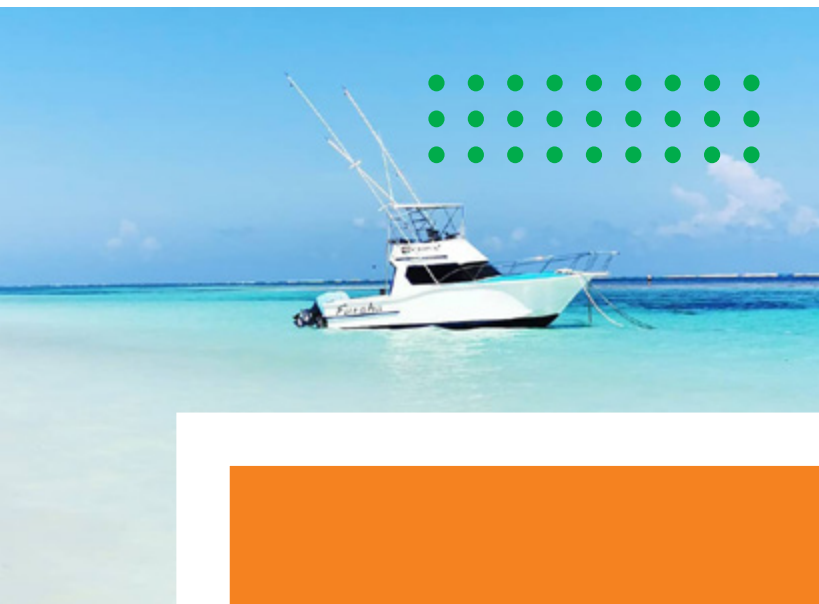
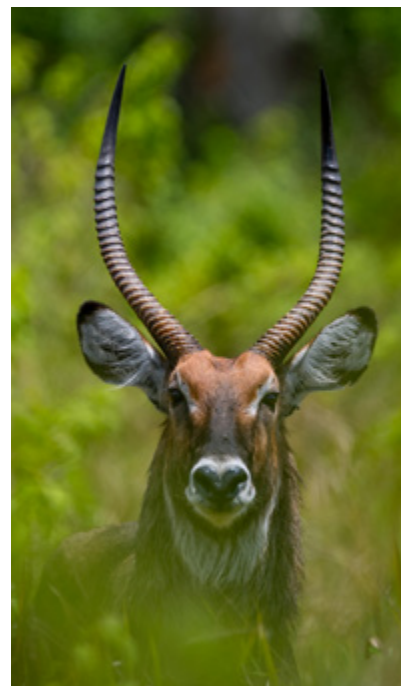
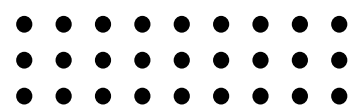




**Tourism
Research
Institute**



ANNUAL **TOURISM SECTOR** **PERFORMANCE** REPORT 2021



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ACRONYMS AND ABBREVIATIONS

AEO	Africa Economic Outlook
COVID 19	Corona Virus Disease
CAPEX	Capital Expenditure
EU	European Union
FDI	Foreign Direct Investment
GDP	Gross Domestic Product
HEC	Human Elephant Conflict
HWC	Human wildlife Conflict
ICAO	International Civil Aviation Organization
ITB	Internationale Tourismus Börse
IAPCO	International Association of Professional Congress Organizers
ICCA	International Congress and Convention Association
JKIA	Jomo Kenyatta International Airport
KTSA	Kenya Tourism Satellite Account
KSM	Kisumu International Airport
KNBS	Kenya National Bureau of statistics
KAA	Kenya Airport Authority
KQ	Kenya Airways
KWS	Kenya Wildlife Service
MOH	Ministry of Health
MIA	Moi international Airport
MLD	Malindi Airport
MDP	Management Development Programmes
MAN	Manda Airstrip
MEA	Middle East and Africa
MICE	Meeting, Incentives, Convention & Exhibition
NAN	Nanyuki Airstrip
RPK	Revenue passenger per Kilometer
SGR	Standard Gauge Railway
SMEs	Small Medium Enterprises
TRI	Tourism Research Institute
UNWTO	United Nations World Tourism Organization
USD	United State Dollars
UKU	Ukunda Airstrip
WLN	Wilson Airport
WHO	World Health Organization
WTTC	World Travel and Tourism Council
WTM	World Travel Market

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01

INTRODUCTION

1.1 Global Outlook Of Tourism Performance In 2021

Following a difficult end to 2020, global tourism suffered setbacks in the year 2021 as countries tightened travel restrictions in response to new virus outbreaks.

According to the latest edition of the UNWTO World Tourism Barometer 2021, all world regions continued to experience large drops in tourist arrivals in the first month of the year. Mandatory testing, quarantines, and in some cases the complete closure of borders, have all hindered the resumption of international travel. In addition, the speed and distribution of the vaccination roll-out have been slower than expected, further delaying the restart of tourism¹.

By the end of September 2021, international tourist arrivals worldwide were **20%** lower than the same period in 2020, and **76%** below 2019 levels (UNWTO barometer 2021). The Americas recorded the strongest results in the first nine months of 2021, with arrivals up **1%** compared to 2020 but still **65%** below 2019 levels. Europe saw an **8%** decline

compared to 2020, which is **69%** below 2019. In Asia and the Pacific arrivals were **95%** below 2019 levels as many destinations remained closed to non-essential travel. Africa and the Middle East recorded **77%** and **82%** drops respectively compared to 2019.

According to the latest UNWTO data, international tourist arrivals are expected to remain **70%** to **75%** below 2019 levels in 2021, a similar decline as in 2020. Export revenues from international tourism was projected to reach **US\$ 700-800 billion** in 2021, a small improvement from 2020 but less than half the **US\$ 1.7 trillion** recorded in 2019. The direct economic contribution of tourism was about **US\$ 1.9 trillion** in 2021 well below the pre-pandemic value of **US\$ 3.5 trillion**.

1.2 Kenya Tourism Sector Overview 2021

Travel and tourism is one of the largest and strongest pillars of the modern economy, globally. In Kenya, the sector is a major economic contributor to the country's Gross Domestic Product (GDP) at 10.4% and directly employs 990,000 jobs (KTSA2019). The sector is also instrumental in the social-economic wellbeing of the country's citizens, with multiplier effects in trade, agriculture, construction, manufacturing, and transport among others.

The advent of the Covid-19 pandemic in 2019 and subsequent declaration as a pandemic by WHO on 11th March 2020 has greatly affected the sector, (WHO 2020). The Government introduced various interventions to mitigate the effects of the pandemic to the sector. These measures included economic stimulus program; tourism and hospitality protocols on health and safety; specific inter-county cessation of movement and curfews imposed at different times as infection numbers increased. Other initiatives undertaken include increased focus on domestic tourism, development of the New Vision Strategy for Kenya Tourism among others all geared towards increasing its resilience and increasing capacity to bounce back to 2019 levels.

Compared to earlier projections, there have been mixed results arising from the resurgence of the outbreak in waves as well

as the emergence of different strains of the virus, which has resulted in continuous review of containment measures which have further complicated the consistency in the recovery of the sector. This report presents the performance of Kenya's tourism sector in 2021 while presenting an account of the extent of recovery of the sector from the Covid-19 pandemic through the year. It gives the following key highlights.

- i. Visitor arrivals
- ii. Passenger flight landings.
- iii. Tourism earnings and losses incurred due to Covid-19 pandemic.
- iv. Bed nights and room occupancy.
- v. Performance in the MICE subsector in local and international conferences.
- vi. Initiatives that have supported sector recovery.
- vii. Performance in Tourism Training
- viii. Key highlights from the wildlife sector.

To track sector recovery, the report gives a comparative analysis and reports on the extent of sector recovery from Covid-19 by December 2021. It further presents projections for 2022.

¹<http://www.e-unwto.org/loi/wtobarometereng>
²Kenya Tourism Satellite Account



870,465

International visitor arrivals in 2021

02

VISITOR ARRIVALS AND PASSENGER FLIGHT LANDINGS

2.1 Visitor Arrivals

2.1.1 International Visitor Arrivals

International visitor arrivals to Kenya in the year 2021 closed at **870,465** which represents a growth of **53%** as compared with the previous year arrivals which were **567,848**. The resurgence of the virus in the first half of 2021 characterized by the Delta variant slowed down anticipated recovery but marked improvement started being recorded from the month of June. Growth for the rest of the year was aided by reopening up of the source markets and relaxation of travel restrictions in the country with progress made in the roll-out of Covid-19 vaccines. (See Figure 1 and Table 1)

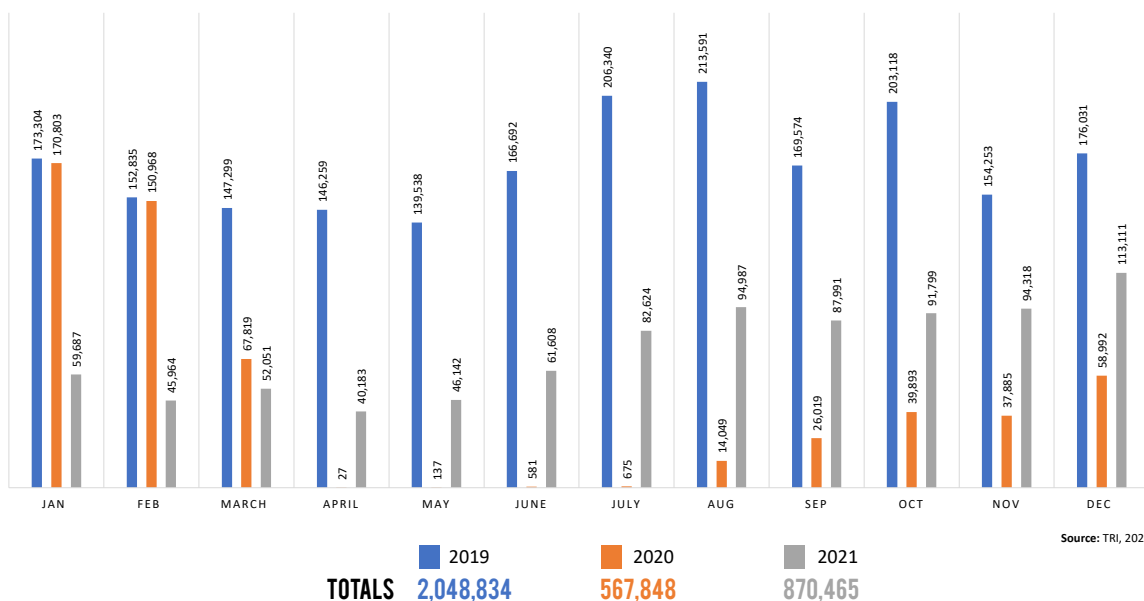


Figure 1: International Visitor Arrivals



Table 1: Monthly International Visitor Arrivals through JKIA, MIA and Others

Entry Points	JKIA			MIA			Others			Totals on entry points (JKIA, MIA & Others)		
	2019	2020	2021	2019	2020	2021	2019	2020	2021	2019	2020	2021
Jan	113,050	113,078	43,234	15,740	12,205	3,045	44,514	45,520	13,408	173,304	170,803	59,687
Feb	106,198	106,345	32,047	12,761	11,086	3,005	33,876	33,537	10,912	152,835	150,968	45,964
Mar	93,571	43,346	37,214	20,159	3,950	3,194	33,569	20,523	11,643	147,299	67,819	52,051
Apr	103,522	8	27,850	4,769	0	3,037	37,968	19	9,296	146,259	27	40,183
May	98,596	93	32,153	3,591	0	1,735	37,351	44	12,254	139,538	137	46,142
Jun	122,122	440	46,494	6,650	2	2,038	37,920	139	13,076	166,692	581	61,608
Jul	149,994	467	64,498	8,520	1	4,532	47,826	207	13,594	206,340	675	82,624
Aug	148,816	13,371	72,291	10,988	548	6,257	53,787	130	16,439	213,591	14,049	94,987
Sep	121,668	16,565	66,667	9,199	662	3,633	38,707	8,792	17,691	169,574	26,019	87,991
Oct	138,033	27,932	67,608	11,157	1,179	5,201	53,928	10,782	18,990	203,118	39,893	91,799
Nov	108,755	27,311	71,271	12,315	1,040	5,435	33,183	9,534	17,612	154,253	37,885	94,318
Dec	119,646	43,406	82,867	12,373	3,113	7,637	44,012	12,473	22,607	176,031	58,992	113,111
Total	1,423,971	392,362	644,194	128,222	33,786	48,749	496,641	141,700	177,522	2,048,834	567,848	870,465

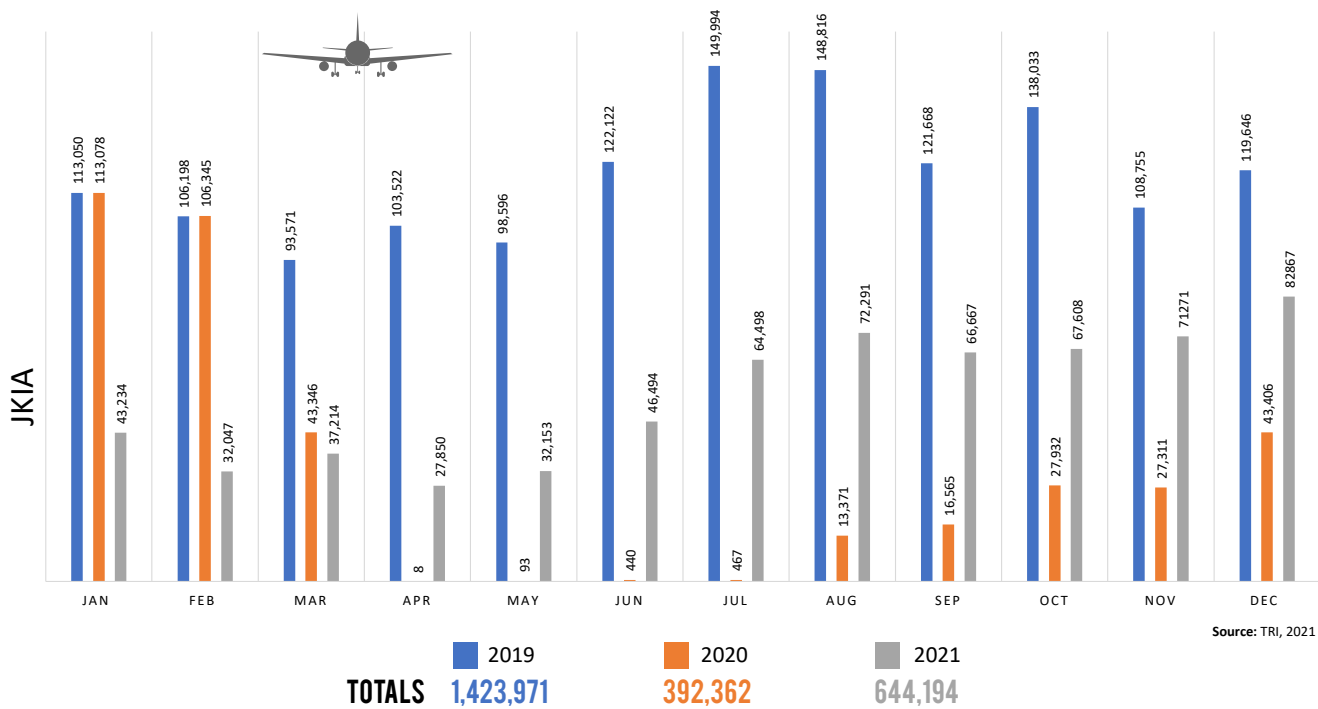


Figure 2: Monthly International Visitor Arrivals through JKIA

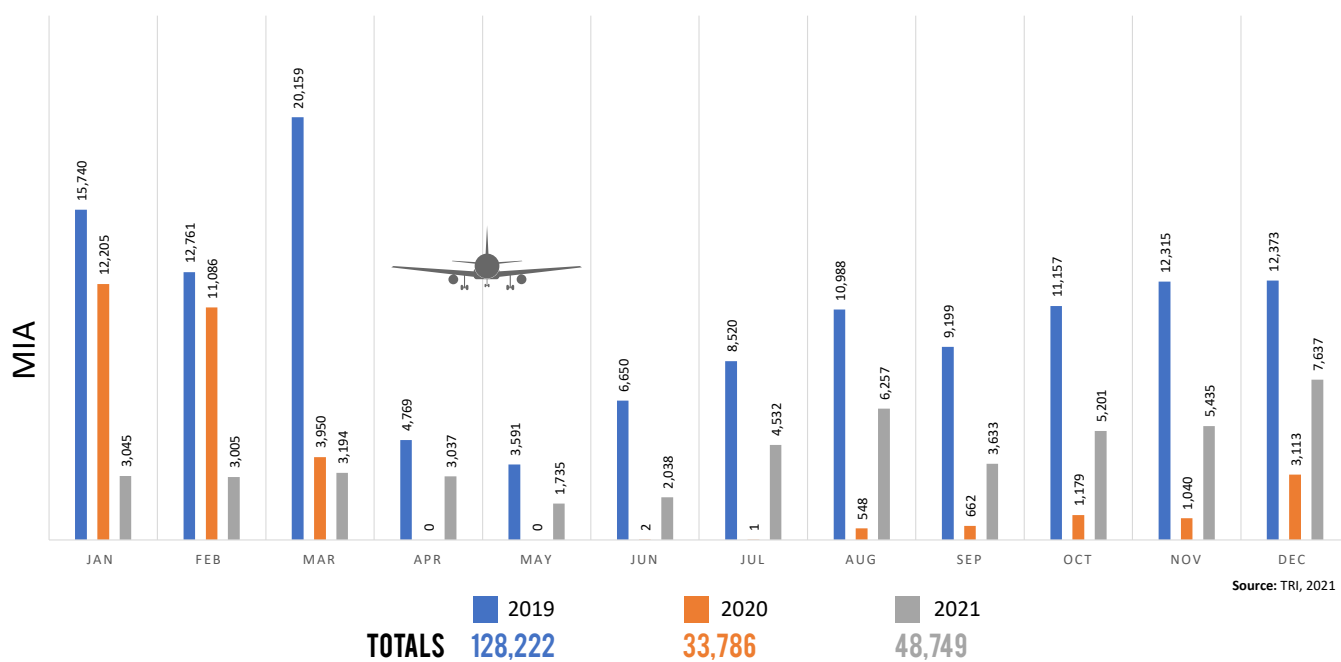


Figure 3: Monthly International Visitor Arrivals through MIA

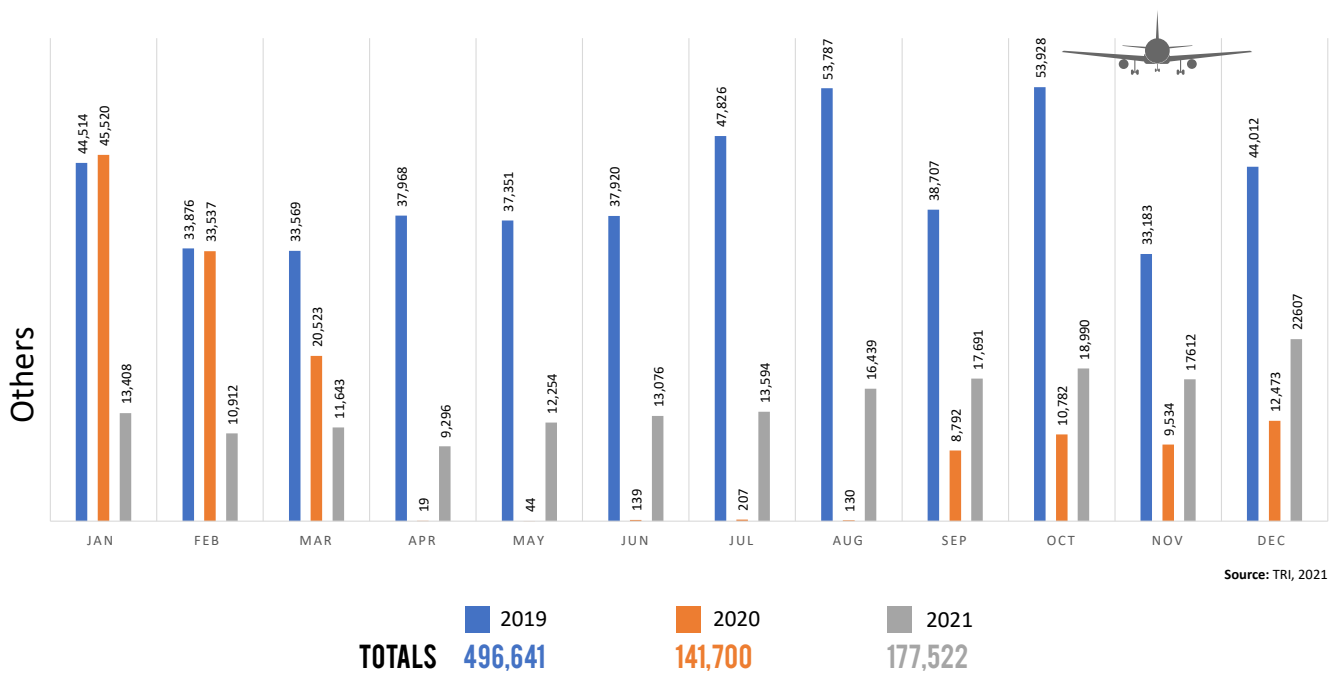


Figure 4: Monthly International Visitor Arrivals through Others

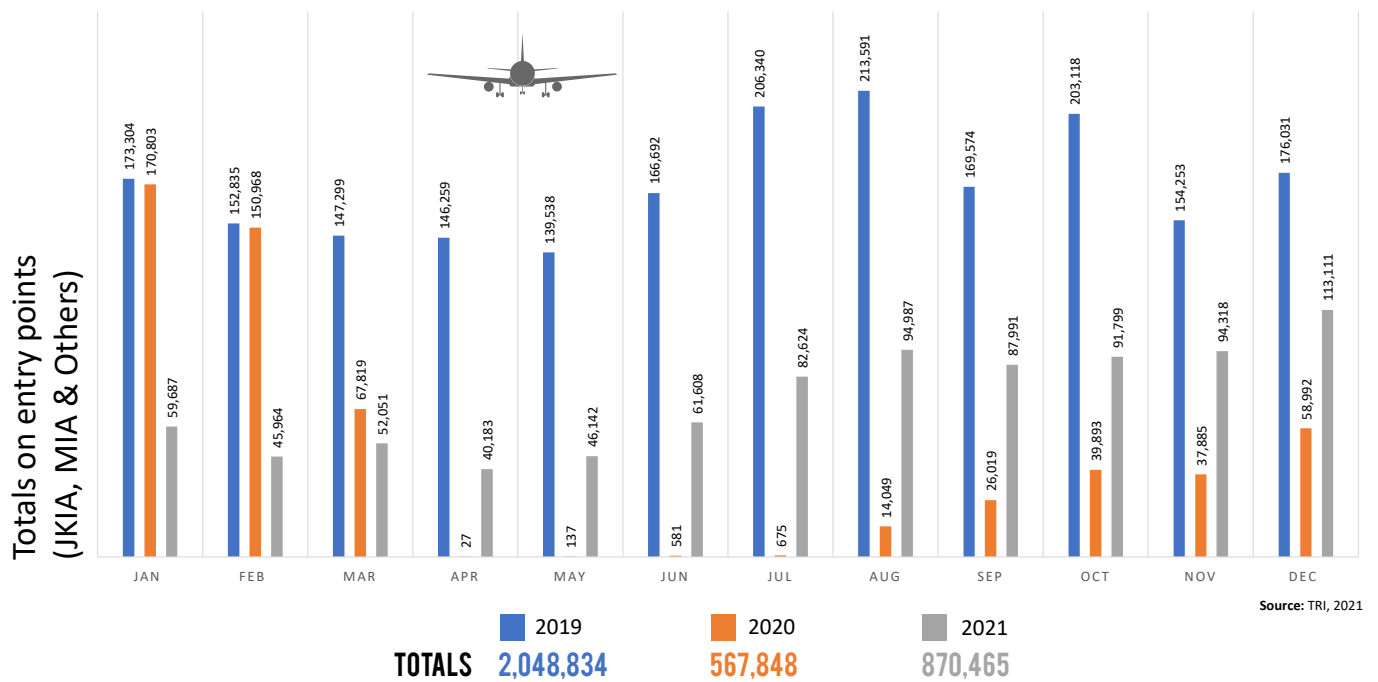


Figure 5: Totals on all entry points

2.1.2 Top 10 Performance by Market Regions, 2021

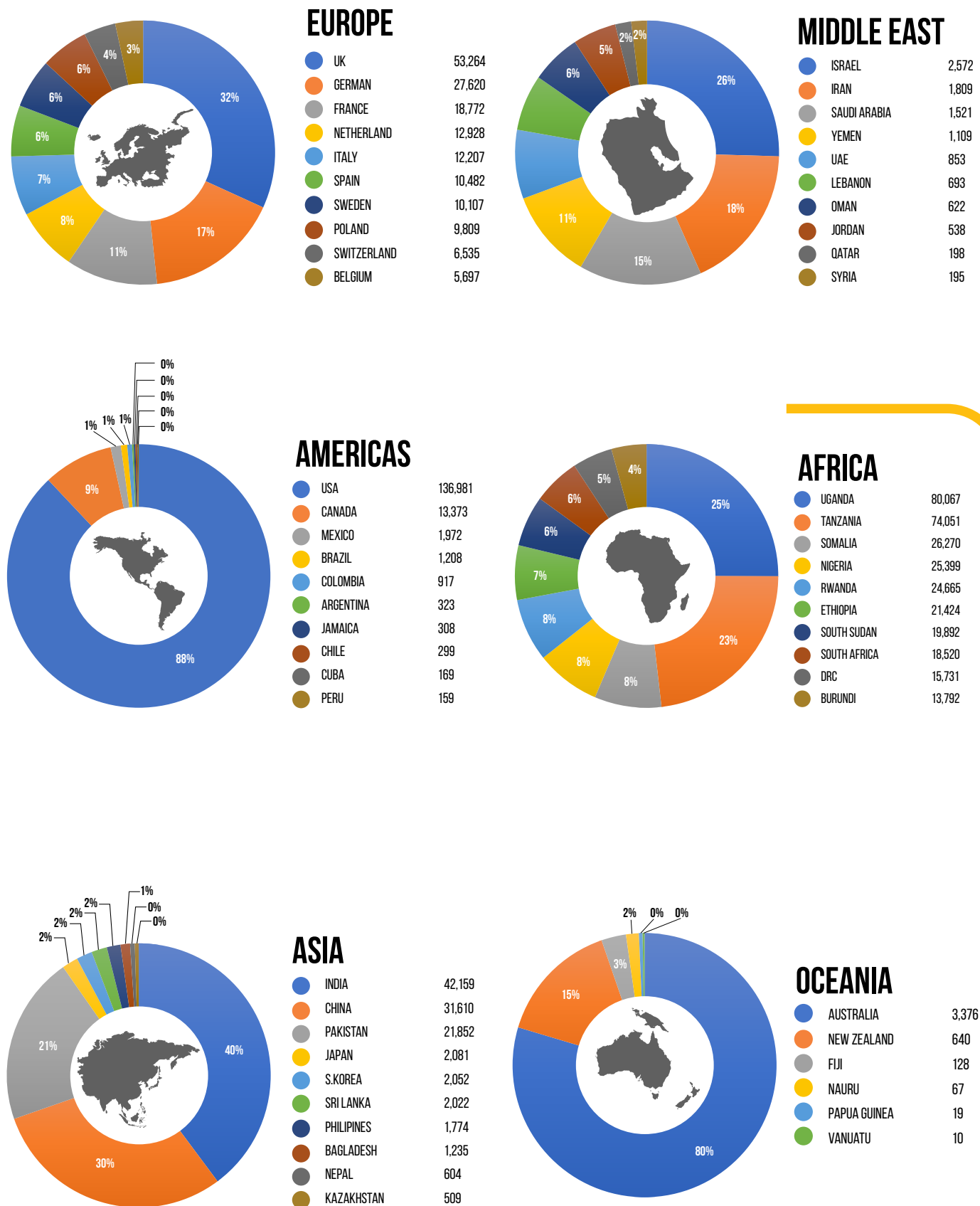


Figure 6: Top 10 Performance by Market Regions, 2021

Source KAA

2.1.3 Purpose of Visit 2021

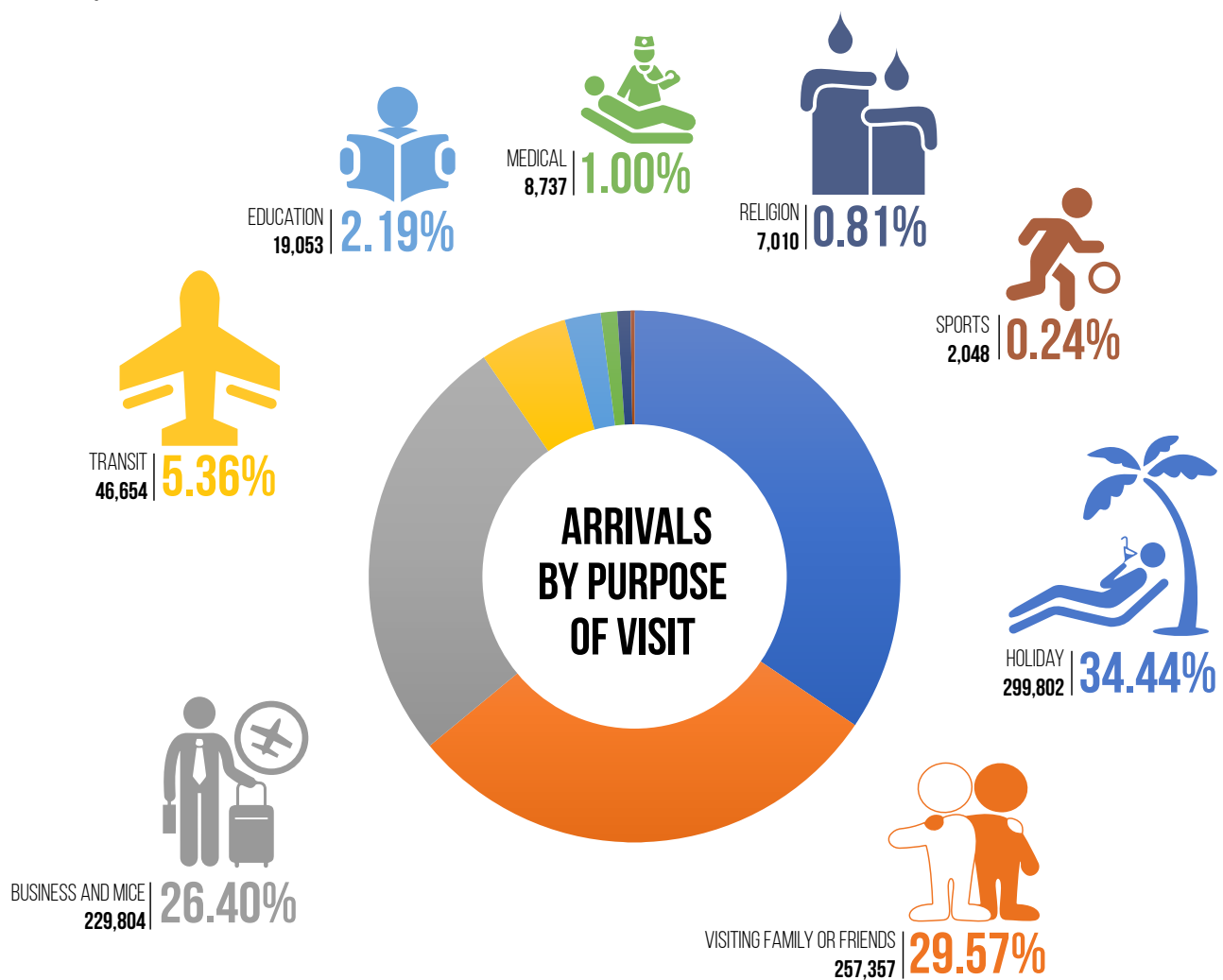


Figure 7: Purpose of visit

2.1.4 Top Two Purposes of Visits for lead Source Markets

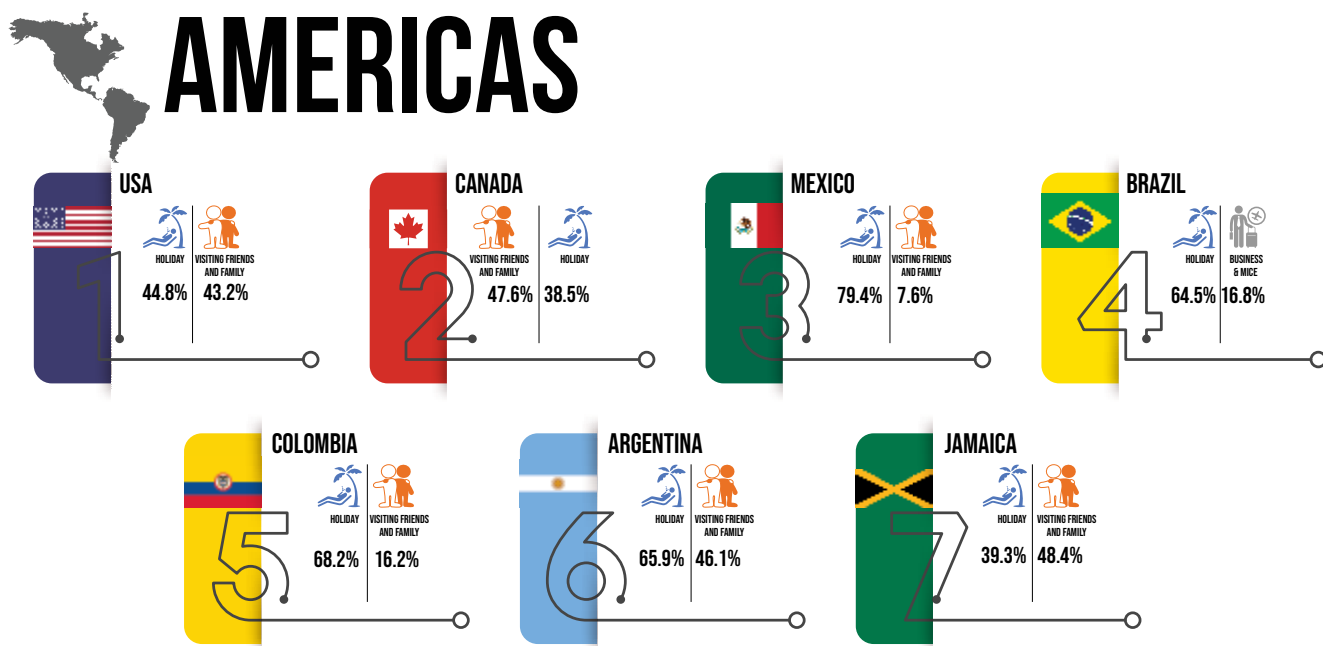


Figure 8a: Top two Purposes of visit - Americas

AFRICA

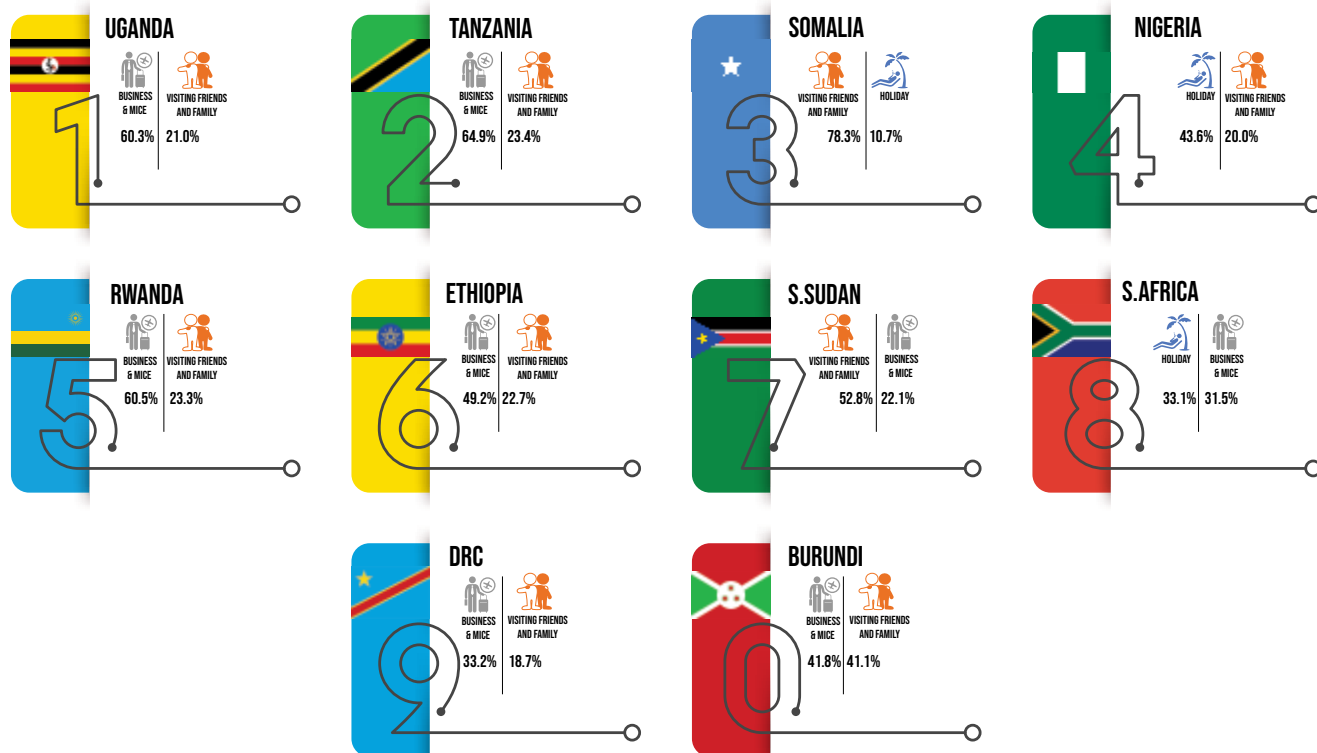


Figure 8b: Top two Purposes of visit - Africa

EUROPE

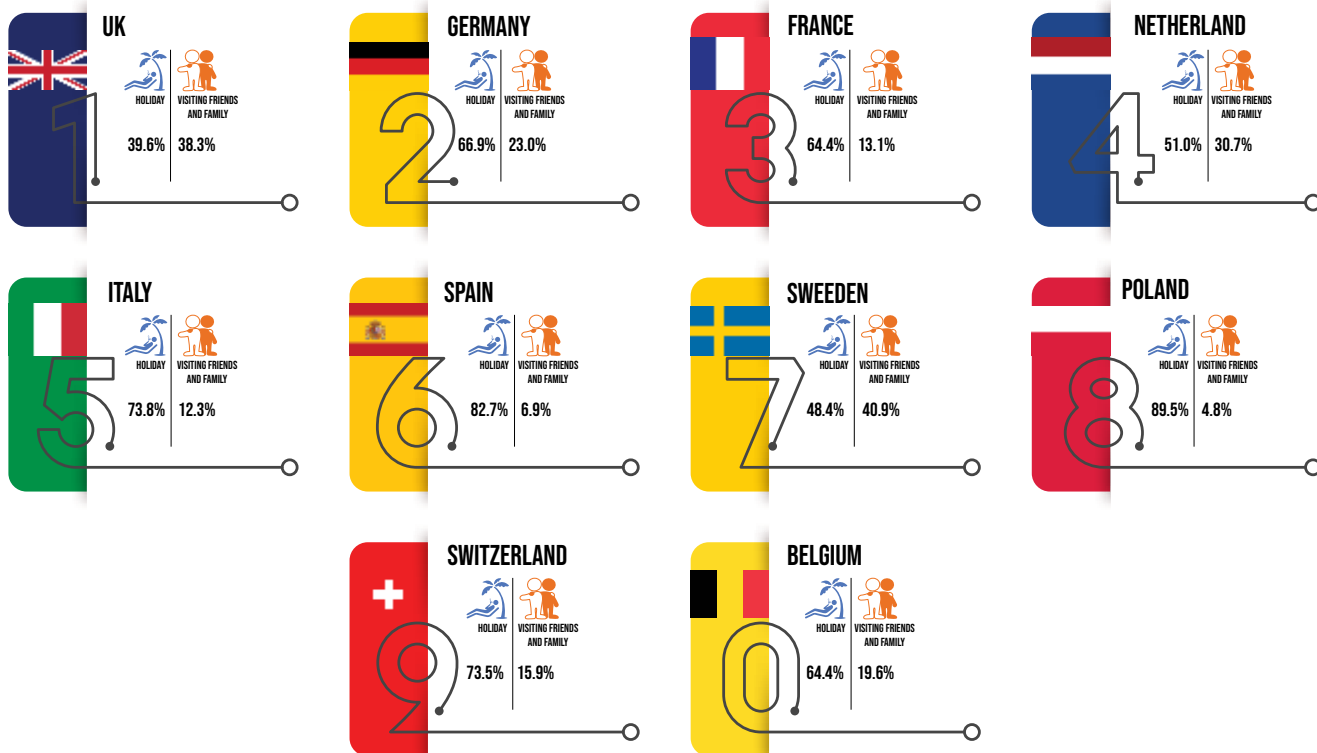


Figure 8c: Top two Purposes of visit - Europe

ASIA

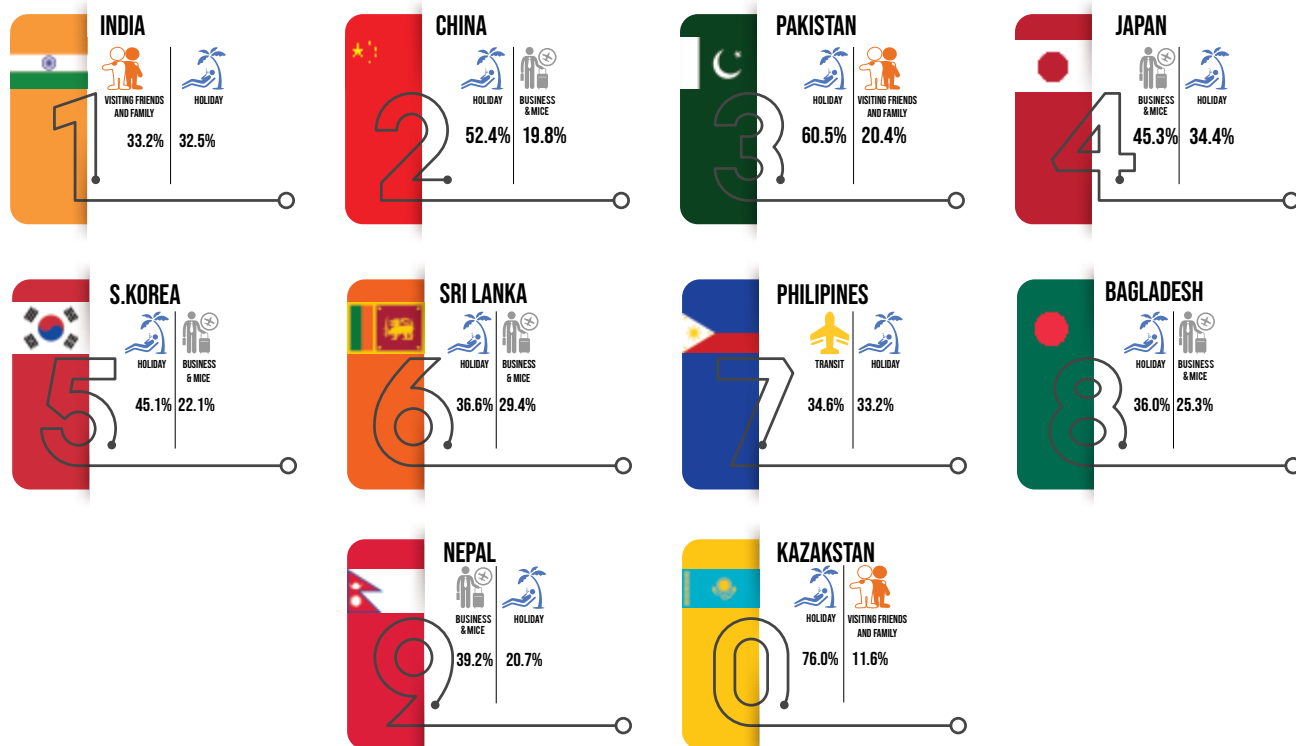


Figure 8d: Top two Purposes of visit - Asia

MIDDLE EAST

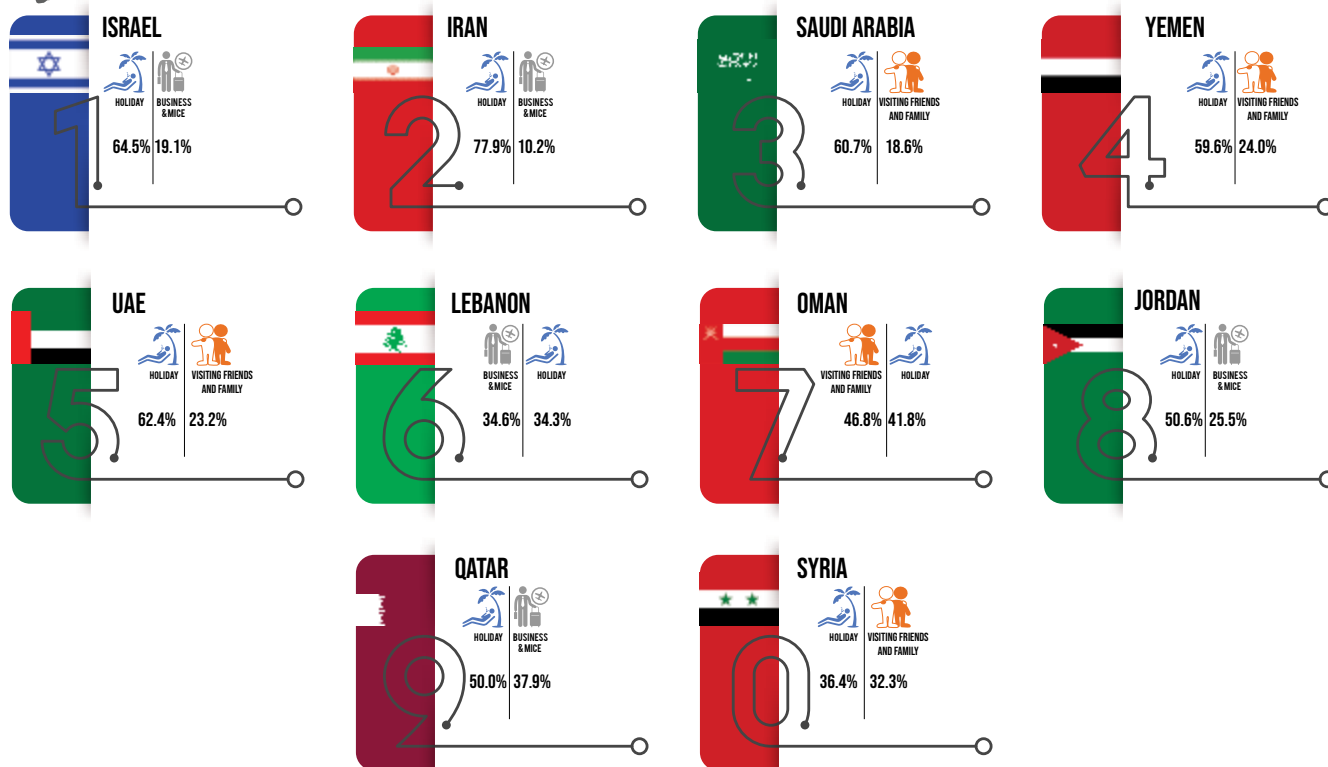


Figure 8e: Top two Purposes of visit - Americas



OCEANIA



AUSTRALIA



VISITING FAMILY
AND FRIENDS

38.1%



HOLIDAY

42.7%



NEW ZEALAND



HOLIDAY

47.8%



VISITING FAMILY
AND FRIENDS

35.6%

Figure 8f: Top two Purposes of visit - Oceania

2.2 Passenger Flights Landings

2.2.1 Overall Airports Performance

i. Total international and domestic passenger flight landings: Year 2020 Vis-à-vis 2019

The Covid-19 Pandemic brought unprecedented challenges to the civil aviation industry in Kenya, leading to a sharp decline in the number of scheduled and major charter passenger flight landings beginning the second quarter of the year 2020.

Prior to the onset of the Pandemic, the eight main hubs in the country in terms of scheduled and major international and domestic charter passenger flights, namely Jommo Kenyatta International Airport (JKIA), Moi International Airport (MIA), Wilson Airport (WLN), Kisumu International Airport (KSM), Malindi Airport (MLD), Manda Airstrip (MAN), Ukunda Airstrip (UKU) and Nanyuki Airstrip (NAN) generated a total 95,215 movements, or a monthly average of about 7,935 flights.

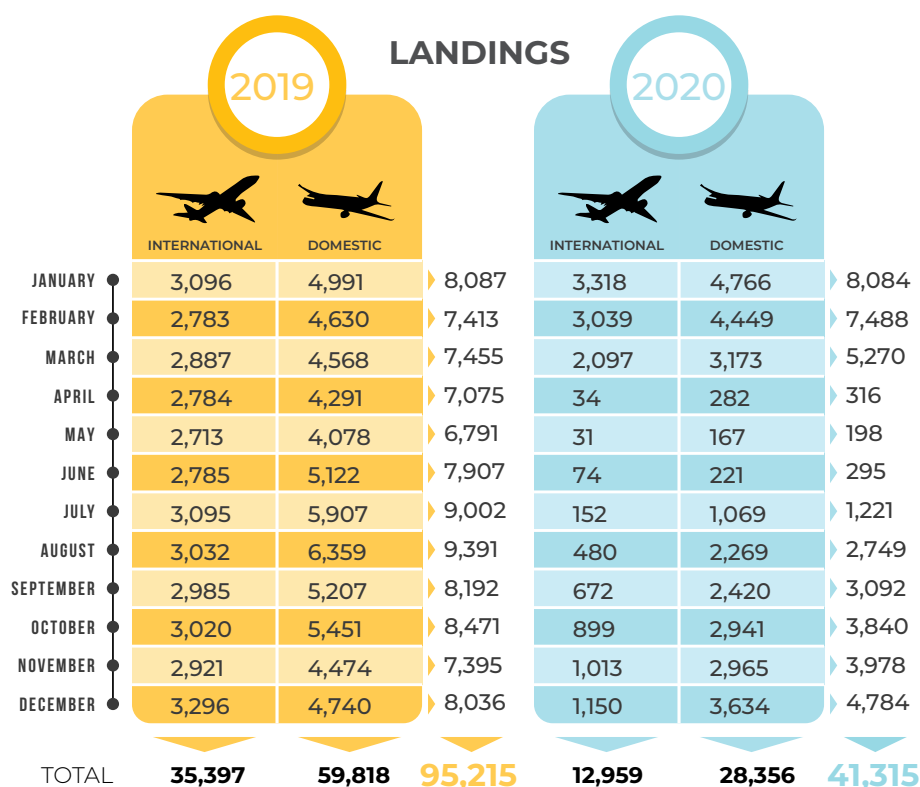
In 2019, the highest number of flights was realized in the third quarter of the year with a total of 26,585 passenger flight landings. Arising from the effects of the corona virus pandemic, the airports in focus together

generated a monthly average of 3,443 flights which was a 57% drop when compared to the performance achieved in 2019. In 2020, the performance of international flight arrivals was at -63% when compared to that of 2019. The domestic performance was slightly better at -54% in 2020. Notably the second quarter of the year was the most affected when the country was put on a passive mode through lock-down to try and contain the spread of the virus.

The year ended with some visible but guarded signs of recovery particularly within the domestic sector as the international movements were still substantially constrained by the Covid-19 health protocols.

Even while the year 2020 turned out to be the worst performing in as many years for civil aviation industry in Kenya, there was a gradual turn-around with the last quarter of the year 2020 generating an average monthly growth rate of about 12%, with the domestic movements providing much of this growth.

Table 2: Passenger Flight Landings 2019-2020



Source KAA

ii. **Performance of international and domestic passenger flights arrivals: Year 2020 Vis-à-vis 2021**

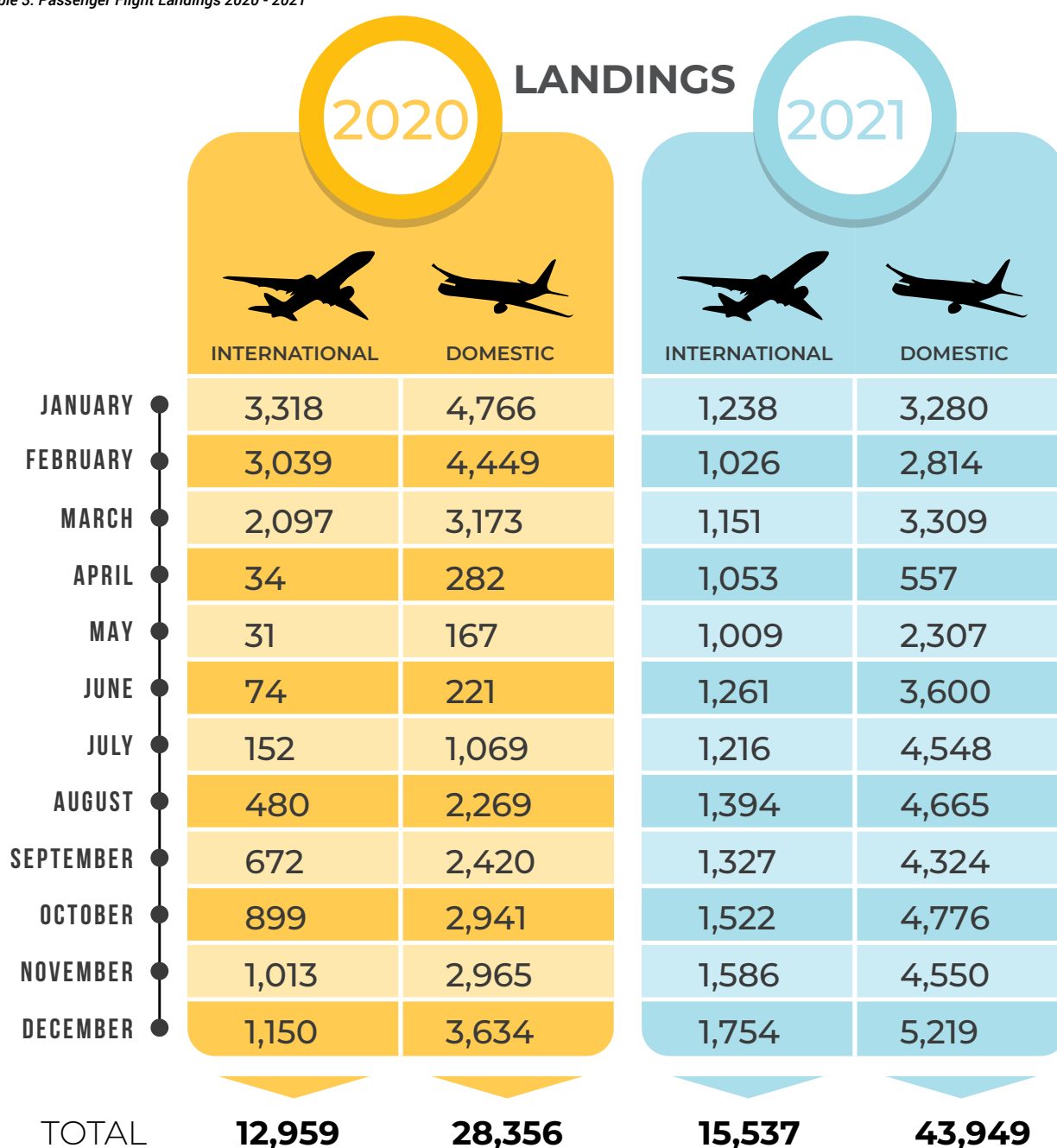
The year 2021 built up on the momentum created in the last few months of year 2020, and safe for a brief disruption in April arising from lock-down of some counties perceived to have been largely responsible for resurgence of high infection rates, the monthly average landings are already above the 2020.

Year 2021 sustained a month-on-month growth rate of **12%** from January to December 2021. However, much of this growth was sustained by domestic movements which grew by **30%** when compared to 2020 while the international movements grew by **4%** over the same period. Notably the recovery in passenger flight landings has been sustained to a large extent by enhanced frequencies by the existing airlines as well as commencement of operations by new airlines to and from these airports.

While the first quarter of year 2020 surpassed the traffic of year 2021 year on year since the pandemic had not crystalized in the country, the subsequent quarters of the year 2021 displayed a sustained growth particularly for the domestic traffic. The international movements continued to be suppressed by the restrictions still in place across the globe to try and contain the pandemic.

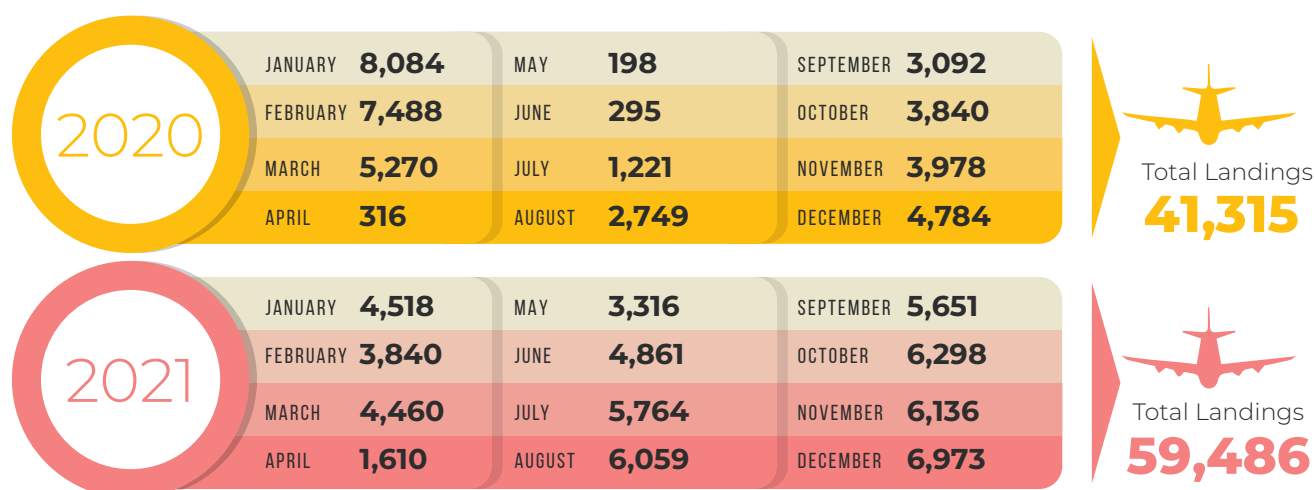
Taken together, passenger flight landings at the airports grew by **44%** when compared to the movements registered in 2020. However, this was still **37.5%** below the pre-pandemic traffic.

Table 3: Passenger Flight Landings 2020 - 2021



Source KAA

Table 4: Total Passenger Flight Landings in main Airports 2020 -2021(International & Domestic)



Source KAA

It is anticipated that with sustained implementation of recovery measures that have been instituted and a month-on-month growth rate of over 11%, the situation will revert

to the pre-Covid-19 flight arrivals in not too distant a future, the new, more rapidly propagating Omicron variant notwithstanding.

2.2.2 Specific Airports Performance

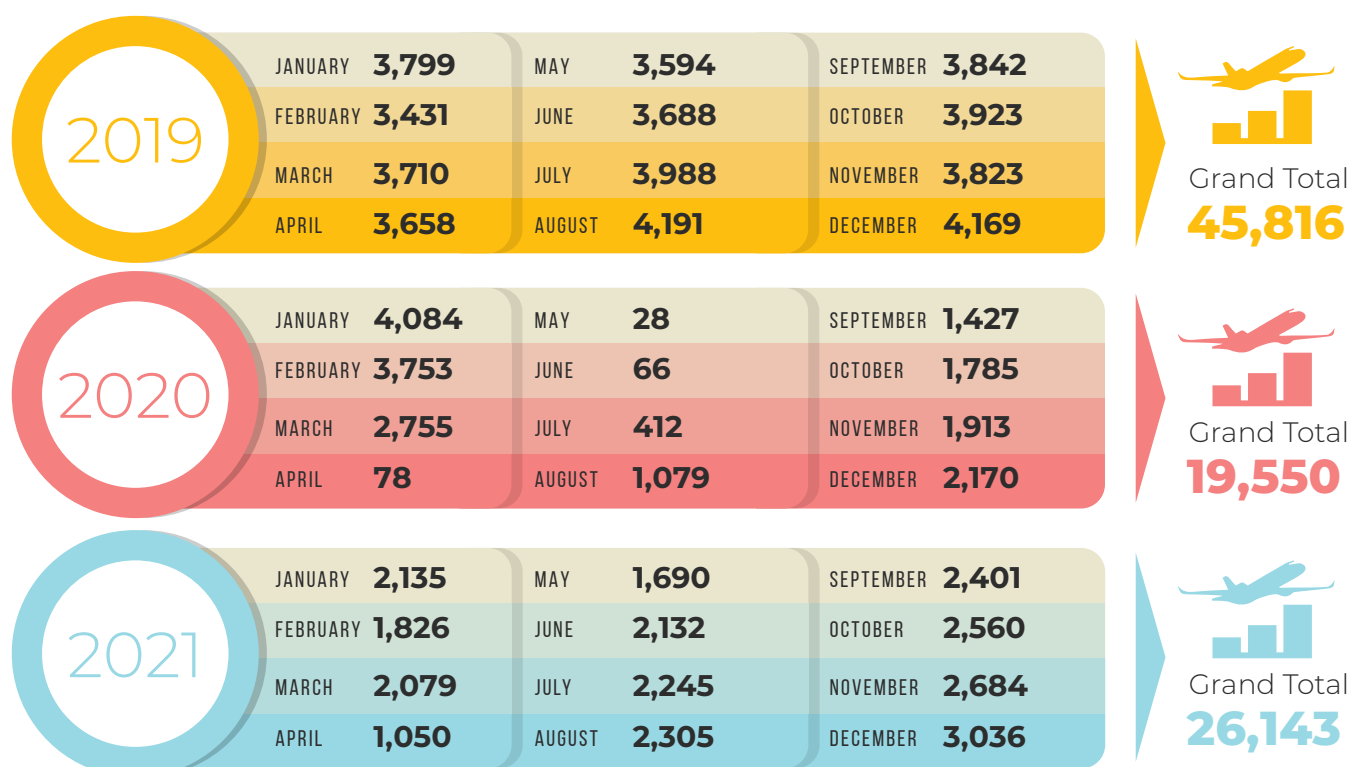
i. Jomo Kenyatta International Airport (JKIA)

JKIA, the main aviation hub in Kenya was handling over 35 scheduled passenger airlines, which, prior to the onset of COVID-19 Pandemic in the country, together deployed nearly 46, 000 passenger flight landings in year 2019.

In 2020, at the close of the year, the number of airlines offering scheduled passenger services were less than 30, which together deployed slightly over 19,000 passenger flight landings.

The year 2021 saw a gradual but guarded recovery in civil aviation in the country. JKIA handled over 30 scheduled passenger airlines in the year, with some new airlines such as Air Tanzania, Air Seychelles, Sri Lankan Airlines and Renegade Air and others restarting services to the airport such as Etihad Airways and Jubba Airways. Together, these airlines deployed over 26,000 scheduled passenger flight landings, an indication that tourist arrivals were gradually recovering. (see table 5 below)

Table 5: JKIA Performance in 2019 to 2021



Source KAA

ii. Kisumu International Airport Passenger Flight Landings

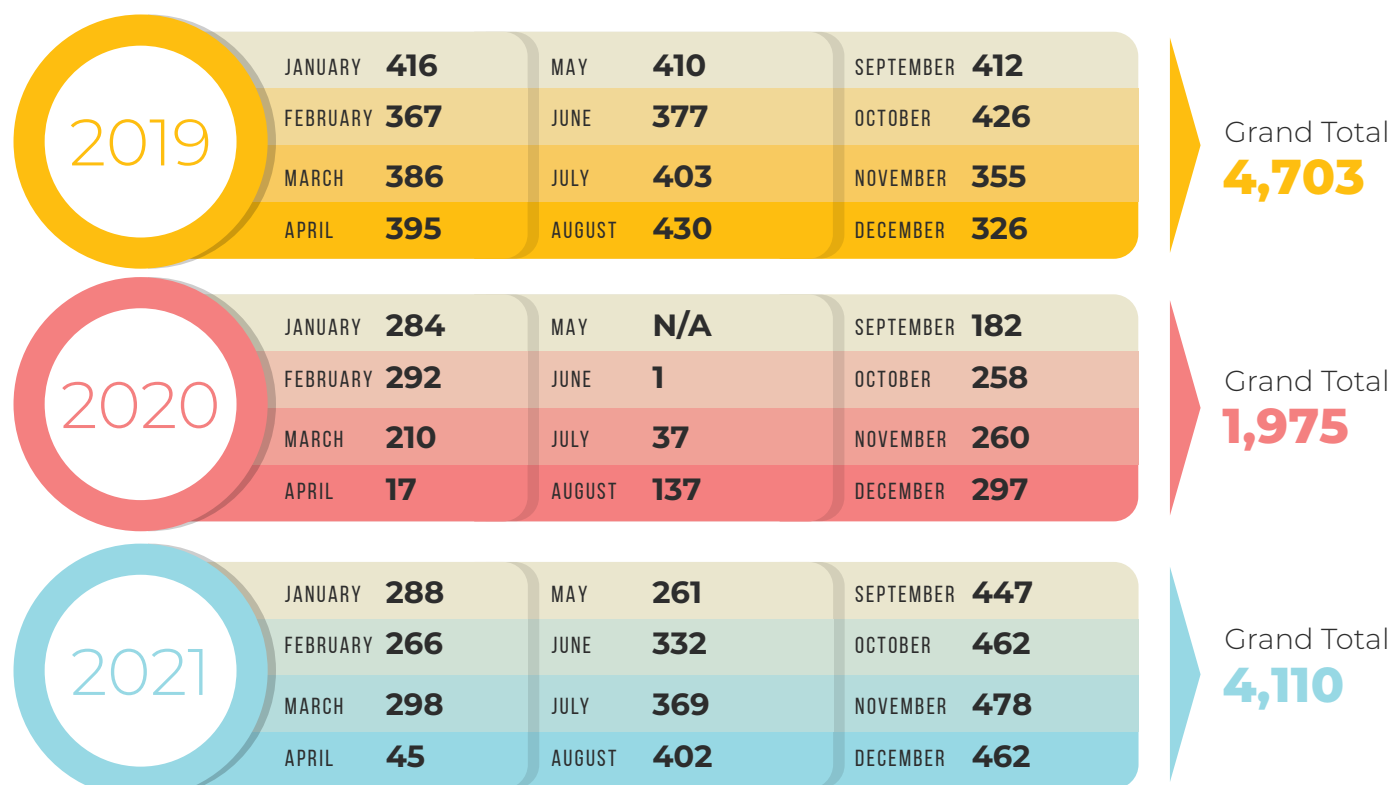
The western tourist circuit is supported by among other Kisumu International Airport (KIA) in terms of aviation traffic. The airport was handling 5 main scheduled passenger airlines, which, prior to the onset of COVID-19 Pandemic in the country, together deployed slightly over 4,700 passenger flight landings in year 2019.

With COVID-19 Pandemic challenges, even while the number of airlines dropped only slightly across the year,

the airport handled fewer traffic in terms of number of frequencies deployed, which in year 2020 were only about 2,000.

The airport witnessed a sustained recovery both in terms of number of scheduled operators as well as the deployed frequencies which rose from about 2,000 in 2020 to slightly over 4,000 in 2021 and nearly back to the pre-COVID operational levels as indicated in table 6 below.

Table 6: Kisumu International Airport Passenger Flight Landings



Source KAA

iii. Malindi Airport Flight Passenger Landings

Alongside Moi International Airport, the coastal tourism circuit is supported by three other airports in terms of aviation traffic, namely Malindi Airport, Ukunda Airstrip and Manda Airstrip.

In 2019 prior to onset of the pandemic, Malindi Airport deployed about 2,500 in terms of scheduled passenger flight landings. In terms of scheduled passenger airlines, Malindi was patronized by 5.

In 2020, Malindi only handled about 1,200 passenger flight landings even though the number of scheduled only dropped slightly to 3.

In 2021, Malindi Airport experienced good recoveries in the number of flight landings deployed, reaching almost to the pre-COVID performance levels. It grew its passenger flight landings to 2,400 almost to the same level as in 2019. See table 7.

Table 7: Malindi Airport Passenger Flight Landings



Source KAA

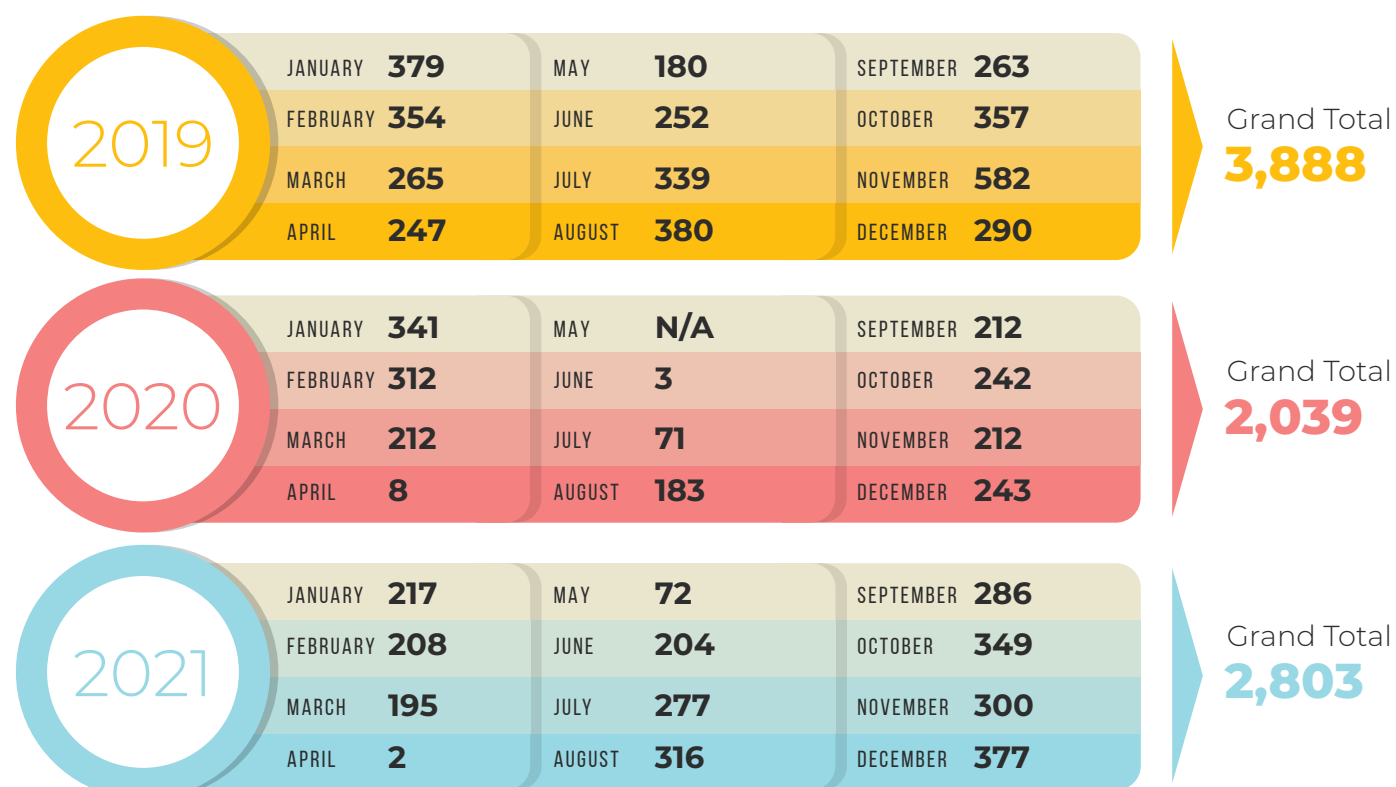
iv. Ukunda Airstrip Flight Passenger Landings

In 2019 prior to onset of the pandemic, Ukunda Airstrip deployed about 3,900 in terms of scheduled passenger flight landings. In terms of scheduled passenger airlines, Ukunda was patronized by 10.

In 2020, Ukunda Airstrip was able to sustain the same number of scheduled operators, albeit with reduced landing frequencies, from about 3,900 in 2019 to slightly over 2,000 landings.

In 2021, Ukunda Airstrip experienced good recoveries in the number of flight landings deployed, reaching almost to the pre-COVID performance levels. In table 8 below, the Airstrip managed to grow its flight landings to slightly over 2,800 from 2,000 in 2020.

Table 8: Ukunda Airstrip Passenger Flight Landings



Source KAA

v. Manda Airstrip Flight Landings

In 2019 prior to onset of the pandemic Manda deployed about 2,100. In terms of scheduled passenger airlines, Manda was patronized by 5.

In 2020, Manda Airstrips was able to retain the same number of operators across the year but with reduced number of frequencies, from 2,100 in 2019 to about 1,100 in 2020.

In 2021, Manda Airstrip was able to recover by over 60% to about 1,800 flight landings as indicated in table 9 below.

Table 9: Manda Airstrip Passenger Flight Landings



Source KAA



03

TOURISM EARNINGS AND LOSSES INCURRED DUE TO COVID-19 PANDEMIC

3.1 Inbound Tourism Earnings

In 2021, inbound tourism earnings grew to KShs. 146,514,060,000 compared to KShs. 88,562,000,000 in 2020 which represents a 65.44% growth, table 10.

Table 10: Inbound Tourism Receipts 2020 to 2021

MONTH	2020	2021
Quarter 1	62,866,000,000	27,137,000,000
Quarter 2	119,000,000	25,456,000,000
Quarter 3	6,573,000,000	45,704,000,000
Quarter 4	19,004,000,000	48,217,060,000
Total	88,562,000,000	146,514,060,000

3.2 Tourism Employment

Direct Impact

The tourism sector offers jobs for both skilled and unskilled personnel. Due to the COVID-19 pandemic, both international and domestic tourism faced near collapse leading to substantial job losses across all tourism

subsectors. Table 11 below gives the extent of job losses in the sector during the pandemic period from onset in March 2020 as well as the resultant losses in labour income.

Table 11: Direct Effects of Losses in Tourism Revenues on Tourism Employment

	ACCOMMODATION	FOOD & DRINKS	PASSENGER TRANSPORT	ATTRACTIONS	SHOPPING	TOTAL
Employment (In thousands)	-295	-162	-216	-24	-486	-1,183
Labour Income Losses (Ksh, millions)	-26,015	-14,298	-63,210	-5,913	-43,000	-152,435

Kenya's tourism sector lost about 1.2 million full time equivalent jobs (permanent and casuals) and Kshs152 billion in labour income.



04 BED NIGHTS AND ROOM OCCUPANCY 2019 – 2021

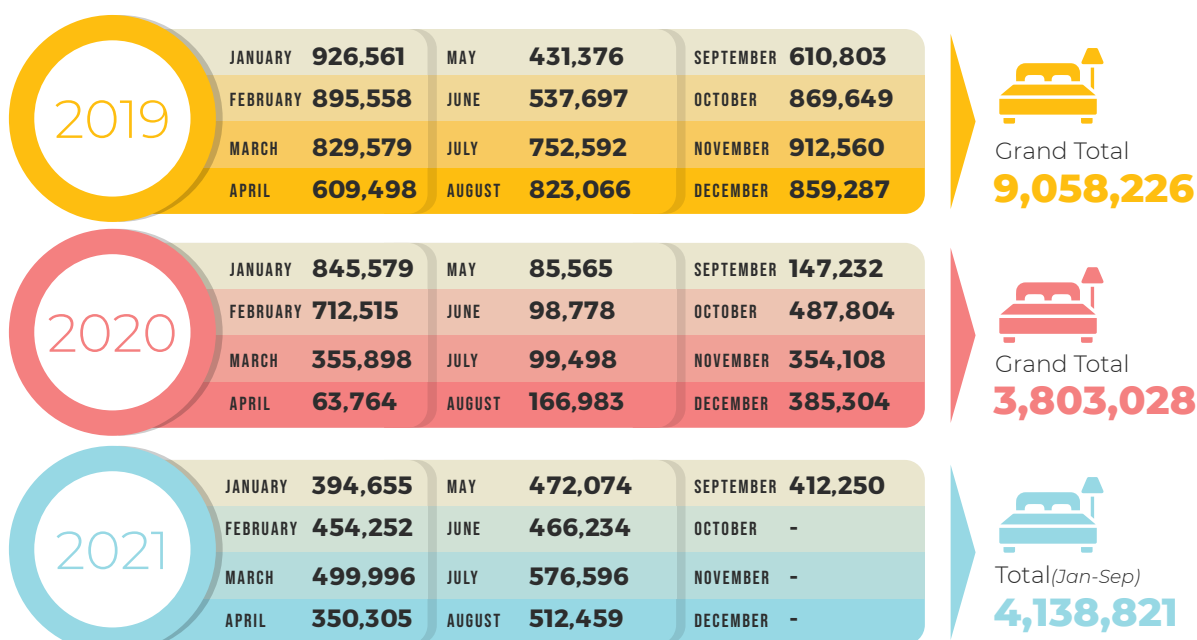
4.1 Bed Night Occupancy 2019 - 2021

In 2019 the total bed night occupancy was 9,058,226 while in 2020 it was 3,803,028. The monthly average occupancy rate in 2019 was thereby 754,852 compared to an average of 316,919; indicating a 58.0% decline in growth. This was attributed to the shutting down of the economy occasioned by international lockdowns

and strict Covid-19 containment measures that made hospitality establishments close temporarily.

In January to September 2021, the bed occupancy increased to total of 4,138,821 as compared to same period in 2020 (2,575,812) recording a recovery of 60.7%, this can be attributed to easing of the containment measures and compliance requirements put in place. See table 12.

Table 12: Total Hotel Beds Occupancy



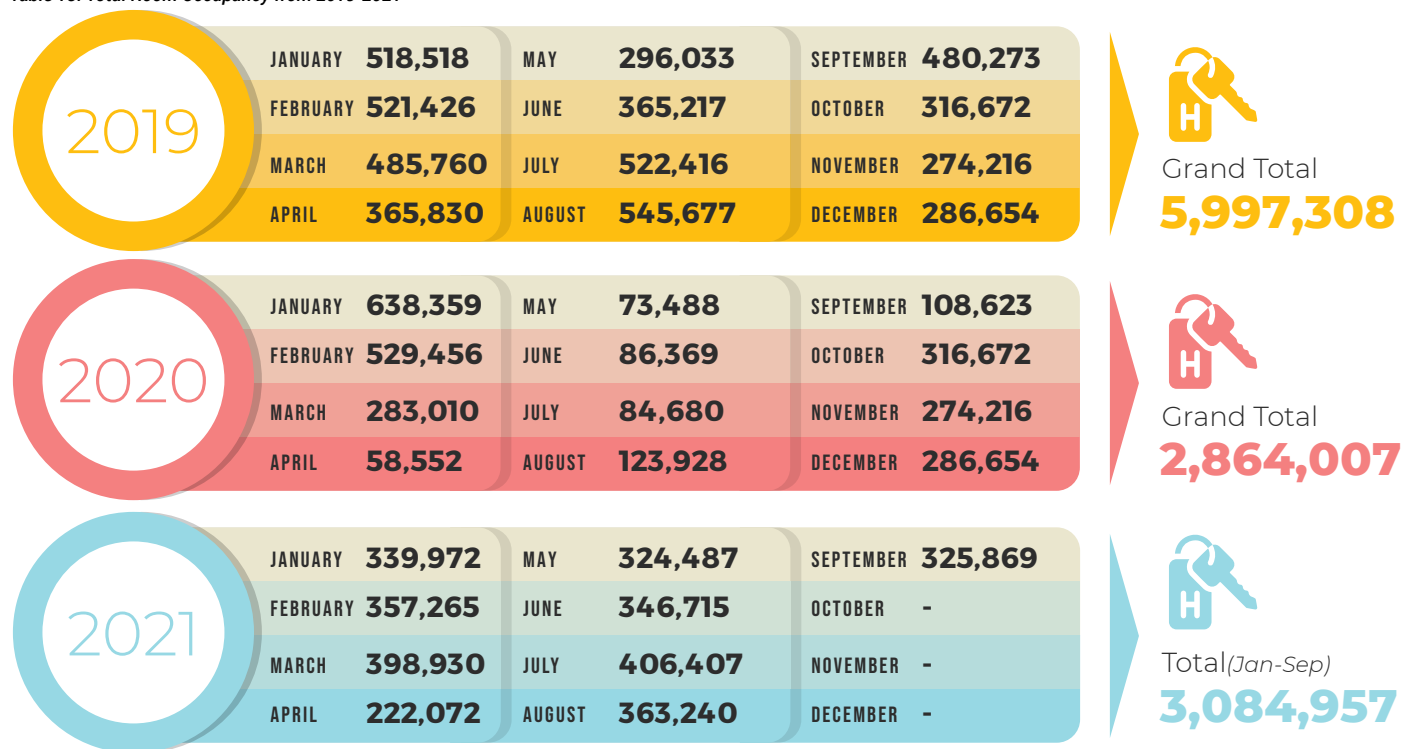
Source KNBS

4.2 Room Occupancy 2019 to 2021

In 2019, room occupancy was 5,997,308 compared to 2,864,007 for 2020, indicating a decline of 52.2%. This was due to cessation of movement in 2020 in specific intercounty. In January up to September, 2021 a positive

growth of 3,084,957 was realized as compared to the same period in 2020(1,986,465) indicating a growth of 55.3% as shown in table 13.

Table 13: Total Room Occupancy from 2019-2021



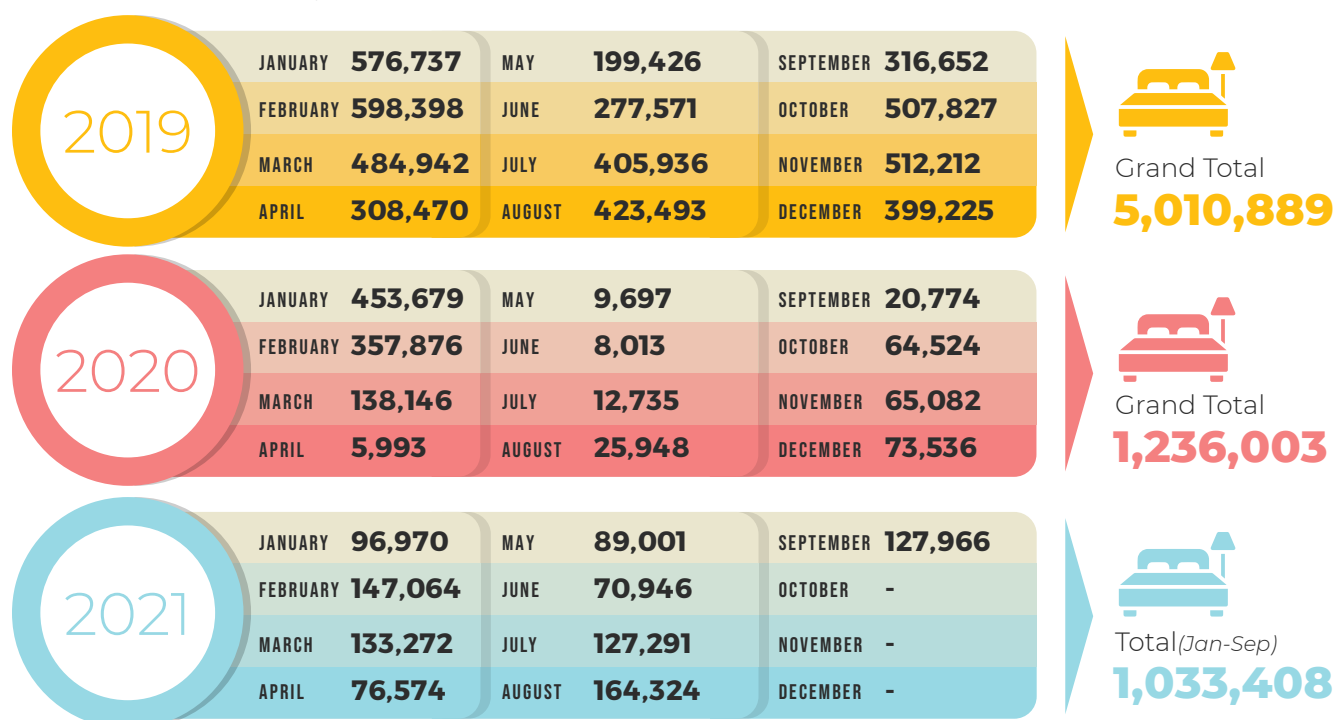
4.3 International Bed Occupancy 2019 - 2021

Due to unprecedented global health, social and economic emergency as occasioned Covid-19 pandemic, travel and tourism has experienced massive fall of international demand amid global travel restrictions to contain the virus. According UNWTO World Tourism Barometer, International tourist arrivals (overnight visitors) fell by 72% in January-October 2020 over the same period last year. This emanated from slow virus containment, low traveler confidence and important restrictions on travel still in place, due to the Covid-19 pandemic which translated in low international bed occupancy uptake.

In 2019, international bed occupancy was 5,010,889 compared to 1,236,003 in 2020, a decline of 75%. In January to September 2021, a slight positive growth was realized with a record of 1,033,408 compared to same period in 2020 (1,032,861). This positive growth of 0.05% was due to liftings cessation of movements and opening the country for international tourists. Table 14.



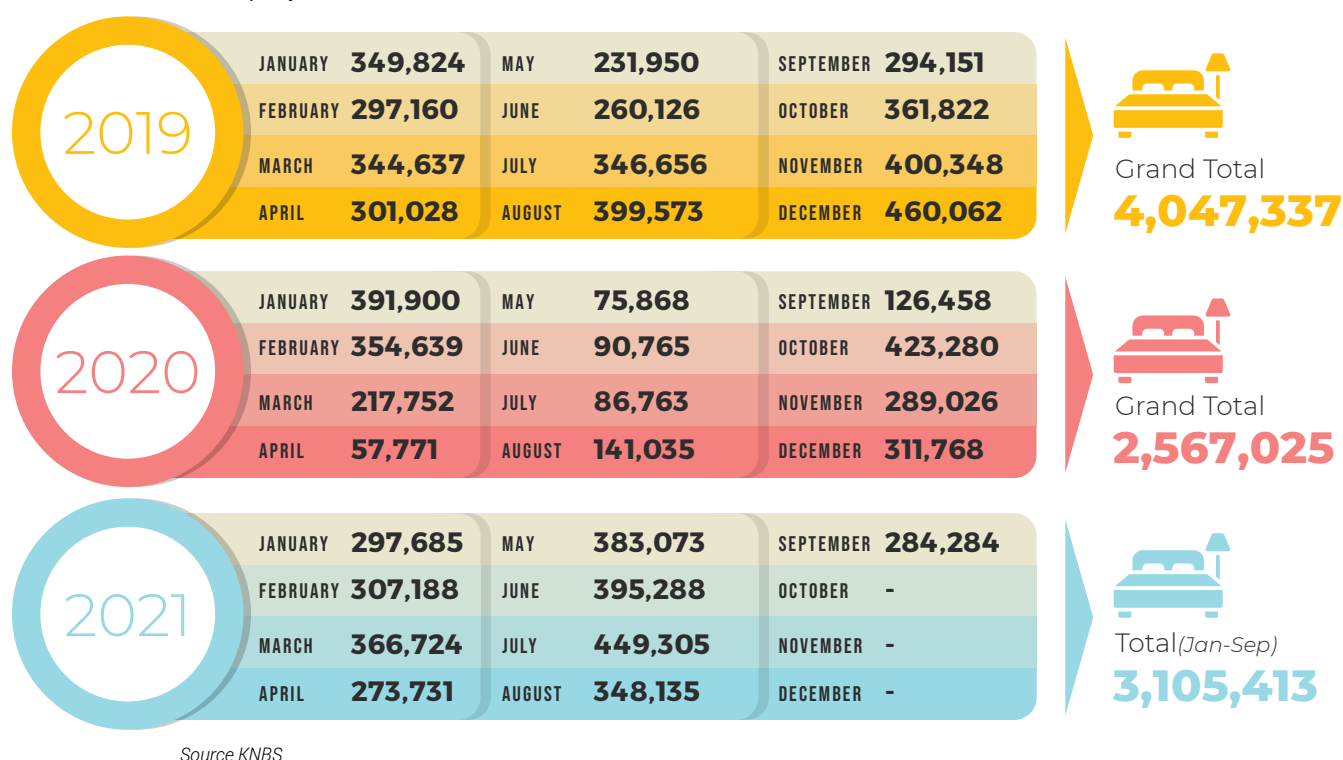
Table 14: Total International Bed Occupancy



4.4 Domestic Bed Occupancy 2019 to 2021

In 2019, domestic bed occupancy was 4,047,337 as compared to 2,567,025 in 2020, a decline of 69%. In January to September, 2021 the domestic bed occupancy grew to 3,105,413 as compared to same period in 2020(1,542,951) indicating an increase of 101.3% as shown in table 15.

Table 15: Total Domestic Bed Occupancy



Domestic bed nights grew by 101.3% between 2020 and 2021 while international bed nights grew by 0.05%. These bed nights recovery trends are an indication that the hospitality sector in Kenya has largely been supported by

domestic travel in 2021. This is in line with the forecast given by UNWTO in September 2020 that recovery of destinations will be driven by domestic markets and various testimonials from sector players attest to this.



05



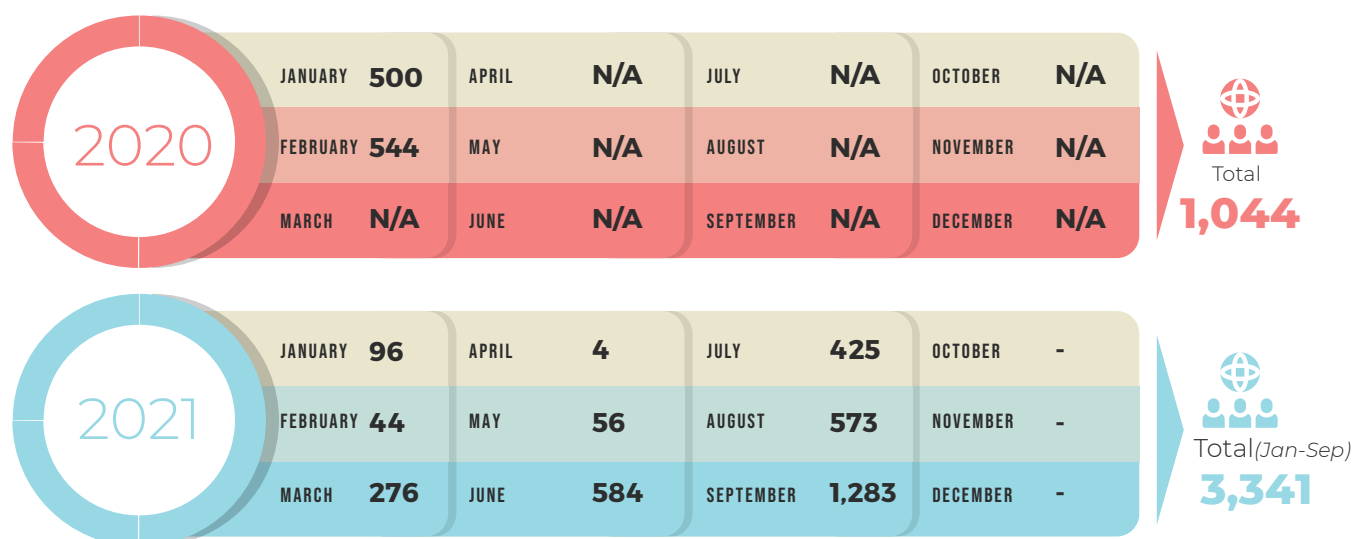
MEETING, INCENTIVES, CONVENTION & EXHIBITION (MICE)

MICE is both a sub-segment of tourism as well as an important part of other broader economic sectors since it plays a key role as an enabler in the achievement of the Big Four Agenda in the Country. The data used covered 2020 up to September, 2021.

5.1 International Delegates

The number of international delegates hosted increased from a total of 1,044 in year 2020 to 3,341 in 2021 occasioned by lifting up of cessation of movements across all countries due to the pandemic and resumption of flights as shown in table 16.

Table 16: Number of International Delegates

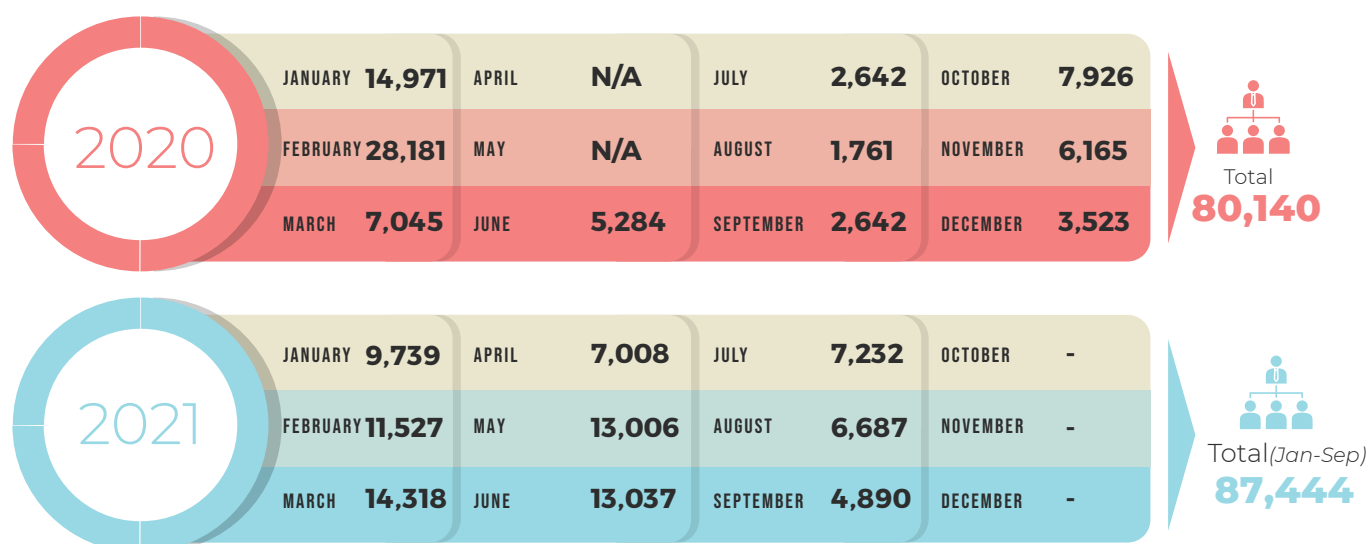


Source KNBS

5.2 Local Delegates

The number of Local delegates hosted showed an increase of 39.9% in January to September 2021, (87,444) compared to same period in 2020 (62,526) as indicated in table 17.

Table 17: Number Local Delegates



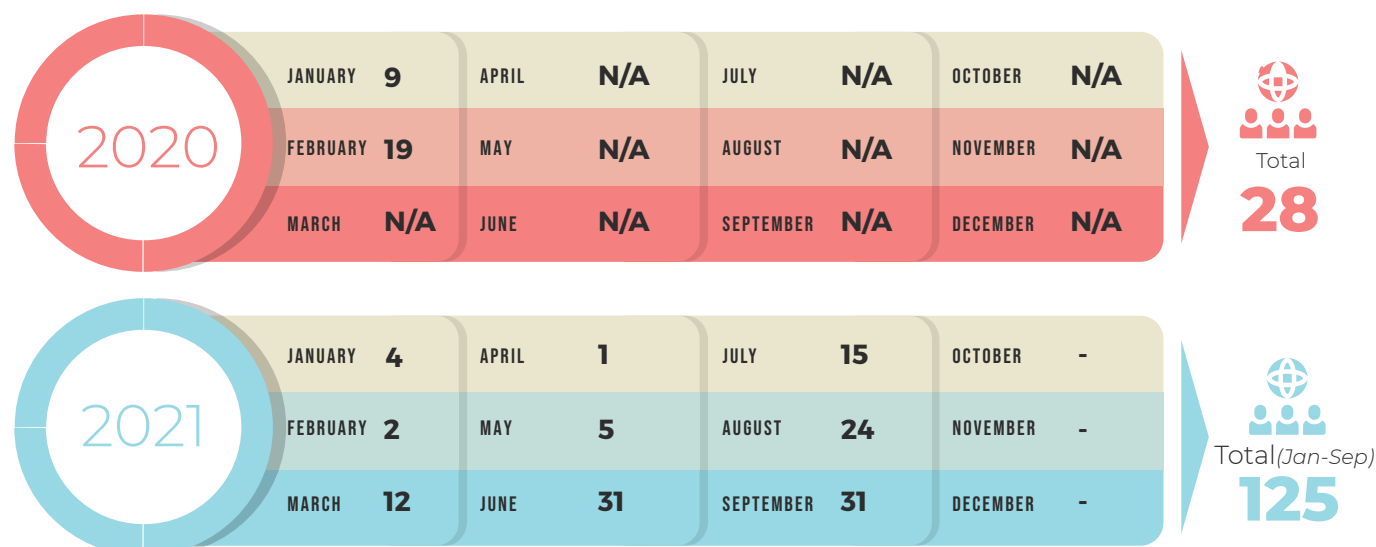
Source KNBS

5.3 International Conferences

The Covid-19 pandemic had a negative impact on the MICE where during the period between the year 2020 and 2021 the cessation of movements, stay at home campaigns and suspension of international flights affected number

of conferences held in the country. In 2021, the number of international conferences increased to a total of 125 against 28 in 2020, see table, 18.

Table 18: Number of International Conferences Held



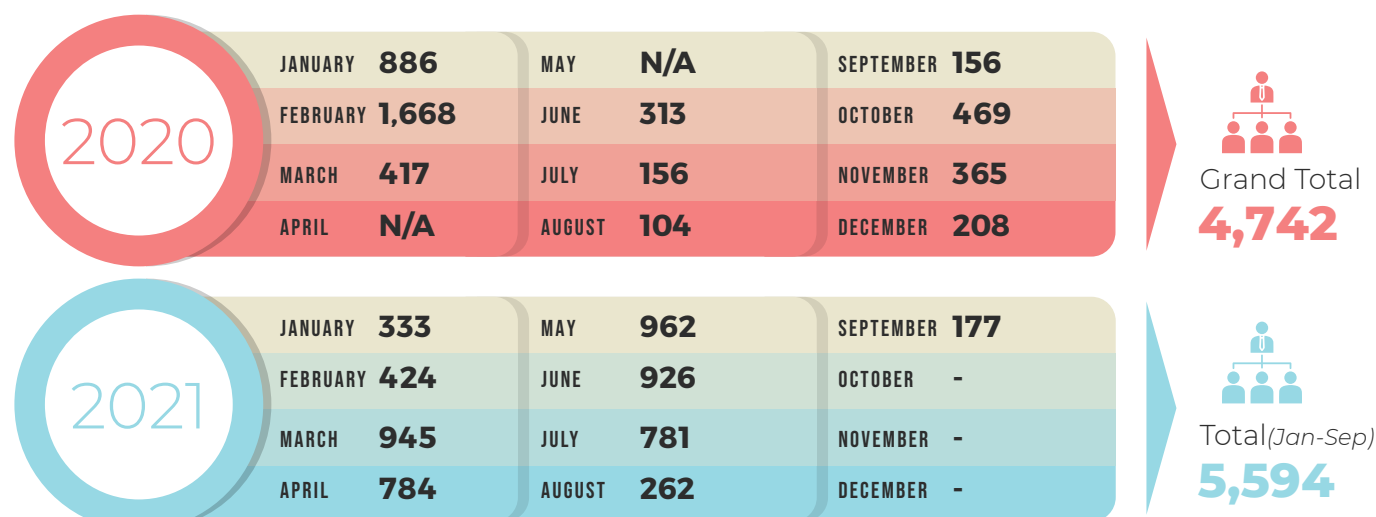
Source KNBS

5.4 Local Conferences

The trend of local conference hosted indicates that in January to September, 2021 5,594 local conferences were held as compared to 3,700 in 2020 the same period.

Indicating a growth of 51.2% which can be attributed to the introduction of incentives and strategies as indicated in Table 19.

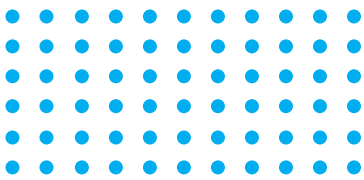
Table 19: Number of Local Conferences Held



Source KNBS



INITIATIVES THAT SUPPORTED SECTOR RECOVERY IN 2021



06

The Covid-19 pandemic has continued to pose a challenge in destination marketing programs but all efforts have pulled towards keeping the destination relevant in the market as a way of keeping travellers interested. Key has been the call to travellers to experience Kenya's magic, while at the same time assuring them of their health and safety while here.

i) Destination Campaigns

Key Destination Campaigns have continued to keep the global eyeballs on Magical Kenya, demonstrating the resilience of the destination. In this respect, innovations have been key with new experiences that are in line with the current Travellers' demands gaining focus. Domestic campaigns that run during the pandemic season included Kenya Inanitosha, **#Stay-at-home-travel-tomorrow** in support of the call by UNWTO which empathised with travellers around the world and **#MagicAwaits**.

Other consumer campaigns included partnerships with Expedia and Qatar Airways in Northern America, Lastminute.com covering key source markets, trade incentive campaigns in UK and North America and familiarization trips aimed at increasing confidence in the destination.



ii) Events Hosted Within the Pandemic Period

Kenya has had an opportunity to host key events activated mainly through branding and live television thus giving the destination visibility both locally and internationally. Key events included: Magical Kenya Open, World Rally Championship – Safari Rally, World Athletics Under 20 and participation in the Tokyo Olympics. Besides these consumer events, such as WTM Africa, Magical Kenya Travel Expo and ITB which were held virtually.

The destination leveraging on wildlife conservation saw the initiation of the debut MagicalKenya *Tembo* Naming Festival. The festival was expected to pull resources for the conservation of elephants. Through the program, both individuals and organizations adopted and named an elephant after contributing towards conservation efforts. Enhanced conservations efforts also saw the destination

activating its campaign on the conservation of wildlife heritage through branding of KQ aircraft flying into 41 destinations with iconic species such as lions, rhinos and elephants.

Cultural tourism in Kenya avails travellers an opportunity to interact with the rich culture of the Kenyan people. Culture remains a key reason for travellers to explore long haul destinations such as Kenya. The centralised showcase of culture is by the Bomas of Kenya. Cultural experiences are also available through interactions with varied communities through festivals like the Rusinga, Turkana and Lamu cultural festivals among others. Some of the festivals however like Lamu have been on a break due to the pandemic.

iii) Kenya's Strategic Location

Destination Kenya continues to gain from this strategic location as a global and regional air transport hub hence the sustained resumption of flights by major global airlines.

Iv) Key Anchor Projects Propelling the Economy And Supporting Tourism

A number of strategic infrastructure projects have eased access to various areas of interest within the country thereby enriching the experience of both international and domestic travellers and giving Kenya a competitive edge. They include:

- **Revival of the Nairobi** - Nanyuki and Nairobi - Kisumu train service that has enhanced travel to these two circuits in central and western Kenya respectively.
- **Increased frequencies** of the SGR Madaraka Express between Nairobi and Mombasa with a number of

tourism facilities at the Coast and along the SGR route creating innovative packages around the SGR service.

- **Construction and expansion** of major roads all around the country continue to ease and offer varied options for access of attraction sites and new tourist circuits.
- **Refurbishing** most airport infrastructure and the key in bound entry points of JKIA and MIAM.

V) Sector Initiatives and Innovations

Some private sector players have developed and implemented innovative initiatives to revitalise their businesses and improve the visitors' experiences. Such initiatives continue to aid the recovery of the sector and they include:

- **Entry of new domestic airlines** and launch of new air routes such as Kisumu – Mombasa.
- **Accommodation and conference** facilities are constantly being improved all over the country,

operating under the health protocols and adopting to hosting hybrid meetings.

- **Innovations** around holiday packages and pricing tailored to meet the needs of the new domestic traveller and improve on their facilities and product offerings to attract more travellers into the destination.

vi) New Vision Strategy for Kenya Tourism

To respond to the pandemic and chart a new ambitious vision for rebuilding the sector, the Ministry of Tourism and Wildlife developed the above Strategy with an aim of transforming the sector across the following areas;

- i. Rebranding Kenya as a tourism destination,
- ii. Marketing Kenya as destination to high priority source markets to best capture inbound and domestic tourists,
- iii. Revitalizing the products and experiences offered to tourists, and

- iv. Better utilization of critical enablers such as digitization, sustainable tourism, and innovative finance.

Implementation of the Strategy commenced in Q3 of 2021 and is already bearing fruits in terms of Magical Kenya brand presence and improved visitor experience in key attraction areas. More gains will be realised in 2022/23 when most of the strategy's targets will be rolled out and tested.





07



PERFORMANCE IN TOURISM TRAINING

The number of trainees pursuing regular programs in hospitality and tourism courses at the Kenya Utalii College declined from 2706 in 2019 to 264 in 2020. The year 2020 admission was seriously affected by the Covid-19 pandemic. The college did not offer Refresher and Management Development Programs (MDP) in the

year 2020. In the year 2021 about a total of 708 students were admitted as compared to only 264 in 2020 which was an increase in comparison to the previous year but a big decline when compared to pre- Covid-19 year which had 2,706 students. No students were admitted for the Management Development programs. See table 20.

Table 20: Hospitality Training Performance

		IN-SERVICE			PROFESSIONAL COURSES			
		Pioneer	Refresher	MPD	Regular Courses	Short Courses	Subtotal	
2018	231	1130	253	229	622	851	2465	Grand Total
2019	212	1313	267	259	655	914	2706	Grand Total
2020	N/A	N/A	N/A	264	N/A	264	264	Grand Total
2021	N/A	131	N/A	293	284	708	708	Grand Total

Source: Utalii College



08

KEY HIGHLIGHTS FROM WILDLIFE SECTOR



The sector performance for the year 2021 is as shown below, in terms of visitors and revenue collected, wildlife security, human wildlife conflicts and wildlife census.

8.1 Visitors and Revenue Performance

i. Visitation

In 2021, a total of 1,286,028 persons visited our tourist facilities, which was a 41% increase compared to year 2020 (913,052). However, in comparison to 2019 it was still 43% below (2,276,114).

In the international sector (Non-residents), 196,474 visited our tourist facilities in 2021 which was a 19% increase

compared to year 2020 (165,678). However, in comparison to 2019 it was below by 67% (601,051). For the domestic market (Citizens and Residents), 2021 recorded 1,089,554 visitors, which was a 46% increase compared to year 2020 (747,374). Compared to 2019, it was still below by 35% (1,675,063).

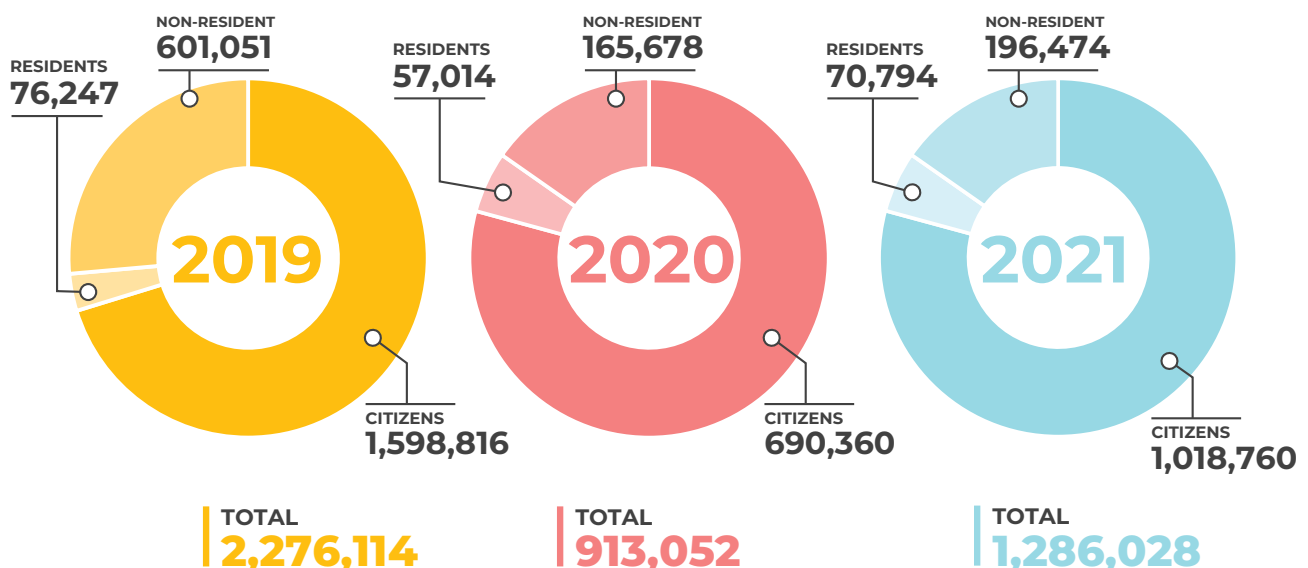


Figure 9: KWS Visitation Numbers

Source KWS

ii. Revenue Performance

Gates revenue collected in 2021 was **KES. 1,485,398,438.00** which reflects a **40%** increase (1,059,235,504.00) when compared to Year 2020. In comparison to 2019 it's still a below by 66% (4,372,923,921.00). The figure 10 below reflects the monthly trends:

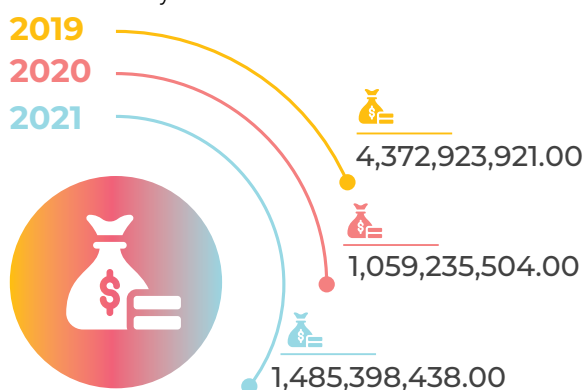


Figure 10: KWS Revenues

Source KWS



8.2 Wildlife Security

Wildlife insecurity in Kenya has been characterized by poaching, illicit wildlife trade, commercial poaching for bushmeat and destruction of habitats. While the illegal killing of elephants and rhinos for illegal trade in ivory

and rhino horn has largely been contained, the rise of commercial poaching for bush meat is emerging as a serious threat to species survival.

i) Elephant Poaching

During the year, twenty-four (24) elephants were poached as compared to 11 the year in 2020. While elephant poaching has been brought in control, retaliatory killings of elephants due to Human-Elephant Conflict (HEC) is on the rise with 108 elephants having been killed as a result.

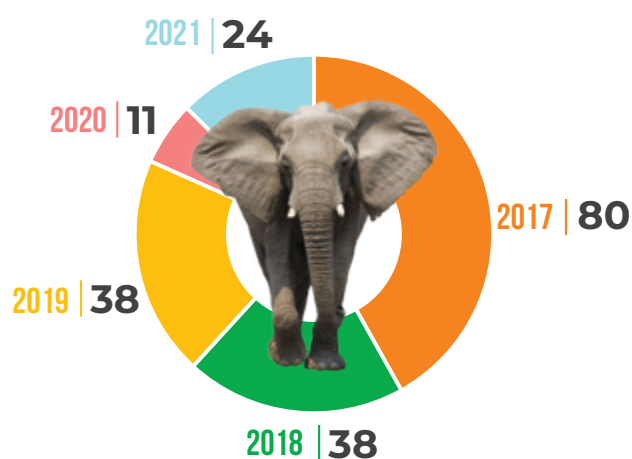


Figure 11: Elephant Poaching (2017-2021)

Source KWS

NB. Elephant Mortality data for 2021 is PROVISIONAL awaiting data harmonization exercise. The final figure will be released once the Harmonization results are adopted as per procedure.

ii) Rhino Poaching

Six (6) rhinos were poached during the year 2021 as compared to zero in 2020 as given in figure 12 which was an increase. The poaching was one in Ruma National Park and five in Solio Rhino Sanctuary.

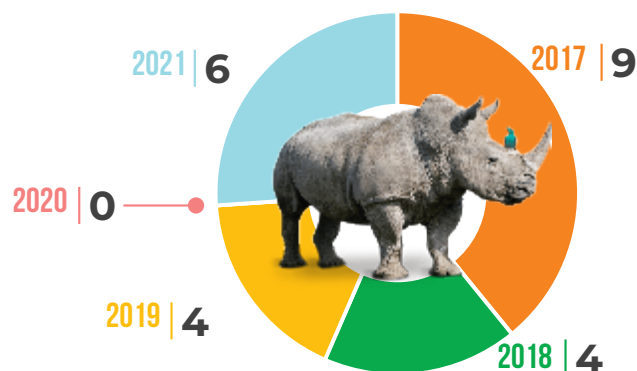


Figure 12: Rhino Poaching

Source KWS

iii) Bushmeat Poaching

In Kenya there has been an increase in bush meat poaching for the last 7 years. In the year under review 13,304 kg of bush meat was recovered as compared to 9398kg in 2020. This was a 41% increase as given in figure 13

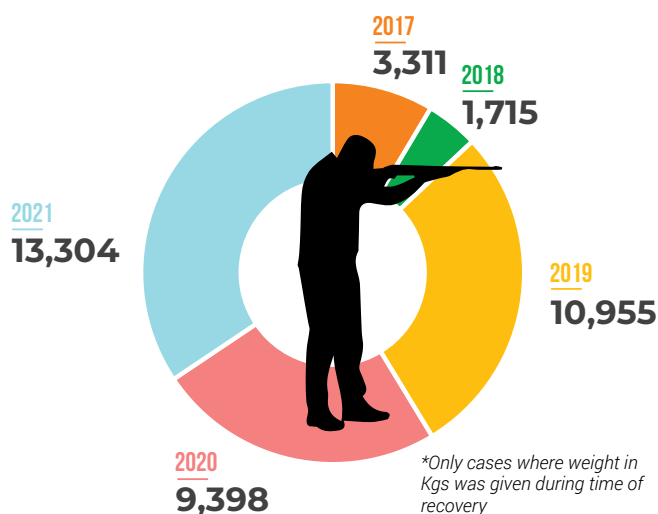


Figure 13: Bushmeat Recovery (2017-2021)

Source KWS



8.3 Human Wildlife Conflicts

Human-Wildlife Conflicts (HWC) remains an incessant problem in Kenya. The conflicts are manifested through human deaths and injuries, livestock depredation, crop and property damage, spread of zoonotic and vector-borne diseases and disruption of socio-economic activities, with ramifications on wildlife conservation and management efforts. Factors promoting HWC includes: increased human population, lack of spatial land use plans and a national land use policy, climate change issues and inadequate resources to address wildlife management issues. Annual HWC trends fluctuate mainly due to factors related to climate change. A comparative analysis of conflict cases for the last three years is as shown in figure 14. During the year 2021, a total of 4,745 cases of HWC incidences were

reported across the Country, compared to 5865 cases in 2020, representing a 23% decrease. To mitigate HWCs and reduce the negative impacts on human co-existence, the Government implemented several mitigation measures during the reporting period, which includes new fences, deployment of modern technology and payment of compensation to victims of Human wildlife conflicts among others. In the year 2021, Government released a total of KSh. 1,053,298,000.00 towards payment of approved HWC compensation claims of 71 human deaths, 2,796 injuries, 91,147 livestock predations, 1,676 Crop damages and 4 property destruction claims experienced in the Country.

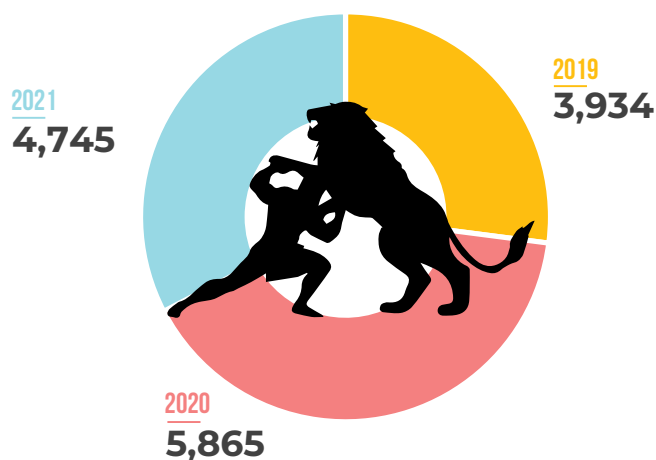


Figure 14: HWC Numbers from 2019 to 2021

Source KWS



8.4 Wildlife Census

The census covered over 343,380km² (total aerial = 186,296km² and sample aerial = 157,084km²). This represents 59% of Kenya's land mass. A total of 1158.23 hours was flown (940.80 hours and 217.43 hours for total and sample aerial censuses respectively).

Over 30 species of mammals, birds and marine species were counted in various ecosystems during the census. Some of the iconic species counted were elephants (n=36,280), black rhino (n=897), white rhino (n=842), northern rhino (n=2), lions (n=2,589), hyenas (n=5,189), Cheetahs (n=1,160), wild dogs (n=865), buffalo (n=41,659), Maasai giraffe (n=13,530), reticulated giraffe (n=19,725), Nubian's giraffe (n=938), common zebra (n=121,911), Grevy's zebra (n=2,649), eland (n=13,581), hartebeest (n=7,332), wildebeest (n=57,813), Grant's gazelle

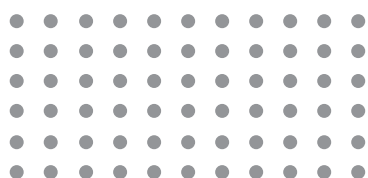
(n=66,709), Thomson's gazelle (n=18,277), hirola (n=497), topi (n=8,627), impala (n=25,541), oryx (n=11,765), kudu (n=2,524), gerenuk (n=13,400), waterbuck (n=1,071), warthog (n=8,013), hippo (n=1,788), Maasai Ostrich (n=2,354), Somali Ostrich (n=6,483), roan antelope (n=15), sable antelope (n=51), Mountain bongo (n=150), Sitatunga (n=473), Tana river Mangabey monkey (n=1,650) and Tana river red colobus monkey (n=1,219), among other terrestrial species.

The census recorded an increase on some of the charismatic species such as: elephants, rhinos, lions, giraffe, Grevy's zebra, hirola among others and established baseline number for other species. However, there was relatively lower records of the plain game species.





PERFORMANCE PROJECTIONS FOR 2022.



09




The Kenyan economy is projected to increase its annual growth rate from 5.0% in 2021 to 5.9% in 2022 reflecting an increase of 18%. The resumption of normal economic activities and reopening of the economy in addition to implementation of the Economic Recovery Strategy are expected to improve in external liquidity thus increasing growth in the economy.

On the other hand, inflation is projected to remain within the Central Bank of Kenya's target range of 2.5% to 7.5%, whereas fiscal and current account deficits are expected to reduce due to increased revenue collection and exports. Among the negative effects are forecasted delay in the full reopening of the economy, failure to secure external financing to execute the budget, a slowdown in global growth, and disruptive social conditions brought about by the run-up to the 2022 elections. (African Economic Outlook (AEO) 2021). Even in the face of this prevailing circumstances, the implementation of the New Vision Strategy for Kenya Tourism is expected to start bearing returns starting 2022, hence significantly supporting sector recovery.

This recovery projections analysis adopted the African Economic Outlook (AEO) 2021 projections to analyze the forecasted growth of tourism in Kenya on quarterly basis. The variables used in the forecasting include visitors' arrivals, inbound receipts and passenger flights landings as indicated in Table 21 below:

REDISCOVER THE MAGIC

Table 21: Forecast Data Based on Quarterly Period Year 2022

	DURATION	2020 ACTUAL	2021 ACTUAL	2022 FORECAST
	Quarter 1	20,842	12,818	15,125
	Quarter 2	809	9,787	11,549
	Quarter 3	7,062	17,474	20,619
	Quarter 4	12,602	19,407	22,900
	Passenger Flight Landings	Total 41,315	Total 59,486	Total 70,193
	Quarter 1	389,590	157,702	186,088
	Quarter 2	745	147,933	174,561
	Quarter 3	40,743	265,602	313,410
	Quarter 4	136,770	299,230	353,091
	Visitors Arrivals	Total 567,848	Total 870,467	Total 1,027,151
	Quarter 1	62,866,000,000	27,137,000,000	32,021,660,000
	Quarter 2	119,000,000	25,456,000,000	30,038,080,000
	Quarter 3	6,573,000,000	45,704,000,000	53,930,720,000
	Quarter 4	19,004,000,000	48,217,060,000	56,896,130,800
	Inbound Receipts	Total 88,562,000,000	Total 146,514,060,000	Total 172,886,590,000



10 RECOMMENDATIONS FOR FUTURE GROWTH

10.1 Expand Kenya's Aviation Industry

The aviation industry is paramount for tourism to grow as this annual performance report indicates. Further, Kenya's position as an aviation hub for the region needs to be safeguarded by ensuring maintenance of global standards in infrastructure and continuous improvements in service delivery. JKIA particularly needs a modern international facility that delivers an efficient and friendly customer experience. A number of competing

destinations have expanded and modernized their airports for example, Ethiopia, Tanzania and Uganda hence Kenya needs to affirm its leadership position. There is also urgent need to expand Ukunda and Malindi Airports as indicated in this report for the efficient service of both international and domestic visitors.

10.2 Development for MICE

This report indicates that 26.4% of 2021 arrivals visited the country for business and MICE, this shows that the country has potential for business tourism therefore there is need to develop a new, modern, high capacity and adaptive convention centre.

Destination Kenya is in need of ultra-modern convention centres with adequate capacity to increase competitiveness in this ever-growing segment.

10.3 Focus on Untapped Markets

This report shows that some of the markets that have previously not ranked very highly have potential to grow tremendously as we pursue full recover. These include France, Sweden, Poland,

Mexico, Israel, Iran, Australia, Switzerland, Netherlands and Belgium









REPUBLIC OF KENYA

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