



**MINISTRY OF TOURISM
AND WILDLIFE**



Annual Tourism Sector Performance Report 2024



**Correct Citation:**

Tourism Research Institute (2025). Annual Tourism Sector Performance Report 2024.

Copyright © 2025 Tourism Research Institute

Reproduction of this publication for educational or non-commercial purposes is authorised without written permission from the copyright holder, provided that the source is fully acknowledged. Reproduction of the publication for resale or other commercial purposes is however strictly prohibited, except with prior written permission from the copyright holder.

Photos: Unsplash, Freepik

Please consider the environment before printing this publication. If you have to print it, please use recycled paper, and print on both sides of the paper.

Foreword



Our vision is to elevate Kenya's tourism sector to new heights by capitalizing on emerging opportunities and addressing existing challenges.

The tourism sector stands as a cornerstone of Kenya's economic growth, cultural exchange, and sustainable development. As we unveil the Seventh Edition of the Annual Tourism Sector Performance Report, I take immense pride in the resilience, innovation, and strategic advancements that continue to shape our industry. This report provides a comprehensive review of the sector's performance, offering valuable insights into the achievements, challenges, and opportunities that defined the past year.

Kenya's tourism industry has demonstrated remarkable growth, driven by well-structured policies, targeted marketing initiatives, and the continuous enhancement of our tourism products. The integration of digital solutions, the expansion of air connectivity, and the diversification of experiences have positioned Kenya as a premier destination on the global stage. These efforts reflect the commitment of both the public and private sectors in fostering a dynamic and competitive tourism landscape.

In a rapidly evolving global tourism environment, sustainability remains at the heart of our agenda. The imperative to adopt green tourism practices, invest in carbon-neutral infrastructure, and embrace technological innovations will ensure that Kenya remains a leader in responsible tourism. The sector's robust performance in cruise tourism, Meetings, Incentives, Conferences, and Exhibitions (MICE), and hospitality underscores the need for continued investment in world-class facilities and seamless connectivity.

As we look ahead, our vision is to elevate Kenya's tourism sector to new heights by capitalizing on emerging opportunities and addressing existing challenges. Strengthening our presence in key international markets, enhancing service delivery, and promoting sustainable tourism practices will be pivotal to achieving this goal. I commend the Tourism Research Institute for its dedication to providing data-driven insights that inform policy and strategic decision-making.

With a clear roadmap and a shared commitment to excellence, I am confident that Kenya's tourism industry will continue to flourish, creating jobs, driving economic prosperity, and showcasing our rich heritage to the world.

Hon. Rebecca Miano, EGH

Cabinet Secretary

Ministry of Tourism and Wildlife

Preface



As the industry continues to evolve, sustainability, innovation, and resilience will define the next phase of growth.

The Annual Tourism Sector Performance Report is vital for assessing the progress, trends, and strategic direction of Kenya's tourism industry. Now in its Seventh Edition, this report offers a comprehensive analysis of the sector's performance, highlighting key achievements, emerging challenges, and forward-looking recommendations to sustain growth and competitiveness.

Tourism remains a pillar of Kenya's economy, significantly contributing to employment, foreign exchange earnings, and regional development. The past year has witnessed a resurgence in international arrivals, increased tourism revenues, and notable product diversification and digital transformation advancements. These gains underscore the effectiveness of strategic interventions such as enhanced air connectivity, the introduction of the Electronic Travel Authorization (ETA), and targeted marketing initiatives that have strengthened Kenya's position as a leading destination.

As the industry continues to evolve, sustainability, innovation, and resilience will define the next phase of growth. The growing demand for responsible travel necessitates greater investment in green certifications, carbon-neutral accommodations, and technology-driven solutions to enhance the visitor experience. Additionally, the rise in cruise tourism and the continued expansion of the Meetings, Incentives, Conferences, and Exhibitions (MICE) sector present significant opportunities that require strategic focus and infrastructure development.

This report provides key insights that will guide policy formulation, investment decisions, and industry collaborations. I extend my appreciation to the team in compiling this edition. It is my hope that stakeholders across the sector—both public and private—will leverage the findings to drive sustainable growth and position Kenya as a global leader in tourism.

Hon. John Ololtuaa, CBS

Principal Secretary

State Department for Tourism

Acknowledgment



The expertise and institutional support from these key stakeholders have enhanced the quality of tourism statistics, enabling evidence-based decision-making and policy formulation.

Tourism Research Institute (TRI), extends sincere appreciation to the Kenya National Bureau of Statistics (KNBS), Kenya Tourism Board (KTB), the State Department for Tourism (SDT), the Central Bank of Kenya (CBK), and the Directorate of Immigration Services (DIS) for their invaluable contributions to the production of this 2024 Tourism Performance Report. Their collaborative efforts in data collection, verification, analysis, and dissemination have played a pivotal role in ensuring the report provides accurate and insightful information on the performance of Kenya's tourism sector. The expertise and institutional support from these key stakeholders have enhanced the quality of tourism statistics, enabling evidence-based decision-making and policy formulation. This joint effort underscores the importance of multi-agency partnerships in fostering a data-driven approach to tourism development and sustainability. We appreciate their dedication and commitment to advancing Kenya's tourism sector through credible and timely reporting.

David Gitonga

AG. Chief Executive Officer

Tourism Research Institute

Contents

| | |
|---|-----------|
| Foreword | ii |
| Preface | iii |
| Acknowledgment | iv |
| Executive Summary | ix |
| 1 Introduction | 1 |
| 1.1. Purpose of the Performance Report | 2 |
| 1.2. Global Outlook of Tourism Performance in 2024 | 2 |
| 1.3. Global Tourism Performance Forecast | 3 |
| 1.4. African Regional Tourism Performance 2024 | 4 |
| 1.5. Kenya Tourism Sector Performance Overview 2024 | 5 |
| 2 Inbound Tourist Numbers | 7 |
| 2.1. Visitor Arrivals | 8 |
| 2.2. Monthly Inbound Arrivals, 2020–2024 | 8 |
| 3 Market Performance | 11 |
| 3.1. Source Markets | 12 |
| 3.2. Arrival Share by Region | 12 |
| 3.3. Top 30 Most Improved Source Markets | 14 |
| 3.4. Purposes of Visit | 15 |
| 3.5. Arrivals by Point of Entry | 16 |
| 3.6. Arrivals through other Points of Entry | 17 |
| 3.7. Arrivals by Point of Entry and Purpose of Visit | 18 |
| 3.8. Top 30 source markets by entry points, 2024 | 19 |
| 3.9. Arrival Share by Purpose of Visit and Region | 22 |
| 3.10. Top Source Markets by Region | 23 |
| 3.11. Main Purpose of Visit by Top Source Markets | 24 |
| 3.12. East African Community (EAC) Arrivals by Purpose of Visit | 26 |
| 3.13. EAC Arrivals by Point of Entry | 27 |
| 3.14. Cruise Tourism performance | 28 |

| | | |
|-----------|---|-----------|
| 4 | Inbound Tourism Earnings | 29 |
| 5 | Accommodation | 31 |
| 5.1. | Bed Capacity | 32 |
| 5.2. | Bed Occupancy | 33 |
| 5.3. | International Bed Occupancy | 33 |
| 5.4. | Domestic Bed Occupancy | 34 |
| 5.5. | Room Occupancy | 34 |
| 6 | Meetings, Incentives, Conventions And Exhibitions | 35 |
| 6.1. | Number of International and local Delegates | 36 |
| 6.2. | International Conferences | 37 |
| 6.3. | Local Conferences | 38 |
| 7 | Tourism Contribution To Employment | 39 |
| 8 | Initiatives Supporting Sector Performance In 2024 | 41 |
| 9 | Tourism Projections And Trends | 43 |
| 9.1. | Projections | 44 |
| 9.2. | Global Tourism Outlook in 2025 | 44 |
| 9.3. | Kenya's Tourism | 45 |
| 10 | Conclusion And Recommendations | 47 |
| 10.1. | Conclusion | 48 |
| 10.2. | Recommendations | 48 |
| 11 | Annex | 49 |
| 11.1. | Annex One: Forecast for Visitors Arrivals and Inbound Earnings from 2025–2028 | 50 |

List of Figures

| | | |
|------------|---|----|
| Figure 1: | Global Percentage Change Over 2019 | 3 |
| Figure 2: | International Arrivals, 2020–2024 | 8 |
| Figure 3: | Monthly Tourist Arrivals, 2020–2024 | 9 |
| Figure 4: | Top 30 Source Markets 2024 | 12 |
| Figure 5: | Arrival Share by Region, 2024 | 13 |
| Figure 6: | Arrival by Purpose of Visit, 2024 | 15 |
| Figure 7: | Other Points of Entry, 2024 | 17 |
| Figure 8: | Arrival Share by Purpose of Visit and Region, 2024 | 22 |
| Figure 9: | Top Source Market by Region, 2024 | 23 |
| Figure 10: | East African Community (EAC) Arrivals by Purpose of Visit, 2024 | 27 |
| Figure 11: | EAC Arrivals by Point of Entry, 2024 | 27 |
| Figure 12: | Cruise Tourism Performance, 2022 – 2024 | 28 |
| Figure 13: | Inbound Tourism Earnings, 2019 – 2024 | 30 |
| Figure 14: | Bed Occupancy, 2020 – 2024 | 33 |
| Figure 15: | International Bed Occupancy, 2020 – 2024 | 33 |
| Figure 16: | Domestic Bed Occupancy, 2020 – 2024 | 34 |
| Figure 17: | Room Occupancy, 2020 – 2024 | 34 |
| Figure 18: | Number of International Delegates, 2020 – 2024 | 36 |
| Figure 19: | Number of Local Delegates, 2020 – 2024 | 37 |
| Figure 20: | Number of international conferences, 2020 – 2024 | 37 |
| Figure 21: | Number of Local Conferences, 2020 – 2024 | 38 |
| Figure 22: | Wage Employment by Industry and Sector, 2019– 2023 ('000) | 40 |

List of Tables

| | | |
|----------|---|----|
| Table 1: | Top 30 Most Improved Source Markets, 2023 – 2024 | 14 |
| Table 2: | Arrivals by Point of Entry, 2020 – 2024 | 16 |
| Table 3: | Arrivals by Point of Entry, 2020 – 2024 cont' | 16 |
| Table 4: | Arrivals by Point of Entry and Purpose of Visit, 2024 | 18 |
| Table 5: | Top 30 source markets by entry points, 2024 | 20 |
| Table 6: | Main Purpose of Visit by Top Source Markets, 2024 | 24 |
| Table 7: | East African Community (EAC) Arrivals by Purpose of Visit, 2024 | 26 |
| Table 8: | Bed Capacity per County | 32 |
| Table 9: | Projections Based on Average Limit | 44 |

Acronyms and Abbreviations

| | | | |
|-------|--|------|---|
| COVID | Coronavirus Disease | USA | United States of America |
| JKIA | Jomo Kenyatta International Airport | VFR | Visiting Friends and Relatives |
| KICC | Kenya International Convention Centre | SDT | The State Department for Tourism |
| KNBS | Kenya National Bureau of Statistics | CBK | Central Bank of Kenya |
| KTB | Kenya Tourism Board | DIS | The Directorate of Immigration Services |
| KWS | Kenya Wildlife Service | AFDB | African Development Bank Group |
| MICE | Meeting, Incentives, Convention & Exhibition | IDA | International Development Association |
| MIA | Moi International Airport, Mombasa | EAC | East African Community |
| TRI | Tourism Research Institute | | |
| UK | United Kingdom | | |

Executive Summary

Tourism Research Institute (TRI) is glad to present the Seventh Edition of its Annual Tourism Sector Performance Report. The Tourism Performance Report 2024 presents a comprehensive analysis of the sector's trajectory, highlighting key trends, achievements, and challenges that shaped the industry over the year.

An estimated 1.4 billion international tourists (overnight visitors) were recorded around the world in 2024, an increase of 11% over 2023, or 140 million more. In the same year, the African continent welcomed 74 million visitors, marking a 7% increase compared to 2019 and a 12% rise from 2023, according to United Nations Tourism. By market share, this accounts for 5.3% of global arrivals.

In 2024, Kenya experienced a notable increase in international tourist arrivals, welcoming 2,394,376 visitors compared to 2,089,259 in 2023. This represents a growth of 14.6%. The inbound tourism earnings increased to Kshs. 452.20 billion in the year 2024 compared to Kshs. 377.49 billion in 2023 translating to a growth of 19.79%. The significant improvement in tourist arrivals can be largely attributed to key strategic interventions, including Electronic Travel Authorization (ETA), aggressive marketing, enhanced tourism product diversification, and adoption of digital platforms such as smart booking platforms and targeted online promotions, which have optimized the visitor experience. Additionally, there was an introduction of new scheduled airlines namely Air Asia, Air Dubai and relaunch of Brussels Airlines.

The United States led as the largest source market, accounting for 12.8% of total arrivals, followed by Uganda (9.42%) and Tanzania (8.49%). In terms of source market increase, Tanzania was first with an increase of 42,133 from 161,157 in 2023 to 203,290 in 2024. The second most improved source market was China with an increase of 29,085, from 61,377 in 2023 to 90,462 in 2024. Notably, the United States of America came in third with an increase of 28,342 from 278,159 in 2023 to 306,501 in 2024. Other high-growth markets include Somalia (27,029), Italy, (19,926) and Uganda, (19,755).

Jomo Kenyatta International Airport (JKIA) remains the major entry point for Kenya's inbound tourists recording 1,622,745 in the year 2024 which accounted for 67.8% of the total arrivals while Moi International Airport recorded 204,538 accounting for 8.5%.

For the East African Community business and conference travel accounted for the largest share in most countries, with Uganda 46.7%, Tanzania 46.6%, and Rwanda 46.9% showing a particularly strong presence in this category. Visiting Friends and Relatives (VFR) was the second most common travel purpose, notably high in Burundi 48.6% and South Sudan 53.1%. Holiday and leisure travel vary significantly, with South Sudan 16.3% and the Democratic Republic of Congo (DRC) 14.7% showing relatively higher proportions compared to Burundi 8.3% and Rwanda 10.1%. Transit travel is highest in the DRC 14.0% and lowest in South Sudan 2.4%.

Cruise tourism showed an exemplary performance with the destination receiving 6,561 tourists in 2024 up from 2,490 in 2023 representing an increase of 163.5%. The bed-nights occupancy is estimated to have risen by 16% from 8,632,803 in 2023 to 9,992,721 in 2024. The occupancy by international visitors is estimated to have increased from 4,014,707 in 2023 to 4,818,755 in 2024, indicating a growth of 20%. Domestic bed occupancy is estimated to have grown by 12% from 4,618,094 in 2023 to 5,173,966 in 2024. Similarly, the room occupancy is estimated to have increased by 19% from 6,417,531 in 2023 to 7,609,856 in 2024. This substantial growth indicates expansion in the hospitality sector. Meetings Incentives Conferences and Exhibitions (MICE) accounted for 27% of the total tourism arrivals during the period under review. This is a 12.5% increase compared to previous year that accounted for 24% of the total tourist arrivals. In 2024 MICE recorded 37,405 international delegates in the year 2024 compared to 34,814 the previous year translating to a growth of 7.4%. The number of international delegates increased in the months of May and September 2024, attributed to high profile events such as annual meeting for the AFDB Group Board of Directors, IDA for Africa Heads of State Summit, Extra Requirement for Africa Fertilizer among others. On the other hand, MICE recorded 699,469 number of Local delegates in the year 2024 compared to 676,910 in the previous year translating to growth of 3.3%.

It is projected that Kenya will receive 3 million tourists with matching inbound earnings of KES 560 billion in 2025. At the same time, the tourism sector is expected to undergo significant transformation, driven by key trends in sustainability, wellness, technology, and solo travel.

It therefore recommended that marketing strategies, particularly targeting countries like the United States, China, Poland, Germany, and India which have demonstrated significant growth and high potential be strengthened. Secondly, businesses in the tourism sector should be encouraged to adopt green certifications, carbon-neutral accommodations, and digital solutions. This would cater

to the global demand for environmentally conscious travel and support long-term sustainability. The cruise tourism sub-sector saw an impressive 163.5% growth in 2024. The success calls for further investment in expanding cruise infrastructure. Developing world-class conference facilities, improving connectivity, and creating tailored event packages. The growth of MICE also calls for attracting more high-profile

meetings and conferences by investing in ultra-modern conference facilities. Embracing technological innovations will be key to keeping Kenya competitive in the evolving tourism landscape by investing in Artificial Intelligence (AI)-driven services, smart energy management, and digital wayfinding to enhance visitor experiences in the destination.



1

Introduction

The Tourism Sector Performance Report 2024 presents a comprehensive analysis of the sector's trajectory, highlighting key trends, achievements, and challenges that shaped the industry over the year. Against evolving global travel patterns, economic shifts, and sustainability imperatives, the report evaluates the sector's resilience, recovery, and growth within national and international contexts.

Building on insights from previous years, this report provides an in-depth assessment of visitor arrivals, tourism receipts,

source market performances, and industry contributions to employment. As global tourism continues to adapt to post-pandemic realities, climate concerns, and technological advancements, the 2024 performance review offers valuable perspectives for policymakers, industry stakeholders, and investors. This report serves as a strategic tool to inform decision-making, enhance competitiveness, and drive sustainable tourism development in alignment with long-term national and global goals.

1.1. Purpose of the Performance Report

The purpose of this Tourism Sector Performance Report for 2024 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.

Analyse 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 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. 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 prospects.

1.2. Global Outlook of Tourism Performance in 2024

An estimated 1.4 billion international tourists (overnight visitors) were recorded around the world in 2024, an increase of 11% over 2023, or 140 million more. Results were driven by strong post-pandemic demand, robust performance from large global source markets, and the ongoing recovery of destinations in Asia and the Pacific. The Middle East remained the strongest-performing region compared to 2019, with international arrivals in 2024 climbing 32% above pre-pandemic levels, though 1% compared to 2023.

Europe welcomed 1% more arrivals than in 2019 and 5% over 2023. Africa saw a 7% increase in arrivals compared to 2019 and 12% more than in 2023. The Americas recovered 97% of its pre-pandemic arrivals. Asia and the Pacific recovered 87% of its pre-pandemic arrivals. By subregions, North Africa (+22%) and Central America (+17%) saw the strongest performance in 2024 over 2019. Figure 1 shows the percentage change over 2019 figures.

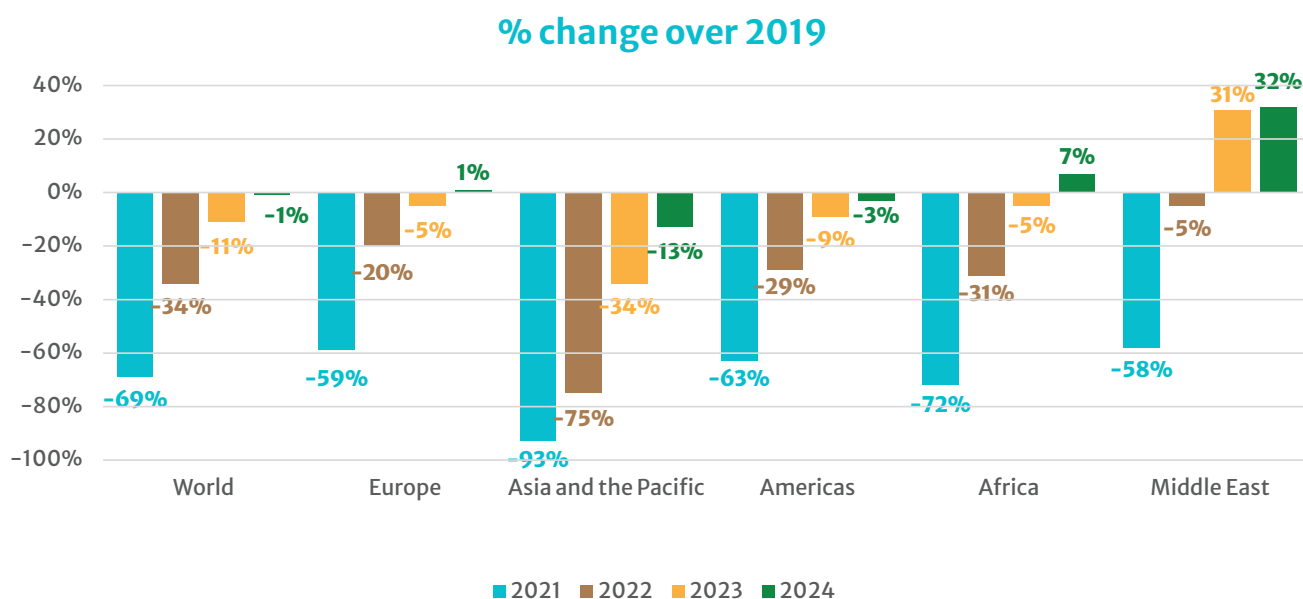


Figure 1: Global Percentage Change Over 2019

Source: UN Tourism

1.3. Global Tourism Performance Forecast

Preliminary projections suggest that international tourist arrivals will increase by 3% to 5% in 2025 compared to 2024. This optimistic forecast is supported by the latest UN Tourism Confidence Index, which scores 130 for 2025 on a scale of 0 to 200, with 100 indicating comparable performance. Furthermore, approximately 64% of experts

on the UN Tourism Panel express a positive or significantly improved outlook for 2025 compared to the previous year. However, persistent economic and geopolitical challenges remain critical threats to maintaining high confidence levels in the sector.

1.4. African Regional Tourism Performance 2024

For the first time since the COVID-19 pandemic, Africa has exceeded its pre-pandemic levels of international tourist arrivals. In 2024, the continent welcomed 74 million visitors, marking a 7% increase compared to 2019 and a 12% rise from 2023, according to United Nations Tourism. By market share, this accounts for 5.3% of global arrivals.

North Africa played a key role in driving this recovery, with international arrivals surging 22% above 2019 levels. This exceptional performance positioned Africa as the world's second-fastest recovering region in 2024, trailing only the Middle East, which recorded a 32% increase in arrivals compared to pre-pandemic levels.

74 million

International tourists in 2024, surpassing pre-pandemic levels.

12%

Rise in arrivals from 2023.

22%

Increase in North Africa's arrivals above 2019 levels.

7%

Increase in arrivals compared to 2019.

5.3%

Africa's share of global tourist arrivals.

32%

Growth in Middle East's arrivals, making Africa the second-fastest recovering region.



1.5. Kenya Tourism Sector Performance Overview 2024

This annual tourism performance release provides information on tourists who visited the country in 2024. In the year under review, Kenya's tourism sector continued to build on the resilient performance demonstrated in 2023, making remarkable strides towards sustained recovery and growth. This report provides a comprehensive overview of the country's tourism landscape, with a focus on key metrics such as inbound tourism earnings, bed capacity, bed nights, and room occupancies. Amid ongoing global uncertainties, Kenya's unwavering commitment to revitalizing its tourism industry is reflected in the strategic initiatives implemented and the positive outcomes achieved.

By evaluating the sector's performance, this analysis offers valuable insights to stakeholders, policymakers, and industry enthusiasts, showcasing the trends and developments shaping Kenya's tourism landscape in 2024. Key areas covered in this report include;

1. Inbound tourist arrivals,
2. Source Markets Performance
3. Tourism Earnings
4. Accommodation
5. MICE (Meetings, Incentives, Conferences, and Exhibitions) performance for local and international events, tourism training progress,
6. Visitation to national parks, museums, and heritage sites
7. Projections 2025–2028







2

Inbound Tourist Numbers

2.1. Visitor Arrivals

In 2024, Kenya experienced a notable increase in international tourist arrivals, recording 2,394,376 visitors compared to 2,089,259 in 2023. Tourist arrivals have shown a strong and consistent upward trajectory from 2020 to 2024, reflecting a robust recovery and growth in the sector. In 2020, arrivals were at 567,848, impacted by the global disruptions caused by the COVID-19 pandemic. However, 2021 saw a significant rebound to 870,465, marking a nearly 53% increase as travel restrictions eased and confidence in tourism improved. The growth accelerated in 2022, with arrivals reaching

1,483,752, a 70% rise from the previous year, signalling a strong resurgence in demand. By 2023, arrivals had further surged to 2,089,259, representing a 41% increase, indicating sustained growth momentum. In 2024, the upward trend continued with 2,394,376 arrivals, reflecting a 14.6% increase from the previous year, reinforcing the sector's full recovery and expansion beyond pre-pandemic levels. This steady growth highlights the resilience of the tourism sector and effectiveness of strategies aimed at revitalizing the sector. Figure 2 shows International Arrivals from 2020–2024.

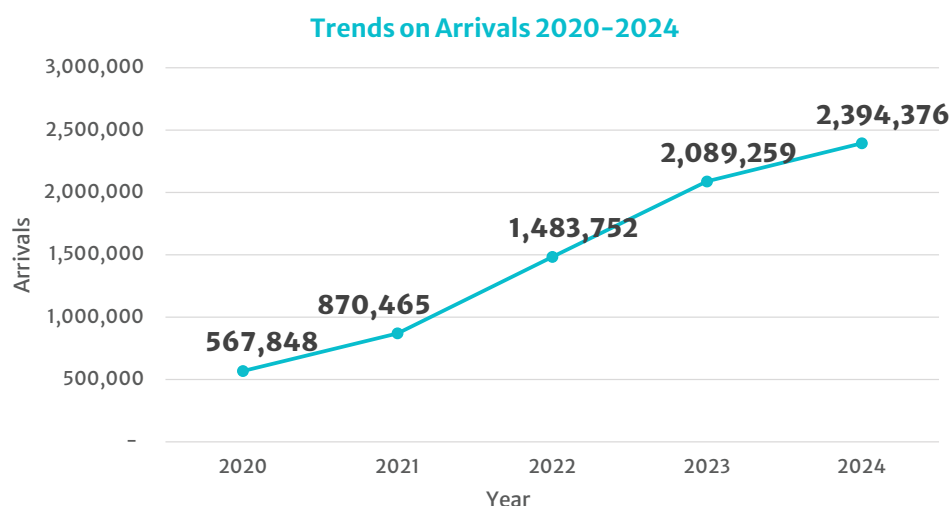


Figure 2: International Arrivals, 2020–2024

Source: Directorate of Immigration Services

2.2. Monthly Inbound Arrivals, 2020–2024

Figure 3 shows the monthly tourist arrivals between 2020 and 2024 exhibit a clear pattern of recovery, and growth, reflecting the sector's resilience and adaptive capacity. In 2020, the impact of the COVID-19 pandemic is evident, with a sharp decline after March. Arrivals plummeted from 170,803 in January to nearly zero in April and May, with only a gradual recovery in the latter half of the year, totalling 567,848.

The year 2021 marked the beginning of a rebound, albeit at a slower pace. Monthly arrivals ranged between 40,000 and 113,000, showing a steady increase as international travel restrictions eased and confidence improved. Peak arrivals were observed in December (113,111), culminating in an annual total of 870,465.

By 2022, the industry experienced accelerated growth, with arrivals consistently exceeding 90,000 per month. The peak months of July (149,411) and December (160,556) reflected a return of seasonal travel patterns. This momentum resulted in a total of 1,483,752, indicating a steady recovery.

The year 2023 saw further expansion, with numbers surpassing 200,000 in peak months (July and August), demonstrating robust demand. The annual total of 2,089,259 reflected over pre-pandemic levels, with each month showing significant improvement compared to the previous year.

By 2024, tourism fully rebounded and entered an expansion phase. Monthly arrivals exceeded 200,000 in multiple months, peaking in August (249,086). The annual total reached 2,394,376, showing sustained growth and seasonality stabilization.

Monthly Inbound Arrivals, 2020-2024

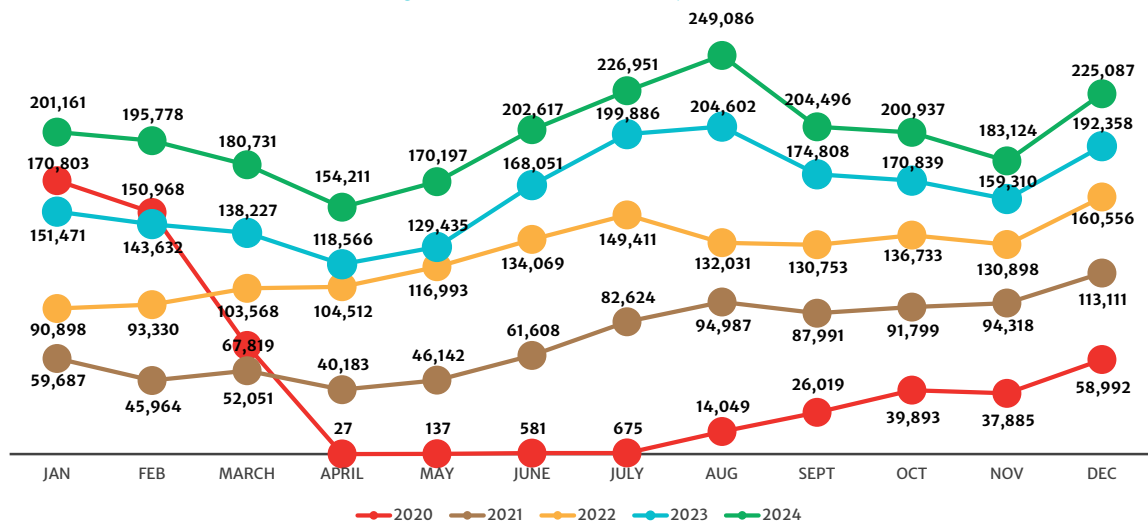


Figure 3: Monthly Tourist Arrivals, 2020-2024

Source: Directorate of Immigration Services





3

Market Performance

3.1. Source Markets

The United States of America continued to be the lead source market accounting for 12.8% of the total arrivals. The United States of America (USA), recorded an increase of 28,342 from 278,159 in 2023 to 306,501 in 2024. Uganda came in second with 225,559 arrivals accounting for 9.4% of total arrivals, followed by Tanzania which accounted for 8.4% of

the total arrivals. It was worth noting that major key source markets have all recorded an increase in arrivals, which can be attributed to aggressive marketing campaigns, improved accessibility to the destination, improved infrastructure, good governance of the sector and adoption of technology in improving personalized tourist services.

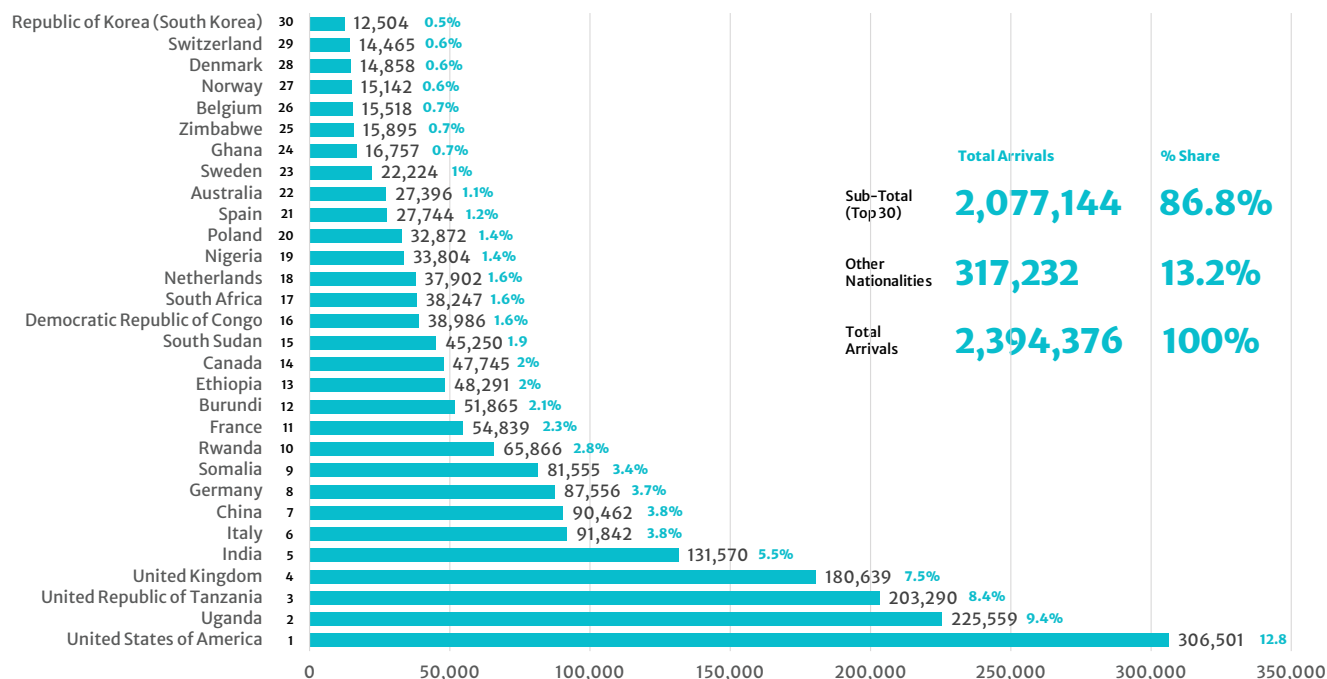


Figure 4: Top 30 Source Markets 2024

Source: Directorate of Immigration Services

3.2. Arrival Share by Region

Tourist arrivals were dominated by Africa, which recorded 975,883 arrivals, accounting for 40.8% of the total. Europe followed with 680,373 arrivals, representing 28.1% of the total. Americas recorded 376,019 arrivals, making up 15.7% of the total. Asia contributed 284,277 arrivals, equating to 12.1% of the total. Oceania had a significantly lower share with 31,615 arrivals or 1.3%. The Middle East saw 19,559 arrivals, representing just 0.80% of the total and the category labelled as Others accounted for 26,650 arrivals, translating to 1.1% of the total. This distribution highlights Africa's strong position in tourist arrivals, followed by Europe and the Americas, while Asia had a moderate share. In contrast,

Oceania and the Middle East regions contributed minimally to the total, emphasizing regional disparities in tourism flows. The most improved region was Asia which recorded an increase of 19.2% compared to 2023 where arrivals were 238,558. The African region followed at 17.9% where arrivals were 827,501 in 2023, Oceania recorded an increase of 13% in 2024 from 27,972 in 2023. Europe recorded a significant increase of 12.6% compared to 2023 where arrivals were 604,261. The Americas recorded an increase of 10.4% compared to 2023 arrivals of 340,374. Figure 5 shows arrival share by region, 2024.

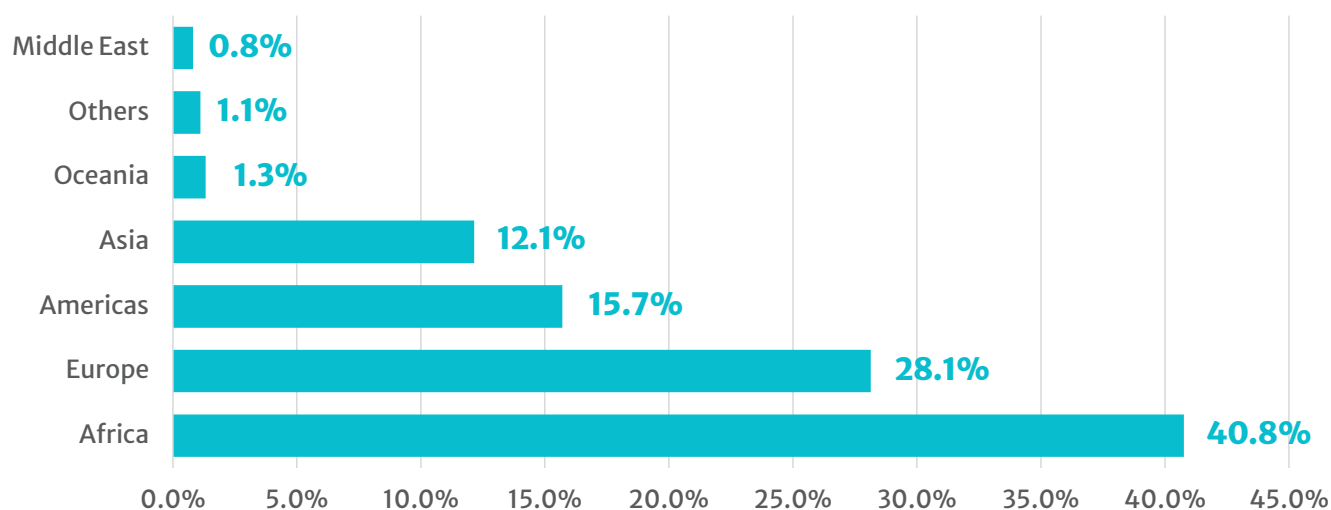


Figure 5: Arrival Share by Region, 2024

Source: Directorate of Immigration Services



3.3. Top 30 Most Improved Source Markets

Table 1 shows top 30 most improved source markets, 2023 vis-à-vis 2024. The most remarkable increase is observed in Czech Republic which registered an increase of 121.9% arrivals from 4,727 in 2023 to 10,490 in 2024. The second most improved was Burundi with an increase of 57.1% arrivals from 33,007 in 2023 to 51,865 in 2024. Notably,

Sudan came in third with an increase of 52.6% arrivals from 7,185 in 2023 to 10,961 in 2024. Other high-growth markets include Poland (+52.3%), Somalia (+49.6%), China (+47.4%), Democratic Republic of Congo (+38.3%), Republic of Korea (South Korea) (+34.4%), Italy (+27.7%) and United Republic of Tanzania (+26.1%).

Table 1: Top 30 Most Improved Source Markets, 2023 – 2024

| S/No | Country | 2023 | 2024 | % Growth |
|------|---------------------------------|---------|---------|----------|
| 1 | Czech Republic | 4,727 | 10,490 | 121.9 |
| 2 | Burundi | 33,007 | 51,865 | 57.1 |
| 3 | Sudan | 7,185 | 10,961 | 52.6 |
| 4 | Poland | 21,579 | 32,872 | 52.3 |
| 5 | Somalia | 54,526 | 81,555 | 49.6 |
| 6 | China | 61,377 | 90,462 | 47.4 |
| 7 | Democratic Republic of Congo | 28,198 | 38,986 | 38.3 |
| 8 | Republic of Korea (South Korea) | 9,305 | 12,504 | 34.4 |
| 9 | Italy | 71,916 | 91,842 | 27.7 |
| 10 | United Republic of Tanzania | 161,157 | 203,290 | 26.1 |
| 11 | Rwanda | 53,630 | 65,866 | 22.8 |
| 12 | Eritrea | 5,784 | 7,096 | 22.7 |
| 13 | Brazil | 3,452 | 4,145 | 20.1 |
| 14 | Portugal | 5,028 | 5,888 | 17.1 |
| 15 | Japan | 10,503 | 12,267 | 16.8 |
| 16 | Cameroon | 6,694 | 7,757 | 15.9 |
| 17 | Australia | 23,776 | 27,396 | 15.2 |
| 18 | Canada | 41,690 | 47,745 | 14.5 |
| 19 | Denmark | 13,270 | 14,858 | 12.0 |
| 20 | Turkey | 5,993 | 6,617 | 10.4 |
| 21 | Belgium | 14,068 | 15,518 | 10.3 |
| 22 | United States of America | 278,159 | 306,501 | 10.2 |
| 23 | Ireland | 8,422 | 9,259 | 9.9 |
| 24 | Malawi | 8,538 | 9,369 | 9.7 |
| 25 | Uganda | 205,804 | 225,559 | 9.6 |
| 26 | Pakistan | 10,346 | 11,336 | 9.6 |
| 27 | Ghana | 15,379 | 16,757 | 9.0 |
| 28 | Sri Lanka | 3,740 | 4,075 | 9.0 |
| 29 | India | 121,437 | 131,570 | 8.3 |
| 30 | Sweden | 20,600 | 22,224 | 7.9 |

Source: Directorate of Immigration Services

3.4. Purposes of Visit

Holiday/Leisure topped the purpose of visit at 44.2% representing the largest share of visitors. This significant percentage highlights the importance of leisure as a key driver of international travel. This underscores Kenya's strong positioning as a leading tourism destination, particularly for safari and beach. This was followed by those who came on Business/Conference at 26.9%, additionally those visiting friends and relatives had a share of 22.0%, indicating the

importance of the Kenyan diaspora and regional travel. It was noted that visitors on transit came fourth with 4.2%. Other segments, such as Education (1%), Religion (1%), Medical (0.4%), Employment (0.4%), and Sports (0.3%), contribute smaller shares, reflecting niche tourism activities that may have untapped growth potential. Figure 6 shows arrival by Purpose of Visit, 2024.

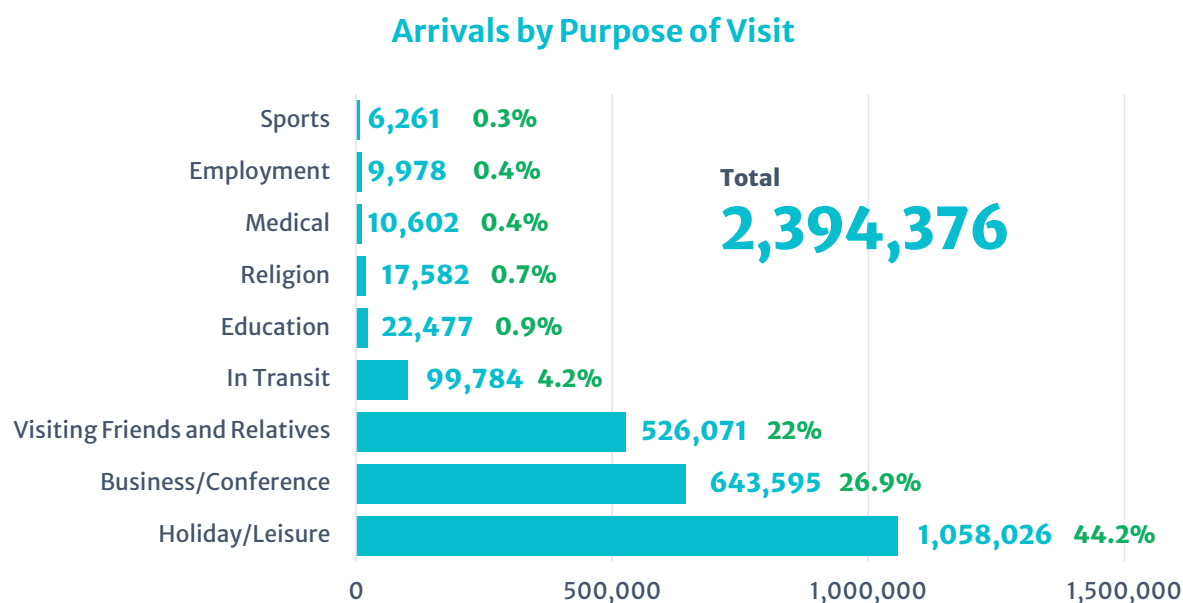


Figure 6: Arrival by Purpose of Visit, 2024

Source: Directorate of Immigration Services

3.5. Arrivals by Point of Entry

In 2024, the total number of arrivals across various points of entry showed a significant variation, with Jomo Kenyatta International Airport (JKIA) maintaining its position as the busiest entry point. JKIA recorded a remarkable 1,622,745 arrivals, representing 68% of the total arrivals, making it the primary gateway for international travellers. (MIA) followed at a distant second, receiving 204,538 arrivals. This number, while considerably lower than JKIA, highlights MIA's role as

a crucial entry point, particularly for leisure and business travellers heading to Kenya's coastal region.

Other entry points, including land borders and smaller airports, accounted for 567,093 arrivals collectively. This category, though not as dominant as JKIA, plays an essential role in regional travel, cross-border movement, and domestic connectivity.

Table 2: Arrivals by Point of Entry, 2020 – 2024

| Month | Point of Entry | | | | | | | | | |
|--------------|----------------|----------------|------------------|------------------|------------------|---------------|---------------|---------------|----------------|----------------|
| | JKIA | | | | | MIA | | | | |
| | 2020 | 2021 | 2022 | 2023 | 2024 | 2020 | 2021 | 2022 | 2023 | 2024 |
| Jan | 113,078 | 43,234 | 63,277 | 113,222 | 126,074 | 12,205 | 3,045 | 6,655 | 16,343 | 24,948 |
| Feb | 106,345 | 32,047 | 67,560 | 108,204 | 132,297 | 11,086 | 3,005 | 6,390 | 15,022 | 23,657 |
| March | 43,346 | 37,214 | 76,336 | 104,909 | 120,536 | 3,950 | 3,194 | 5,073 | 14,219 | 18,014 |
| April | 8 | 27,850 | 77,379 | 92,624 | 108,865 | – | 3,037 | 3,949 | 7,501 | 6,723 |
| May | 93 | 32,153 | 87,058 | 101,166 | 121,903 | – | 1,735 | 3,429 | 5,691 | 5,984 |
| June | 440 | 46,494 | 103,332 | 133,596 | 149,964 | 2 | 2,038 | 4,834 | 8,009 | 9,680 |
| July | 467 | 64,498 | 109,766 | 155,944 | 164,862 | 1 | 4,532 | 6,423 | 12,540 | 16,166 |
| August | 13,371 | 72,291 | 97,103 | 155,524 | 161,908 | 548 | 6,257 | 7,555 | 16,636 | 20,047 |
| September | 16,565 | 66,667 | 90,502 | 133,524 | 139,986 | 662 | 3,633 | 6,282 | 12,208 | 15,748 |
| October | 27,932 | 67,608 | 96,168 | 128,504 | 135,606 | 1,179 | 5,201 | 8,525 | 13,775 | 17,827 |
| November | 27,311 | 71,271 | 88,342 | 118,506 | 119,751 | 1,040 | 5,435 | 10,878 | 15,108 | 19,777 |
| December | 43,362 | 82,867 | 105,939 | 134,311 | 140,993 | 3,113 | 7,637 | 14,867 | 19,987 | 25,967 |
| Total | 392,318 | 644,194 | 1,062,762 | 1,480,034 | 1,622,745 | 33,786 | 48,749 | 84,860 | 157,039 | 204,538 |

Table 3: Arrivals by Point of Entry, 2020 – 2024 cont'

| Month | Point of Entry | | | | | | | | | |
|-----------|----------------|--------|--------|--------|--------|---------|--------|---------|---------|---------|
| | OTHERS | | | | | TOTAL | | | | |
| | 2020 | 2021 | 2022 | 2023 | 2024 | 2020 | 2021 | 2022 | 2023 | 2024 |
| Jan | 45,520 | 13,408 | 20,966 | 38,248 | 50,139 | 170,803 | 59,687 | 90,898 | 167,813 | 201,161 |
| Feb | 33,537 | 10,912 | 19,380 | 29,780 | 39,824 | 150,968 | 45,964 | 93,330 | 153,006 | 195,778 |
| March | 20,523 | 11,643 | 22,159 | 29,256 | 42,181 | 67,819 | 52,051 | 103,568 | 148,384 | 180,731 |
| April | 19 | 9,296 | 23,184 | 30,434 | 38,623 | 27 | 40,183 | 104,512 | 130,559 | 154,211 |
| May | 44 | 12,254 | 26,506 | 33,697 | 42,310 | 137 | 46,142 | 116,993 | 140,554 | 170,197 |
| June | 139 | 13,076 | 25,903 | 36,463 | 42,973 | 581 | 61,608 | 134,069 | 178,068 | 202,617 |
| July | 207 | 13,594 | 33,222 | 42,251 | 45,923 | 675 | 82,624 | 149,411 | 210,735 | 226,951 |
| August | 130 | 16,439 | 27,373 | 47,188 | 67,131 | 14,049 | 94,987 | 132,031 | 219,348 | 249,086 |
| September | 8,792 | 17,691 | 33,969 | 40,040 | 48,762 | 26,019 | 87,991 | 130,753 | 185,772 | 204,496 |

| Month | Point of Entry | | | | | | | | | |
|--------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|------------------|------------------|------------------|
| | OTHERS | | | | | TOTAL | | | | |
| | 2020 | 2021 | 2022 | 2023 | 2024 | 2020 | 2021 | 2022 | 2023 | 2024 |
| October | 10,782 | 18,990 | 32,040 | 39,570 | 47,504 | 39,893 | 91,799 | 136,733 | 181,849 | 200,937 |
| November | 9,534 | 17,612 | 31,678 | 36,129 | 43,596 | 37,885 | 94,318 | 130,898 | 169,743 | 183,124 |
| December | 12,473 | 22,607 | 39,750 | 49,130 | 58,127 | 58,948 | 113,111 | 160,556 | 203,428 | 225,087 |
| Total | 141,700 | 177,522 | 336,130 | 452,186 | 567,093 | 567,804 | 870,465 | 1,483,752 | 2,089,259 | 2,394,376 |

Source: Directorate of Immigration Services

3.6. Arrivals through other Points of Entry

The highest number of arrivals in the other entry points is recorded at Busia, with 180,279 individuals arriving, accounting for 7.5% of total arrivals, following Busia, Namanga had 138,436 arrivals, representing 5.8% of the total arrivals. Malaba sees significantly fewer arrivals at 52,088, which

is about 2.2%. followed by Lunganga, Taveta, Lwakhakha. Garissa/Tana Bridge: 1,753 (0.1%), Kisumu Airport: 1,630 (0.1%) Shimoni Seaport: 1,470 (0.1%) and others recorded very low numbers.

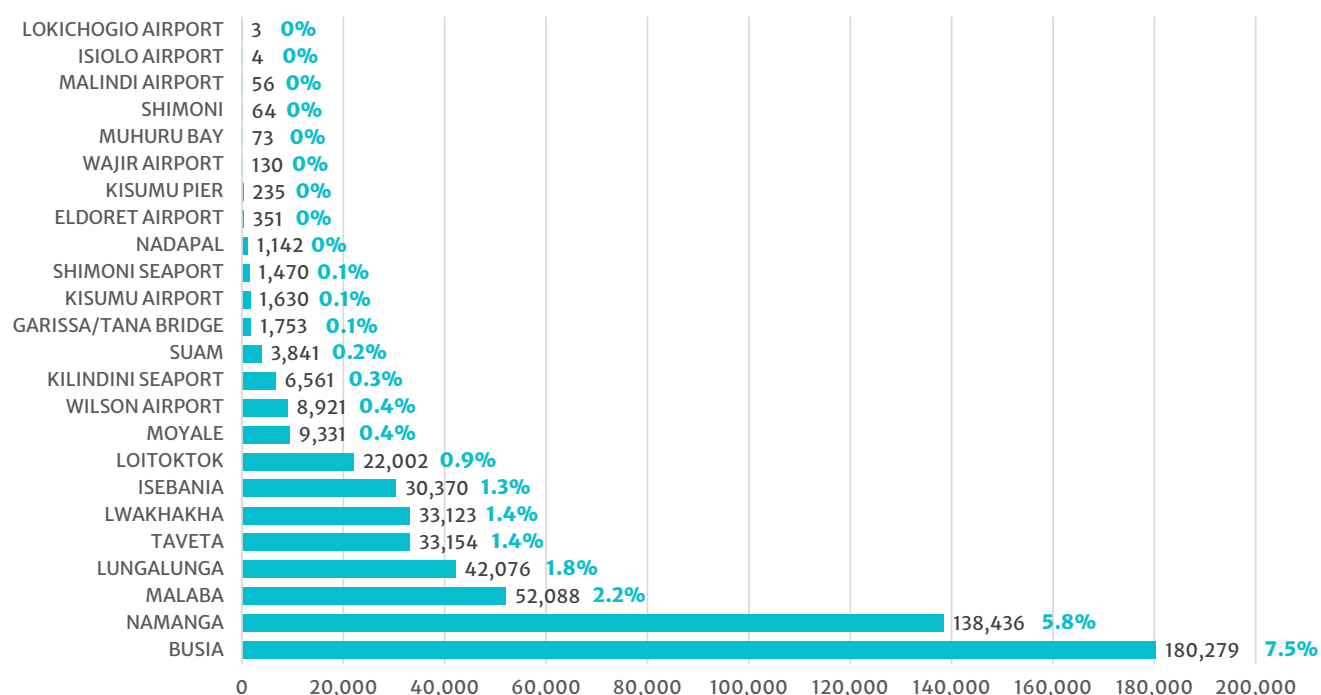


Figure 7: Other Points of Entry, 2024

Note: Excludes JKIA and MIA

Source: Directorate of Immigration Services

3.7. Arrivals by Point of Entry and Purpose of Visit

JKIA and MIA have the highest actual traffic, with JKIA seeing a significant share of holiday travellers (48.7%) and business (24.2%), while MIA is overwhelmingly dominated by holiday/leisure visitors (89.8%). Business travel is notably high at Wajir Airport (98.5%), Loitoktok (63.9%), and Malaba (61.0%). Holiday travel peaks at Kilindini Seaport (100%), Kisumu Airport (96.1%), and MIA. Family visits are common at border points like Moyale (86.2%), Muhuru Bay (86.3%),

and Garissa/Tana Bridge (88.4%), while transit travellers make up a large proportion at Moyale (86.2%) and Nadapal (84.5%). Overall, JKIA and MIA dominate in absolute numbers, but travel patterns vary by entry point, with business/conferencing concentrated in airports, holidays/leisure in coastal areas, and VFR at border crossings. Measures should be put in place to increase the number of direct flights to the region from our various key source markets.

Table 4: Arrivals by Point of Entry and Purpose of Visit, 2024

| Point of Entry/ Purpose of Visit | Business/ Conference | Education | Employment Related | Holiday/ Leisure | In Transit | Medical | Religion | Sports | Visiting Family and Relatives | Total (%) |
|-------------------------------------|-------------------------|-----------|-----------------------|---------------------|---------------|---------|----------|--------|-------------------------------------|--------------|
| JKIA | 24.2 | 0.7 | 0.4 | 48.7 | 5.3 | 0.4 | 0.4 | 0.2 | 19.8 | 100 |
| MIA | 4.7 | 0.3 | 0.2 | 89.8 | 1.3 | 0.1 | 0.1 | 0.1 | 3.4 | 100 |
| BUSIA | 42.8 | 2.6 | 0.3 | 7.1 | 2.5 | 0.8 | 2.1 | 1.2 | 40.6 | 100 |
| NAMANGA | 53.7 | 2.4 | 0.2 | 20.8 | 3.3 | 1.2 | 1.5 | 0.3 | 16.7 | 100 |
| MALABA | 61 | 1.5 | 0.3 | 13.4 | 1 | 0.5 | 1.5 | 0.6 | 20.2 | 100 |
| LUNGALUNGA | 11 | 0.5 | 0 | 12.1 | 0.2 | 0.4 | 2.4 | 0.1 | 73.3 | 100 |
| TAVETA | 46.2 | 0.3 | 0.1 | 6.5 | 0 | 0.1 | 2.8 | 0.1 | 43.9 | 100 |
| LWAKHAKHA | 50.2 | 0.3 | 1.9 | 6.5 | 0.2 | 0.3 | 1.4 | 0.1 | 39 | 100 |
| ISEBANIA | 10.4 | 1.3 | 0.3 | 38.1 | 3.9 | 1 | 4.3 | 0.3 | 40.4 | 100 |
| LOITOKTOK | 63.9 | 1.9 | 0 | 11.3 | 1.7 | 0.5 | 4.6 | 0.2 | 15.9 | 100 |
| MOYALE | 0.9 | 0.3 | 0.5 | 7.8 | 1.5 | 0.5 | 2.2 | 0 | 86.2 | 100 |
| WILSON AIRPORT | 14.4 | 0.4 | 0.3 | 46.5 | 2.6 | 3 | 0 | 0 | 32.8 | 100 |
| KILINDINI SEAPORT | 0 | 0 | 0 | 100 | 0 | 0 | 0 | 0 | 0 | 100 |
| SUAM | 43.1 | 0.9 | 0.2 | 12.4 | 0.5 | 2.2 | 4.8 | 1.7 | 34.2 | 100 |
| GARISSA/TANA BRIDGE | 7.1 | 0 | 0 | 4.4 | 0 | 0 | 0 | 0.1 | 88.4 | 100 |
| KISUMU AIRPORT | 3.1 | 0.1 | 0.3 | 96.1 | 0.2 | 0.2 | 0 | 0 | 0.1 | 100 |
| SHIMONI SEAPORT | 4.6 | 0.1 | 0 | 2 | 0 | 0 | 0 | 0 | 93.2 | 100 |
| NADAPAL | 6 | 0.8 | 0 | 4.2 | 1.3 | 0.9 | 2.3 | 0 | 84.5 | 100 |
| ELDORET AIRPORT | 43 | 0 | 0 | 2.6 | 0 | 5.7 | 0 | 0 | 48.7 | 100 |
| KISUMU PIER | 63 | 0 | 0 | 11.9 | 0 | 0 | 0 | 0 | 25.1 | 100 |
| WAJIR AIRPORT | 98.5 | 0 | 1.5 | 0 | 0 | 0 | 0 | 0 | 0 | 100 |
| MUHURU BAY | 4.1 | 1.4 | 0 | 2.7 | 0 | 0 | 4.1 | 1.4 | 86.3 | 100 |
| SHIMONI | 6.3 | 0 | 0 | 51.6 | 0 | 0 | 0 | 0 | 42.2 | 100 |
| MALINDI AIRPORT | 1.8 | 0 | 0 | 51.8 | 0 | 0 | 1.8 | 0 | 44.6 | 100 |
| ISIOLO AIRPORT | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 100 | 100 |
| LOKICHOGIO AIRPORT | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 100 | 100 |

Source: Directorate of Immigration Services

3.8. Top 30 source markets by entry points, 2024

The data shows that JKIA and MIA handle the highest number of travellers, with JKIA leading across almost all nationalities, particularly from the United States, United Kingdom, India, China, and Germany, indicating its role as the primary international gateway. MIA sees a significant number of Italian and Polish visitors, likely due to holiday tourism along the Kenyan coast. Border points like Busia, Namanga, and Malaba are heavily used by travellers from Uganda, Tanzania, and Rwanda, reflecting strong regional

movement for business and personal visits. South Sudanese and Somali travellers primarily enter through Wajir, Nadapal, and Lokichogio, suggesting proximity-based migration and trade. Meanwhile, Kilindini Seaport and Kisumu Airport process lower numbers but remain key entry points for specific nationalities, such as Italians at Kilindini, for holiday/leisure. The data highlights Kenya's diverse entry points, each serving distinct traveller demographics based on purpose of visit.



Table 5: Top 30 source markets by entry points, 2024

| S/NO | Country | JKIA | BUSIA | NAMANGA | MIA | MALABA | LOITOKTOK | LWAKHAKHA | LUNGALUNGA | TAVETA | ISEBANIA | MOYALE | SUAM | WILSON AIRPORT | GARISSA/TANA BRIDGE | NADAPAL | KISUMU AIRPORT | ELDORET AIRPORT | KILINDINI SEAPORT | SHIMONI SEAPORT | MUHURU BAY | WAJIR AIRPORT | MALINDI AIRPORT | KISUMU PIER | SHIMONI | LOKICHOGIO AIRPORT | ISIOLO AIRPORT | Total |
|------|------------------------------|---------|--------|---------|--------|--------|-----------|-----------|------------|--------|----------|--------|-------|----------------|---------------------|---------|----------------|-----------------|-------------------|-----------------|------------|---------------|-----------------|-------------|---------|--------------------|----------------|---------|
| 1 | United States | 273,907 | 2,280 | 8,371 | 5,606 | 669 | 269 | 24 | 531 | 216 | 5,575 | 98 | 86 | 5,083 | 572 | 36 | 1,042 | 87 | 1,902 | 3 | 12 | 130 | 2 | | | | | 306,501 |
| 2 | Uganda | 56,159 | 94,953 | 4,987 | 4,666 | 33,457 | 531 | 25,232 | 620 | 816 | 495 | 108 | 3,332 | 80 | 8 | 62 | 35 | 6 | 1 | 1 | | | 10 | | | | | 225,559 |
| 3 | United Republic of Tanzania | 30,319 | 3,903 | 90,376 | 2,306 | 1,338 | 18,406 | 1,015 | 35,650 | 9,961 | 8,075 | 72 | 13 | 183 | 6 | 8 | 2 | | 7 | 1,438 | 52 | | 4 | 97 | 59 | | | 203,290 |
| 4 | United Kingdom | 161,910 | 1,746 | 2,965 | 9,597 | 374 | 222 | 9 | 701 | 299 | 632 | 24 | 39 | 526 | 41 | 1 | 66 | 17 | 1,444 | 6 | | | 20 | | | | | 180,639 |
| 5 | India | 116,640 | 4,276 | 3,649 | 4,307 | 903 | 270 | 6 | 464 | 131 | 536 | 31 | 61 | 159 | 11 | 3 | 39 | | 3 | | | | | 81 | | | | 131,570 |
| 6 | Italy | 29,719 | 241 | 390 | 61,026 | 18 | 15 | 1 | 71 | 42 | 90 | 10 | 8 | 72 | 1 | | 5 | 9 | 109 | | | | 15 | | | | | 91,842 |
| 7 | Germany | 47,425 | 844 | 1,927 | 35,332 | 209 | 336 | 6 | 317 | 239 | 244 | 39 | 56 | 96 | 4 | 5 | 18 | 4 | 449 | 5 | | | 1 | | | | | 87,556 |
| 8 | China | 84,107 | 1,004 | 2,246 | 895 | 238 | 197 | 1 | 69 | 32 | 1,065 | 112 | 16 | 110 | 6 | 4 | 16 | 10 | 331 | 3 | | | | | | | | 90,462 |
| 9 | Somalia | 78,645 | 250 | 88 | 402 | 1,625 | 13 | 59 | 29 | 1 | 3 | 34 | | 31 | 357 | 18 | | | | | | | | | | | | 81,555 |
| 10 | Rwanda | 20,996 | 24,336 | 960 | 140 | 3,579 | 350 | 853 | 304 | 14,149 | 127 | 19 | 11 | 18 | 3 | 18 | 3 | | | | | | | | | | | 65,866 |
| 11 | France | 49,664 | 387 | 634 | 3,200 | 49 | 39 | 2 | 127 | 76 | 58 | 15 | 27 | 81 | - | | 3 | 4 | 462 | 4 | 1 | | 1 | | 5 | | | 54,839 |
| 12 | Burundi | 12,801 | 17,504 | 3,660 | 108 | 1,684 | 63 | 95 | 419 | 6,240 | 9,250 | 23 | 2 | 14 | 2 | | | | | | | | | | | | | 51,865 |
| 13 | Ethiopia | 34,864 | 453 | 218 | 3,564 | 763 | 8 | 186 | 24 | 1 | 5 | 7,814 | 1 | 30 | 331 | 24 | 4 | | 1 | | | | | | | | | 48,291 |
| 14 | Canada | 41,801 | 404 | 1,315 | 2,083 | 158 | 47 | 7 | 185 | 103 | 362 | 13 | 12 | 393 | 58 | | 127 | | 676 | | 1 | | | | | | | 47,745 |
| 15 | South Sudan | 30,485 | 10,235 | 573 | 143 | 2,177 | 16 | 190 | 52 | 2 | 13 | 147 | 21 | 265 | 6 | 886 | 1 | 35 | | | | | | | | 3 | | 45,250 |
| 16 | Democratic Republic of Congo | 21,337 | 8,839 | 1,871 | 327 | 1,726 | 140 | 3,899 | 274 | 62 | 385 | 32 | 5 | 85 | 1 | | | | | | 3 | | | | | | | 38,986 |
| 17 | South Africa | 36,312 | 273 | 505 | 657 | 34 | 40 | 4 | 77 | 51 | 92 | 4 | 6 | 134 | 1 | | 22 | 1 | 23 | 4 | | | 5 | | | 2 | | 38,247 |
| 18 | Netherlands | 34,019 | 378 | 1,119 | 1,594 | 89 | 123 | 1 | 115 | 96 | 123 | 7 | 35 | 81 | 23 | | 19 | 1 | 69 | 3 | 2 | | | | | 1 | | 37,898 |
| 19 | Nigeria | 31,951 | 603 | 212 | 756 | 159 | 6 | 3 | 16 | 2 | 15 | 65 | 1 | 5 | - | 9 | 1 | | | | | | | | | | | 33,804 |
| 20 | Poland | 6,338 | 49 | 495 | 25,658 | 10 | 32 | | 25 | 43 | 204 | | 3 | 5 | - | | | 3 | 7 | | | | | | | | | 32,872 |
| 21 | Spain | 25,248 | 145 | 576 | 1,022 | 22 | 76 | | 42 | 26 | 374 | 4 | 1 | 69 | - | | 13 | | 125 | 1 | | | | | | | | 27,744 |
| 22 | Australia | 22,943 | 462 | 1,549 | 582 | 211 | 249 | | 48 | 37 | 737 | 14 | 9 | 280 | 16 | 2 | 40 | | 217 | | | | | | | | | 27,396 |
| 23 | Sweden | 19,787 | 189 | 267 | 1,668 | 52 | 12 | 3 | 84 | 34 | 19 | 1 | 4 | 32 | 27 | | 1 | | 43 | | | | 1 | | | | | 22,224 |
| 24 | Ghana | 15,988 | 191 | 159 | 333 | 32 | 11 | 6 | 14 | 2 | 12 | 6 | 1 | 2 | - | | | | | | | | | | | | | 16,757 |
| 25 | Zimbabwe | 14,716 | 247 | 525 | 231 | 53 | 8 | 5 | 39 | 19 | 35 | 6 | 1 | 6 | - | | | | 2 | | | | 1 | | | 1 | | 15,895 |
| 26 | Belgium | 12,646 | 135 | 247 | 2,229 | 25 | 22 | | 37 | 12 | 39 | 1 | 9 | 62 | - | | 3 | | 50 | | | | 1 | | | | | 15,518 |

| | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|------|---------------------------------|--------|-------|---------|-------|--------|-----------|-----------|------------|--------|----------|--------|------|----------------|---------------------|---------|----------------|-----------------|-------------------|-----------------|------------|---------------|-----------------|-------------|---------|--------------------|----------------|--------|
| S/NO | Country | JKIA | BUSIA | NAMANGA | MIA | MALABA | LOITOKTOK | LWAKHAKHA | LUNGALUNGA | TAVETA | ISEBANIA | MOYALE | SUAM | WILSON AIRPORT | GARISSA/TANA BRIDGE | NADAPAL | KISUMU AIRPORT | ELDORET AIRPORT | KILINDINI SEAPORT | SHIMONI SEAPORT | MUHURU BAY | WAJIR AIRPORT | MALINDI AIRPORT | KISUMU PIER | SHIMONI | LOKICHOGIO AIRPORT | ISIOLO AIRPORT | Total |
| 27 | Norway | 13,436 | 270 | 267 | 903 | 56 | 1 | 1 | 35 | 59 | 35 | 3 | 7 | 19 | 10 | | | 40 | | | | | | | | | | 15,142 |
| 28 | Denmark | 12,391 | 106 | 198 | 1,945 | 16 | 10 | | 77 | 33 | 45 | 1 | 9 | 8 | 4 | | 3 | 12 | | | | | | | | | | 14,858 |
| 29 | Switzerland | 10,246 | 105 | 236 | 3,431 | 39 | 21 | | 49 | 36 | 74 | 15 | 18 | 56 | 3 | | 14 | 20 | 97 | 1 | 1 | | 3 | | | | | 14,465 |
| 30 | Republic of Korea (South Korea) | 10,136 | 246 | 1,628 | 273 | 14 | 107 | 1 | 10 | 17 | 38 | 12 | 11 | 9 | - | | | 2 | | | | | | | | | | 12,504 |

Source: Directorate of Immigration Services

3.9. Arrival Share by Purpose of Visit and Region

It is noted that the most prominent purpose for travel by Africans is for business/conference accounting for 40.1% of the total arrivals followed by visiting friends and relatives having 32.2%, holiday/leisure had 17.1%, employment related recorded the lowest with 0.4%. The most arrivals

from Europe, America, Asia, Oceania and Middle East came for holiday/leisure accounting for 70.6%, 61.4%, 50.4%, 64.3% and 52.3% of their arrivals respectively. Medical, religion and sports recorded the lowest percentage.

Purpose of Visit by Region

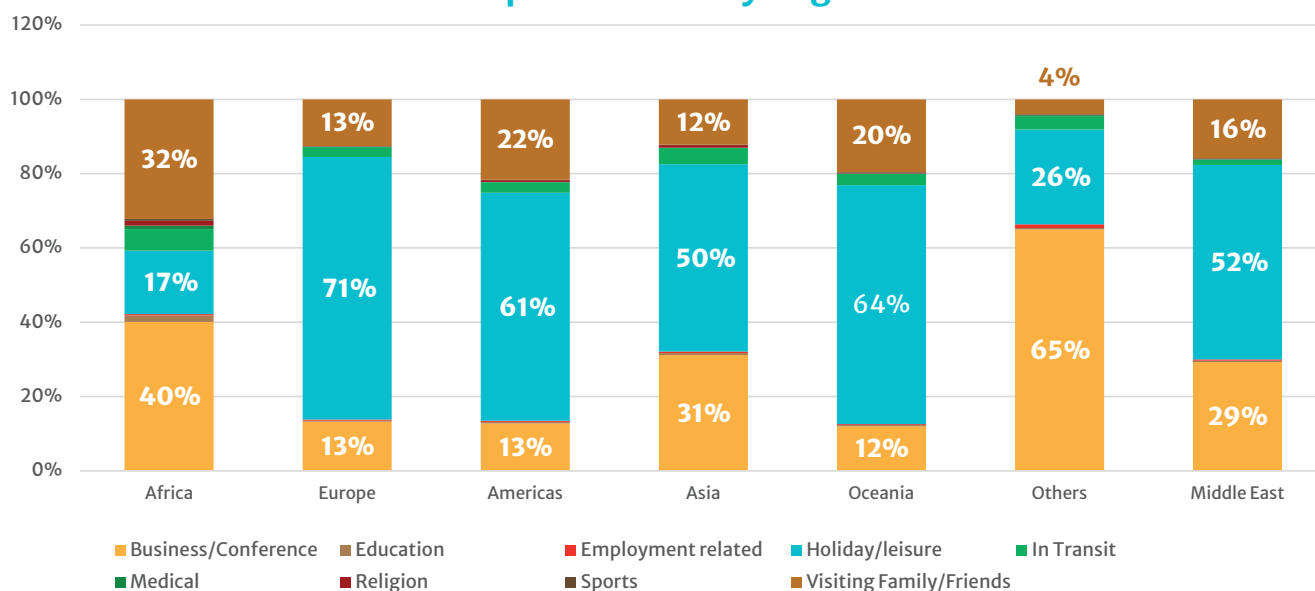


Figure 8: Arrival Share by Purpose of Visit and Region, 2024

Source: Directorate of Immigration Services

3.10. Top Source Markets by Region

In 2024 Kenya received 975,883 arrivals from Africa, the highest number of arrivals from the region was registered from Uganda at 225,559, followed by the United Republic of Tanzania at 203,290, at the third position was Somalia at 81,555.

Europe contributed 680,373 to the total arrivals in 2024 with the United Kingdom contributing the largest number at 180,639 followed by Italy at 91,842 and Germany at 87,556.

Kenya received 376,019 international arrivals from the Americas region with the highest arrivals being from the United States of America at 306,501, Canada was second at 47,745 and Mexico at third place with 5,119.

Asia registered a commendable performance of 284,277 arrivals, which may be attributed to the full resumption of travel, post the Covid 19 pandemic. India registered the highest performance in the region contributing to 131,570 arrivals, China was second at 90,462 while South Korea was third at 12,504.

The Middle East registered 19,559 arrivals with the highest number of arrivals being received from Israel at 4,756 followed by the Islamic Republic of Iran at 2,709 and Yemen closely at 2,067.

The Oceania region contributed 31,615 visitors, the highest number of arrivals was registered from Australia at 27,396, New Zealand 3,746 and Fiji at 260.

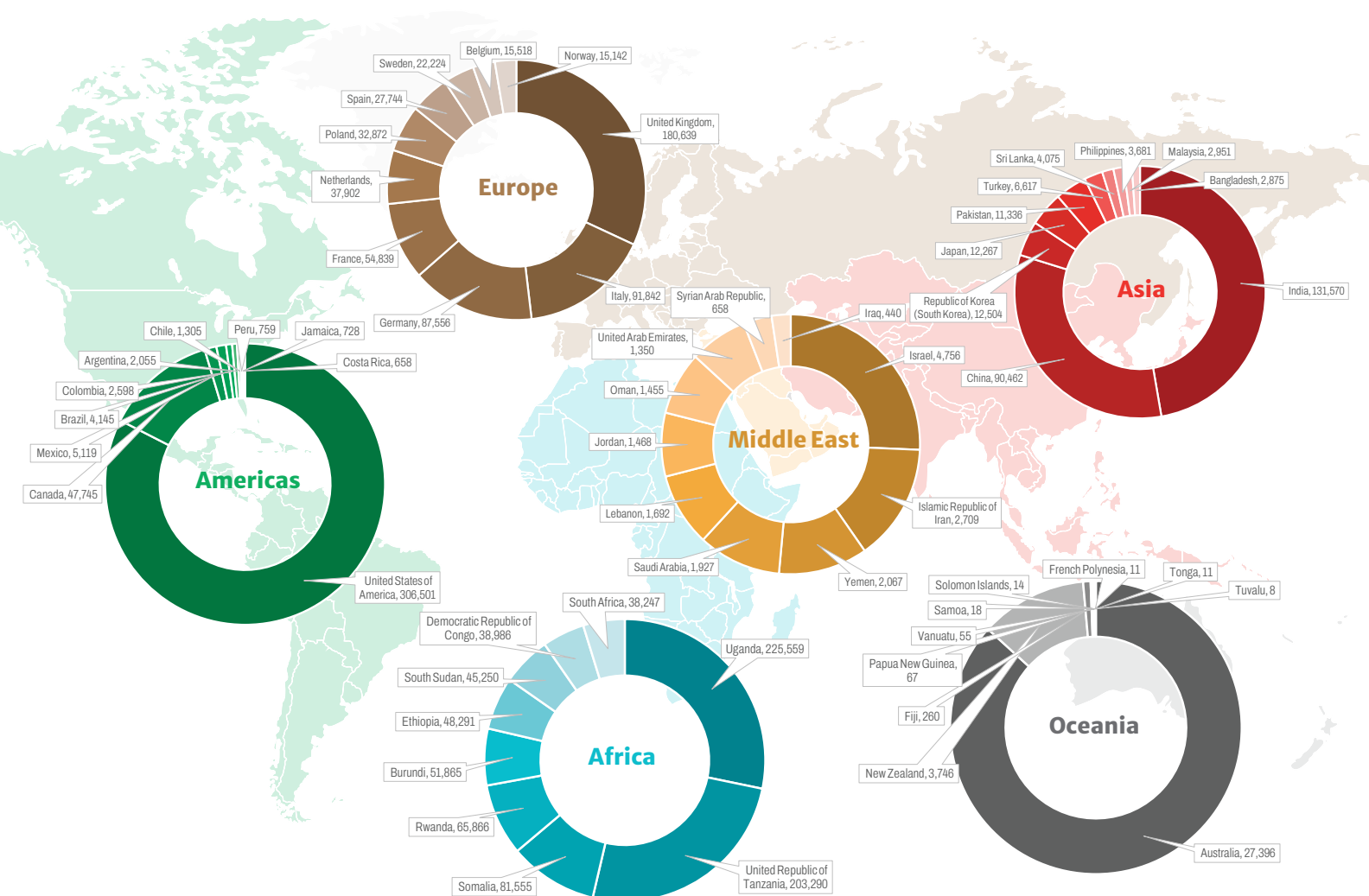


Figure 9: Top Source Market by Region, 2024

Source: Directorate of Immigration Services

3.11. Main Purpose of Visit by Top Source Markets

The main purpose of visit by the top source of markets from the European region was holiday/leisure with visitors from the United Kingdom, Italy, Germany and France accounting for 58%, 89%, 77% and 65%, respectively in 2024. In the African region was business/conference with those from

Uganda, Tanzania and Rwanda accounting for 47% each, respectively in the period under review. However, the same African region was highest for those visiting friends and relatives from Somalia, Burundi, Ethiopia and South Sudan at 61%, 49%, 39% and 53%, respectively in 2024.

Table 6: Main Purpose of Visit by Top Source Markets, 2024

| EUROPE | Purpose | Arrivals | % | AFRICA | Purpose | Arrivals | % |
|-----------------------|----------------------------|----------|----|-------------------------------------|----------------------------|----------|----|
| United Kingdom | Holiday/Leisure | 104473 | 58 | Uganda | Business/Conference | 105397 | 47 |
| | visiting friends/relatives | 37395 | 21 | | visiting friends/relatives | 66343 | 29 |
| Italy | Holiday/Leisure | 81326 | 89 | United Republic Of Tanzania | Business/Conference | 94662 | 47 |
| | Business/Conference | 5632 | 6 | | visiting friends/relatives | 66386 | 33 |
| Germany | Holiday/Leisure | 67022 | 77 | Somali | visiting friends/relatives | 49967 | 61 |
| | Business/Conference | 9208 | 11 | | Holiday/Leisure | 18864 | 23 |
| France | Holiday/Leisure | 35886 | 65 | Rwanda | Business/Conference | 30896 | 47 |
| | Business/Conference | 9034 | 16 | | visiting friends/relatives | 23738 | 36 |
| Netherlands | Holiday/Leisure | 23711 | 63 | Burundi | visiting friends/relatives | 25221 | 49 |
| | Business/Conference | 6616 | 17 | | Business/Conference | 18046 | 35 |
| Poland | Holiday/Leisure | 30738 | 94 | Ethiopia | visiting friends/relatives | 18659 | 39 |
| | Business/Conference | 788 | 2 | | Business/Conference | 14152 | 29 |
| Spain | Holiday/Leisure | 22291 | 80 | South Sudan | visiting friends/relatives | 24016 | 53 |
| | Business/Conference | 2697 | 10 | | Business/Conference | 9796 | 22 |
| Sweden | Holiday/Leisure | 12185 | 55 | Democratic Republic Of Congo | Business/Conference | 15072 | 39 |
| | visiting friends/relatives | 6303 | 28 | | visiting friends/relatives | 9991 | 26 |
| Belgium | Holiday/Leisure | 10490 | 68 | South Africa | Business/Conference | 16544 | 43 |
| | Business/Conference | 2505 | 16 | | Holiday/Leisure | 13022 | 34 |
| Norway | Holiday/Leisure | 9194 | 61 | Nigeria | Business/Conference | 12115 | 36 |
| | visiting friends/relatives | 3748 | 25 | | Holiday/Leisure | 11998 | 35 |

Source: Directorate of Immigration Services

The main purpose of visit by the top source of markets from the Asia region was holiday/leisure with visitors from India, China, Republic of Korea (South Korea) and Japan accounting for 42%, 34%, 65% and 51%, respectively in 2024. In the

Middle East region was holiday/leisure with those from Israel, Islamic Republic of Iran, Yemen and Saudi Arabia accounting for 62%, 68%, 35%, and 50% respectively in the period under review.

Main Purpose of Visit by Top Source Markets, 2024 cont'

| ASIA | Purpose | Arrivals | % | MIDDLE EAST | Purpose | Arrivals | % |
|---------------------------------|---------------------|----------|----|--------------------------|----------------------------|----------|----|
| India | Holiday/Leisure | 55675 | 42 | Israel | Holiday/Leisure | 2964 | 62 |
| | Business/Conference | 44264 | 34 | | Business/Conference | 1303 | 27 |
| China | Holiday/Leisure | 56338 | 62 | Islamic Republic of Iran | Holiday/Leisure | 1835 | 68 |
| | Business/Conference | 23926 | 26 | | Business/Conference | 486 | 18 |
| Republic of Korea (South Korea) | Holiday/Leisure | 8144 | 65 | Yemen | Holiday/Leisure | 732 | 35 |
| | Business/Conference | 2729 | 22 | | Visiting friends/relatives | 706 | 34 |
| Japan | Holiday/Leisure | 6284 | 51 | Saudi Arabia | Holiday/Leisure | 957 | 50 |
| | Business/Conference | 4566 | 37 | | Business/Conference | 638 | 33 |
| Pakistan | Holiday/Leisure | 3956 | 35 | Lebanon | Business/Conference | 840 | 50 |
| | Business/Conference | 4462 | 39 | | Holiday/Leisure | 608 | 36 |
| Turkey | Holiday/Leisure | 3574 | 54 | Jordan | Holiday/Leisure | 665 | 45 |
| | Business/Conference | 2069 | 31 | | Business/Conference | 631 | 43 |
| Sri Lanka | Business/Conference | 1842 | 45 | Oman | Holiday/Leisure | 729 | 50 |
| | Holiday/Leisure | 1397 | 34 | | visiting friends/relatives | 525 | 36 |
| Philippines | Holiday/Leisure | 1675 | 46 | United Arab Emirates | Holiday/Leisure | 786 | 58 |
| | Business/Conference | 1215 | 33 | | visiting friends/relatives | 289 | 21 |
| Malaysia | Holiday/Leisure | 1852 | 63 | Syria Arab Republic | Holiday/Tourism | 283 | 43 |
| | Business/Conference | 715 | 24 | | Business/Conference | 244 | 37 |
| Bangladesh | Business/Conference | 1232 | 43 | Iraq | Business/Conference | 238 | 54 |
| | Holiday/Leisure | 1010 | 35 | | Holiday/Tourism | 139 | 32 |

Source: Directorate of Immigration Services

The main purpose of visit by the top source of markets from the Americas region was holiday/leisure, with visitors from the United States, Canada, Mexico and Brazil accounting for 61%, 59%, 76%, and 63%, respectively, in 2024. The Oceania region was also holiday/leisure with those from

Australia, New Zealand and Vanuatu accounting for 65%, 67%, and 55% respectively in the period under review. However, Business/conference was leading for Fiji, Papua New Guinea and Samoa accounting for 62%, 37% and 56% respectively.

Main Purpose of Visit by Top Source Markets, 2024 cont'

| AMERICAS | Purpose | Arrivals | % | OCEANIA | Purpose | Arrivals | % |
|---------------|----------------------------|----------|----|------------------|----------------------------|----------|----|
| United States | Holiday/Leisure | 187991 | 61 | Australia | Holiday/Leisure | 17696 | 65 |
| | visiting friends/relatives | 68835 | 22 | | visiting friends/relatives | 5512 | 20 |
| Canada | Holiday/Leisure | 28406 | 59 | New Zealand | Holiday/Leisure | 2505 | 67 |
| | visiting friends/relatives | 10835 | 23 | | visiting friends/relatives | 612 | 16 |
| Mexico | Holiday/Leisure | 3916 | 76 | Fiji | Business/Conference | 161 | 62 |
| | Business/Conference | 504 | 10 | | Holiday/Leisure | 59 | 23 |
| Brazil | Holiday/Leisure | 2605 | 63 | Papua New Guinea | Business/Conference | 25 | 37 |
| | Business/Conference | 947 | 23 | | Holiday/Leisure | 21 | 31 |
| Colombia | Holiday/Leisure | 1660 | 64 | Vanuatu | Holiday/Leisure | 30 | 55 |
| | Business/Conference | 634 | 24 | | Business/Conference | 17 | 31 |
| Argentina | Holiday/Leisure | 1520 | 74 | Samoa | Business/Conference | 10 | 56 |
| | Business/Conference | 330 | 16 | | Religion | 4 | 22 |

| AMERICAS | Purpose | Arrivals | % | OCEANIA | Purpose | Arrivals | % |
|------------|----------------------------|----------|-----|------------------|----------------------------|----------|----|
| Chile | Holiday/Tourism | 943 | 72 | Solomon Islands | Holiday/Tourism | 8 | 57 |
| | Business/Conference | 197 | 15 | | Visiting Friends/Relatives | 4 | 29 |
| Peru | Holiday/Tourism | 476 | 63 | French Polynesia | Holiday/Tourism | 6 | 55 |
| | Business/Conference | 164 | 22% | | Business/Conference | 4 | 36 |
| Jamaica | Holiday/Tourism | 416 | 57 | Tonga | Religion | 5 | 45 |
| | Visiting Friends/Relatives | 124 | 17 | | Business/Conference | 4 | 36 |
| Costa Rica | Holiday/Tourism | 466 | 71 | Tuvalu | Business/Conference | 3 | 38 |
| | Business/Conference | 107 | 16 | | Holiday/Tourism | 3 | 38 |

Source: Directorate of Immigration Services

3.12. East African Community (EAC) Arrivals by Purpose of Visit

Table 7 illustrates the distribution of travellers by purpose across seven countries: Uganda had the largest share of arrivals at 31.7% followed by Tanzania at 28.5%, Somalia (11.4%), Rwanda (9.2%), Burundi (7.3%), South Sudan (6.4%), and the

Democratic Republic of Congo (5.5%). Business/conference and visiting friends and relatives dominate travel trends of EAC arrivals at 40.0% and 37.3% respectively. Leisure and other travel purposes remain secondary as shown in table 7.

Table 7: East African Community (EAC) Arrivals by Purpose of Visit, 2024

| Country | Business/ Conference | Education | Employment Related | Holiday/ Leisure | In Transit | Medical | Religion | Sports | Visiting Friends and Relatives | Total | % |
|------------------------------|-------------------------|-----------|-----------------------|---------------------|------------|---------|----------|--------|--------------------------------------|---------|-------|
| Uganda | 105,397 | 4,792 | 1,466 | 29,668 | 8,867 | 2,111 | 4,289 | 2,626 | 66,343 | 225,559 | 31.7 |
| United Republic of Tanzania | 94,662 | 4,423 | 290 | 21,674 | 7,599 | 2,246 | 5,415 | 595 | 66,386 | 203,290 | 28.5 |
| Somalia | 11,135 | 293 | 193 | 18,864 | 406 | 614 | 23 | 60 | 49,967 | 81,555 | 11.4 |
| Rwanda | 30,896 | 1,109 | 185 | 6,644 | 2,238 | 561 | 288 | 207 | 23,738 | 65,866 | 9.2 |
| Burundi | 18,046 | 560 | 227 | 4,332 | 2,695 | 342 | 258 | 184 | 25,221 | 51,865 | 7.3 |
| South Sudan | 9,796 | 1,541 | 119 | 7,383 | 1,075 | 1,044 | 151 | 125 | 24,016 | 45,250 | 6.4 |
| Democratic Republic of Congo | 15,072 | 990 | 107 | 5,736 | 5,459 | 1,026 | 525 | 80 | 9,991 | 38,986 | 5.5 |
| Total | 285,004 | 13,708 | 2,587 | 94,301 | 28,339 | 7,944 | 10,949 | 3,877 | 265,662 | 712,371 | 100.0 |
| % | 40.0 | 1.9 | 0.4 | 13.2 | 4.0 | 1.1 | 1.5 | 0.5 | 37.3 | 100.0 | - |

Source: Directorate of Immigration Service

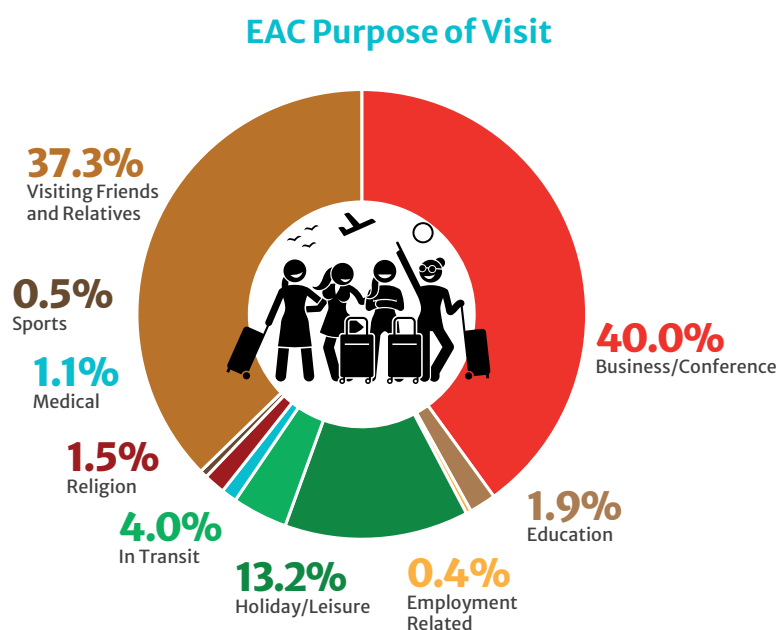


Figure 10: East African Community (EAC) Arrivals by Purpose of Visit, 2024

Source: Directorate of Immigration Service

3.13. EAC Arrivals by Point of Entry

JKIA received the highest number of EAC arrivals at 250,742 followed by Busia and Namanga Borders at 160,020 and 102,515 respectively. However, it is worth noting that a

majority of the EAC arrivals were through the land borders, this indicates that there is a lot of cross-border movement within the East African Community.

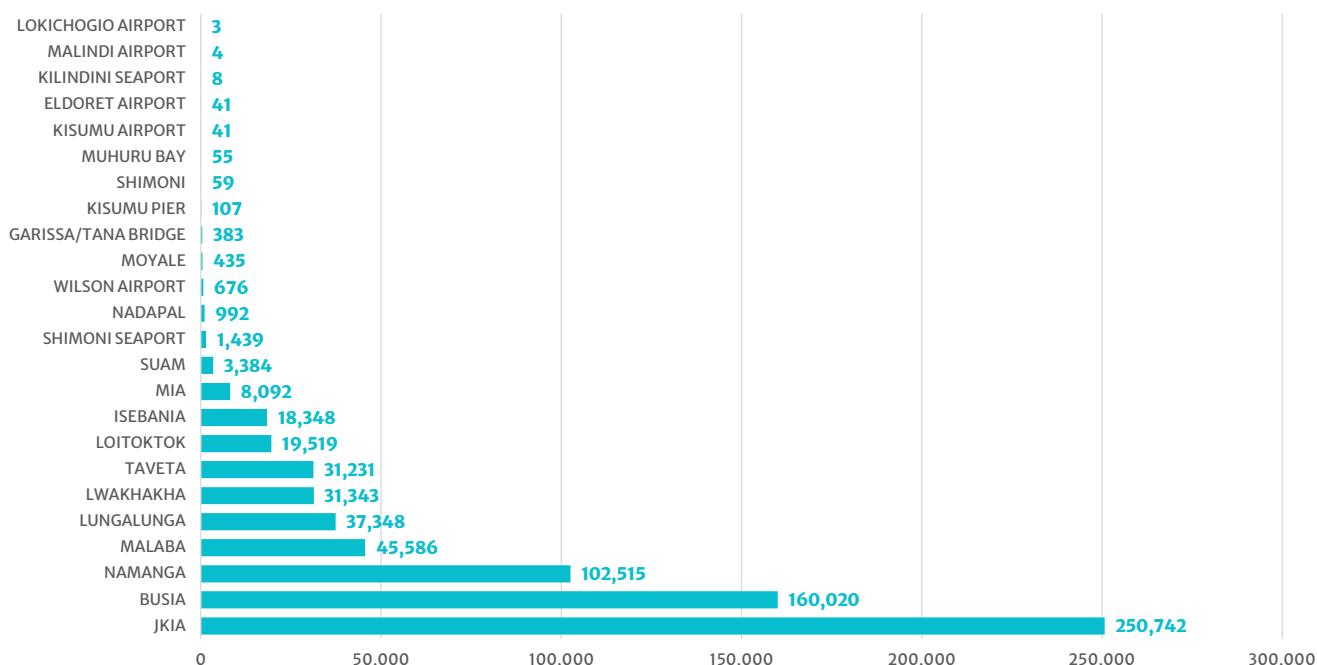


Figure 11: EAC Arrivals by Point of Entry, 2024

Source: Directorate of Immigration Services

3.14. Cruise Tourism performance

Cruise tourists showed an exemplary performance with the destination receiving 6,561 tourists in 2024 up from 2,490

in 2023 representing an increase of 163.5%. This indicates the huge potential cruise tourism has for the destination.

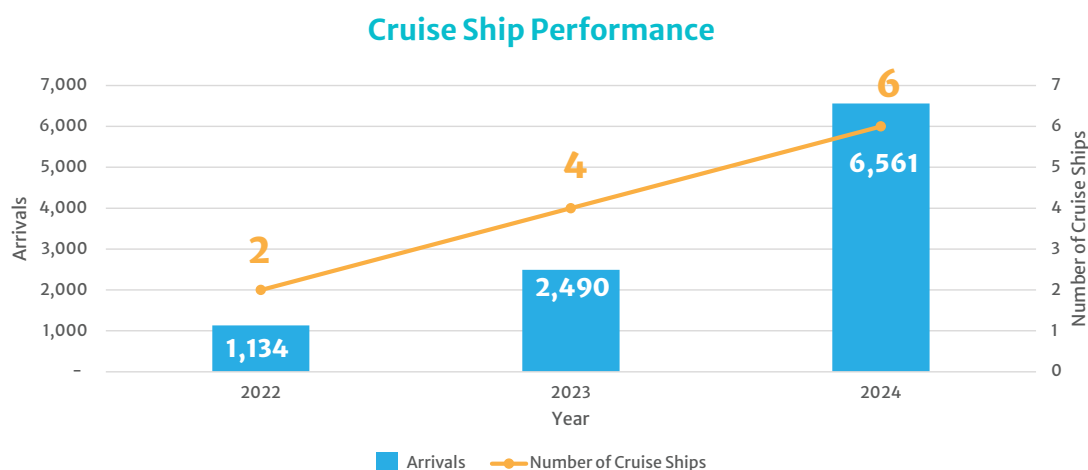
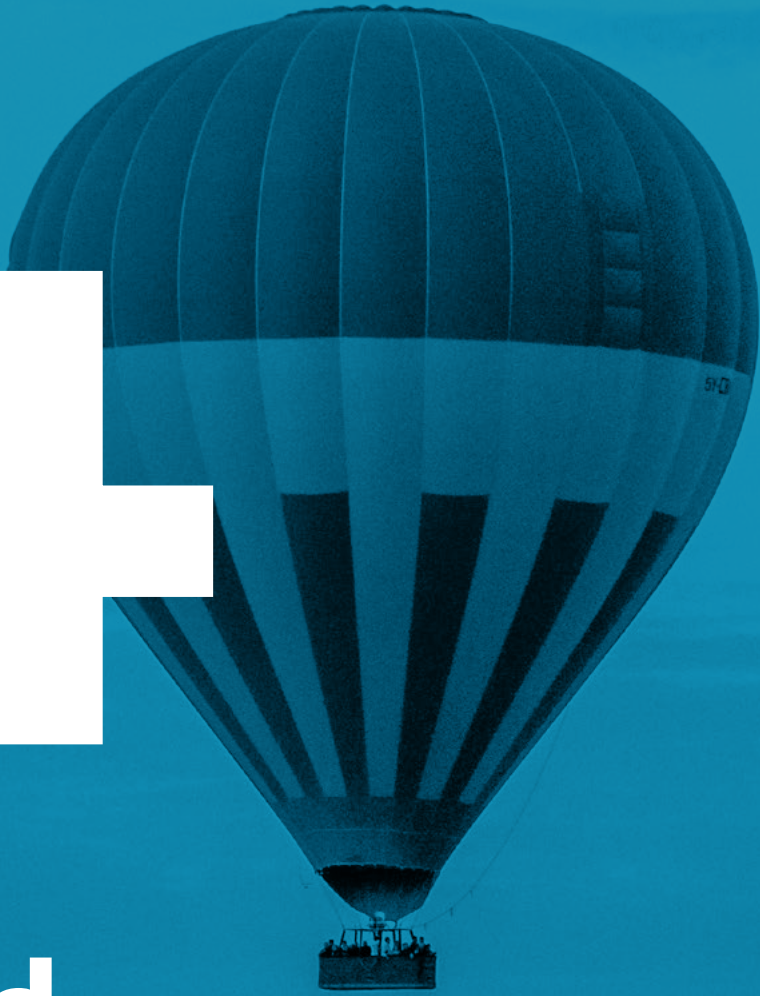


Figure 12: Cruise Tourism Performance, 2022 – 2024

Source: Directorate of Immigration Services

4

Inbound Tourism Earnings



The inbound tourism earnings increased to Kshs. 452.20 billion in the year 2024 compared to Kshs. 377.49 billion in 2023 translating to a growth of 19.79% as shown in Figure 13.

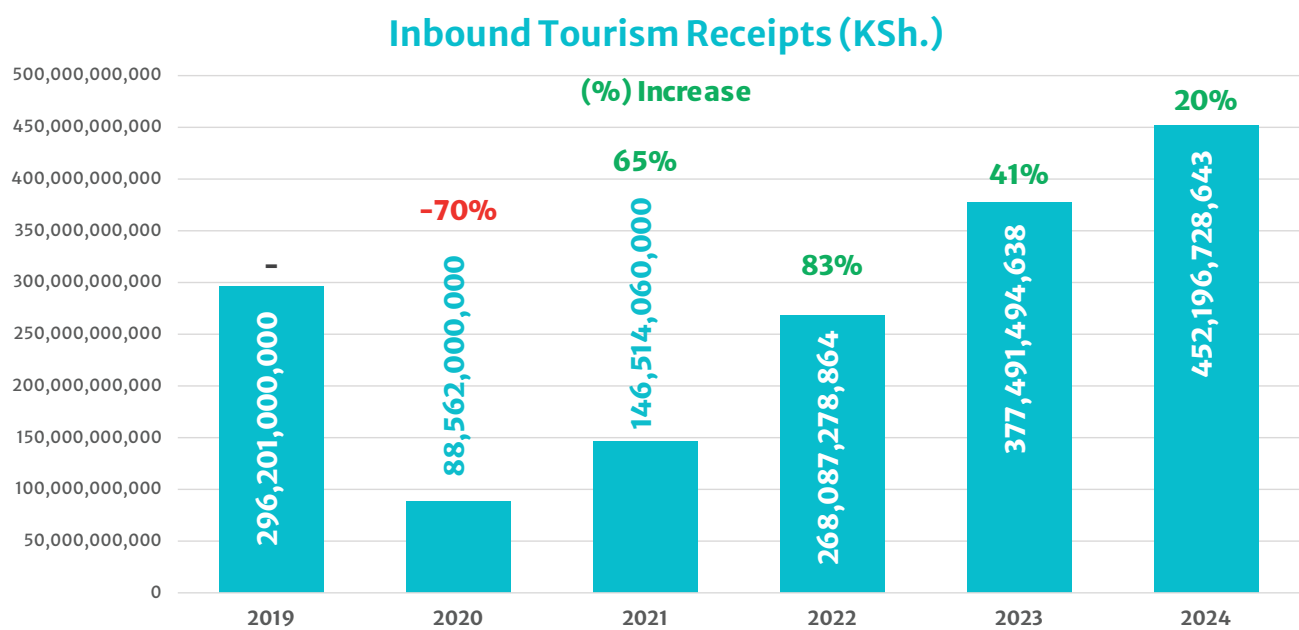


Figure 13: Inbound Tourism Earnings, 2019 –2024

Source: Tourism Research Institute



5

Accommodation

5.1. Bed Capacity

Table 8 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 17.9% of the total.

Kilifi had 11.1% of the total. Nakuru and Mombasa had significant number of beds at 9.0% and 7.7% respectively.

Table 8: Bed Capacity per County

| S/NO | COUNTY | NUMBER OF BEDS | % | S/NO | COUNTY | NUMBER OF BEDS | % |
|------|--------------|----------------|------|-----------------------------|-----------------|----------------|--------------|
| 1 | Nairobi | 24,151 | 17.9 | 24 | Kiambu | 1,434 | 1.1 |
| 2 | Kilifi | 14,997 | 11.1 | 25 | Kirinyaga | 1,416 | 1.0 |
| 3 | Nakuru | 12,140 | 9.0 | 26 | Murang'a | 1,411 | 1.0 |
| 4 | Mombasa | 10,357 | 7.7 | 27 | Lamu | 1,319 | 1.0 |
| 5 | Narok | 6,830 | 5.1 | 28 | Kericho | 1,175 | 0.9 |
| 6 | Kwale | 6,610 | 4.9 | 29 | Turkana | 1,076 | 0.8 |
| 7 | Kisumu | 5,923 | 4.4 | 30 | Isiolo | 903 | 0.7 |
| 8 | Uasin Gishu | 4,963 | 3.7 | 31 | Bomet | 796 | 0.6 |
| 9 | Laikipia | 4,430 | 3.3 | 32 | Baringo | 735 | 0.5 |
| 10 | Machakos | 2,536 | 1.9 | 33 | Elgeyo Marakwet | 700 | 0.5 |
| 11 | Kisii | 2,490 | 1.8 | 34 | Vihiga | 671 | 0.5 |
| 12 | Taita Taveta | 2,459 | 1.8 | 35 | Nandi | 629 | 0.5 |
| 13 | Embu | 2,215 | 1.6 | 36 | Makueni | 625 | 0.5 |
| 14 | Meru | 2,170 | 1.6 | 37 | Tana river | 624 | 0.5 |
| 15 | Bungoma | 2,047 | 1.5 | 38 | Samburu | 614 | 0.5 |
| 16 | Kakamega | 1,988 | 1.5 | 39 | Kitui | 608 | 0.5 |
| 17 | Migori | 1,979 | 1.5 | 40 | Tharak Nithi | 512 | 0.4 |
| 18 | Busia | 1,978 | 1.5 | 41 | West Pokot | 362 | 0.3 |
| 19 | Kajiado | 1,864 | 1.4 | 42 | Nyandarua | 360 | 0.3 |
| 20 | Homabay | 1,778 | 1.3 | 43 | Marsabit | 220 | 0.2 |
| 21 | Nyeri | 1,753 | 1.3 | 44 | Nyamira | 156 | 0.1 |
| 22 | Trans Nzoia | 1,601 | 1.2 | Total Number of Beds | | 135,085 | 100.0 |
| 23 | Siaya | 1,480 | 1.1 | | | | |

Source: Tourism Regulatory Authority

5.2. Bed Occupancy

Figure 14 presents the total bed-nights occupancy for the period 2020 to 2024. The bed-nights occupancy is estimated to have risen by 16% from 8,632,803 in 2023 to 9,992,721 in 2024. The improvement in the number of bed

occupancy may be attributable to the rise in the number of international visitors arriving and growing domestic tourism activity during the period under review.

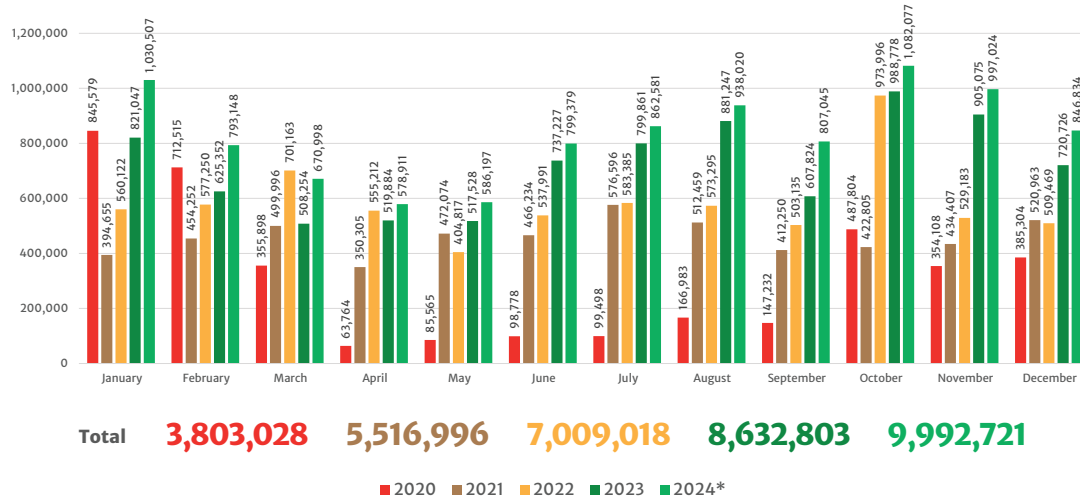


Figure 14: Bed Occupancy, 2020 – 2024

* Provisional

Source: KNBS

5.3. International Bed Occupancy

The data shown in Figure 15 highlights the international visitor bed-nights occupancy from 2020 to 2024. The occupancy by international visitors is estimated to have grown by 20% from 4,014,707 in 2023 to 4,818,755 in 2024. The rise in the

number of international visitors' arrivals during the period under review may have catalysed the improvement in the number of international bed-nights occupancy.

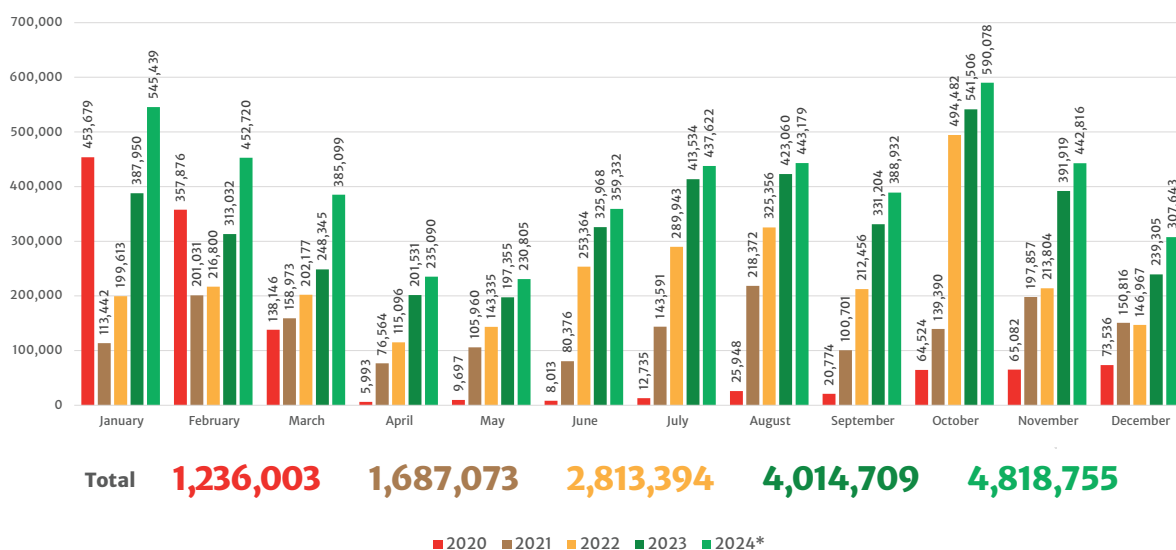


Figure 15: International Bed Occupancy, 2020 – 2024

*Provisional

Source: KNBS

5.4. Domestic Bed Occupancy

Figure 16 illustrates domestic bed-nights occupancy between 2020 and 2024. Domestic bed-nights occupancy is estimated to have grown by 12% from 4,618,094 in 2023 to 5,173,966 in 2024. This rise may have been occasioned by an improved

business environment, domestic travellers, presumably encouraged by factors such as promotional campaigns, or other incentives, and a growing interest of Kenyan citizens to participate in domestic tourism.

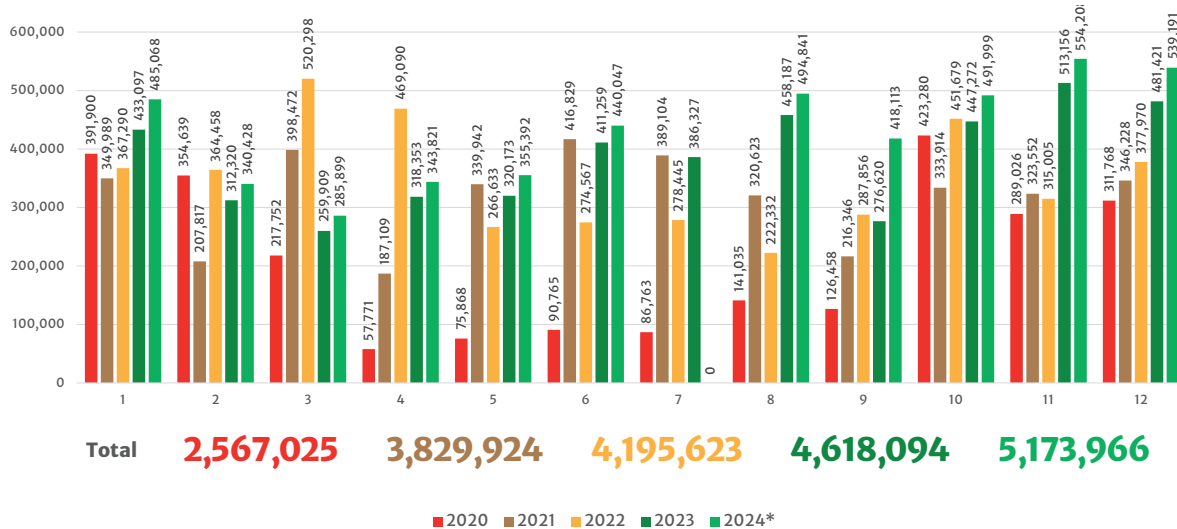


Figure 16: Domestic Bed Occupancy, 2020 - 2024

*Provisional

Source: KNBS

5.5. Room Occupancy

Figure 17 shows room occupancy from 2020 to 2024. Room occupancy is estimated to have risen by 19% from 6,417,531 in 2023 to 7,609,856 in 2024. The expansion in the hospitality sector might have been as a result of an

increase in the number of visitor arrivals and anticipated co-hosting of the African Nations Championship (CHAN) in August 2025.

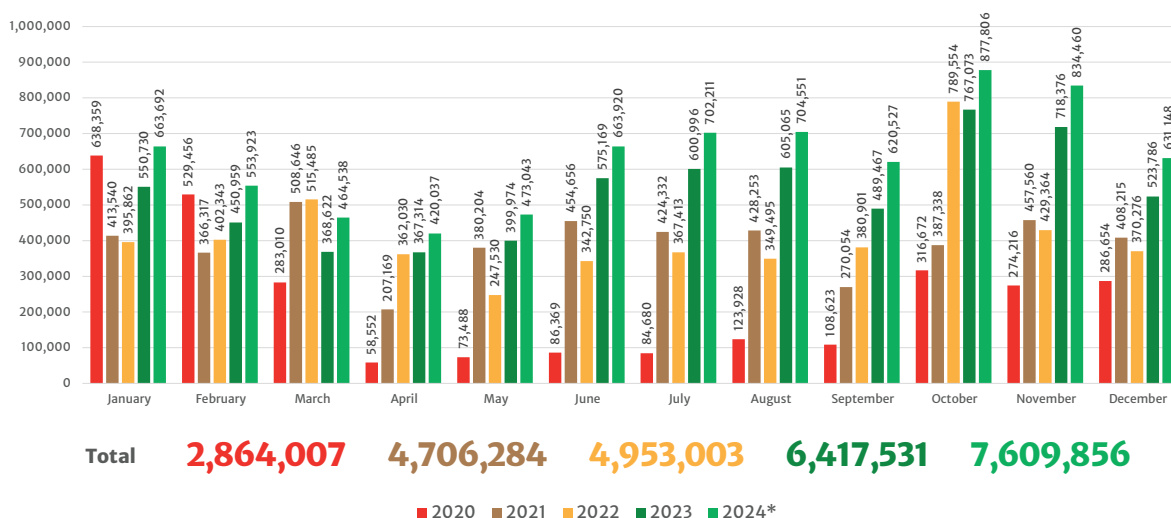


Figure 17: Room Occupancy, 2020 - 2024

*Provisional

Source: KNBS

6

Meetings, Incentives, Conventions And Exhibitions

In the year under review, there was an upward growth in the MICE sub-sector. The international visitors' arrivals on business and conference accounted for 27% (643,595) of the total international tourism arrivals during the period

under review. This was an increase of 12.5% compared to 2023 that accounted for 24% (599,114) of the total inbound tourist arrivals.

6.1. Number of International and local Delegates

The number of international delegates rose to 37,405 in the year 2024 compared to 34,814 recorded in the previous year translating to a growth of 7.4% as shown in Figure 18. There was notable increase in the number of international delegates during the months of May and September 2024 attributed to high profile events. Some of the key meetings during the year were annual meeting for the AFDB Group

Board of Directors, IDA for Africa Heads of State Summit, Extra Requirement for Africa Fertilizer, Soil summit, 2024 United Nation Civil Society conferences, 41st International Association of Science Parks (IASP) World Conference on Science Park and Areas of Innovation (Konza Technopolis) and the 8th Global off-Grid solar Forum and Expo (GOGLA).

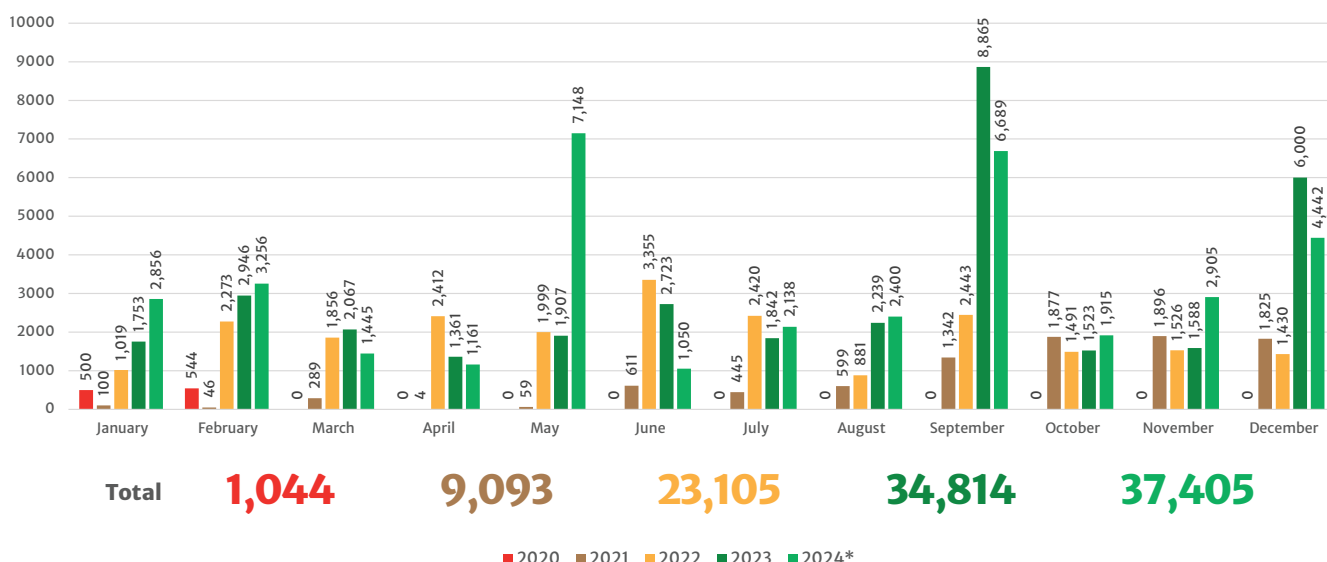


Figure 18: Number of International Delegates, 2020 - 2024

*Provisional

Source: KNBS

The local delegates increased by 3.3% to stand at 699,469 in 2024 compared to 676,910 in 2023 as depicted in Figure

19. This was occasioned to high profile events that took place during the period under review.

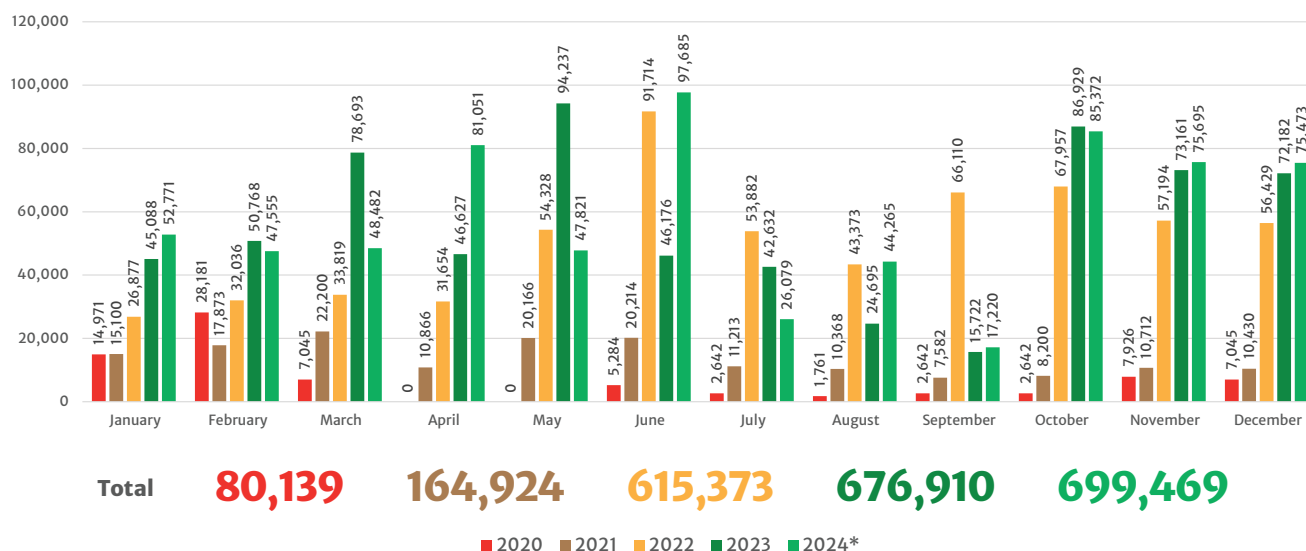


Figure 19: Number of Local Delegates, 2020 – 2024

*Provisional

Source: KNBS

6.2. International Conferences

The number of international conferences held in the country increased from 977 in the year 2023 to 987 in the year 2024 as recorded in Figure 20. This was supported by the increase

in visitors' arrivals and the hosting of high-profile meetings by the government in the effort to boost MICE business.

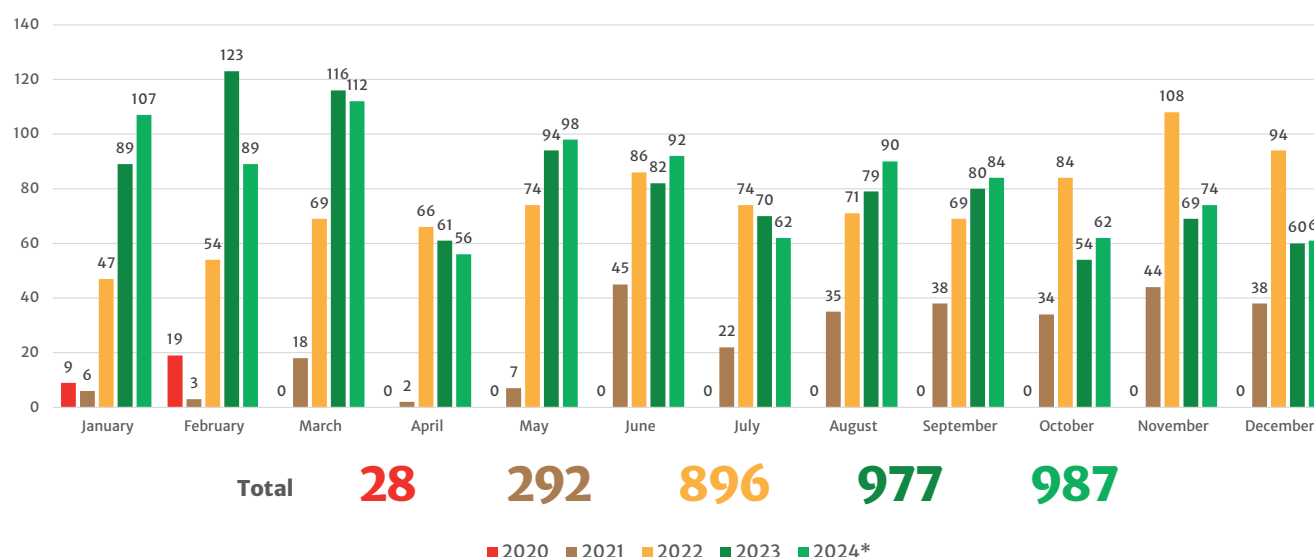


Figure 20: Number of international conferences, 2020 – 2024

*Provisional

Source: KNBS

6.3. Local Conferences

The Figure 21 shows the number of local conferences held in the country rose to 11,225 in 2024 from 10,725 that recorded

in 2023. The increase was attributable to increased hosting of several high-profile local meetings in the country

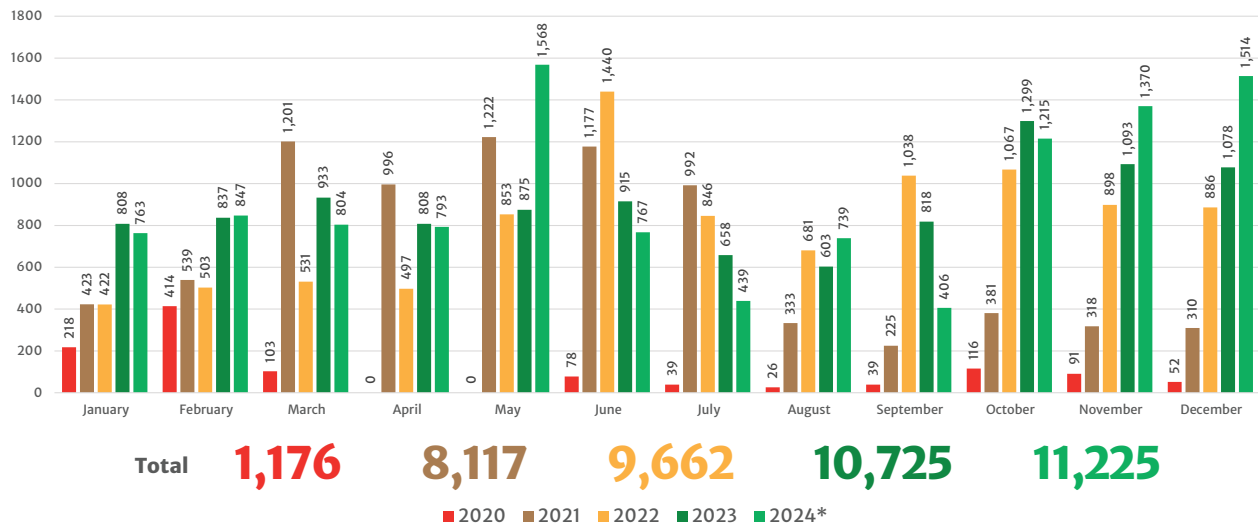


Figure 21: Number of Local Conferences, 2020 – 2024

*Provisional

Source: KNBS



7

Tourism Contribution To Employment

Figure 22 highlights both the impact of external shocks and the resilience of the tourism sector over time. Waged tourism employment fluctuated between 2019 and 2020, reflecting the impact of the COVID-19 pandemic and the sector's subsequent recovery. In 2019, employment stood at 2,928,400 but declined to 2,742,600 in 2020 due to pandemic-related disruptions. The sector rebounded in

2021 with 2,906,100 jobs, surpassing pre-pandemic levels in 2022 at 3,015,400. By 2023, employment had grown to 3,138,300, marking a 7.2% increase from 2019. This trend highlights the industry's resilience and expansion post-pandemic. This is illustrated on figure 22. These jobs only include those from the private sector and public sector wage employment.

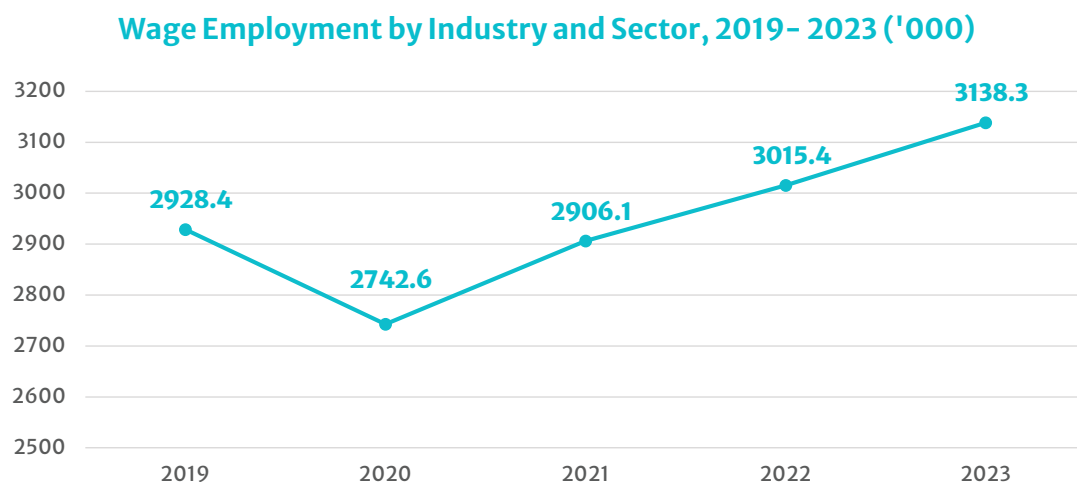


Figure 22: Wage Employment by Industry and Sector, 2019– 2023 ('000)

Source, KNBS



8

Initiatives Supporting Sector Performance In 2024

- **Promotion Efforts:** The promotional initiatives conducted during this period aimed to position Kenya as an all-year-round tourism destination by showcasing a diverse range of unique experiences. These efforts included digital awareness and conversion marketing campaigns, collaborative campaigns with online travel agents, participation in international trade exhibitions, and strategic partnerships with various stakeholders in both the tourism and non-tourism sectors. Collaborative campaigns implemented with international airlines and charter flights were key in driving numbers from source markets.
- **Focus on Sustainability:** The Ministry of Tourism, in collaboration with the Kenya Tourism Board, introduced the “One Tourist, One Tree” initiative aimed at engaging visitors and stakeholders in sustainable

tourism practices through tree-planting activities. This initiative was implemented alongside tourism stakeholders, particularly hotels and tourism agencies.

- **New Airlines:** The launch of AirAsia’s first-ever direct flight connecting Kuala Lumpur to Nairobi was a strategic, with the flight operating four times a week. Brussels Airlines also officially resumed direct flights from Brussels to Nairobi after a decade-long, increasing the number of European flights on the Kenyan route with six weekly flights. Additionally, fly Dubai, the Dubai-based carrier, inaugurated its operations to Mombasa on January 17, starting a four-times-weekly service. This expansion of airlines network in Africa positively impacted on the arrivals to the destination.



9

Tourism Projections And Trends

9.1. Projections

The Forecast was determined using a spreadsheet forecasting tool. The forecasting ranged between the years 2025 to 2028 based on average of between lower limit and Upper limit as indicated below:

The mean weighted tourist expenditure was determined based on the annual average consumer price index of 4.525 for 2024.

Table 9: Projections Based on Average Limit

| Aspects | | Actual | | | | | | Forecast | | | |
|-------------------|----------|-----------------|----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|
| Visitors Arrivals | Duration | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 |
| Total | | 2,048,834 | 567,848 | 870,467 | 1,483,752 | 2,089,259 | 2,394,376 | 2,964,413 | 3,475,783 | 3,987,153 | 4,498,523 |
| Inbound Receipts | Duration | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 |
| Total | | 296,201,000,000 | 88,562,000,000 | 146,514,060,000 | 268,087,278,864 | 377,491,494,638 | 452,196,728,643 | 559,852,677,428 | 656,428,932,157 | 753,005,186,886 | 849,581,441,615 |

Source: TRI

9.2. Global Tourism Outlook in 2025

➔ Sustainability

Sustainability in travel is becoming a dominant trend as awareness of environmental impacts grows. Travellers are increasingly seeking eco-friendly options, leading businesses to adopt green certifications, carbon-neutral accommodations, and community-based tourism initiatives. Digital solutions, such as electronic tickets, further support sustainability efforts while enhancing customer experience.

➔ Wellness:

Wellness tourism is also on the rise, with travellers prioritizing physical and mental well-being. The sector is expanding rapidly, with wellness expenditures projected to grow at an annual rate of 17%. This shift influences tourism offerings, integrating health-focused experiences into travel and hospitality.

➔ Technology

Technology is transforming the tourism industry, enhancing efficiency through smart energy management, digital mapping, and AI-driven customer service. These innovations improve travel experiences while promoting sustainable and data-driven tourism practices.

➔ The Solo Traveler

Solo travel is experiencing significant growth, particularly among younger travellers and digital nomads. The demand for personalized itineraries and budget-friendly options continues to rise, with the solo travel market projected to expand at a CAGR of 9.1% through 2030. Destinations are adapting by offering flexible and safe travel experiences that cater to independent explorers.

9.3. Kenya's Tourism

Factors Likely to Influence Kenya's Tourism Numbers include;

➔ Youth Segment

The growing youth demographic presents a significant opportunity for tourism growth. Young travellers are increasingly seeking adventure, cultural experiences, and digital nomad-friendly destinations. Kenya's ability to cater to their preferences, such as affordable travel options, eco-tourism, and tech-enabled experiences, will shape tourism numbers.

➔ Events and Festivals

Cultural, sports, and entertainment events attract both domestic and international visitors. High-profile events such as the Safari Rally, international marathons, music festivals, and cultural celebrations boost tourism numbers by drawing in large crowds and promoting Kenya as a vibrant destination.

➔ Online Platforms and Digital Influence

The role of digital marketing, social media influencers, and online travel agencies is crucial in shaping perceptions of Kenya as a tourist destination. Enhanced online visibility, real-time reviews, and digital booking platforms will continue to impact the volume of travellers choosing Kenya.

➔ Sustainability

Tourists are becoming more conscious of environmental and social responsibility. Kenya's efforts in conservation, responsible tourism, and community-based tourism initiatives will influence visitor numbers, particularly from markets that prioritize sustainable travel.

➔ Regulation

Government policies, including visa facilitation, taxation, licensing, and compliance with international tourism standards, will directly impact tourism numbers. Investor confidence in the sector also depends on clear and supportive regulatory frameworks.

➔ Connectivity

Air, road, and rail connectivity play a key role in tourism growth. Increased international flights, improved domestic transport infrastructure, and ease of access to key tourist sites will influence the number of visitors choosing Kenya as a destination.

➔ Geo-Politics

Regional and global political stability, security concerns, and diplomatic relations affect tourism flows. Travel advisories, global conflicts, and economic conditions in key source markets can either boost or hinder Kenya's tourism performance.





10

Conclusion And Recommendations

10.1. Conclusion

Kenya's tourism sector demonstrated strong resilience in 2024, with international arrivals increasing by 14.6% and tourism earnings growing by 19.79%. The rise in key source markets, including the United States, Uganda, and Tanzania, alongside a significant boost in cruise tourism and MICE activities, highlights the sector's recovery and diversification. Hospitality also experienced notable growth, with increased bed-night occupancy driven by both domestic and international travellers. Despite challenges such as political uncertainties, business and conference tourism maintained a strong presence, contributing 27% of total arrivals.

Looking ahead, the sector is set for continued transformation in 2025, driven by sustainability, wellness, and technological advancements. Demand for eco-friendly travel is rising, prompting businesses to adopt green practices. Wellness tourism is expanding rapidly, emphasizing holistic experiences, while AI-driven solutions and smart energy management are enhancing efficiency and visitor experiences. To sustain growth, strategic investments in sustainability, infrastructure, and digital innovation will be crucial in maintaining Kenya's competitive edge in global tourism.

10.2. Recommendations

The Tourism Performance Report 2024 highlights the remarkable growth in Kenya's tourism sector, showcasing significant increases in international arrivals, tourism earnings, and key sub-sectors like MICE and cruise tourism. Based on these insights, the following recommendations can help sustain and build upon this growth while positioning Kenya as a leading tourism destination in the future.

First, marketing strategies particularly targeting countries like the United States, China, Poland, Germany, Italy and India which have demonstrated significant growth and high potential to be strengthened.

Second, promoting sustainable tourism practices is more important than ever. With the growing demand for eco-friendly and ethical travel options, Kenya should encourage businesses in the tourism industry to adopt green certifications, carbon-neutral accommodations, and digital solutions. This would cater to the global demand for environmentally conscious travel and support long-term sustainability.

Third, the success of cruise tourism in Kenya calls for investment in expanding the necessary infrastructure.

The sector saw an impressive 163.5% growth in 2024, and continuing to develop port facilities is paramount. Fourth, the MICE sector's rapid growth, particularly with international delegates, offers an opportunity to enhance Kenya's position as a global hub for business events. By developing world-class conference facilities, improving connectivity, and creating tailored event packages, Kenya can attract more high-profile meetings and conferences. Fifth, product diversification is key in increasing the number of tourists in Kenya, this is due to the changing nature of tourist's interests and needs. Kenya needs to keep abreast of tourists' behaviours so as to increase our tourism share vis a viz global international tourists which currently stands at 1.4 billion international tourists. In addition, to increase our tourism offering, niche tourism products need to be well developed and packaged.

Finally, embracing technological innovations will be key to keeping Kenya competitive in the evolving tourism landscape. Investing in AI-driven services, smart energy management, and digital wayfinding will not only enhance visitor experiences but also improve operational efficiency, helping the sector meet the demands of modern travellers.

11

Annex

11.1. Annex One: Forecast for Visitors Arrivals and Inbound Earnings

from 2025–2028

| Average Scenario | | | | | | | | | | | |
|----------------------|-----------|-----------------|----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|
| Aspects | | Actual | | | | | Forecast | | | | |
| Visitors Arrivals | Duration | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 |
| | Quarter 1 | 473,438 | 389,590 | 157,702 | 287,918 | 463,994 | 553,285 | 715,198 | 838,572 | 961,945 | 1,085,319 |
| | Quarter 2 | 452,489 | 745 | 147,933 | 357,478 | 445,494 | 528,803 | 652,496 | 765,053 | 877,610 | 990,168 |
| | Quarter 3 | 589,505 | 40,743 | 265,602 | 440,714 | 620,289 | 688,926 | 842,550 | 987,892 | 1,133,234 | 1,278,577 |
| | Quarter 4 | 533,402 | 136,770 | 299,230 | 454,868 | 559,482 | 623,362 | 754,170 | 884,266 | 1,014,363 | 1,144,459 |
| | Total | 2,048,834 | 567,848 | 870,467 | 1,540,978 | 2,089,259 | 2,394,376 | 2,964,413 | 3,475,783 | 3,987,153 | 4,498,523 |
| Inbound Receipts | Duration | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 |
| | Quarter 1 | 68,445,000,000 | 62,866,000,000 | 27,137,000,000 | 52,021,600,076 | 83,835,363,908 | 104,492,221,358 | 135,070,764,129 | 158,370,913,813 | 181,670,874,639 | 204,971,024,323 |
| | Quarter 2 | 65,416,000,000 | 119,000,000 | 25,456,000,000 | 64,589,839,996 | 80,492,746,908 | 99,868,603,217 | 123,228,998,559 | 144,486,272,765 | 165,743,546,972 | 187,001,010,036 |
| | Quarter 3 | 85,226,000,000 | 6,573,000,000 | 45,704,000,000 | 79,629,086,948 | 112,075,057,098 | 130,109,090,417 | 159,122,190,382 | 186,571,169,546 | 214,020,148,710 | 241,469,316,731 |
| | Quarter 4 | 77,114,000,000 | 19,004,000,000 | 48,217,060,000 | 82,186,459,976 | 101,088,326,724 | 117,726,813,650 | 142,430,932,669 | 167,000,584,892 | 191,570,425,972 | 216,140,078,194 |
| | Total | 296,201,000,000 | 88,562,000,000 | 146,514,060,000 | 278,426,986,996 | 377,491,494,638 | 452,196,728,643 | 559,852,677,428 | 656,428,932,157 | 753,005,186,886 | 849,581,441,615 |
| Lower Limit Scenario | | | | | | | | | | | |
| Aspects | Actual | | Forecast | | | | | | | | |
| Visitors Arrivals | Duration | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 |
| | Quarter 1 | 473,438 | 389,590 | 157,702 | 287,918 | 463,994 | 553,285 | 664,642 | 786,448 | 908,287 | 1,030,158 |
| | Quarter 2 | 452,489 | 745 | 147,933 | 357,478 | 445,494 | 528,803 | 606,372 | 717,499 | 828,657 | 939,843 |
| | Quarter 3 | 589,505 | 40,743 | 265,602 | 440,714 | 620,289 | 688,926 | 782,992 | 926,487 | 1,070,022 | 1,213,593 |
| | Quarter 4 | 533,402 | 136,770 | 299,230 | 454,868 | 559,482 | 623,362 | 700,860 | 829,303 | 957,781 | 1,086,292 |
| | Total | 2,048,834 | 567,848 | 870,467 | 1,540,978 | 2,089,259 | 2,394,376 | 2,754,867 | 3,259,737 | 3,764,747 | 4,269,886 |

| Inbound Receipts | Duration | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 |
|-----------------------------|--------------|------------------------|-----------------------|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|
| | Quarter 1 | 68,445,000,000 | 62,866,000,000 | 27,137,000,000 | 52,021,600,076 | 83,835,363,908 | 104,492,221,358 | 125,522,866,132 | 148,526,886,691 | 171,537,139,559 | 194,553,435,879 |
| | Quarter 2 | 65,416,000,000 | 119,000,000 | 25,456,000,000 | 64,589,839,996 | 80,492,746,908 | 99,868,603,217 | 114,518,118,600 | 135,505,326,066 | 156,498,388,126 | 177,496,738,206 |
| | Quarter 3 | 85,226,000,000 | 6,573,000,000 | 45,704,000,000 | 79,629,086,948 | 112,075,057,098 | 130,109,090,417 | 147,874,193,925 | 174,974,352,621 | 202,082,065,631 | 229,196,577,523 |
| | Quarter 4 | 77,114,000,000 | 19,004,000,000 | 48,217,060,000 | 82,186,459,976 | 101,088,326,724 | 117,726,813,650 | 132,362,920,125 | 156,620,390,304 | 180,884,470,508 | 205,154,783,021 |
| | Total | 296,201,000,000 | 88,562,000,000 | 146,514,060,000 | 278,426,986,996 | 377,491,494,638 | 452,196,728,643 | 520,278,237,557 | 615,626,916,967 | 711,002,087,446 | 806,401,502,055 |
| Upper Limit Scenario | | | | | | | | | | | |
| Aspects | | Actual | | Forecast | | | | | | | |
| Visitors Arrivals | Duration | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 |
| | Quarter 1 | 473,438 | 389,590 | 157,702 | 287,918 | 463,994 | 553,285 | 765,753 | 890,695 | 1,015,603 | 1,140,480 |
| | Quarter 2 | 452,489 | 745 | 147,933 | 357,478 | 445,494 | 528,803 | 698,619 | 812,607 | 926,564 | 1,040,493 |
| | Quarter 3 | 589,505 | 40,743 | 265,602 | 440,714 | 620,289 | 688,926 | 902,107 | 1,049,297 | 1,196,447 | 1,343,560 |
| | Quarter 4 | 533,402 | 136,770 | 299,230 | 454,868 | 559,482 | 623,362 | 807,480 | 939,230 | 1,070,945 | 1,202,627 |
| | Total | 2,048,834 | 567,848 | 870,467 | 1,540,978 | 2,089,259 | 2,394,376 | 3,173,959 | 3,691,829 | 4,209,559 | 4,727,160 |
| Inbound Receipts | Duration | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 |
| | Quarter 1 | 68,445,000,000 | 62,866,000,000 | 27,137,000,000 | 52,021,600,076 | 83,835,363,908 | 104,492,221,358 | 144,618,473,268 | 168,214,752,077 | 191,804,609,719 | 215,388,612,767 |
| | Quarter 2 | 65,416,000,000 | 119,000,000 | 25,456,000,000 | 64,589,839,996 | 80,492,746,908 | 99,868,603,217 | 131,939,689,659 | 153,467,219,464 | 174,988,894,676 | 196,505,281,867 |
| | Quarter 3 | 85,226,000,000 | 6,573,000,000 | 45,704,000,000 | 79,629,086,948 | 112,075,057,098 | 130,109,090,417 | 170,369,997,981 | 198,167,986,471 | 225,958,420,647 | 253,741,867,082 |
| | Quarter 4 | 77,114,000,000 | 19,004,000,000 | 48,217,060,000 | 82,186,459,976 | 101,088,326,724 | 117,726,813,650 | 152,498,945,214 | 177,380,968,337 | 202,256,381,436 | 227,125,562,225 |
| | Total | 296,201,000,000 | 88,562,000,000 | 146,514,060,000 | 278,426,986,996 | 377,491,494,638 | 452,196,728,643 | 599,427,117,298 | 697,230,947,346 | 795,008,286,326 | 892,761,381,175 |

| Aspects | | Visitor Arrivals | | | | | | | | | | | | |
|-----------------|--------------------------|------------------|--------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|-----------|
| | Duration | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Total |
| Actual | 2024 | 201,161 | 195,778 | 180,731 | 154,211 | 170,197 | 202,617 | 226,951 | 249,086 | 204,496 | 200,937 | 183,124 | 225,087 | 2,394,376 |
| Forecast | 2025 Average Limit | 249,052 | 242,387.5065 | 223,758 | 190,925 | 210,716 | 250,855 | 280,982 | 308,387 | 253,181 | 248,775 | 226,721 | 278,674 | 2,964,413 |
| | 2025 Lower Limit | 231,447 | 225,254 | 207,941 | 177,429 | 195,821 | 233,122 | 261,120 | 286,588 | 235,284 | 231,190 | 210,695 | 258,975 | 2,754,867 |
| | 2025 Upper Limit | 266,657 | 259,521.21 | 239,575 | 204,420 | 225,611 | 268,587 | 300,844 | 330,186 | 271,078 | 266,360 | 242,747 | 298,373 | 3,173,959 |











REPUBLIC OF KENYA



**TOURISM
RESEARCH
INSTITUTE**

RESEARCH. INNOVATE. GROW.

