Tourism Sector Performance Report - 2018

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CS, Tourism and Wildlife
This report gives overall performance of Kenya’s tourism sector in 2018 highlighting mainly:

- International tourist arrivals,
- Domestic tourism performance
- Tourism receipts.
International Visitor Arrivals

Visitor arrivals - 2018
2,025,206

Visitor arrivals - 2017
1,474,671

37.33% GROWTH

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Tourism Receipts

2017
119,900,000,000/-

31.26% Growth

2018
157,386,151,000/-
Domestic Tourism

Domestic Bednights
2018 Estimates

3,974,243

9.03% Increase

Domestic Bednights
2017 Estimates

3,645,144

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## Top 30 Source Markets

<table>
<thead>
<tr>
<th>Country</th>
<th>Visits</th>
<th>% of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>225,157</td>
<td>11.12%</td>
</tr>
<tr>
<td>TZ</td>
<td>212,216</td>
<td>10.48%</td>
</tr>
<tr>
<td>UG</td>
<td>204,082</td>
<td>10.08%</td>
</tr>
<tr>
<td>UK</td>
<td>184,002</td>
<td>9.09%</td>
</tr>
<tr>
<td>INDIA</td>
<td>125,032</td>
<td>6.17%</td>
</tr>
<tr>
<td>CHINA</td>
<td>81,709</td>
<td>4.03%</td>
</tr>
<tr>
<td>GERMANY</td>
<td>78,388</td>
<td>3.87%</td>
</tr>
<tr>
<td>ITALY</td>
<td>65,134</td>
<td>3.22%</td>
</tr>
<tr>
<td>SA</td>
<td>49,993</td>
<td>2.47%</td>
</tr>
<tr>
<td>FRANCE</td>
<td>48,189</td>
<td>2.37%</td>
</tr>
<tr>
<td>CANADA</td>
<td>41,859</td>
<td>2.07%</td>
</tr>
<tr>
<td>ETHIOPIA</td>
<td>40,322</td>
<td>1.99%</td>
</tr>
<tr>
<td>NLD</td>
<td>37,703</td>
<td>1.86%</td>
</tr>
<tr>
<td>NIGERIA</td>
<td>35,552</td>
<td>1.76%</td>
</tr>
<tr>
<td>RWANDA</td>
<td>34,758</td>
<td>1.72%</td>
</tr>
<tr>
<td>SOMALIA</td>
<td>34,317</td>
<td>1.69%</td>
</tr>
<tr>
<td>BURUNDI</td>
<td>27,680</td>
<td>1.37%</td>
</tr>
<tr>
<td>AUS</td>
<td>27,656</td>
<td>1.36%</td>
</tr>
<tr>
<td>SPAIN</td>
<td>25,027</td>
<td>1.24%</td>
</tr>
<tr>
<td>SWEDEN</td>
<td>22,028</td>
<td>1.09%</td>
</tr>
<tr>
<td>S. SUDAN</td>
<td>20,383</td>
<td>1.01%</td>
</tr>
<tr>
<td>DRC</td>
<td>19,780</td>
<td>0.98%</td>
</tr>
<tr>
<td>NORWAY</td>
<td>15,428</td>
<td>0.76%</td>
</tr>
<tr>
<td>ZIM</td>
<td>15,357</td>
<td>0.75%</td>
</tr>
<tr>
<td>POLAND</td>
<td>15,163</td>
<td>0.74%</td>
</tr>
<tr>
<td>DENMARK</td>
<td>14,875</td>
<td>0.73%</td>
</tr>
<tr>
<td>SWITZ</td>
<td>13,688</td>
<td>0.68%</td>
</tr>
<tr>
<td>S. KOREA</td>
<td>13,557</td>
<td>0.67%</td>
</tr>
<tr>
<td>BELGIUM</td>
<td>13,481</td>
<td>0.66%</td>
</tr>
<tr>
<td>JAPAN</td>
<td>12,981</td>
<td>0.64%</td>
</tr>
</tbody>
</table>
# Arrival Statistics by Point of Entry

## AIRPORTS

<table>
<thead>
<tr>
<th></th>
<th>JAN</th>
<th>FEB</th>
<th>MAR</th>
<th>APR</th>
<th>MAY</th>
<th>JUN</th>
<th>JUL</th>
<th>AUG</th>
<th>SEP</th>
<th>OCT</th>
<th>NOV</th>
<th>DEC</th>
</tr>
</thead>
<tbody>
<tr>
<td>JKIA</td>
<td>105,262</td>
<td>98,532</td>
<td>100,441</td>
<td>94,236</td>
<td>93,730</td>
<td>114,097</td>
<td>141,763</td>
<td>145,231</td>
<td>114,539</td>
<td>115,597</td>
<td>103,229</td>
<td>115,856</td>
</tr>
<tr>
<td>MIAM</td>
<td>14,533</td>
<td>12,792</td>
<td>11,024</td>
<td>5,205</td>
<td>4,735</td>
<td>5,157</td>
<td>9,025</td>
<td>9,589</td>
<td>9,916</td>
<td>9,343</td>
<td>8,391</td>
<td>18,403</td>
</tr>
<tr>
<td>Others</td>
<td>2,040</td>
<td>2,538</td>
<td>2,162</td>
<td>2,333</td>
<td>2,021</td>
<td>2,271</td>
<td>3,242</td>
<td>3,210</td>
<td>3,294</td>
<td>2,317</td>
<td>2,337</td>
<td>1,718</td>
</tr>
</tbody>
</table>

## OTHER ENTRY POINTS

<table>
<thead>
<tr>
<th></th>
<th>JAN</th>
<th>FEB</th>
<th>MAR</th>
<th>APR</th>
<th>MAY</th>
<th>JUN</th>
<th>JUL</th>
<th>AUG</th>
<th>SEP</th>
<th>OCT</th>
<th>NOV</th>
<th>DEC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monthly</td>
<td>48,846</td>
<td>37,645</td>
<td>41,639</td>
<td>41,426</td>
<td>42,185</td>
<td>42,932</td>
<td>50,591</td>
<td>52,313</td>
<td>44,572</td>
<td>42,844</td>
<td>40,899</td>
<td>49,090</td>
</tr>
<tr>
<td>Totals</td>
<td>170,681</td>
<td>151,507</td>
<td>155,266</td>
<td>143,205</td>
<td>142,681</td>
<td>164,457</td>
<td>204,621</td>
<td>210,343</td>
<td>172,421</td>
<td>170,101</td>
<td>154,856</td>
<td>185,067</td>
</tr>
</tbody>
</table>

Visitor arrivals for the year 2018 are at 2,025,206
Totals Per Point of Entry

2007

- JKIA: 771,497
- MIAM: 276,316

2018

- JKIA: 1,342,513
- MIAM: 118,113
- OTHER AIRPORTS: 29,488
- OTHER ENTRANCE POINTS: 535,092

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Purpose of Visit

- **Holiday**: 73.9% of the total arrivals.
- **Visiting Friends & Relatives**: 6.7% of the total arrivals.
- **Business & Conference**: 13.3% of the total arrivals.
- **Other purposes**: 6.4% of the total arrivals.
Overview of Performance - 2011 to 2018

- 2007: 1,816,800
- 2011: 1,822,885
- 2015: 1,180,500
- 2017: 1,474,671
- 2018: 2,025,206

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Drivers for Tourism Growth in 2018

Kenya’s tourism performance for the year 2018 has seen a substantial improvement compared to 2017 in both tourism arrivals, domestic tourism performance and earnings. This can be attributed to the following factors:
Drivers for Tourism Growth in 2018: Political Stability
Drivers for Tourism Growth in 2018: | 2 of 8

**Improved security situation**
• Government investment in security.

• Improvement of security situation in Somalia reducing threat on Kenya
Drivers for Tourism Growth in 2018: | 3 of 8

Growth in the aviation sector
• Improvement of services at JKIA.
• Direct flights Nairobi - New York
• Air France made a comeback flying 3 times per week
• Tui Fly charter airline started flying from Netherlands & Belgium to MIAM
• Qatar Airways Doha - Mombasa
Drivers for Tourism Growth in 2018: | 4 of 8

Investor confidence

www.tourism.go.ke
• Kenya improved from No. 92 to No. 80 in ease of doing business. – World Bank

• Kenya has a total of 68 global hotel brands. - Knight Frank 2018

• Nairobi ranked 3rd on the continent after Lagos and Abuja in the hotel pipeline report.
Withdrawal of Travel Advisories
USA lifted their blanket travel

UK similarly has only highlighted some locations that its citizens should not visit.
Visits by Foreign Dignitaries
• There were several prominent visitors in 2018
Drivers for Tourism Growth in 2018: 7 of 9

Open border policy
• The open border policy for Africans - visa on arrival
Drivers for Tourism Growth in 2018: 8 of 9

Revitalised marketing efforts

Live the Magic Campaign

 Ministry of Tourism & Wildlife

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• Branding partnership with Kenya
• Partnership with Kenya Railways (KR)
• Branding of Equator crossing points
• Digital marketing
• Global Campaigns
Drivers for Tourism Growth in 2018: 9 of 9

Hosting of International Conferences

79th SKAL World Congress
17th - 21st October, 2018

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• 1st ordinary session of the African Union Ministerial Sub-Committee on Tourism

• 79th International World SKAL Congress

• Sustainable Blue Economy Conference

• Africa Hotel Investment Forum (AHIF)
Some notable trends will shape destination Kenya’s performance in 2019 and the sector needs take note. These include:
Trends that will drive Tourism in Kenya in 2019:

**Growth in Shared Economy**

- According to a report by Airbnb, since it’s founding **3.5 million** guests have arrived at listings across Africa.

- In Kenya guest arrivals have grown by **68%**.
Trends that will drive Tourism in Kenya in 2019:

**Africa Open Skies**

- The Single Africa Air Transport Market (SAATM)
- 2018 arrival figures already show marked growth in arrivals from other African countries.
Budget (2017/2018) Vs 2018 Receipts

Budget - 2016/2017
8,026,470,000

Total Tourism Receipts
157,386,151,000