

TOURISM SECTOR PERFORMANCE REPORT

1st QUARTER (JAN-MAR) 2019



**Tourism Research
Institute**

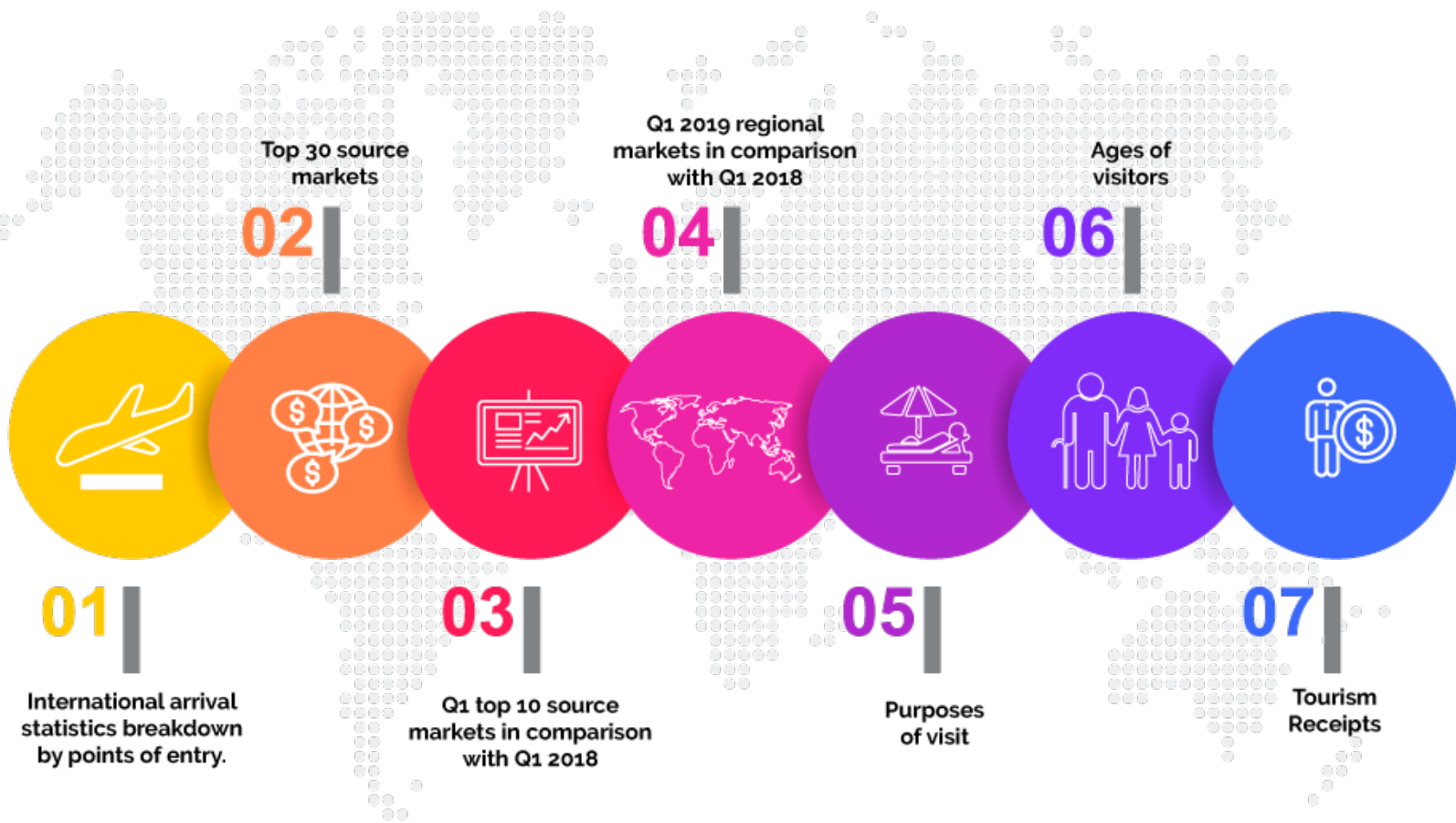
David Gitonga
Ag. CEO, Tourism Research Institute



INTRODUCTION

Tourism Research Institute has compiled 2019 1st quarter tourism performance report which highlights the following:





This report defines a tourist as a person traveling to and staying in places outside his/her usual environment for at least 24 hours and not more than one consecutive year for leisure, business and other purposes.



METHODOLOGY

The source of data for tourist arrivals is the Department for Immigration and Border Management captured through the PISCES software

(Personal Identification Secure Comparison and Evaluation System).



Further, this Institute carried out a tourists exit survey in the months of February and March 2019 at the major entry points. The data gathered in the survey has been used to determine purposes of visit and ages of tourists.





ARRIVAL STATISTICS BY POINTS OF ENTRY



**ARRIVALS
Q1-2019**

-1.359%

% decrease as compared to the same period in 2018 when arrivals were 477.454

1.7%

FEBRUARY

% growth recorded in February 2019

1%

470,966

Total Number of International Visitors in Q1 of 2019

MARCH

Actual decline was in March 2019. Attributed to the January 2019 terrorist attack at DusitD2 Hotel

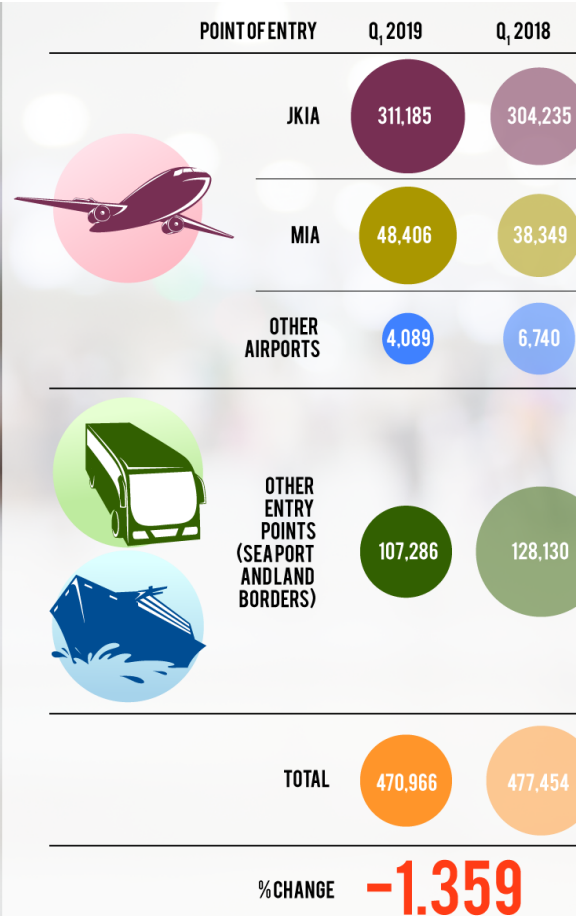
-4%

JANUARY

% growth recorded in January 2019























ARRIVALS FOR Q₁ 2019 BY POINT OF ENTRY IN COMPARISON WITH Q₁ 2018





TOP 30 SOURCE MARKETS

	UG	USA	TZ	UK	INDIA	GERMANY	ITALY	CHINA	FRANCE	CANADA
										
	1	2	3	4	5	6	7	8	9	10
Male	31,868	26,217	28,386	24,671	18,683	10,391	8,915	11,691	8,399	5,410
Female	21,555	23,724	14,893	17,082	8,102	8,613	8,375	4,431	6,862	5,150
Other	2	-	8	-	3	-	-	-	-	-
Total	53,425	49,941	43,287	41,753	26,788	19,004	17,290	16,122	15,261	10,560

	SA	ETHIOPIA	NLD	RWANDA	SOMALIA	NIGERIA	BURUNDI	SWEDEN	AUS	DRC
										
	11	12	13	14	15	16	17	18	19	20
Male	6,951	6,552	5,628	5,809	4,494	5,186	4,846	3,104	2,945	3,404
Female	3,207	3,088	3,756	2,982	3,526	2,065	1,875	2,718	2,742	1,769
Other	-	-	-	1	-	-	-	-	-	1
Total	10,158	9,640	9,384	8,792	8,020	7,251	6,721	5,822	5,687	5,174





TOP 30 SOURCE MARKETS

S. SUDAN POLAND S. KOREA DENMARK NORWAY SPAIN SWITZ ZIM JAPAN BELGIUM



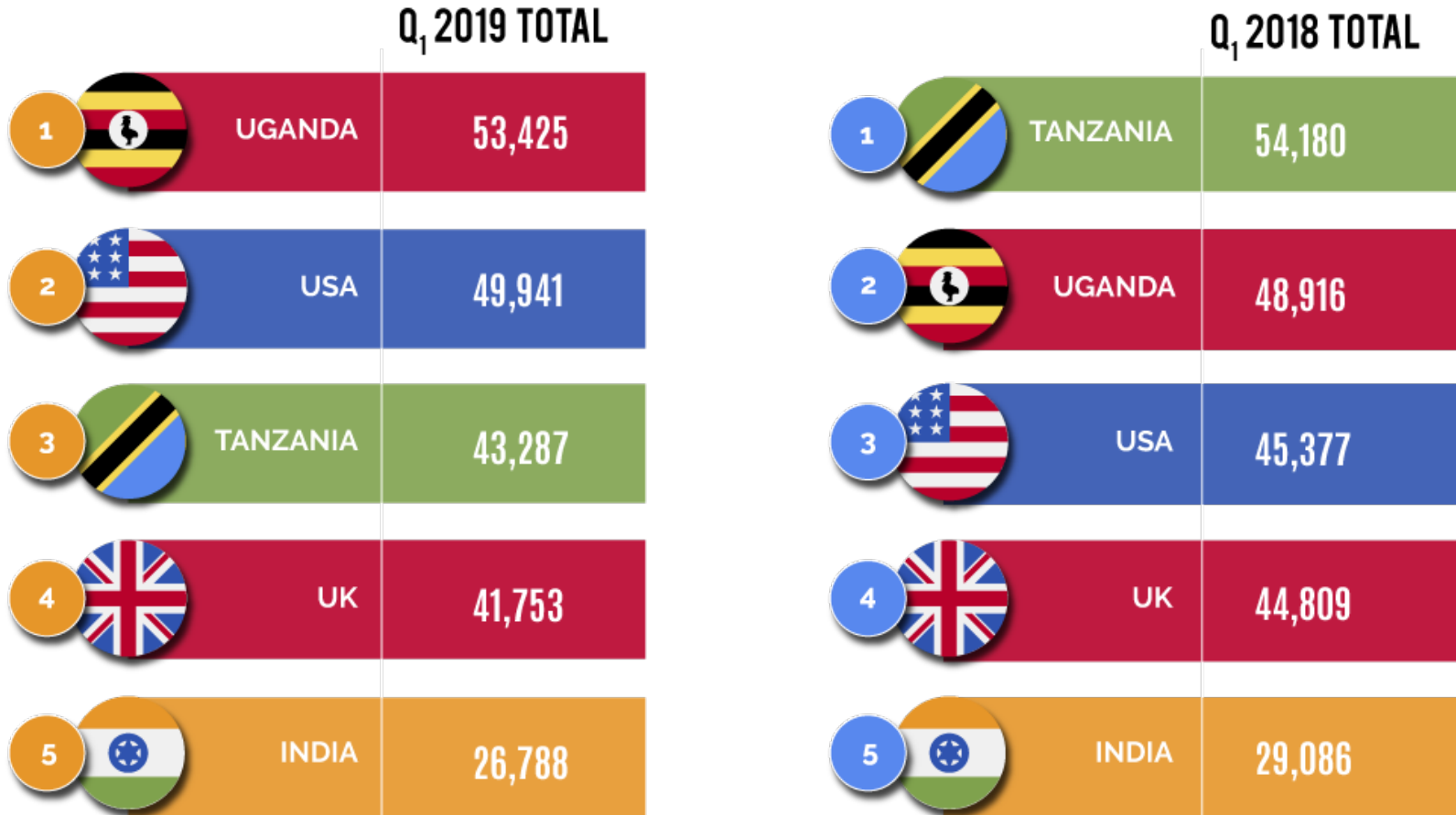
Male	3,119	2,314	2,209	2,222	2,058	1,857	1,800	2,158	2,098	1,791
Female	2,007	2,360	2,163	1,904	1,976	1,603	1,610	1,178	1,131	1,294
Other	1	-	-	-	-	-	-	-	-	-
Total	5,127	4,674	4,372	4,126	4,034	3,460	3,410	3,336	3,229	3,085



Tourism Research Institute

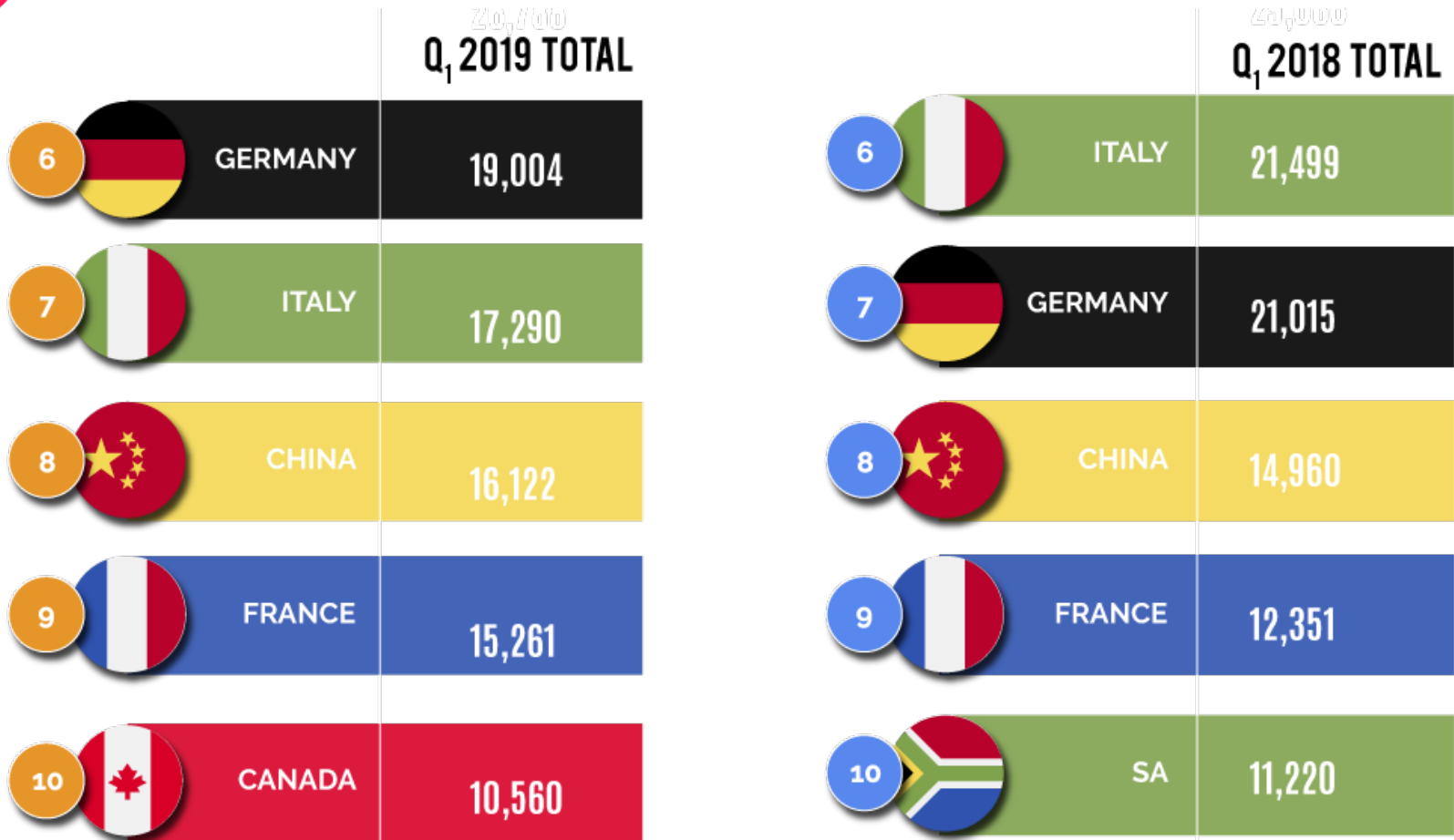


TOP 10 SOURCE MARKETS FOR Q₁ 2019 IN COMPARISON WITH Q₁ 2018



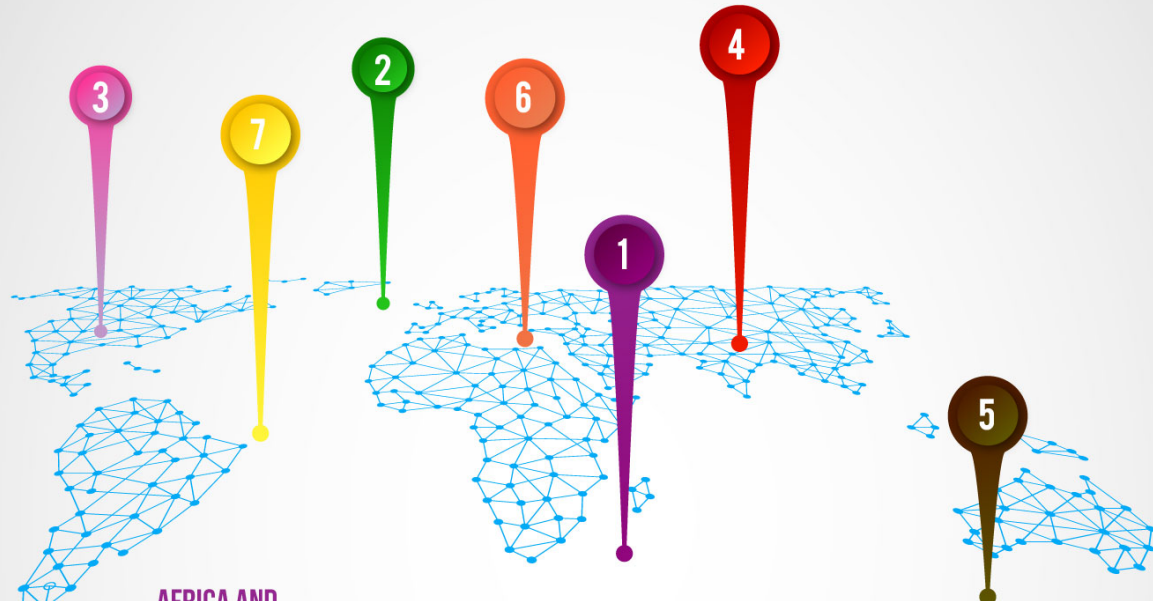


TOP 10 SOURCE MARKETS FOR Q₁ 2019 IN COMPARISON WITH Q₁ 2018





REGIONAL MARKETS FOR Q₁ 2019 IN COMPARISON WITH Q₁ 2018



REGION	AFRICA AND INDIAN OCEAN	EUROPE	AMERICAS	ASIA	OCEANIA	MIDDLE EAST	OTHERS	TOTAL
Q ₁ 2019 TOTAL	186,211	149,446	64,483	58,045	6,528	4,181	2,072	470,966
Q ₁ 2018 TOTAL	190,243	144,130	59,185	60,008	6,172	4,626	13,090	477,454
Q ₁ 2019-Q ₁ 2018	-4,032	5,316	5,298	-1,963	356	-445	-11,018	
% CHANGE	-2.119	3.688	8.952	-3.271	5.768	-9.620	-84.171	



This performance of the regional source markets needs to be correlated with the global indicative performance of outbound travel.



Growth was recorded across all world regions, with the fastest growth recorded in **Europe (7.7%)** and **Asia Pacific (7.1%)**.

Africa and North America also recorded robust growth of **5.1%** and **4.7%** respectively in January, while growth was considerably slower in the Middle East at **1.5%.”**



And according to **ForwardKeys Air Travel Bookings Data**,
“All regions apart from the Middle East posted growth in outbound international travel bookings in the first two months of 2019, with the fastest growth recorded in Asia Pacific **(7.3%)** and Europe **(5.1%).**”



The above positive global growth as reported by WTTC and **ForwardKeys** are indicative that in the absence of any local adverse events, arrivals to Kenya are bound to regain a growth trajectory for the rest of the year.





PURPOSES OF VISIT DURING THE 1ST Q





AGES OF VISITORS DURING THE 1ST Q

33%
40-49yrs



20%
+50yrs

13%
0-29yrs



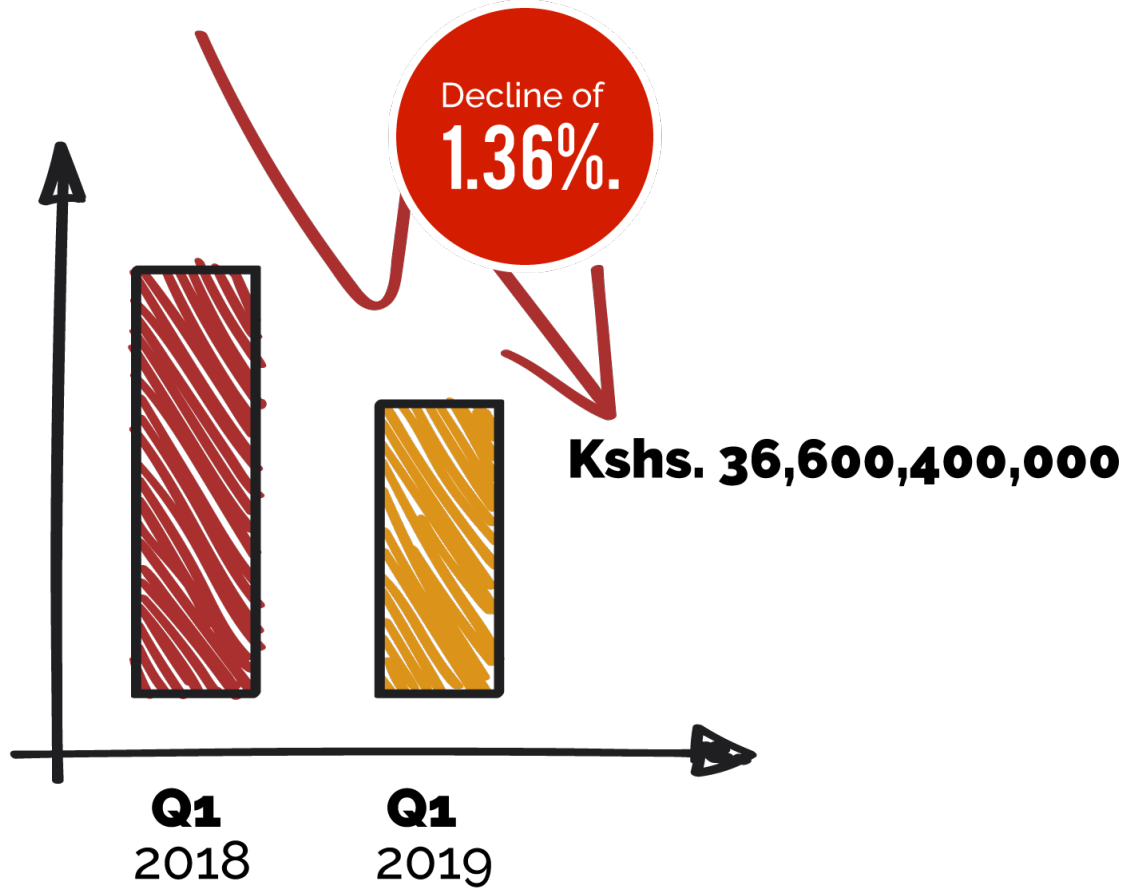
34%
30-39yrs





TOURISM RECEIPTS

Kshs. 37,104,693,000



END

