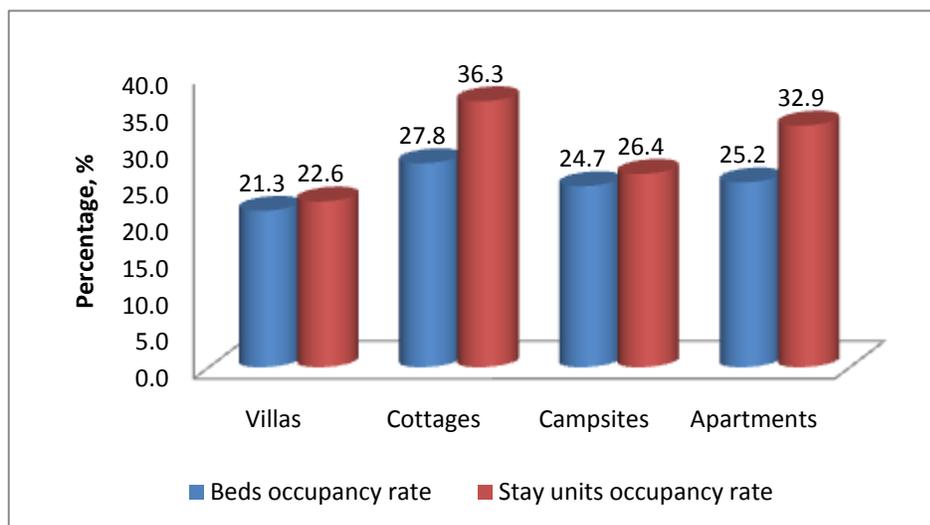
Beds occupied in these facilities were 587,273 with Campsites having the highest proportion at 33.8 per cent and the Apartments having the least at 14.1 per cent. The total bed capacity stood at 2,406,187, with Campsites also taking the biggest share at 33.4 per cent closely followed by Villas at 30.9 per cent. Consequently, the overall beds occupancy rate as illustrated in Figure 3.1 was 24.4 per cent with Cottages taking lead at 27.8 per cent compared to Villas with the lowest beds occupancy rate 21.3 per cent.

The number of stay units occupied in these accommodation facilities was 333,969. Out of these, Campsites had the highest share at 30.7 per cent, closely followed by Cottages at 28.9 per cent. Apartments had the lowest proportion with 16.5 per cent. Overall, the stay units' occupancy rate was 28.4 per cent with Cottages having the highest share 36.3 per cent compared to Villas at 22.6 per cent.

**Table 3.1: Distribution of facility usage by type of accommodation facility, January - June 2010.**

	Type of accommodation facility				Number
	Villas	Cottages	Campsites	Apartments	Total
Persons	43,332	80,570	126,594	36,594	287,090
Total nights	156,176	107,480	162,103	76,547	502,306
Beds occupied	158,571	147,318	198,532	82,852	587,273
Beds available	743,597	529,654	804,075	328,861	2,406,187
Stay units occupied	79,787	96,548	102,562	55,072	333,969
Stay units available	353,094	266,145	389,010	167,157	1,175,406
Beds occupancy rate	21.3	27.8	24.7	25.2	24.4
Stay units occupancy rate	22.6	36.3	26.4	32.9	28.4

**Figure 3.1: Beds and stay units and occupancy rates by type of facility, January-June 2010**



### **3.2 Bed occupancy and capacity by type of accommodation facility and zone**

Table 3.2(a) and Figure 3.2 provide findings on bed occupancy and capacity status by accommodation facility and tourist zone for the first two quarters of 2010. This thus provides a summary of the facility demand alongside the available supply of facilities. It is evident that all facilities recorded below average bed occupancy. The maximum mean bed capacity across the quarters in all the facilities was about 13,000 beds which were provided by the Campsites. The lowest mean bed capacity for the two quarters across the facilities was about 3,000 beds which were provided by the Villas. The maximum quarterly mean bed occupancy across the facilities was about 5,000 beds by the Campsites while the lowest mean bed capacity for the two quarters across the facilities was about 500 beds by the Villas.

The substantial investments in Villas bed capacity have been made in Kwale, Mombasa, Kilifi , Malindi and Lamu zones which in aggregate contributed over 99 per cent to the total Villas bed capacity. Cottages bed capacity was largely from Malindi, Kwale, Central Province, Embu, Meru, Laikipia, Nakuru and Upper Rift excluding Laikipia, Samburu areas accounting for 62 per cent of total bed capacity. Bed capacity arising from Campsites was largely from Kwale, Tsavo, Central Province, Embu, Meru, Laikipia, Kajiado, Narok, Transmara contributing 82 per cent to total camp sites bed capacity.

Table 3.2(a): Total Beds occupied, beds capacity by type of facility, January-June 2010

Zones	Total beds occupied								Total beds capacity							
	Villas		Cottages		Campsites		Apartments		Villas		Cottages		Campsites		Apartments	
	1st Quarter	2nd Quarter	1st Quarter	2nd Quarter	1st Quarter	2nd Quarter	1st Quarter	2nd Quarter	1st Quarter	2nd Quarter	1st Quarter	2nd Quarter	1st Quarter	2nd Quarter	1st Quarter	2nd Quarter
Kwale	16,238	19,639	11,426	10,903	2,082	4,141	2,317	3,173	62,063	53,538	32,710	42,162	25,988	20,034	4,298	4,202
Mombasa	6,435	4,376	731	836	273	371	7,806	7,136	40,351	50,378	7,398	9,880	1,729	1,729	26,258	32,235
Kilifi	4,357	9,139	250	206	-	-	3,902	2,878	49,354	49,733	2,250	2,275	-	-	15,601	23,251
Malindi	24,865	68,281	5,405	23,206	215	734	2,244	15,684	246,169	136,911	57,431	54,022	2,275	1,729	52,044	45,098
Tana River	-	-	-	-	129	405	-	-	-	-	-	-	2,520	2,548	-	-
Lamu	1,487	2,794	63	-	-	-	46	285	23,507	23,493	1,298	6,862	-	-	590	1,090
Tsavo	-	-	7,867	4,348	16,463	16,829	-	-	-	-	13,122	13,738	65,803	69,198	-	-
Central Province, Embu, Meru, Laikipia	568	248	10,473	11,641	28,451	28,922	292	114	1,800	4,260	62,972	50,707	64,073	65,511	4,590	4,641
Western Province	-	-	661	316	2,581	3,156	-	-	-	-	3,618	4,957	23,268	26,412	-	-
Nakuru and Upper Rift excluding Laikipia, Samburu	-	-	29,531	21,854	2,124	3,295	800	602	-	-	56,991	60,053	11,700	11,080	3,150	11,465
Kericho, Nyanza province	55	51	849	707	449	380	1,135	1,202	528	552	4,177	4,299	4,118	3,783	3,345	3,699
Upper Eastern (Isiolo, Marsabit, Samburu)	-	-	123	6	2,805	3,427	-	-	-	-	2,520	3,028	21,587	16,485	-	-
Kajiado	-	-	2,343	1,245	23,565	29,533	15	-	-	-	11,790	13,091	108,236	108,426	-	510
Narok, Transmara	38	-	169	636	11,676	16,234	-	-	-	960	1,954	1,080	65,822	65,541	-	-
Nairobi	-	-	264	1,259	120	172	15,076	18,145	-	-	2,890	2,379	7,200	7,280	50,387	42,407
Total	54,043	104,528	70,155	77,163	90,933	107,599	33,633	49,219	423,772	319,825	261,121	268,533	404,319	399,756	160,263	168,598

Figure 3.2: Mean beds occupied and bed capacity by type of facility, January-June 2010

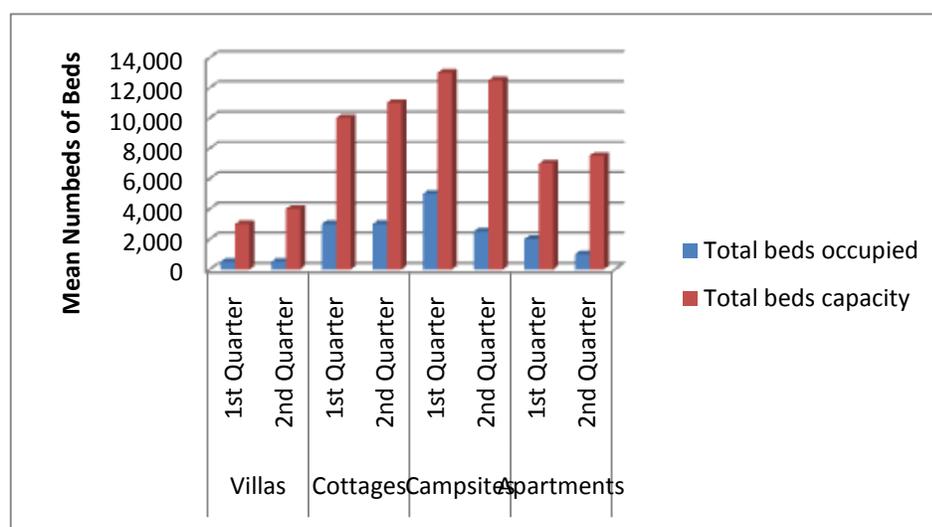


Table 3.2(b) provides findings on the stay units' occupancy and capacity status by accommodation facility and tourist zone for the first two quarters of 2010. It is evident that all facilities have varied stay occupancy as well as capacity across the various zones. The total recorded stay units capacity was 1,175,406. The main contributors to these stay units capacity included Malindi, Central Province, Embu, Meru, Laikipia and Kajiado contributing 50 per cent of the total stay units. The total recorded stay units occupancy stood at 333,969. The same zones also contributed to these stay units occupancy with a share of 51 per cent of the total stay units occupied. There was no clear trend in the total number of stay units occupied between the first and second quarter of the year 2010. The same is true for the total stay units' capacity.

Table 3.2(b) : Stay units occupied and stay units capacity by type of facility, January-June 2010

Zones	Total stay units occupied								Total stay units capacity								Number
	Villas		Cottages		Campsites		Apartments		Villas		Cottages		Campsites		Apartments		
	1st Quarter	2nd Quarter	1st Quarter	2nd Quarter	1st Quarter	2nd Quarter	1st Quarter	2nd Quarter	1st Quarter	2nd Quarter	1st Quarter	2nd Quarter	1st Quarter	2nd Quarter	1st Quarter	2nd Quarter	
	Quarter	Quarter	Quarter	Quarter	Quarter	Quarter	Quarter	Quarter	Quarter	Quarter	Quarter	Quarter	Quarter	Quarter	Quarter	Quarter	
Kwale	5,828	7,885	8,163	4,240	222	190	1,306	1,762	32,581	28,371	11,582	20,605	3,125	3,818	2,411	2,377	
Mombasa	3,017	1,984	259	175	107	96	5,188	5,111	17,088	22,173	3,342	4,390	1,092	1,092	15,574	18,820	
Kilifi	2,005	3,406	118	312	-	-	1,931	1,213	12,318	13,356	1,800	1,820	-	-	7,208	10,764	
Malindi	19,791	34,094	4,514	19,262	-	58	1,481	5,737	128,925	80,974	29,012	25,880	1,252	1,001	29,282	26,649	
Tana River	-	-	-	-	15	138	-	-	-	-	-	-	1,200	1,274	-	-	
Lamu	447	999	41	-	-	-	7	29	6,363	6,144	295	455	-	-	492	758	
Tsavo	-	-	5,053	4,388	4,831	7,072	-	-	-	-	6,800	7,602	28,306	28,850	-	-	
Central Province, Embu, Meru, Laikipia	83	140	8,240	6,459	16,040	12,997	26	17	1,535	1,706	34,665	29,911	30,512	32,249	270	273	
Western Province	-	-	661	316	1,597	2,442	-	-	-	-	2,684	4,021	16,023	15,990	-	-	
Nakuru and Upper Rift excluding Laikipia, Samburu	-	-	15,354	13,322	944	1,074	16	6	-	-	27,361	30,517	4,588	3,611	180	2,189	
Kericho, Nyanza province	52	38	616	537	302	523	674	454	528	552	2,855	3,232	3,386	3,174	2,553	2,742	
Upper Eastern (Isiolo, Marsabit, Samburu)	-	-	14	6	455	1,099	-	-	-	-	180	422	10,809	8,168	-	-	
Kajiado	-	-	2,506	1,185	17,452	21,086	15	-	-	-	6,750	7,215	59,735	60,873	-	450	
Narok, Transmara	18	-	-	59	6,341	7,189	-	-	-	480	606	180	32,544	31,813	-	-	
Nairobi	-	-	115	633	120	172	15,105	14,994	-	-	1,170	793	2,250	2,275	28,086	16,079	
Total	31,241	48,546	45,654	50,894	48,426	54,136	25,749	29,323	199,338	153,756	129,102	137,043	194,822	194,188	86,056	81,101	

### 3.3 Bed and stay units occupancy rates for facility by tourist zone

Table 3.3 shows the bed and stay units occupancy rates for the various facilities in the different zones. Kwale and Tsavo zones recorded bed occupancy rates above 50 per cent for Cottages and Apartments, respectively. The rest of facilities generally had low bed occupancy rates. Zones with bed occupancy rates of less than 5 per cent included Narok/Transmara-Villas, Upper Eastern (Isiolo, Marsabit, Samburu) and Lamu -Cottages, Nairobi-camp sites and

Central province and Kajiado Apartments. Stay units occupancy rates that recorded more than 50 per cent include Kwale and Nairobi- Apartments and Tsavo-Cottages, respectively. The rest of facilities recorded low stay units occupancy rates. Zones with stay unit occupancy rates of less than 5 per cent included Narok/Transmara-Villas, Upper Eastern (Isiolo,Marsabit, Samburu) –Cottages, and Nakuru and Upper Rift excluding Laikipia, Samburu, Lamu, and Kajiado Apartments.

**Table 3.3: Bed and stay units occupancy by zone and type of accommodation facility, January-June 2010**

Zones	Number							
	Villas		Cottages		Campsites		Apartments	
	Bed occupancy rates (%)	Stay units occupancy rates (%)	Bed occupancy rates (%)	Stay units occupancy rates (%)	Bed occupancy rates (%)	Stay units occupancy rates (%)	Bed occupancy rates (%)	Stay units occupancy rates (%)
Kwale	31.0	22.5	29.8	38.5	13.5	5.9	64.6	64.1
Mombasa	11.9	12.7	9.1	5.6	18.6	9.3	25.5	29.9
Kilifi	13.6	21.1	10.1	11.9	-	-	17.5	17.5
Malindi	24.3	25.7	25.7	43.3	23.7	2.6	18.5	12.9
Tana River	-	-	-	-	10.5	6.2	-	-
Lamu	9.1	11.6	0.8	5.5	-	-	19.7	2.9
Tsavo	-	-	82.7	65.6	24.7	20.8	-	-
Central Province, Embu, Meru, Laikipia	13.5	6.9	19.5	29.0	44.3	46.3	4.4	7.9
Western Province	-	-	11.4	14.6	11.5	12.6	-	-
Nakuru and Upper Rift excluding Laikipia, Samburu	-	-	43.9	49.5	23.8	24.6	9.6	0.9
Kericho, Nyanza province	9.8	8.3	18.4	18.9	10.5	12.6	33.2	21.3
Upper Eastern (Isiolo,Marsabit, Samburu)	-	-	2.3	3.3	16.4	8.2	-	-
Kajiado	-	-	18.4	26.4	24.5	32.0	2.9	3.3
Narok, Transmara	4.0	3.8	26.5	7.5	21.2	21.0	-	-
Nairobi	-	-	28.9	38.1	2.0	6.5	35.8	68.2
Total	21.3	22.6	34.7	37.8	24.7	26.4	25.2	32.9

## CHAPTER FOUR: COST OF ACCOMMODATION FACILITIES

The cost of accommodation in the different facilities under study varied depending on the architectural works, type and nationality of usual clientele, location and assumed status among other factors. During the survey, these were assessed based on the number of bedrooms and the month, which was used to tell the season in the tourism calendar. During analysis, the months were further grouped together into quarters, leading to either first or second quarter. The first quarter comprised of the months January to March and implied high season. Ordinarily, the high season is characterized by high tourism numbers while facilities respond by increasing the prices for the occupancy rates. The second quarter occurs during the months of April to June and represents the low tourism season in Kenya. During this period, the number of foreign tourists' decreases significantly reduces. This chapter gives further insights into the cost structures of the facilities as outlined below.

### 4.1 Mean rate of accommodation by type, number of bedrooms and location of facility

The mean cost of accommodation was analyzed based on the location of facility, type and number of bedrooms as presented in Table 4.1. In general, bedroom charges are higher during the high season than the low tourism period. This is in harmony with the tourism calendar where demand is higher during the peak period. During the low season, price incentives are usually offered to attract more visitors, especially domestic tourists. The accommodation charges increase depending on the number of bedrooms irrespective of season. Villas offer more expensive accommodation in Lamu, Mombasa and Kilifi areas which averaged KSh 27,176, KSh 16,409 and KSh 15,964, respectively, regardless of the number of bedrooms. Similarly, bedroom charges are higher for Cottages in Upper Eastern (Isiolo, Samburu and Marsabit), Mombasa and Lamu while the same applies for Campsites around Mt. Kenya region. Accommodation in Apartments was generally found to remain almost at the same levels for the two seasons albeit remaining high in all areas. High room rates were mainly found in Nakuru and Upper Rift Valley, and Kwale areas. This characteristic could be explained by the nature of tourists who opt for this type of accommodation.

During the second quarter, Villas were most expensive around Mt. Kenya, Lamu and Kilifi which averaged KSh 44,800, KSh 25,622 and KSh 15,500 in 2010. Cottages in Mombasa were rated highest at KSh 40,333, the same as the first quarter rate. Campsites sold the highest around Mt. Kenya area at an average of KSh 29,564 while Apartments were rated highest in Kericho and Nyanza Province zone at KSh 48,857.

**Table 4.1: Accommodation rates by type of bedrooms for the various facilities by zone, January-June 2010**

Zones	Type of bedrooms	1st Quarter	2nd Quarter	Total						
Kwale	Rate of one bedroom	7,635	6,990	5,259	4,700	1,000	4,500	40,000	40,000	7,686
	Rate of two bedrooms	7,784	6,564	10,603	9,065	2,000	2,000	24,429	24,250	9,444
	Rate of three bedrooms	12,154	9,853	13,456	11,831	-	-	-	-	12,025
	Rate of other bedroom sizes	9,989	13,920	18,251	17,181	-	-	30,000	30,000	15,160
Mombasa	Rate of one bedroom	4,139	3,889	2,442	2,500	-	-	2,500	2,483	2,997
	Rate of two bedrooms	16,409	8,583	4,833	5,000	-	-	3,947	4,190	6,740
	Rate of three bedrooms	16,139	13,222	-	-	-	-	6,094	6,300	8,742
	Rate of other bedroom sizes	2,143	2,333	40,333	40,333	-	-	3,500	3,500	9,412
Kilifi	Rate of one bedroom	-	-	1,500	1,500	-	-	1,500	1,500	1,500
	Rate of two bedrooms	13,050	11,600	2,900	2,767	-	-	1,850	2,014	6,303
	Rate of three bedrooms	14,880	14,450	2,833	2,500	-	-	-	-	12,678
	Rate of other bedroom sizes	15,964	15,500	800	800	-	-	14,700	14,700	13,557
Malindi	Rate of one bedroom	2,442	2,307	4,678	4,953	2,736	1,275	3,320	3,177	2,924
	Rate of two bedrooms	3,078	2,964	5,319	6,393	-	-	15,300	11,938	5,671
	Rate of three bedrooms	10,904	7,951	5,475	-	-	-	-	-	9,533
	Rate of other bedroom sizes	7,803	7,621	4,655	2,573	1,025	1,025	-	1,800	6,447
Tana River	Rate of one bedroom	-	-	-	-	875	875	-	-	875
	Rate of two bedrooms	-	-	-	-	1,650	1,650	-	-	1,650
	Rate of three bedrooms	-	-	-	-	4,200	4,200	-	-	4,200
	Rate of other bedroom sizes	-	-	-	-	-	-	-	-	-
Lamu	Rate of one bedroom	3,000	2,667	20,400	10,200	-	-	5,000	5,000	5,264
	Rate of two bedrooms	4,750	4,500	33,067	20,400	-	-	-	-	10,387
	Rate of three bedrooms	10,500	10,000	10,200	-	-	-	-	-	10,243
	Rate of other bedroom sizes	27,176	25,622	10,200	10,200	-	-	-	-	25,174
Tsavo	Rate of one bedroom	-	-	2,955	2,357	6,757	5,846	-	-	5,487
	Rate of two bedrooms	-	-	3,375	2,550	6,905	6,335	-	-	5,228
	Rate of three bedrooms	-	-	5,500	5,500	16,347	15,663	-	-	13,498
	Rate of other bedroom sizes	-	-	700	700	13,870	13,000	-	-	8,039
Central Province, Embu, Meru, Laikipia	Rate of one bedroom	-	44,800	13,581	14,721	17,401	15,515	6,000	6,000	15,175
	Rate of two bedrooms	-	-	19,763	18,510	16,626	13,625	7,000	7,000	16,467
	Rate of three bedrooms	-	-	11,977	11,900	37,630	29,564	14,300	14,300	22,823
	Rate of other bedroom sizes	4,350	4,350	9,003	8,241	6,590	7,570	-	-	7,428
Western Province	Rate of one bedroom	-	-	4,420	4,307	2,670	2,276	-	-	2,935
	Rate of two bedrooms	-	-	750	750	2,000	2,250	-	-	1,833
	Rate of three bedrooms	-	-	1,050	1,663	3,688	5,225	-	-	2,829
	Rate of other bedroom sizes	-	-	-	-	1,933	1,872	-	-	1,902
Nakuru and Upper Rift excluding Laikipia, Samburu	Rate of one bedroom	-	-	12,753	7,017	21,700	16,525	1,833	2,000	10,328
	Rate of two bedrooms	-	-	13,415	13,518	-	-	2,667	3,000	11,337
	Rate of three bedrooms	-	-	18,710	14,731	3,000	3,000	-	4,500	12,006
	Rate of other bedroom sizes	-	-	8,750	8,000	500	500	-	4,000	4,321
Kericho, Nyanza province	Rate of one bedroom	2,500	2,500	2,863	3,433	4,250	3,500	15,500	13,731	7,967
	Rate of two bedrooms	-	-	-	-	-	-	27,000	28,857	28,000
	Rate of three bedrooms	2,000	-	-	-	-	-	46,000	48,857	44,000
	Rate of other bedroom sizes	2,000	2,000	2,000	2,000	-	850	-	-	1,904
Upper Eastern (Isiolo, Marsabit, Samburu)	Rate of one bedroom	-	-	-	-	11,544	11,089	-	-	11,343
	Rate of two bedrooms	-	-	-	27,440	20,983	18,853	-	-	20,298
	Rate of three bedrooms	-	-	-	-	17,112	7,463	-	-	14,143
	Rate of other bedroom sizes	-	-	45,500	31,500	700	700	-	-	13,300
Kajiado	Rate of one bedroom	-	-	2,117	2,439	6,047	5,784	-	1,200	5,104
	Rate of two bedrooms	-	-	3,500	3,500	7,482	6,635	-	-	6,613
	Rate of three bedrooms	-	-	4,750	4,750	8,250	8,200	-	-	7,300
	Rate of other bedroom sizes	-	-	-	-	-	-	-	-	-
Narok, Transmara	Rate of one bedroom	-	-	11,571	-	17,968	13,748	-	-	15,913
	Rate of two bedrooms	-	-	23,142	-	11,621	10,258	-	-	11,136
	Rate of three bedrooms	-	-	17,500	17,500	13,736	9,912	-	-	13,086
	Rate of other bedroom sizes	-	-	17,500	17,500	21,626	18,883	-	-	19,744
Nairobi	Rate of one bedroom	-	-	5,500	5,500	-	-	2,633	2,617	3,177
	Rate of two bedrooms	-	-	-	10,000	-	-	3,922	3,917	4,448
	Rate of three bedrooms	-	-	-	-	-	-	5,100	5,460	5,325
	Rate of other bedroom sizes	-	-	-	-	-	-	3,220	3,270	3,240

#### 4.2 Cost of sleeping for facilities by type of accommodation

Table 4.2 below shows the mean cost of sleeping by facility and type of accommodation. The mean cost of accommodation across the various types of accommodation facilities depended on the number of bedrooms. On average, the mean cost of one bedroom was KSh 7,014, which goes up to KSh 9,472 for two bedrooms and KSh 12,829 in case of three bedrooms. Amongst all the four types of accommodation, Villas were least costly at KSh 4,582 while Campsites were most priced at KSh 9,472 for a one bedroom unit. Similarly, among the two bedroom units, prices for Villas least rated at KSh 7,227 although the price variance was not so wide for extremes. In comparison, three bedroom Campsites were the most expensive at KSh 15,574 per night.

**Table 4.2: Mean cost of sleeping by facility by types of accommodation, January-June 2010**

Type of bedrooms	Type of accommodation facility				Mean
	Villas	Cottages	Campsites	Apartments	
One bedroom rate	4,582	7,268	9,472	5,273	7,014
Two bedrooms rate	7,227	10,662	10,004	9,196	9,472
Three bedrooms rate	12,145	11,547	15,152	12,574	12,829
Rate for other bedrooms	13,225	12,828	5,812	9,443	10,458

#### 4.3 Mean cost of sleeping for facilities by zone and type of accommodation

Table 4.3 below shows the mean cost of sleeping facility by type of accommodation and zone. It also shows the availability of some of these facilities is also region specific. For example, in Tana River, camp sites are the only facilities available. Camp sites and Cottages are the only facilities in Tsavo, Narok, Trans Mara and Western province.

Facilities in the coastal region are generally more expensive than up country facilities. Among the one bedroom facilities, Villas were the most expensive around Mt. Kenya at KSh 44,800 followed by Apartments in Kwale which were rated at KSh 40,000 per night. Apartments in Kericho and Nyanza Province zone went for KSh 28,000 and KSh 47,818 per night, the most expensive among two and three bedrooms, respectively.

Table 4.3: Mean cost of sleeping facility and zones by types of accommodation, January-June 2010

KSh.					
Zones	Type of Facility	Rate of one bedroom	Rate of two bedrooms	Rate of three bedrooms	Rate of other bedroom sizes
Kwale	Villas	7,240	6,984	10,429	11,876
	Cottages	4,962	9,737	12,660	17,731
	Campsites	3,000	2,000	-	-
	Apartments	40,000	24,364	-	30,000
	Mean	7,636	9,354	11,868	15,160
Mombasa	Villas	3,988	13,635	14,713	2,184
	Cottages	2,473	4,929	-	40,333
	Apartments	2,462	4,057	6,060	3,577
	Mean	2,989	7,167	8,682	9,496
Kilifi	Villas	-	12,269	14,674	15,724
	Cottages	1,500	2,843	2,700	800
	Apartment	1,536	1,886	-	13,600
	Mean	1,529	6,053	2,678	13,283
Malindi	Villas	2,352	3,020	9,920	7,714
	Cottages	4,795	5,715	5,475	3,763
	Campsites	2,062	-	-	1,025
	Apartments	3,180	14,487	-	1,800
	Mean	2,894	5,996	9,533	6,447
Tana River	Campsites	875	1,650	4,200	-
	Mean	875	1,650	4,200	-
Lamu	Villas	2,833	4,618	10,250	26,449
	Cottages	14,280	26,733	10,200	10,200
	Apartments	5,000	-	-	-
	Mean	5,264	10,387	10,243	25,174
Tsavo	Cottages	2,711	3,000	5,500	700
	Campsites	6,072	6,541	16,023	13,544
	Mean	5,293	5,198	13,498	7,550
	Villas	44,800	-	-	4,350
Central Province, Embu, Meru, Laikipia	Cottages	14,058	19,051	11,942	8,693
	Campsites	16,407	14,933	32,960	7,015
	Apartments	6,000	7,000	14,300	-
	Mean	15,359	16,434	22,823	7,428
	Cottages	4,596	750	1,750	-
Western Province	Campsites	2,499	2,118	4,200	1,902
	Mean	3,023	1,833	2,881	1,902
	Cottages	9,799	13,264	16,825	8,422
Nakuru and Upper Rift excluding Laikipia, Kericho, Nyanza province	Campsites	18,743	-	3,000	500
	Apartments	1,917	2,833	4,500	4,000
	Mean	10,124	11,245	12,006	4,321
	Villas	2,500	-	2,000	2,000
	Cottages	3,165	-	-	2,000
Upper Eastern (Isiolo, Marsa Masi, Kericho, Kericho, Nyanza province)	Campsites	3,929	-	-	850
	Apartments	14,455	28,000	47,818	-
	Mean	7,967	28,000	44,000	1,904
	Cottages	-	27,440	-	38,500
	Campsites	11,343	20,060	14,143	700
Kajiado	Mean	11,343	20,298	14,143	13,300
	Cottages	2,278	3,500	4,750	-
	Campsites	5,921	7,069	8,227	-
	Apartments	1,200	-	-	-
Narok, Transmara	Mean	5,104	6,613	7,300	-
	Cottages	11,571	23,142	17,500	17,500
	Campsites	15,972	10,914	11,925	20,255
Nairobi	Mean	15,913	11,136	13,086	19,744
	Cottages	5,500	10,000	-	-
	Apartments	2,624	3,919	5,325	3,240
	Mean	3,177	4,448	5,325	3,240

#### 4.4 Mean cost of sleeping for facilities by type of catering

Table 4.4 shows the mean cost of sleeping facility by type of catering. Generally, the mean cost of the various types of accommodation facilities increases with the number of bedrooms and

type of catering. Units offering full catering attract higher bedroom rates at an average of KSh 10,555 and KSh 14,590 per night, for one and three bedroom, respectively. Rates per night for self service varied from KSh 4,163 and KSh 12,837 per night for one and three bedrooms, respectively. Units offering neither full catering nor self services are the least in both the price and variance. Across the different types of catering services, those who were not utilizing any catering service paid the least followed by those who were using self service. A combination of self service and full catering for one bedroom occupants was KSh 4,923 per night and increased to KSh 10,779 for three bed room occupants per night.

**Table 4.4: Mean cost of sleeping facility by type of catering, January-June 2010**

Type of bedrooms	Type of catering				KSh.
	Full catering	Self service	Both self service and Full Catering	None	Mean
One bedroom rate	10,555	4,163	4,923	3,911	7,056
Two bedrooms rate	11,981	8,291	8,513	5,444	9,482
Three bedrooms rate	14,590	12,837	10,779	5,569	12,773
Rate for other bedrooms	11,916	9,853	12,062	4,365	10,125

The mean cost of sleeping facility by type of catering and region is shown in Table 4.5. The mean cost of sleeping facility in most cases varied across the various types of accommodation facilities with increase in the number of bed rooms per unit and type of catering. The mean occupancy price per night in the one bedroom was KSh 7,056 which increases to KSh 12,773 for three bedroom unit. Among the one bedroom units, rate per night did not necessarily depend on the type of catering. This is displayed by the rate of a one bedroom unit in Kwale with no catering which averaged KSh 29,257 per night, followed by full catering around Mt. Kenya at KSh 21,269. Three bedroom units offering self service in Kericho and Nyanza province zone went for KSh 44,000 while a similar unit around Mt. Kenya offering full catering sold for KSh 35,867.

Table 4.5: Mean cost of sleeping facility by type of catering, January-June 2010

		KSh.			
Zones	Types of catering	Rate of one bedroom	Rate of two bedrooms	Rate of three bedrooms	Rate of other bedroom sizes
Kwale	Full catering	8,045	4,567	2,324	6,382
	Self service	5,055	9,525	10,128	14,435
	Both self service and Full Catering	11,486	14,136	21,544	21,983
	None	29,257	7,750	4,700	21,800
Mombasa	Full catering	1,462			3,500
	Self service	2,926	6,110	8,682	10,377
	Both self service and Full Catering	7,333	14,000	-	-
	None	2,929	14,400	-	-
Kilifi	Full catering	1,429	1,850	2,700	6,683
	Self service	1,682	7,263	17,886	19,237
	Both self service and Full Catering	1,000	1,200	4,500	400
	None	-	-	-	9,000
Malindi	Full catering	3,626	4,080	11,100	1,778
	Self service	3,201	8,211	10,904	11,099
	Both self service and Full Catering	3,127	4,433	1,700	1,958
	None	2,137	3,537	-	1,339
Tana River	Full catering	1,500	3,000	4,200	
	Both self service and Full Catering	250	300	-	-
	None				
Lamu	Full catering	3,304	4,618	10,250	11,250
	Self service	-	17,600	-	22,714
	Both self service and Full Catering	14,280	28,560	10,200	24,949
Tsavo	Full catering	7,079	7,500	13,498	7,550
	Self service	2,000	2,000	-	-
	Both self service and Full Catering	1,915	1,786	-	-
	None	550	-	-	-
Central Province, Embu, Meru, Laikipia	Full catering	21,269	22,028	35,867	9,770
	Self service	-	4,000	-	8,550
	Both self service and Full Catering	6,159	7,483	11,209	8,309
	None	1,753	1,200	7,000	3,420
Western Province	Full catering	550	750	1,050	-
	Self service	2,826	2,450	-	2,100
	Both self service and Full Catering	3,865	2,067	4,450	1,008
	None				
Nakuru and Upper Rift excluding Laikipia, Samburu	Full catering	11,789	10,011	16,740	16,688
	Self service	1,000	-	-	227
	Both self service and Full Catering	6,971	12,954	9,720	953
	None	-	-	4,500	-
Kericho, Nyanza province	Full catering	3,223	-	-	-
	Self service	17,028	28,000	44,000	2,000
	None	3,500	-	-	850
Upper Eastern (Isiolo, Marsabit, Samburu)	Full catering	13,825	26,979	29,089	38,500
	Both self service and Full Catering	3,278	3,967	7,500	1,050
	None	2,000	-	-	668
Kajiado	Full catering	5,824	7,522	11,821	-
	Self service	1,500	3,000	2,500	-
	Both self service and Full Catering	2,092	3,500	4,750	-
	None	7,750	3,000	2,500	-
Narok, Transmara	Full catering	18,947	10,489	13,271	24,333
	Self service	-	800	17,500	5,125
	Both self service and Full Catering	5,854	17,582	4,600	800
	None	4,200	9,900	-	-
Nairobi	Full catering	2,025	3,300	5,100	3,154
	Both self service and Full Catering	5,000	7,667	-	-
	None	3,033	4,408	6,000	3,440
Mean		7,056	9,482	12,773	10,125

## CHAPTER FIVE: CONTRIBUTION TO THE NATIONAL ECONOMY

### 5.1 Revenue and intermediate consumption

In Kenya, tourism has over the years been an important source of foreign exchange in the economy through the proceeds generated from its sales of goods and services to the international visitors. The sector has also augmented the country's labour market by generating employment. The survey therefore sought to establish the economic significance of the sub-sector to the economy. In this regard, data on revenue from sales of goods and services, cost of intermediate inputs and employment was collected from the businesses.

For the purposes of the survey, revenue was defined as the income from sales of goods and services that visitors ordinarily demand from the tourism businesses. In addition, the survey collected data on the cost of running (intermediate consumption) these facilities to facilitate the computation of the sector's contribution to the gross domestic product (GDP). Services from the accommodation establishments, shopping places, restaurants, local tours and security are the major sources of revenue for tourist sector in the country.

Table 5.1 gives details on monthly average monthly business revenue and intermediate consumption for each type of facility. In 2009, the average revenue collection by Cottages was KSh 1.84 million and was the highest among all the facilities. The average monthly revenue collection for Campsites, Apartments and Villas was KSh 1.82 million, KSh 0.60 million, and KSh 0.21 million, respectively. There were significant differences in the proportion of intermediate consumption to revenue. Cottages and Campsites reported having, respectively spent the equivalent of 54 per cent and 55 per cent of their revenue in their processes of production. On the other hand, Villas and Apartments spent the equivalent of 48 per cent and 47 per cent of their revenues, respectively.

**Table 5.1: Mean monthly business revenue and intermediate consumption by type of facility (KSh.)**

	Type of facility				Mean
	Villas	Cottages	Campsites	Apartments	
Business revenue, 2010	284,283	2,150,824	3,473,515	1,700,932	1,549,049
Business revenue, 2009	211,630	1,837,758	1,819,770	603,919	943,523
Intermediate consumption, 2010	126,533	1,081,203	1,936,466	785,250	812,436
Intermediate consumption, 2009	109,067	1,053,829	998,235	288,873	517,202

KSh.

Table 5.2 presents details of revenue and intermediate consumption for each type of facility by zone. Cottages reported the highest turnover in six of the zones while Villas and Apartments and Campsites topped in business turnover in three zones each.

A salient feature from the survey's results is the way different facilities were doing better in certain zones compared to others. For instance, good performance by Campsites was evident in zones known to harbour national parks and game reserves namely, Kajiado, Narok and Transmara, Isiolo, Marsabit and Samburu and Mt Kenya (Central province, Embu, Meru, and Laikipia). Cottages have thrived in Malindi, Tsavo, Kwale, Kilifi, Western, Nakuru and upper rift, Kericho and Nyanza. Performance of Villas was well manifested in Mombasa, Kwale and Lamu while Apartments were flourishing in Nairobi and Kilifi.

Zones with national parks and game reserves collected more revenue compared to other zones. This could be attributed to the fact that national parks and game reserves are key attractions to high-end tourists. In 2009, Kajiado recorded the highest revenue collection with a mean of KSh 40.4 million while Nakuru and Upper Rift (excluding Laikipia and Samburu) was second with a mean of KSh 40.1 million. In third place was upper Eastern with a mean revenue of KSh 38.1 million while Central Province (including Embu, Meru and Laikipia) was fourth with a revenue of KSh 26.9 million during the same year.

**Table 5.2: Mean business revenue and intermediate consumption by type of facility and zones**

KSh.

Zones	Type of facility	Business revenue for goods and services in reference month	Gross income from goods and services last financial year	Cost of intermediate consumption in reference month	Cost of intermediate consumption for the year 2009
Kwale	Villas	783,558	8,361,884	363,797	4,643,747
	Cottages	521,530	3,253,727	206,293	1,438,989
	Campsites	302,325	4,705,217	147,990	2,470,743
	Apartments	249,727	2,714,824	83,789	707,924
	Zone Mean	624,873	5,989,010	275,357	3,135,784
Mombasa	Villas	901,522	8,904,564	436,109	4,801,251
	Cottages	140,784	777,428	52,782	187,923
	Apartments	619,614	5,988,470	243,686	2,271,675
Kilifi	Zone Mean	661,646	6,421,221	292,011	2,971,944
	Villas	100,564	420,788	22,323	223,973
	Cottages	174,497	2,289,300	38,366	482,495
Malindi	Apartments	262,417	19,587,991	87,900	12,445,035
	Zone Mean	110,645	1,355,737	25,944	796,532
	Villas	266,378	1,993,074	134,150	1,159,058
Tana River	Cottages	1,917,702	9,919,482	482,948	4,523,605
	Campsites	168,798	3,136,020	101,780	1,838,260
	Apartments	484,675	183,281	313,798	91,640
Lamu	Zone Mean	461,200	2,412,022	190,292	1,276,156
	Campsites	115,113	1,412,000	42,723	676,000
	Zone Mean	115,113	1,412,000	42,723	676,000
Tsavo	Villas	141,514	1,561,279	61,731	371,820
	Cottages	104,560	76,800	3,200	38,400
	Apartments	333,333	3,000,000	46,667	413,600
Central Province, Embu, Meru, Laikipia	Zone Mean	143,306	1,560,146	60,182	364,602
	Cottages	2,690,384	25,847,844	2,159,726	12,722,584
	Campsites	2,353,007	9,216,083	1,091,149	4,574,160
Western Province	Zone Mean	2,440,672	14,205,611	1,368,810	7,018,687
	Villas	1,635,102	14,702,744	682,502	5,656,102
	Cottages	2,956,248	47,605,565	1,630,193	28,512,854
Nakuru and Upper Rift excluding Laikipia, Kericho, Nyanza province	Campsites	3,409,310	28,415,860	1,935,383	16,456,668
	Apartments	643,668	12,335,212	290,010	5,624,908
	Zone Mean	3,013,389	34,419,235	1,677,939	20,098,629
Upper Eastern (Isiolo, Marsa Kajiado)	Cottages	1,607,000	13,000,000	673,350	5,000,000
	Campsites	113,346	719,828	56,993	398,722
	Zone Mean	254,850	1,471,676	115,385	680,433
Narok, Transmara	Cottages	4,764,436	55,498,890	2,469,483	30,791,664
	Campsites	75,023	4,333,091	20,200	1,994,545
	Apartments	203,482	1,592,177	84,097	624,660
Nairobi	Zone Mean	3,045,534	40,086,255	1,571,184	22,136,954
	Villas	33,000	155,200	5,800	66,000
	Cottages	3,346,941	7,176,191	1,680,227	4,389,835
Upper Eastern (Isiolo, Marsa Kajiado)	Campsites	1,209,356	2,154,277	605,098	1,368,954
	Apartments	153,823	4,274,338	78,156	2,848,768
	Zone Mean	1,637,871	4,542,245	821,182	2,839,700
Narok, Transmara	Cottages	14,977,551	61,020,666	7,495,883	54,470,931
	Campsites	1,903,221	34,319,402	925,297	17,164,487
	Zone Mean	3,508,840	38,133,869	1,732,211	22,493,979
Nairobi	Cottages	831,962	5,060,092	228,695	2,966,485
	Campsites	4,068,681	52,005,923	2,032,414	30,066,392
	Apartments	1,200,000	580,000	345,000	250,000
Nairobi	Zone Mean	3,351,966	40,442,127	1,632,396	23,389,901
	Villas	221,040	1,583,523	110,866	1,330,395
	Cottages	1,761,044	18,634,436	966,416	10,871,325
Nairobi	Campsites	7,112,897	25,300,378	4,254,256	13,124,858
	Zone Mean	6,898,595	24,894,566	4,123,100	12,963,612
	Cottages	916,007	8,390,154	488,712	3,405,889
Nairobi	Campsites	4,090,349	3,492,242	2,569,490	1,870,752
	Apartments	8,582,183	27,171,207	3,953,444	12,509,825
	Zone Mean	7,395,240	21,683,322	3,487,492	9,966,706

## 5.2 Employment

The number of personnel employed by the various types of facilities is provided in Table 5.3 while more disaggregated data is given in the subsequent tables. Data on employment is based on the averages for the month between January and June 2010. The survey results show that the facilities employed a total of 10,908 persons. In every four employees, three were male

Kenyan citizen. Campsites employed the highest number among the facilities with a proportion of 34.7 per cent of the total employment in the sub-sector. Villas and Cottages contributed 31.4 and 25.0 per cent, respectively while Apartments contributed the least at 9.0 per cent.

**Table 5.3: Employees by type of facility, January-June 2010**

Type of Facility	Total	Number		
		Male Citizen employees	Female Citizen Employees	Non_Citizen Employees
Villas	3,422	2,697	714	11
Cottages	2,725	1,935	751	39
Campsites	3,784	3,088	640	56
Apartments	976	617	352	7
<b>Total</b>	<b>10,907</b>	<b>8,337</b>	<b>2,457</b>	<b>113</b>

There were more male employees compared to females across almost all facilities, with an overall ratio of 72:28. However, in Western Province Cottages, female employees were at par with their male counterparts while in Kilifi Apartments, male citizen employees were outnumbered by females. Among Campsites, there were only 640 female employees out of a total of 3,784 employees, reflecting a 16.9 per cent share. This could partly be explained by the remote locations of some of the Campsites, which poses a security risk. Non citizens contributed merely 1.0 per cent of total employment, with Cottages having the highest share of non citizens at 3.2 per cent.

An illustration of employment levels for the various types of tourism facilities is depicted in Figure 5.1 below. It can be seen that for all facilities, the number of male citizen employees by far outnumbers all the other categories, suggesting that the tourism business is dominated by male players.

**Figure 5.1 Number of employees by type of facility and zone**

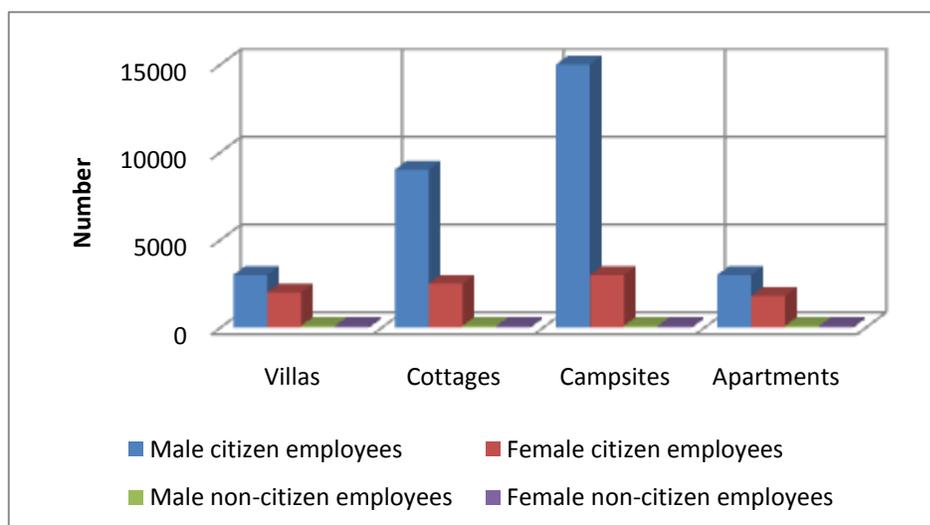


Table 5.4(a) presents details on employment levels in the Villas industry across the cluster zones. The bulk of employees were in Malindi which had 63.7 per cent of 3,422 employees. Kwale and Kilifi had 13.4 and 11.1 per cent, respectively while the rest of the zones contributed 11.8 per cent all together.

**Table 5.4(a): Employment in Villas zone, January-June 2010**

Zones	Number			
	Total	Male Citizen employees	Female Citizen Employees	Non_Citizen Employees
Kwale	459	337	121	1
Mombasa	174	125	49	-
Kilifi	381	301	81	-
Malindi	2,181	1,741	431	8
Lamu	145	137	8	-
Central Province, Embu, Meru, Laikipia	80	55	23	2
Kericho, Nyanza province	3	2	1	-
Narok, Transmara	-	-	-	-
<b>Total</b>	<b>3,422</b>	<b>2,697</b>	<b>714</b>	<b>11</b>

For Cottages, the bulk of the employees were reported in the Central, Upper, and Nakuru and upper Rift with 32.4 per cent and 25.0 per cent, respectively as shown in Table 5.4(b). Cottages had the second highest proportion of female employees with 27.6 per cent of total workforce.

**Table 5.4(b): Employment in Cottages by zone, January-June 2010**

Zones	Number			
	Total	Male Citizen employees	Female Citizen Employees	Non_Citizen Employees
Kwale	270	197	73	1
Mombasa	15	13	2	-
Kilifi	12	8	4	-
Malindi	332	282	46	4
Lamu	15	11	4	-
Tsavo	216	150	60	6
Central Province, Embu, Meru, Laikipia	882	623	252	7
Western Province	24	15	9	-
Nakuru and Upper Rift excluding Laikipia, Samburu	682	429	237	16
Kericho, Nyanza province	51	39	11	1
Upper Eastern (Isiolo, Marsabit, Samburu)	70	50	21	-
Kajiado	106	75	28	3
Narok, Transmara	40	35	5	-
Nairobi	11	9	1	1
<b>Total</b>	<b>2,725</b>	<b>1,935</b>	<b>751</b>	<b>39</b>

Table 5.4(c) shows that Campsites reported to have employed 3,784 persons of which 81.6 per cent were Kenyan males while 16.9 per cent were female. In terms of regional distribution, 84.3 per cent of employees were found in Narok and Transmara, Central, Kajiado, Tsavo, Upper Eastern.

**Table 5.4(c): Employment in Campsites by zone, January-June 2010**

Zones	Number			
	Total	Male Citizen employees	Female Citizen Employees	Non_Citizen Employees
Kwale	54	46	8	-
Mombasa	64	50	14	-
Malindi	17	10	6	1
Tana River	11	8	3	-
Tsavo	497	407	82	9
Central Province, Embu, Meru, Laikipia	902	684	204	14
Western Province	95	65	27	3
Nakuru and Upper Rift excluding Laikipia, Samburu	88	63	24	1
Kericho, Nyanza province	11	10	1	-
Upper Eastern (Isiolo, Marsabit, Samburu)	232	178	46	8
Kajiado	782	645	129	9
Narok, Transmara	1,009	909	90	10
Nairobi	22	14	7	1
Total	3,784	3,088	640	56

Table 5.4(d) presents information on distribution of employees in the apartment industry. Nairobi, Malindi and Mombasa had the bulk of employees and combine had 81.3 per cent of the total workforce. Apartments reported the least number of employees of 976 which was 9.0 per cent of total employment in the sub-sector.

**Table 5.4(d): Employment in Apartments by zone, January-June 2010**

Zones	Number			
	Total	Male Citizen employees	Female Citizen Employees	Non_Citizen Employees
Kwale	18	16	2	-
Mombasa	124	80	41	3
Kilifi	40	19	21	-
Malindi	237	130	105	2
Lamu	15	14	1	-
Central Province, Embu, Meru, Laikipia	52	41	11	-
Nakuru and Upper Rift excluding Laikipia, Samburu	44	23	21	-
Kericho, Nyanza province	14	9	5	-
Kajiado	-	-	-	-
Nairobi	433	285	146	2
Total	976	617	352	7

## CHAPTER SIX: CONCLUSION AND RECOMMENDATION

### 6.1 Conclusion

The survey reveals that the number of Villas, Cottages, Campsites and Apartments offering tourist accommodation has continued to grow thereby offering a different kind of accommodation setup with its own uniqueness as can be seen by the number who managed to visit the facilities within the survey period. Long staying foreign tourists as well as the domestic ones with families do visit these as they offer competitive prices and suitable accommodation. The survey has also revealed that domestic tourists have particular inclination for such facilities as they offer accommodation suitable for a family.

A number of these establishments, though known to offer accommodation besides competing with the hotels for a share of the market, are not even registered. Indeed indications are that the volume of tourists, domestic and foreign, preferring this type of accommodation may be increasing at a fast rate than that remaining in the hotels. This is partly explained by the fact that the rate at which international arrivals is growing at is not in harmony with the growth in bed-occupancy

### 6.2 Recommendation

The study recommends undertaking second phase of the survey to have a feel of the other half of the year which is a high season so as to obtain data to be included in the calculation of hotel occupancy in consequent tourism statistics.

Similarly, this goes along way with allocation of enough resources for the same in order to collect additional data for this sector.

## ANNEX 1: KEY CONCEPTS AND DEFINITIONS USED IN THE SURVEY

### 7.1 Tourism

Tourism is travel for recreational, leisure or business purposes. The World Tourism Organization (WTO) defines tourists as people who "travel to and stay in places outside their usual environment for more than twenty-four (24) hours and not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited".

### 7.2 Usual environment of a person

The main purpose of introducing the concept "*usual environment*" is to exclude from the concept of "*visitor*" persons commuting every day or week between their home and place of work or study, or other places frequently visited. The definition of usual environment is therefore based on the following criteria:

- a) Minimum distance traveled to consider a person a visitor;
- b) Minimum duration of absence from usual place of residence;
- c) Minimum change between localities or administrative territories.

### 7.3 Usual residence

The country of usual residence is one of the key criteria for determining whether a person arriving in a country is a "*visitor*" or "*other traveler*", and if a "visitor", whether s/he is a national or overseas resident. The underlying concept in the classification of international visitors by place of origin is the country of residence, not their nationality.

### 7.4 Nationality

- a) The nationality of a traveler is that of the "Government issuing his/her passport (or other identification document), even if s/he normally resides in another country".
- b) Nationality is indicated in the person's passport (or other identification document), while country of usual residence has to be determined by means of a question. None the less, a traveler is considered either an international or domestic visitor on the basis of his/her residence, not his/her nationality

### 7.5 Duration of stay or trip

The duration of stay or trip is a very important statistical datum since, besides being the most significant measure of the volume of tourism of any kind, it is instrumental in establishing the maximum limit beyond which the visit is no longer considered a tourism visit (one year) and in distinguishing between tourists and same-day visitors, i.e. excursionists.

- a) The duration of stay or trip is also useful, albeit indirectly, for assessing tourism expenditure, especially if the average duration is calculated for homogeneous groups of visitors or trips.
- b) The duration of a visit (stay or trip) is measured in the following units: "the number of hours for same-day visits, and nights for staying visits. For international tourism the duration is measured either in terms of time spent in the receiving country for inbound tourism, or time away from the usual residence for outbound tourism".

### **7.6 Camp**

A tourist camp maybe tented or not. This is a place the offers secluded and simple accommodation and recreation during adventure or vacation/holiday by people while enjoying nature. The following were to be excluded:-

- a) Military or GSU camps;
- b) Those who live outdoors, out of necessity (as in the case of the homeless);
- c) People waiting overnight in queues;
- d) Cultures whose technology does not include sophisticated dwellings.

### **7.7 All-inclusive**

A form of package holiday where the majority of services offered at the destination are included in the price paid prior to departure (e.g. refreshments, excursions, amenities, gratuities, etc).

### **7.8 Bed and breakfast:**

Overnight accommodations usually in a private home or boarding house, with a full or continental breakfast included in the rate.

### **7.9 Carrying-capacity**

In the context of tourism, it refers to the maximum number of tourists a facility can support.

### **7.10 Full house**

A facility with all guest rooms occupied

### **7.11 Commercial rate**

A special rate agreed upon by a company and the accommodation establishment. Usually the establishment agrees to supply rooms of a specified quality or better at a flat rate to corporate clients.

### **7.12 Complimentary room**

A guest room for which no charge is made. Complimentary rooms with a tour group are usually occupied by the tour manager or driver.

### **7.13 High season**

The period of the year when occupancy/usage of the accommodation facility or attraction is normally the highest. High usage invariably means higher prices for rooms or admission. Also referred to as on-season or peak season.

### **7.14 Length of stay**

Number of nights spent in one destination. Most tourist marketing boards seek to find ways of increasing visitors' length of stay

### **7.15 Low season**

That time of the year at any given destination when tourist traffic, and often rates, are at their lowest. Also referred to as off-peak or off-season.

### **7.16 Pax**

Industry abbreviation for passengers or person

### **7.17 Room service**

Food or beverages served in a guest's room

### **7.18 Seasonality**

A phenomenon created by either tourism supply or demand (or both) changing according to the time of the year.

### **7.19 Bed nights**

The total number of nights spent by guests in an accommodation establishment over a given period of time.

### **7.20 Capacity (stay unit nights)**

This is the total capacity of all accommodation establishments in the area. Capacity for each establishment is the number of stay units in the establishment multiplied by the number of days in the month. A stay unit is the unit of accommodation which is available to be charged out to guests, e.g. a cottage.

### **7.21 Number of guest nights**

A guest night is equivalent to one guest spending one night in an establishment. For example, a motel with 15 guests spending two nights would report provision of 30 guest nights of accommodation.

### **7.22 Occupancy rate**

This derived variable is calculated by dividing total stay unit nights occupied by total stay unit nights available in the month.

### **7.23 Average length of stay**

This derived variable is calculated by dividing total guest nights by total guest first nights (guests' arrivals). This covers generally both resident and non-resident overnight stays

### **7.24 Residence of guest**

The country or area in which the guest normally lives/resides.

### **7.25 Villas**

The word villa means different things in different parts of the World. It has evolved from its original Roman meaning of an upper-class country house to, in modern times, a specific type of detached suburban dwelling, and more specifically to vacation accommodation for the more affluent in society. Tourist Villas are designed with all the amenities needed to suit the requirements and tastes of the tourists, whether they are single, couple, or families. Business travelers also find Villas to be the perfect accommodation to spend their holidays. In addition, groups of friends and honeymooners prefer Villas as against any other type of accommodation.

### **7.26 Cottage**

This is a small vacation house often found in a village, in the countryside, in a suburb, or at the seashore.

### **7.27 Apartments**

Holiday Apartments are mainly found in big towns such as Nairobi, Mombasa, Kisumu, etc.

### **7.28 Type of accommodation facility**

In this survey, Type of accommodation facility refers to Villas, Cottages, tented camps and Apartments.

### **7.29 A stay unit**

The unit of accommodation which is available to be charged out to guests, e.g. a cottage. It can be single room, one bedroom, two bedroom, etc.

### **7.30 Total beds occupied**

A sum of all the bed-nights occupied in a facility either for a day or month irrespective of nationality. In case of a month, total beds occupied will be the summation of the daily total occupancies.

### **7.31 Total beds capacity**

The sum of all beds in the facility multiplied by the number of days in the particular month.

### **7.32 Total stay units occupied**

The sum of the stay units occupied on a daily basis for the days of the month irrespective of the number of beds/bedrooms

### **7.33 Total stay units capacity**

The sum of the all stay units on a daily basis for the days of the month irrespective of the number of beds/bedrooms

### **7.34 Full catering**

Where the facility provides catering. There is no provision for catering arrangements in the stay units

### **7.35 Self service**

Is the situation where stay units have provision for catering e.g. cooker, utensils, etc.

### **7.36 Both self and full catering**

The situation where the guest has a choice between full and self catering.

### **7.37 Intermediate consumption**

Is an economic concept used in national accounts and consists of the total monetary value of goods and services *consumed or used up as inputs in production* by enterprises, including raw materials, services and various other operating expenses. This excludes the following:

- The value of the depreciation of fixed assets.
- Valuables bought such as works of art, precious metals and stones, ornaments and jewellery.
- Major renovations, reconstructions, or enlargements of existing fixed assets enhancing their efficiency or capacity, or prolonging their expected working lives.

*It includes the following:*

- Operating expenses such as the rentals paid on the use of fixed assets leased, and also fees, commissions, royalties, etc., payable under licensing arrangements.
- The value of goods or services used as inputs into ancillary activities such as purchasing, sales, marketing, accounting, data processing, transportation, storage, maintenance, security, etc.

- The ordinary, regular maintenance and repair of fixed assets used in production.
- Expenditures on durable producer goods which are small, inexpensive and used to perform relatively simple ongoing operations.
- Expenditures on research and development, staff training, market research and similar activities.
- Rentals paid on buildings or equipment under an operating lease.

### **7.38 Compensation of employees**

A statistical term used in national accounts, to refer basically to the total gross (pre-tax) wages paid by employers to employees for work done in an accounting period, such as a quarter or a year.

### **7.39 Gross fixed capital formation**

Gross fixed capital formation is measured as the total value of a producer's acquisitions, less disposals, of fixed assets during the accounting period plus certain additions to the value of non-produced assets realised by the productive activity of institutional units. Expenditure on mineral exploration and military ware not used purely for war purposes are included in GFCF. However, intangible assets, such as copyrights, computer software etc, are not included due to unavailability of reliable data.

### **7.40 Fixed assets**

Fixed assets are tangible or intangible assets produced as outputs from processes of production that are themselves used repeatedly or continuously in other processes of production for more than one year.

### **7.41 Consumption of fixed capital**

Consumption of fixed capital constitutes the decline in the value of the fixed assets owned by an enterprise, as a result of their physical deterioration and normal rates of obsolescence and accidental damage. In other words it is the wear and tear of an asset during the accounting period.

### **7.42 Dwelling unit**

Dwelling units are structures where people live. Within a structure, there may be one or more dwellings (or housing) units. A dwelling unit is a room or group of rooms occupied by one or more households. Within a dwelling unit, there may be one or more households.

## APPENDIX 1: SURVEY QUESTIONNAIRE

### Part I

<b>CONFIDENTIAL</b>	 <b>KENYA NATIONAL BUREAU OF STATISTICS</b> <small>Kenya National Bureau of Statistics</small> <i>Kenya's Progress, Our Inspiration</i>	<b>FORM VCCA/2010/1</b>	
<b>KENYA NATIONAL BUREAU OF STATISTICS</b>			
<b>SURVEY OF VILLAS, COTTAGES, CAMPSITES AND APARTMENTS</b>			
<b>FOR OFFICIAL USE ONLY</b>			
ID CODE	RT   RC	MM/YY	
1			
Date received _____		Date Coded _____	
Date keyed _____		By _____	
<b>AUTHORITY:</b> You are required to supply the information requested in this form under the Statistics Act 2006			
<b>Type of Accommodation facility:</b> 1. VILLAS, 2. COTTAGES, 3. CAMPSITES, 4. APARTMENTS, 5. OTHER (specify) _____			
<b>Name of Establishment</b> _____		<b>District</b> _____	
<b>e-mail</b> _____		<b>Box</b> _____	
<b>Telephone</b> _____		<b>Mobile</b> _____	
<b>Total Number of Beds in all units</b> _____		<b>Total Number of Stay Units</b> _____	
<b>Month to which information on this form refers:</b> Month _____ Year _____			
<b>a) NUMBER OF BEDS OCCUPIED BY COUNTRY OF RESIDENCE (see notes at the back)</b>			
<b>BEDS OCCUPIED BY</b>	<b>PAX</b>	<b>NIGHTS</b>	
Permanent Residents			
Kenya			
Uganda			
Tanzania			
North Africa			
Central & Eastern Africa			
West Africa			
South Africa			
Other Africa			
United Kingdom			
Germany			
France			
Scandinavia			
Other Europe			
U.S.A			
Canada			
Other America			
Japan			
India			
Middle East			
China			
Other Asia			
Australia & New Zealand			
All Other Countries			
<b>TOTAL BEDS OCCUPIED</b>			
<b>TOTAL BEDS CAPACITY</b>			
<b>TOTAL STAY UNITS OCCUPIED</b>			
<b>TOTAL STAY UNITS CAPACITY</b>			
b) Type of stay unit			
Type	Rate		
One Bedroom			
Two Bedroom			
Three Bedroom			
Other			
c) Type of Catering offered (Tick appropriately)			
1. Full Catering .....			
2. Self Service .....			
3. Both Self & Full catering .....			
4. None .....			
d) If Full Catering in (c) above, give the applicable rates			
Full Board	Half Board	Bed & Breakfast	Other
e) Number of employees (full + part-time)			
i) As at the end of the month referred above			
	Citizen	Non-Citizen	
Male			
Female			
ii) How much was spent during the referred month as compensation of employees Ksh. _____			
iii) How much was spent on compensation of employees in 2009, Ksh. _____			
f) Please give this establishment's gross income from goods and services sold during the month referred above Ksh. _____			
g) Please give this establishments gross income from goods and services sold during the last financial year: Ksh. _____			
h) How much was used as intermediate consumption			
	<i>For the Month</i>	<i>For the year 2009</i>	
Ksh.		Ksh.	
<b>Filed by</b> _____	<b>Designation</b> _____	<b>Date</b> _____	

## Part II

### NOTES

#### Country Groupings

##### (i) North Africa

Algeria, Chad, Egypt, Libya, Mali, Mauritania, Mauritius, Morocco, Sahara, Spanish and Tunisia.

##### (ii) West Africa

Benin, Burkina Fasso, Cameroon, Canary Islands, Cape Verde, Cote d'ivoire, Dahomey, Equatorial Guinea, Fernando po (Macias Nguema Island), Gabon, Gambia, Ghana, Guinea Bissau, Ifri, Liberia, Niger, Nigeria, Republic of Guinea, Rio Muni, Sao Tome and Principle Islands, Senegal, Sierra Leone and Togo.

##### (iii) East and Central Africa

Angola, Burundi, Central African Republic, Congo, Djibouti, Democratic Republic of Congo, Eritrea, Ethiopia, Northern Sudan, Malawi, Mozambique, Southern Sudan, Rwanda, Somalia, Zambia and Zimbabwe.

##### (v) Other Africa

Ascension Island, Botswana, Comoro Islands, Guinea, Lesotho, Madagascar, Madeira, Namibia, Portuguese, Reunion, Seychelles Swaziland and Tristan Da Cunha.

##### (vi) United Kingdom

Channel Islands, England, Isle Man, Northern Ireland, Scotland and Wales.

##### (vii) Scandinavia

Denmark, Finland, Norway, Sweden.

##### (vii) Other Europe

Albania, Andorra, Armenia, Austria, Azores, Belarus, Belgium, Bosnia, Bulgaria, Bulgaria, Croatia, Cyprus, Czech Republic, Estonia, Faroe Island, Gibraltar, Greece, Hungary, Iceland, Latvia, Liechtenstein, Lithuania, Luxembourg, Macedonia, Malta, Moldova, Monaco, Netherlands, Poland, Portugal, Republic of Ireland, Romania, Russia Fed, San Marino, Slovakia, Slovenia, Spain, Switzerland, Ukraine, Vatican City and Yugoslavia,

##### (viii) Other America

Argentina, Bahamas, Barbados, Belize, Peru, Bermuda, Bolivia, Brazil, Cayman Island, Chile, Columbia, Costa Rica, Cuba, Dominica, Dominican Republic, Ecuador, El Salvador, Falkland Islands,

Grenada, Guatemala, Guyana, Haiti, Honduras, Jamaica, Leeward Islands, Martinique, Mexico, Nicaragua, Panama, Paraguay, Puerto Rico, St. Helena, St. Pierre, Surinam, Trinidad and Tobago, Uruguay, Venezuela and Virgin Islands,

##### (ix) Middle East

Bahrain, Cyprus, Iran, Iraq, Israel, Jordan, Kuwait, Lebanon, North Yemen, Oman, Qatar, Saudi Arabia, Syria, Turkey, United Arab Emirates and Yemen.

##### (x) Asia

Afghanistan, Azerbaijan, Bangladesh, Bhutan, Brunei, Burma, Cambodia, Georgia, Hong Kong, Indonesia, Kazakhstan, Kyrgyzstan, Laos, Macao, Malaysia, Maldives Island, Mongolia PR, Myanmar, N. Korea, Nepal, Pakistan, Philippines, S. Korea, Singapore, Sri Lanka, Taiwan, Tajikistan, Thailand, Uzbekistan and Vietnam.

##### (xi) Other Countries

Caroline Islands, Cocos Islands, Cook Islands, Fiji French, Gilbert & Alice Islands, Marshal Islands, Nauru Islands, New Caledonia, New Herbecides, Nine Islands, Norfolk Islands, Pacific Islands, Papua New Guinea, Patcairn Islands, Polynesia, Solomon Islands, Tonga, Wallis and Futuma Islands and Western Samoa.

#### Definitions

##### Permanent occupants

Means all persons from abroad and within East Africa, residing in the Hotel for one month or Longer

##### Residents of Kenya, Uganda, Tanzania etc

Means all persons ordinarily resident in these countries, irrespective of nationality. Country of Residence can be taken from the address given in the hotels Register. It should be noted that the classification by residence applies only to person(s) staying in the hotel for less than one month.

**Children** under twelve years should be excluded from the statistics unless they occupy normal adult beds.

##### Bed nights

The total number of nights spent by guests in an accommodation establishment over a given period of time. For example, a hotel with 15 guests

spending two nights would report provision of 30 bed nights of accommodation.

##### Total guest beds occupied

Sum of all the bed-nights occupied in a facility either for a day or month irrespective of nationality. In case of a month, total beds occupied will be the summation of the daily total occupancies.

##### Total guest beds available

Sum of all beds in the facility multiplied by the number of days in the particular month.

##### Total guest bedrooms occupied

Sum of the bedrooms occupied on a daily basis for the days of the month irrespective of the number of beds/bedrooms

##### Total guest bedrooms available

Sum of the all bedrooms on a daily basis for the days of the month irrespective of the number of beds/bedrooms

##### Full catering

Where the facility provides catering. There is no provision for catering arrangements in the bedrooms.

##### Self service

Is the situation where bedrooms have provision for catering eg cooker, utensils, etc.

##### Both self and full catering

Is the situation where the guest has a choice between full and self catering.

#### Enquiries

*Should you have questions regarding the completion of the questionnaire, please call us on telephone: +254-20-17583/6/8, 317612/22/23/51, Fax: +254-20-315977, or send email to: [directorgeneral@knbs.or.ke](mailto:directorgeneral@knbs.or.ke), visit our website: [www.knbs.or.ke](http://www.knbs.or.ke) or contact the nearest District Statistics Office.*