

K E N Y A

TOURISM SECTOR

P E R F O R M A N C E R E P O R T

2019

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Ministry of Tourism
& Wildlife



Tourism Research Institute





This report gives overall performance of Kenya's tourism sector in 2019 highlighting mainly:

- International tourist arrivals,
- International Arrivals Receipts
- Domestic tourism performance
- Drivers of Tourism Growth in 2019
- Global Tourism Performance in 2019
- Tourism Trends for 2020 and Beyond



METHODOLOGY

International Arrivals Data

The basic source of data for international tourist arrivals is the Department for Immigration and Border Management captured through the PISCES software (Personal Identification Secure Comparison and Evaluation System).

International Tourist Receipts/Visitor Exports

"Data on receipts and expenditure related to international tourism are generally gathered in the framework of the Balance of Payments under the items 'Services, Travel, Credit and Debit' (International Tourism Receipts and Expenditure)" UNWTO.

Domestic Tourism

This is reported by way of domestic bednights. Data on this is obtained from tourist accommodation facilities collaboratively with Kenya National Bureau of Statistics.

INTERNATIONAL VISITORS ARRIVALS | 1 OF 4

JANUARY			FEBRUARY			MARCH		
2019		2018	2019		2018	2019		2018
JKIA	113,050	105,262	JKIA	106,198	98,532	JKIA	93,571	100,441
MIA	15,740	14,533	MIA	12,761	12,792	MIA	20,159	11,024
OTHER AIRPORTS	1,234	2,040	OTHER AIRPORTS	1,477	2,538	OTHER AIRPORTS	1,399	2,162
OTHER ENTRIES	43,280	48,846	OTHER ENTRIES	32,399	37,645	OTHER ENTRIES	32,170	41,639
TOTAL	173,305	170,681	TOTAL	152,835	151,507	TOTAL	147,300	155,266
APRIL			MAY			JUNE		
2019		2018	2019		2018	2019		2018
JKIA	103,522	94,236	JKIA	98,596	93,730	JKIA	122,122	114,097
MIA	4,769	5,205	MIA	3,591	4,735	MIA	6,650	5,157
OTHER AIRPORTS	708	2,338	OTHER AIRPORTS	3,442	2,021	OTHER AIRPORTS	4,541	2,271
OTHER ENTRIES	37,260	41,426	OTHER ENTRIES	33,909	42,195	OTHER ENTRIES	33,379	42,932
TOTAL	146,258	143,205	TOTAL	139,538	142,681	TOTAL	166,692	164,457

INTERNATIONAL VISITORS ARRIVALS | 2 of 4

JULY			AUGUST			SEPTEMBER		
2019		2018	2019		2018	2019		2018
JKIA	149,994	141,763	JKIA	148,816	145,231	JKIA	121,668	114,539
MIA	8,520	9,025	MIA	10,988	9,589	MIA	9,199	9,916
OTHER AIRPORTS	5,304	3,242	OTHER AIRPORTS	6,145	3,210	OTHER AIRPORTS	1,076	3,294
OTHER ENTRIES	42,522	50,591	OTHER ENTRIES	47,642	52,313	OTHER ENTRIES	37,631	44,672
TOTAL	206,340	204,621	TOTAL	213,591	210,343	TOTAL	169,574	172,421

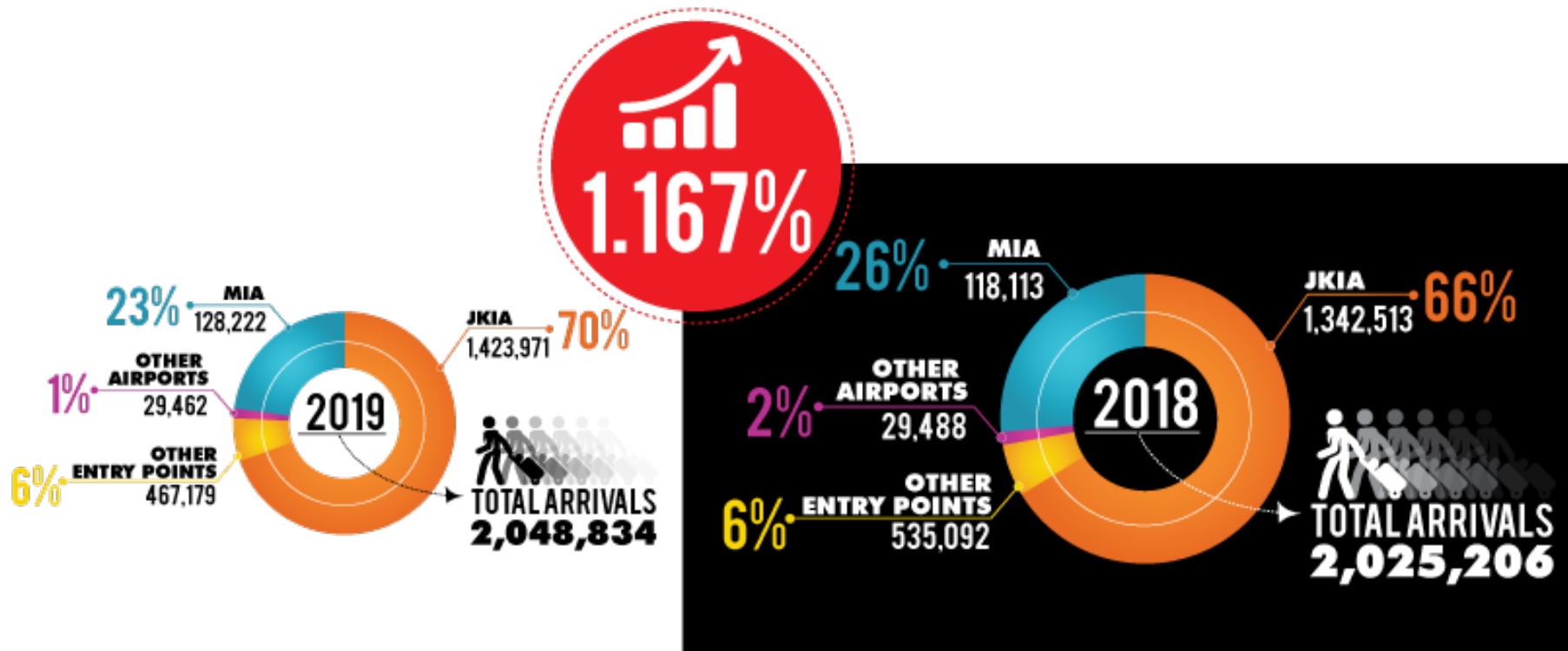
OCTOBER			NOVEMBER			DECEMBER		
2019		2018	2019		2018	2019		2018
JKIA	138,033	115,597	JKIA	108,755	103,229	JKIA	119,646	115,856
MIA	11,157	9,343	MIA	12,315	8,391	MIA	12,373	18,403
OTHER AIRPORTS	2,767	2,317	OTHER AIRPORTS	703	2,337	OTHER AIRPORTS	666	1,718
OTHER ENTRIES	51,161	42,844	OTHER ENTRIES	32,480	40,899	OTHER ENTRIES	43,346	49,090
TOTAL	203,117	170,101	TOTAL	154,253	154,856	TOTAL	176,031	185,067

International Visitors Arrivals | 3 of 3



International Visitors Arrivals | 3 of 4

International arrivals for 2019 by points of entry in comparison with 2018

























Entry through Jomo Kenyatta International Airport and Moi International Airport registered substantial growth of 6.07% and 8.56% respectively compared with the overall growth of 1.167%.

The other entry points registered a decline most significantly the land borders at -12.69%.

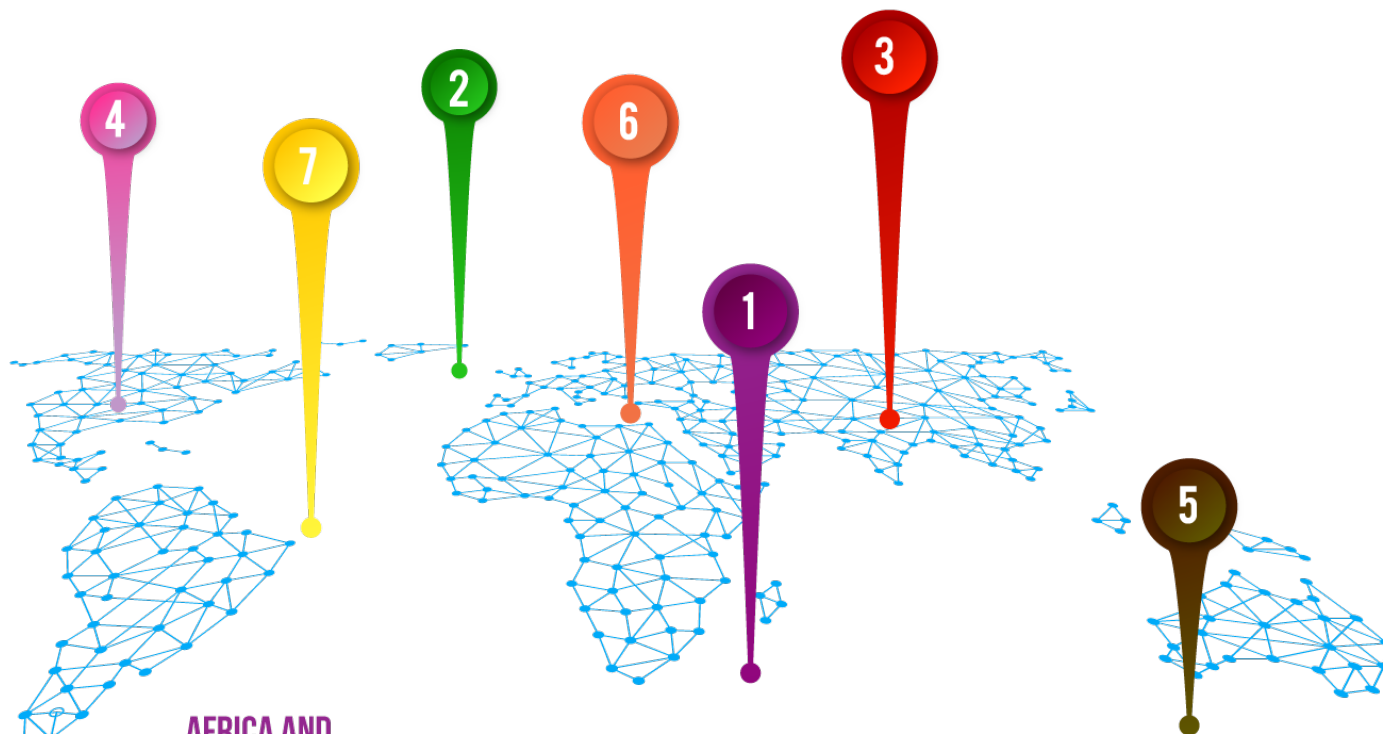
This is an indication that air connectivity will continue to be a major driver for growth of international arrivals.

TOP 20 SOURCE MARKETS FOR 2019 IN COMPARISON WITH 2018

	USA 	UG 	TZ 	UK 	INDIA 	CHINA 	GERMANY 	FRANCE 	ITALY 	SA 
	1	2	3	4	5	6	7	8	9	10
2019 Arrivals	245,437	223,010	193,740	181,484	122,649	84,208	73,150	54,979	54,607	46,926
2018 Arrivals	225,157	212,216	204,082	184,002	125,032	81,709	78,388	48,189	65,134	49,993
Variation	20,280	10,794	-10,342	-2,518	-2,383	2,499	-5,238	6,790	-10,527	-3,067
% Change	9.007%	5.086%	-5.068%	-1.368%	-1.906%	3.058%	-6.682%	14.090%	-16.162%	-6.135%

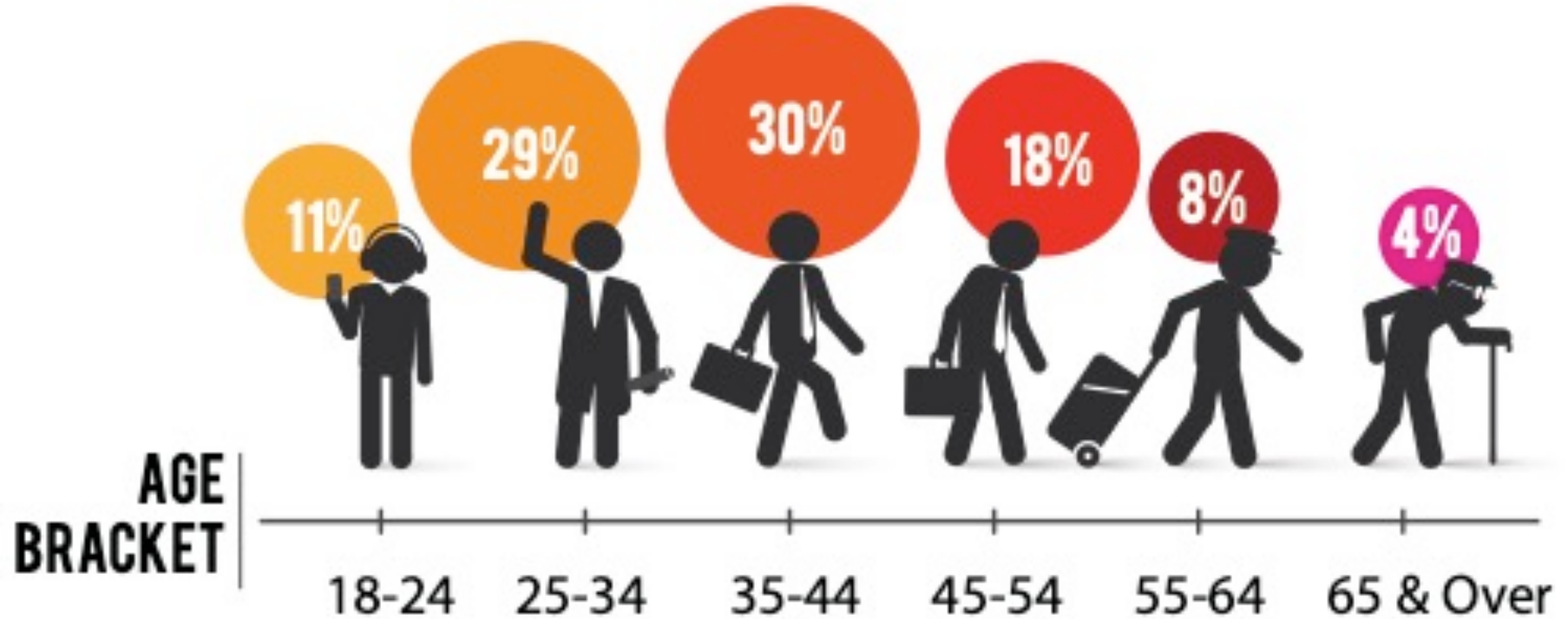
	RWANDA 	CANADA 	ETHIOPIA 	NLD 	NIGERIA 	SOMALIA 	BURUNDI 	AUS 	SPAIN 	S. SUDAN 
	11	12	13	14	15	16	17	18	19	20
2019 Arrivals	43,321	41,039	40,220	37,266	32,906	32,268	31,218	27,867	26,398	24,646
2018 Arrivals	34,758	41,859	40,322	37,703	35,552	34,317	27,680	27,656	25,027	20,383
Variation	8,563	-820	-102	-437	-2,646	-2,049	3,538	211	1,371	4,263
% Change	24.636%	-1.959%	-0.253%	-1.159%	-7.443%	-5.971%	12.782%	0.763%	5.478%	20.914%

REGIONAL RANKING OF SOURCE MARKETS FOR 2019 IN COMPARISON WITH 2018



REGION	AFRICA AND INDIAN OCEAN	EUROPE	ASIA	AMERICAS	OCEANIA	MIDDLE EAST	OTHERS	TOTAL
2019	823,990	584,434	270,205	305,701	33,110	19,095	12,299	2,048,834
2018	825,489	611,969	282,624	247,530	35,231	20,648	1,7156	2,025,206
% CHANGE	-0.182%	-4.499%	-4.394%	23.501%	-6.020%	-7.521%	17.143%	1.167%

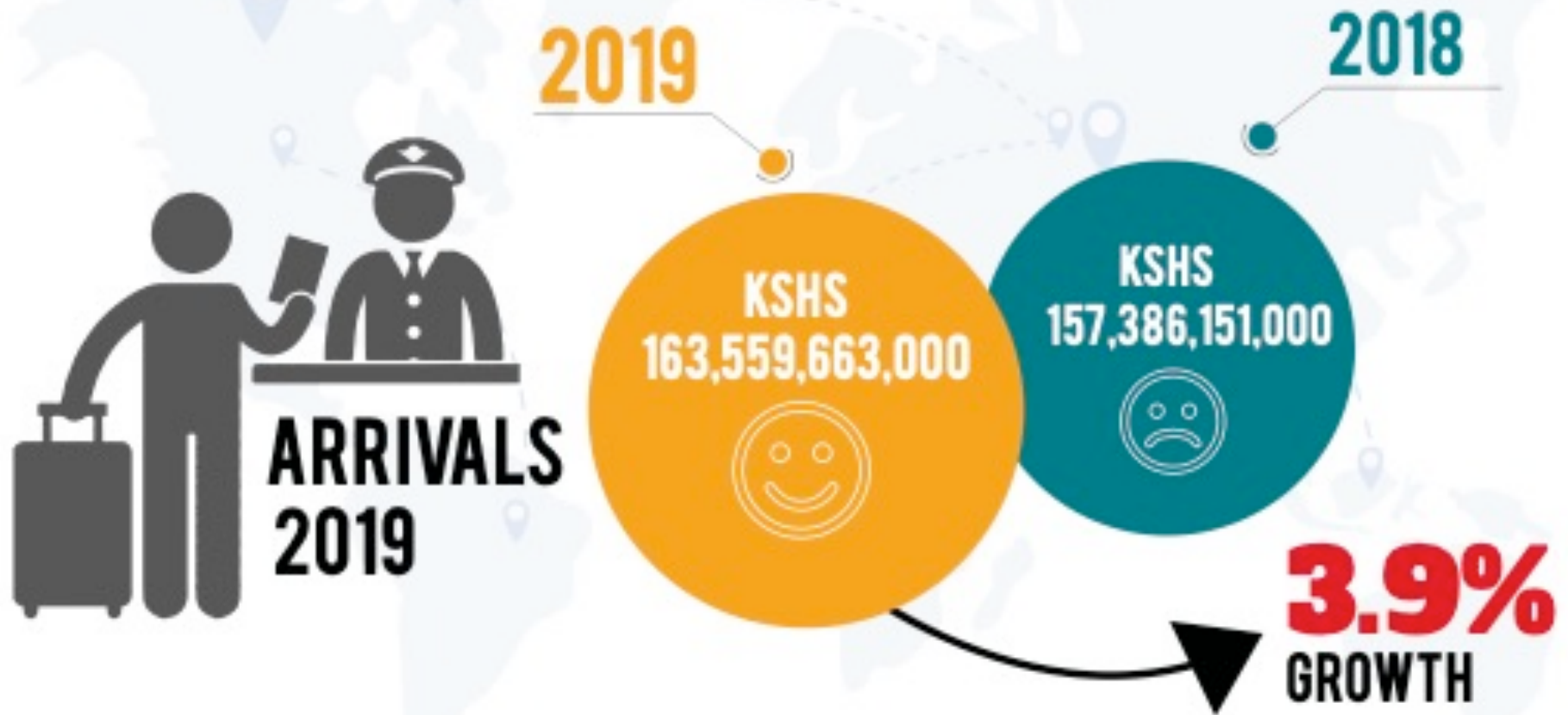
INTERNATIONAL ARRIVALS BY AGES



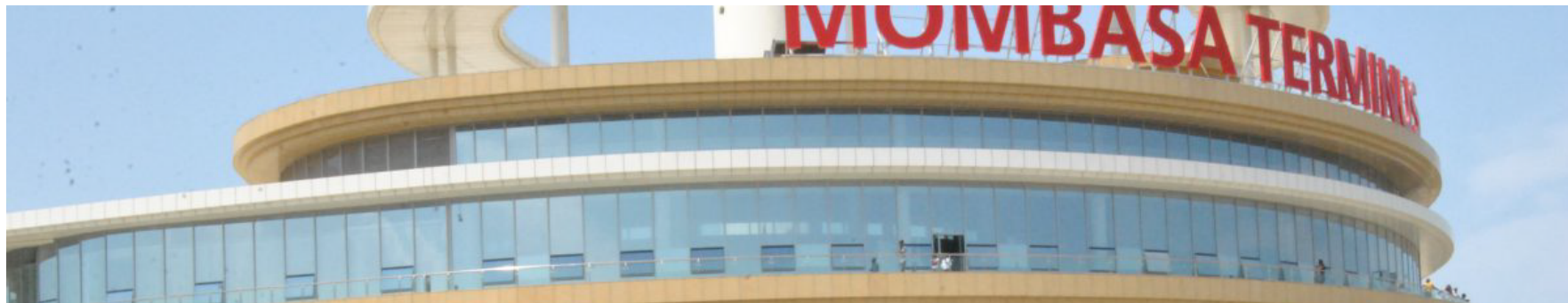
INTERNATIONAL ARRIVALS BY PURPOSES OF VISIT



INTERNATIONAL ARRIVALS RECEIPTS

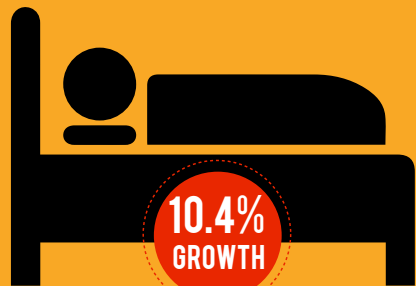


DOMESTIC TOURISM



4,955,800

BEDNIGHTS - 2019



4,489,000

BEDNIGHTS - 2018



DRIVERS OF TOURISM GROWTH IN 2019 | 1 of 5

- Global Online consumer campaigns on Google, Online Travel agencies such as Travel Zoo, on Aljazeera and CNN Online and Continuous Digital consumer advertising campaigns on Expedia and Tripadvisor and on social media and Google search.
 - Joint marketing campaigns with travel trade associations such as APTA, SATOA, ATTA, in key markets.
 - Travel trade road shows in the UK, India, USA and China markets showcasing experiences and services by the private sector players.
- Global travel trade exhibitions including MKTE in Nairobi, ITB Berlin, ITB Asia in Singapore, WTM London, WTM Africa in Cape Town, OTM in India, and USTOA, USA.
 - Domestic Campaigns themed ***“TembeaKenyaNaMimi”*** through TV, digital platforms and radio.
 - Destination profiling events for global PR campaign to leverage on positives around the destination e.g Kenya Golf Open, NY Marathon and Ineos 1:59 Challenge.
 - Refreshed brand – ***“EmbraceMoreMagic”***



**MARKETING
EFFORTS**

DRIVERS OF TOURISM GROWTH IN 2019 | 2 of 5

Positive developments on this front in 2019 include the following:

- After resuming flights between Paris and Nairobi in 2018, Air France in March 2019 increased its flights frequency from three to five weekly. The French market has also seen growth as others like UK decline.
- Qatar Airways started direct flights from Doha to Mombasa in December 2018. This was expected to serve various markets, Doha being a major connection hub.
- Ethiopian Airlines increased flights frequency to Mombasa from one to two daily in the year.
- TUI and Neos increased their charter flights to Moi International Airport further boosting arrivals to via MIA.
- The commencement of direct flights between Nairobi and New York by Kenya Airways in October 2018 has contributed to the sustained growth of the American market.



**GROWTH IN
THE AVIATION
SECTOR**

DRIVERS OF TOURISM GROWTH IN 2019 | 3 of 5



**POLITICAL
STABILITY**



The country experienced continued political stability throughout the year. The tourism environment has enjoyed the stability and consequently contributed to the recorded growth.

DRIVERS OF TOURISM GROWTH IN 2019 | 4 of 5



The security situation remained stable in the year with sustained investment in the same by the Government. Only one terrorist attack, the Dusit2 early in the year directly affected tourism.



**SECURITY
SITUATION**

DRIVERS OF TOURISM GROWTH IN 2019 | 5 of 5

The latest World Bank Ease of Doing Business report shows that in 2019, Kenya improved five positions to 56 globally on attractiveness to investors up from 61 in 2018.

This has been pegged on among others, automation of systems that have made starting business in Kenya easy and a commitment by the Government to continue adopting a robust regulatory framework and improve the business environment.



**EASE OF DOING
BUSINESS AND
INVESTOR
CONFIDENCE**

The recorded growth was however slower than targeted and this can be attributed to factors key among them being:



- Dusit d2 terrorist attack in January 2019 and subsequently reinstatement of some travel alerts where advisories had been lifted in 2018.
- The financial years 2018/19 and 2019/20 saw a decline in budgetary resources available for tourism development and marketing.
- Generally slowed down growth globally. UNWTO reported that tourism in Sub-Saharan Africa overall was growing at 1% up to September of that year and globally, the rate of growth slowed down from 6% in 2018 to 4%.

GLOBAL TOURISM PERFORMANCE IN 2019



INTERNATIONAL ARRIVALS GLOBALLY

International tourist arrivals grew 4% in January-September 2019 compared to 6% growth recorded in 2018, which is in line with the annual average of 4% of the last ten years (2008-2018). North Africa grew by 10% while Sub-Saharan Africa grew by 1% which is comparable to the growth in destination Kenya. (UNWTO)



GLOBAL AVIATION TRENDS

European carriers showed a strong turnaround in 2019 driven by higher cash flow generation from operating activities. In Africa and Middle East, passenger traffic grew by 9.9% year-on-year. The Americas recorded a 2.4% decline in air passenger volumes fuelled by increasing uncertainty in the socio-economic and political backdrop in some of the region's key economies. (IATA)



GLOBAL TOURISM RECEIPTS

According to UNWTO Tourism Barometer, data reported by 127 world destinations for January-September 2019 point to an increase in international tourism receipts across most regions. 78% (99 destinations) saw an increase in international tourism earnings compared to the same period last year, while 22% experienced a decrease.

TOURISM TRENDS FOR 2020 AND BEYOND | 1 of 8

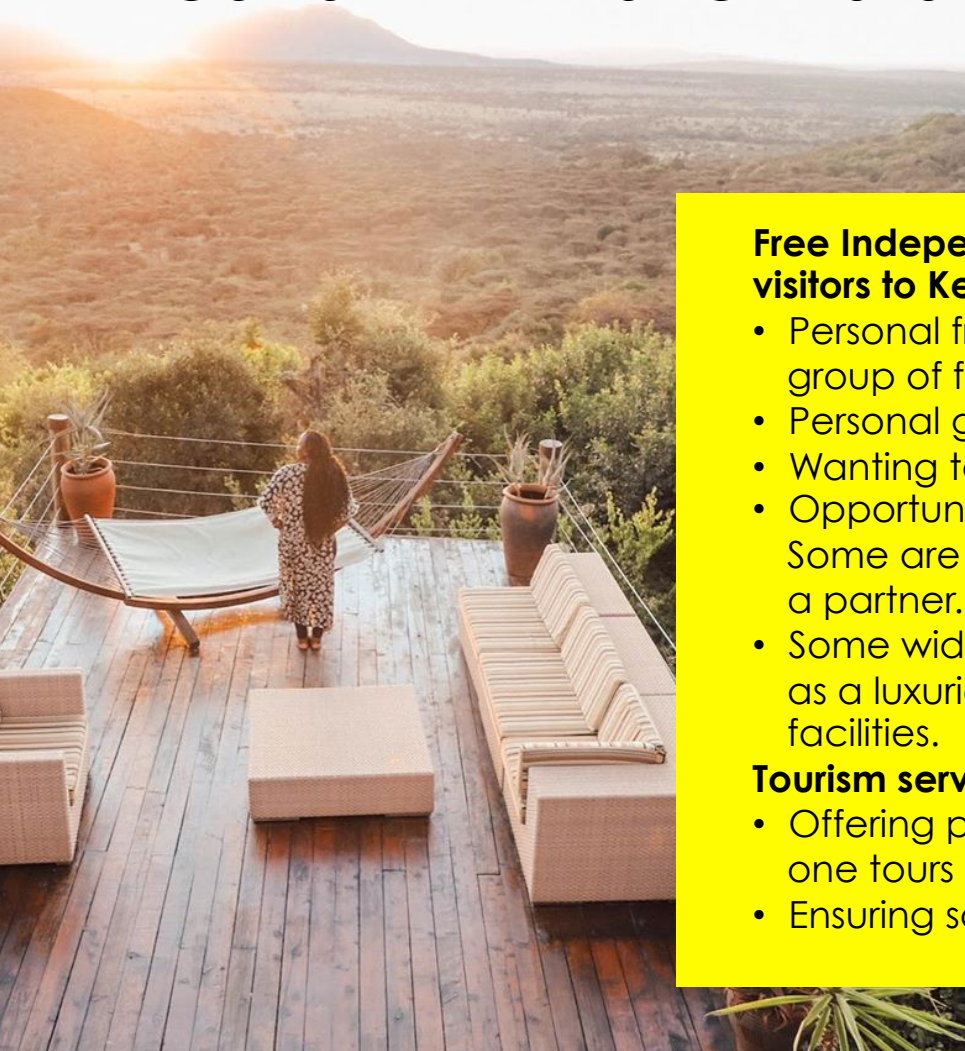
Growth of Free Independent Travel

Free Independent Travel accounts for 36.1% of international visitors to Kenya. It is gaining popularity due to:

- Personal freedom as opposed to being "tied down" to a group of friends, family or partner.
- Personal growth from solo adventure experience.
- Wanting to maximize "me-time."
- Opportunity to meet new people and often make friends. Some are young singles looking for social activities or to find a partner.
- Some widowed seniors use long-term hotel stays or cruises as a luxurious alternative to conventional elderly care facilities.

Tourism service providers should maximise this potential by:

- Offering packages like professional, personalized one-on-one tours
- Ensuring safety, trustworthiness and destination reliability.



TOURISM TRENDS FOR 2020 AND BEYOND | 2 of 8



Increased Concern for Value for Money

This is fuelled by various factors including:

- Last-minute offers on the internet.
- An array of price comparison tools at travellers' disposal.
- Reading former guests online reviews.


It has resulted in a maximizing type of traveller. There is more sensitivity to value for money and destinations' price rating.



tripadvisor®

TOURISM TRENDS FOR 2020 AND BEYOND | 3 of 8

Search for Novel Experiences

A photograph of a person surfing on a pink surfboard, riding a wave. The surfer is wearing a dark wetsuit and is captured in a dynamic pose, leaning back with one arm extended. The water is a vibrant blue-green, and the sky is a clear, deep blue. The surfboard is a bright pink color, contrasting with the blue water.

27% of holidaymakers are seeking to visit a new destination/country and almost a third (32%) are expecting to visit a new resort or city with more seeking for adventure" (ABTA).

TOURISM TRENDS FOR 2020 AND BEYOND | 4 of 8



Food as a Key Element of Tourists' Experience

Gastronomy is increasingly becoming a central part of the tourist's experience as opposed to being a supporting experience. There is need for innovation in gastronomy, offer organic & special diets and observe high levels of hygiene.

TOURISM TRENDS FOR 2020 AND BEYOND | 5 of 8

Search for Genuine, Authentic Tourism Experiences



Tourists want flexibility where they can book products while at the destination as opposed to rigid predetermined packages. From enjoying local cuisine to celebrating regional festivals and holidays, local experiences are set to become some of the top tourist trends to watch. The more closely an experience can be tailored to a client's desires and expectations, the more likely they are to return and to use the same service again.

TOURISM TRENDS FOR 2020 AND BEYOND | 6 of 8



Convenience Through Technology, Artificial Intelligence and Automation

AI is revolutionising travel and tourism (eye-catching example is Connie, the Hilton Hotel chain's robot concierge). Many customers now book their travel and accommodation with the help of internet chatbots which can handle queries and assist with information, reduce traffic and provide real-time feedback.

TOURISM TRENDS FOR 2020 AND BEYOND | 7 of 8

Accessible Tourism

To include people with physical and intellectual disabilities
Accessible tourism looks beyond the number of people with physical and intellectual disabilities, to encompass all those with mobility needs — including seniors and babies across the human lifecycle.



TOURISM TRENDS FOR 2020 AND BEYOND | 8 of 8

Shortening The Booking Window

The drive towards an omni channel presence is directing influencers from social media into the tour operator space, leveraging their communities to launch tours that are curated and more personalised. Examples is the Instagram-only app called Six Travel, where you can book hotels directly on Instagram from influencers' stories or via a link in their bio.



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