



# Tourism Performance Report 2020





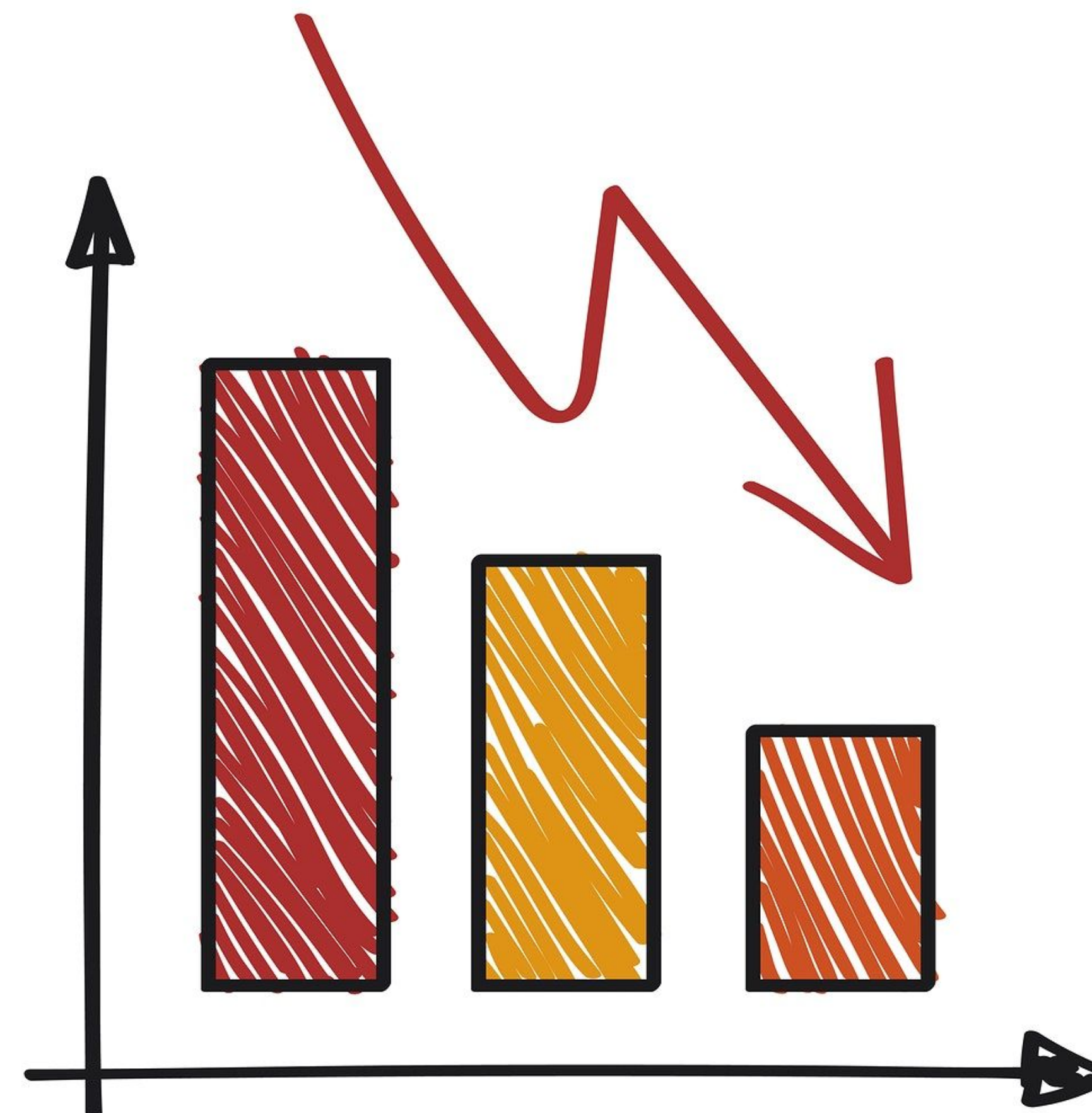
# Table of Contents

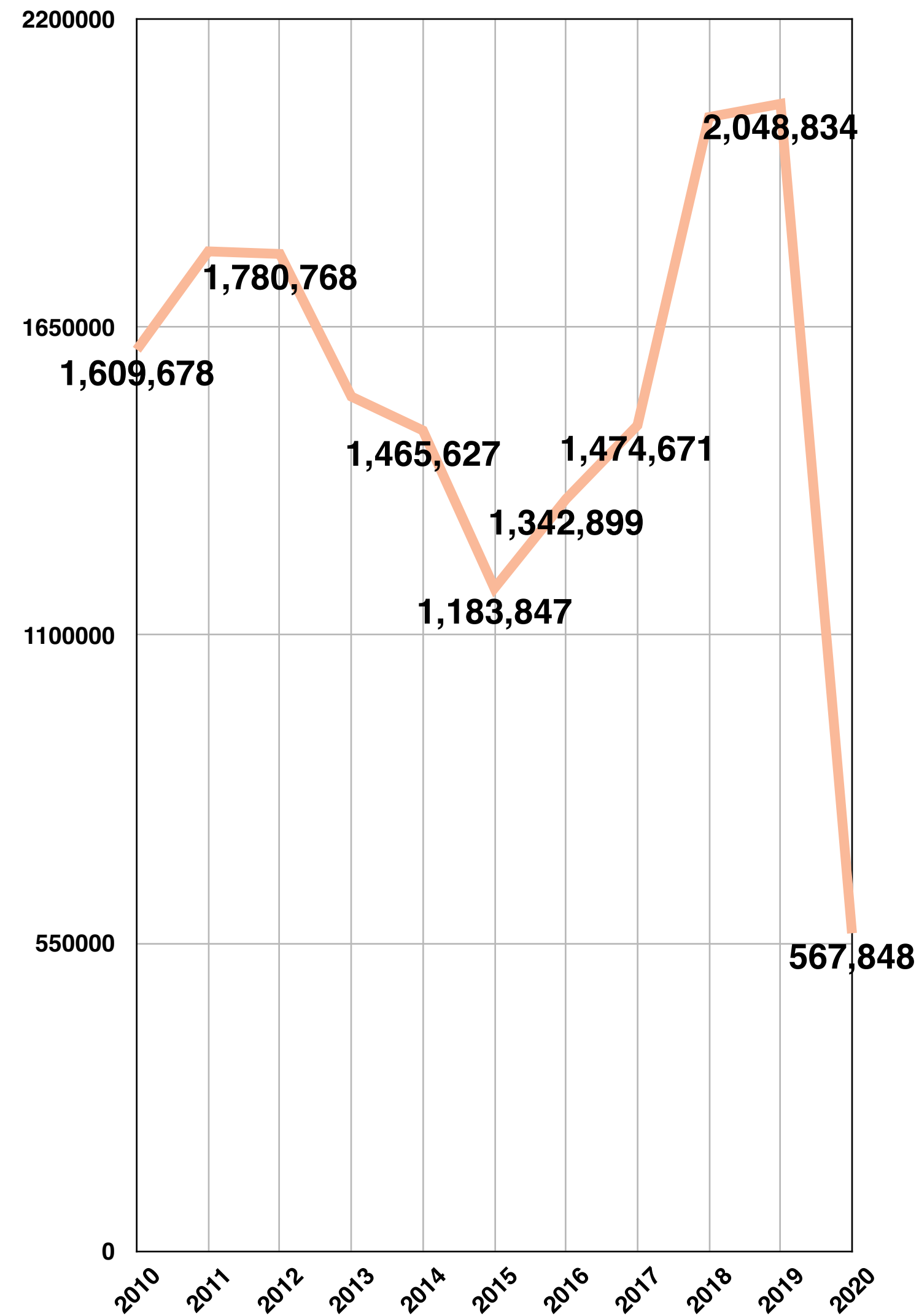


Global Performance Outlook.	03
International Arrivals.	04
Arrivals by Points of Entry.	05
Source Markets Performance.	07
Market Regions Performance.	09
Purpose of Visit.	10
Domestic Tourism Performance.	12
Tourism Earnings – Receipts from International Tourism.	12
Global Travel and Tourism Trends.	13
Projected Trends for Destination Kenya.	14
Projection Outlook.	15

# Global Performance Outlook

According to UNWTO World Tourism Barometer of December 2020, international tourist arrivals (overnight visitors) globally were expected to decline by between 70% and 75% in 2020 in comparison to 2019. This takes us back to the arrivals levels of 30 years ago. The decline in the first ten months of the year represented 900 million fewer international tourist arrivals compared to the same period in 2019, and translates into a loss of US\$ 935 billion in export revenues from international tourism, more than 10 times the loss in 2009 under the impact of the global economic crisis. UNWTO December Barometer. The Barometer further projected a total loss for the year of US\$1.1 trillion in international tourism receipts. This is a 74.3% decline as worked out against the US\$1.48 trillion realized in 2019.





## International Arrivals

For the destination Kenya, international arrivals from January to December 2020 closed at 567,848 which is a reduction of 72.3% when compared to 2019 performance when arrivals closed at 2,048,834. The table below gives a synopsis of the performance over the last 10 years.

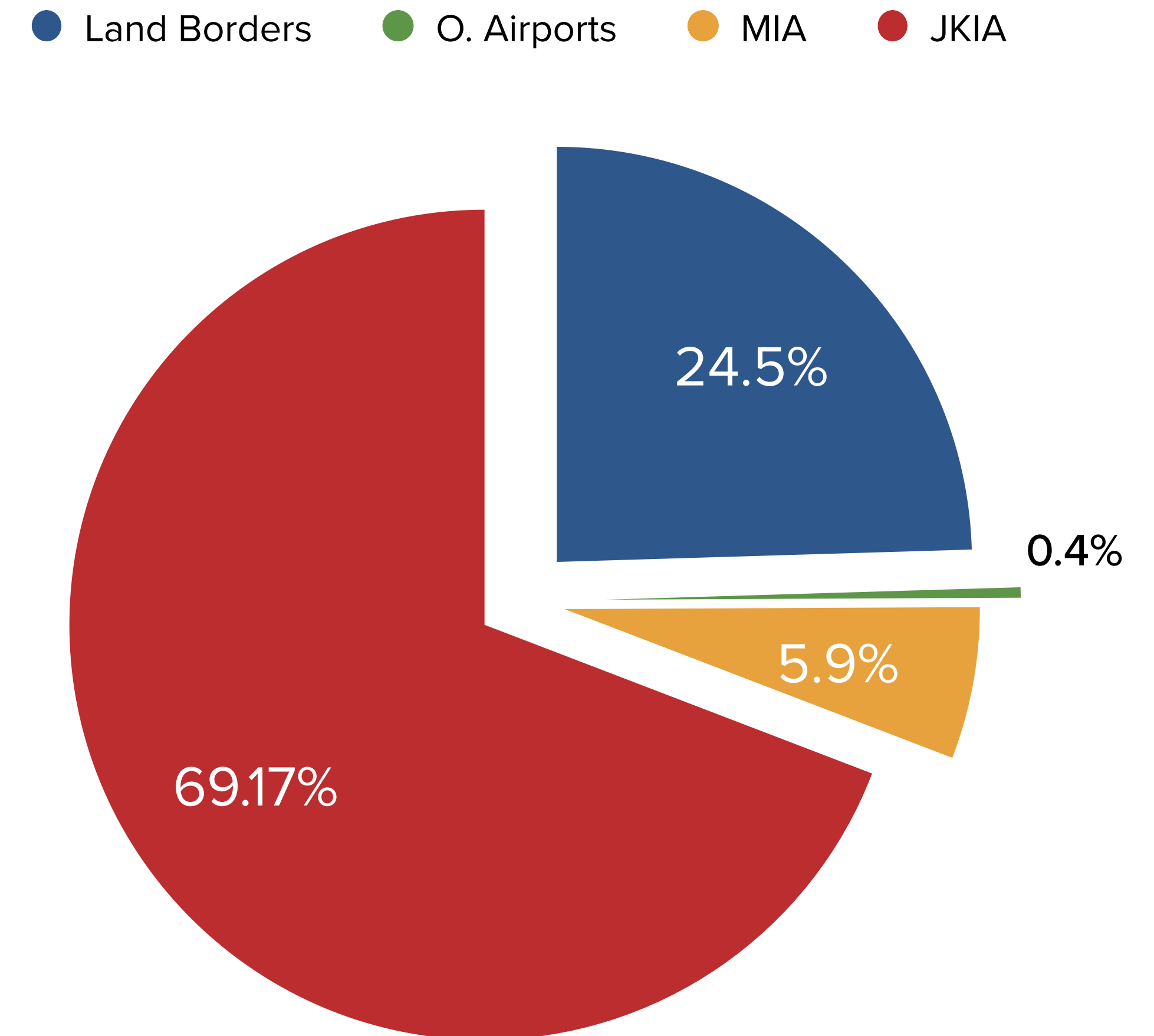
Total Tourism Arrivals 2010 - 2020		
Year	Total Arrivals	% Change
2010	1609678	
2011	1785382	10.9
2012	1780768	-0.3
2013	1526112	-14.3
2014	1465627	-4
2015	1183847	-19.2
2016	1342899	13.4
2017	1474671	9.8
2018	2025206	37.3
2019	2048834	1.167
2020	567848	-72.3



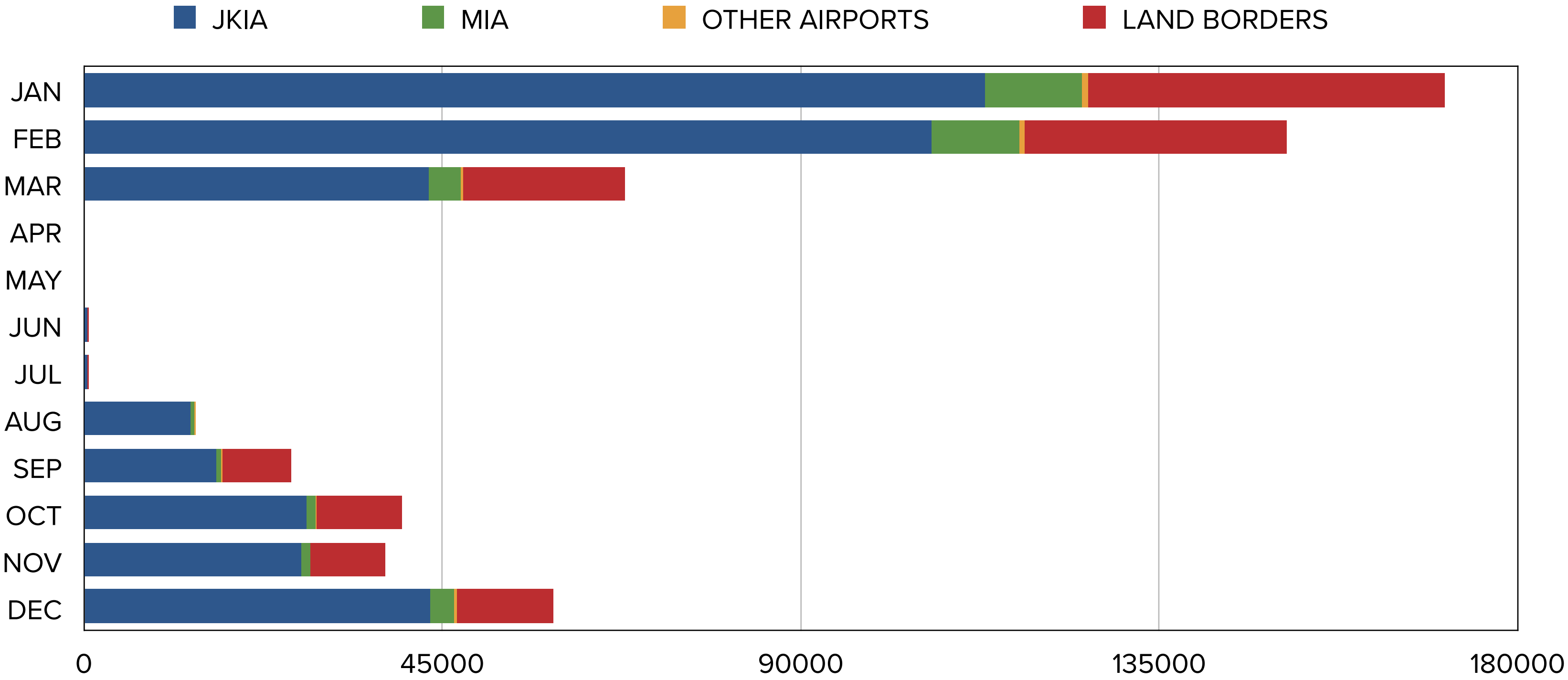
## Arrivals by Points of Entry

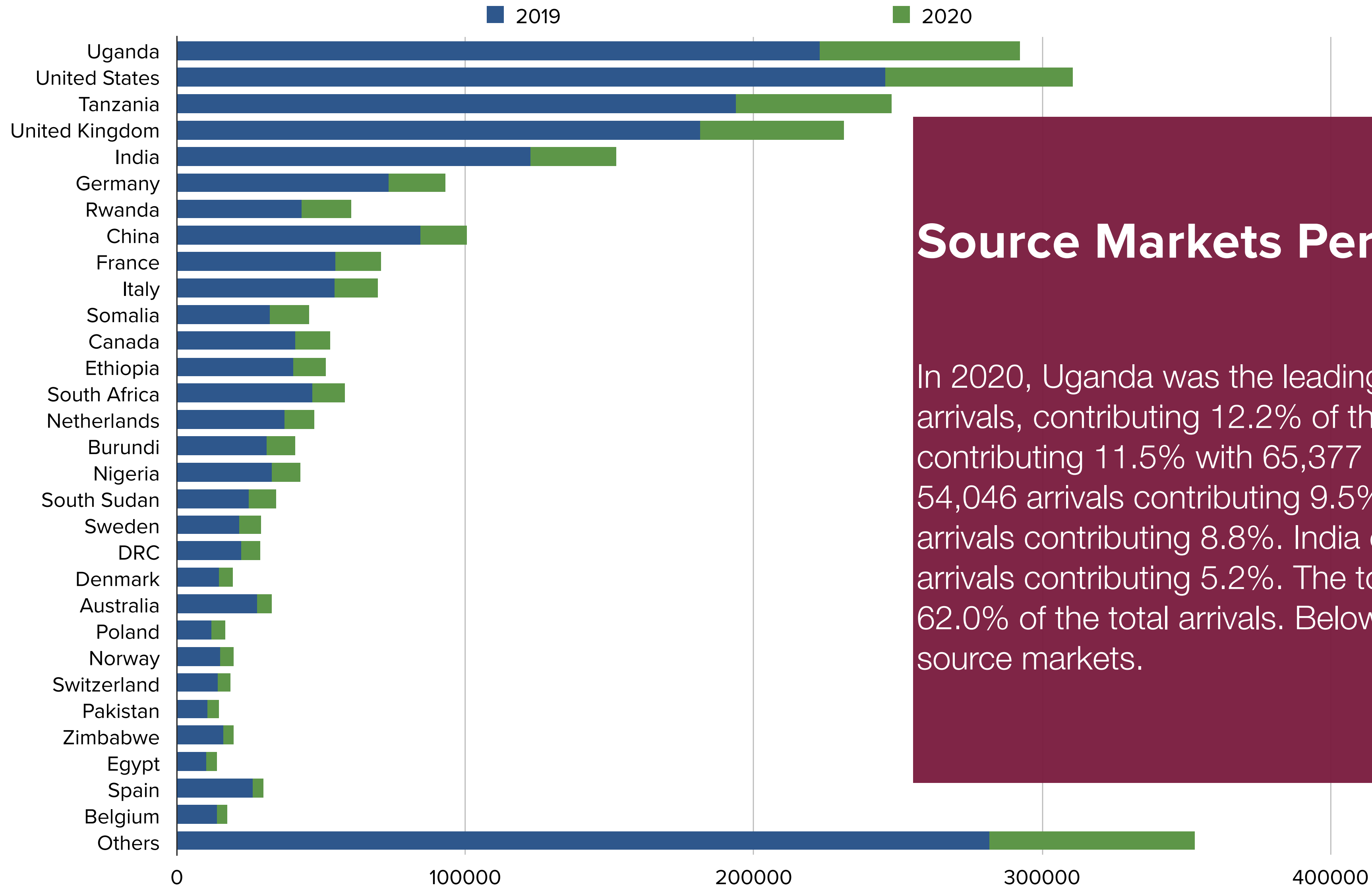
The arrivals by entry points are as here below:

- JKIA arrivals closed at 392,363 in 2020 from 1,423,971 in 2019 representing a decline of -72.4%
- MIAM arrivals for the period closed at 33,785 in 2020 from 128,222 in 2019, a decline of -73.7%
- Other airports for the period closed at 2,465 down from 29,462 in 2019. This is a decline of -91.6%
- Land borders arrivals closed at 139,692 in 2020 down from 467,180 in 2019 indicating a decline of -70.1%.



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	% Contribution
JKIA	113,078	106,345	43,346	8	93	440	467	13,371	16,565	27,933	27,311	43,406	392,363	69.1
MIA	12,205	11,086	3,950			2	1	548	662	1,179	1,040	3,113	33,785	5.9
Other Airports	773	641	239	9	14	32	36	130	113	136	103	239	2,465	0.4
land Borders	44,747	32,896	20,284	10	30	107	171	-	8,679	10,646	9,431	12,234	139,234	24.5
	170,803	150,968	67,819	27	137	581	675	14,049	26,018	39,894	37,885	58,992	567,848	





## Source Markets Performance

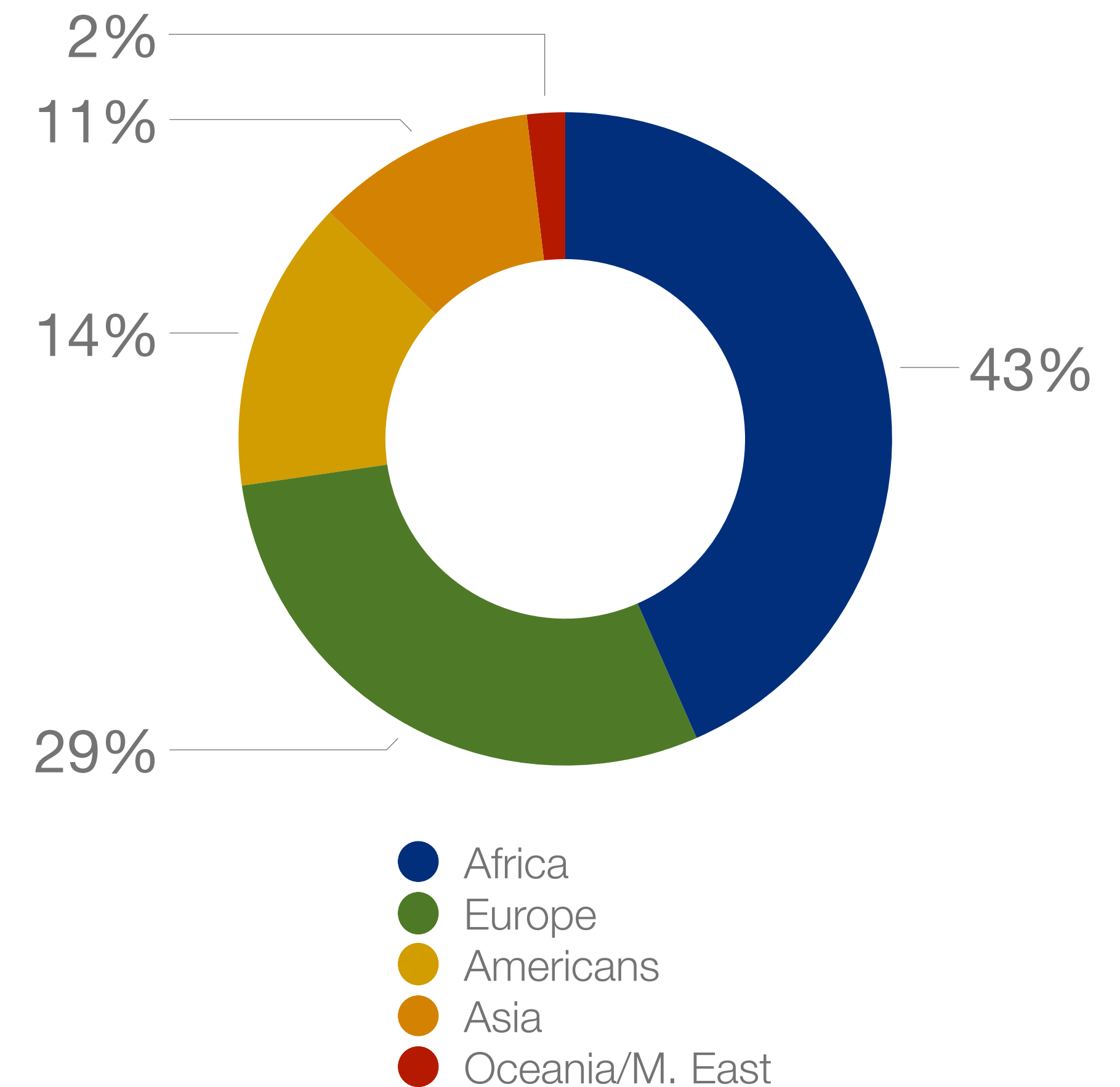
In 2020, Uganda was the leading source market with 69,378 arrivals, contributing 12.2% of the total arrivals. USA was 2<sup>nd</sup> contributing 11.5% with 65,377 arrivals, Tanzania was 3<sup>rd</sup> with 54,046 arrivals contributing 9.5%. UK was fourth with 49,828 arrivals contributing 8.8%. India closed the top 5 with 29,746 arrivals contributing 5.2%. The top 10 source markets contributed 62.0% of the total arrivals. Below is the ranking of the top 30 source markets.

	2019	2020	YoY% Change	% Market Share
Uganda	223,010	69,378	-68.9	12.2
United States	245,437	65,377	-73.4	11.5
Tanzania	193,740	54,046	-72.1	9.5
United Kingdom	181,484	49,828	-72.5	8.8
India	122,649	29,746	-75.7	5.2
Germany	73,150	19,833	-72.9	3.5
Rwanda	43,321	17,043	-60.7	3.0
China	84,208	16,329	-80.6	2.9
France	54,979	15,590	-71.6	2.7
Italy	54,607	15,040	-72.5	2.6
Somalia	32,268	13,390	-58.5	2.4
Canada	41,039	11,895	-71.0	2.1
Ethiopia	40,220	11,444	-71.5	2.0
South Africa	46,926	11,313	-75.9	2.0
Netherlands	37,266	10,337	-72.3	1.8
Burundi	31,218	9,842	-68.5	1.7
Nigeria	32,906	9,782	-70.3	1.7
South Sudan	24,646	9,552	-61.2	1.7
Sweden	21,678	7,593	-65.0	1.3
DRC	22,174	6,713	-69.7	1.2
Denmark	14,476	5,003	-65.4	0.9
Australia	27,867	4,949	-82.2	0.9
Poland	11,991	4,871	-59.4	0.9
Norway	14,897	4,859	-67.4	0.9
Switzerland	14,235	4,233	-70.3	0.7
Pakistan	10,518	3,965	-62.3	0.7
Zimbabwe	16,003	3,729	-76.7	0.7
Egypt	10,101	3,728	-63.1	0.7
Spain	26,398	3,705	-86.0	0.7
Belgium	13,779	3,630	-73.7	0.6
Others	281,643	71,107	-74.8	12.5
<b>Total</b>	<b>2,048,834</b>	<b>567,848</b>	<b>-72.3</b>	



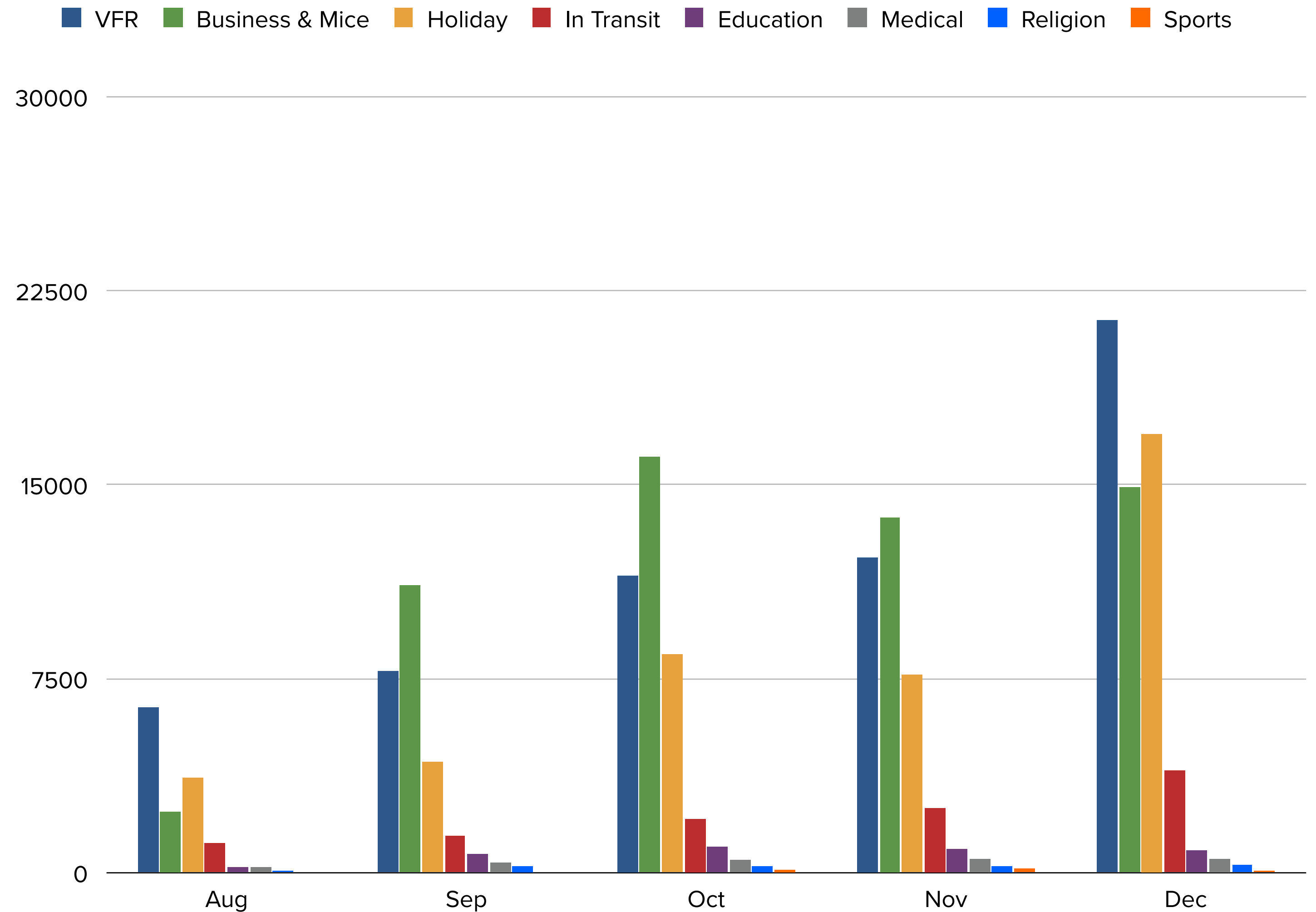
## Market Regions Performance

In terms of regional performance, Africa contributed the highest arrivals at 43.4% closing at 246,505 visitors, Europe was 2<sup>nd</sup> with 166,386 visitors translating to 29.3% of the total arrivals, Americas was 3<sup>rd</sup> with 82,199 visitors, 14.5%. Asia was 4<sup>th</sup> with 62,050 visitors at 10.9%, Oceania and Middle East contributed 1.8% closing at 10,708 arrivals.



# Purpose of Visit

Data on purpose of travel for international tourism is available from August 2020 supported by an improvement in the system of collecting arrivals data. Since August (after the re-opening of Kenya's airspace for non-essential travel) visiting friends and relatives contributed 33.4% of the total arrivals closing at 59,151. Business and MICE was 2<sup>nd</sup> contributing 32.9% with 58,163. Holiday was 3<sup>rd</sup> contributing 23.2% with 41,054 arrivals. On Transit passengers came in 4<sup>th</sup> contributing 6.3% closing with 11,069 and others purposes of entry which include education, medical, religious and sports contributed: 5.8% closing at 10,389 arrivals.





Purpose of visit	Aug	Sep	Oct	Nov	Dec	Total	%
VFR	6,368	7,782	11466	12178	21,357	59,151	33.4
Business & Mice	2,372	11,105	16,054	13,714	14,919	58,164	32.9
Holiday	3,685	4,295	8464	7661	16,949	41,054	23.2
In Transit	1,129	1,405	2082	2482	3,971	11,069	6.3
Education	221	728	990	924	871	3,734	2.1
Medical	194	418	485	515	542	2,154	1.2
Religion	72	252	235	261	294	1,114	0.6
Sports	8	33	118	150	89	398	0.2
Total	14,049	26,018	39,894	37,885	58,992	176,838	



## Tourism Earnings – Receipts from International Tourism

Total receipts from international tourism for the period are estimated to have closed at kshs. 88.567 billion. This is against projected earnings of kshs. 336.228 billion if Covid-19 did not strike translating to a 73.66% loss.

*The development of Kenya TSA has enabled an improvement on the methodology for calculating receipts from international tourists that nets all relevant expenditures.*

## Domestic Tourism Performance

Domestic tourism bed nights closed at 1,845,500. This is a reduction of 61.7% when compared to 2019 performance of 4,818,600





# Global Travel and Tourism Trends

According to Oxford Economics Global travel demand fell by an estimated 73% in 2020 – a loss of 1.1bn visitor arrivals. Recovery is set to begin in 2021, driven by the following key factors:

- Vaccine development and roll-out will support growth and provide an upside for 2021. Recent vaccine announcements have revitalized confidence and provide a more balanced risk outlook compared to previous forecasts. This has sparked hope for future travel performance with clear upside potential, although downside risks remain.
- Challenges in vaccine distribution will define the recovery profile in 2021. Vaccine developments have reduced the downside risks and will allow a gradual lifting of restrictions. However, many unknowns remain regarding vaccine production and the challenges involved in the global distribution, especially in emerging markets.
- Economic income and job impacts will reduce affordability. There is clear and significant pent-up demand, but this will be limited by lingering wage and employment effects of the economic recession, especially for more expensive longer-haul travel. Pricing is less certain but may also affect affordability.
- Travelers will choose closer-to-home destinations. Domestic substitution will continue in 2021 as some international travel restrictions will remain in place for at least part of the year. It will take time for traveler sentiment to recover and short-haul markets will be favored due to safety perception, affordability and possible shifts in preferences for more sustainable destinations and travel modes. Modal shift from air to drive travel will remain a feature in 2021.
- Virtual and hybrid events will continue to replace some in-person meetings and events, but the value of face-to-face meetings will ensure eventual recovery.

## Projected Trends for Destination Kenya

From projections, inbound arrivals into Africa is forecasted to increase on a gradual momentum reaching the 2019 performance level in 2024 as indicated in the table below

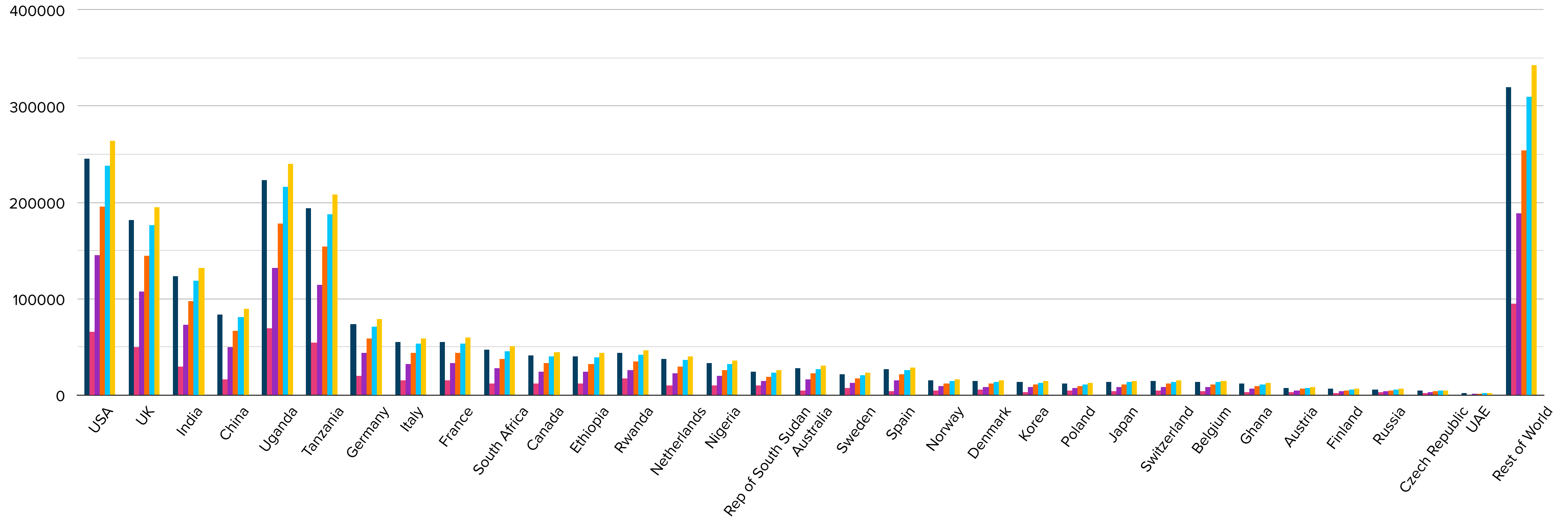
	2020	2021	2022	2023	2024
	e	f	f	f	f
<b>Africa</b>	<b>-72.9%</b>	<b>-40.9%</b>	<b>-20.4%</b>	<b>-3.4%</b>	<b>7.4%</b>

Using the above projections and the market share distribution for 2019 below are the forecast projections for the destination's performance.



2019 2020 2021 2022 2023 2024

## Projections Outlook for 2021-25



Source Market	2019	2020	2021	2022	2023	2024
Data/Estimate/Forecast	Actuals	Actuals	Forecast	Forecast	Forecast	Forecast
USA	245,439	65,377	145,054	195,369	238,076	263,601
UK	181,483	49,828	107,257	144,461	176,039	194,913
India	122,649	29,746	72,486	97,629	118,969	131,725
China	83,388	16,329	49,282	66,377	80,886	89,559
Uganda	223,010	69,378	131,799	177,516	216,319	239,512
Tanzania	193,736	54,046	114,498	154,214	187,924	208,072
Germany	73,150	19,833	43,231	58,227	70,955	78,563
Italy	54,607	15,040	32,273	43,467	52,969	58,648
France	54,979	15,590	32,493	43,763	53,330	59,048
South Africa	46,926	11,313	27,733	37,353	45,518	50,399
Canada	41,039	11,895	24,254	32,667	39,808	44,076
Ethiopia	40,220	11,444	23,770	32,015	39,014	43,197
Rwanda	43,321	17,043	25,603	34,484	42,021	46,527
Netherlands	37,266	9,840	22,024	29,664	36,148	40,024
Nigeria	32,907	9,782	19,448	26,194	31,920	35,342
Rep of South Sudan	23,786	9,552	14,058	18,934	23,073	25,546
Australia	27,867	4,949	16,469	22,182	27,031	29,929
Sweden	21,199	7,593	12,529	16,875	20,563	22,768
Spain	26,314	3,705	15,552	20,946	25,525	28,261
Norway	14,990	4,859	8,859	11,932	14,541	16,100
Denmark	14,218	5,003	8,403	11,317	13,791	15,270
Korea	13,154	3,139	7,774	10,470	12,759	14,127
Poland	11,484	4,871	6,787	9,141	11,140	12,334
Japan	13,490	3,292	7,973	10,738	13,086	14,489
Switzerland	14,050	4,233	8,303	11,184	13,628	15,089
Belgium	13,535	3,630	7,999	10,774	13,129	14,537
Ghana	11,300	2,803	6,678	8,994	10,961	12,136
Austria	7,615	2,390	4,500	6,062	7,387	8,178
Finland	5,995	2,009	3,543	4,772	5,815	6,439
Russia	5,665	2,757	3,348	4,509	5,495	6,084
Czech Republic	4,249	1,633	2,511	3,382	4,122	4,564
UAE	1,563	298	924	1,244	1,516	1,679
Rest of World	319,023	94,650	188,543	253,942	309,452	342,631
Total Air and Sea	1,581,655	428,614	934,758	1,258,997	1,534,205	1,698,697
Total Cross Border	467,179	139,234	276,103	371,874	453,164	501,750
Total Arrivals	2,048,834	567,848	1,210,861	1,630,872	1,987,369	2,200,448



