



Ministry of Tourism
and Wildlife



ANNUAL TOURISM SECTOR PERFORMANCE REPORT 2023

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Annual Tourism Sector Performance Report 2023

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For further information, please contact:

The CEO

Tourism Research Institute

Email: info@tri.go.ke

Website: www.tri.go.ke

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Acronyms and Abbreviations

AfCFTA	African Continental Free Trade Area
CBTEs	Community Based Tourism Enterprises
COVID	CoronaVirus Disease
EU	European Union
GDP	Gross Domestic Product
IATA	International Air Transport Association
IOM	International Maritime Organization
JKIA	Jomo Kenyatta International Airport
KAA	Kenya Airport Authority
KICC	Kenya International Convention Centre
KNBS	Kenya National Bureau Of statistics
KTB	Kenya Tourism Board
KWS	Kenya Wildlife Service
MEA	Middle East and Africa
MDPs	Management Development Programs
MICE	Meeting, Incentives, Convention & Exhibition
MIA	Moi international Airport
MIAM	Moi International Airport, Mombasa
MSMEs	Micro, Small and Medium Enterprises
SGR	Standard Gauge Railway
TRI	Tourism Research Institute
TTCI	Travel and Tourism Competitive Index
UK	United Kingdom
UNWTO	United Nations World Tourism Organization
USA	United States of America
VFR	Visiting Families and Friends
WTTC	World Travel and Tourism Council

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Tourism Research Institute (TRI) is glad to present the Sixth Edition of its Annual Tourism Sector Performance Report. The Report highlights the outcomes of collaborative efforts between the Ministry of Tourism and Wildlife, government institutions and the private sector.

Globally international tourists' arrivals grew by 34% as compared to 2022. This represents an 88% recovery rate of pre-pandemic numbers. Africa recovered 96% to pre-covid levels with Kenya witnessing a notable surge from 1,483,752 in 2022 to 1,951,185 in 2023, representing an impressive growth of 31.5%. The extent of recovery in 2023 was at 95.24% from the 2019 international arrival levels, this is above the pre-pandemic global recovery levels of 88%. The arrivals generated tourist inbound earnings of KSh.352,544,008,170 representing a growth of 31.5%. Out of the total tourist numbers, 1,351,438 (69.3%) and 154,203(7.9%) entered Kenya through Jomo Kenyatta International Airport (JKIA) Nairobi and Moi International Airport (MIA) Mombasa, respectively. Other top borders that contributed to the numbers were Busia, 147,125 (7.54%), Namanga, 109,050 (5.6%) and Malaba, 47,132 (2.4%). The top five tourist sources markets for Kenya were; the United States of America (USA) with 265,310, Uganda 201,623, United Republic of Tanzania with 157,818, United Kingdom with 156,700 and 94,273 Indian visitors. In terms of the top ten countries in each region, Africa was the leading with 679,012 followed by Europe 477,526, Americas, 319,220, Asia with 182,027, Oceania 26,265 and the Middle East 14,173 visitors. China was the most improved source market by recording a 161% increase, Italy 121%, South Korea 99% and Australia 89%. The leading purpose of travel was holiday at 45%, Visiting Family and Relatives (VFR) 24%, and Meetings, Incentives, Conferences and Exhibitions (MICE) at 24%. At the same time, the country had a bed capacity of 135,350 of which 19.44% beds were in Nairobi, Nakuru 10.35%, Mombasa 8.19%, Kilifi 9.6%, Kwale 6.29% and Kisumu 4.25%. In terms of international bed occupancy, for the months of January to September there was an increase from 1,958,140 in the year 2022 to 3,038,466 in the same period for the year 2023, indicating a growth of 55.2%. On the other hand, domestic bed occupancy grew by 8% from 3,050,969 in the months of January to September 2022 to 3,300,438 in the months of January to September 2023. In the evaluated period, the country also received 4 cruise ships, ferrying 2,547 tourists. This represents an increase of 119.6% from 2022 where the country only received 2 cruise ships totalling to 1,134 tourists. Over the same timeframe, the destination also received 30,813 international delegates. The number

of international delegates surged in 2023, triggered by the Africa Climate Summit 2023 which was held at Kenyatta International Conference Centre (KICC). In addition, the destination was also able to host 444,638 local delegates as at September 2023. In tourism training, a total of 2,101 students were trained at Kenya Utalii College in regular programs, part-time, refresher and management development programs. The number of students trained in Regular Programs in hospitality and tourism courses at Kenya Utalii College (KUC) increased from 431 in 2022 to 484 students in 2023 which represents a 12.3% increase. In 2023, (JKIA), functioning as a regional hub, recorded 40,263 combined scheduled and charter flight landings, reflecting a 7% growth from the previous year. However, it still fell short of pre-COVID levels by 14%. At the same time 4,094,994 passengers arrived at JKIA indicating that for every 100 passengers landing 33 are tourists. In the same year Kenya received various accolades. Nairobi emerged the top city in the world "Best in Travel 2024" as announced by the United States-based travel agency Lonely Planet. In the World Travel Awards (WTA), Kenya emerged as a standout destination, achieving numerous accolades, including Africa's Leading Beach Destination and Africa's Leading Business Travel Destination which was awarded to Diani Beach and Nairobi respectively. The achievements have been through efforts in marketing campaigns by Kenya Tourism Board, other government agencies and the private sector across various platforms, including social media, travel websites, and traditional media, which significantly boosted the destination's visibility. The introduction of direct flights between Mombasa and Dubai in addition to the arrival of new airlines in Kenya played a crucial role in aviation in utilising scale and efficiencies to offer customers smoother and more budget-friendly travel alternatives. The country also successfully secured and won bids for hosting prominent conferences such as the Africa Climate Summit, marking a significant achievement in its global presence. It is therefore predicted that in 2024, the destination will receive 2,381,371 tourists hence exceed pre-COVID levels. This is a positive sign for the overall health and resilience of Kenya's tourism industry. Trends to take care of as a destination include the development of wellness tourism, development of boutique hotels, technology and sustainable tourism practices.



01 Introduction

1.1 Purpose of the Performance Report

The purpose of this Tourism Sector Performance Report for 2023 is to provide a comprehensive analysis and evaluation of the state of the tourism industry in Kenya during the specified period. The report serves several key purposes:

a) Assessment of Industry Performance:

- Evaluate the country's international and domestic tourism performance in terms of arrivals, bed nights, economic impact, and key indicators.
- Analyze the factors that influenced the industry's performance, including events, infrastructure developments and technological advancements.

b) Insights into Economic Contributions:

- Examine the economic contributions of tourism, including its impact on Gross Domestic Product (GDP), job creation and revenue generation.
- Provide stakeholders with a clear understanding of the industry's significance to the national and regional economy.

c) Identification of Challenges Faced:

- Highlight challenges and obstacles that the tourism industry encountered during 2023, such as external factors (natural disasters, geopolitical issues) and internal challenges (infrastructure limitations, regulatory changes).

d) Projection of Future Trends:

- Forecast future trends in the tourism industry, considering emerging consumer preferences, technological advancements and global developments.
- Provide insights into potential opportunities and challenges that stakeholders may face in the coming years.

e) Guidance for Stakeholders:

- Offer recommendations and strategic insights for various stakeholders, including government bodies, industry players, and businesses.
- Provide recommendations to promote sustainable tourism practices.

f) Enhancement of Decision-Making:

- Empower decision-makers with data-driven insights to make informed choices regarding tourism policies, investments, and marketing strategies.
- Enable stakeholders to adapt their approaches based on a thorough understanding of the industry's current state and future prospects.

1.2 Global Outlook of Tourism Performance in 2023

According to the United Nations World Tourism Organization (UNWTO) Barometer, global international tourist arrivals grew by 34% as compared to 2022. This represents an 88% recovery rate pre-pandemic numbers. July, September and October 2023 were particularly strong months, with arrivals reaching 92% of 2019 levels. This growth can be attributed to increased demand for travel and enhanced connectivity. Europe received 54% of the world's total arrivals. In terms of recovery, the Middle East region led recovery being the

only region that surpassed pre-pandemic levels by 22%. Europe recorded 94% recovery levels while Americas region recovered by 90% due to strong intra-region demand while Africa recovered 96% of pre-pandemic visitors.

Asia and the Pacific recovery were at 65%, this gradual recovery was due to late opening up of several destinations at the beginning of 2023 as compared to other destinations.



Figure 1. International tourist arrivals % change vs. 2019
Source(UNWTO)

Over 40 destinations surpassed 2019 performance for both arrivals and receipts in the year under review. Qatar surpassed by 90% where arrivals almost doubled, Saudi Arabia increased by 56%, Albania by 53% among others. International tourism receipts grew to \$1.4 trillion which

represents a recovery of 92% pre-pandemic period. Several destinations exceeded pre-pandemic inbound earnings in the first 11 months of 2023 these were Serbia 79%, Pakistan, 77%, Mauritius 36%, Morocco 34% among others.

2024 Global Tourism Performance Forecast

According to the Barometer, global international tourism arrivals are expected to grow above pre-pandemic levels at 2%, subject to Asia's growth pace and economic and geopolitical negative risk. Consistent with the UNWTO Tourism Confidence Index survey, 67% of tourism professionals foresee better prospects for 2024 compared to 2023. The following measures are projected to lead to growth of tourism performance in 2024;

- Asia re-opening: The reopening of several source markets and destinations will boost recovery in the region and globally.
- Visa and travel facilitation: Middle East performance will increase due to the implementation of the Gulf Cooperation Council (GCC) unified tourist visa. China has declared visa-free travel for citizens of France, Germany, Italy, the Netherlands, Spain and Malaysia for a year to 30 November 2024. In Africa, the introduction of the visa free for all travellers into Kenyan facilitated by Electronic Travel Authorization (ETA) system for all travellers is expected to boost performance as well as Rwanda's free visa for all Africans

- European Influence: Europe is anticipated to lead in 2024, with Romania and Bulgaria joining the Schengen area and Paris hosting the Summer Olympics.
- US Travel Impact: Strong travel from the United States, supported by a robust US dollar, will continue benefiting destinations globally.
- Consumer Trends: Travellers are likely to prioritise value for money, opt for closer destinations, and emphasize sustainability in their choices.

Impediments to Growth

- Economic Instability: Persisting inflation, high interest rates, volatile oil prices and disruptions to trade can continue to impact transport and accommodation costs in 2024 leading to high cost of doing business.
- Geopolitical Concerns: Conflict in the Middle East and Russia-Ukraine war may also disrupt travel.
- Staff shortages: There is a shortage of skilled labour in tourism businesses making it difficult for the sector to cope with the high demand.



1.3 African Regional Tourism Performance 2023

Africa recovered 96% to pre-covid levels The data indicates that a majority of these arrivals were from the European markets. The outstanding performance positioned Africa as one of the world's fastest-recovering tourism markets, outpacing the Americas (87%) and Asia-Pacific (61%) in returning to pre-crisis visitor levels, as per the UNWTO Barometer data.

Post COVID-19 travelers increasingly recognize Africa as an enchanting destination with its diverse cultures, breathtaking landscapes, and unique wildlife, the continent stands on the brink of a transformative opportunity. However, to fully capitalize on this potential, Africa needs to undergo a paradigm shift in its tourism industry. The adoption

of sustainability, local empowerment, and technological integration must become fundamental principles guiding this shift. By embracing these principles, Africa can drive both recovery and growth in its tourism sector, ensuring long-term success.

Euromonitor International's Voice of the Consumer Survey for African Markets revealed that Tourists seek diverse activities when visiting Africa. Relaxation, safety, connection with nature, and engaging in outdoor pursuits is among their top four preferences. This indicates that the continent's captivating scenery, abundant wildlife, and exciting outdoor adventures are major attractions as shown in the figure below;

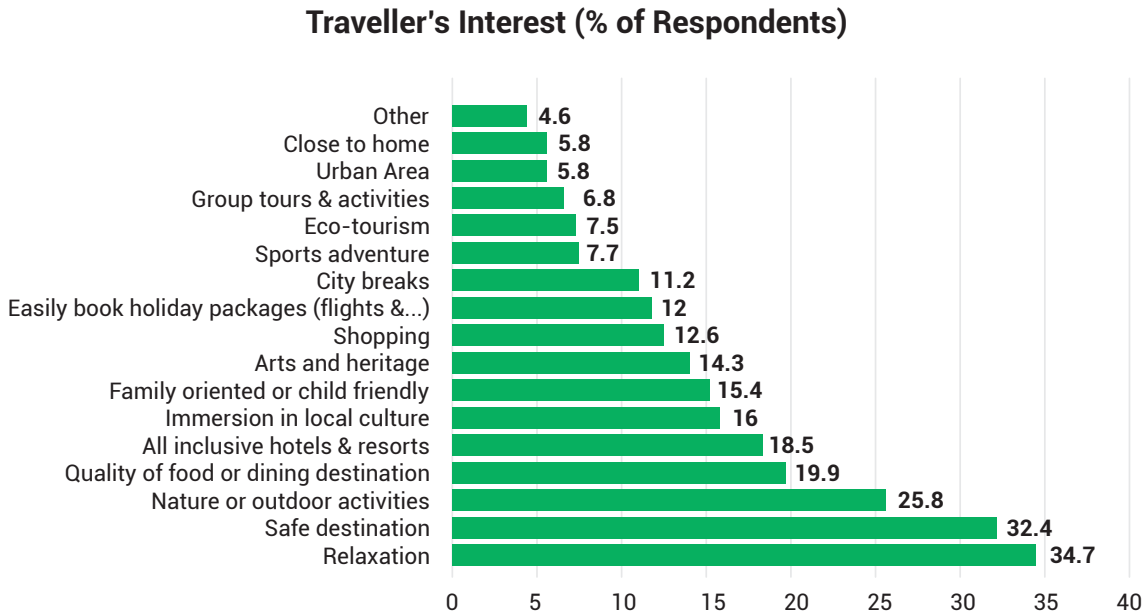


Figure 2: Percentage of Respondents
Source: Africa Travel Week

In terms of tourism employment share in Africa, the sector over the years 2020 to 2023 reveals a journey of recovery and adaptation amidst the challenges posed by the global pandemic. In 2020, the sector experienced a dip, with the level of employment standing at 4.6%. In 2022, the growth trajectory exhibited a slight growth, with the employment percentage settling at 4.7%. Despite this setback, the sector showcased resilience, with businesses implementing adaptive strategies to navigate the evolving landscape.

The story continued on an upward trajectory in 2023, with the employment level rising to 4.9%. This growth suggested a more robust recovery, marked by the increased confidence in travel. The industry demonstrated its ability to adapt, innovate, and recover from the profound disruptions caused by the pandemic, setting the stage for a more optimistic outlook in the years to come. (Statista 2024)

Share of the travel and tourism sector in employment in Africa from 2020 to 2023

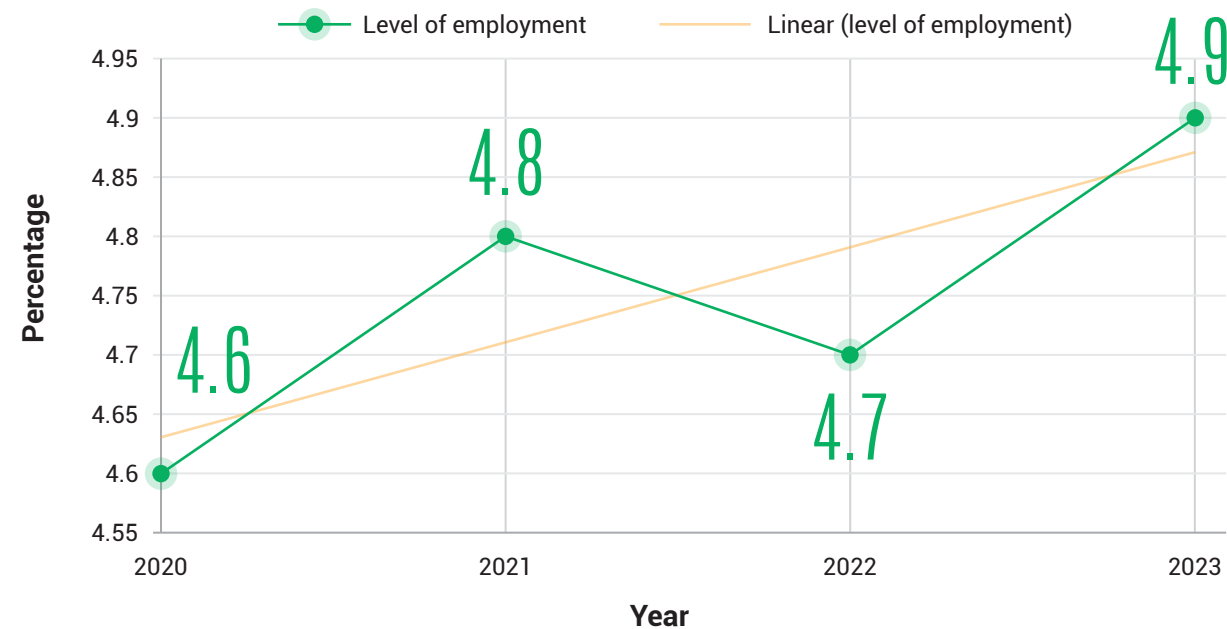


Figure 3: Share of the travel and tourism sector in employment in Africa from 2020 to 2023

1.4 Kenya Tourism Performance Sector Overview 2023

In 2023, Kenya's tourism sector exhibited a resilient performance, marking significant strides towards recovery after facing challenges in previous years. This report offers a comprehensive overview of the country's tourism landscape during the year, shedding light on key indicators and noteworthy developments. Against the backdrop of global uncertainties, Kenya's commitment to revitalising its tourism industry is evident in the strategies implemented and the positive outcomes achieved. By examining the sector's performance, this analysis aims to provide stakeholders, policymakers, and industry enthusiasts with valuable insights into the dynamics shaping Kenya's tourism landscape in 2023. From notable growth figures to recognition on the global stage, Kenya's tourism performance demonstrates a promising trajectory and underscores the resilience of the nation's travel and hospitality sector. Some of the areas of this report includes:

- i. Inbound tourist numbers
- ii. Flight landings

- iii. Inbound tourism earnings
- iv. Bed capacity, Bed nights and Room occupancies.
- v. MICE Performance for the local and international conferences.
- vi. Tourism training performance
- vii. Visitation to National Parks, Museums and Heritage Sites
- viii. International Awards and Accolades
- ix. Initiatives supporting sector performance in 2023. To track sector recovery, the report gives a comparative analysis and reports on the extent of sector recovery from the best year 2019 and 2023. It further presents projection from 2024 to 2028.

2023 Inbound Tourist Numbers And Flight Landings

2.1 Visitor Arrivals

Tourist arrivals in Kenya exhibited an increase from 1,483,752 in 2022 to 1,951,185 in 2023 depicting an increase of 31.5% as shown in Figure 4. The 2023 figure represents a substantial increase compared to the previous year, highlighting the country's potential and appeal in the global tourism landscape. This growth in tourist arrivals could have various implications for the local economy, including increased revenue, job opportunities, and the overall development of the tourism sector.

According to the Exit Survey (ES) conducted in April 2023, this growth can be attributed to the good value for money. This implies that visitors believe they are getting quality experiences, services, and attractions relative to the cost of their travel. This encompasses a range of factors such as accommodation, activities, and overall satisfaction

with their travel expenditure. The ES also points to the affordability of travel in Kenya as a significant factor influencing the increase in tourist numbers. The findings reveal that travel, accommodation, and other associated costs are within a reasonable budget and it makes the destination more accessible to a broader range of potential visitors. This affordability can attract a diverse group of tourists with varying budget considerations. Finally, the ES painted Kenya as a safe destination which is crucial in attracting tourists. A positive image regarding safety and security encourages more people to choose Kenya as their travel destination. This perception may result from effective safety measures, low crime rates in tourist areas and the country's commitment to providing a secure environment for visitors.

Trend On Arrivals 2019 to 2023

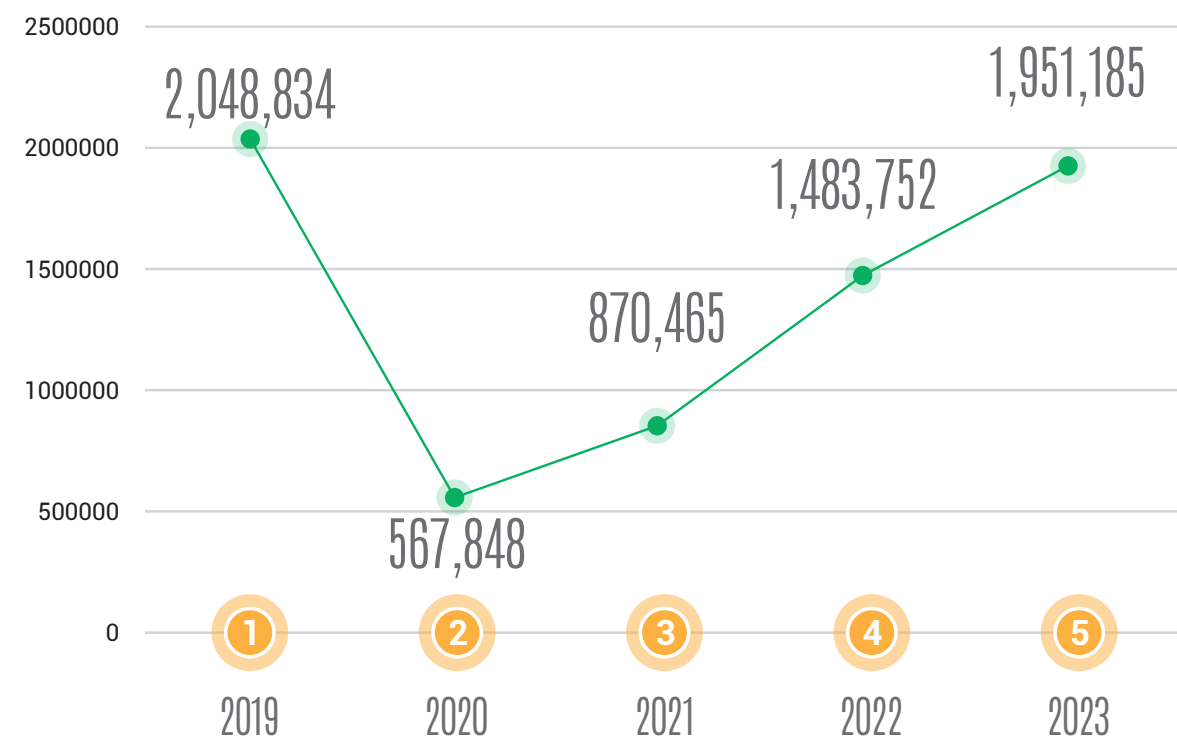


Figure 4: International Arrivals over 2019 - 2023

Monthly Visitor Arrivals

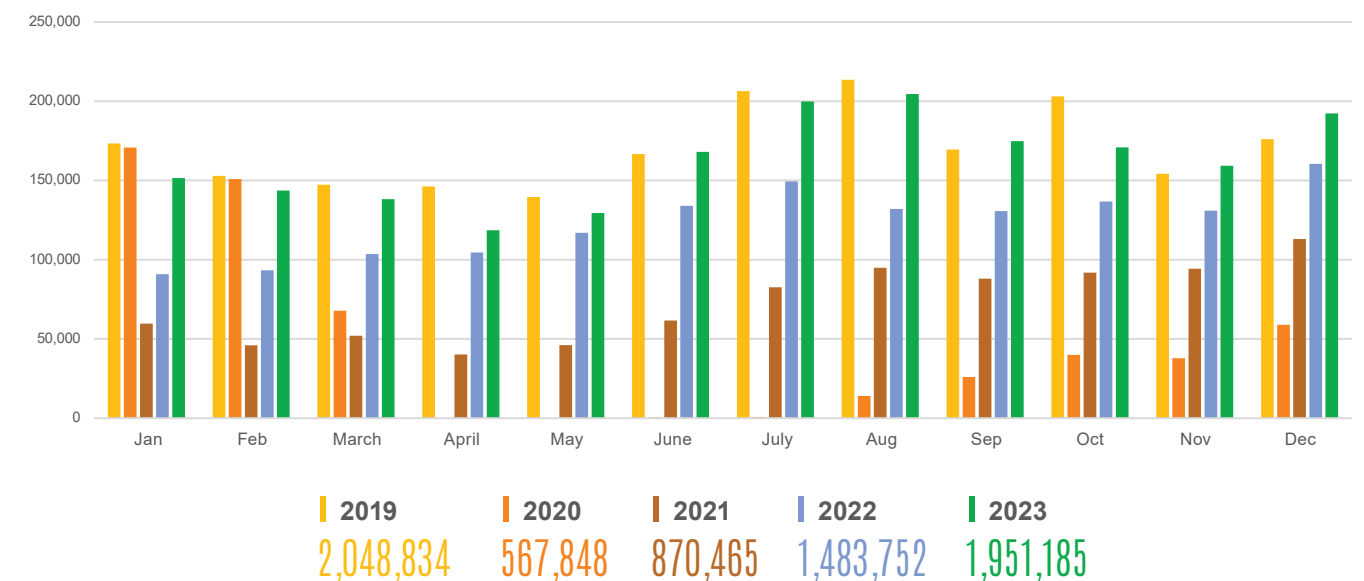


Figure 5: Monthly International Visitor Arrivals. 2019 - 2023

Figure 5 shows monthly international visitor arrivals. In 2023 the month of August recorded the highest number of visitors at 11% of the total arrivals. Comparing 2023 to pre-pandemic, the trend remained the same with the

numbers increasing in July and peaking in August. This was attributed to the wildebeest migration experience in Maasai Mara around late July to August.

2.1.1 Arrivals by Point of Entry

Table 1: Monthly International Visitor Arrivals by Entry Points

Source: Directorate of Immigration Services

Entry Points	JKIA					MIA				
	2019	2020	2021	2022	2023	2019	2020	2021	2022	2023
Jan	113,050	113,078	43,234	63,277	98,059	15,740	12,205	3,045	6,655	15,989
Feb	106,198	106,345	32,047	67,560	99,432	12,761	11,086	3,005	6,390	14,863
March	93,571	43,346	37,214	76,336	95,327	20,159	3,950	3,194	5,073	14,031
April	103,522	8	27,850	77,379	81,339	4,769	0	3,037	3,949	7,315
May	98,596	93	32,153	87,058	90,752	3,591	0	1,735	3,429	5,493
June	122,122	440	46,494	103,332	124,483	6,650	2	2,038	4,834	7,814
July	149,994	467	64,498	109,766	145,859	8,520	1	4,532	6,423	12,241
August	148,816	13371	72,291	97,103	141,792	10,988	548	6,257	7,555	16,301
September	121,668	16,565	66,667	90,502	123,275	9,199	662	3,633	6,282	11,973
October	138,033	27,932	67,608	96,168	118,254	11,157	1,179	5,201	8,525	13,502
November	108,755	27,311	71,271	88,342	108,676	12,315	1,040	5,435	10,878	14,928
December	119,646	43,362	82,867	105,939	124,190	12,373	3,113	7,637	14,867	19,753
Total	1,423,971	392,318	644,194	1,062,762	1,351,438	128,222	33,786	48,749	84,860	154,203

Entry Points	OTHER ENTRY POINTS*					Totals Entry Points (JKIA, MIA & Other Entry Points)				
	2019	2020	2021	2022	2023	2019	2020	2021	2022	2023
Jan	44,514	45,520	13,408	20,966	37,423	173,304	170,803	59,687	90,898	151,471
Feb	33,876	33,537	10,912	19,380	29,337	152,835	150,968	45,964	93,330	143,632
March	33,569	20,523	11,643	22,159	28,869	147,299	67,819	52,051	103,568	138,227
April	37,968	19	9,296	23,184	29,912	146,259	27	40,183	104,512	118,566
May	37,351	44	12,254	26,506	33,190	139,538	137	46,142	116,993	129,435
June	37,920	139	13,076	25,903	35,754	166,692	581	61,608	134,069	168,051
July	47,826	207	13,594	33,222	41,786	206,340	675	82,624	149,411	199,886
August	53,787	130	16,439	27,373	46,509	213,591	14,049	94,987	132,031	204,602
September	38,707	8,792	17,691	33,969	39,560	169,574	26,019	87,991	130,753	174,839
October	53,928	10,782	18,990	32,040	39,083	203,118	39,893	91,799	136,733	170,839
November	33,183	9,534	17,612	31,678	35,706	154,253	37,885	94,318	130,898	159,210
December	44,012	12,473	22,607	39,750	48,415	176,031	58,948	113,111	160,556	192,358
Total	496,641	141,700	177,522	336,130	445,544	2,048,834	567,804	870,465	1,483,752	1,951,185

***Other entry points are:** – Busia, Namanga, Malaba, Lungalunga, Lwakhakha, Isebania, Taveta, Loitoktok, Moyale, Wilson Airport, Kisumu Airport, Suam, Garissa/Tana Bridge, Nadapal, Shimoni Seaport, Wajir Airport, Eldoret Airport, Lokichogio Airport, Muhuru Bay, Malindi Airport, Kisumu Pier, Isiolo Airport and Kilindini Seaport.

JKIA performance saw an increase of 27.16% as compared to the previous year. MIA also saw an increase of 81.71% as shown in Table 1.

2.1.2 Total Arrivals Through Other Entry Points 2023

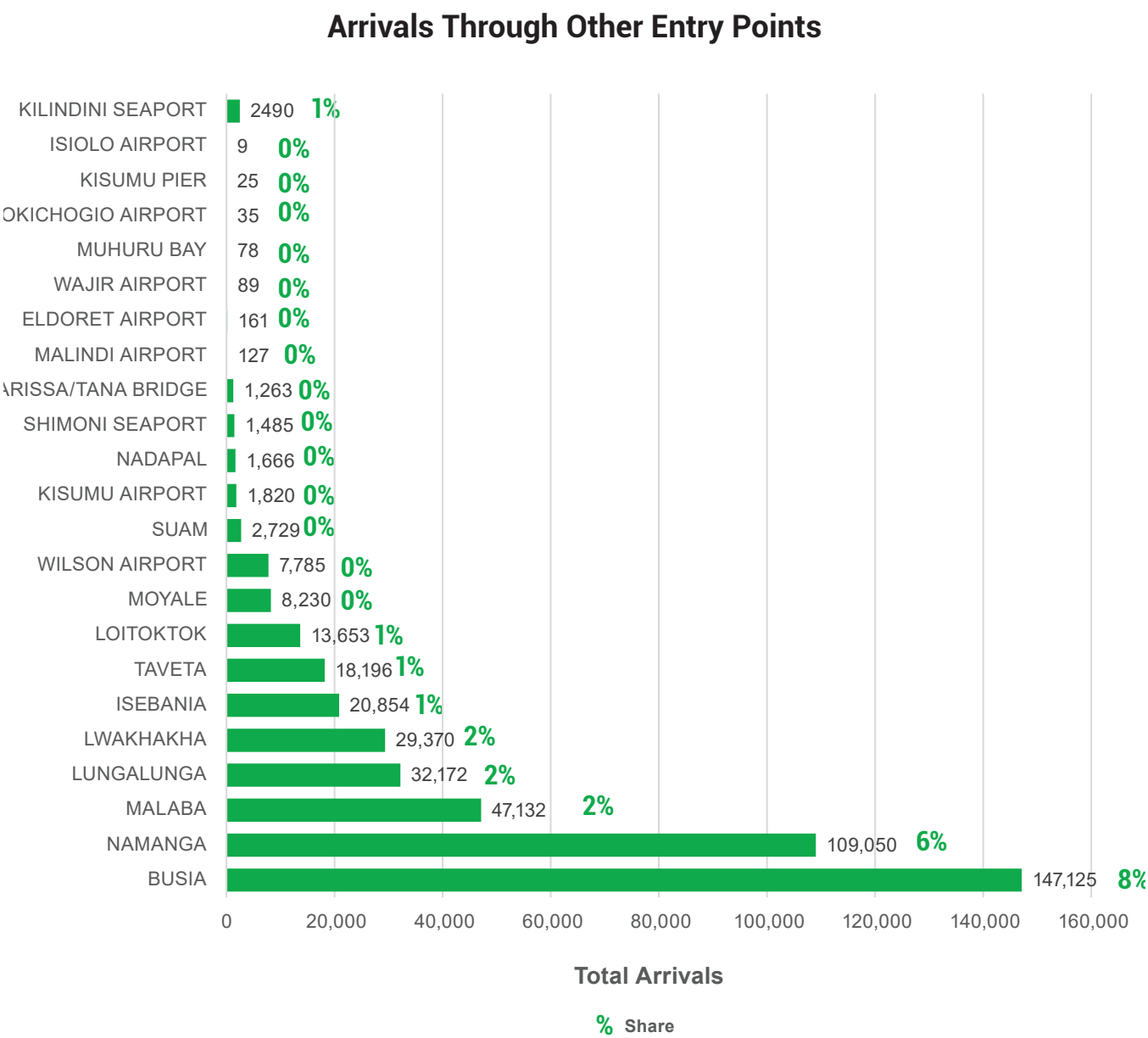


Figure 6: Total Arrivals Through Other Entry Points 2023.
Source: Directorate of Immigration Services

In the year 2023, JKIA registered the highest number of arrivals at 69% of the total arrivals followed by MIA at 8%. Most tourists using the road as mode of transport came through Busia Border at 8% of the total arrivals followed by Namanga Border at 6% and Malaba at 2%. A total of 4,000 visitors used water as mode of transport through Kilindini Seaport, Shimoni Seaport and Kisumu Pier.

2.1.3 Performance by Source Markets - Top 30 Source Countries 2023

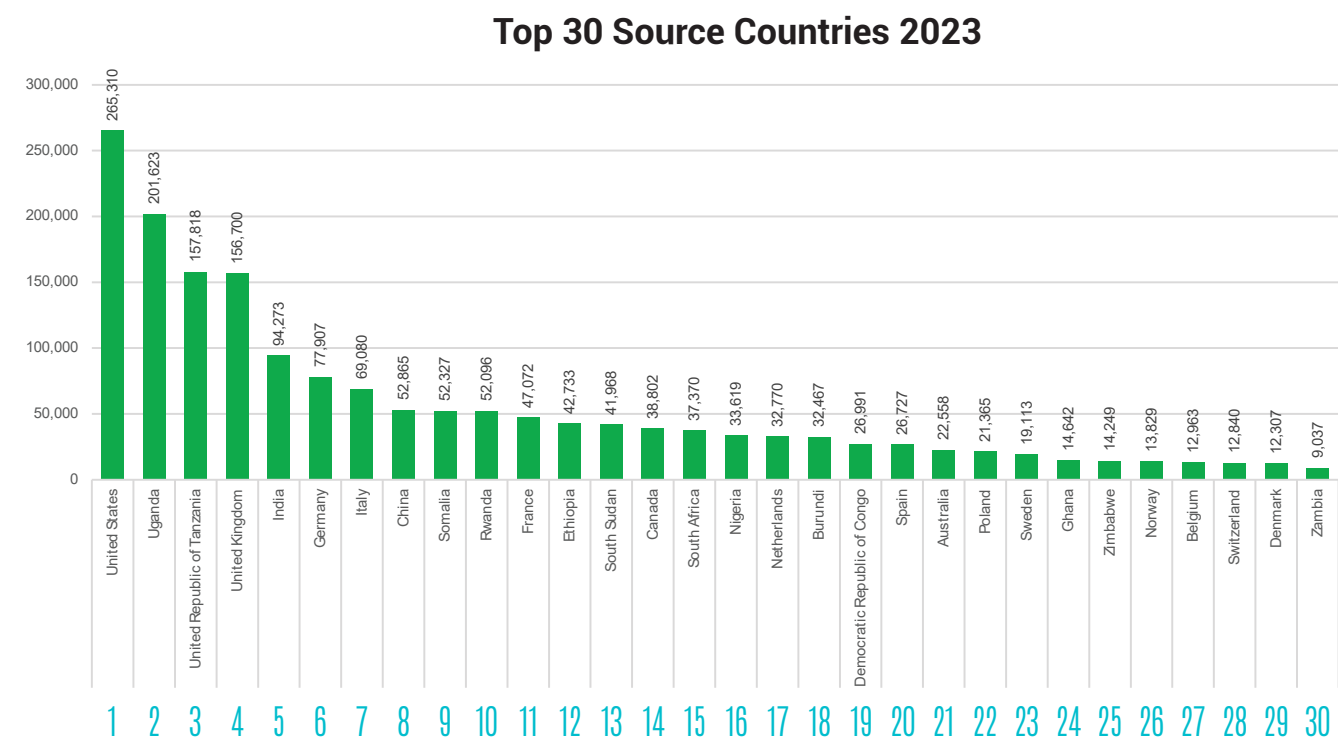


Figure 7: Top 30 Source Countries 2023
Source: Directorate of Immigration Services

The top performing source market in 2023 was the United States of America (USA) with 265,310 which was 14% of the total. This was closely followed by Uganda, the United Republic of Tanzania and the United Kingdom with 10%, 8%, and 8% market shares, respectively. The USA market surpassed the 2019 mark when it yielded 245,437 arrivals. Also, worth noting was the Uganda market performance

whose extent of recovery was at 90%, having yielded 223,010 arrivals in 2019.

The other source markets with a notable number of visitor arrivals were India, Germany, Italy, China, Somalia and Rwanda. Notably 13 of the 30 top market performers were from Africa which together had a share of 60% of the total.

2.1.4 Top 30 Source Markets by Entry Points, 2023

Table 2: Top 30 Source Markets by Entry Points, 2023
Source: Directorate of Immigration Services

Nationality/ Border	Busia	Jkia	Mia	Eldoret Airport	Wilson Airport	Garissa/ Tana Bridge	Namanga	Isebania	Loitoktok	Malaba	Lungalunga	Total
United States	1510	238469	5380	72	4085	700	6793	4784	226	673	478	265,307
Uganda	83569	48710	4211	18	60	2	4091	340	377	33307	604	201,620
United Republic of Tanzania	3635	26207	1663	1	159	12	71795	6799	10913	1006	26804	157,818
United Kingdom	681	143709	6330	16	480	51	2485	501	203	352	680	156,701
India	2699	84114	2411	1	123	1	3135	277	271	700	346	94,273
Germany	602	42042	30967	3	129	2	1878	268	214	216	223	77,907
Italy	105	22473	45848	3	50	0	322	58	15	38	72	69,080
China	247	49920	701	0	89	7	1112	417	74	129	59	52,865
Somalia	88	51015	328	0	63	224	19	2	2	516	17	52,328
Rwanda	21100	18584	121	0	24	1	770	120	366	2647	150	52,097
France	120	43062	2983	0	80	0	507	51	28	31	90	47,072
Ethiopia	279	30548	3136	2	81	83	167	2	2	848	11	42,734
South Sudan	8681	28612	95	21	260	8	413	14	7	2177	21	41,968
Canada	253	34491	1655	2	370	53	902	437	44	176	199	38,802
South Africa	97	35539	741	9	130	12	477	89	32	36	109	37,370
Nigeria	530	30941	1768	0	13	1	163	13	2	142	12	33,619
Netherlands	234	29731	1220	0	59	4	863	122	111	106	150	32,771
Burundi	11838	10126	34	0	20	0	2765	4204	35	799	202	32,467
Democratic Republic of Congo	6242	15680	214	0	47	0	1013	183	78	904	139	26,991
Spain	112	24767	648	0	72	0	555	443	14	23	35	26,727
Australia	349	19549	426	0	223	17	1095	404	133	218	40	22,561
Poland	63	4873	15933	0	5	0	279	105	17	21	33	21,365
Sweden	79	17442	1148	0	22	34	199	29	20	46	50	19,113
Ghana	137	14062	193	0	12	0	130	11	17	26	16	14,642
Zimbabwe	142	13209	192	1	8	0	523	23	26	55	49	14,249
Norway	213	12281	867	1	13	26	225	28	5	31	48	13,829

Nationality/ Border	Busia	Jkia	Mia		Eldoret Airport	Wilson Airport	Garissa/ Tana Bridge	Namanga	Isebania	Loitoktok	Malaba	Lungalunga	Total		
Belgium	65	10508	1973		0	32	1	203	16	18	37	57		12,963	
Switzerland	80	9294	2862		6	44	0	258	78	13	53	43		12,840	
Denmark	32	11277	667		0	35	3	181	20	2	30	31		12,307	
Zambia	106	8183	141		0	1	0	421	32	10	24	103		9,037	
Nationality/ Border	Lwakha- kha	Kisumu Airport	Moyale	Taveta	Loki- chogio Airport	Nadapal	Suam	Wajir Airport	Shimoni Sea- port2	Muhuru Bay	Malindi Airport	Isiolo Airport	Kisumu Pier	Kilindini Seaport	Total
United States	23	1080	72	189	4	19	36	78	2	13	11	8		602	265,307
Uganda	23203	50	47	479	2	84	2455	0	1	3	7				201,620
United Republic of Tanzania	1117	10	43	6152	0	5	2	0	1430	55	0		10		157,818
United Kingdom	11	101	25	272	0	4	24	0	18	1	17			740	156,701
India	0	32	29	120	0	0	9	0	0	0	0		4	1	94,273
Germany	5	21	53	216	0	17	34	2	4	1	40			970	77,907
Italy	0	10	13	55	0	0	6	0	0	1	8			3	69,080
China	1	10	40	33	0	8	14	0	2	0	0	0	0	2	52,865
Somalia	32	0	12	0	0	10	0	0	0	0	0				52,328
Rwanda	643	0	12	7508	0	20	12	0	0	2	17				52,097
France	0	11	25	69	1	0	8	0	6	0	0				47,072
Ethiopia	194	0	7327	0	6	44	1	0	0	0	3				42,734
South Sudan	192	0	69	1	14	1375	8	0	0	0	0				41,968
Canada	4	132	11	44	4	8	1	0	1	0	1			14	38,802
South Africa	0	19	5	39	0	0	11	0	6	0	16	1		2	37,370
Nigeria	0	1	14	0	0	18	1	0	0	0	0				33,619
Netherlands	10	25	17	79	0	0	23	0	3	0	1			13	32,771
Burundi	54	0	4	2384	0	0	2	0	0	0	0				32,467
Democratic Republic of Congo	2449	1	20	14	1	1	4	0	0	1	0				26,991
Spain	0	24	10	16	0	1	3	0	0	0	1			3	26,727
Australia	1	47	12	38	0	1	1	0	0	0	0			7	22,561
Poland	0	7	7	16	0	0	4	0	0	0	0			2	21,365
Sweden	2	4	5	23	0	0	2	0	1	0	1			6	19,113
Ghana	13	0	3	9	0	7	5	0	1	0	0				14,642
Zimbabwe	0	0	2	16	0	0	0	1	0	1	1				14,249
Norway	0	0	2	73	1	1	1	0	0	0	0			13	13,829

Nationality/ Border	Lwakha- kha	Kisumu Airport	Moyale	Taveta	Loki- chogio Airport	Nadapal	Suam	Wajir Airport	Shimoni Sea- port2	Muhuru Bay	Malindi Airport	Isiolo Airport	Kisumu Pier	Kilindini Seaport	Total
Belgium	0	24	7	14	0	0	5	0	0	0	0			3	12,963
Switzerland	2	15	14	36	0	7	6	0	1	0	1			27	12,840
Denmark	2	0	4	18	0	0	2	0	0	0	0			3	12,307
Zambia	0	0	2	14	0	0	0	0	0	0	0				9,037

2.1.5

Performance by Market Regions

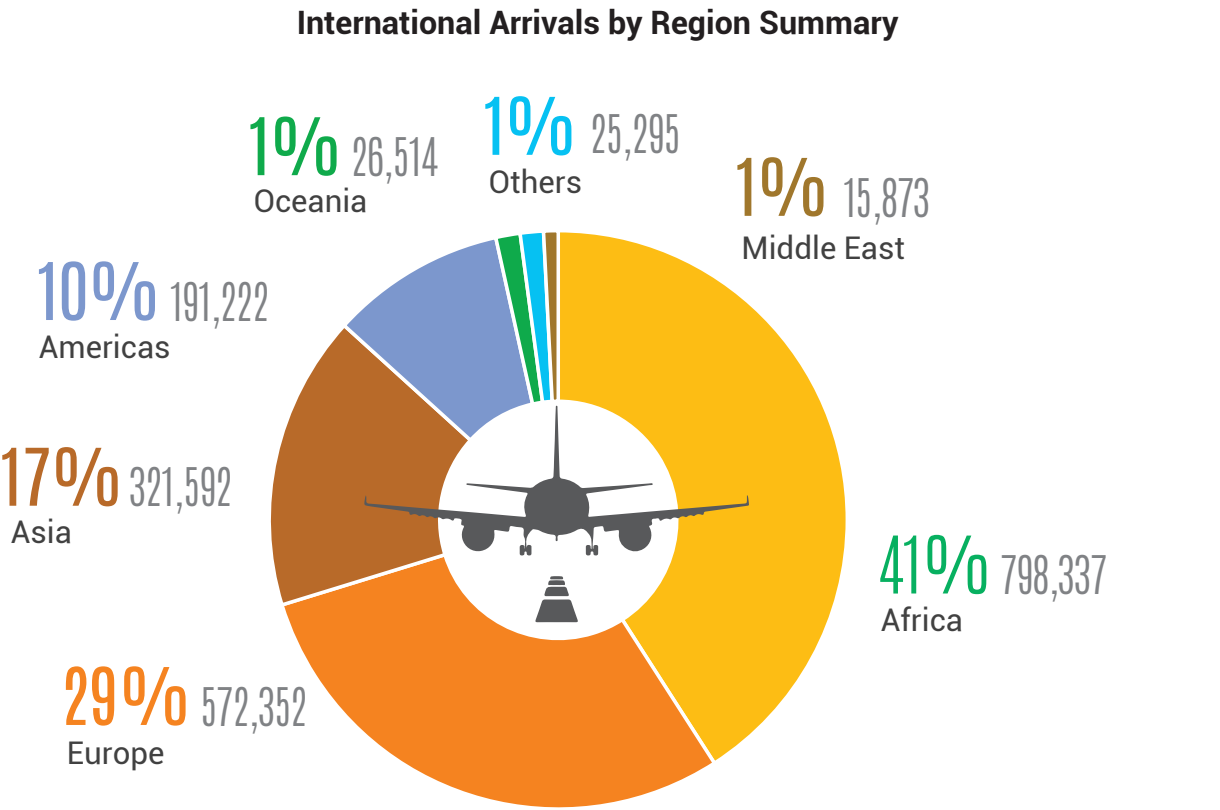


Figure 8: International Arrivals by Region.

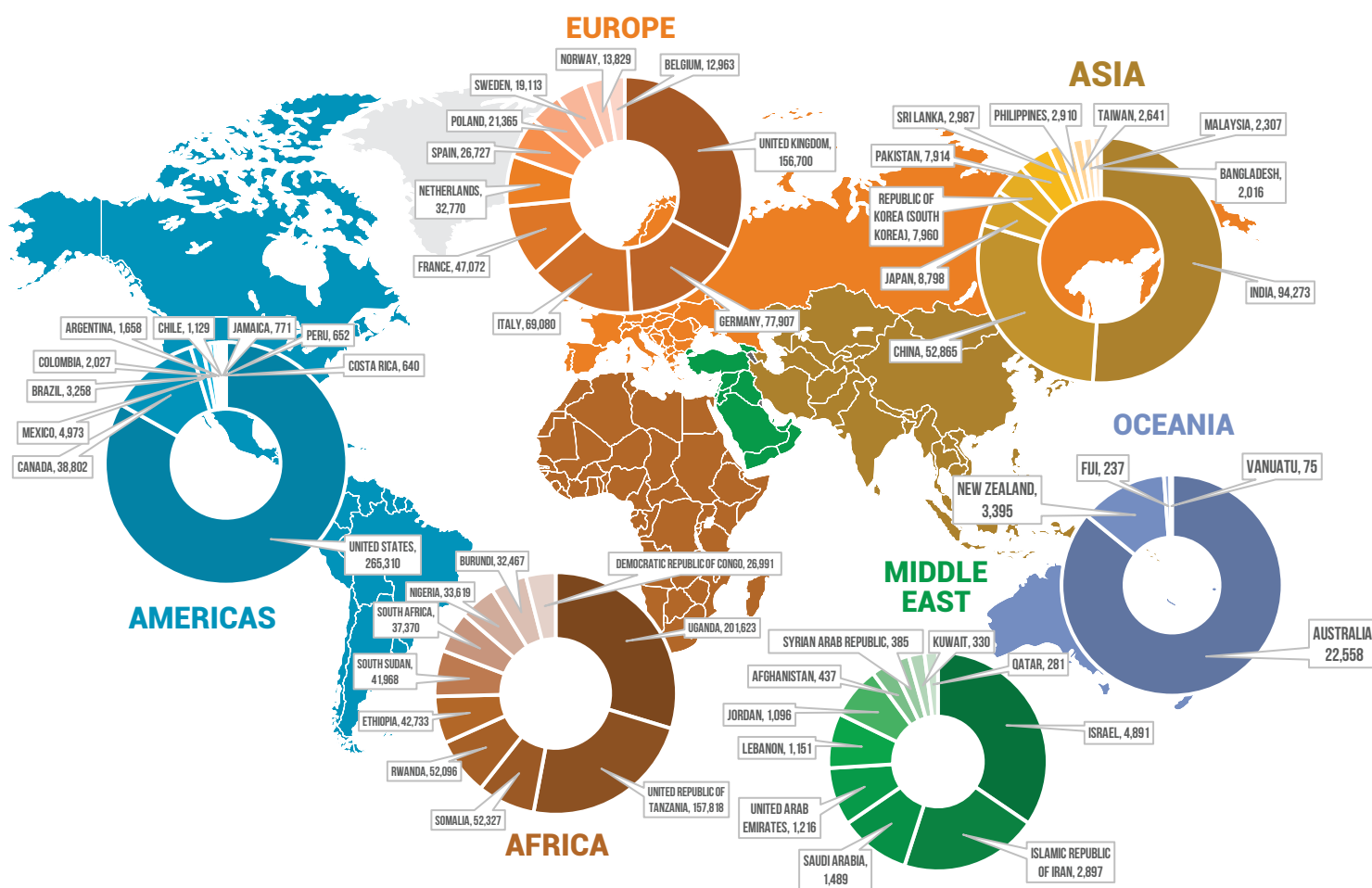


Figure 9: Top 10 Performers by Market Regions

Source: Directorate of Immigration Services

2.1.6 Most Improved Markets for 2023

Table 3: Source Markets with Positive Growth - 2023 Compared to 2022

Source: Directorate of Immigration Services

S/ No	Nationality	2022	2023	Increase	% Change
1	China	20,260	52,865	261%	161%
2	Italy	31,301	69,080	221%	121%
3	Republic of Korea (South Korea)	3,999	7,960	199%	99%
4	Australia	11,931	22,558	189%	89%
5	Spain	16,391	26,727	163%	63%
6	Poland	13,708	21,365	156%	56%
7	Ghana	9,886	14,642	148%	48%
8	Burundi	22,291	32,467	146%	46%
9	Germany	53,498	77,907	146%	46%
10	Switzerland	8,923	12,840	144%	44%

S/ No	Nationality	2022	2023	Increase	% Change
11	Canada	27,639	38,802	140%	40%
12	Belgium	9,436	12,963	137%	37%
13	Norway	10,139	13,829	136%	36%
14	Uganda	151,121	201,623	133%	33%
15	France	35,329	47,072	133%	33%
16	Netherlands	24,601	32,770	133%	33%
17	South Africa	28,289	37,370	132%	32%
18	Somalia	40,133	52,327	130%	30%
19	United Republic of Tanzania	123,836	157,818	127%	27%
20	United States	209,360	265,310	127%	27%
21	Democratic Republic of Congo	21,428	26,991	126%	26%
22	United Kingdom	131,526	156,700	119%	19%
23	South Sudan	35,760	41,968	117%	17%
24	Ethiopia	36,581	42,733	117%	17%
25	Denmark	10,539	12,307	117%	17%
26	India	83,106	94,273	113%	13%
27	Sweden	17,062	19,113	112%	12%
28	Rwanda	48,232	52,096	108%	8%
29	Nigeria	31,713	33,619	106%	6%

China was the most improved source market. The visitors increased from 20,260 in 2022 to 52,865 in 2023, translating to a 161% growth. This was attributed to the reopening of its borders at the beginning of 2023. Italy was second where the arrival number increased from 31,301 in 2022 to 69,080 in 2023 which translated to 121% growth. The USA market which has been the leading market also recorded

commendable growth of 209,360 from 2022 to 265,310 for the year under review which represents an increase of 27%. South Korea, Australia and Spain also registered significant growth with 99%, 89% and 63%, respectively as indicated in Table 3.

2.1.7 Purposes of Visit, 2023

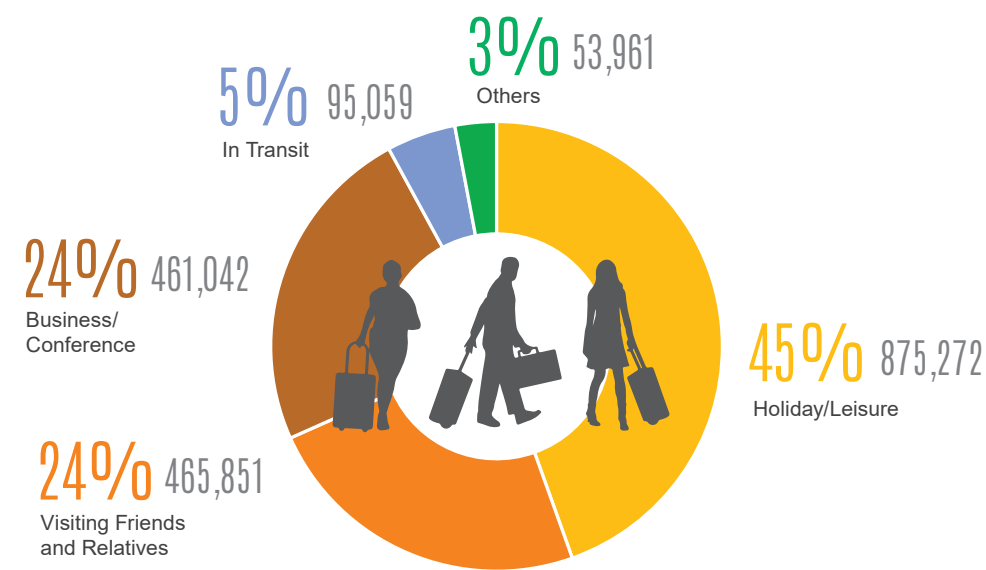


Figure 10: Arrivals by Purpose of Visit - 2023
Source: Directorate of Immigration Services

Figure 10 shows the arrival by purpose of visit. Topping the list were visitors on holiday at 45%. This was followed by those Visiting Friends and Relatives (VFR) at 24% of the total. Arrivals on business and MICE came at a close third with 24% of the total visitation.

There was also a good number of visitors for other purposes such as religion, education, medical, employment and sporting activities. Additionally, 5% were visitors who entered the country while on transit to their final destinations.

Figure 10 shows two top purposes of visit for each lead

source market. In the northern Americas, holiday/ leisure took the lead followed by VFR, while in the south Americas it was holiday/leisure followed by business/conference. In Europe holidays took the lead followed by VFR. Africa has also maintained the trend whereby the main purpose of visit was Business and VFR, apart from South Africa and Nigeria where it was mainly for Holiday and Business. Asia's main purpose of visit was holiday followed closely by Business and VFR and while for the Middle East, the main purpose was holiday followed by VFR

Table 4: Top Purposes of Visits Per Region
Source: Directorate of Immigration Services

AMERICAS		
Nationality	Purpose of Visit	%
United States	Holiday/Leisure	62%
	Visiting Friends and Relatives	26%
Canada	Holiday/Leisure	59%
	Visiting Friends and Relatives	27%
Mexico	Holiday/Leisure	79%
	Visiting Friends and Relatives	9%
Brazil	Holiday/Leisure	67%
	Business/Conference	18%
Colombia	Holiday/Leisure	67%
	Business/Conference	21%

EUROPE		
Nationality	Purpose of Visit	%
United Kingdom	Holiday/Leisure	60%
	Visiting Friends and Relatives	24%
Germany	Holiday/Leisure	79%
	Visiting Friends and Relatives	12%
Italy	Holiday/Leisure	90%
	Visiting Friends and Relatives	4%
France	Holiday/Leisure	68%
	In Transit	13%
Netherlands	Holiday/Leisure	65%
	Visiting Friends and Relatives	18%
Spain	Holiday/Leisure	84%
	Visiting Friends and Relatives	7%
Poland	Holiday/Leisure	92%
	In Transit	3%
Sweden	Holiday/Leisure	56%
	Visiting Friends and Relatives	35%
Norway	Holiday/Leisure	62%
	Visiting Friends and Relatives	29%
Belgium	Holiday/Leisure	72%
	Visiting Friends and Relatives	13%
OCEANIA		
Nationality	Purpose of Visit	%
Australia	Holiday/Leisure	63%
	Visiting Friends and Relatives	25%
New Zealand	Holiday/Leisure	67%
	Visiting Friends and Relatives	19%
Fiji	Business/Conference	57%
	Holiday/Leisure	22%

AFRICA		
Nationality	Purpose of Visit	%
Uganda	Business/Conference	52%
	Visiting Friends and Relatives	26%
United Republic of Tanzania	Business/Conference	44%
	Visiting Friends and Relatives	34%
Somalia	Visiting Friends and Relatives	67%
	Holiday/Leisure	18%
Rwanda	Business/Conference	50%
	Visiting Friends and Relatives	32%
Ethiopia	Visiting Friends and Relatives	46%
	Business/Conference	28%
South Sudan	Visiting Friends and Relatives	53%
	Business/Conference	24%
South Africa	Business/Conference	44%
	Holiday/Leisure	29%
Nigeria	Holiday/Leisure	43%
	Business/Conference	31%
Burundi	Visiting Friends and Relatives	45%
	Business/Conference	37%
Democratic Republic of Congo	Business/Conference	39%
	Visiting Friends and Relatives	24%

MIDDLE EAST		
Nationality	Purpose of Visit	%
Israel	Holiday/Leisure	71%
	Business/Conference	12%
Islamic Republic of Iran	Holiday/Leisure	74%
	Business/Conference	15%
Saudi Arabia	Holiday/Leisure	51%
	Business/Conference	27%
United Arab Emirates	Holiday/Leisure	55%
	Visiting Friends and Relatives	24%
Lebanon	Business/Conference	40%
	Holiday/Leisure	39%

ASIA		
Nationality	Purpose of Visit	%
India	Holiday/Leisure	51%
	Visiting Friends and Relatives	21%
China	Holiday/Leisure	63%
	Business/Conference	22%
Japan	Holiday/Leisure	56%
	Business/Conference	30%
Republic of Korea (South Korea)	Holiday/Leisure	65%
	Business/Conference	15%
Pakistan	Holiday/Leisure	39%
	Visiting Friends and Relatives	28%
Sri Lanka	Holiday/Leisure	37%
	Business/Conference	34%
Philippines	Holiday/Leisure	47%
	Business/Conference	23%



2.1.8 Extent of Recovery In 2023 Vis-à-vis 2019

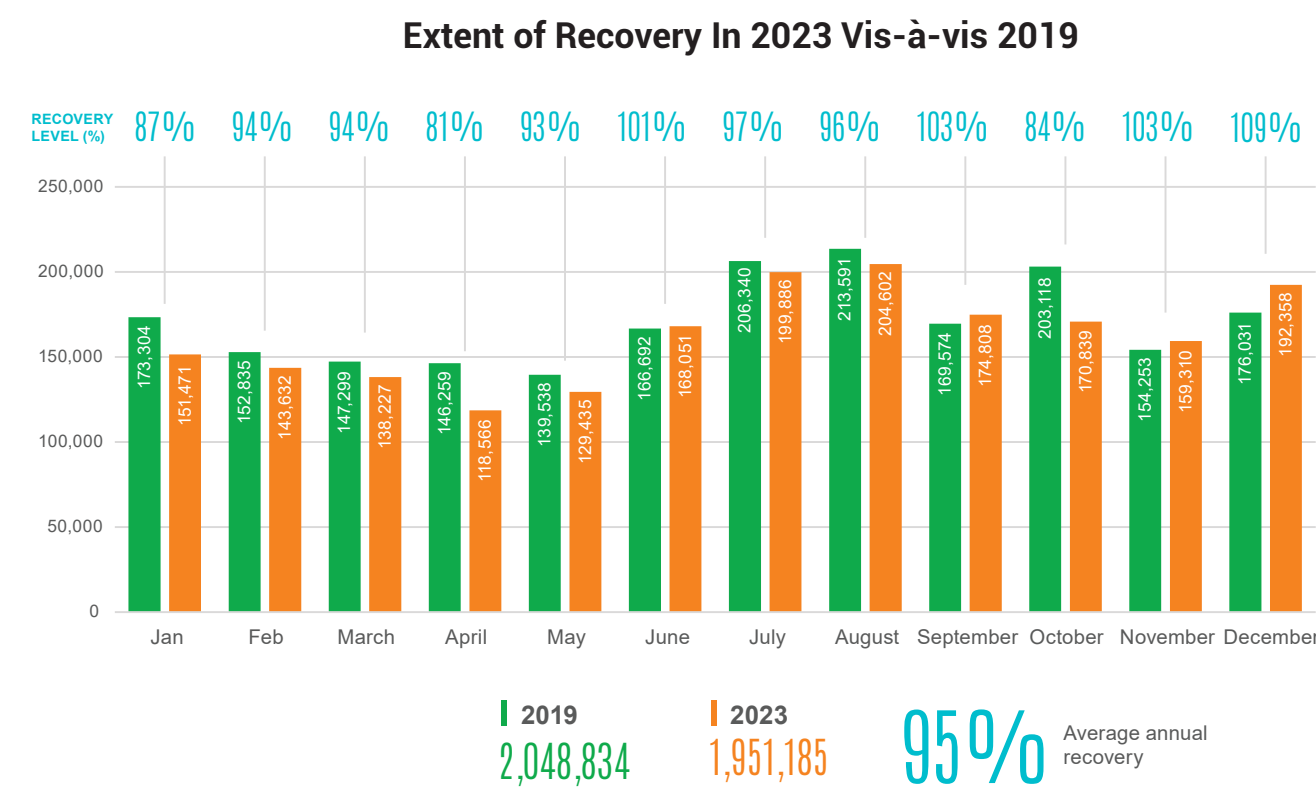


Figure 11: Extent of Recovery In 2023 Vis-à-vis 2019
Source: Directorate of Immigration Services

Before the onset of COVID-19, the number of visitors to the country was slightly over 2 million. The third quarter and fourth quarter of 2023 posted the highest level of recovery at an average of 99% whereas the first quarter and second quarter registered 92% recovery level. The

months of June, September, November and December exceeded the pre-pandemic levels. This was indicative of a gradual substantial progress towards the pre-pandemic visitor arrivals numbers

2.1.9 Cruise Ship Performance

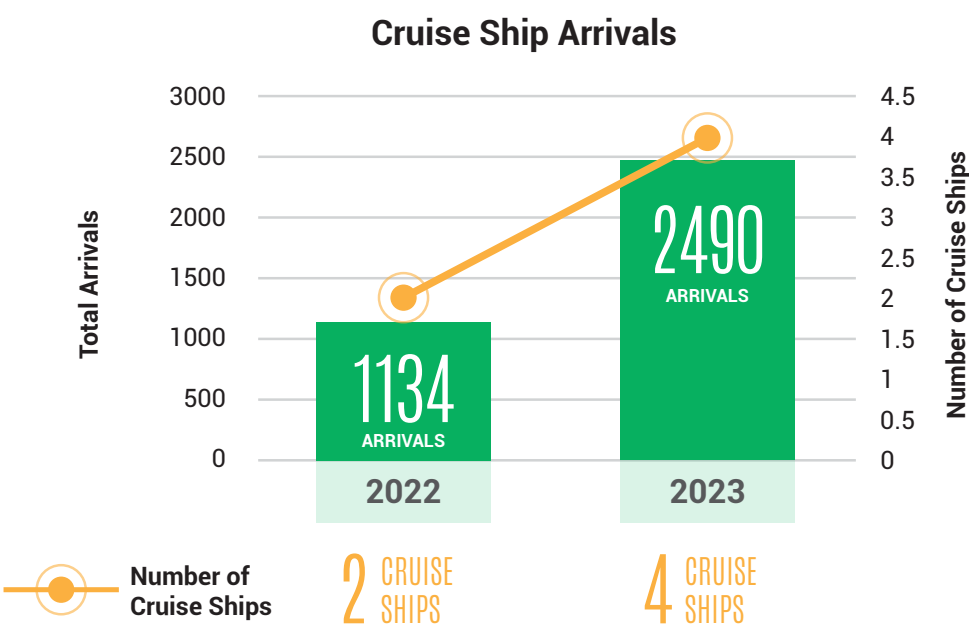


Figure 12: Cruise Ship Arrivals 2022-2023

In 2023, the country received 4 cruise ships, totalling to 2,490 visitors. This represents an increase of 119.6% from 2022 where the country only received 2 cruise ships totalling to 1,134 tourists as shown in Figure 4. This indicates the huge potential cruise tourism has for the destination.

Globally the revenue for cruise tourism was \$25.4Billion in 2023 and it is expected to reach \$36.67Billion in 2028 (Statista 2024). There is a need to strongly market this segment by engaging global players to reclaim Kenya as a cruise hub in the Indian ocean cruise circuit.

2.2 Passenger Flights Landings

2.2.1 Extent of Recovery- 2023 Vis-à-vis 2019

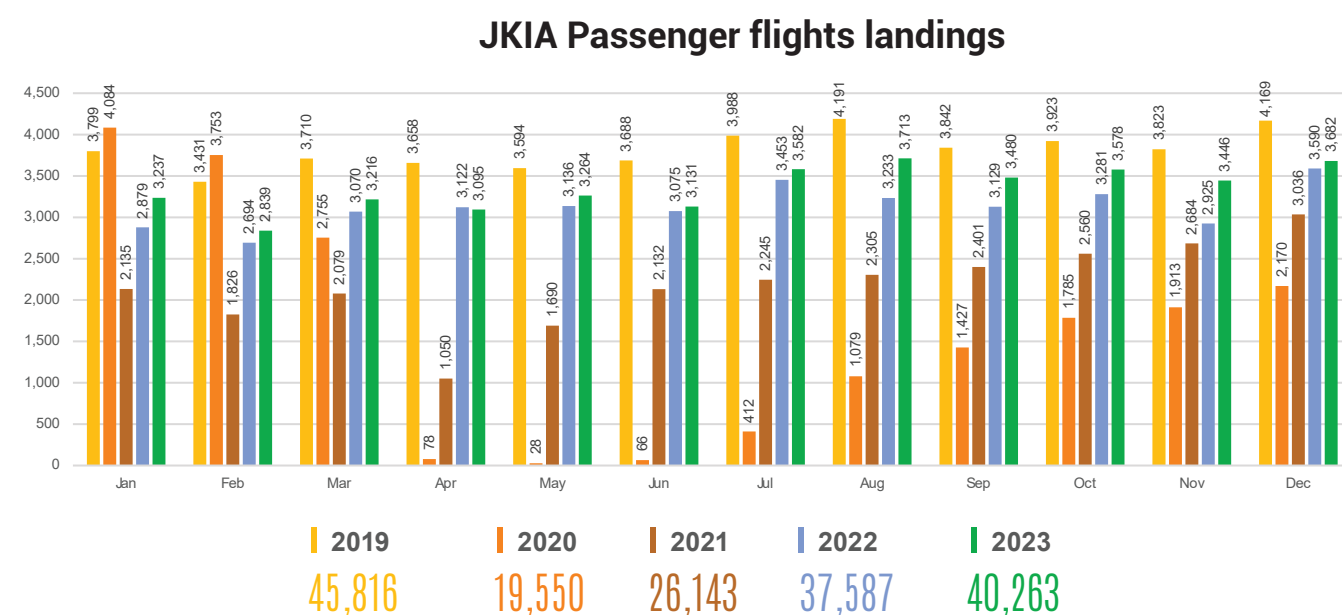
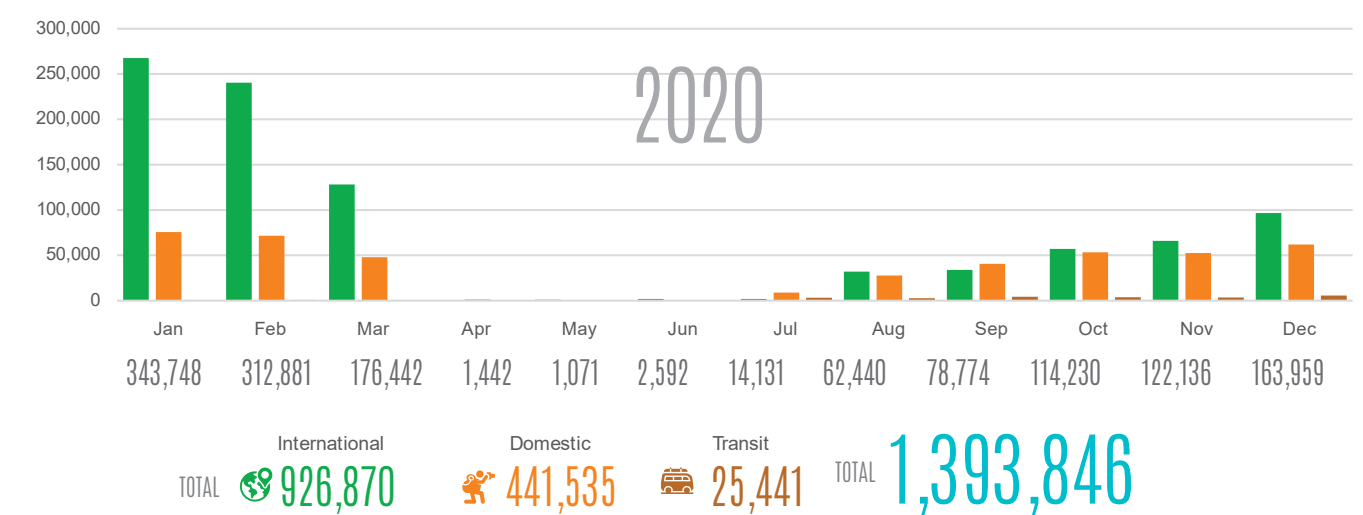
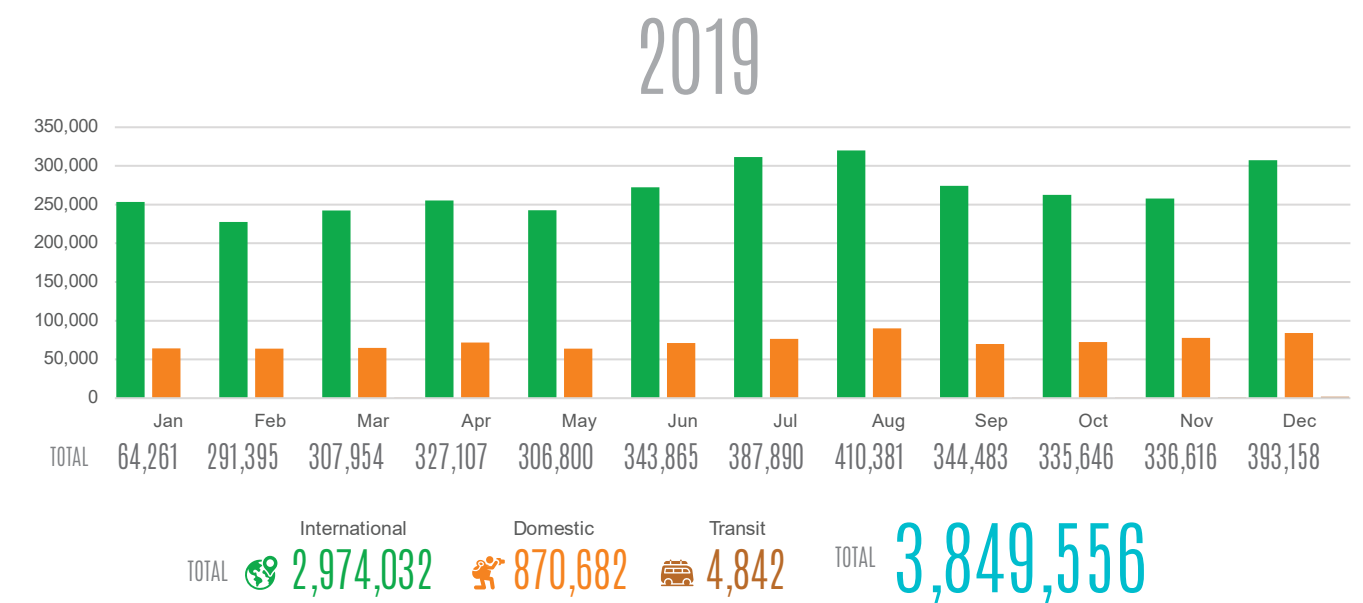


Figure 13: JKIA Passenger flights landings .
Source: KAA

2.3 Passenger Arrivals



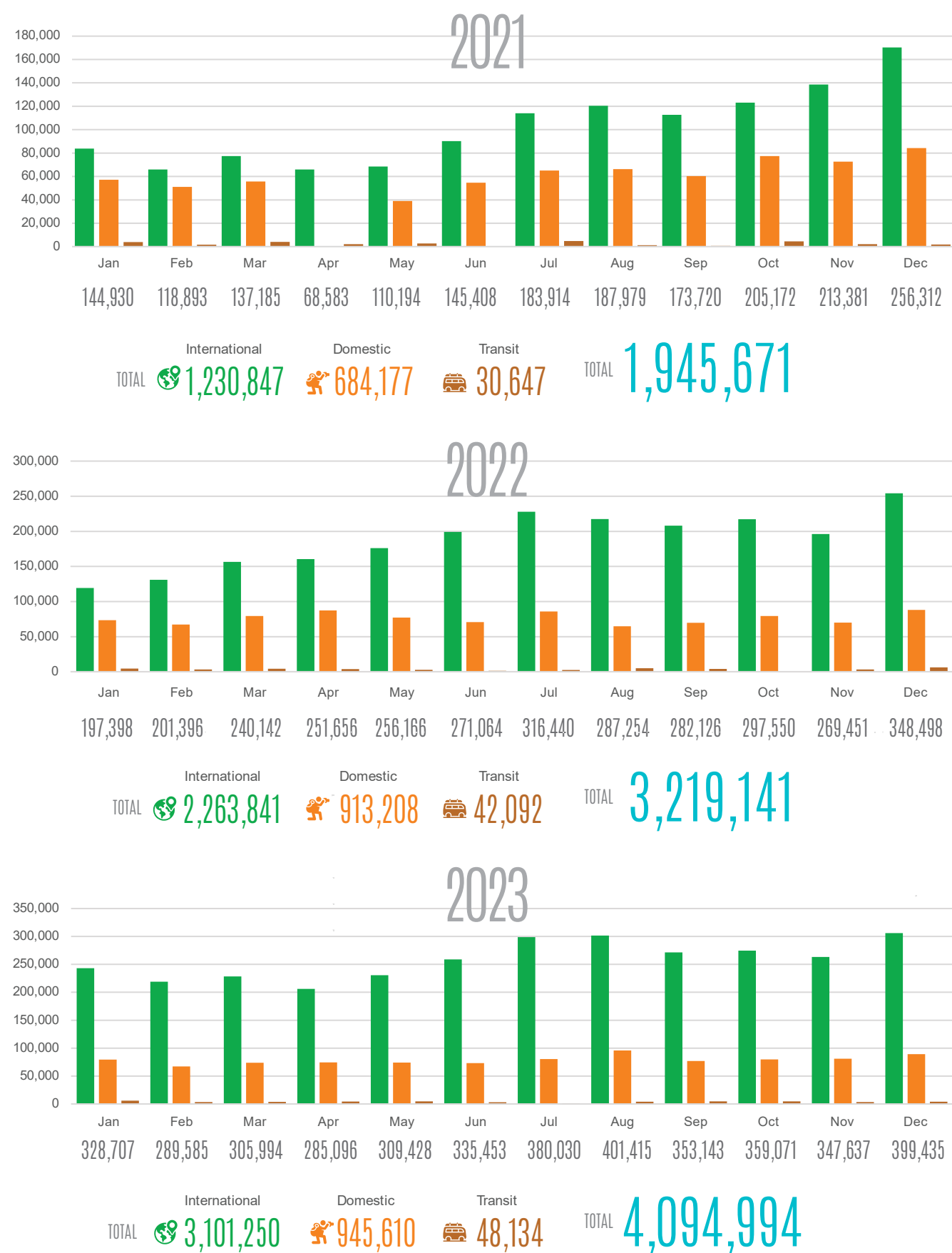


Figure 14: JKIA Passenger Arrivals from the Landings in Table above

Source: KAA

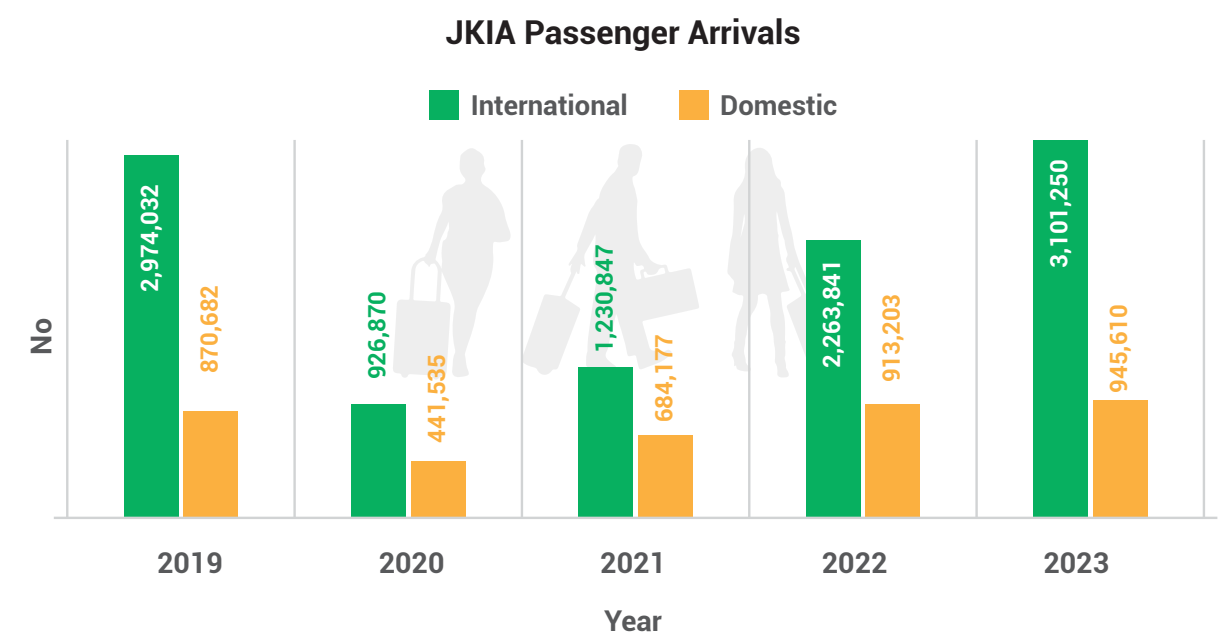


Figure 15: JKIA Passenger arrivals 2019 - 2023

The passenger arrivals linked to the landings detailed in Figure 15 saw a notable 27% increase, rising from 3.2 million in 2022 to 4.1 million in 2023. This indicates that 44% of the arriving international passengers are tourists from various international destinations.

The surge in passenger numbers can be primarily attributed to heightened demand for air travel and events hosted in Kenya, such as the Africa Climate Summit. The passenger performance in 2023 surpassed pre-COVID figures by 6%, underscoring a rise in demand for travel related to tourism.

2.3.1 Specific Airports Performance

a) Flight Landings

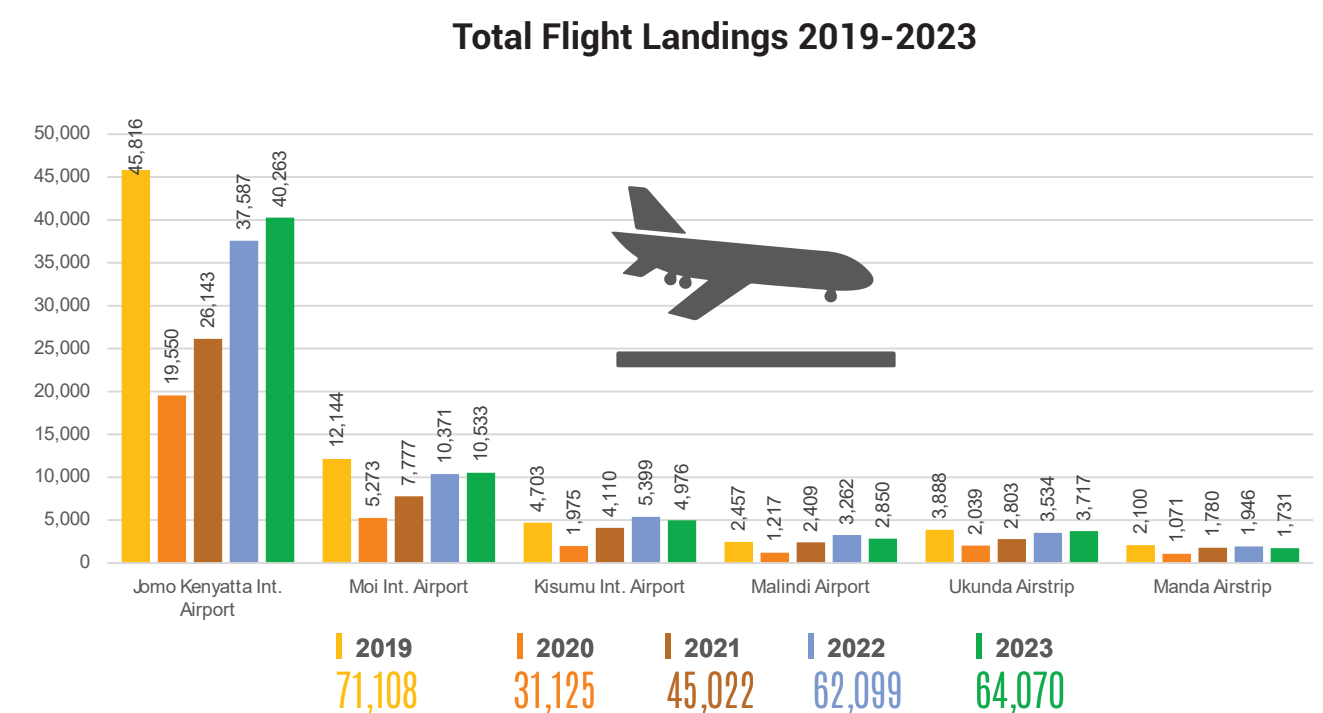


Figure 16: Total Flight Landings 2019-2023

Source: KAA

JKIA experienced a robust 7% growth in flight landings, reaching 40,263 from 37,587 in 2022; however, this figure stood 12% below the pre-COVID-19 performance. MIA achieved a 2% increase in flight landings from 10,371 in 2022, yet it remained 13% below pre-COVID levels.

Notably, Kisumu International Airport surpassed pre-COVID levels by an impressive 6%, while Malindi Airport showed a remarkable 16% growth. However, both still fell short by

8% and 13% compared to their 2022 landings of 5,399 and 3,262, respectively.

Ukunda exhibited a commendable 5% growth from 3,534 landings in 2022, whereas Manda experienced an 11% decline from 1,946 landings in the same period. Both domestic airstrips are striving to recover, standing below pre-COVID performance by 4% and 18%, respectively.

b) Passenger Arrivals

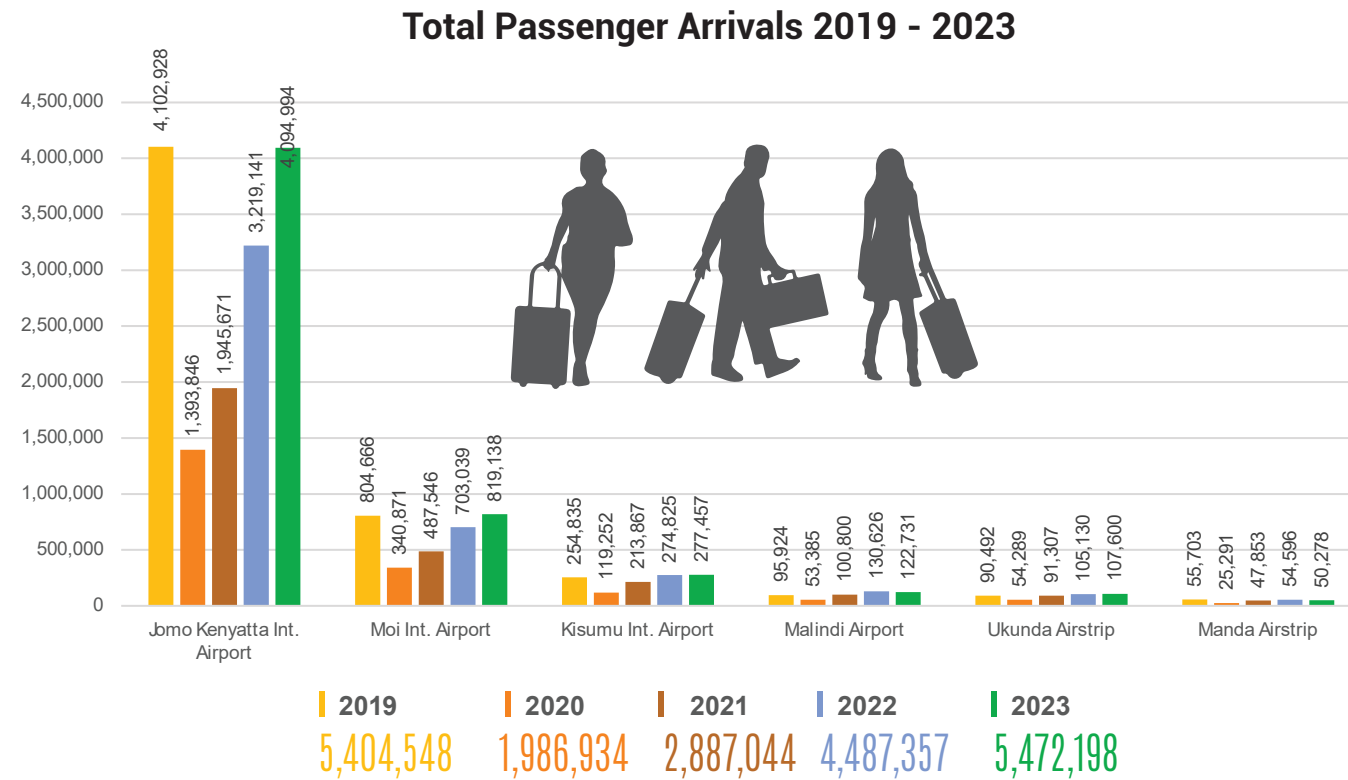


Figure 17: Total Passenger Arrivals 2019 - 2023
Source: KAA

In 2023, JKIA witnessed a remarkable 27% growth in passenger arrivals, increasing from 3.2 million in 2022 to 4.1 million in 2023. While its performance was commendable, it remained just 0.2% below pre-COVID levels. MIA experienced a notable 17% increase in passenger arrivals in 2023, driven by a vibrant domestic sector and surpassing pre-COVID levels by 2%.

Kisumu International Airport consistently outperformed pre-COVID levels by 9%, with passenger numbers growing

by 1% to reach 277,457 in 2023. Despite Malindi surpassing pre-COVID levels by an impressive 28%, there was a 6% decrease in arriving passengers in 2023 compared to 2022.

Manda Airstrip also posted a decline of 8% in arriving passengers, trailing behind its 2019 performance by 10%. Ukunda Airstrip demonstrated a consistent 2% growth in passenger arrivals, with pre-COVID performance seeing an impressive 19% increase, highlighting a surge in domestic traffic.

2.3.2 Dedicated Charter Flight Landings Associated with Tourists Facilitation (MIA)

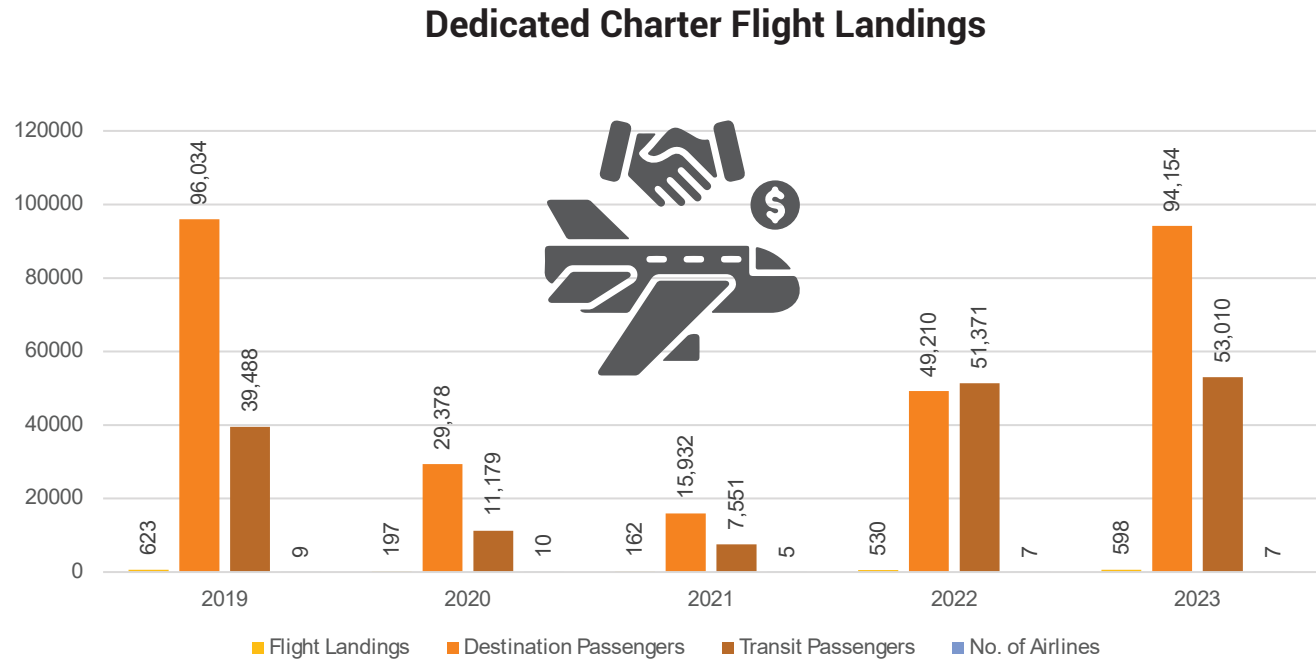


Figure 18: Dedicated Charter Flight Landings
Source: KAA

Moi International Airport stands as a crucial gateway connecting to a myriad of captivating tourist destinations along the coastal region. It beckons travellers with its opulent cultural heritage, pristine white sandy beaches, historic landmarks, and a dynamic atmosphere. Notably, in the year 2023, the international charter carriers dedicated to bolstering tourism at MIA demonstrated impressive growth rates, registering a notable increase of 13%, 91%, and 3% in terms of flight landings, destination passengers, and transit passengers, respectively, in comparison to their 2022 performance.

However, despite this commendable upturn in performance, there exists a marginal lag behind pre-COVID levels. The statistics reveal a 4% deficit in the number of flight landings and a 2% decline in destination passengers when compared with the airport's performance levels before the pandemic. The trajectory of recovery is evident, but there remains a concerted effort to fully reclaim and surpass the pre-pandemic benchmarks.



Tourism Earnings/ Inbound Tourism Earnings

3.1 Inbound Tourism Earnings

In the year 2023 inbound tourism earnings grew up to Kshs.352.54 billion compared to Kshs. 268.09 billion in 2022 indicating a growth of 31.5% as shown in Figure 19.

Inbound Tourism Receipts, 2019 - 2023

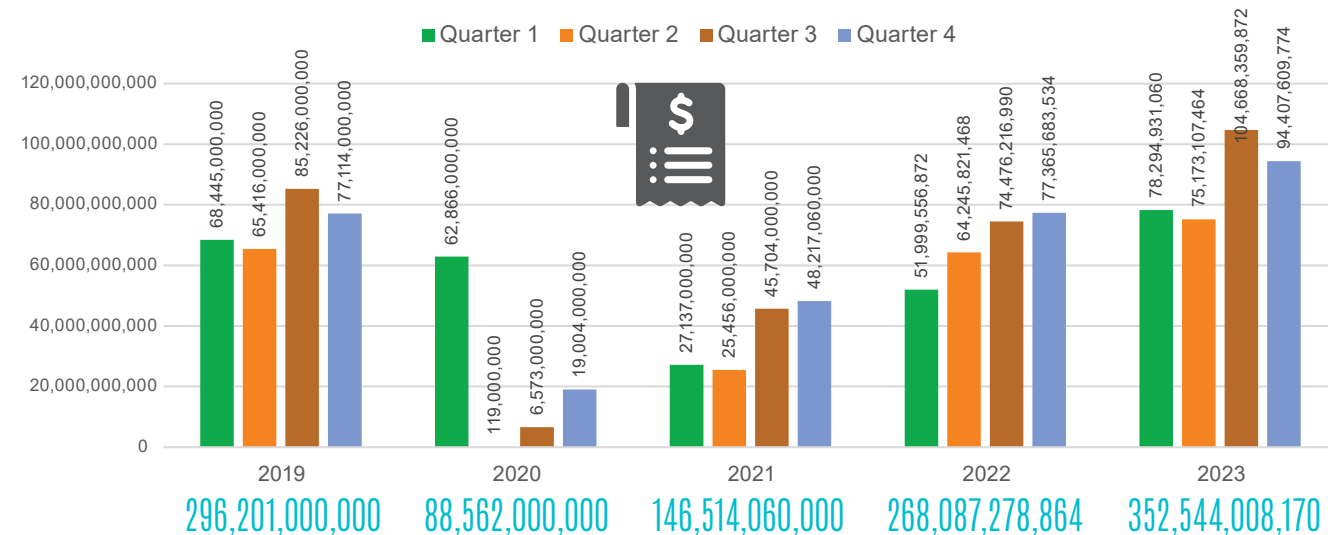


Figure 19: Inbound Tourism Receipts, 2019 - 2023

Source: TRI

The rate of growth in revenues is higher than the growth registered in inbound arrivals an indication of higher per capita spending by arriving tourists. This is also attributed to the sustained weakening of the Kenya shilling against major global currencies and the effects of inflation locally and internationally. Considering the average exchange rate for the US dollar in 2022 and 2023, which was KSh 117.96 and KSh 139.83 respectively, the average per capita expenditure in US dollars was \$1531.72 and \$1292.15

in 2022 and 2023 respectively. Despite the increase in the number of visitors in 2023 as compared to 2022, the average per capita expenditure in US dollars decreased significantly. This suggests that although more people visited in 2023 compared to 2022, they spent less on average during their visits. This is partly attributed to the sustained depreciation of the Kenya shilling against the major currencies during the year.

Bed Capacity,
Bed Nights And
Room Occupancy

4.1 Bed Capacity

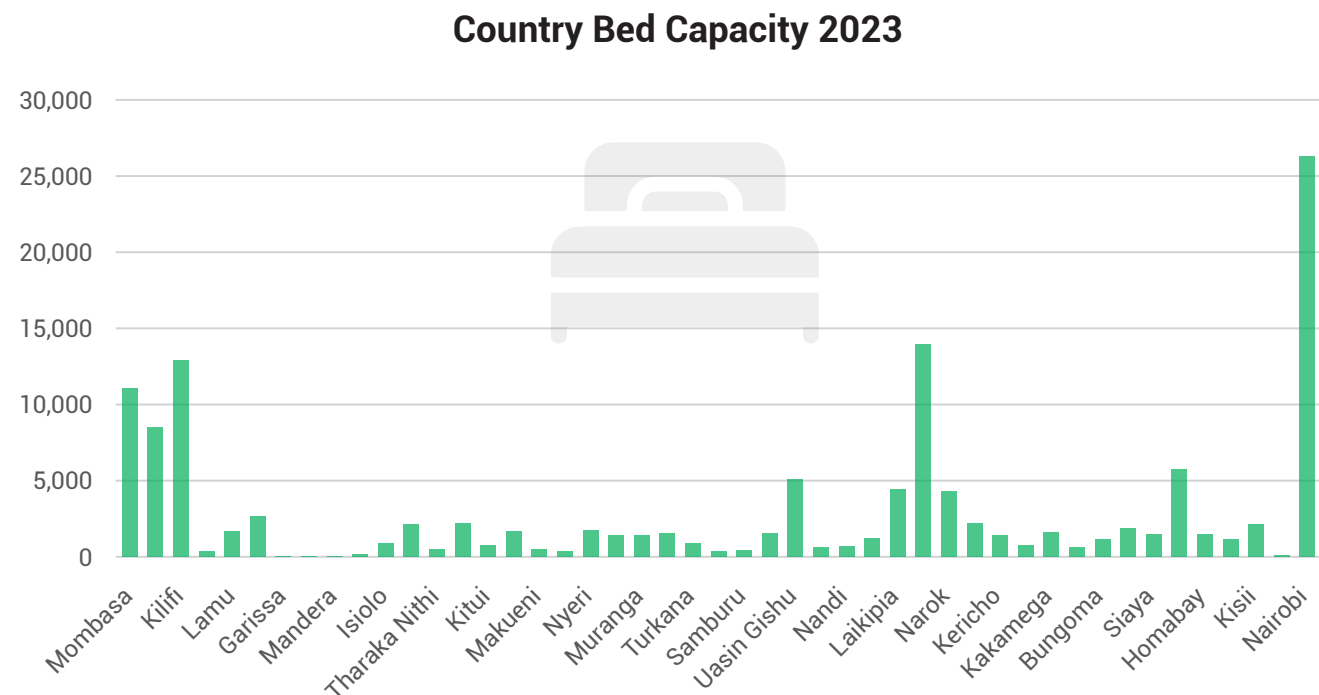


Figure 20: Country bed capacity

Figure 12 provides an overview of the distribution of beds of licenced hotels across different counties in Kenya. Nairobi had the highest number of hotel beds at 19.4%, Nakuru 10.4%, Kilifi 9.6%, Mombasa 8.2%, Kwale 6.3% and Kisumu at 4.3%.

4.2 Bed Occupancy

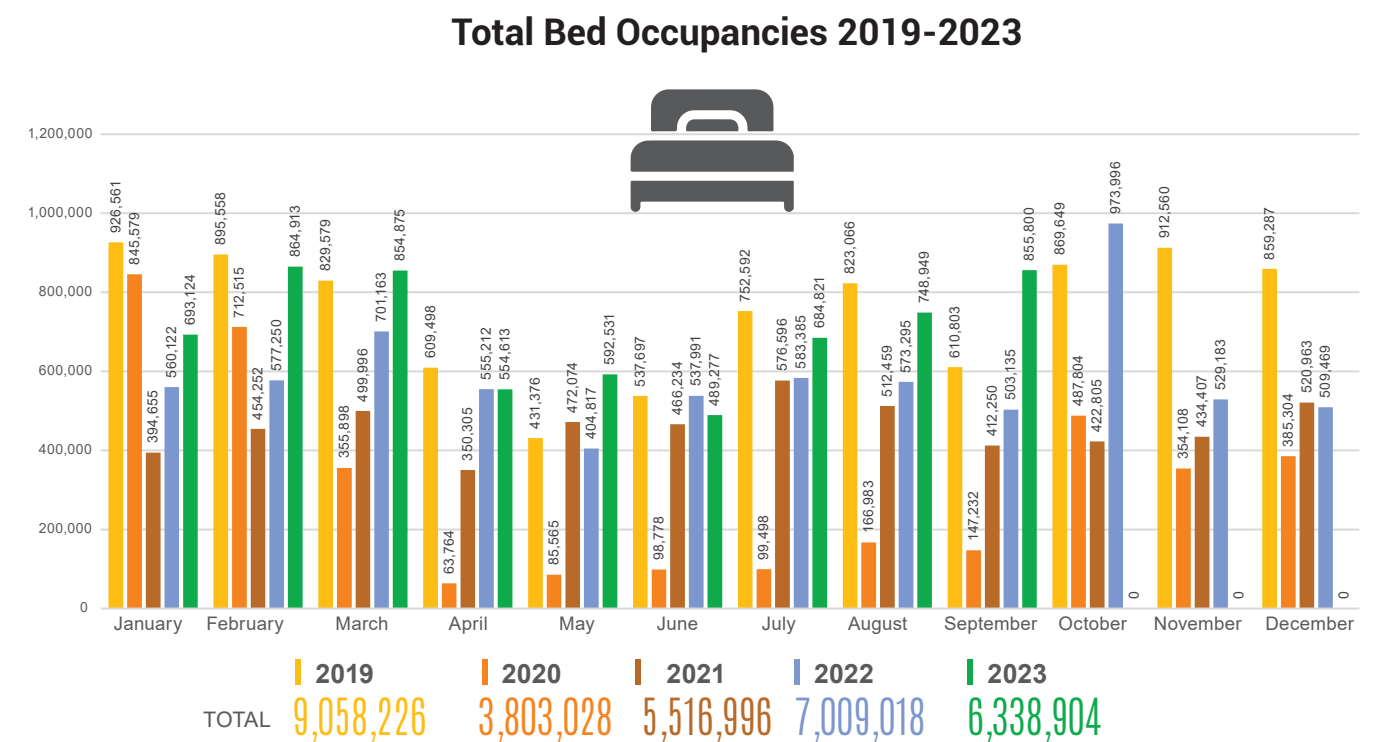


Figure 21: Total Bed Occupancies 2019-2023

Source: KNBS

Figure 21 shows the total bed occupancies from the year 2019 to 2023. During this period bed occupancy rose by 27% from 4,996,370 in the period January to September 2022 to 6,338,904 in the same period during 2023. The improvement in the number of bed occupancy is due to the

rise in the number of visitors arriving and growing domestic tourism activity during the period under review. The rise in bed occupancy can also be seen as a reflection of the growing popularity of the country as a tourist destination.

4.2.1 International Bed Occupancy

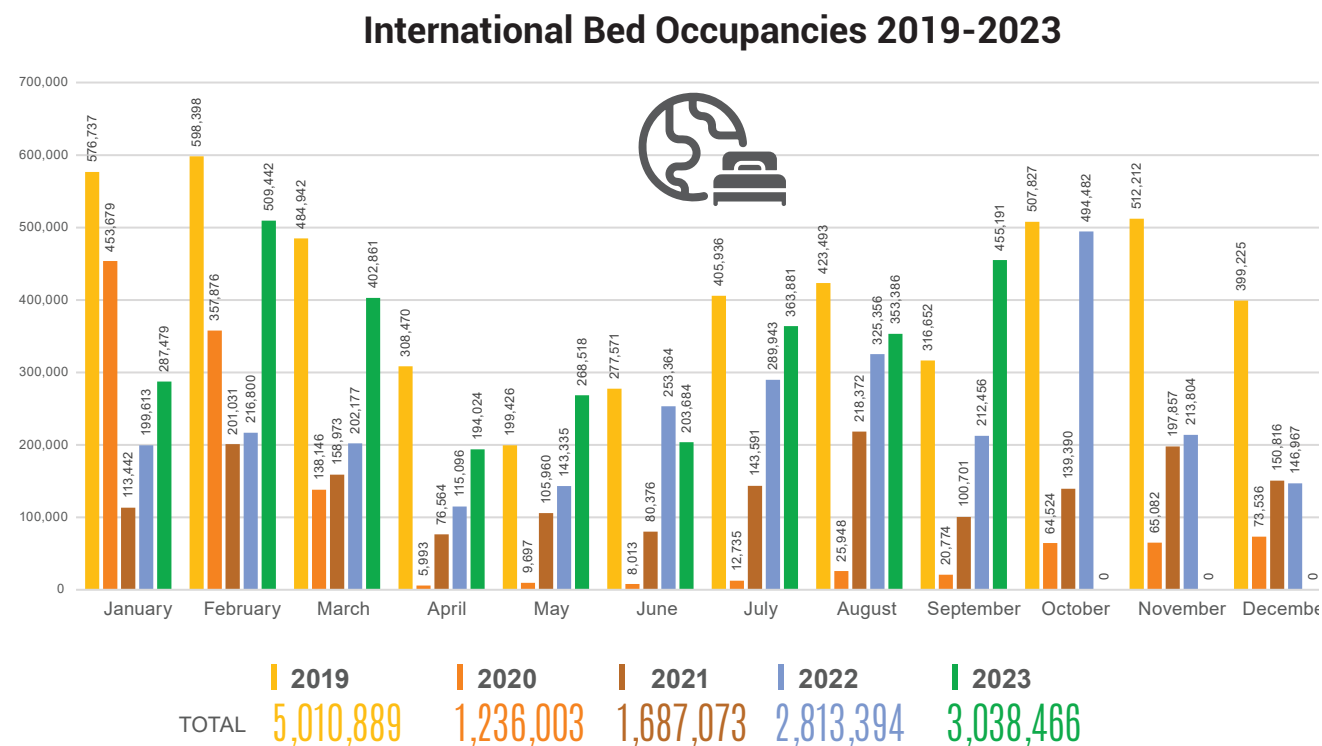


Figure 22: International Bed Occupancies 2019-2023

Source: KNBS

The data presented in Figure 22 highlights the significant changes in international bed occupancies over a five-year period, from 2019 to 2023. The occupancies by international visitors for the months January to September increased from 1,958,140 in the year 2022 to 3,038,466 in the same

period for the year 2023, indicating a growth of 55%. The improvement in the number of international bed occupancy is due to the rise in the number of visitors during the period under review.

Domestic Bed Occupancies 2019-2023

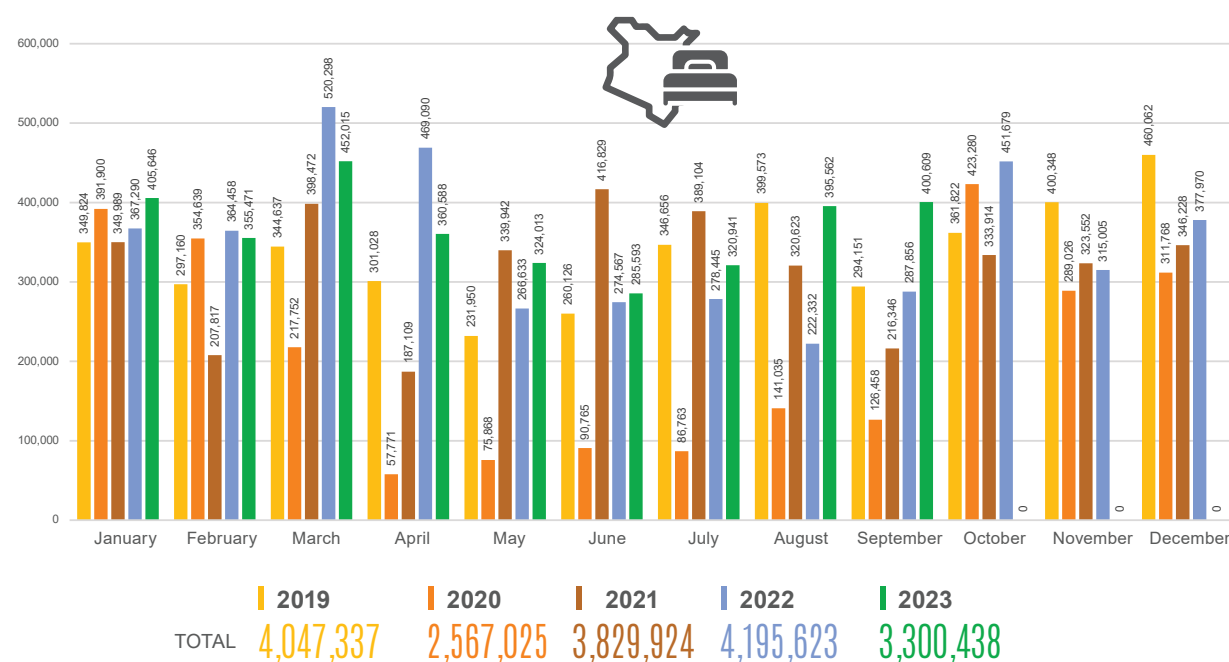


Figure 23: Domestic Bed Occupancies 2019-2023

Source: KNBS

Figure 23 reflects domestic bed occupancy between the years 2019 and 2023. Domestic bed occupancy grew by 8% from 3,050,969 in the months of January to

September 2022 to 3,300,438 in the months of January to September 2023.

4.3 Room Occupancy

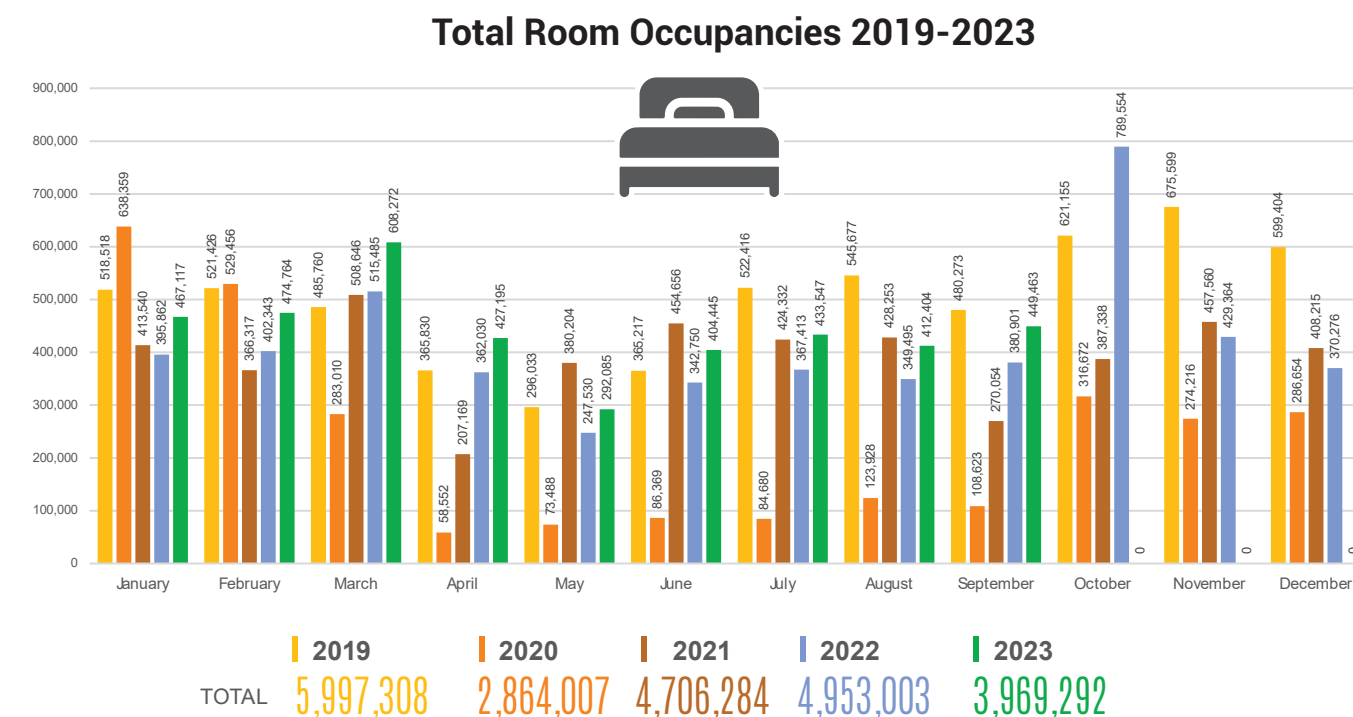


Figure 24: Total Room Occupancies 2019-2023

Source: KNBS

Figure 24 shows room occupancy from 2019-2023. Room occupancy increased by 18% from 3,363,809 in 2022 to 3,969,295 in 2023 from January to September year on

year. This substantial growth indicates expansion in the hospitality sector.



Meetings, Incentives, Conventions And Exhibitions (MICE)

During the year under review, MICE and Business Tourism accounted for 24% of the total tourist arrivals. A comparison with previous year's data shows that Business and MICE's

share has decreased by 3.24%. The sector continues to record a significant growth when compared to pre-COVID period when it accounted for 13.5% of the total arrivals.

5.1 Number of International and local Delegates

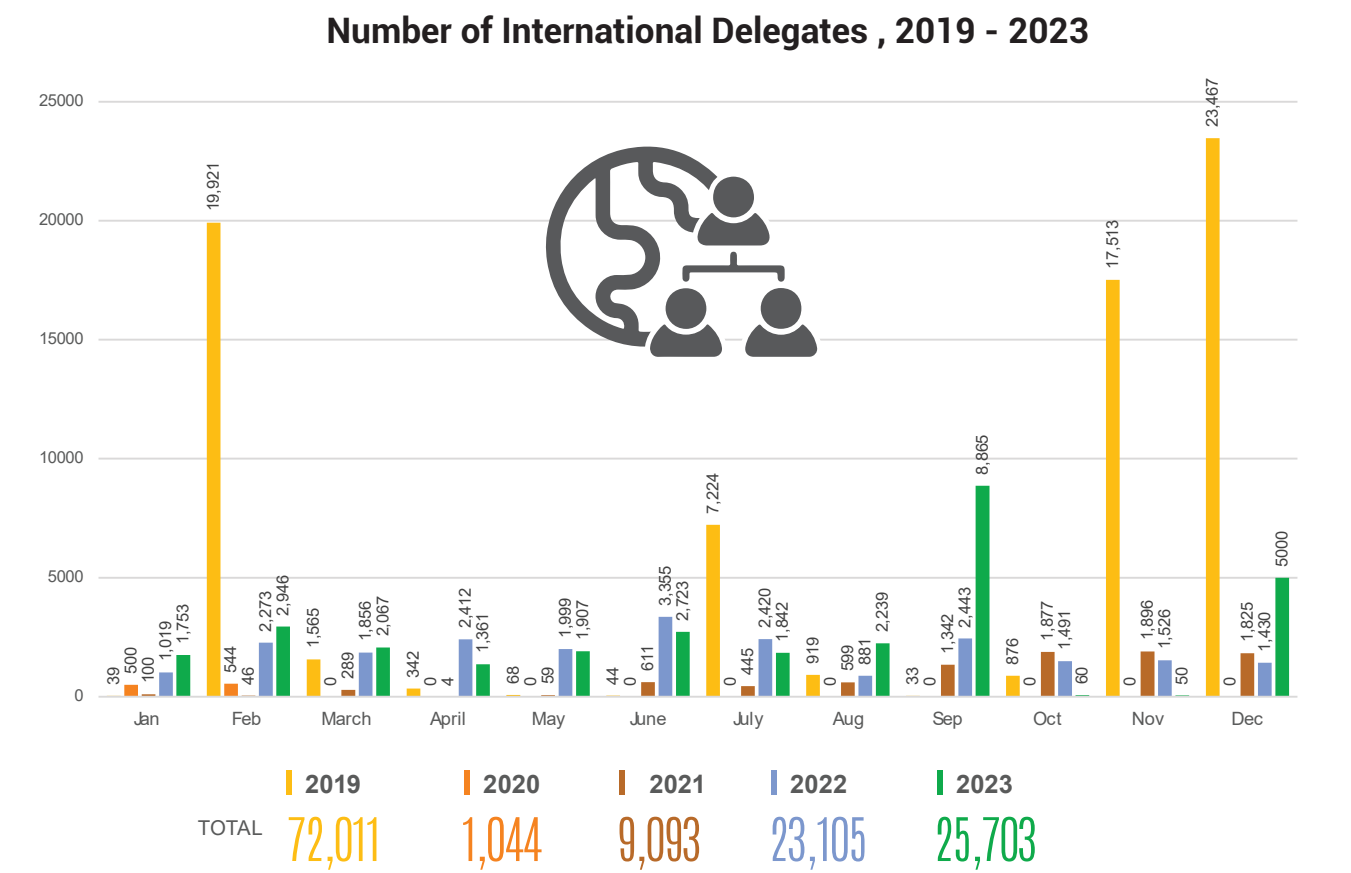


Figure 25: Number of International Delegates , 2019 - 2023
Source: KNBS

In the year 2023, MICE segment recorded 25,703 international delegates which compared with the previous year that recorded 18,658 delegates translated to a growth of 37.75%. The number of international delegates increased during September in the year 2023 triggered by high-profile meetings Kenya hosted during the year. These were the

EU- Kenya Business Forum in Nairobi, Africa Climate Summit and the East Africa Regional Tourism Expo and Magical Kenya Travel Expo and United Nations Habitat Assembly on Urban Agenda.

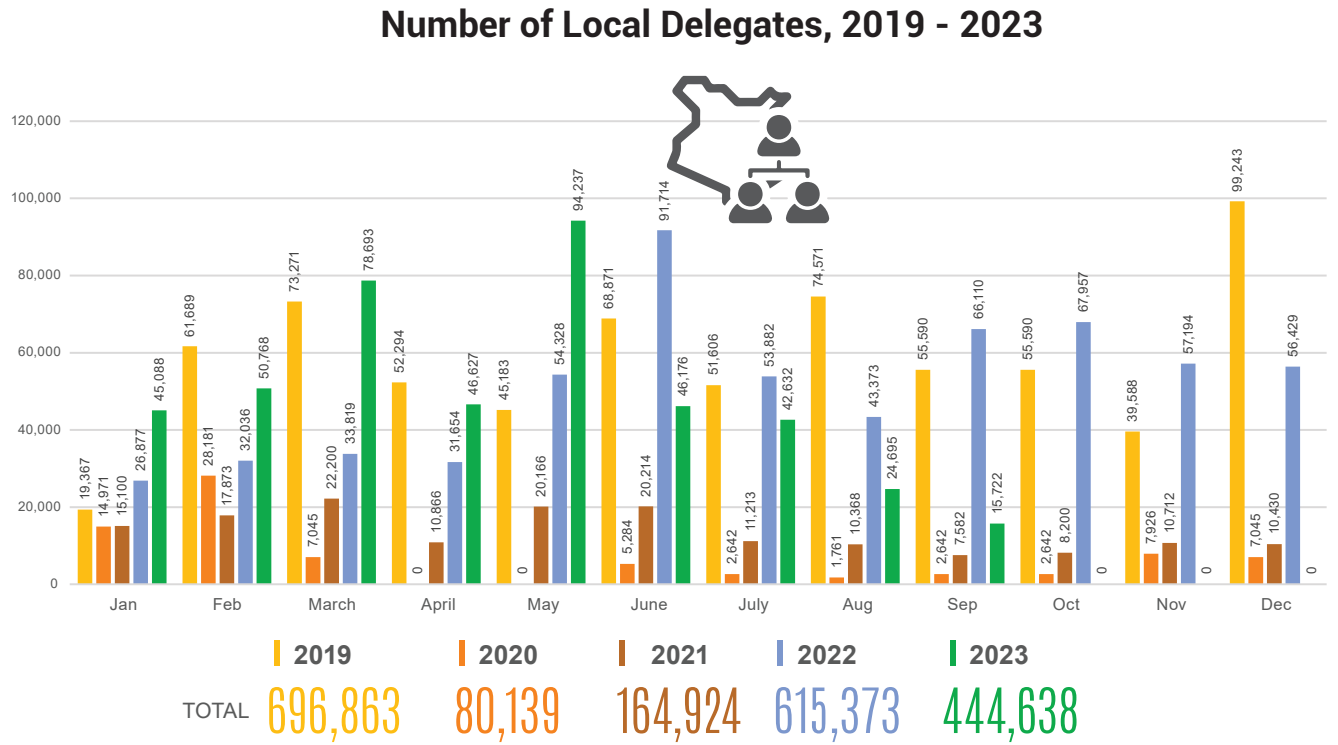


Figure 26: Number of Local Delegates, 2019 - 2023
Source: KNBS

The number of local delegates increased from 433,793 in the year 2022 to 444,638 in 2023 for the period between January and September. This was attributed to increased government promotion, bidding and lobbies that led to

hosting of several high-profile meetings such as the Africa Climate Change Conference and Youth Connect Africa Summit 2023.

5.2 International and Local Conferences

5.2.1 International Conferences

Number of international conferences, 2019 - 2023

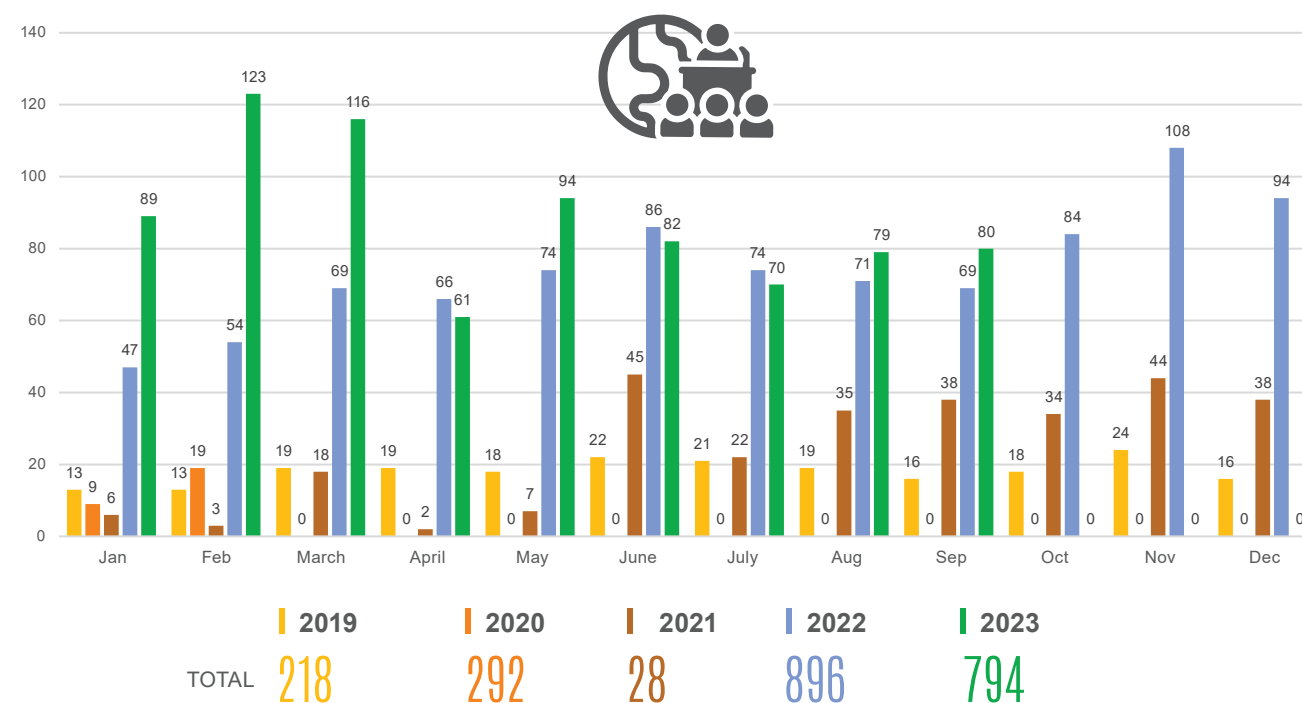


Figure 27: Number of international conferences, 2019 - 2023

The number of international conferences held in the country significantly increased from 694 in the year 2022 to 794 in the year 2023 year on year basis from January

to September. This was largely supported by the increase in visitors' arrivals and the hosting of high profile meetings by the government in the effort to boost MICE business.

5.2.2 Local Conferences

Number of Local Conferences, 2019 - 2023

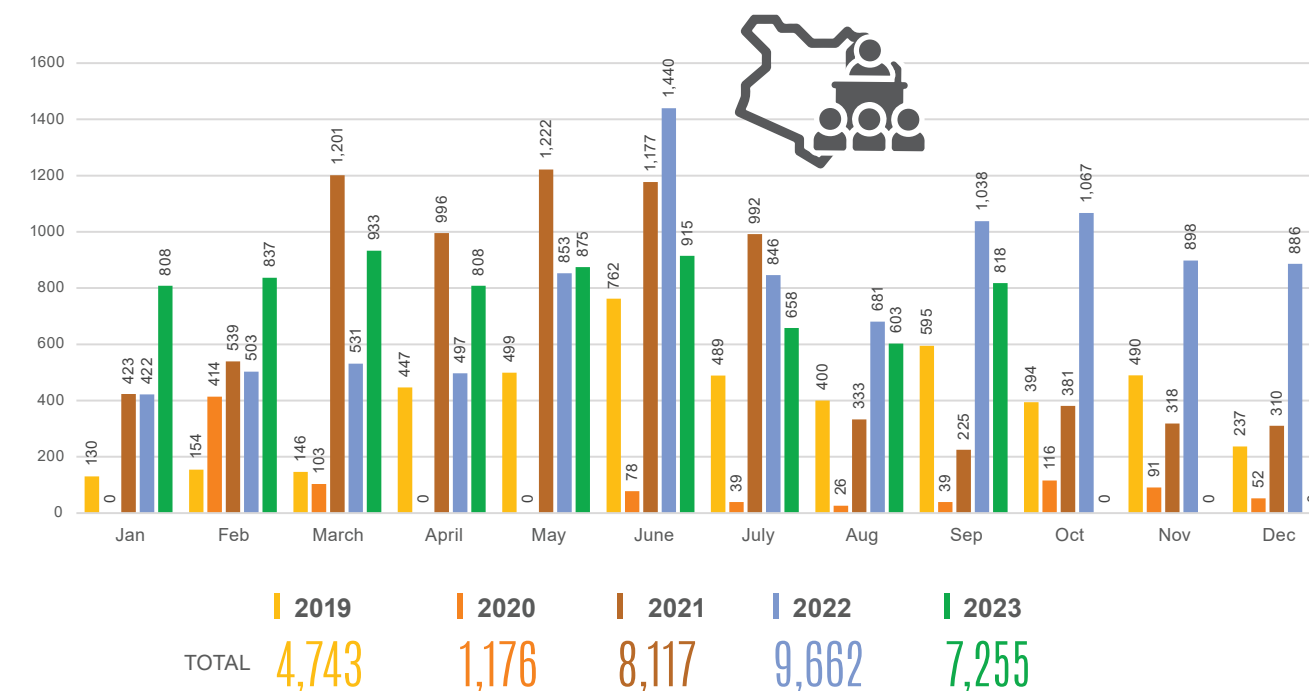


Figure 28: Number of Local Conferences, 2019 - 2023

The number of local conferences held in the country was 7,255 between the periods January to September in the year 2023 compared to same period 2022 that recorded

6,811. The increase was attributed to increased hosting of several high-profile international meetings in the country



Tourism Training Performance

In the year 2023, a total of 2,101 students were trained at Kenya Utalii College in Regular, Part-time, Refresher and Management Development Programs (MDPs). The number of students trained in Regular Programs in hospitality and tourism courses at Kenya Utalii College increased from 431 in 2022 to 484 students in 2023 which represented a 12.3% increase. The growth was attributed to the review of the curriculum. The number of students trained in the Part-time Program was 616 in 2023 and 319 in 2022 which

was an increase by 93% . About 683 students were trained in different categories of Refresher courses in the year 2023 giving an increase of 3.2% as compared to the year 2022, however, this was still below those trained in 2019 which was 1,313. The College in 2023 also trained 318 students in the MDPs which was an increase by 27.2% from 2022. The Figure below shows Kenya Utalii College graduates from 2019 to 2023.

KUC graduates 2019-2023

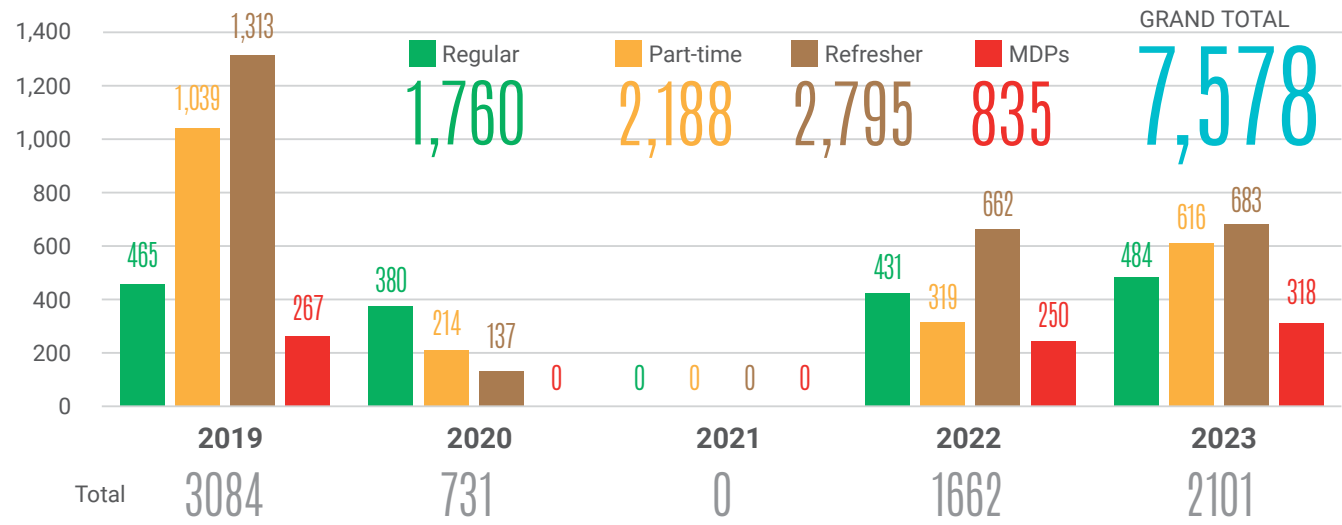


Figure 29: Kenya Utalii College Graduates for the period 2019-2023

07 Visitation To National Parks, Museums And Heritage Sites

7.1 Visitation to National Parks and Reserves

This section provides a comprehensive overview of visitor statistics for 2023 calendar year across all KWS-managed parks, reserves, and sanctuaries. Additionally, it outlines various initiatives undertaken by KWS throughout the year aimed at enhancing visitation numbers and customer satisfaction.

Annual KWS Parks Performance 2019,2022 to 2023

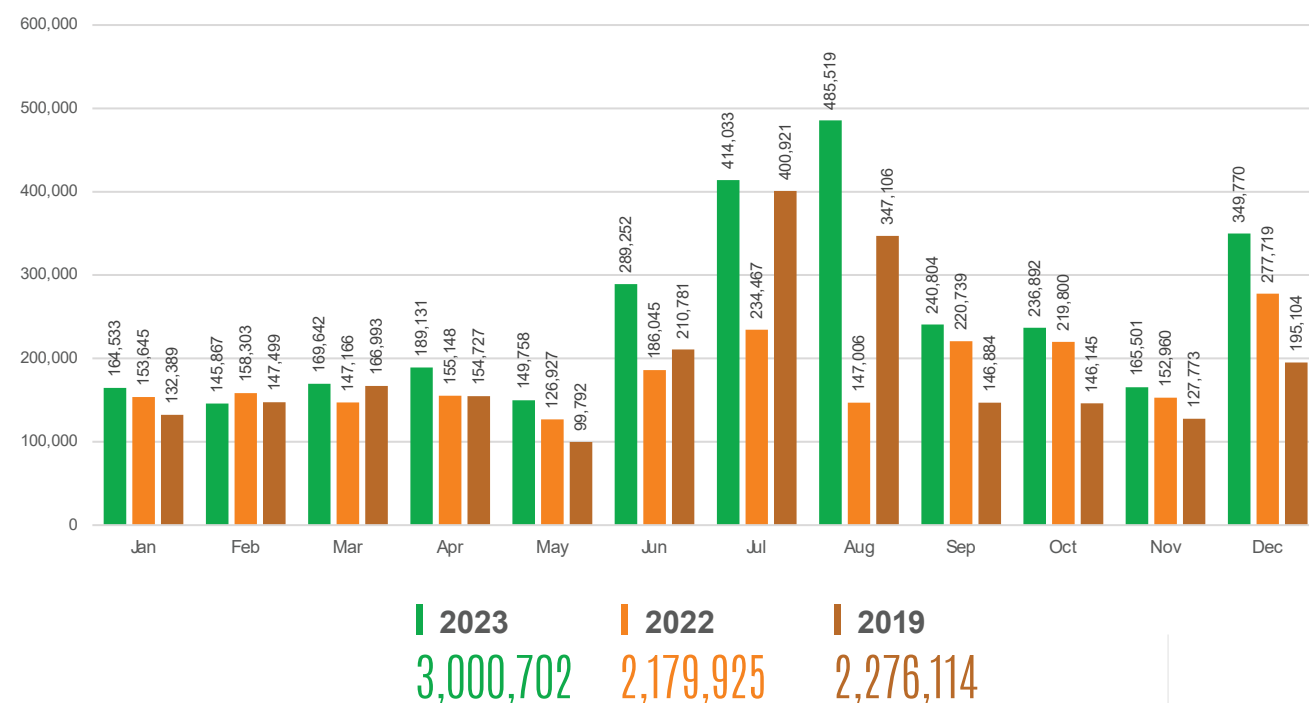
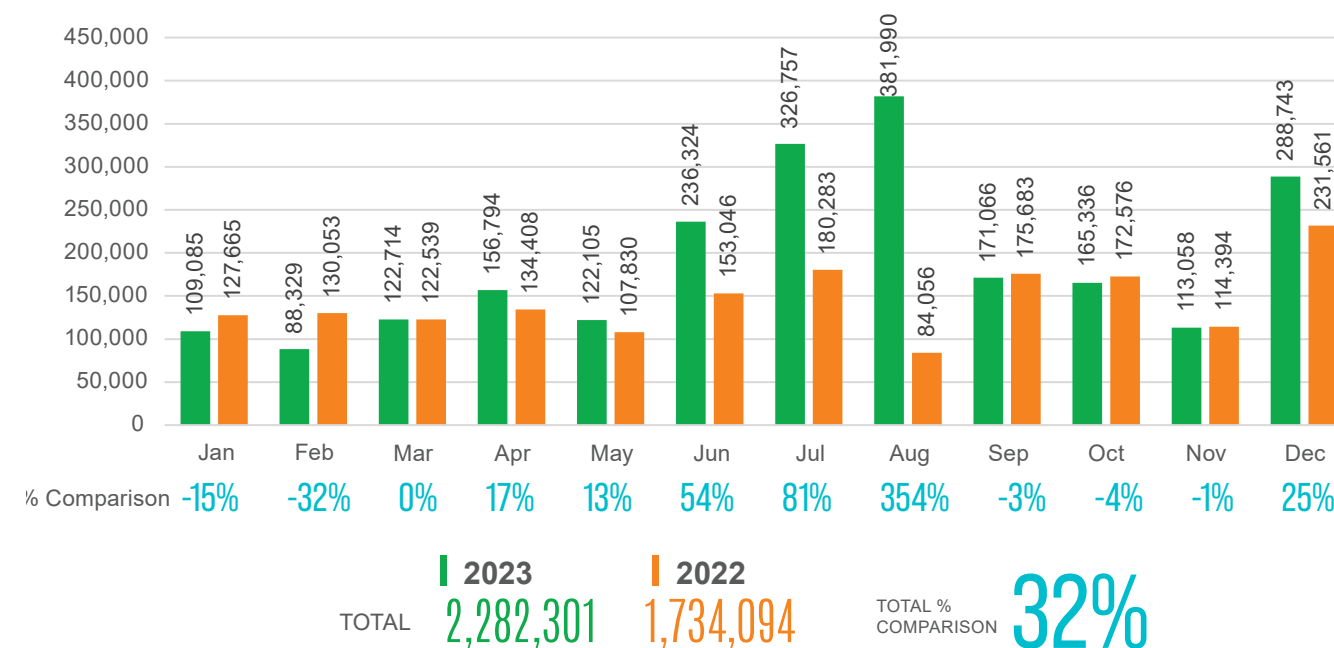


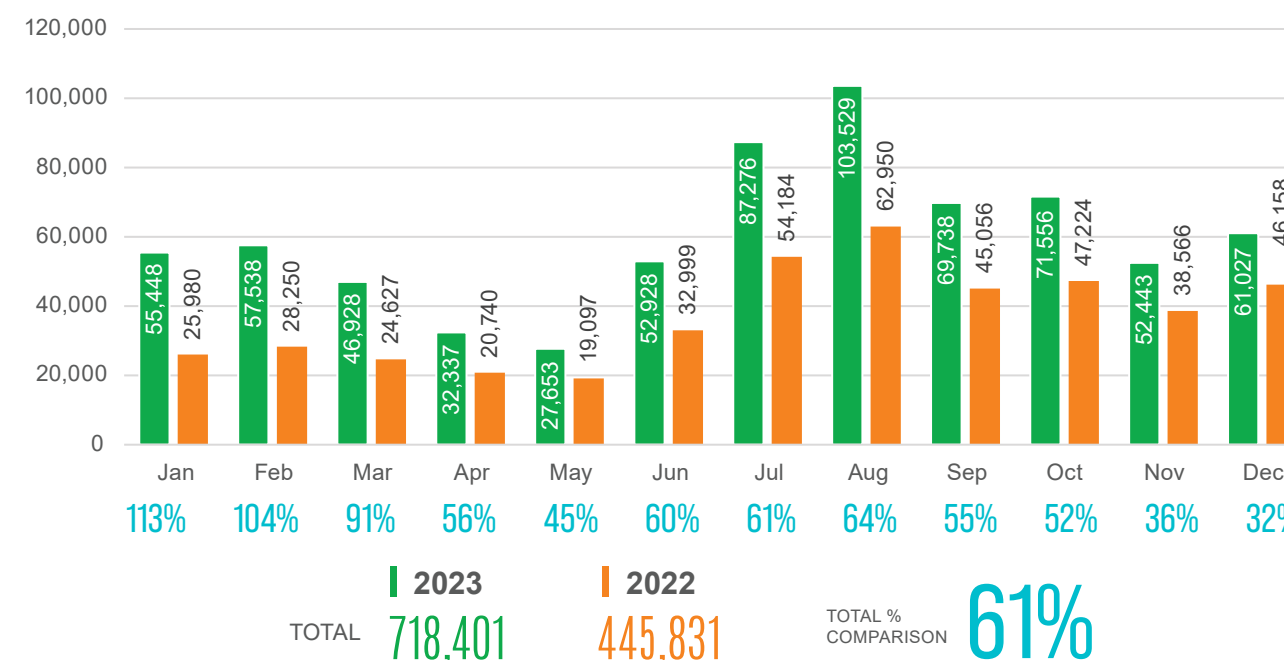
Figure 30: Annual KWS Parks Performance 2019,2022 to 2023

During the reviewed period of 2023, the total number of visitors to KWS Managed Parks, Reserves, and National Wildlife Sanctuaries was **3,000,702**. This signifies a substantial growth rate of 38% increase compared to the 2,179,925 visitors recorded in 2022. The performance of tourism in 2023 surpassed the best year in 2019 by a growth of 32%.

Domestic visitors (citizen and residents)



International Visitors (Non-residents)



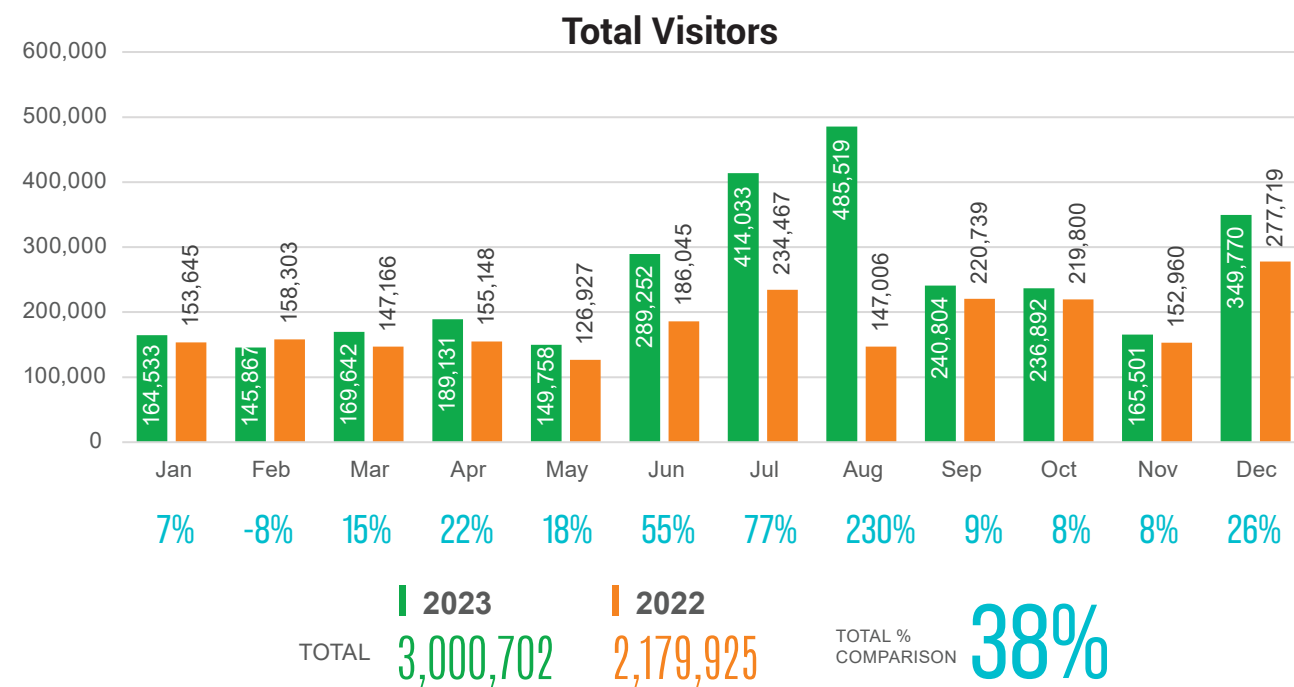


Figure 29: Monthly visitor comparison, 2022 vs 2023

The international market (Non-Residents), demonstrated robust growth in 2023. The number of international visitors surged from 445,831 in 2022 to 718,401 in 2023, indicating a remarkable increase of 61%.

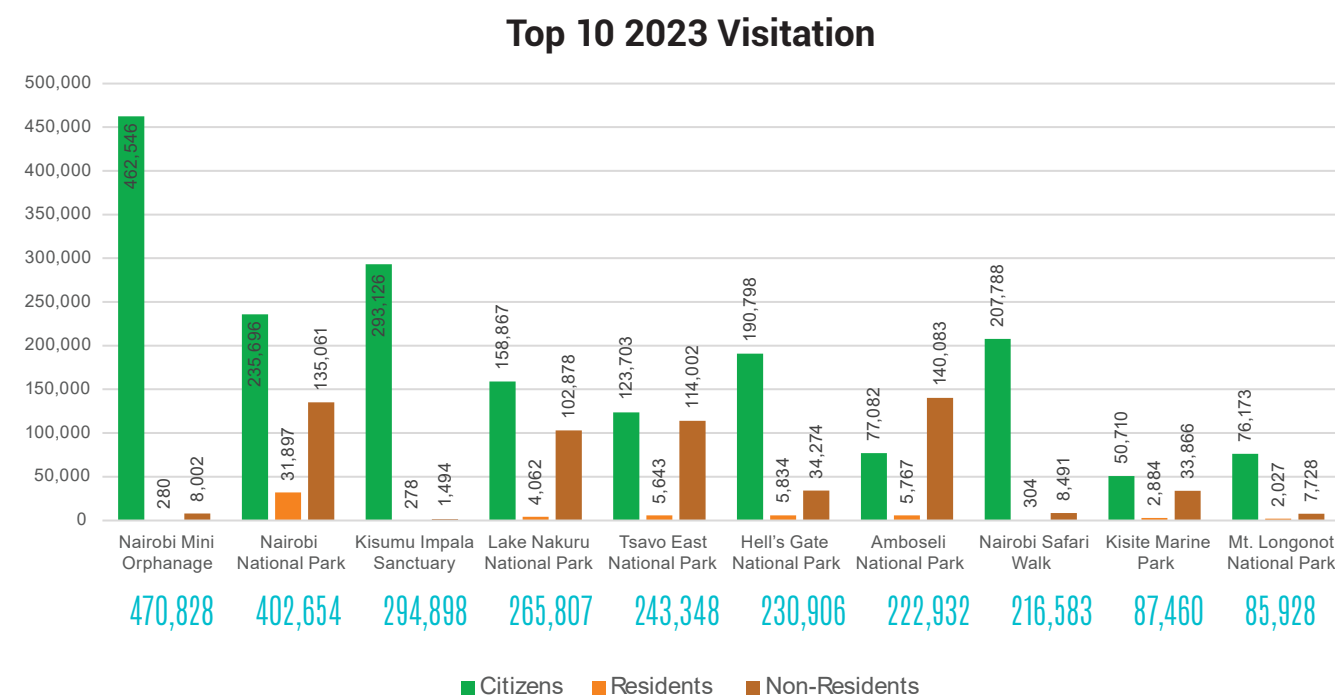


Figure 31: Top 10 2023 Visitation

Reasons for the increase in numbers of visitors to National Parks, Reserves, and Sanctuaries in 2023 Compared to 2022

The substantial growth in visitor numbers and revenue witnessed in 2023 is attributed to several key factors:

- Rebound of International Tourism Source Markets:** Notably, the rebound in international tourism source markets, including major markets like China and Europe, played a pivotal role. The easing of travel restrictions post-COVID-19 allowed for the opening of borders, contributing significantly to the surge.
- Strategic Marketing Initiatives:** Persistent and targeted marketing efforts by KWS and other stakeholders within the tourism industry played a crucial role. KWS, in particular, conducted focused marketing and promotional campaigns. These initiatives aimed to raise awareness about affordable tourism options within the parks, emphasizing budget-friendly accommodations, discounted rates, and special offers.
- Investment in Tourism Product and Infrastructure Development:** KWS invested in enhancing visitor experiences by developing products and infrastructure within the parks. This encompassed the construction of essential amenities such as roads, toilets, and affordable accommodation options like bandas, campsites, and budget lodges, catering specifically to travelers on a limited budget.
- Innovative Packages and Offers:** The introduction of special packages and discounted rates during specific periods, such as off-peak seasons or international days/weeks, played a key role. Notably, an agreement with the Wildlife Clubs of Kenya facilitated minimal entry fees for students, encouraging visits during less busy periods in 2023.
- Collaboration with Travel Trade Partners:** Collaboration with various travel trade partners, including transport providers, hoteliers, and airlines, was instrumental. This partnership allowed KWS to offer affordable transportation and accommodation options to the parks, reducing overall travel costs and enhancing accessibility for budget-conscious tourists.
- Digitalisation of revenue collection:** The integration of all KWS services into the government eCitizen platform proved to be a game-changer. This resulted in increased visitor numbers and a higher uptake of KWS products and services, streamlining the overall user experience.

Highlights of major programmes and other related activities undertaken in 2023 that boosted visitor numbers to KWS parks/reserves and sanctuaries

The remarkable increase in visitor numbers to KWS parks and reserves during 2023 can be attributed to a series of impactful programs and initiatives, including:

- Strategic Partnerships:** KWS forged strategic partnerships with the Kenya Tourism Board, Jambo Jet, Kenya Film Commission, media, content creators and key stakeholders in the travel trade sector as part of a domestic campaign (You Deserve a Holiday Campaign, Zuru Kenya Parks Campaign amongst other) aimed at providing Kenyan travellers with seamless and affordable tourism experiences.

Sales activation and training sessions were also conducted in major towns, targeting major tour operators, safari guides, corporations, learning institutions, and religious groups. Additionally, comprehensive sales visits were carried out at all major Nairobi hotels in June 2023. These initiatives were centred on fostering relationships, building rapport, and identifying partnership opportunities, particularly in the realm of Meetings, Incentives, Conferences, and Exhibitions (MICE) tourism. KWS also supported the travel trade and media fam trips to various parks across the country.

- ii. **Infrastructure Enhancement at Nairobi National Park:** Substantial improvements to the road network, signages, and picnic sites at Nairobi National Park were implemented, enhancing accessibility and improving the overall visitor experience. These enhancements contributed significantly to the surge in visitations especially the domestic market.
- iii. **Out of Home and Outdoor Advertisement** – KWS strategically branded billboards and highway signages for various parks, placing them in high-traffic areas to increase visibility and build brand awareness. This approach successfully attracted more visitors to the parks.
- iv. **Collaboration with Local Hotels and Lodges:** Collaborations with local hotels and lodges were established to offer enhanced tourism products catering to adventure lovers. Partnerships with in parks resulted in the promotion of conferences and unique activities such as night game drives and walking safaris, leading to increased numbers of non-resident visitors.
- v. **Refurbishment of KWS Mbugani Homes:** Across various parks, KWS invested in the refurbishment of Mbugani Homes, self-catering accommodation facilities. This initiative aimed to boost customer satisfaction and provide an enhanced experience for visitors.
- vi. **Free Entry for Kenyan Citizens:** In celebration of Jamhuri Day on December 12, 2023, the government declared free entry for Kenyan citizens into all KWS-managed national parks. This initiative attracted 77,999 citizen visitors who explored various national parks and reserves across the country during the celebrations.
- vii. **Digital Revenue Collection System Implementation:** KWS successfully implemented a digital revenue collection system by integrating with the eCitizen Government payment system, streamlining processes and contributing to the overall increase in visitor numbers.
- viii. **Digital Marketing Strategy:** KWS implemented an enhanced digital marketing strategy to promote its parks and reserves, with a specific focus on creating awareness for lesser-known gems such as Sibiloi,

Ruma, and Shimba Hills National Parks. Engaging social media campaigns, influencer marketing, content creation and targeted online advertising were utilized to showcase the unique attractions and experiences offered by these hidden gems. By leveraging the power of digital platforms, KWS successfully reached a wider audience, sparking curiosity and interest in exploring the diversity of Kenya's less-visited parks.

These digital marketing initiatives not only increased awareness but also provided potential visitors with valuable insights into the distinctive ecosystems and wildlife found in National Parks. The result was a significant uptake in visitation to these lesser-known parks, contributing to the overall success of KWS's efforts in expanding tourism across the country.

- i) **Participation in Major Events & Exhibitions:** KWS actively participated in major events to draw attention to its parks and reserves. Notable engagements included the Safari Rally Championship, East Africa Classic Safari Rally, Kalasha Festival, Tharaka Nithi Cultural Festival, Roan Antelope Marathon and Magical Kenya Tourism Expo amongst others. By aligning with these high-profile events, KWS capitalized on the opportunity to showcase the natural beauty, biodiversity, and recreational offerings of its parks. The interactions generated during these events translated into increased interest and visitation to KWS-managed facilities across the country. This strategic participation in key events contributed significantly to the overall success of KWS's tourism initiatives in 2023.

ii) **Performance Outlook for 2024**

The travel trends for 2024 are anticipated to surpass the achievements of our best year 2023, as indicated by KWS's performance. The industry has shown resilience post-COVID-19, strengthened by strategic investments in marketing and tourism development. KWS projections indicated that both the domestic and international markets will experience notable growth, with expected increases exceeding 10% and 20% in 2024, respectively, compared to 2023.

7.2 Visitation to Museums and Heritage sites

During the year under review, the visitation to museums and heritage sites were 1,109,061. This represents an increase of 30.4% as compared to 2022 where visitation was 850,359. Nairobi National Museums and Snake Park was the most visited museum with a total of 304,363 visitors followed by Kisumu Museums with 198,164 visitors.

Visitation to Museums and Heritage Sites in 2023

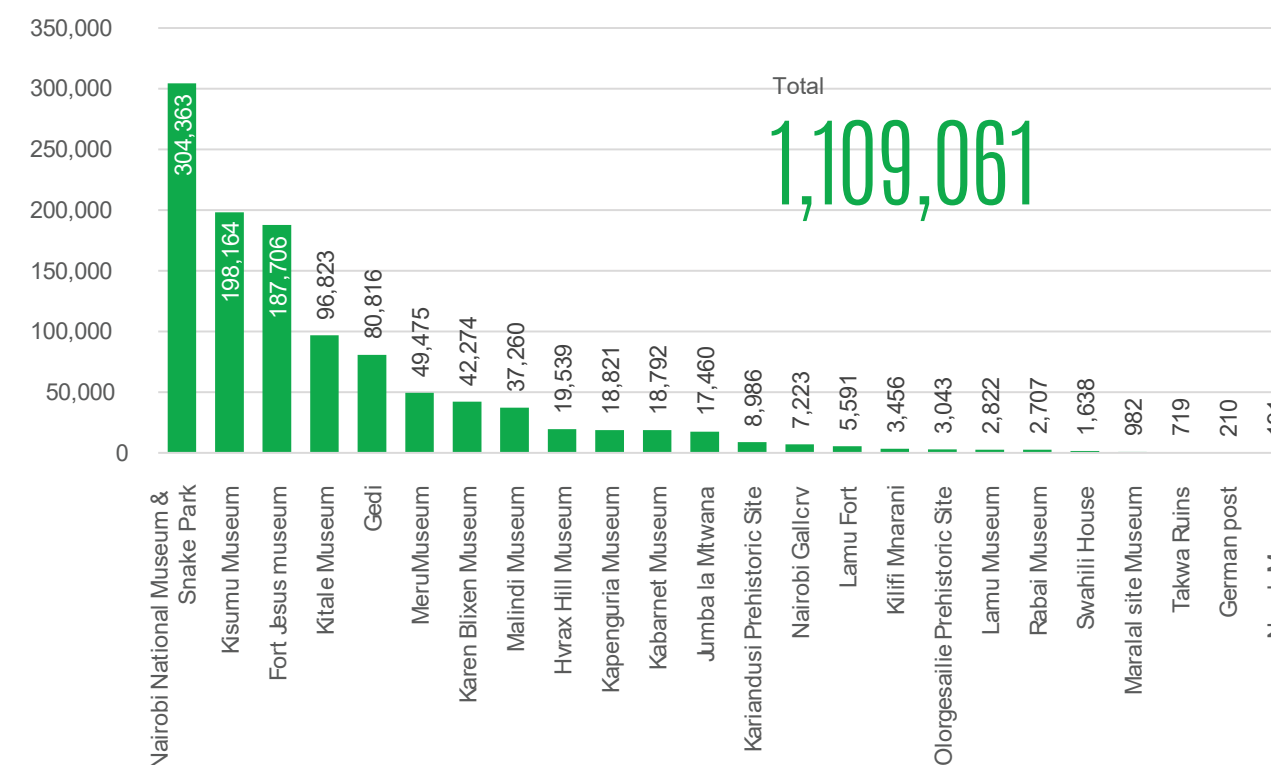


Figure 32: Visitation to Museums and Heritage Sites in 2023



08 International Awards And Accolades

In 2023, Nairobi emerged the top city in the world “Best in Travel 2024” as announced by the United States-based travel agency Lonely Planet. The recognition of the Kenyan capital as the primary city destination for 2024 underscores the government’s steadfast dedication to showcase the nation on the world stage. Lonely Planet highlighted various iconic experiences in Nairobi, including traditional music and dance performances at the Bomas of Kenya, early morning walks in the Ngong Hills Forest offering stunning views of Mount Kenya and Mount Kilimanjaro, exploring Nairobi National Park, and ascending the Kenyatta International Conference Centre for a panoramic city view.

In The World Travel Awards (WTA), 2023, which is an annual event that recognizes and rewards excellence in

the travel, tourism, and hospitality industry, Kenya stood out in various categories. Kenya emerged as a standout destination, achieving numerous accolades, including Africa’s Leading All-Inclusive Resort awarded to Diamonds Dream of Africa, Africa’s Leading Beach Destination to Diani Beach, and Africa’s Leading Business Travel Destination to Nairobi. Notably, Kenya secured Africa’s Leading Destination, with Baobab Beach Resort & Spa named Africa’s Leading Family Resort. Fairmont Mount Kenya Safari Club claimed the title of Africa’s Leading Hotel, while The Residences at Leopard Beach Resort & Spa bagged Africa’s Leading Hotel Residences.



Initiatives Supporting Sector Performance In 2023

In the year under review, the country through Kenya Tourism Board (KTB) launched targeted marketing campaigns across various platforms, including social media, travel websites, and traditional media, which significantly boosted the destination's visibility. These campaigns highlight unique attractions, cultural experiences, and special events that capture the interest of travellers to visit the country. In the marketing activities 2023, the Kenya Tourism Board (KTB) engaged in a comprehensive range of initiatives to promote tourism in Kenya. Notable efforts included hosting familiarization trips for travel advisors from the United States and Canada, organizing press trips for the French market, participating in the International Tourism Bourse (ITB) in Berlin, and collaborating with online travel agencies in France for promotional campaigns. The Board also conducted social media campaigns in European markets, joint promotions with tour operators in the UK, and targeted campaigns in India, China, and other regions.

The Head of State has also played a critical role in pushing tourists' numbers into the country. He has provided great visibility by participating in events such as Maa Cultural Festival, WRC Safari Rally which attracted over 100,000 visitors into the country and Tobong'u Lore cultural festival in Turkana County.

The advocacy for Open Skies by significant players in the tourism industry made some progress in the year 2023. The arrival of new airlines in Kenya plays a crucial role in aviation, utilising scale and efficiencies to offer customers smoother and more budget-friendly travel alternatives. In December 2022, the National carrier Kenya Airways (KQ) commenced direct flights between Mombasa and Dubai. The direct flights have provided a more convenient and efficient travel option for tourists, eliminating the need for connecting flights or lengthy layovers. This increased accessibility has attracted a broader range of travellers who may have been deterred by complex travel arrangements. This, as well has opened up new possibilities for tourism packages and promotional campaigns that highlight the ease of travel. This has stimulated demand by showcasing the Kenya Coast as a more accessible and desirable destination for tourists from the Middle East and beyond. The direct flight service has played a role in elevating the visibility of the region as a key tourist destination. Dubai, being a major global city, serves as a gateway for travelers, and the direct link creates opportunities for marketing and promotion, showcasing the unique attractions and experiences the Coast has to offer. In addition, IndiGo, India's preferred airline commenced new daily direct flights between Mumbai and

Nairobi in 2023. It further connects Nairobi and Jakarta, Indonesia, with direct flights via Mumbai. This strategic air link has fostered increased business collaboration, cultural exchange, and tourism opportunities.

In 2023, the country successfully secured and won bids for hosting prominent conferences, marking a significant achievement in its global presence. These successful bids have not only demonstrated the country's organisational prowess but have also proven instrumental in attracting three high-profile meetings of international significance. As a result, the nation has become a hub for the exchange of ideas, fostering collaboration among leaders and experts from various fields. This commendable accomplishment not only enhances the country's standing on the global stage but also brings forth invaluable opportunities for networking, knowledge-sharing, and fostering diplomatic ties, thereby contributing to its overall growth and influence in the international community.

The country has continuously initiated active conservation efforts to help maintain the ecological balance and preserve the unique ecosystems found in Kenya's wildlife parks and reserves. This preservation has continued to attract nature enthusiasts and ecotourists seeking to experience and appreciate the rich biodiversity and natural beauty of the region. Kenya receives travellers with a keen interest in wildlife conservation and environmental sustainability. This is corroborated in the Exit Survey conducted in April 2023 where a majority of visitors indicated that the other major activity separate from the main purpose of travel was wildlife viewing.

In collaboration with the Council of Governors (CoG), the Ministry embarked on an ambitious project involving the mapping and digitalization of tourism products across all 47 counties. This collaborative effort sought to enhance accessibility and promote the diverse array of tourism offerings throughout the circuits.

Reflecting a commitment to the current administration in line with Bottom-Up Economic Transformation Agenda (BETA), the Ministry proactively diversified tourism products. Departing from the conventional focus on wildlife safari and beach tourism, dedicated marketing efforts went towards the attraction of Free Independent Travellers (FIT). This has resulted in the country receiving a lot of solo travellers.

10 Tourism Projections And Trends

10.1 Projections

The projections were analysed using spreadsheet processing forecasting tool. Forecasting was determined on monthly basis in comparison to previous year same period for the year 2024 based on upper limit. The forecast between 2025 to 2028 was calculated based on annual growth rate for the period between 2023 and 2024. The results from the analysis indicate that, the country will be able to achieve the government vision of attracting 5 million tourists by 2028.

Table 5: Projections Based on Upper Limit

Aspects		Actual				
Visitors Arrivals	Duration	2019	2020	2021	2022	2023
	Quarter 1	473,438	389,590	157,702	287,796	433,330
	Quarter 2	452,489	745	147,933	355,574	416,052
	Quarter 3	589,505	40,743	265,602	412,195	579,296
	Quarter 4	533,402	136,770	299,230	428,187	522,507
	Total	2,048,834	567,848	870,467	1,483,752	1,951,185
Inbound Receipts	Duration	2019	2020	2021	2022	2023
	Quarter 1	68,445,000,000	62,866,000,000	27,137,000,000	51,999,556,872	78,294,931,060
	Quarter 2	65,416,000,000	119,000,000	25,456,000,000	64,245,821,468	75,173,107,464
	Quarter 3	85,226,000,000	6,573,000,000	45,704,000,000	74,476,216,990	104,668,359,872
	Quarter 4	77,114,000,000	19,004,000,000	48,217,060,000	77,365,683,534	94,407,609,774
	Total	296,201,000,000	88,562,000,000	146,514,060,000	268,087,278,864	352,544,008,170.00

Aspects		Forecast				
Visitors Arrivals	Duration	2024	2025	2026	2027	2028
	Quarter 1	534,969	654,163	799,937	978,222	1,196,276
	Quarter 2	471,905	560,305	656,147	753,571	862,937
	Quarter 3	727,314	900,072	1,113,967	1,378,818	1,706,795
	Quarter 4	647,183	845,587	1,106,503	1,450,145	1,903,422
	Total	2,381,371	2,960,127	3,676,553	4,560,756	5,669,430
Inbound Receipts	Duration	2024	2025	2026	2027	2028
	Quarter 1	96,659,268,858	118,195,479,166	144,534,147,487	176,747,091,508	216,145,535,115
	Quarter 2	85,264,739,210	101,237,028,010	118,553,868,535	136,156,778,393	155,917,104,649
	Quarter 3	131,412,548,148	162,626,809,104	201,273,781,489	249,127,668,218	308,387,195,299
	Quarter 4	116,934,318,806	152,782,350,334	199,925,133,537	262,015,064,434	343,914,033,467
	Total	430,270,875,022	534,841,666,614	664,286,931,049	824,046,602,553	1,024,363,868,530

10.2 Global Tourism Trends in 2024

1. Wellness and spa hotels

The current trend revolves around preventative medicine and self-care, with the wellness industry experiencing significant growth, now constituting a trillion-dollar market. Hospitality venues, particularly those equipped with spa facilities, are strategically positioned to capitalize on this trend. Beyond traditional spa services focused on beauty and relaxation, there is a rising demand for health diagnostic technology and personalized treatment plans.

2. Boutique hotels

Boutique hotels, catering to affluent jetsetters and high-spending tourists, have gained popularity for their unique features such as distinctive interior decoration, specially designed rooms, exclusive lounge bars, and a diverse range of food and beverages. Typically accommodating between 10 to 15 rooms, these hotels can be converted from various structures, including old buildings, castles, historic sites, monasteries, villas, or large old farmhouses, unlike traditional hotels. These establishments are not confined to trendy tourist destinations, as they can be found in diverse locations such as the seaside, mountains, lakes, or the countryside.

3. Sustained Technology

In recent years, hotels have increasingly integrated technology to enhance the leisure experience for guests, recognizing the changing expectations of modern clientele. Travel technology trends represent the latest digital and technological solutions advancements in the travel industry. They are important for enhancing customer experience, streamlining operations, and providing new opportunities for personalization and efficiency in travel planning and management. The following are some the technologies to be considered for a competitive destination;

Sustainable Technology: Prioritises sustainable fuel for cruises and airlines and renewable energy for hospitality, aligning with environmental awareness.

Artificial Intelligence & Big Data: Spotlights AI in customer service, such as chatbots, and the role of big data in tailoring travel experiences and business analysis.

Augmented and Virtual Reality: Concentrates on AR for enriching real-world travel experiences and VR for virtual tours, enhancing customer engagement.

Mobile Technology: Increasing dependence on smartphones for travel bookings, check-ins, and digital travel guides.

Internet of Things (IoT): Utilisation of IoT for personalised room configurations in hotels and real-time luggage tracking.

Biometrics: Integration of biometric technology for quicker and more secure identification at airports and hotels.

5G Connectivity: Boosts mobile internet speed, enhancing online travel services and communication.

Voice Technology: Rising adoption in search and booking procedures for hands-free, convenient travel planning.

Blockchain Technology: Provides secure, transparent transactions in travel bookings and loyalty programmes.

4. Sustainable Tourism

Sustainability is gaining widespread attention across various industries, including hospitality and tourism. Consumers and businesses show a growing interest in incorporating sustainable practices. While discussions about the importance of sustainability have been ongoing, the current emphasis on it is unprecedented. Consumers increasingly anticipate businesses, including those in the hospitality and tourism sector, to adopt environmentally friendly measures. This has led the industry to reevaluate and strengthen its commitment to sustainability, moving beyond basic initiatives like towel reuse. Guests now expect comprehensive sustainability efforts, ranging from the use of solar panels for energy to sourcing local ingredients for restaurant menus. The focus on sustainability is not merely a passing trend; it appears to be a lasting shift in industry priorities.

Conclusion And Recommendations

11.1 Conclusion

The data presented suggests that Kenya's tourism sector has rebounded strongly from the challenges posed by the COVID-19 pandemic. The significant increase in tourist arrivals, international delegate numbers, and positive recognition in awards indicate successful recovery efforts

and effective marketing strategies. The country's ability to almost gaining pre-pandemic global recovery rates and achieve high levels of tourist satisfaction and engagement is a positive sign for the overall health and resilience of Kenya's tourism industry.

11.2 Recommendations

01 Visa Openness

Africa is making strides in its visa openness policies which bodes well for cross-border travel, ease of movement and trade in 2024 and beyond.

Following declaration by His Excellency the President that Kenya will be a visa-free country, the Directorate of Immigration Service streamlined the process by introduction of Electronic Travel Authorization (eTA). Continued efforts to enhance travel policies and Immigration procedures contributes to fostering a conducive environment for tourism, trade and investment in Kenya and the broader African region. This unlocks the full potential of cross-border travel and economic cooperation, promoting tourism and business travel.

02 Aggressive Marketing

It is recommended that a Multi-Channel Campaigns and implementation of aggressive marketing strategies across various platforms, including social media, travel websites, and traditional media. The destination should as well utilize international influencers, engaging content, and targeted advertisements to increase visibility and attract a diverse global audience. This should be regularly assessed to adapt to marketing approaches based on performance analytics to optimize results. Establishing marketing offices in key source markets will allow for targeted promotion and communication. These offices located in various embassies and high commission offices can engage with local travel agencies, collaborate with influencers, and conduct market research to tailor marketing campaigns effectively. Launching a dedicated tourism TV station is recommended. It can provide a platform to showcase Kenya's diverse attractions, cultural richness, and adventure opportunities. This channel can serve as a 24/7 promotional tool, reaching a global audience.

03 Personalization

For contemporary travellers, personalized experiences are no longer considered a luxury but a prerequisite. 80% of consumers seek tailored experiences from retailers, and the tourism industry is no exception. From pre-booking to post-stay interactions, customers expect every interaction point to be in sync with their preferences and inspiring potential tourists.

04 Domestic Tourism Promotion:

It also recommended that to promote domestic tourism, the government through various channels can create engaging campaigns highlighting the beauty and uniqueness of local destinations. Develop special packages, discounts, or loyalty programs to incentivize domestic travel. A framework on collaborating with local influencers and celebrities should be developed. They are strong entities to endorse and share their travel experiences within the country, encouraging citizens to explore their own backyard.

05

Safety and Security Prioritization:

Strengthening security measures in tourist hotspots and popular destinations should be continuously implemented. This is to build trust among potential tourists and investors. There should be collaboration with law enforcement agencies to leverage technology for enhanced safety. Going forward the government should implement communication strategies emphasizing the country's commitment to ensuring a secure environment for visitors and investors.

06

Diversification of Tourism Products:

The country should introduce new tourism products such as culinary experiences, and wellness retreats to diversify the visitor experience. Identifying and promoting niche tourism products such as culture, adventure and sports are paramount for the sector to grow. This should be amplified through collaboration with local entrepreneurs and communities to develop and promote these offerings. Further there should be continuous highlighting of the unique attractions in marketing campaigns to attract a broader range of tourists interested in various aspects of culture, history, and lifestyle.

07

Strengthen International Conference Bidding

Given the capacity of the destination to host international meetings, the country should strengthen international conference bidding through KTB, KICC and other government agencies. For example, KICC alone has got capacity to host 45 meetings per year with an average of 1000 delegates per event. This shows that the destination has a very big potential for international conferences that has not been fully utilized.

08

Implement and Expand Quality Training in Tourism and Hospitality

Implementing quality hospitality training can significantly contribute to promoting the destination tourism by enhancing the overall visitor experience, ensuring the satisfaction of tourists, and building a positive reputation for the destination. Well-trained hospitality professionals can deliver high-quality services, creating a positive and memorable experience for tourists. Training programs can equip hospitality staff with the skills to offer personalized and tailored services based on the preferences and interests of tourists. This creates a customized experience that resonates with visitors and encourages them to explore more facets of the destination. Satisfied tourists are more likely to share their positive experiences with friends and family. The Exit Survey 2023 showed that 47.85% of tourists to Kenya were repeat visitors while 12.6% learnt about this destination through word-of-mouth recommendations. These are powerful marketing tools, and well-trained hospitality staff play a crucial role in creating experiences that guests want to share and experience again.

To design and deliver fit for purpose training programmes, a robust skill sets requirements and training needs analysis mechanism needs to be put into place.

It has been highlighted in this report that at the global level, there is a shortage of tourism and hospitality personnel. The country should therefore endeavour to expand training capacity targeting the export market as well especially considering the already acknowledged positive reputation of Kenyans in the field globally.



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Utalii House, 7th Floor,
Utalii Street, off Uhuru Highway.
P.O. Box 42131-00100, Nairobi, KENYA
Telephone: 0202001084
Email: info@tri.go.ke