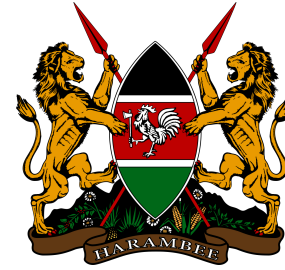


Tourism Sector Performance Report - 2018

Hon. Najib Balala, EGH
CS, Tourism and Wildlife



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www.MagicalKenya.com



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



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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

USA	TZ	UG	UK	INDIA	CHINA	GERMANY	ITALY	SA	FRANCE
									
225,157	212,216	204,082	184,002	125,032	81,709	78,388	65,134	49,993	48,189
11.12%	10.48%	10.08%	9.09%	6.17%	4.03%	3.87%	3.22%	2.47%	2.37%

CANADA	ETHIOPIA	NLD	NIGERIA	RWANDA	SOMALIA	BURUNDI	AUS	SPAIN	SWEDEN
									
41,859	40,322	37,703	35,552	34,758	34,317	27,680	27,656	25,027	22,028
2.07%	1.99%	1.86%	1.76%	1.72%	1.69%	1.37%	1.36%	1.24%	1.09%

S. SUDAN	DRC	NORWAY	ZIM	POLAND	DENMARK	SWITZ	S. KOREA	BELGIUM	JAPAN
									
20,383	19,780	15,428	15,357	15,163	14,875	13,688	13,557	13,481	12,981
1.01%	0.98%	0.76%	0.75%	0.74%	0.73%	0.68	0.67	0.66%	0.64%

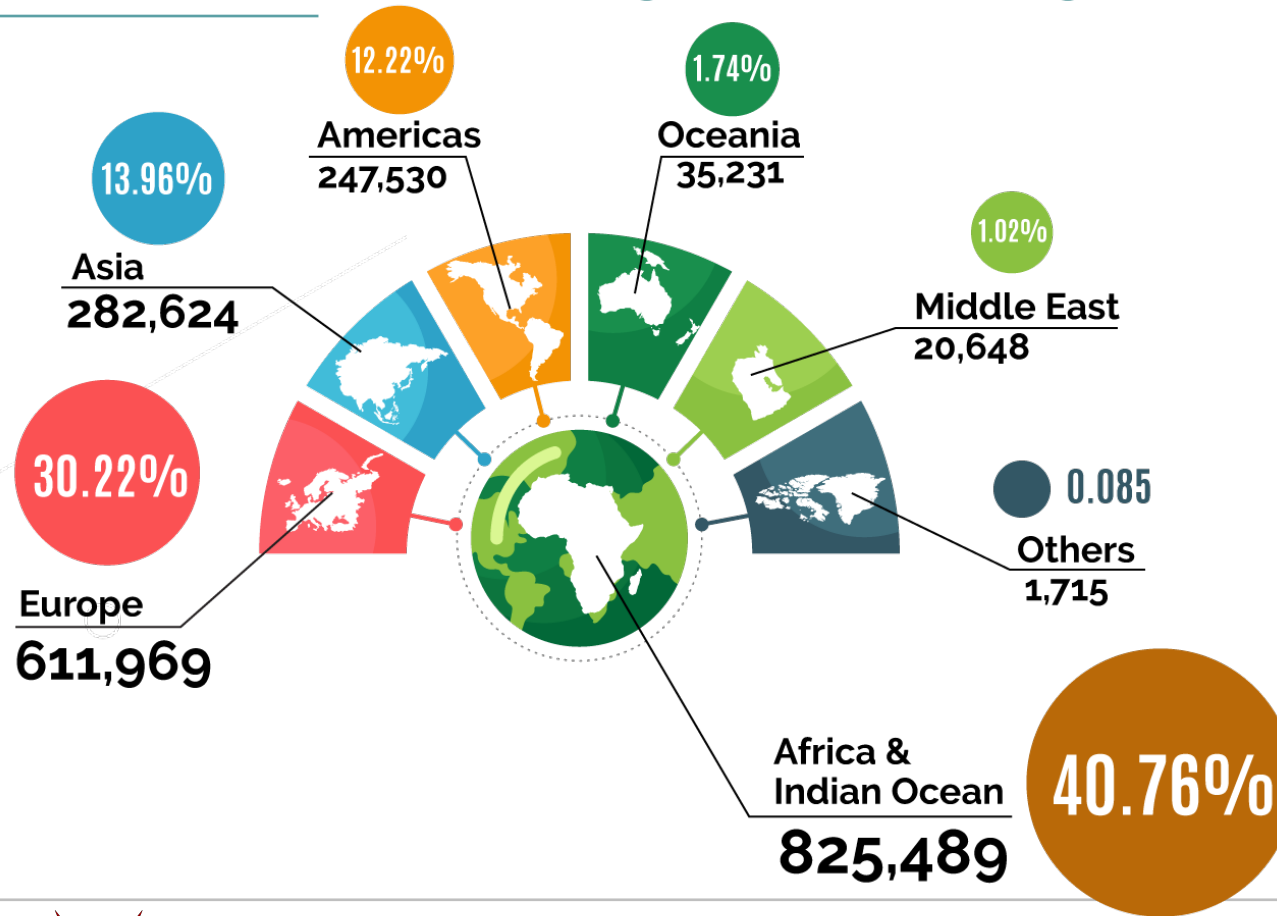


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Source Market by Regional Ranking



Arrival Statistics by Point of Entry

AIRPORTS

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
JKIA	105,262	98,532	100,441	94,236	93,730	114,097	141,763	145,231	114,539	115,597	103,229	115,856
MIAM	14,533	12,792	11,024	5,205	4,735	5,157	9,025	9,589	9,916	9,343	8,391	18,403
Others	2,040	2,538	2,162	2,338	2,021	2,271	3,242	3,210	3,294	2,317	2,337	1,718

OTHER ENTRY POINTS

	48,846	37,645	41,639	41,426	42,195	42,932	50,591	52,313	44,672	42,844	40,899	49,090
MONTHLY TOTALS	170,681	151,507	155,266	143,205	142,681	164,457	204,621	210,343	172,421	170,101	154,856	185,067



Visitor arrivals for the year 2018 are at

2,025,206

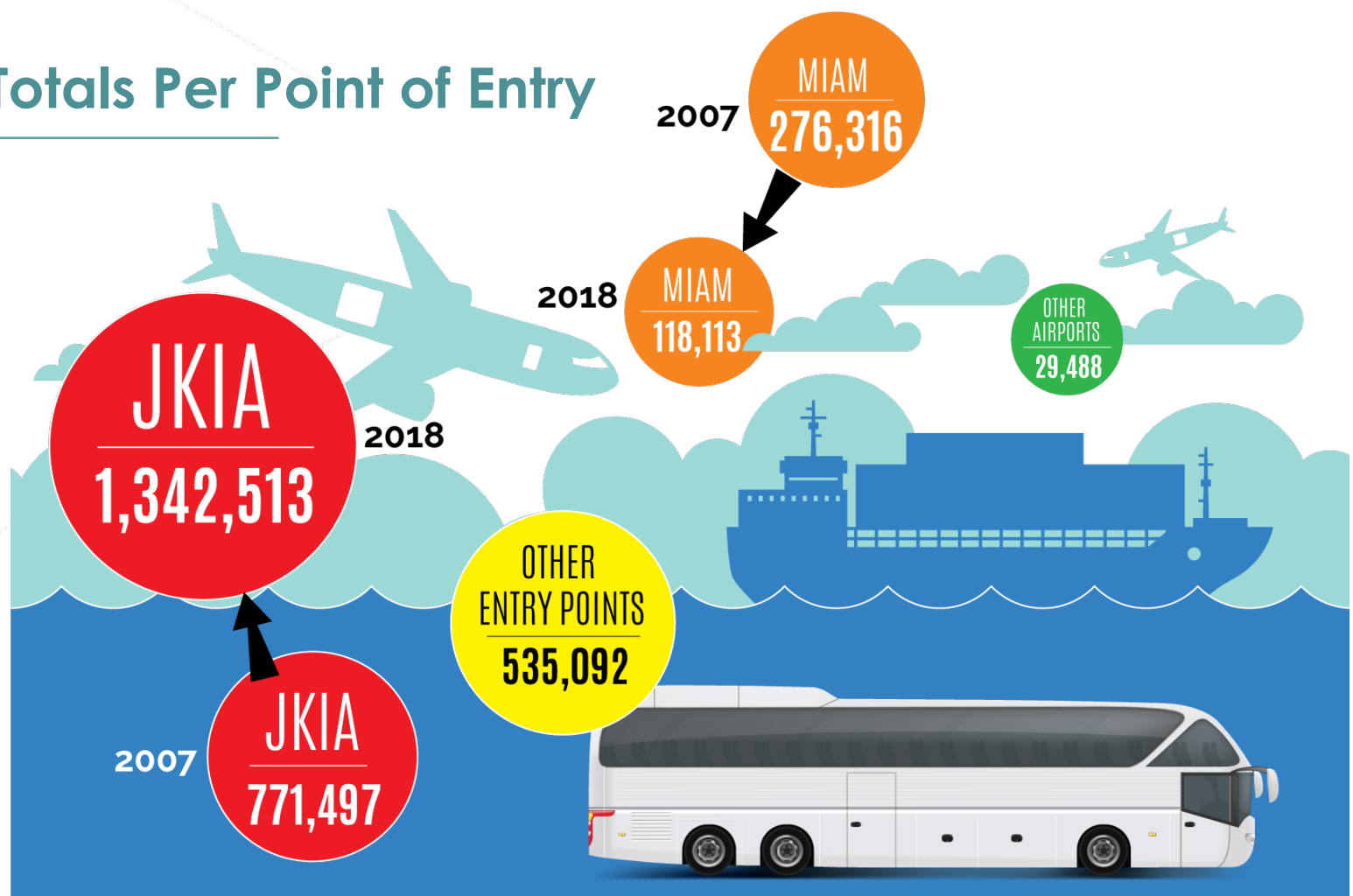


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Totals Per Point of Entry

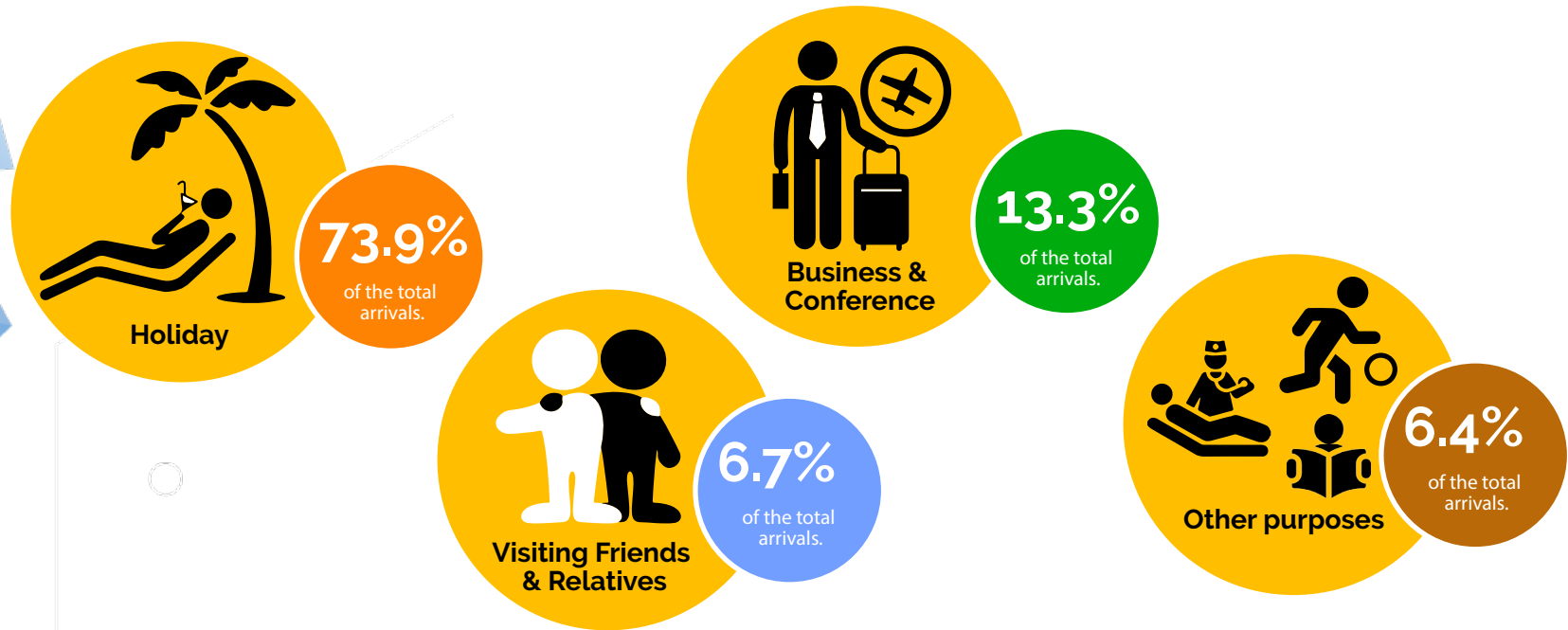


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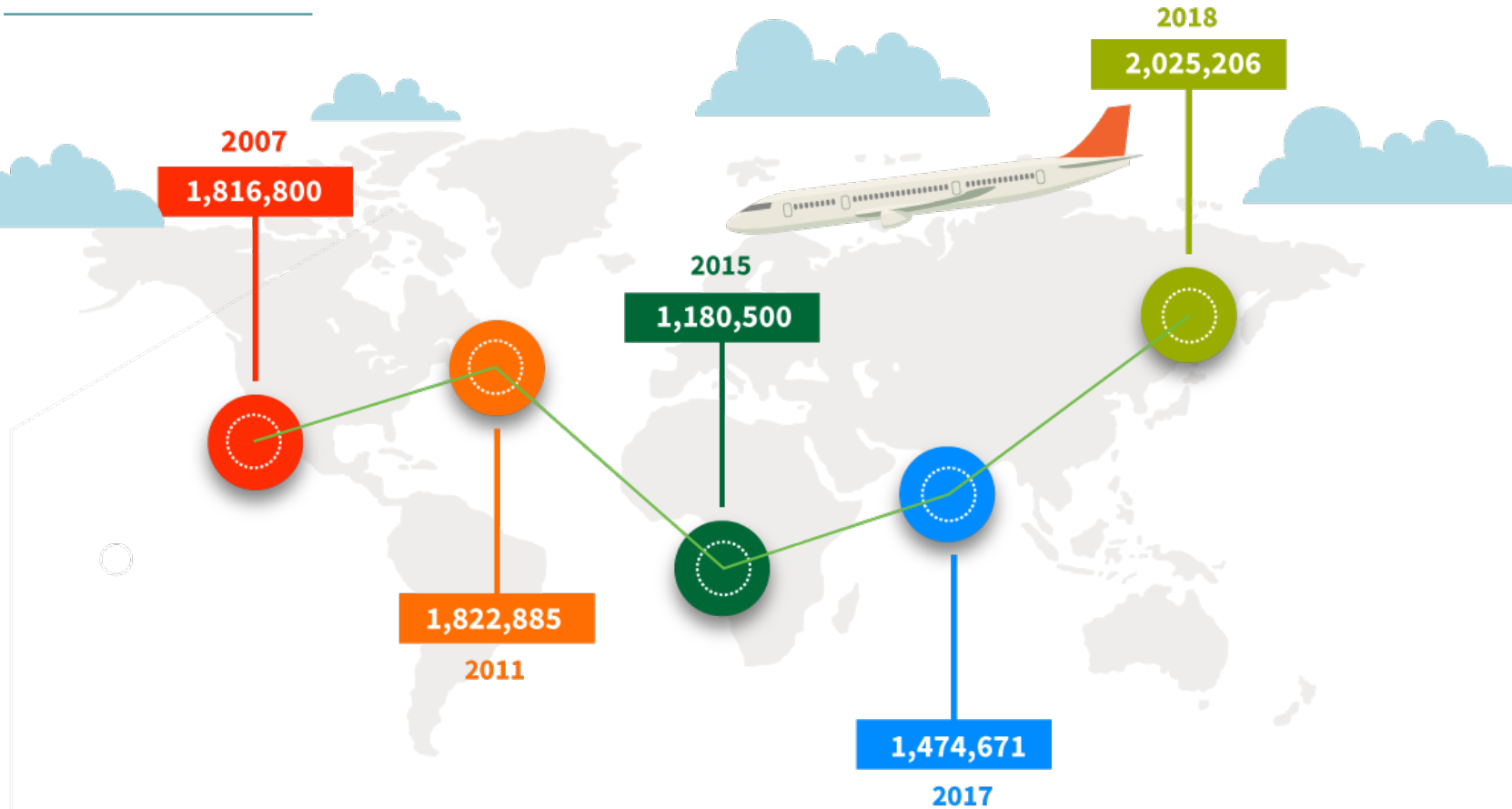
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Purpose of Visit



Overview of Performance - 2011 to 2018



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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:



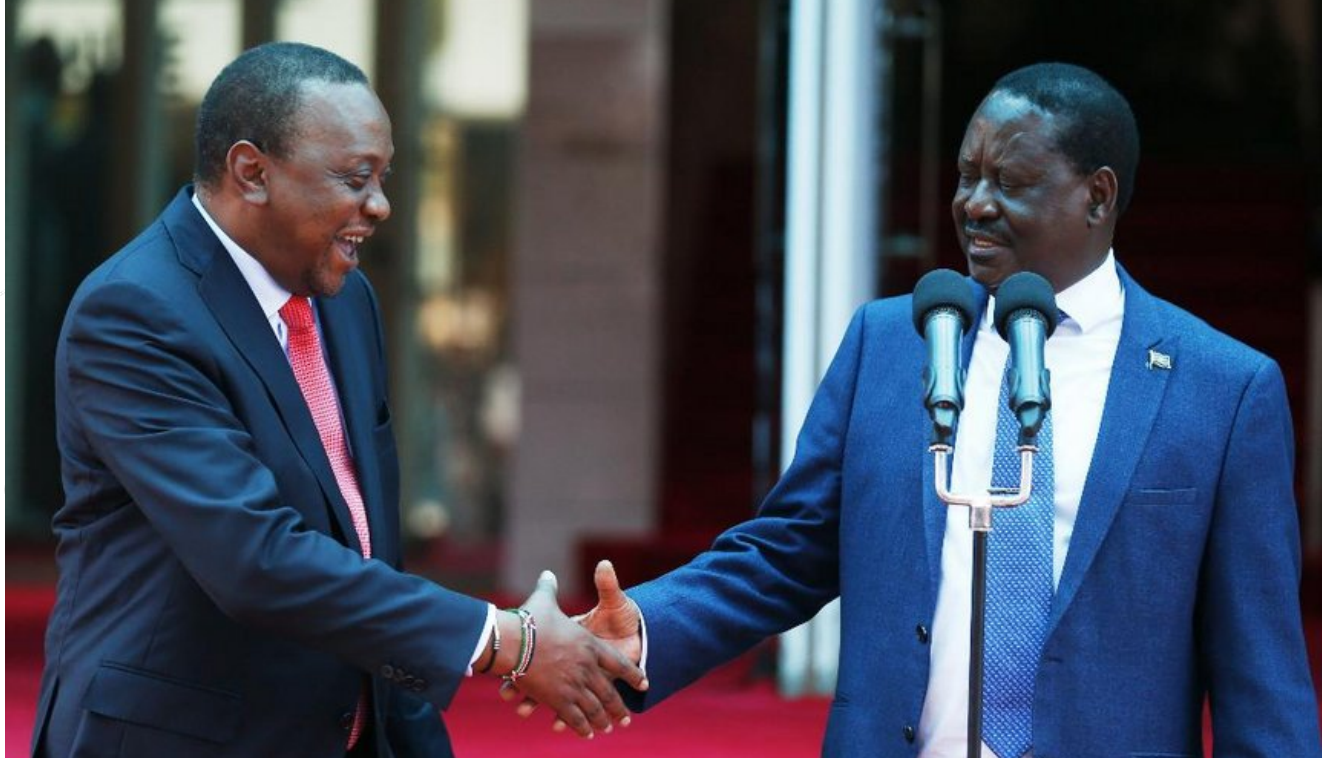
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Drivers for Tourism Growth in 2018: | 1 of 8

Political Stability



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Drivers for Tourism Growth in 2018: | 2 of 8

Improved security situation



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- 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



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- 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



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- 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.

FOUR
POINTS
BY SHERATON

HYATT
HOTELS & RESORTS

Marriott
HOTELS · RESORTS · SUITES

Radisson BLU

MÖVENPICK
HOTELS & RESORTS



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Withdrawal of Travel Advisories



- USA lifted their blanket travel
- UK similarly has only highlighted some locations that its citizens should not visit.



Drivers for Tourism Growth in 2018: | 6 of 9

Visits by Foreign Dignitaries

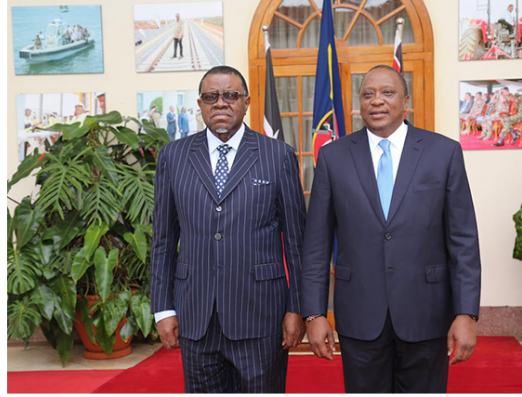
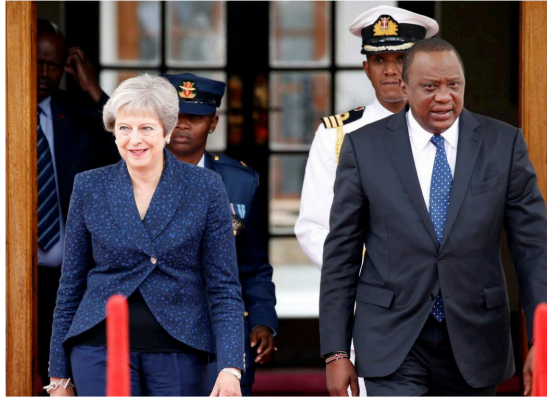


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- There were several prominent visitors in 2018



Drivers for Tourism Growth in 2018: | 7 of 9

Open border policy





- The open border policy for Africans - visa on arrival



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Drivers for Tourism Growth in 2018: | 8 of 9

Revitalised marketing efforts



COME LIVE THE MAGIC

4,198,306 views



652



351



SHARE



SAVE



MagicalKenya

Published on Nov 7, 2017

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Live the Magic Campaign

- 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



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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)



Trends that Will Drive Tourism in Kenya in 2019

Some notable trends will shape destination Kenya's performance in 2019 and the sector needs take note. These include:



Growth in Shared Economy

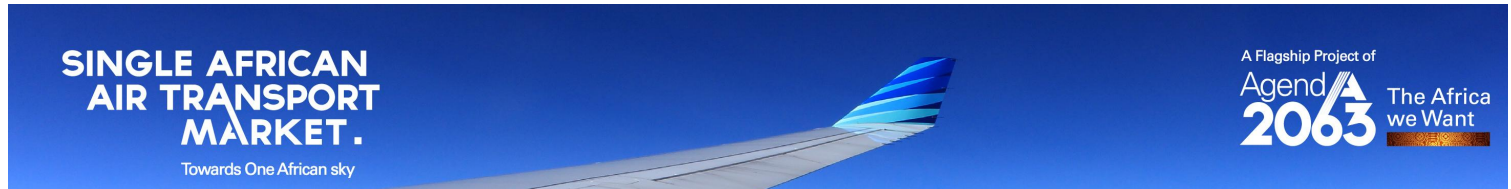
- According to a report by Airbnb, since it's founding **3.5 million** guests have arrived at listings across Africa.
- In Kenya guest arrivals have grown by **68%**.



Trends that will drive Tourism in Kenya in 2019: | 2 of 4

Africa Open Skies

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



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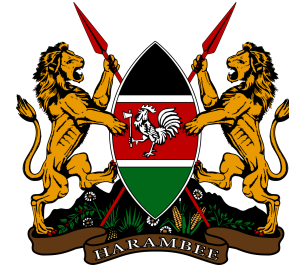


Budget (2017/2018) Vs 2018 Receipts

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

Total Tourism Receipts
157,386,151,000





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SHUKRAN



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