

ANNUAL TOURISM SECTOR PERFORMANCE REPORT 2025



Annual Tourism Sector Performance Report 2025



Content

CHAPTER 1: INTRODUCTION	14
1.0 Introduction	15
1.1 Purpose of the Tourism Performance Report	16
1.2 Global Tourism Performance In 2025	17
1.3 African Regional Tourism Performance 2025	19
1.4 Kenya Tourism Sector Performance Overview 2025	20
CHAPTER 2: INBOUND TOURIST ARRIVALS & MARKET PERFORMANCE	21
2.1 Inbound Tourist Arrivals 2023-2025	22
2.2 Kenyan Diaspora Visitors	22
2.3 Market Performance	25
2.4 Source Markets	25
2.5 Arrival Share by Region	28
2.6 Regional Performance Analysis	30
2.7 Africa	30
2.8 Europe	31
2.9 Americas	31
2.10 Asia	32
2.11 Middle East	32
2.12 Oceania	33
2.13 Most Improved Source Markets	34
2.14 Purposes Of Visit	35
2.15 Arrivals By Region & Purpose of Visit	36
2.16 Top 30 Source Markets by Entry Points,2025	40
2.17 Top Source Markets by Region	42
2.18 Main Purpose of Visit by Top Source Markets	44
2.19 International Market Analysis	46
2.20 East African Community (EAC) Arrivals by Purpose of Visit.	48
2.21 East African Community (EAC) Arrivals by Point of Entry.	49
2.22 Cruise Tourism Performance 2023-2025	50
CHAPTER 3: ECONOMIC CONTRIBUTION	51
3.1 Economic Contribution	52
3.2 Inbound Tourism Earnings	52
3.3 Tourism-Related Tax Revenues	54
CHAPTER 4: ACCOMMODATION PERFORMANCE	55
4.1 Bed Capacity	55
4.2 Bed Occupancy	56
4.3 International Bed Occupancy (2023-2025)	57
4.4 Domestic Bed Occupancy (2023-2025)	60

CHAPTER 5: MEETINGS, INCENTIVES, CONFERENCES & EXHIBITIONS	61
5.1 Number Of International & Local Delegates	64
CHAPTER 6: VISITATION TO NATIONAL PARKS	66
6.1 Tourism Performance in 2025 in Comparison to 2024 KWS Parks, Reserves & National Wildlife Sanctuaries	70
6.2 Highlights Of Major Programmes & Other Related Activities Undertaken in 2025 Which Boosted Visitor Numbers to KWS Parks/Reserves & Sanctuaries	72
6.3 Outlook For 2026	74
CHAPTER 7: INITIATIVES SUPPORTING SECTOR PERFORMANCE IN 2025	76
7.1 Initiatives Supporting Sector Performance In 2025	78
CHAPTER 8: TOURISM PROJECTIONS AND TRENDS	80
8.1 Tourism Projections & Trends	81
8.2 Projections 2026-2030	82
8.3 Major Trends Shaping Global Travel In 2026	83
CHAPTER 9: CONCLUSION & RECOMMENDATIONS	86
9.2 Conclusion	87
9.3 Recommendations	87

List Of Figures

Figure 1: Regional Tourism Growth Rates - 2025	16
Figure 2: International Arrivals,2023-2025	20
Figure 3: Top 30 Source Markets 2025	24
Figure 4: Region Market Share	27
Figure 5: Regional Performance	28
Figure 6: Africa Monthly Arrivals	28
Figure 7: Monthly Europe Arrivals	29
Figure 8: Americas Arrivals	29
Figure 9: Monthly Asia Arrivals	30
Figure 10: Monthly Middle East Arrivals	30
Figure 11: Monthly Oceania Arrivals	31
Figure 12: Purpose of Visit	33
Figure 13: Africa Purpose of Visit	34
Figure 14: Europe Purpose of Visit	34
Figure 15: Americas Purpose of Visit	34
Figure 16: Middle East Purpose of Visit	35
Figure 17: Oceania Purpose of Visit	35
Figure 18: Asia Purpose of Visit	35
Figure 19: Top Source Markets by Region	41
Figure 20: Africa Regional Market Analysis.	42
Figure 21: Cruise Tourism Performance 2023-2025	48
Figure 22: Inbound Tourism Earnings, 2023 -2025	50
Figure 23: Tourism-related Enterprises CIT Performance	51
Figure 24: Domestic VAT Performance	51
Figure 25: Bed Capacity per County	53
Figure 26: Total Monthly Bed Occupancy	54
Figure 27: Domestic Monthly Bed Occupancy	55
Figure 28: Monthly international Bed Occupancy	56
Figure 29: Number of International Delegates, 2023 - 2025	59
Figure 30: Number of International Conferences, 2023 - 2025	60
Figure 31: Number of local Delegates, 2023 - 2025	60
Figure 32: Number of Local Conferences, 2023 - 2025	61
Figure 33: Domestic Visitors (Citizens & Residents)	68
Figure 34: International Visitors (Non-Residents)	69
Figure 35: Total Visitors	69
Figure 36: Total Visitors Monthly Trend 2025 vs 2024 & 2019	72

List of Tables

Table 1: International Tourist Arrivals by World Region (2025)	17
Table 2: Monthly Arrivals by Region	26
Table 3: Most Improved Source Markets	32
Table 4: Arrivals By Region & Purpose of Visit	36
Table 5: Top 30 Source Markets by Entry Point	39
Table 6: E.A.C Purpose of Visit	46
Table 7: E.A.C Arrivals by Border Points	47
Table 8: Visitor Numbers to KWS Parks and Reserves in 2025 per visitor category	64
Table 9: Visitor Numbers to KWS Parks and Reserves in 2025 per Month	66
Table 10: Projections 2026-2030	80



Abbreviations and Acronyms

Acronym	Meaning
BETA	Bottom-Up Economic Transformation Agenda
CBK	Central Bank of Kenya
DIS	Directorate of Immigration Services
eTA	Electronic Travel Authorisation
JKIA	Jomo Kenyatta International Airport
CAA	Kenya Airports Authority
KICC	Kenya International Convention Centre
KNBS	Kenya National Bureau of Statistics
KSh	Kenya Shilling
KTB	Kenya Tourism Board
KWS	Kenya Wildlife Service
MIA	Moi International Airport
MICE	Meetings, Incentives, Conferences and Exhibitions
TRA	Tourism Regulatory Authority
TRI	Tourism Research Institute
UN Tourism	United Nations Tourism
VFR	Visiting Friends and Relatives

Glossary

Term	Definition
Accommodation Performance	Measurement of hotel and lodging occupancy, room usage and bed capacity.
Air Connectivity	Availability and frequency of air transport routes linking destinations.
Arrivals	Number of international visitors entering Kenya during a specified period.
Aviation Traffic	Passenger movement through airports and air transport systems.
Bed Occupancy Rate	Percentage of occupied beds in accommodation facilities.
Charter Flights	Flights arranged specifically for tourism groups.
Diaspora Tourism	Travel by Kenyans living abroad returning home.
Domestic Tourism	Travel by residents within their own country.
Foreign Exchange Earnings	Income earned from international visitor spending.
Hospitality Industry	Businesses providing accommodation, food, beverage and tourism services.
Inbound Tourism	Travel by non-residents entering Kenya.
International Tourist Arrivals	Total foreign visitors entering the country.
Leisure Tourism	Travel primarily for holidays and recreation.
Long-haul Market	Tourist markets originating from distant regions.
Occupancy Rate	Percentage of available rooms or beds occupied.
Product Diversification	Expansion of tourism offerings beyond traditional products.
Regional Tourism	Tourism activities occurring within neighboring countries or regions.
Resilience	Ability of the tourism sector to recover from disruptions.
Source Market	Country or region from which tourists originate.
Sustainable Tourism	Tourism balancing economic, environmental and social objectives.
Tourism Earnings	Revenue generated from tourism activities.
Tourism Receipts	Income earned from international tourists during their stay.
Tourism Sector	Industries and services related to tourism.
Visitor Flow	Movement and volume of tourists into and within destinations.



Foreword

HON. REBECCA MIANO, EGH
CABINET SECRETARY
MINISTRY OF TOURISM AND WILDLIFE

“
Kenya
continues
to maintain
its global
reputation as
a destination
offering
unique and
diverse tourism
experiences.
”

The tourism sector remains one of Kenya’s most vital economic pillars, contributing significantly to foreign exchange earnings, employment creation, investment growth, and socio-cultural development. I am pleased to present the Tourism Sector Performance Report 2025, which provides a comprehensive assessment of the sector’s performance, key achievements, emerging trends, and future outlook.

The year 2025 marked continued recovery and consolidation of Kenya’s tourism sector, with international arrivals, tourism earnings, accommodation performance, and aviation traffic registering notable growth. These achievements reflect the success of deliberate policy reforms, enhanced destination marketing, improved air connectivity, product diversification, and strong collaboration between the Government, private sector, and development partners. The introduction of the Electronic Travel Authorization (eTA) system and the expansion of global and regional air routes have further strengthened Kenya’s competitiveness as a preferred tourism destination.

Kenya continues to maintain its global reputation as a destination offering unique and diverse tourism experiences, including world-class wildlife safaris, pristine coastal attractions, cultural heritage, conference tourism, and emerging niche tourism segments. The growth recorded in regional and emerging source markets further demonstrates Kenya’s strategic position as both a regional hub and an internationally competitive destination.

Despite these positive developments, the sector continues to face emerging challenges such as climate change, shifting global travel patterns, infrastructure pressures, skills gaps, and increasing global competition. The Government remains committed to implementing progressive policies and strategic interventions aimed at enhancing sustainability, improving tourism infrastructure, strengthening digital transformation, and promoting product and market diversification in line with the Bottom-Up Economic Transformation Agenda (BETA).

I commend the Tourism Research Institute and all sector stakeholders for their dedication in generating timely, reliable, and evidence-based data that informs policy and strategic decision-making. The insights provided in this report will guide the Ministry in strengthening sector resilience, enhancing investment planning, and promoting sustainable tourism development.

As we look ahead, the Government remains committed to positioning Kenya as a leading tourism destination globally while ensuring that tourism growth translates into inclusive economic benefits for communities across the country.

HON. REBECCA MIANO, EGH
CABINET SECRETARY
MINISTRY OF TOURISM AND WILDLIFE



Preface

HON. JOHN OLOLTUAA, CBS
PRINCIPAL SECRETARY,
STATE DEPARTMENT FOR TOURISM

“

In 2025,
Kenya's
tourism sector
demonstrated
sustained
growth and
resilience.

”

The Tourism Sector Performance Report 2025 provides an in-depth analysis of Kenya's tourism performance, highlighting key sector indicators, emerging trends, and strategic insights that support policy formulation, planning, and investment decision-making. The report is a critical monitoring tool that tracks the sector's progress in line with national tourism priorities and global industry developments.

In 2025, Kenya's tourism sector demonstrated sustained growth and resilience, evidenced by increased international arrivals, improved tourism earnings, expansion in accommodation performance, growth in aviation traffic, and continued strengthening of Meetings, Incentives, Conferences and Exhibitions (MICE) activities. The sector's performance reflects the impact of strategic marketing initiatives, improved accessibility and connectivity, digital facilitation measures, and strengthened public-private partnerships.

The State Department for Tourism continues to prioritize diversification of tourism products and source markets, enhancement of destination competitiveness, strengthening of tourism infrastructure, and promotion of sustainable and responsible tourism practices. Special focus has been placed on expanding domestic and regional tourism, leveraging digital technologies, strengthening tourism research and data analytics, and supporting workforce development to meet evolving industry demands.

The findings and recommendations contained in this report will guide policy direction, resource mobilization, and implementation of strategic interventions aimed at enhancing sector competitiveness and ensuring tourism contributes effectively to national economic development. The State Department remains committed to strengthening collaboration with sector agencies, county governments, private sector players, and development partners to sustain growth and build a resilient tourism industry.

I commend the Tourism Research Institute and all stakeholders who contributed to the preparation of this report. Their dedication to providing credible and timely tourism data continues to strengthen evidence-based planning and policy development within the sector.

HON. JOHN OLOLTUAA, CBS
PRINCIPAL SECRETARY
STATE DEPARTMENT FOR TOURISM



Acknowledgement

HESBON OYENDO
AG. CHIEF EXECUTIVE OFFICER
TOURISM RESEARCH INSTITUTE



The Tourism Research Institute remains committed to strengthening tourism research, data analytics, and knowledge management.



The preparation of the Tourism Sector Performance Report 2025 was made possible through the collective efforts, collaboration, and commitment of various institutions and stakeholders within the tourism sector. The Tourism Research Institute (TRI) expresses its sincere appreciation to the Ministry of Tourism and Wildlife and the State Department for Tourism for their strategic guidance and continued support in strengthening tourism research and performance monitoring.

We acknowledge the invaluable data and technical contributions provided by key sector agencies including the Directorate of Immigration Services, Kenya National Bureau of Statistics (KNBS), Kenya Tourism Board (KTB), Kenya Wildlife Service (KWS), Kenya Airports Authority (KAA), Kenya Revenue Authority, Kenya National Museums, and other public and private sector stakeholders whose data inputs enriched the report.

Special appreciation is extended to tourism industry players, government agencies, and research collaborators who continuously support tourism data collection, validation, and dissemination efforts. Their cooperation has been instrumental in ensuring the accuracy, reliability, and comprehensiveness of this report.

I also wish to commend the technical team at the Tourism Research Institute whose dedication, professionalism, and analytical expertise made the preparation of this report possible. Their commitment to providing timely, credible, and evidence-based tourism intelligence continues to support informed decision-making and strategic planning within the sector.

The Tourism Research Institute remains committed to strengthening tourism research, data analytics, and knowledge management to support sustainable tourism development and enhance Kenya's competitiveness in the global tourism landscape.

HESBON OYENDO
AG. CHIEF EXECUTIVE OFFICER
TOURISM RESEARCH INSTITUTE

Executive Summary

Global tourism recorded strong recovery in 2025, with international arrivals reaching 1.52 billion, representing a 4% growth from 2024 and surpassing pre-pandemic levels. Growth was driven by strong travel demand, improved air connectivity, visa facilitation, and solid performance across major regions, with Europe remaining the leading destination and Africa recording notable growth.

Despite this positive performance, global tourism continues to face challenges including geopolitical tensions, climate change, labour shortages, and infrastructure gaps, underscoring the need for sustainable and resilient tourism development strategies.

Kenya's tourism sector recorded sustained growth in 2025, demonstrating strong recovery and transition into a phase of consolidation and expansion. International tourist arrivals increased to 2,652,540 arrivals compared to 2,474,551 in 2024 representing a 7.2% increase; reflecting continued global travel recovery, improved accessibility, enhanced marketing efforts, and product diversification initiatives. Tourism earnings grew significantly by 10.55 % to KSh 501.34 billion, reinforcing the sector's critical role in foreign exchange generation and economic development.

Regional markets, particularly Africa, remained the largest contributor to arrivals, accounting for 37.59% of total visitors, while Europe and the Americas continued to provide strong long-haul leisure demand. The United States retained its position as Kenya's leading source market, followed by Uganda, Tanzania, and the United Kingdom, highlighting the importance of both regional and international travel flows. Holiday and leisure travel remained the primary Purpose of Visit, although business, conference, and Visiting Friends and Relatives (VFR) segments continued to make significant contributions to visitor arrivals.

Accommodation performance improved, with bed occupancy and room occupancy recording notable growth, reflecting increased demand in both domestic and international tourism markets. The Meetings, Incentives, Conferences and Exhibitions (MICE) segment also registered positive growth, with increased international and local conference activities strengthening Kenya's position as a business tourism destination.

Strategic government interventions, including the introduction of the Electronic Travel Authorisation (eTA), expanded air connectivity, targeted marketing campaigns, tourism product diversification, and infrastructure development, significantly contributed to sector performance. Additionally, increased focus on domestic tourism, regional market expansion, and niche tourism segments supported sector resilience and diversification.

Despite the positive performance, the sector continues to face emerging challenges, including seasonality, climate change risks, infrastructure concentration in major tourism hubs, skills gaps, and increasing global competition. To address these challenges, the report recommends strengthening market and product diversification, enhancing connectivity and accessibility, promoting year-round tourism, leveraging digital innovation, strengthening MICE competitiveness, and expanding international research collaboration to support evidence-based policy development.

Overall, Kenya's tourism sector outlook remains positive, with projections indicating steady growth in visitor arrivals and tourism earnings through 2030, supported by improved connectivity, investment expansion, policy reforms, and emerging global travel opportunities.





01 | CHAPTER ONE

INTRODUCTION

1.0 Introduction

Tourism is a vital contributor to national economies, generating employment, foreign exchange earnings, and investment opportunities. Given its wide-ranging economic and social impact, the sector requires continuous and systematic monitoring to ensure that policies, operations, and development remain aligned with evolving market trends, national priorities, and stakeholder needs.

The 2025 Tourism Performance Report serves as a structured and evidence-based tool for monitoring Kenya's tourism sector, providing timely insights into visitor flows, tourism earnings, and overall sector performance.

Monitoring tourism performance is essential for informed decision-making. It provides the empirical evidence required to design and refine effective tourism policies, support operational and strategic planning by government agencies and the private sector, and enhance stakeholder engagement through transparent and credible reporting.

Reliable performance data further strengthens the sector's resilience to external shocks and disruptions, while ensuring accountability by tracking progress against national tourism strategies and development objectives.

The 2025 Tourism Performance Report Serves As A Structured And Evidence-Based Tool For Monitoring Kenya's Tourism Sector, Providing Timely Insights Into Visitor Flows, Tourism Earnings, And Overall Sector Performance.



1.1 Purpose of the Tourism Performance Report

The purpose of the 2025 Tourism Performance Report is to support the implementation and monitoring of Kenya's national tourism strategies by providing timely, reliable, and evidence-based information on the performance of the tourism sector.

The report serves as a key reference for government, industry stakeholders, and development partners in guiding policy, planning, and investment decisions. Specifically, the report aims to:



Gauge Sector Performance

Assess trends in visitor arrivals, tourism earnings, market performance, and regional distribution in line with national tourism targets.



Identify Challenges and Constraints

Highlight structural, operational, and external factors affecting tourism growth, competitiveness, and sustainability.



Inform Policy and Strategic Planning

Provide empirical evidence to guide policy formulation, review, and implementation at national and county levels.



Inform Stakeholders on Emerging and New Trends

Analyze evolving visitor behaviour, source markets, product demand, and tourism patterns to support innovation, product diversification, and market responsiveness.



Enhance Sector Resilience and Crisis Preparedness

Monitor the sector's performance in response to external shocks and recovery trends to inform adaptive and risk-mitigation strategies.



Promote Accountability and Performance Monitoring

Measure progress against national tourism strategies, action plans, and performance benchmarks through transparent reporting.



Guide Investment and Product Development

Identify growth areas and investment opportunities aligned with national tourism development priorities.



1.2 Global Tourism Performance In 2025

According to UN Tourism Barometer January 2026, an estimate of 1.52 billion International tourist arrivals (overnight visitors) were recorded globally in 2025, about 60 million more tourists than in 2024, that is a growth of 4% and 3% above the pre-pandemic year 2019.

Results were driven by strong demand, robust performance from large source markets and the ongoing recovery of destinations in Asia and the Pacific. Increased air connectivity and enhanced visa facilitation also supported international travel in 2025.

Europe recorded 793 million international tourists in 2025 remaining the world's largest destination region with an increase of 4% from 2024 and 6% more than in 2019. Western Europe (+5%) and Southern Mediterranean Europe (+3%) saw robust performance. Central and Eastern Europe

rebounded strongly (+6%) though arrivals remained 9% below 2019 levels.

Americas recorded 1% growth in 2025 with 218 million tourists with mixed results across sub regions. After a strong half of 2025, the region saw small declines in Q3 and Q4, partly due to weak results in the United States.

The Middle East recorded 3% growth in 2025, which is equivalent to 39% above pre-pandemic levels, the strongest results relative to 2019. The region virtually reached the mark of 100 million international visitors in 2025.

Arrivals in Asia and the Pacific grew 6% (331 million) in 2025 but are still 9% below 2019 levels as the region continued to rebound. North-Eastern Asia led performance with 13% growth over 2024, while South Asia recovered pre-pandemic levels.

In Africa region there was an increase of 8% (81 million tourists) arrivals in 2025, with particularly strong results in North Africa (+11%). Some of the growth drivers for 2025 included evolving traveller profiles, growing segments and technology development as an enabler for travel.

The major constraints to global tourism growth in 2025 include geopolitical tensions, climate change, and demographic shifts, underscoring the need to increase resilience within the Tourism sector. Other constraints include growing pressure on nature, labour and skills crisis, and Infrastructure and Investments.

Global Tourism Performance



1.52 Billion
International
Tourist Arrivals
In 2025



60 Million
more tourists
than 2024



+4% Growth
from 2024



+3% Above
2019 levels

Best Performing Regions

Europe
793 million arrivals
(largest region)

Africa
81 million arrivals
(+8%)

Asia & Pacific
331 million arrivals
(+6%)

Americas
218 million arrivals
(+1%)

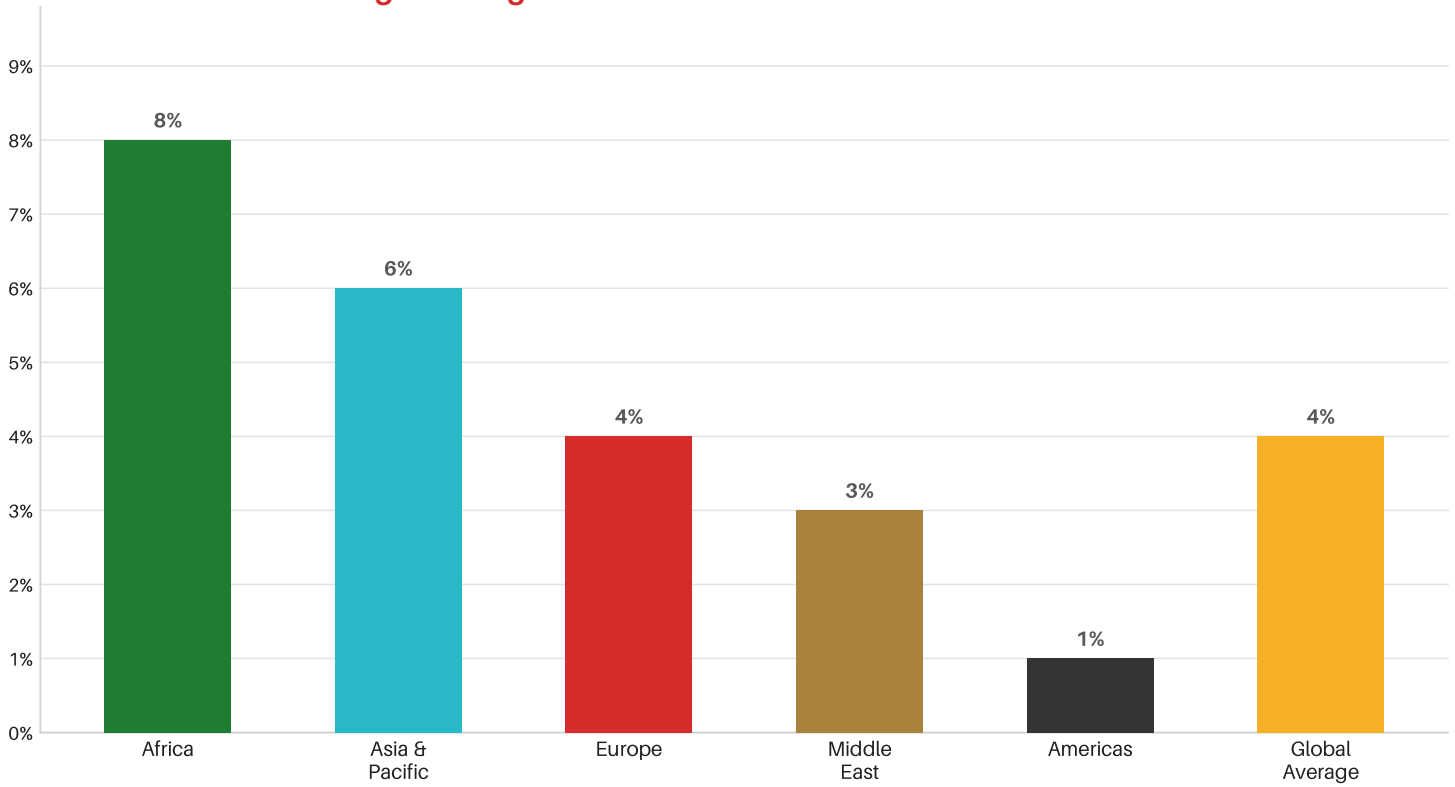
Middle East
Nearly 100 million
arrivals (+3%)

Global Tourism
Grew Strongly In
2025, Supported
By Demand,
Connectivity, and
Recovery Across
Regions.



Photo by Kenya Airways

Figure 1: Regional Tourism Growth Rates - 2025



UN Tourism estimates



Table 1: International Tourist Arrivals by World Region (2025)



Region	International Tourist Arrivals (Million)	Share of Global (%)
Europe	793	52.2
Asia & Pacific	331	21.8
Americas	218	14.3
Middle East	100	6.6
Africa	81	5.3
World Total	1,520	100

Source: 2026 UN Tourism Barometer.

1.3 African Regional Tourism Performance 2025

In the year 2025, Africa emerged as the world's fastest-growing tourism region, according to the United Nations World Tourism Barometer January 2026. International tourist arrivals in Africa increased by approximately 8% in 2025 compared to 2024, reaching an estimated 81 million visitors.

This growth rate was twice the global average of around 4%, highlighting the continent's strong post-pandemic recovery and rising competitiveness in the international tourism market.

Among Africa's sub-regions, North Africa led the growth, registering an increase of approximately 11% in international arrivals, driving strong performance in countries such as Egypt and Morocco with a growth of 20% and 14%, respectively. Sub-Saharan Africa also achieved robust growth, with arrivals rising by an estimated 7%, supported by key destinations including South Africa, Kenya, Ethiopia, and Island markets like Seychelles.

Africa led global tourism growth in 2025 by **8%** Against global growth **4%**

1.4 Kenya Tourism Sector Performance Overview 2025

This section provides a comprehensive overview of the performance of Kenya's tourism sector in 2025, highlighting key indicators that reflect sector growth.

It presents an analysis of inbound tourist arrivals, source market performance, tourism earnings, and accommodation trends, which collectively demonstrate demand dynamics and industry capacity.

The section further examines the performance of the Meetings, Incentives, Conferences, and Exhibitions (MICE) segment for both local and international events and visitation patterns in National Parks. Additionally, it outlines sector projections for the period 2025–2030 to provide insights into expected trends, opportunities, and strategic planning priorities for sustainable tourism development.

2025 Tourism Performance Overview



Arrivals



Earnings



Source Markets



Accommodation trends





02 | CHAPTER TWO

INBOUND TOURIST ARRIVALS AND MARKET PERFORMANCE

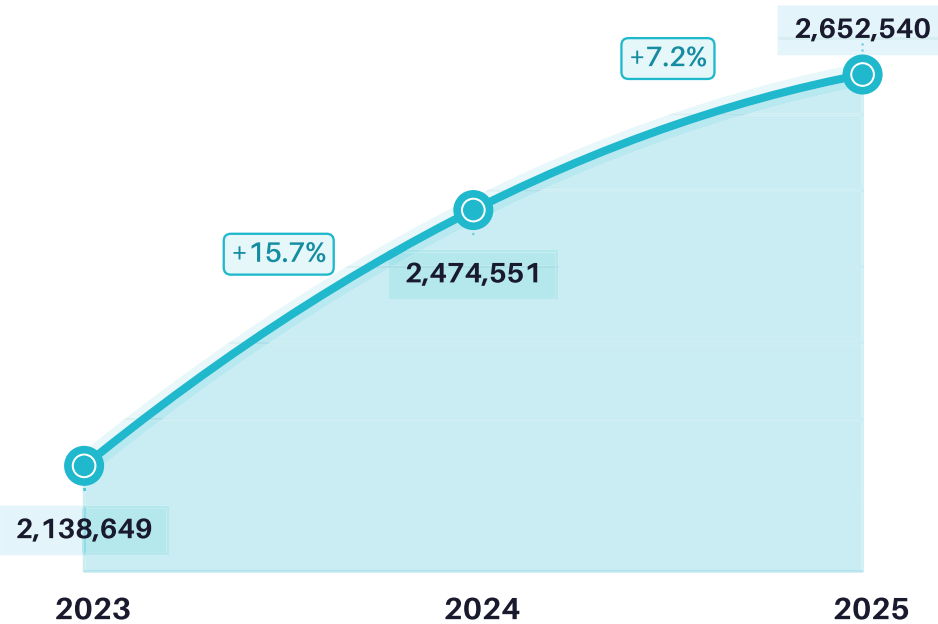
2.1. Inbound Tourist Arrivals 2023-2025

In 2025, Kenya experienced a notable increase in international tourist arrivals, recording 2,652,540 arrivals compared to 2,474,551 in 2024 representing a 7.2% increase.

These numbers include Kenyan diaspora including 250,603 Kenyan diaspora arrivals in 2025 and 221,063 arrivals in 2024. Tourist arrivals have shown a consistent

upward trajectory from 2023 to 2025, reflecting a robust growth in the sector. In 2023 there were 2,138,649 arrivals.

Figure 2: International Arrivals, 2023-2025



Source: Directorate of Immigration services

2023 & 2024 | Revised 2025 | Provisional

2.2 Kenyan Diaspora Visitors

In 2025, Kenya recorded 250,603 diaspora arrivals as compared to 2024 where arrivals were 221,063. This is a crucial segment in driving tourism arrivals due to its consistency, economic impact, and strong cultural ties to the country.

Unlike international leisure tourists whose travel patterns are often influenced by global trends, diaspora travellers visit regularly, particularly during peak holiday periods such as Christmas and Easter, making their contribution more predictable and stable.

Their visits are typically longer and involve higher levels of local spending on housing, food, transport, and community activities, thereby distributing tourism income more widely across local economies.

Additionally, much of diaspora travel falls under visiting friends

and relatives (VFR), which, while sometimes underrepresented in formal tourism statistics, significantly supports domestic travel and small-scale enterprises.

Beyond direct spending, diaspora communities contribute to tourism through repeat visits, investment in hospitality and related sectors, and by acting as informal ambassadors who promote Kenya as a destination through personal networks and social media.

Their resilience during global downturns further underscores their importance, as they tend to maintain travel even when international arrivals decline. Overall, the diaspora represents a reliable and high-value market segment that supports sustainable tourism growth and development.

“
Reliable, high-value segment driving resilient and sustainable tourism.

”

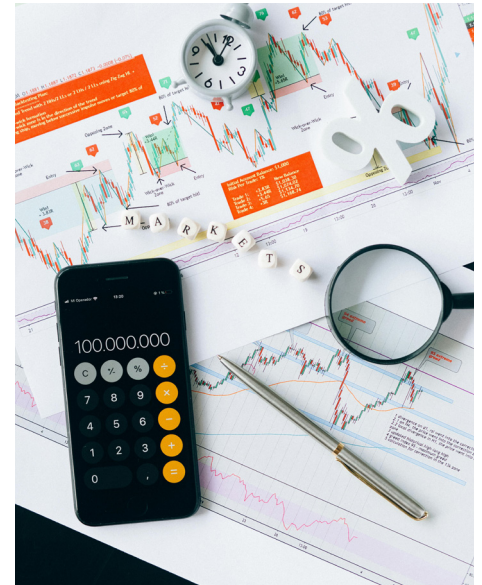
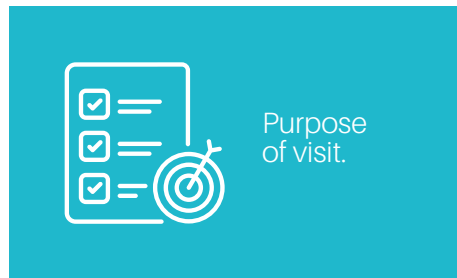
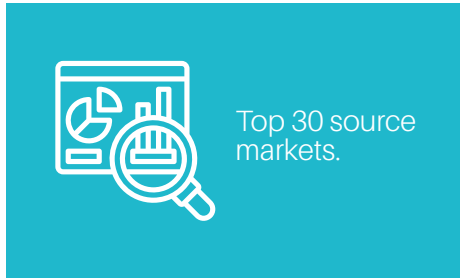


Departures 08:09		Departures 08:09		Departures 08:09		Connections	
11:11 Frankfurt	14:00	11:11 Frankfurt	14:00	11:11 Frankfurt	14:00	Check the flight information screens regularly	
11:11 Frankfurt	14:00	11:11 Frankfurt	14:00	11:11 Frankfurt	14:00	Local time is 08:09	
11:11 Frankfurt	14:00	11:11 Frankfurt	14:00	11:11 Frankfurt	14:00	You are now at gates B	
11:11 Frankfurt	14:00	11:11 Frankfurt	14:00	11:11 Frankfurt	14:00	Follow Connections to:	
11:11 Frankfurt	14:00	11:11 Frankfurt	14:00	11:11 Frankfurt	14:00	Estimated walking time	
11:11 Frankfurt	14:00	11:11 Frankfurt	14:00	11:11 Frankfurt	14:00	A 13-20 min	
11:11 Frankfurt	14:00	11:11 Frankfurt	14:00	11:11 Frankfurt	14:00	B 1-4 min	
11:11 Frankfurt	14:00	11:11 Frankfurt	14:00	11:11 Frankfurt	14:00	T 2-12 min	
11:11 Frankfurt	14:00	11:11 Frankfurt	14:00	11:11 Frankfurt	14:00	Welcome to Brussels Airport	



2.3 Market Performance

This chapter outlines tourism performance by focusing on the following;



2.4 Source Markets

In 2025, Kenya recorded strong growth from both traditional and emerging source markets, reflecting continued recovery in international tourism. The United States of America remained the leading source market with 304,491 arrivals accounting for 11.5% of total arrivals. Most arrivals from the United States of America entered through Jomo Kenyatta International Airport (JKIA), highlighting the importance of direct long-haul connectivity and Nairobi's role as the main international gateway, while additional arrivals through Malindi and Mombasa International Airport (MIA) underscored the strong appeal of Kenya's coastal tourism to the North American market. Uganda ranked second among Kenya's source markets in 2025

with 234,552 arrivals, accounting for 8.8% of total arrivals, while Tanzania followed with 209,531 accounting for 8% of the total arrivals.

The strong performance of Uganda reaffirmed its position as Kenya's leading regional source market, with a significant proportion of arrivals recorded through Busia, Malaba, Lwakhakha, and Suam, highlighting the critical role of land border points in facilitating intra-regional travel.

The United Kingdom remained a key long-haul source market with 170,936 arrivals, most of whom entered through JKIA and MIA, reflecting strong air connectivity and continued demand for safari and coastal tourism. India also performed strongly, recording

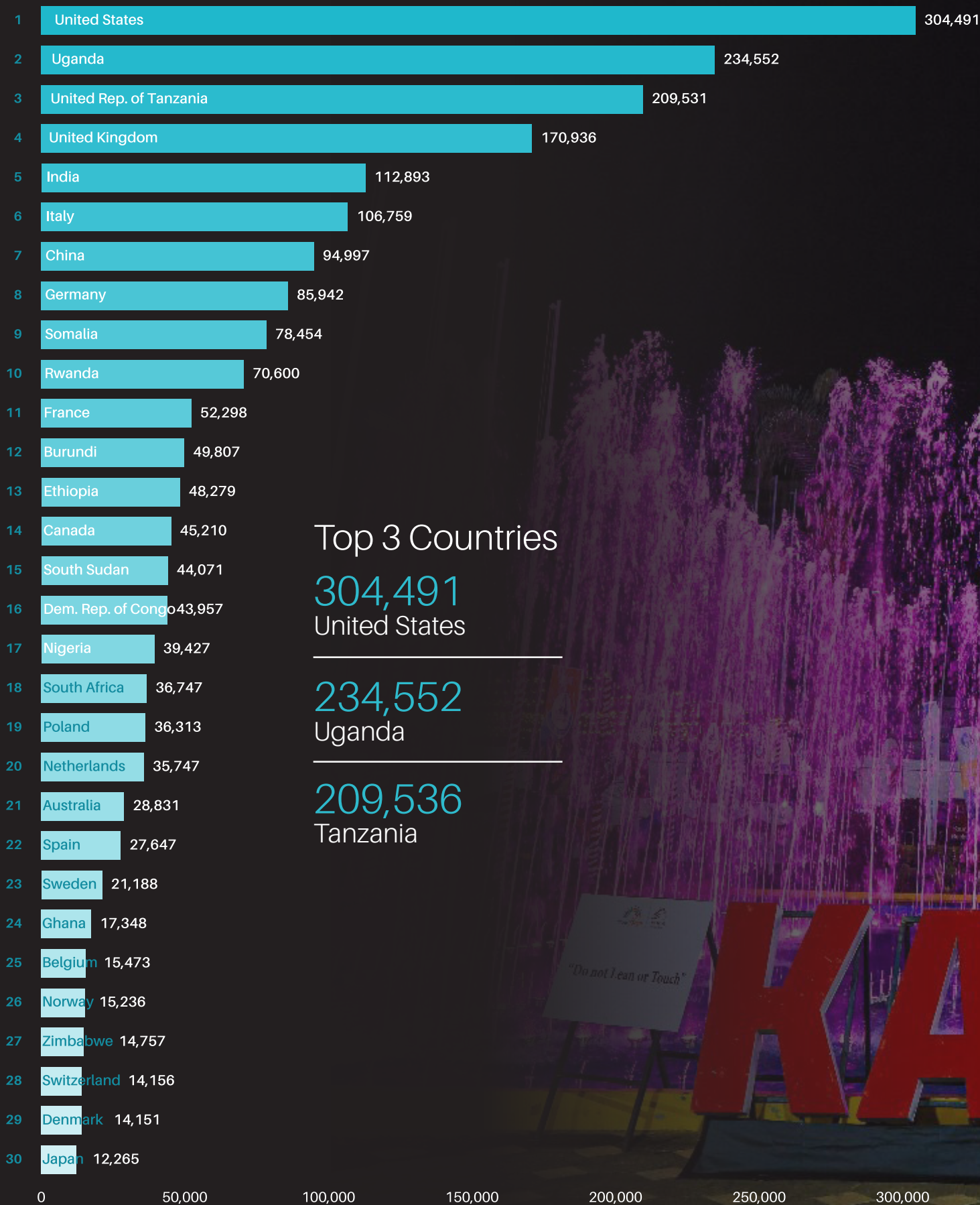
112,893 arrivals mainly via JKIA, supported by expanding business links, diaspora travel, and growing leisure interest.

European markets posted solid results, led by Italy, Germany, and France, with coastal airports in Mombasa and Malindi playing a notable role, particularly for Italian visitors.

This highlights the continued importance of charter and leisure-focused flights in sustaining coastal tourism. China's 94,997 arrivals reflected steady growth driven by improved air connectivity, targeted promotion, and rising leisure and business travel.



Figure 3: Top 30 Source Markets 2025



Top 3 Countries

304,491
United States

234,552
Uganda

209,536
Tanzania



RIBU



2.5 Arrival Share by Region

In 2025, Kenya recorded a total of 2,652,540 international arrivals including Kenyan diaspora representing 250,603, with clear seasonal fluctuations and strong regional contributions shaping overall performance.

Arrivals started high in January (199,578), declined through March and April, and then steadily increased from May, peaking in

August (261,557) and remaining strong in July (244,537), before dipping slightly in September and October and rising again in December (228,348) due to festive travel and diaspora visits. Regionally, Africa dominated with 997,188 arrivals (37.59%), followed by Europe with 678,419 (25.58%), both showing strong peaks in August and December, underscoring their importance as core markets.

The Americas (14.01%) and Asia (10.65%) contributed moderate but steady flows, particularly during mid-year, while the Middle East, Oceania, and Unclassified categories accounted for a small share of arrivals. Overall, the data highlights the continued reliance on regional and traditional long-haul markets, alongside pronounced seasonality driven by global travel patterns.

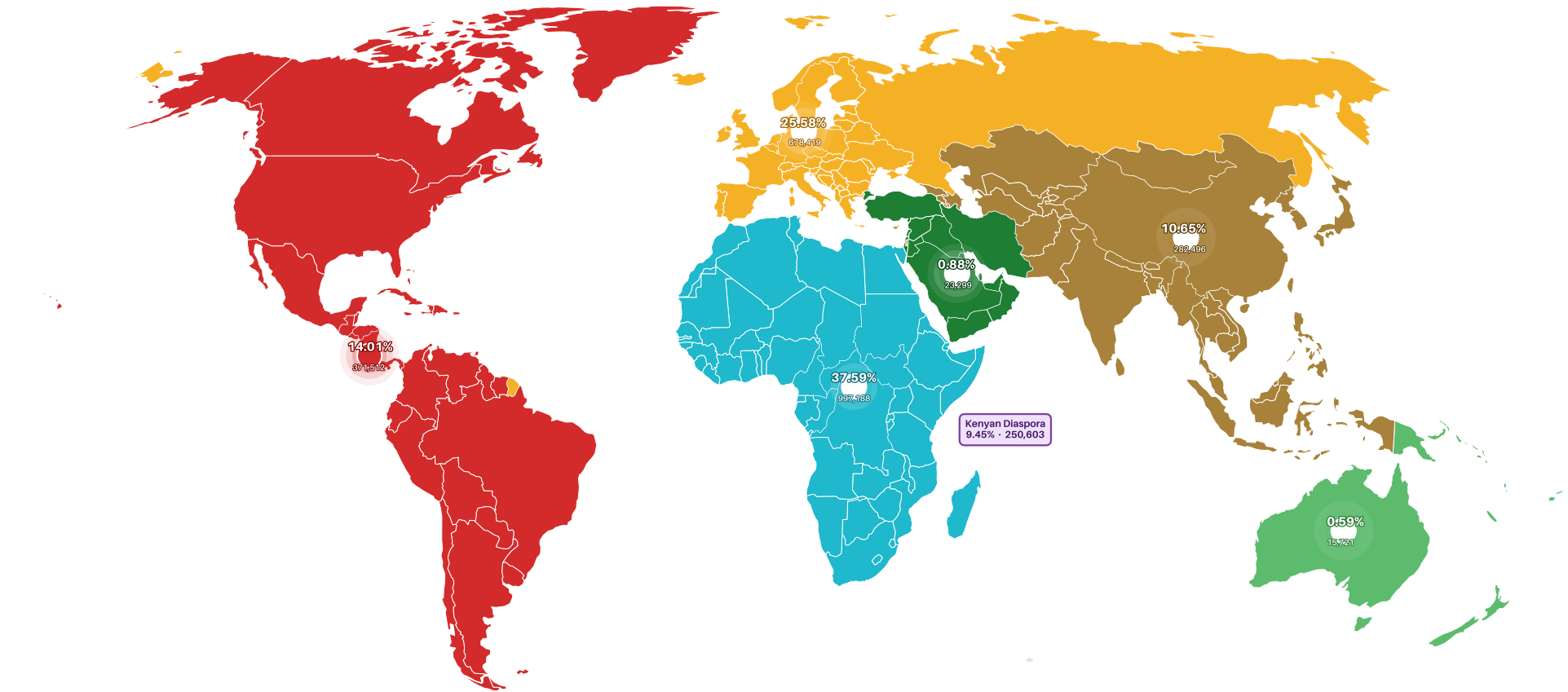
Table 2: Monthly Arrivals by Region

Region	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Africa	82,233	69,737	67,447	79,251	79,317	78,847	82,362	99,995	83,365	86,240	87,390	101,004	997,188
Americas	27,818	28,350	23,111	19,486	26,335	44,770	47,890	39,984	31,039	27,979	23,974	30,776	371,512
Asia	19,634	17,508	17,094	16,727	20,897	28,641	36,584	39,179	25,194	22,948	19,165	18,925	282,496
Europe	64,210	68,180	46,654	35,957	28,946	42,406	69,846	74,796	56,030	65,243	56,141	70,010	678,419
Middle East	1,097	1,161	728	1,253	1,085	1,324	1,705	1,921	1,365	1,452	1,338	1,292	15,721
Oceania	2,795	1,770	1,433	1,578	1,555	3,244	4,260	3,968	3,830	2,474	2,248	4,150	33,305
Unclassified	1,791	1,999	1,708	1,719	1,931	1,992	1,890	1,714	1,852	2,202	2,310	2,191	23,299

Source: Directorate of Immigration services



Figure 4: Region Market Share

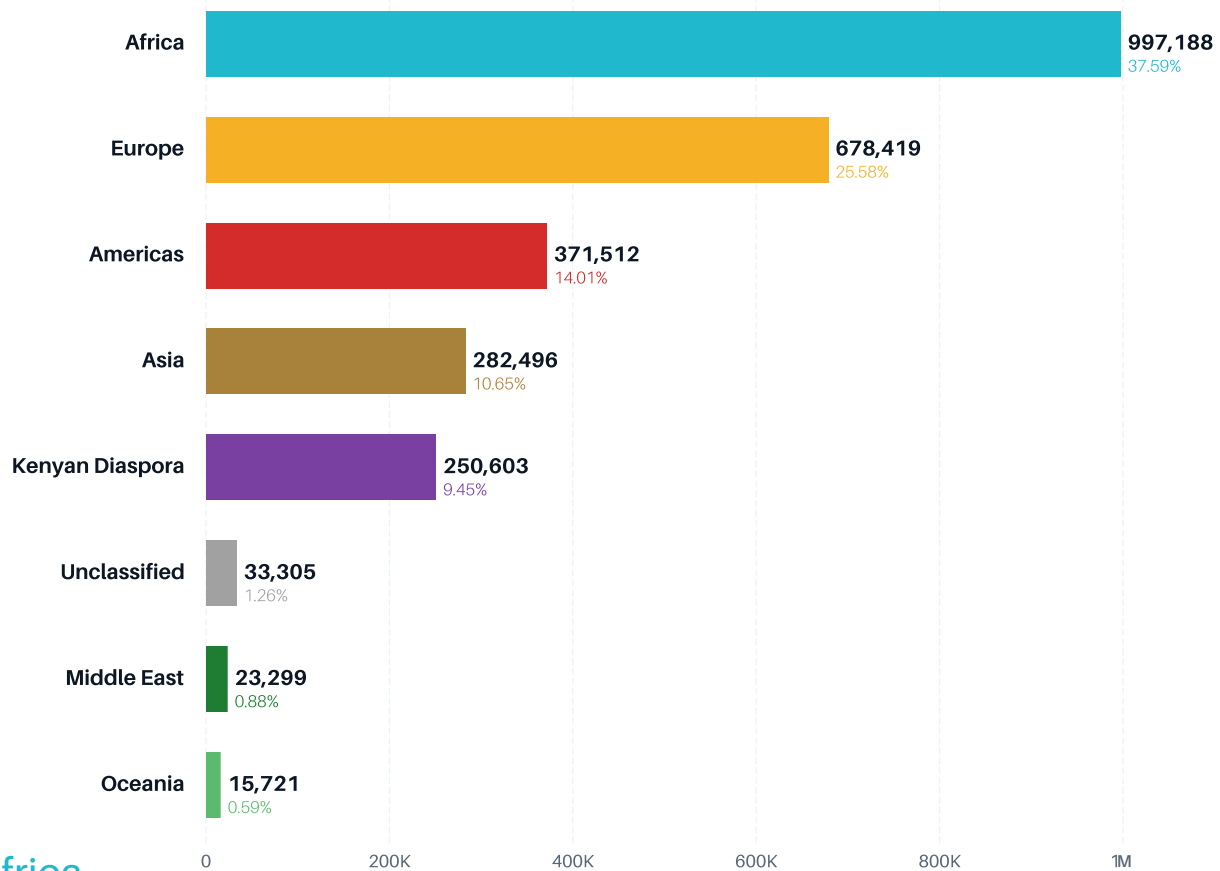


Africa 37.59% 997,188	Europe 25.58% 678,419	Americas 14.01% 371,512	Asia 10.65% 282,496	Kenya Diaspora 9.45% 250,603	Middle East 0.88% 23,299	Oceania 0.59% 15,721	Unclassified 1.26% 33,305
---	---	---	---	--	--	--	---

Total Visitors 2025
2,652,540

2.6 Regional Performance Analysis

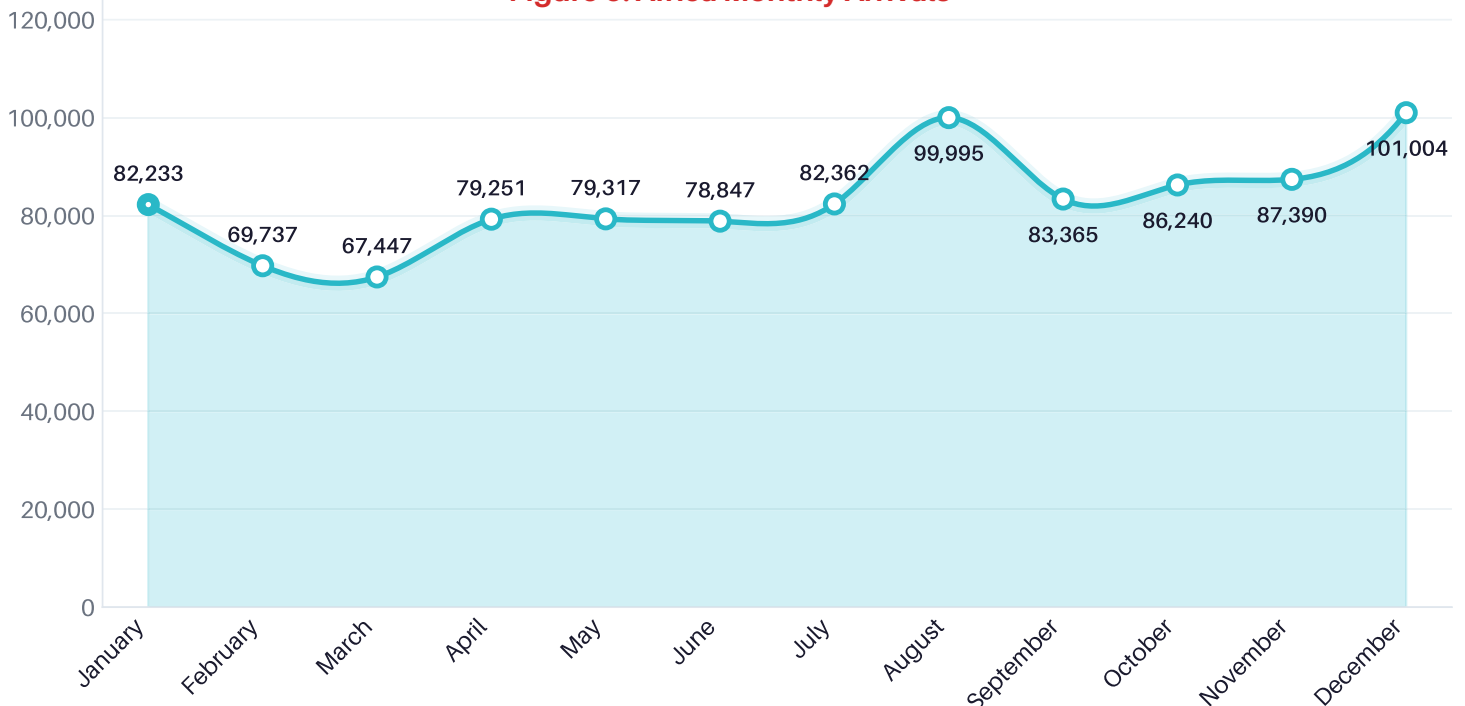
Figure 5: Regional Performance



2.7 Africa

Africa recorded the highest number of arrivals throughout the year, contributing nearly one million visitors in total. Monthly figures remained relatively stable, with noticeable peaks in August and December, indicating strong regional travel during holiday and festive seasons. This consistency underscores Africa's dominance as the primary source market.

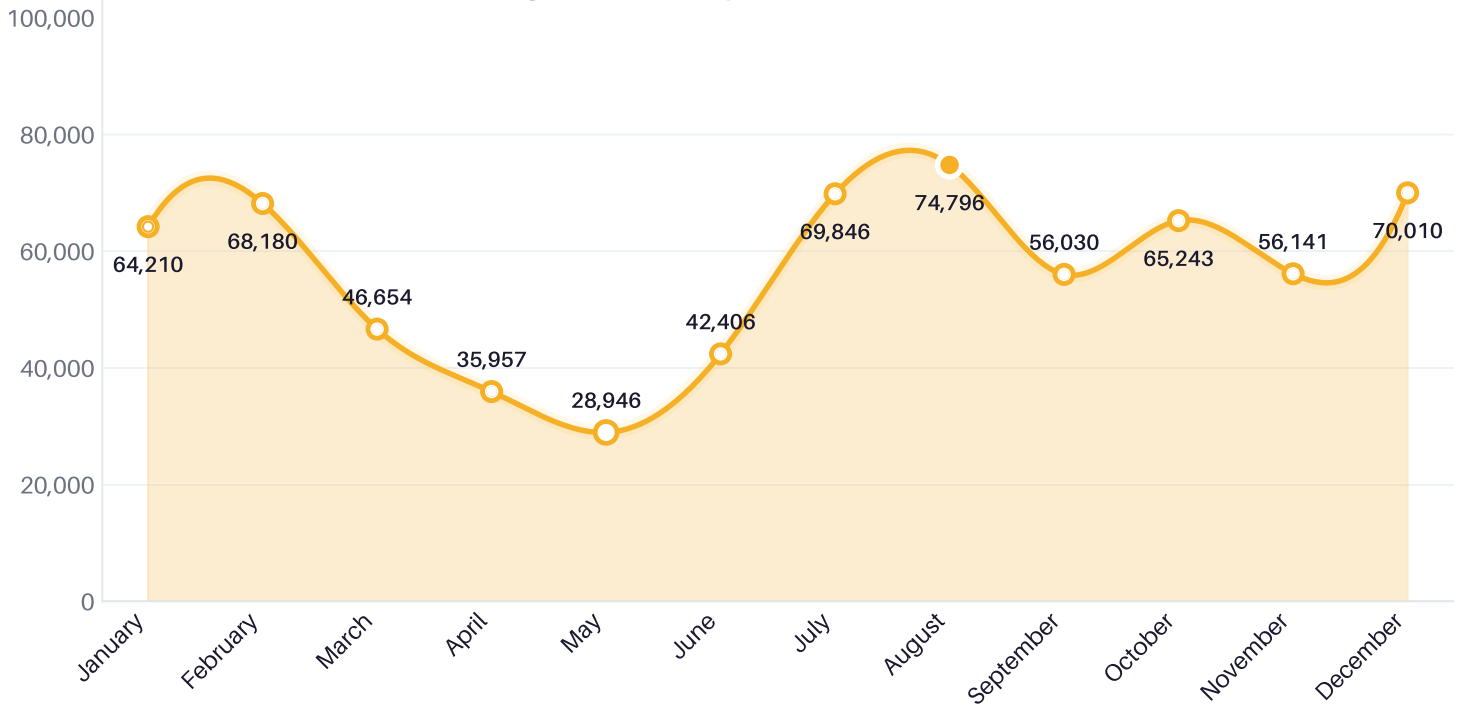
Figure 6: Africa Monthly Arrivals



2.8 Europe

Europe remained one of the top source regions, with strong arrivals at the beginning and end of the year. There was a noticeable dip between April and June, followed by a sharp increase during the summer months, peaking in August. This pattern reflects typical European holiday travel cycles.

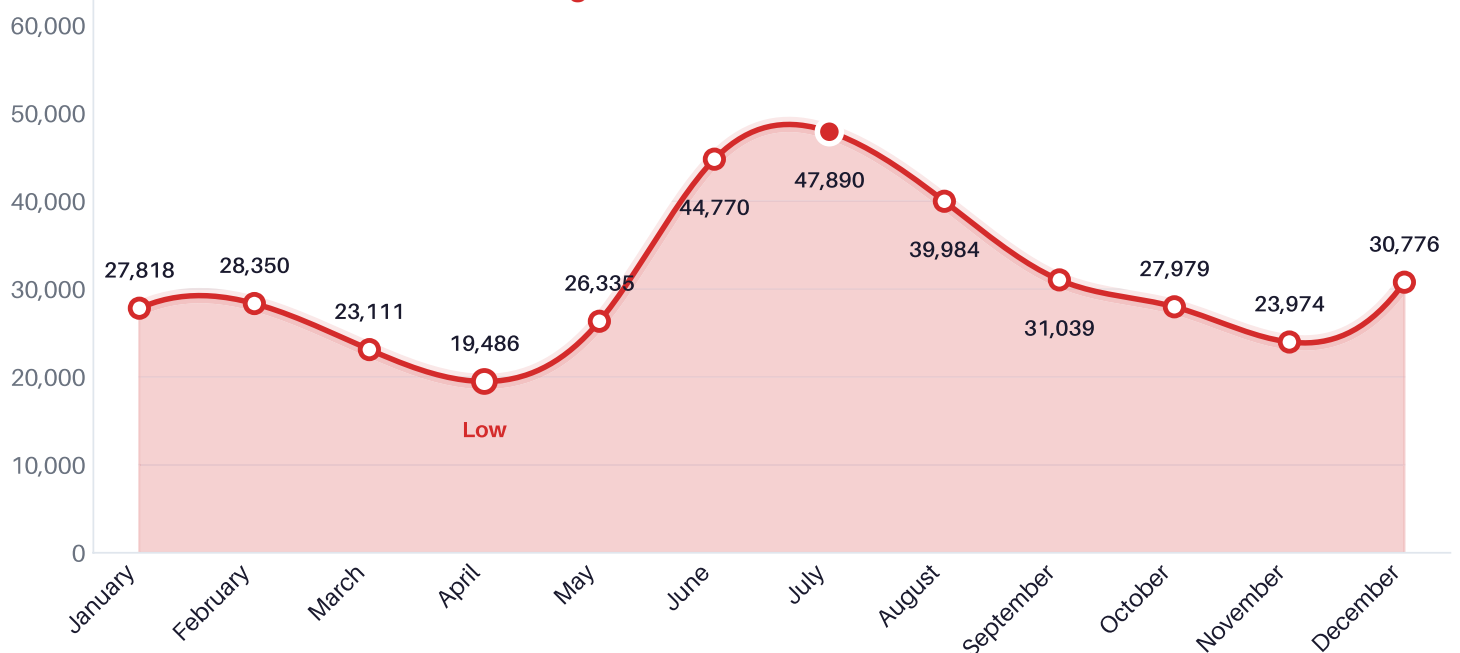
Figure 7: Monthly Europe Arrivals



2.9 Americas

Arrivals from the Americas showed moderate fluctuations, with a clear rise mid-year between June and August. The peak in July suggests increased travel during the Northern Hemisphere summer, followed by a gradual decline toward the end of the year. Overall, the region maintained a steady contribution to total arrivals.

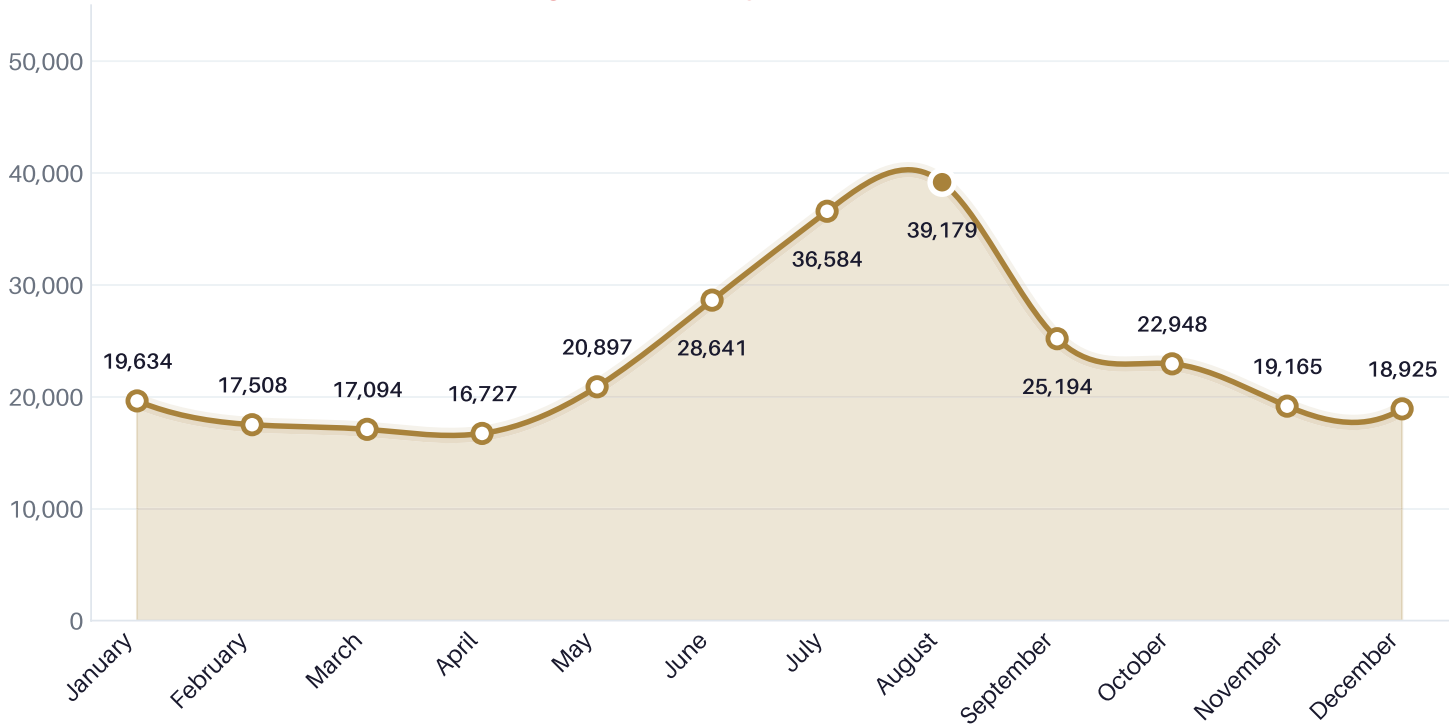
Figure 8: Americas Arrivals



2.10 Asia

Asian arrivals were relatively lower compared to other major regions but displayed a gradual increase during the middle of the year. The highest numbers were recorded between July and August, reflecting seasonal travel patterns. After this peak, arrivals declined steadily toward the end of the year.

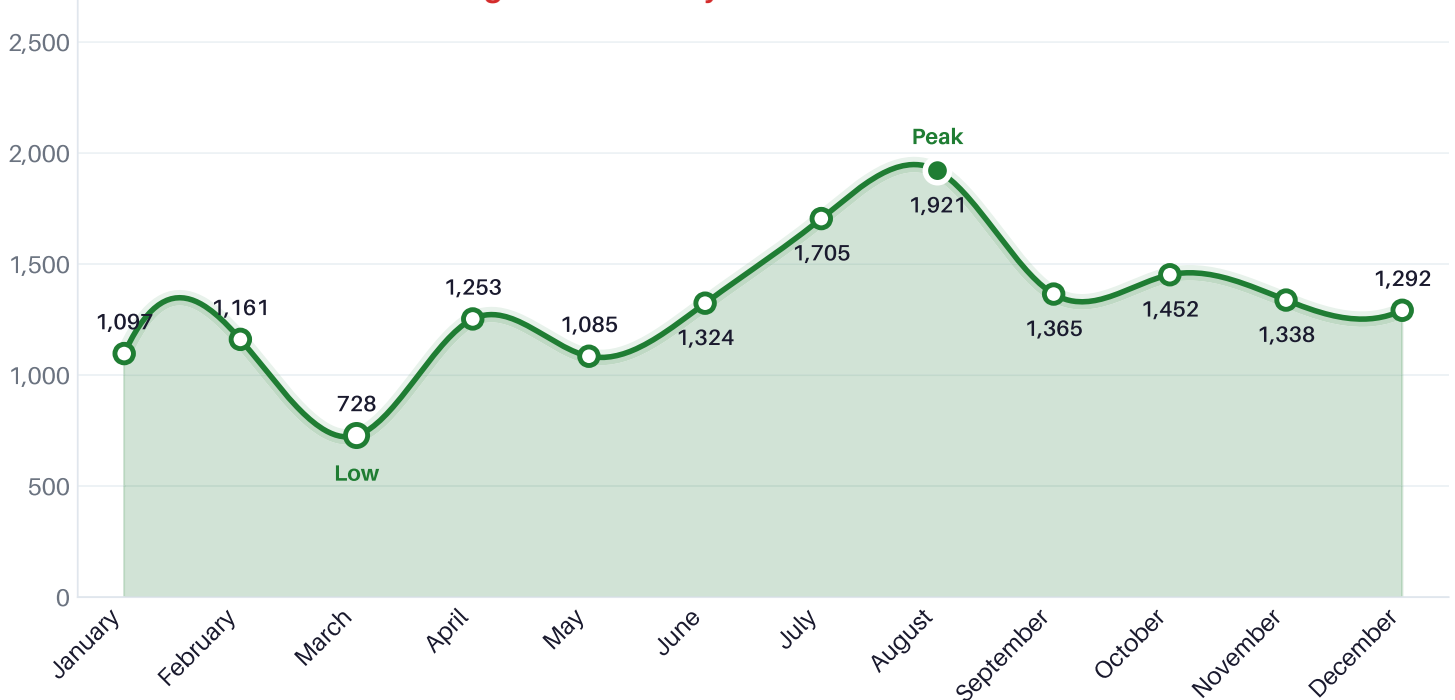
Figure 9: Monthly Asia Arrivals



2.11 Middle East

The Middle East recorded the lowest number of arrivals among all regions, with relatively small monthly variations. Slight increases were observed during the mid-year months, particularly between July and August. Overall, the region contributed a modest but consistent flow of visitors.

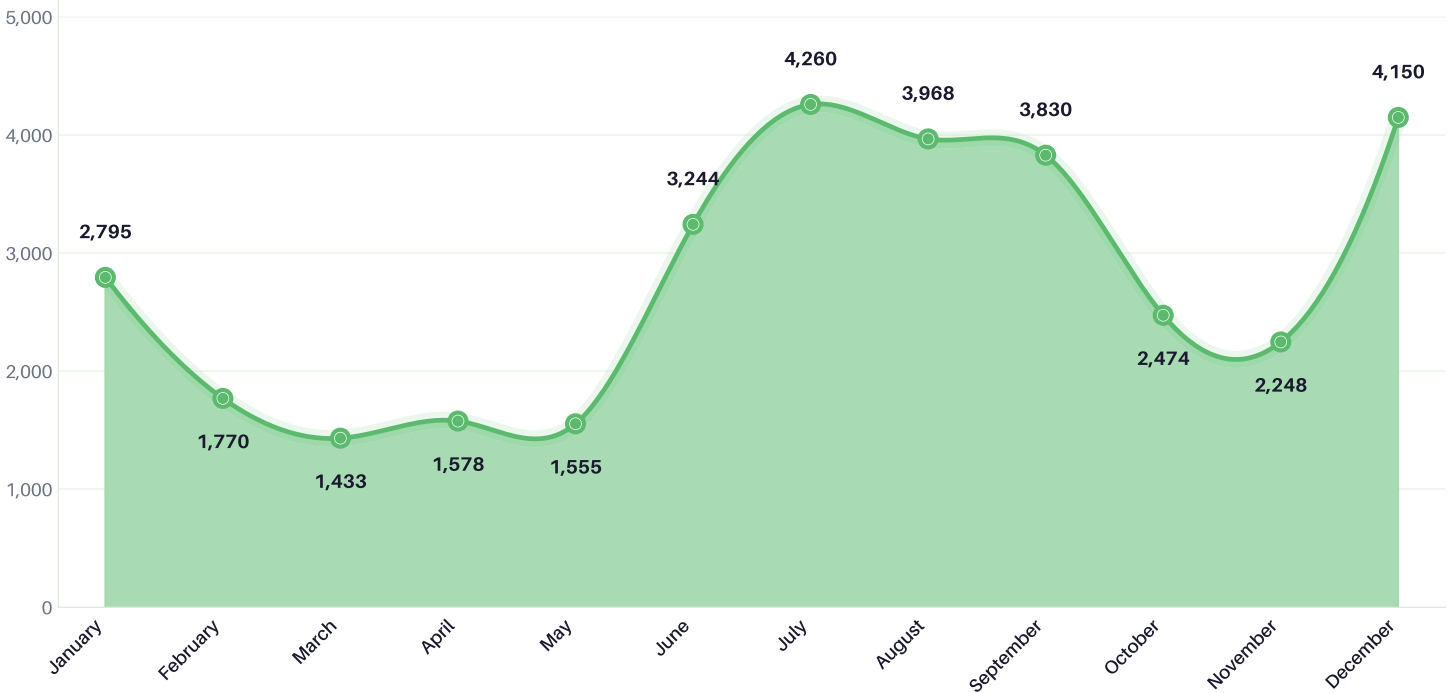
Figure 10: Monthly Middle East Arrivals



2.12 Oceania

Oceania arrivals were relatively low but showed a clear upward trend during the middle of the year. The highest numbers were recorded between June and August, likely reflecting winter travel patterns from the Southern Hemisphere. Arrivals fluctuated toward the end of the year with a slight recovery in December.

Figure 11: Monthly Oceania Arrivals



2.13 Most Improved Source Markets

In 2025, Kenya recorded notable improvements across a wide range of source markets, reflecting sustained recovery and high growth in international arrivals compared to 2024.

The most significant absolute increase was registered by China, which grew by 17,898 arrivals, from 77,099 in 2024 to 94,997 in 2025. This strong performance highlights continued recovery of the Asian market, supported by improved air connectivity, targeted marketing, and growing interest in Kenya for both leisure and business travel.

Italy ranked as the second most improved source market, recording an increase of 17,701 arrivals to reach 106,759 in 2025, thereby strengthening its status as a major European leisure market, especially for coastal tourism. Uganda followed with a growth of 14,139 arrivals, bringing total arrivals to 234,552 and

highlighting the continued strength of regional travel driven by trade, business, education, and visits to friends and relatives (VFR). The United States, Kenya's leading long-haul market, recorded an increase of 11,181 arrivals, reaching 304,491 in 2025, reflecting sustained demand for safari, business, and conference tourism. Similarly, the United Republic of Tanzania posted strong growth, adding 9,616 arrivals to reach 209,531 further demonstrating robust cross-border mobility within the East African region.

Other major long-haul and emerging markets also posted solid gains. India grew by 8,332 arrivals to 112,893 supported by expanding business links, diaspora travel, and leisure tourism. Nigeria recorded a strong increase of 7,763 arrivals reaching 39,427 while the United Kingdom added 7,303 arrivals to reach 170,936 confirming continued strength in traditional European markets.

Table 3: Most Improved Source Markets

No	Nationality	2025	2024	Improved
01	China	94997	77099	17898
02	Italy	106759	89058	17701
03	Uganda	234552	220413	14139
04	United States	304491	293310	11181
05	United Republic of Tanzania	209531	199915	9616
06	India	112893	104561	8332
07	Nigeria	39427	31664	7763
08	United Kingdom	170936	163633	7303
09	Democratic Republic of Congo	43957	37475	6482
10	Rwanda	70600	64163	6437
11	Malaysia	6466	2705	3761
12	Poland	36313	32654	3659
13	Ethiopia	48279	45503	2776
14	Australia	28831	26216	2615
15	Germany	85942	83758	2184
16	Eritrea	8772	6707	2065
17	Japan	12265	10474	1791
18	Russian Federation	9519	7947	1572
19	Pakistan	10370	8805	1565
20	Ghana	17348	15820	1528
21	Egypt	10046	8529	1517
22	France	52298	50850	1448
23	Israel	5545	4098	1447
24	South Africa	36747	35463	1284
25	Belgium	15473	14372	1101
26	Bangladesh	3571	2503	1068
27	Republic of Korea (South Korea)	12202	11197	1005

2024 | Revised 2025 | Provisional

2.14 Purposes of Visit

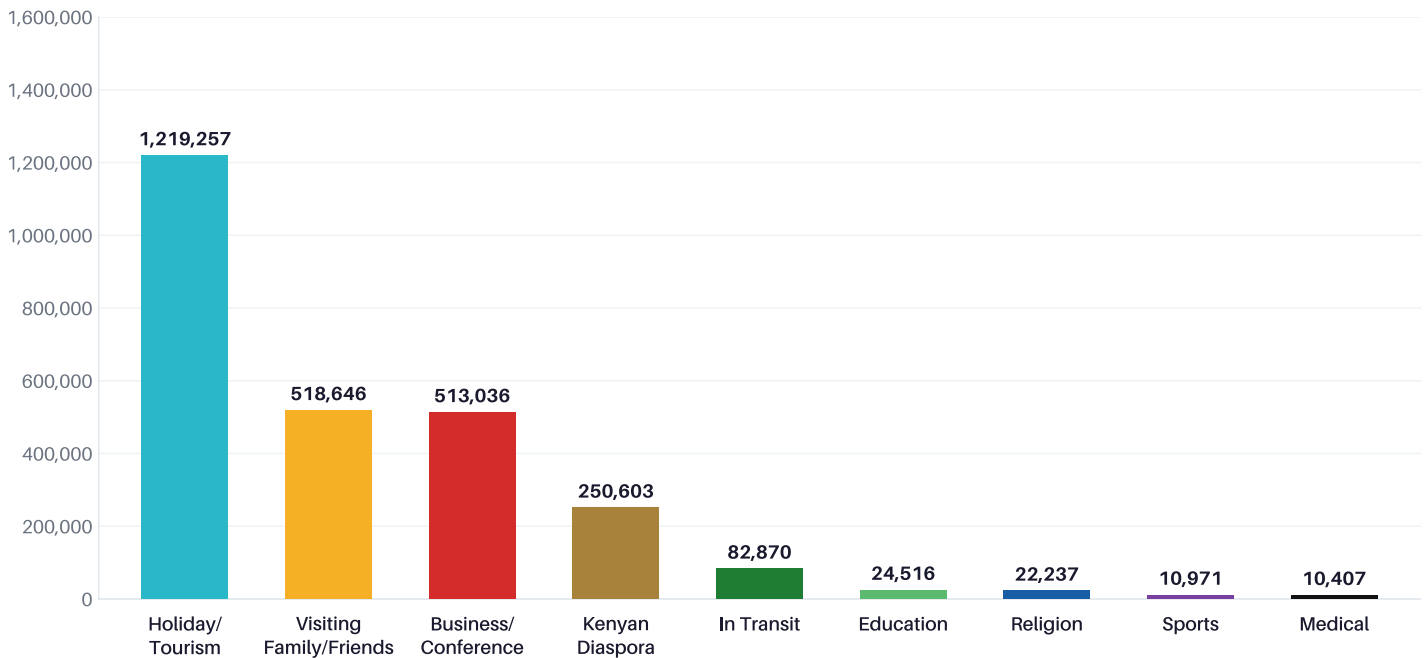
Holiday and leisure travel constituted the largest proportion of visits purpose at 46%. This confirms leisure tourism as the dominant driver of international arrivals and reinforces Kenya’s competitive advantage as a premier safari and beach destination. VFR represented a combined 29% of total arrivals. Of this, 20% came to visit family and friends, while the additional 9% were Kenyan diaspora returning home.

This highlights the strong role of personal and cultural ties in sustaining inbound travel. Business and conference travel accounted for 19% of visits, indicating the continued relevance of the MICE segment while highlighting the need for targeted strategies to expand and diversify this segment.

Transit passengers comprised 3% of visitors. Other travel purposes accounted for relatively small shares, reflecting niche segments that present opportunities for product diversification and targeted growth.



Figure 12: Purpose of Visit



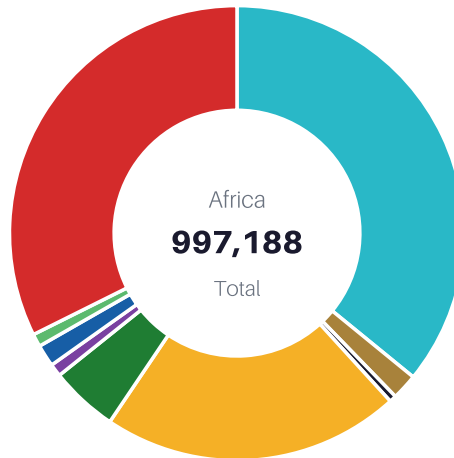
Source: Directorate of Immigration services

2.15 Arrivals by region and Purpose of Visit

Africa

Africa remains a strong source market, with significant travel driven by visiting family and friends, followed by business and tourism. The region also records notable movement in transit and religious travel, reflecting close regional ties and mobility. Overall, travel patterns suggest a mix of social, economic, and cultural connections.

Figure 13: Africa Purpose of Visit

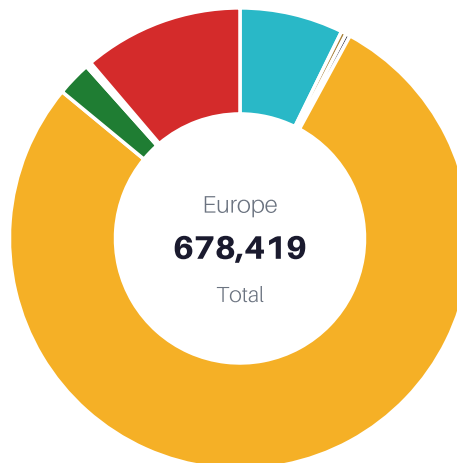


Holiday/Tourism	357,957	35.9%
Visiting Family	18,442	1.8%
Business/Conf.	4,847	0.5%
Kenyan Diaspora	211,505	21.2%
In Transit	48,036	4.8%
Medical	8,974	0.9%
Religion	15,673	1.6%
Sports	9,117	0.9%
Other	322,637	32.4%

Europe

Europe is the largest contributor to holiday tourism, dominating all other regions in this category. Business travel and visits to friends and relatives also form important segments, though at much lower levels. The data underscores Europe's importance as a high-value leisure market.

Figure 14: Europe Purpose of Visit

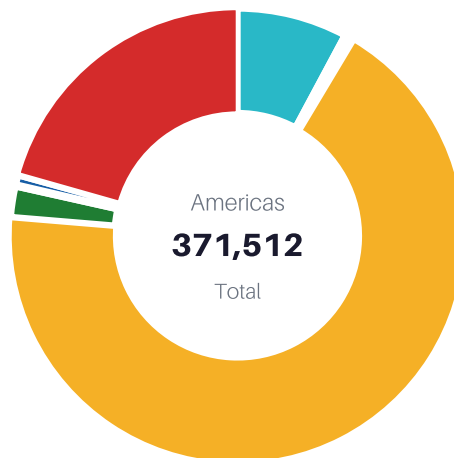


Holiday/Tourism	49,259	7.3%
Visiting Family	2,413	0.4%
Business/Conf.	2,044	0.3%
Kenyan Diaspora	529,586	78.1%
In Transit	16,398	2.4%
Medical	899	0.1%
Religion	1,143	0.2%
Sports	598	0.1%
Other	76,079	11.2%

Americas

The Americas are predominantly tourism-driven, with holiday travel accounting for the vast majority of arrivals. Visiting friends and relatives is the second key motivator, while business and other purposes contribute relatively smaller shares. This highlights the region's strong leisure travel orientation.

Figure 15: Americas Purpose of Visit

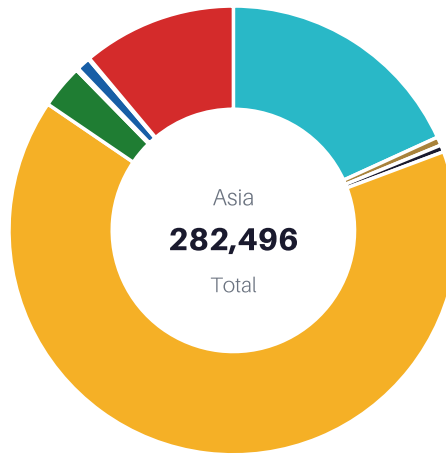


Holiday/Tourism	29,064	7.8%
Visiting Family	1,639	0.4%
Business/Conf.	1,192	0.3%
Kenyan Diaspora	251,658	67.7%
In Transit	8,095	2.2%
Medical	490	0.1%
Religion	2,482	0.7%
Sports	350	0.1%
Other	76,542	20.6%

Asia

Asia shows a balanced distribution between holiday tourism and business-related travel, with tourism leading. Visiting friends and relatives also contributes significantly, while other purposes remain minimal. The region reflects both economic engagement and growing leisure travel interest.

Figure 16: Asia Purpose of Visit

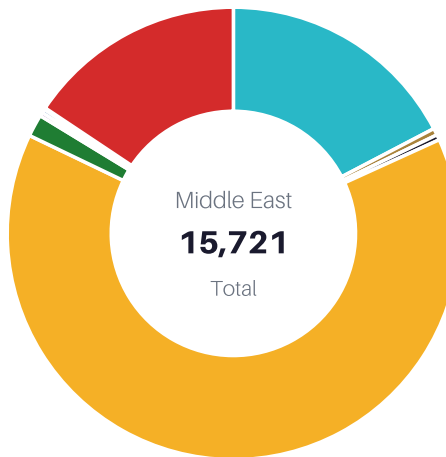


Holiday/Tourism	51,361	18.2%
Visiting Family	1,730	0.6%
Business/Conf.	1,423	0.5%
Kenyan Diaspora	184,233	65.2%
In Transit	8,912	3.2%
Medical	477	0.2%
Religion	2,774	1.0%
Sports	253	0.1%
Other	31,333	11.1%

Middle East

The Middle East contributes relatively small volumes across all travel purposes, with tourism and visiting friends and relatives being the main drivers. Business and transit travel are present but limited. Overall, the region represents a niche but diverse market.

Figure 17: Middle East Purpose of Visit

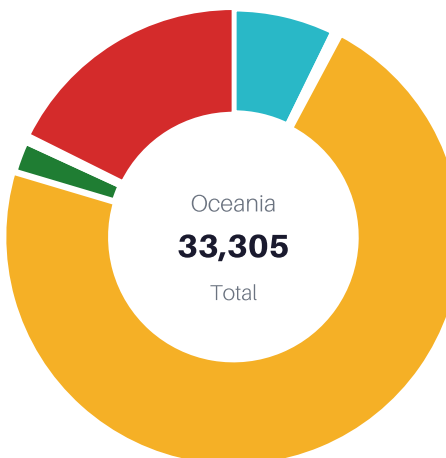


Holiday/Tourism	2,725	17.3%
Visiting Family	77	0.5%
Business/Conf.	60	0.4%
Kenyan Diaspora	10,049	63.9%
In Transit	249	1.6%
Medical	42	0.3%
Religion	42	0.3%
Sports	18	0.1%
Other	2,459	15.6%

Oceania

Oceania is primarily driven by holiday tourism, with a moderate contribution from visiting friends and relatives. Other travel purposes such as business and transit remain relatively low. This indicates a largely leisure-focused travel pattern.

Figure 18: Oceania Purpose of Visit



Holiday/Tourism	2,410	7.2%
Visiting Family	104	0.3%
Business/Conf.	86	0.3%
Kenyan Diaspora	23,913	71.8%
In Transit	753	2.3%
Medical	46	0.1%
Religion	89	0.3%
Sports	29	0.1%
Other	5,875	17.6%

Table 4: Arrivals By Region & Purpose of Visit

	Business/ Conference	Education	Employment	Holiday/ Tourism	In Transit	Medical	Religion	Sports	Visiting Fam/Friends	Total
Africa	357,957 35.9%	18,442 1.8%	4,847 0.5%	211,505 21.2%	48,036 4.8%	9,117 0.9%	15,673 1.6%	8,974 0.9%	322,637 32.4%	997,188
Americas	29,064 7.8%	1,639 0.4%	1,192 0.3%	251,658 67.7%	8,095 2.2%	350 0.1%	2,482 0.7%	490 0.1%	76,542 20.6%	371,512
Asia	51,361 18.2%	1,730 0.6%	1,423 0.5%	184,233 65.2%	8,912 3.2%	253 0.1%	2,774 1.0%	477 0.2%	31,333 11.1%	282,496
Europe	49,259 7.3%	2,413 0.4%	2,044 0.3%	529,586 78.1%	16,398 2.4%	598 0.1%	1,143 0.2%	899 0.1%	76,079 11.2%	678,419
Middle East	2,725 17.3%	77 0.5%	60 0.4%	10,049 63.9%	249 1.6%	18 0.1%	42 0.3%	42 0.3%	2,459 15.6%	15,721
Oceania	2,410 7.2%	104 0.3%	86 0.3%	23,913 71.8%	753 2.3%	29 0.1%	89 0.3%	46 0.1%	5,875 17.6%	33,305
Unclassified	10,409 44.7%	111 0.5%	199 0.9%	8,313 35.7%	427 1.8%	42 0.2%	34 0.1%	43 0.2%	3,721 16.0%	23,299
Total	503,185	24,516	9,851	1,219,257	82,870	10,407	22,237	10,971	518,646	

Low intensity

Medium

High intensity

Source: Directorate of Immigration services





2.16 Top 30 Source Markets by Entry Points, 2025

In 2025, Kenya's arrivals by entry point continued to reflect a clearly structured and diversified gateway system that effectively serves long-haul, leisure, and regional travel markets. JKIA remained the principal entry point for most international visitors, particularly from major long-haul markets such as the United States, United Kingdom, India, China, Germany, and France.

This underscores JKIA's role as Kenya's main international hub, supported by extensive global connectivity and its central position within Nairobi's business and diplomatic landscape.

Moi International Airport (MIA), Mombasa, retained its position as the second most important gateway,

especially for European leisure tourists. Strong arrivals from Italy, Poland, Germany, the Netherlands, Spain, and Scandinavian countries highlight MIA's close association with coastal tourism, driven largely by charter and seasonal flights that offer direct access to beach destinations.

Land border entry points, including Busia, Malaba, Namanga, and Lunga Lunga, continued to dominate arrivals from neighbouring countries such as Uganda, the United Republic of Tanzania, Rwanda, Burundi, and the Democratic Republic of Congo. These movements reflect robust intra-regional travel linked to trade, employment, education, medical services, and VFR.

Table 5: Top 30 Source Markets by Entry Point

NATIONALITY	BUSIA	ELDORET AIRPORT	GARISSA/TANA BRIDGE	ISEBANIA	ISILO AIRPORT	JKA	Kilindini	KISUMU AIRPORT	KISUMU PIER	LOITOKTOK	LOMCHOGIO AIRPORT	LUNGALUNGA	LWAKHAKHA	MALABA	MALINDI AIRPORT	MIA	MOVALE	MUHURU BAY	NADAPAL	NAMANGA	SHIMONI SEAPORT	SUAM	TAVETA	VANGA SEAPORT	WAJIR AIRPORT	WILSON AIRPORT	Total
United States	1695	51	422	5818	15	271129	2230	941		321	14	533	24	601	3	5798	138	3	25	9121	4	67	241		217	5080	304491
Uganda	105544	6	3	861		56666		59	3	427		605	23512	32198		5151	64	1	58	5366		2861	1081			86	234552
United Republic of Tanzania	3621		3	10300		30733		4	1	12143		38377	1215	1276	1	3052	66	39	3	96923	972	77	10306	32		387	209531
United Kingdom	698	6	24	655		153477	388	45		221	2	793	10	367	8	10682	35	1	2	2637	6	34	264			581	170936
India	2840	1	1	424		100216	4	30	24	296		471	10	865		3826	52			3312	5	99	158			259	112893
Italy	84	7		54		28699	13	5		27	1	69	1	29		77251	9		2	388	1	12	46			61	106759
China	477		1	939		88431	41	13		357		67	9	216	4	1178	239		8	2828	8	9	63			109	94997
Germany	532	2	1	252		46242	390	19		310		241	6	202	1	35380	37		6	1905	6	29	247			134	85942
Somalia	221		148	1		75322				6		23	41	2075		372	81		34	84			2			44	78454
Rwanda	25547			115		20841		1		129		236	2542	3511		406	21		14	1000		15	16206			16	70600
France	149			52		46451	24			37	0	102	4	26		4560	13		1	685	1	17	69			107	52298
Burundi	8925		3	14114		12223				69		409	158	1971		95	7		1	3604		6	8199			23	49807
Ethiopia	343		58	11		30081				5		25	129	679		3933	12719		38	191			9			58	48279
Canada	266	2	36	474		39562	370	74		74	0	228	11	134		2109	30	2	3	1308	1	7	67			452	45210
South Sudan	11131	14	3	30		29292		6		17	4	40	144	1438		175	333		696	513		24	7			204	44071
Democratic Republic of Congo	9593	6		628		23264		1		120		326	4866	1936		415	25		1	2585		15	61			115	43957
Nigeria	492			22		37381		3		4		22	4	107		1095	30		8	247			2			10	39427
South Africa	124	2	5	89		34843	10	32		27	7	69	3	31	6	737	8			546	9	13	57			129	36747
Poland	45			190		6109	20	1		17		76		17		29273	13			475	8	8	38			23	36313
Netherlands	202		4	96		31543	28	6		70	3	121	5	70	8	1798	8			1519	4	39	126			97	35747
Australia	487		10	836		24057	119	35		217	1	51	2	157		639	15		3	1812		10	59			321	28831
Spain	96			437		25247	8	30		22		48		20	3	1050	6			572		6	36			66	27647
Sweden	89		13	14		18887	38	4		6		92	5	31		1628	12			256			61			52	21188
Ghana	175			18		16455				6		29	2	33		380	13			211		4	8			14	17348
Belgium	84			33		12329	19	1		14	1	60	1	22	2	2398	3			370		14	55			67	15473
Norway	158		7	39		13595	1			20		39	1	28		966	5			271			78			28	15236
Zimbabwe	170			37		13342	1	1		13		56		60	1	449	4		1	552		3	44			23	14757
Switzerland	76			57		9809	86	1		28	1	50		40		3605	19		1	266	3	17	61			36	14156
Denmark	78		1	21		11973	8			8		49		24		1715	3			224		7	24			16	14151
Japan	70			52		11426	3	1		13		8	7	12		225	79			330		2	7			30	12265

Source: Directorate of Immigration services

2.17 Top Source Markets by Region

Africa

The African region dominates arrivals, led by Uganda (234,552) and United Republic of Tanzania (209,531), reflecting strong regional mobility and cross-border ties. Mid-level contributions come from Somalia (78,454), Rwanda (70,600), and Burundi (49,807), while countries such as Ethiopia, South Sudan, and Democratic Republic of the Congo each contribute over 40,000 visitors. Smaller but still notable flows originate from Nigeria and South Africa, indicating a broad continental spread of visitors.

Europe

European arrivals are led by United Kingdom (170,936), followed by Italy (106,759) and Germany (85,942), highlighting strong demand from Western Europe. Secondary markets include France (52,298), Poland (36,313), and Netherlands (35,747). Smaller yet steady contributions come from countries like Spain, Sweden, Belgium, and Norway, indicating a diverse but top-heavy distribution.

Americas

Arrivals from the Americas are heavily concentrated in United States with 304,491 visitors, far surpassing all other countries in the region. Canada follows at a much lower 45,210, while the rest of the region contributes relatively small numbers, including Mexico (5,331) and Brazil (3,599). Other countries such as Colombia, Argentina, and Chile each account for only a few thousand or fewer visitors, showing a steep drop-off beyond the top two markets.

Asia

Asian arrivals are driven primarily by India (112,893) and China (94,997), which together account for the bulk of the region's visitors. A second tier includes Japan (12,265) and South Korea (12,202), followed by Pakistan (10,370). Other markets such as Malaysia, Taiwan, Philippines, Bangladesh, and Sri Lanka contribute smaller but notable volumes, reflecting a wide regional spread.

Middle East

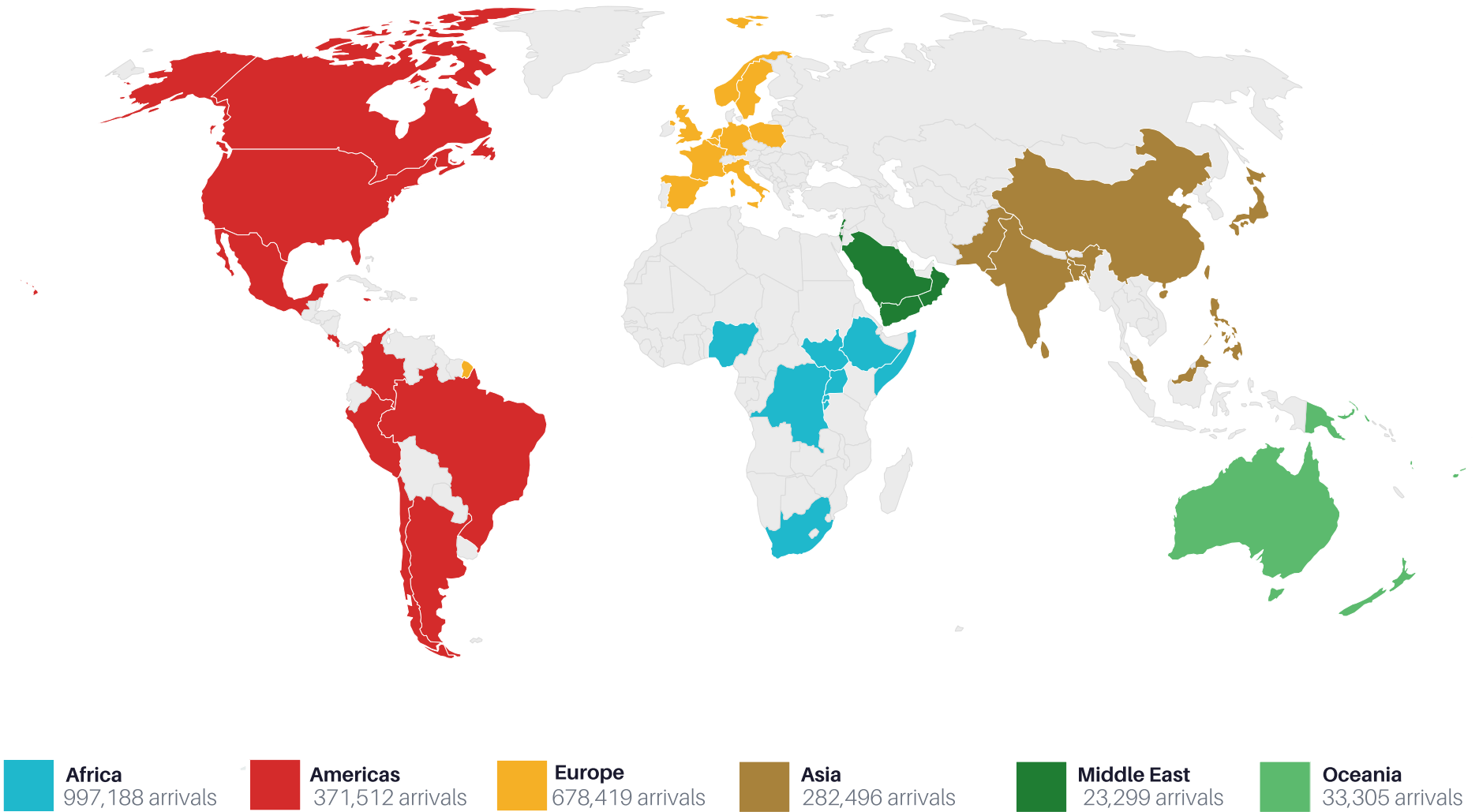
The Middle East contributes relatively modest numbers, led by Israel with 5,545 visitors. This is followed by Saudi Arabia (2,307) and Yemen (2,025), while Oman (1,762) and Lebanon (1,429) record smaller inflows. Overall, the region shows limited but steady engagement compared to others.

Oceania

Oceania is dominated by Australia with 28,831 visitors, accounting for the vast majority of arrivals from the region. New Zealand contributes a much smaller 3,943, while Pacific island nations such as Fiji, Papua New Guinea, and Vanuatu register minimal numbers. This highlights a highly concentrated market with limited diversification.



Figure 19: Top Source Markets by Region



2.18 Main Purpose of Visit by Top Source Markets

The following analysis details the primary drivers of travel for Kenya's top-performing source markets. This assessment focuses on the top two purposes of entry for the main markets per region.

Regional Market Analysis: Africa



Uganda

Business and conference travel accounted for 41.4% of travel, followed by Visiting Friends and Relatives (VFR) at 31.6%.



United Republic of Tanzania

Business remains the dominant motivator at 42.1% share followed closely by VFR at 32.8%



Somalia

Travel was heavily weighted towards VFR, which accounted for 60.5% of travel. Holiday and leisure travel followed at 25.6%.



Rwanda

Business/ Conference leads at 49.1%, followed by VFR at 32.2%



Burundi

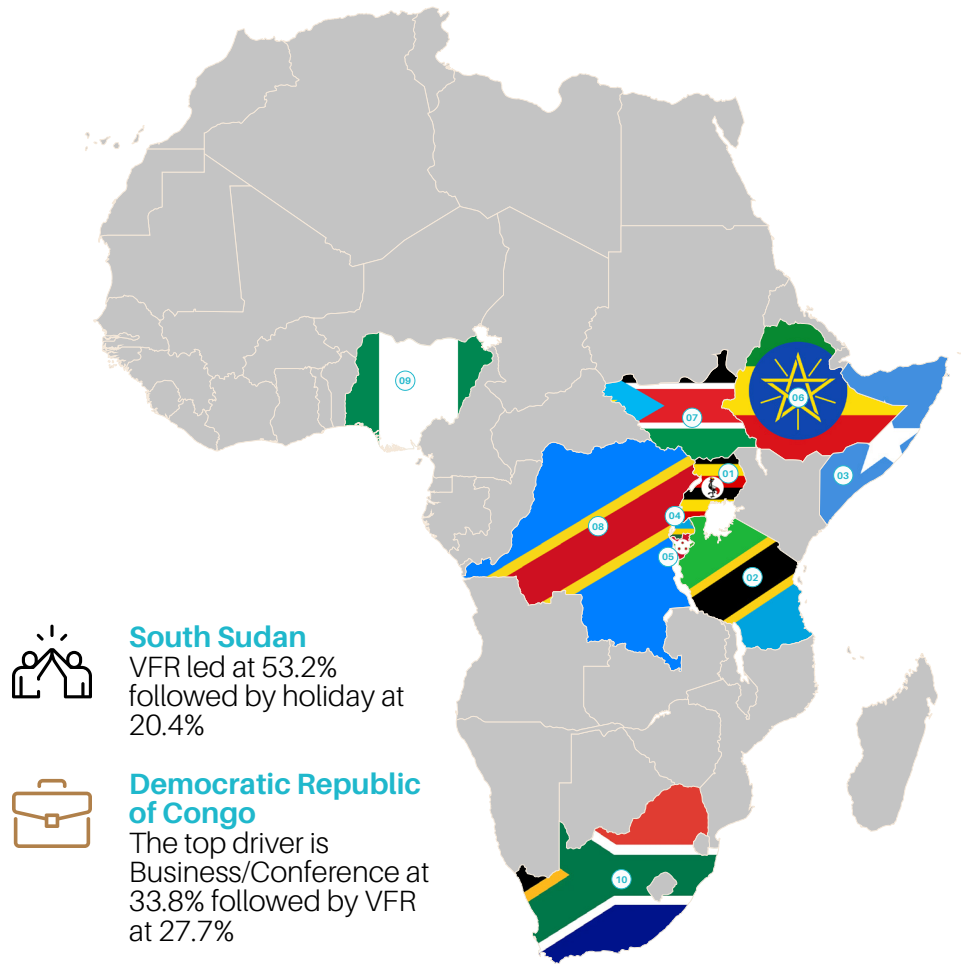
VFR leads as the main purpose of travel at 45.9% followed by Business/Conference at 35.2%



Ethiopia

VFR was the leading purpose of visit, accounting for 44% of visits, followed by holiday travel at 29%.

Figure 20: Africa Regional Market Analysis.



South Sudan

VFR led at 53.2% followed by holiday at 20.4%



Democratic Republic of Congo

The top driver is Business/Conference at 33.8% followed by VFR at 27.7%



Nigeria

Holiday travel was the dominant purpose of visit at 44.8%, followed by business and conference travel at 30.6%.



South Africa

The market is led by Holiday/Leisure with 44.4%, closely followed by Business/Conference at 36.2%



Business/
Conference
travel



Business



VFR



Holiday/
Leisure



2.19 International Market Analysis

Europe



United Kingdom

Holiday/leisure accounted for 67.3% of visits, followed by VFR at 20%.



Italy

Holiday/Leisure accounted for a 93.2% share of leisure travel, with Business/Conference travel following at 2.6%.



Germany

Holiday/Leisure accounted for 81.6% of the total, followed by VFR at 9.7%.



France

Holiday/Leisure travel accounted for 75.5% of arrivals, followed by Business/Conference travel at 9%.

Americas



United States of America

Holiday/Leisure accounted for 67.4% , with VFR following at 21.5%.



Canada

Holiday/Leisure led with 67%, followed by VFR at 21.4%.



Brazil

Holiday/Leisure accounted for 69.30% , followed by Business/Conference 18.8%.

Asia & Oceania



India

Holiday/Leisure led by 59.8%, followed by Business/Conference at 16.4%.



China

Holiday/Leisure led by 71.3% . Business/Conference follows at 19.8%.



Israel

Visitors primarily arrive for Holiday/Leisure at 80.10% share, followed by Business/Conference 10.8%.



Australia

Holiday/Leisure accounted for 72.2%, followed by VFR at 18.2%.



Business/
Conference
travel



Business



VFR



Holiday/
Leisure





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

East African Community (EAC), arrivals were largely driven by practical and social needs rather than leisure. Business and conference travel accounted for 47% of total arrivals, making it the leading Purpose of Visit. Closely following was visiting friends and relatives (VFR), which contributed 31.7%, reflecting strong

regional social and family ties. In contrast, leisure travel and other purposes represented a smaller share of arrivals, indicating that tourism for recreation is still less dominant compared to work-related and relationship-based travel across the region as shown in table 6.

Table 6: E.A.C Purpose of Visit

Nationality	Business/ Conference	Education	Employment	Holiday/Tourism	In Transit	Medical	Religion	Sports	Visiting Family/ Friends	Total
Uganda	97050	4776	1444	38246	8763	2157	4278	3723	74115	234,552
United Republic of Tanzania	88127	5560	1530	26746	6970	2702	7781	1441	68675	209,536
Somalia	8763	279	181	20769	344	499	45	86	47488	78,454
Rwanda	34699	1096	149	8970	1710	547	311	388	22730	70,600
Burundi	17521	579	200	5415	2357	323	325	215	22872	49,807
South Sudan	8316	1274	113	8989	830	767	196	121	23465	44,071
Democratic Republic of Congo	14873	1093	89	9347	4329	1021	606	416	12183	43,957

Source: Directorate of Immigration services

2.21 East African Community (EAC) Arrivals by Point of Entry.

JKIA recorded the highest number of East African Community (EAC) arrivals at 248,341 accounting for 33.9% of the total. Busia Border Post and Namanga Border Post followed with 164,582 and 110,075

arrivals respectively. While JKIA leads as a single-entry point, most arrivals occur through land borders, reflecting strong regional mobility. This movement supports tourism growth, as travellers explore shared

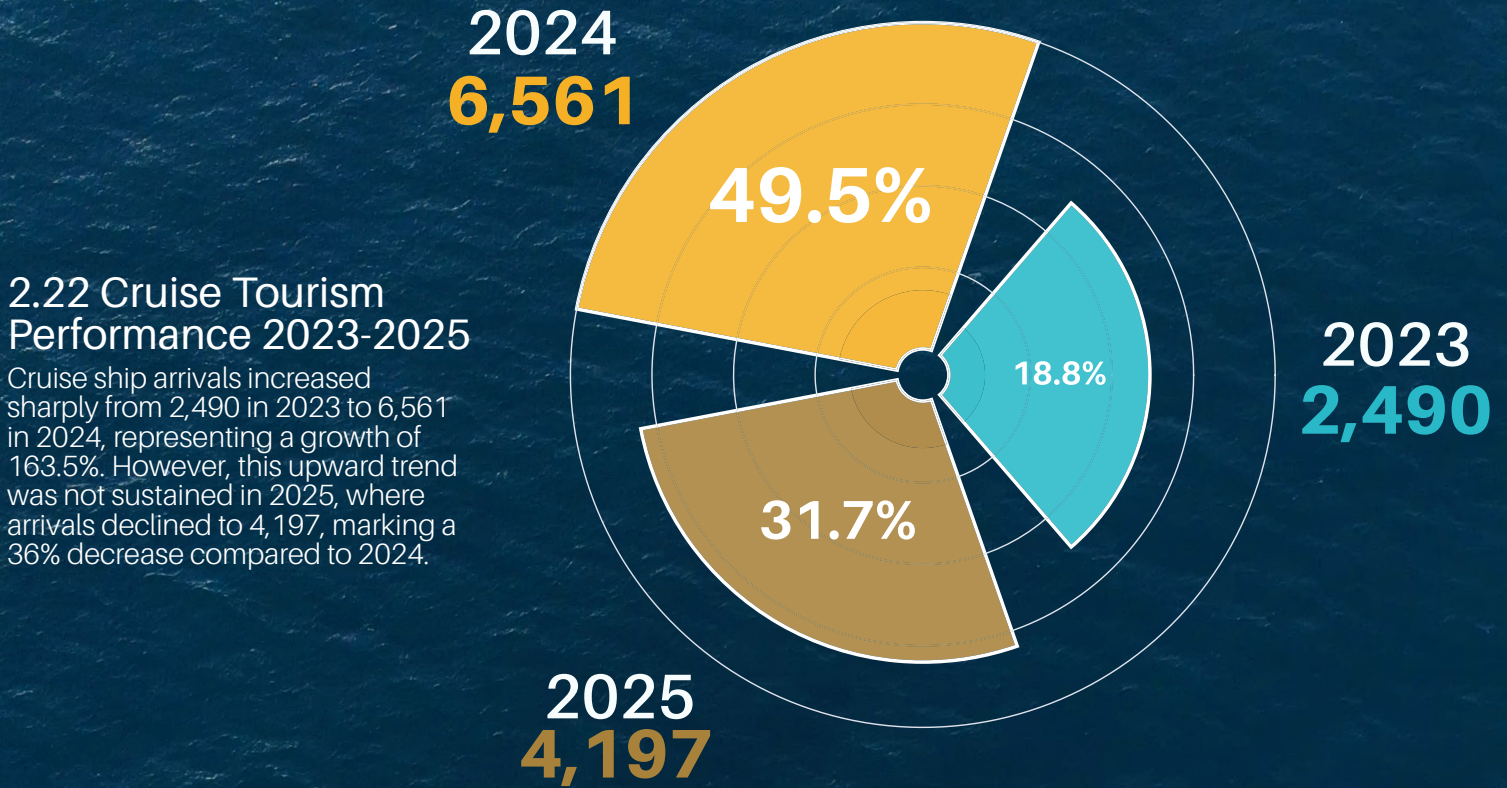
attractions, cultural heritage, and cross-border destinations within the EAC, reinforcing regional integration and economic activity.

Table 7: E.A.C Arrivals by Border Points

BORDER	ARRIVALS	%
Jkia	248,341	33.9
Busia	164,582	22.5
Namanga	110,075	15
Malaba	44,405	6
Lungalunga	40,016	5
Taveta	35,862	4.9
Lwakhakha	32,478	4.4
Isebania	26,049	3.5
Loitoktok	12,911	1.7
Mia	9,666	1.3
Suam	2,998	0.4
Shimoni Seaport	972	0.1
Wilson Airport	875	0.119
Nadapal	807	0.114
Moyale	597	0.08
Others	339	0.04

Source: Directorate of Immigration services

Figure 21: Cruise Tourism Performance 2023-2025



2.22 Cruise Tourism Performance 2023-2025

Cruise ship arrivals increased sharply from 2,490 in 2023 to 6,561 in 2024, representing a growth of 163.5%. However, this upward trend was not sustained in 2025, where arrivals declined to 4,197, marking a 36% decrease compared to 2024.

Source: Directorate of Immigration services



03 | CHAPTER THREE

ECONOMIC CONTRIBUTION



3.1 Economic Contribution

Tourism is a key driver of economic growth, contributing directly and indirectly to national income, employment creation, and foreign exchange earnings.

This chapter analyses the economic contribution of the tourism sector by examining inbound tourism earnings and tourism-related tax revenues.

Together, these indicators provide a comprehensive assessment of the sector's contribution to public finances, conservation financing, and national development objectives.

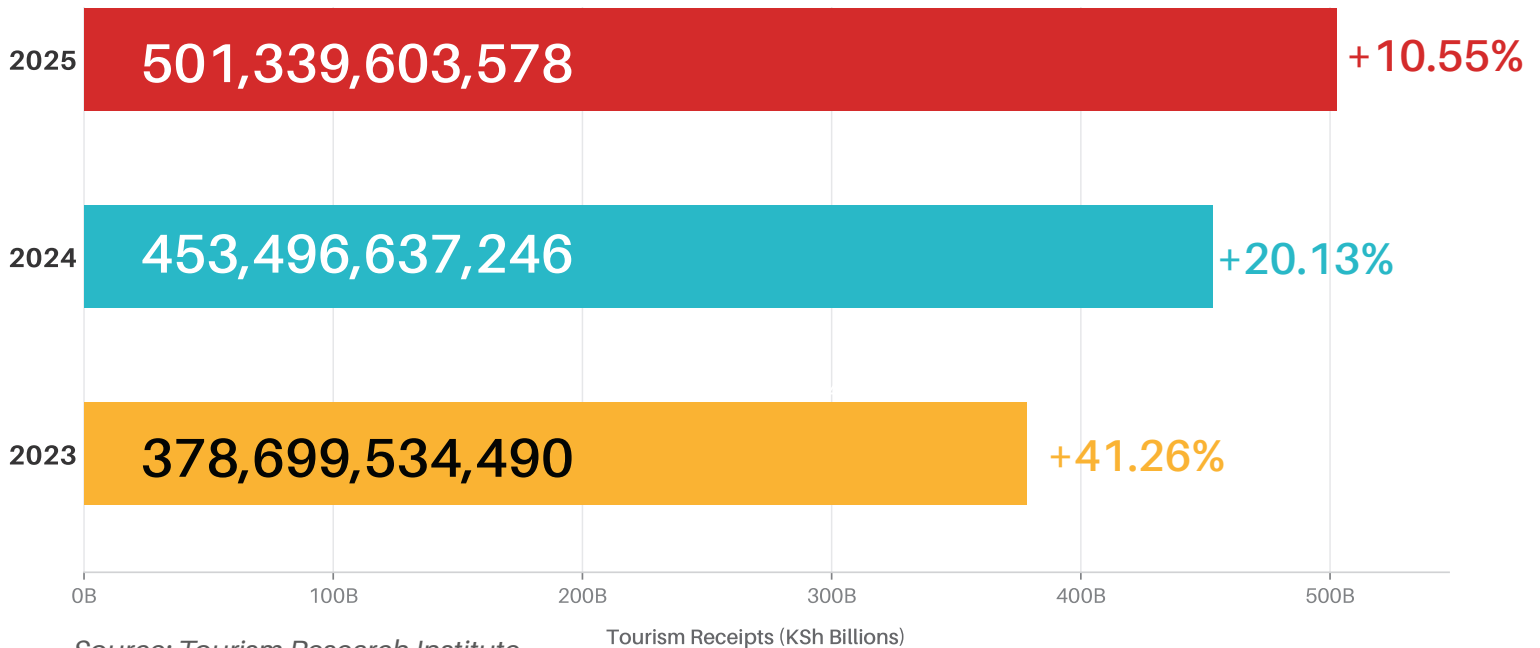
These revenue streams underscore the tourism sector's critical role in strengthening fiscal sustainability while providing sustainable

financing for conservation, heritage preservation, and the long-term management of Kenya's natural and cultural assets.

3.2 Inbound Tourism Earnings

The inbound tourism earnings rose by 10.55 % from KSh 453.50 billion in 2024 to KSh 501.34 billion in 2025.

Figure 22: Inbound Tourism Earnings, 2023 -2025

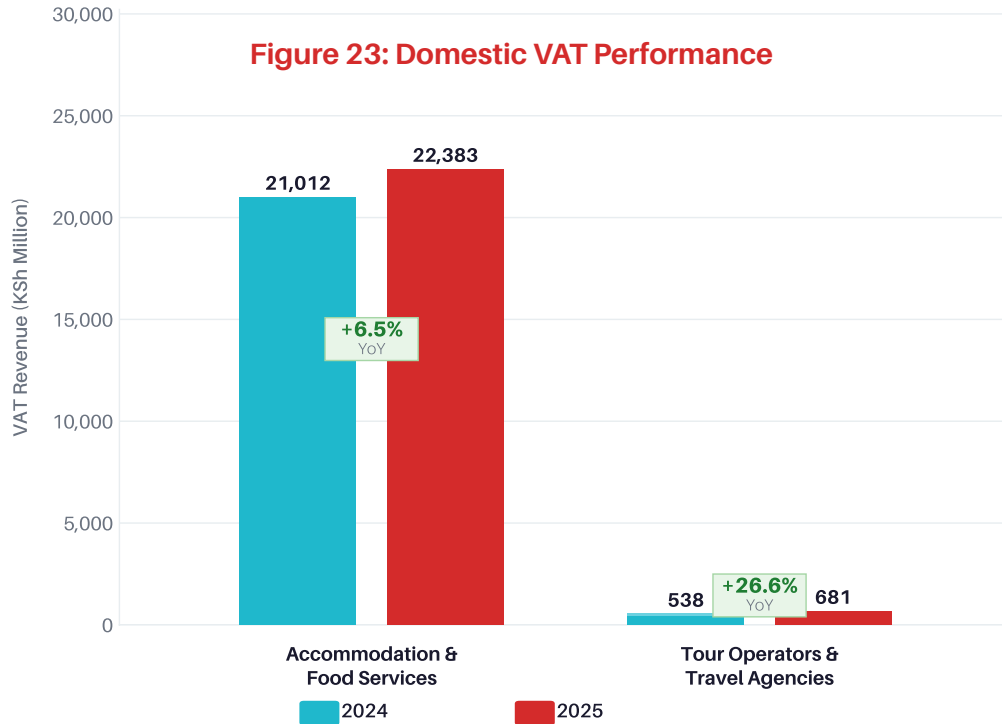


Source: Tourism Research Institute



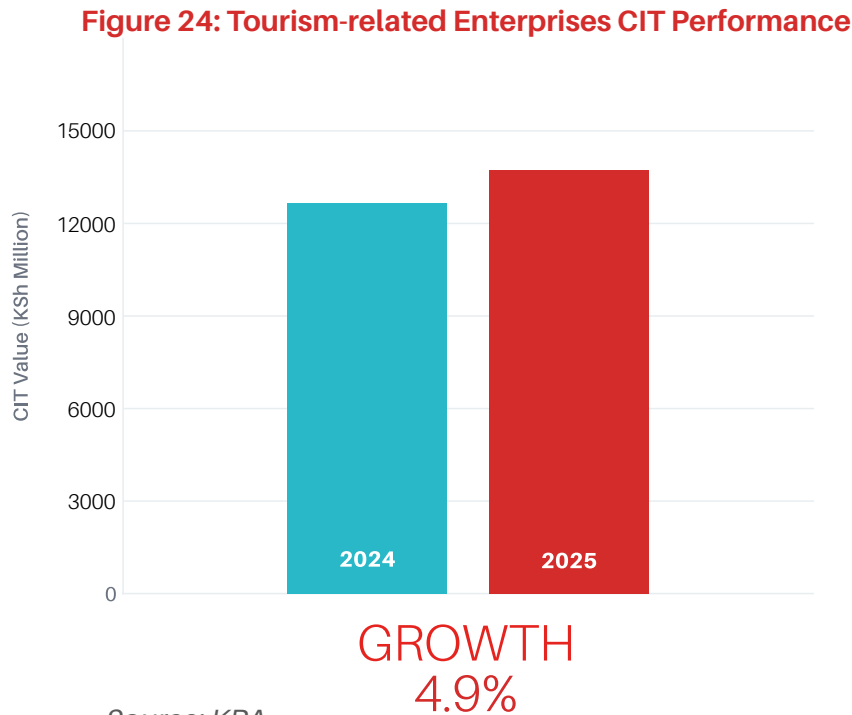
3.3 Tourism-Related Tax Revenues

Domestic VAT collections from Accommodation & Food Services grew 6.5% to Kshs. 22,383 million in 2025, up from Kshs. 21,012 million in 2024. Tour operators and Travel agencies recorded a growth of 26.6%, with collections rising to Kshs. 681 million in 2025 from Kshs. 538 million in 2024 as shown in Figure 23. This performance was driven by increased bookings during the festive season, growth in domestic tourism, and higher international visitor arrivals.



Source: KRA

In addition, the Corporate Income Tax (CIT) collections from the tourism-related enterprises grew by 4.9% to Kshs. 13,092 million from Kshs. 12,484 million in 2024. Though the accommodation enterprises faced competition from short-term rentals such as Airbnb with multiple mid-tier hotels being placed under receivership.



Source: KRA



04 | CHAPTER FOUR

ACCOMMODATION PERFORMANCE

4.0 Accommodation Performance



4.1 Bed Capacity

In 2025, the country's total bed capacity was 114,524. This spatial distribution of tourism bed capacity reveals a pronounced concentration pattern anchored in a few dominant destination clusters.

Kilifi, Mombasa, and Nakuru exhibit the highest accommodation intensity, reflecting the structural strength of the coastal tourism belt and the established safari circuit. Kwale and Narok form a second-tier high-capacity cluster, reinforcing the coast–Maasai Mara axis as a core pillar of Kenya's tourism economy.

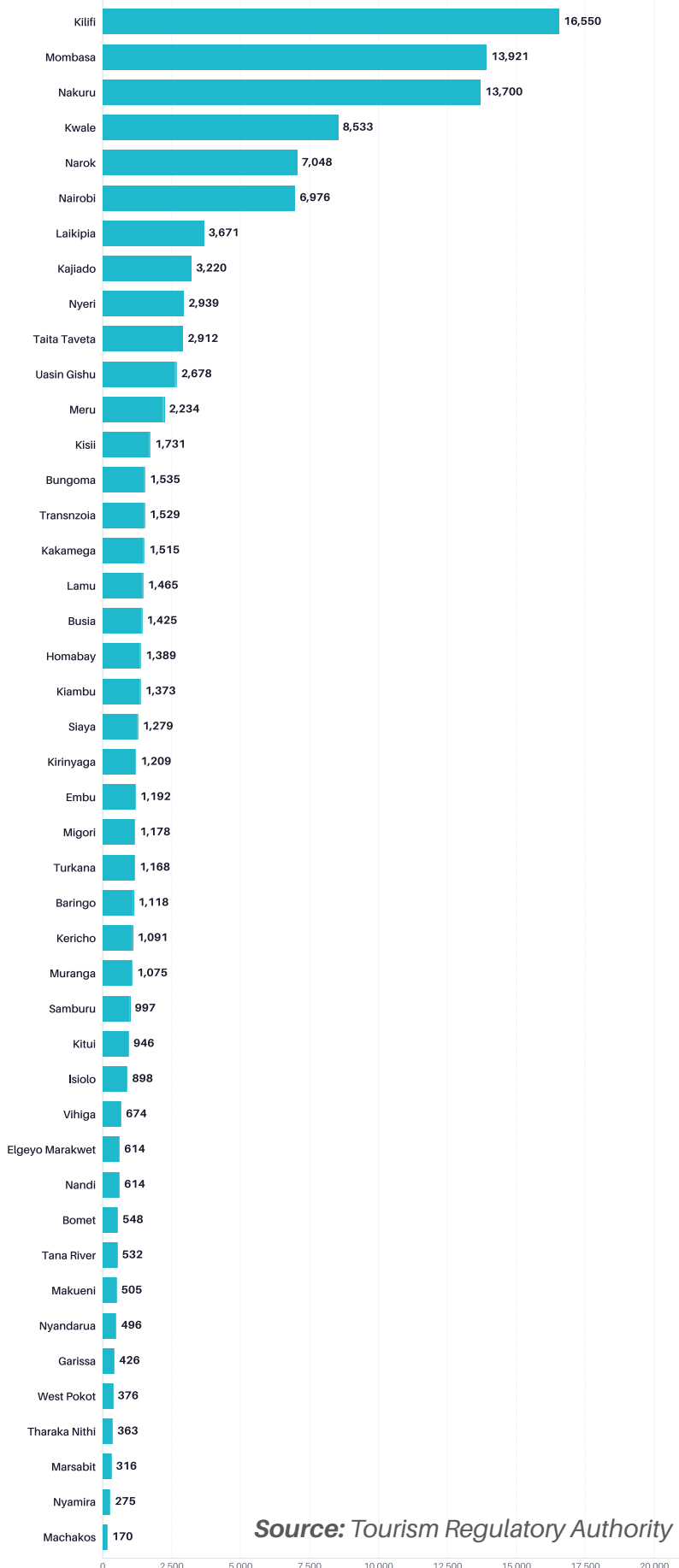
While Nairobi maintains significant capacity, it does not surpass the leading coastal counties, indicating that leisure-driven destinations continue to dominate over urban tourism. In contrast, northern frontier counties such as Marsabit, Garissa, West Pokot, and Tharaka Nithi display very low bed intensity, underscoring limited tourism infrastructure development.

Overall, the pattern demonstrates marked spatial inequality, with tourism capacity heavily concentrated in a small number of counties, suggesting both competitive strength in established hubs and developmental gaps in emerging regions.

Strategic policy direction should therefore promote calibrated spatial diversification — through targeted incentives, infrastructure investment, and destination development programs in under-capacity counties — while strengthening high-performing clusters to maintain international competitiveness.



Figure 25: Bed Capacity per County



Source: Tourism Regulatory Authority

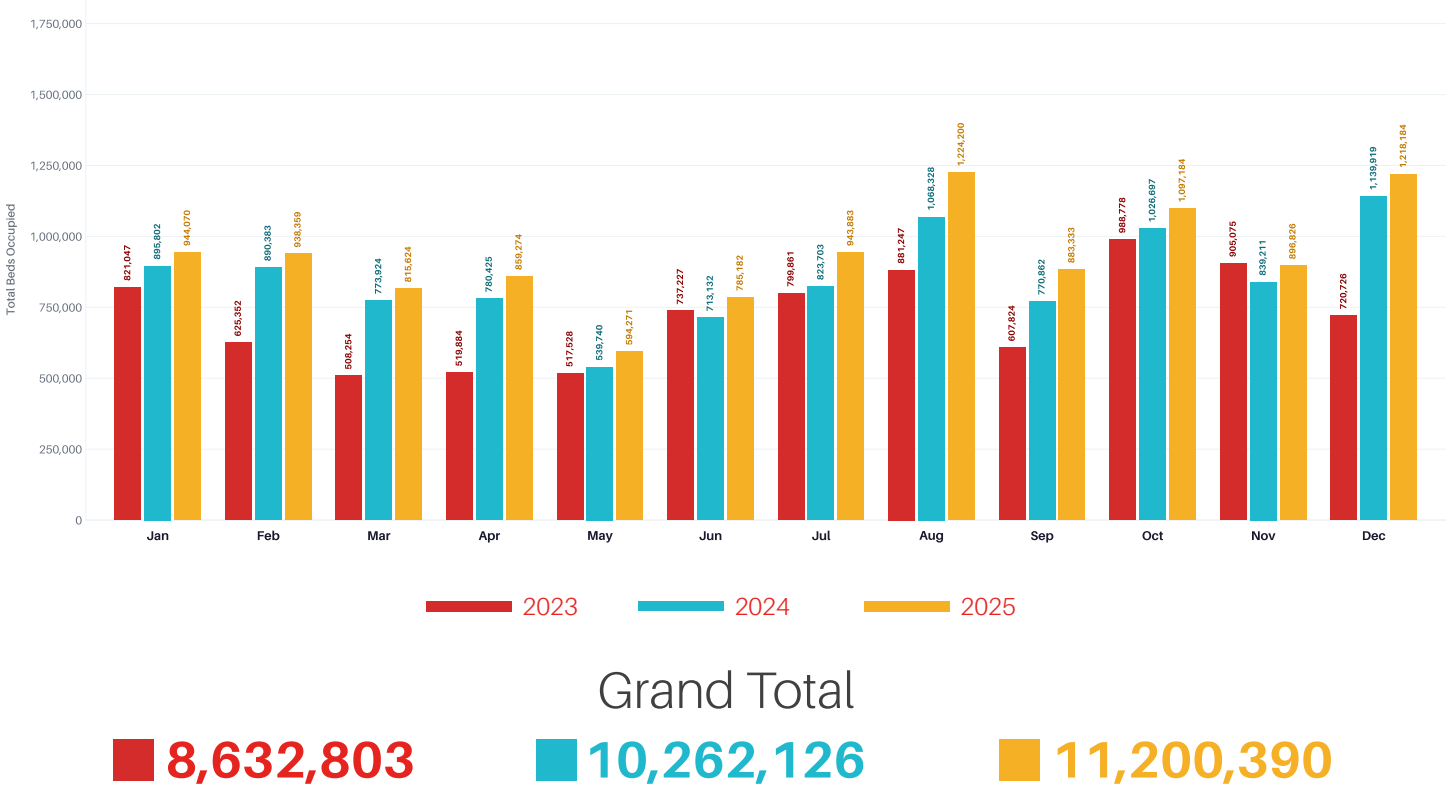


4.2 Bed Occupancy Total Beds Occupied (2023-2025)

The figure below shows the total number of beds occupied across three years: 2023, 2024, and 2025. The data reveals a general upward trend in bed occupancy over the three years, with a significant increase from 2023 to 2025. In 2023, the total beds occupied amounted to 8.6 million, which grew to 10.26 million in 2024, and reached a total of 11.2 million in 2025. Monthly variations indicate fluctuations in occupancy, peaking in the months of October and December each year.



Figure 26: Total Monthly Bed Occupancy



Source: KNBS
2025 | Provisional

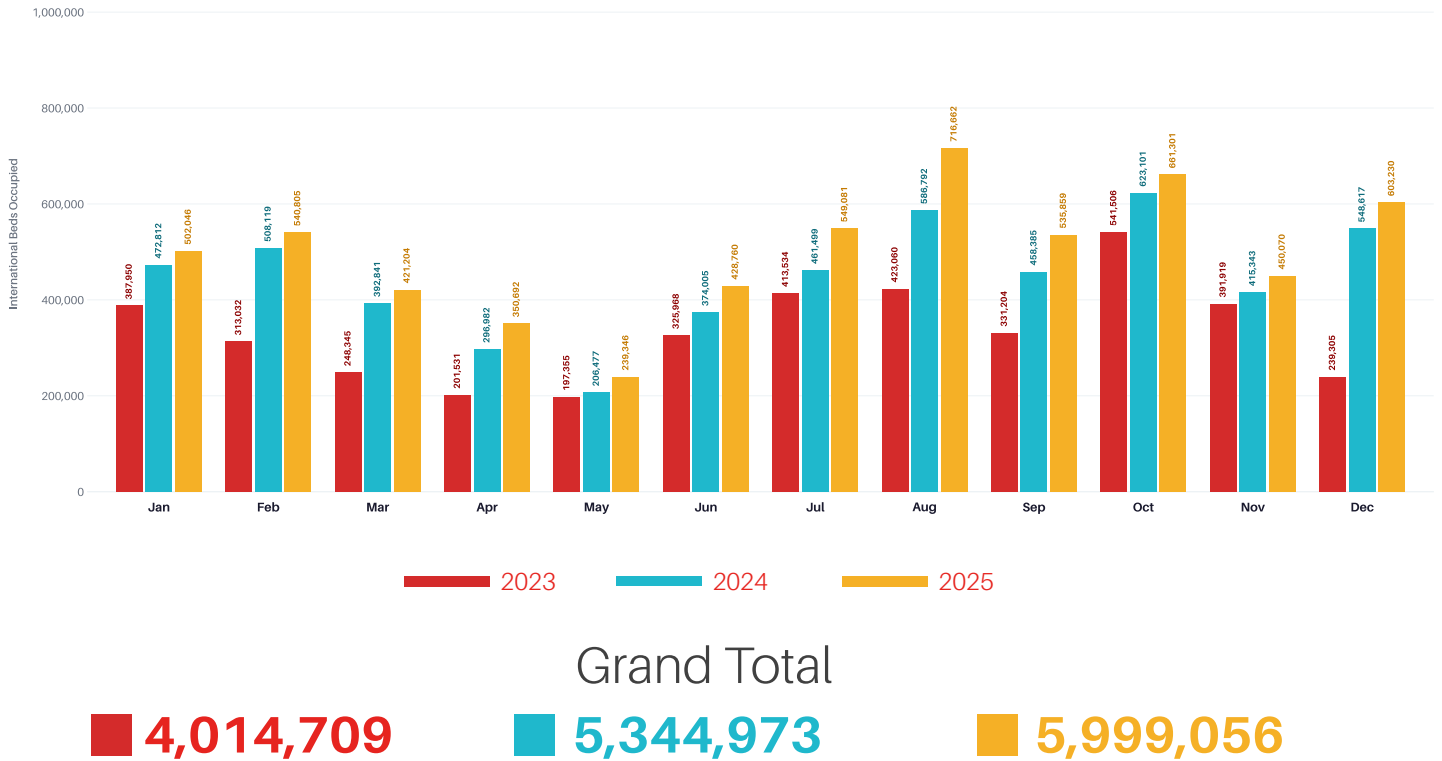


4.3 International Bed Occupancy (2023-2025)

This table tracks international bed occupancy over the same three-year period, highlighting similar growth patterns as the total occupancy. In 2023, the number of international beds occupied was approximately 4 million, which rose to 5.34 million in 2024, and further increased to 6 million in 2025. The monthly data reflects significant spikes in occupancy during the summer months, particularly from June to August, showing a trend in higher international travel and stay during these periods.



Figure 27: Monthly International Bed Occupancy



Source: KNBS
2025 | Provisional



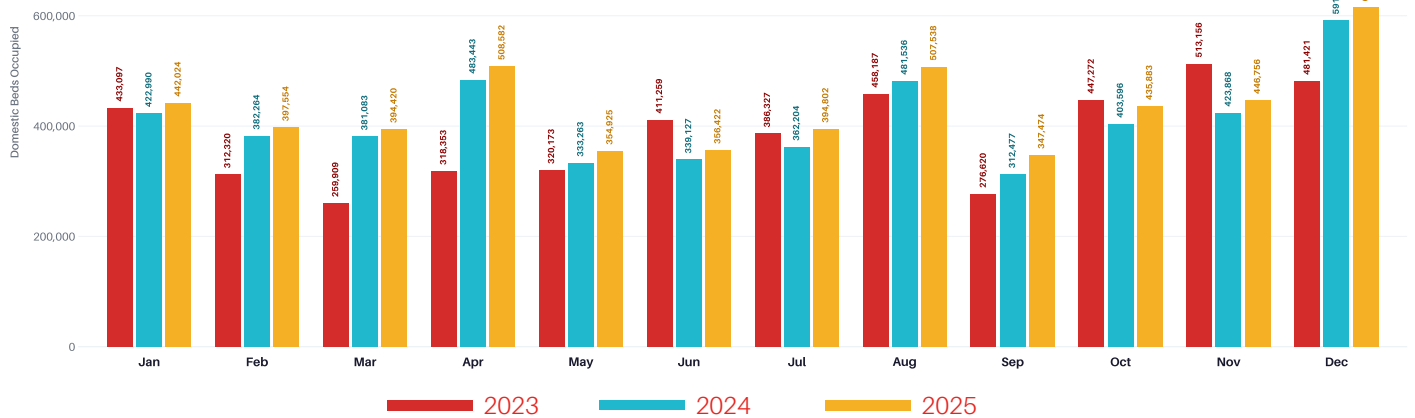
4.4 Domestic Bed Occupancy (2023-2025)

The domestic bed occupancy data reveals the number of beds occupied within the domestic market. Starting with 4.62 million in 2023, the numbers increased to 4.92 million in 2024 and reached 5.2 million in 2025.

As with international occupancy, there are peaks in the mid-year months, with significant rises observed in June, July, and August. However, domestic occupancy appears to have less dramatic fluctuations than international occupancy, indicating more consistent usage throughout the year.



Figure 28: Domestic Monthly Bed Occupancy



Grand Total

■ 4,618,094

■ 4,917,153

■ 5,201,334

Source: KNBS

2025 | Provisional





05 | CHAPTER
FIVE

MEETINGS, INCENTIVES,
CONFERENCES AND
EXHIBITIONS

5.0 Meetings, Incentives, Conferences and Exhibitions

In the year under review, the international visitors' arrivals on business and conference accounted for 25.2% (643,068) of the total visitors' arrivals.

5.1 Number of International & Local Delegates

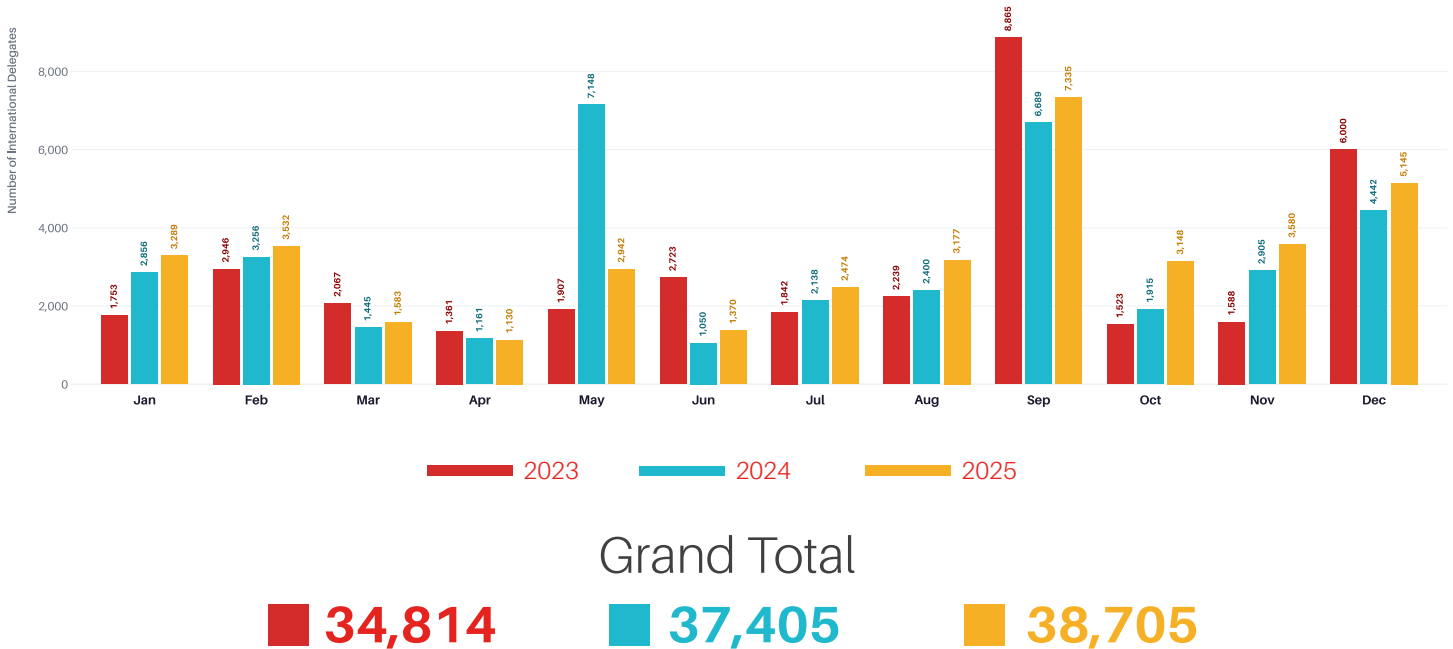
The number of international delegates rose to 38,705 in the year 2025 compared to 37,405 recorded in the previous year translating to a growth of 3.5% as shown in figure 29. There was notable increase in the number of international



delegates during the months of August to December 2025 because of high profile events. Some of the key meetings during the year were the International Tower Exchange, Global Off Grid Solar Forum and Expo, Africa Special Economic Zone

Annual Meeting, CAF Chan Draw, International Air Travel Association Ground Handling Conference (IGHC), Financing Agro-Food System (FINAS 2025 Summit) and the Africa Public Service Week.

Figure 29: Number of International Delegates, 2023 - 2025



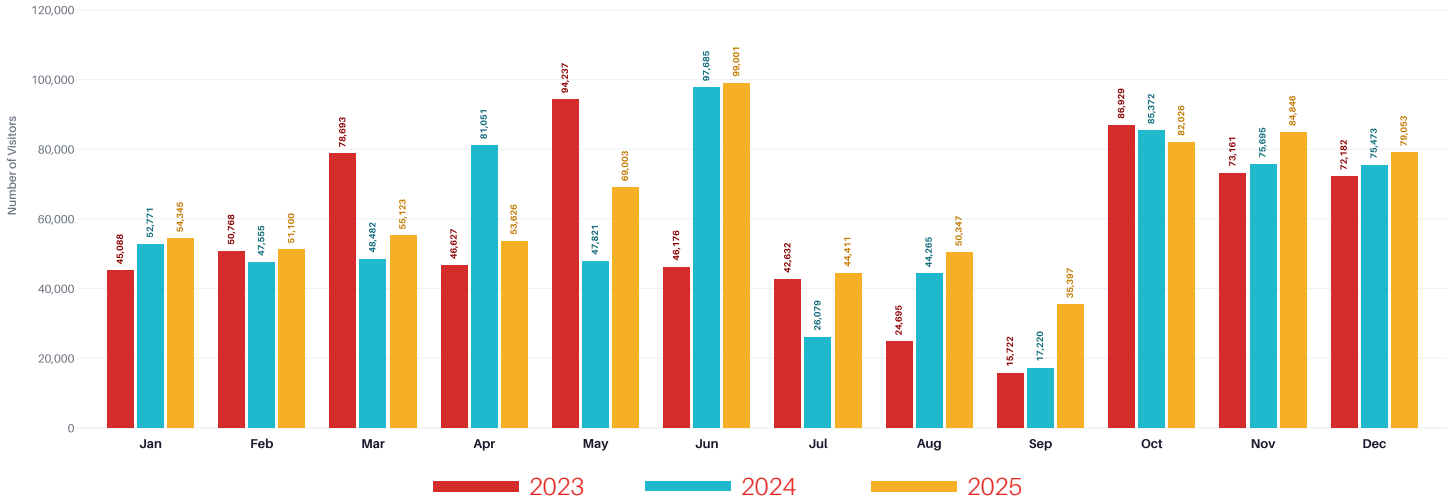
Source: KNBS

2025 | Provisional

The local delegates increased by 8.4% to stand at 758,278 in 2025 compared to 699,469 in 2024 as depicted in Figure 30. This was occasioned to high profile events that took place during the period under review.

Local Delegates increased by 8.4%

Figure 30: Number of local Delegates, 2023 - 2025



Source: KNBS

2025 | Provisional

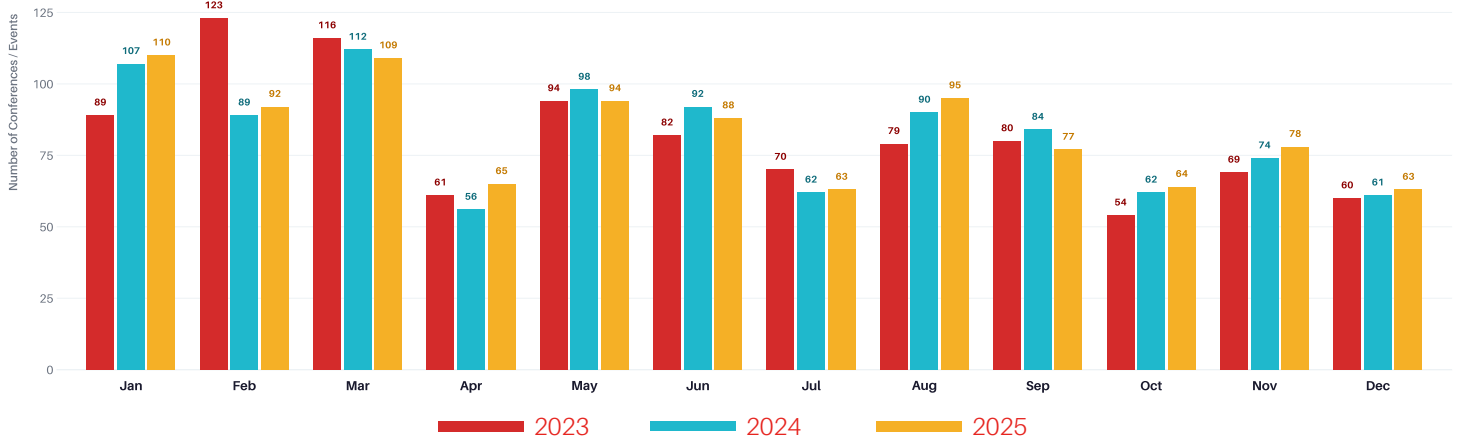
5.3 International and Local Conferences

The number of international conferences held in the country increased from 987 in the year 2024

to 998 in the year 2025 as recorded in figure 31. 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 31: Number of International Conferences, 2023 - 2025

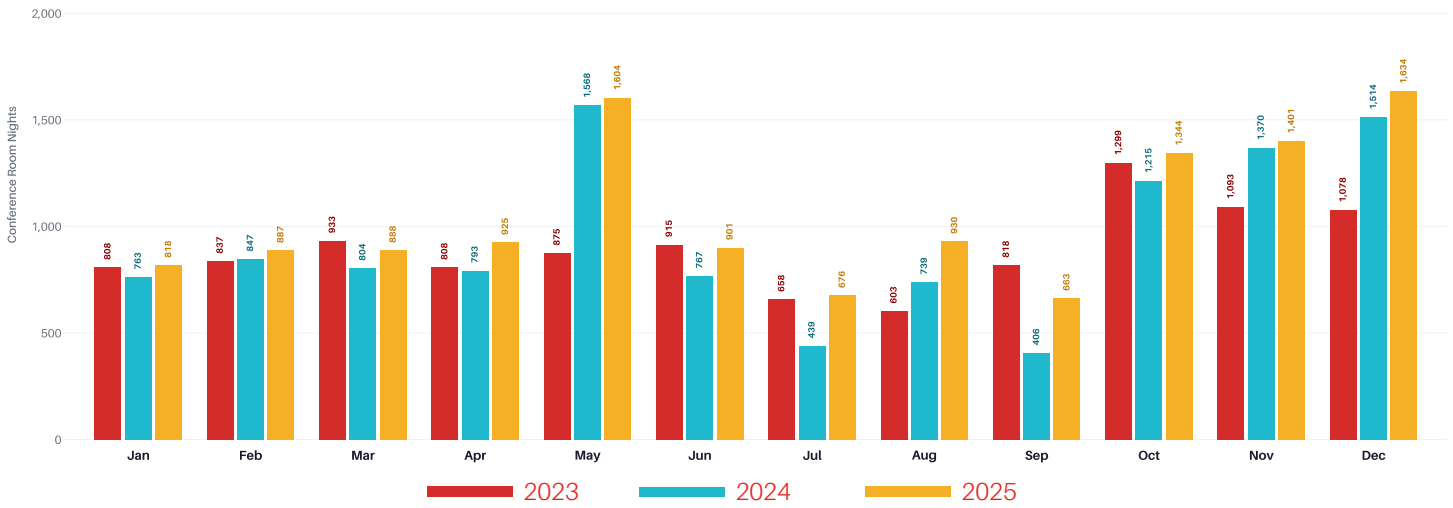


Source: KNBS

2025 | Provisional

The figure 32 shows the number of local conferences held in the country rose to 12,671 in 2025 from 11,225 that recorded in 2024. The increase was attributable to increased hosting of several high-profile local meetings in the Country.

Figure 32: Number of Local Conferences, 2023 - 2025



Source: KNBS
2025 | Provisional





06 | CHAPTER
SIX

VISITATION TO
NATIONAL PARKS



6.0 Visitation To National Parks

Table 8: Visitor Numbers to KWS Parks and Reserves in 2025 per visitor category

No.	Park/Reserve	Adult Citizen	Adult Residents	Adult Non-Residents	Child Citizens	Child Residents	Child Non-Residents	Total
1	Aberdares National Park	25,133	2,744	17,269	7,336	857	1,152	54,491
2	Amboseli National Park	76,888	5,446	176,921	18,571	1,296	16,799	295,921
3	Central Island National Park	213	49	102	3	5	5	377
4	Chyulu Hills National Park	699	41	310	391	141	41	1,623
5	Hell's Gate National Park	132,710	4,898	44,124	131,741	1,703	5,661	320,837
6	Kisite Marine National Park	2,976	409	235	2,427	138	285	6,470
7	Lake Nakuru National Park	43,778	2,083	38,154	9,973	596	5,320	99,904
8	Kisumu Impala Sanctuary	95,578	230	1,599	267,758	97	147	365,409
9	Kigio Nature Reserve	568	152	285	30	16	85	1,136
10	Lake Elementaita Wildlife Sanctuary	18,213	674	6,496	17,667	167	783	44,000
11	Lake Naivasha National Park	94,387	2,682	127,716	102,429	694	12,196	340,104
12	Marsabit National Park	17,421	586	6,711	8,054	122	941	33,835
13	Masai Mara National Reserve	7,825	104	363	1,650	5	44	9,991
14	Meru National Park	8,146	401	2,680	12,122	97	274	23,720
15	Mombasa National Park & Reserve	42,680	926	8,217	7,598	463	1,409	71,293
16	Mt Kenya National Park	6,541	356	335	6,238	44	39	13,563
17	Mt Longonot National Park	18,459	2,362	6,733	7,038	545	683	35,820

No.	Park/Reserve	Adult Citizen	Adult Residents	Adult Non-Residents	Child Citizens	Child Residents	Child Non-Residents	Total
18	Nairobi National Park	42,906	2,443	8,144	38,141	682	849	93,265
19	Mwea National Reserve	995	57	56	1,886	1	1	2,996
20	Narok National Reserve	16,928	655	6,207	263,408	101	1,003	438,866
21	Nairobi National Park (Alt Entry)	16,417	19,445	198,157	56,405	5,455	18,034	459,913
22	Nairobi Safari Walk	156,170	1,308	10,159	117,028	170	1,344	286,079
23	Ndere Island National Park	1,745	49	72	820	9	6	2,701
24	Ol Donyo Sabuk National Park	28,978	288	164	11,564	12	40	41,046
25	Ruma National Park	2,913	157	837	6,131	17	71	10,146
26	Saiwa Swamp National Park	1,794	52	146	1,933	7	20	3,952
27	Shimba Hills National Reserve	10,230	917	4,159	6,701	124	413	22,544
28	Sibilo National Reserve	249	92	43	51	4	5	444
29	South Island National Park	204	44	124	5	2	7	386
30	Tsavo East National Park	78,216	3,801	151,131	14,687	936	16,981	265,752
31	Tsavo West National Park	25,872	1,672	45,996	18,375	287	5,056	97,258
32	Watamu Marine Park & Reserve	32,016	4,042	46,206	6,698	920	7,720	97,602
TOTAL		1,308,503	59,004	908,050	1,154,858	15,724	97,414	3,543,553

Source: KWS

Table 9: Visitor Numbers to KWS Parks and Reserves in 2025 per Month

No.	Park/Reserve	Jan	Feb	March	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec	Total
1	Aberdares National Park	3,832	4,028	3,875	2,754	3,139	5,148	7,152	7,008	6,473	4,436	2,681	3,985	54,511
2	Amboseli National Park	18,756	22,919	15,892	12,192	11,600	26,121	46,640	49,014	33,609	26,871	15,261	18,117	295,901
3	Central Island National Park	44	40	14	91	8	29	61	42	19	0	9	20	377
4	Chyulu Hills National Park	110	112	141	129	131	128	146	105	94	224	160	243	1,723
5	Hell's Gate National Park	13,244	21,304	22,508	19,948	19,763	33,013	61,966	40,573	24,101	20,543	16,764	27,120	320,837
6	Kakamega Forest National Reserve	658	830	314	284	351	322	1,052	299	709	477	553	471	6,470
7	Kisite Marine National Park	8,546	7,836	6,001	7,246	2,793	4,760	8,768	13,431	7,578	9,038	9,094	14,819	99,904
8	Kisumu Impala Sanctuary	8,888	12,234	26,198	17,790	24,582	42,720	142,638	31,356	29,169	8,617	9,045	16,342	369,409
9	Kigio Nature Reserve	128	50	200	40	9	1	23	117	51	28	178	282	1,136
10	Lake Elementaita Wildlife Sanctuary	2,004	2,297	2,728	2,388	2,811	4,813	12,657	5,856	4,706	1,686	699	1,876	44,000
11	Lake Nakuru National Park	14,891	16,981	16,006	15,207	18,286	41,997	88,072	54,518	25,664	19,617	11,664	16,761	340,054
12	Malindi Marine Park	2,844	1,898	1,804	3,492	1,004	1,808	2,489	5,250	2,167	2,128	2,861	6,100	33,835
13	Masai Mara National Reserve	514	629	548	683	939	958	1,107	1,031	997	750	647	1,193	9,991
14	Meru National Park	1,148	1,116	1,773	1,080	1,391	1,758	5,253	3,924	2,678	1,367	924	1,308	23,720
15	Mombasa National Park & Reserve	5,409	4,266	4,009	7,040	2,810	4,281	5,580	10,613	4,228	2,563	7,008	12,236	71,292
16	Mt Kenya National Park	743	1,244	1,857	573	1,005	1,593	2,588	521	611	549	495	1,884	13,663
17	Mt Longonot National Park	2,085	2,182	3,541	1,584	1,759	2,642	3,697	4,347	3,764	2,265	2,542	4,329	35,820
18	Nairobi National Park	3,894	5,898	7,583	5,229	5,064	8,907	19,968	12,737	7,323	7,067	4,970	5,015	93,265
19	Mwea National Reserve	172	183	90	97	58	124	954	332	362	223	156	235	2,996

No.	Park/Reserve	Jan	Feb	March	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec	Total
20	Narok National Reserve	21,562	16,250	24,998	31,802	22,666	49,181	120,387	43,947	42,981	16,872	17,414	29,986	438,866
21	Nairobi National Park (Alt)	34,386	33,215	33,523	33,343	32,450	45,572	52,181	52,744	43,059	33,052	28,753	57,685	459,913
22	Nairobi Safari Walk	18,411	12,643	15,135	19,503	17,838	28,433	47,460	29,341	36,535	13,079	17,944	29,277	286,079
23	Ndere Island National Park	116	128	198	342	233	448	502	144	152	90	134	214	2,701
24	Ol Donyo Sabuk National Park	4,023	2,592	3,067	2,855	3,097	3,274	4,907	4,721	3,729	3,324	2,603	2,674	41,046
25	Ruma National Park	343	176	992	395	398	1,233	2,685	1,510	746	632	512	524	10,146
26	Saiwa Swamp National Park	278	289	250	368	85	256	309	250	852	73	229	723	3,962
27	Shimba Hills National Reserve	1,544	1,389	1,600	1,362	760	1,937	3,321	3,231	1,691	1,496	1,943	2,600	22,544
28	Sibiloi National Reserve	12	62	42	26	38	30	64	38	76	24	25	444	
29	South Island National Park	49	33	2	16	19	42	63	65	25	2	0	40	386
30	Tsavo East National Park	26,887	28,453	22,062	11,581	5,499	12,612	28,450	36,287	23,688	22,777	21,476	25,830	265,752
31	Tsavo West National Park	7,496	8,822	7,137	4,169	3,184	6,154	14,830	13,975	8,766	8,634	5,730	6,361	95,258
32	Watamu Marine Park & Reserve	11,522	10,318	8,887	5,641	1,622	2,080	6,069	11,625	8,225	8,010	8,557	15,286	97,602
—	TOTAL	214,558	221,417	232,493	210,266	186,020	332,572	690,954	437,987	324,595	217,566	191,010	284,115	3,543,553

Source: KWS

6.1 Tourism Performance In 2025 In Comparison To 2024 KWS Parks, Reserves & National Wildlife Sanctuaries.

The period under review (2025) registered a total of 3,543,553 visitors to KWS Parks, Reserves and National Wildlife Sanctuaries. In 2024, the total number of visitors recorded was 3,201,102. This marked a growth of 11% in 2025 as compared to 2024.

Remarkable growth in the international market was noted as it grew from 853,511 visitors in 2024 to 1,005,464 visitors in 2025 which represents 18% increase. The highest number of international visitors' entry to KWS parks,

reserves and sanctuaries (150,628) was recorded in August 2025. Cumulatively, the highest number of non-residents visited Nairobi National Park followed by Amboseli, Tsavo East, Lake Nakuru and Watamu Marine Park respectively. Domestic visitors (citizens and residents) marked a growth of 8% from 2,347,591 in 2024 to 2,538,089 visitors in 2025.

The overall 11% increase in visitation was primarily supported by strong growth in the international market (18%) and the sustained expansion

in domestic visitation (8%). Even though there was a general growth in domestic tourists, their number plunged during the last quarter of the year as a result of introduction of the reviewed conservation fees in July 2025.

Below are summary figures showing tourism performance in KWS parks, reserves and sanctuaries during the year in review.

Figure 33: Domestic Visitors (Citizens & Residents)

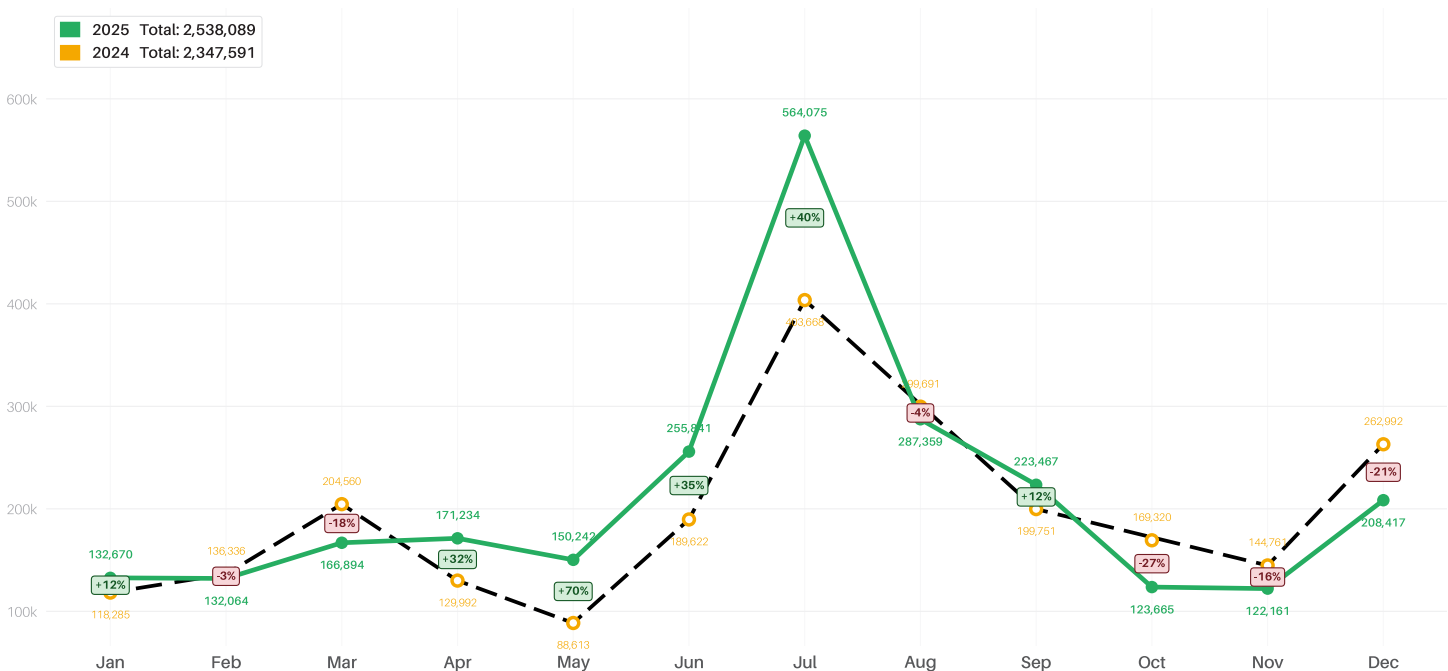


Figure 34: International Visitors (Non-Residents)

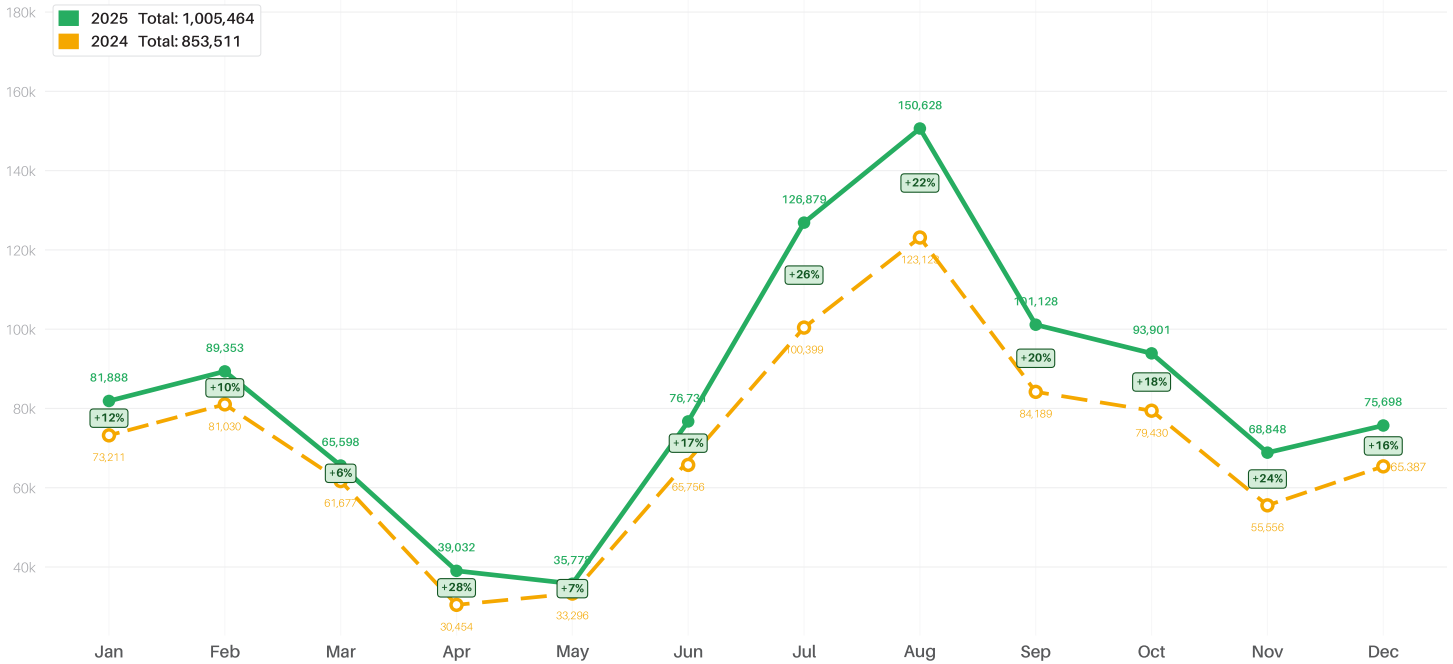
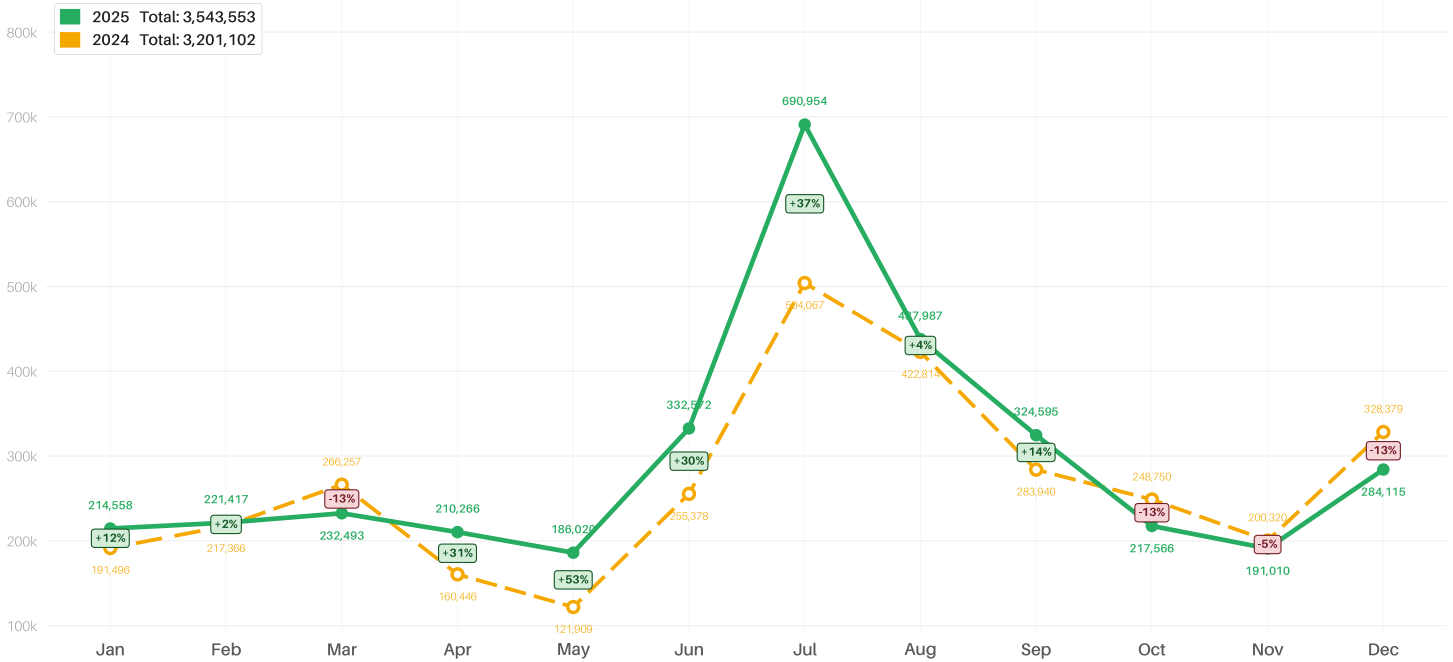


Figure 35: Total Visitors



6.2 Highlights Of Major Programmes & Other Related Activities Undertaken In 2025 Which Boosted Visitor Numbers to KWS Parks/Reserves & Sanctuaries

In 2025, the Kenya Wildlife Service (KWS) implemented several major programs and activities aimed at increasing visitor number to its national parks, reserves

and sanctuaries. These include strategic partnerships, high-impact marketing, awareness campaigns and capacity building within the tourism sector.

Here's a breakdown: -

a. High-Impact Marketing & Awareness Campaigns



Targeted Market Campaigns

Executed targeted marketing campaigns custom-made to specific demographics, focusing on high-value international segments and emerging domestic travelers e.g. ShikishalnKenyaParks.



Aggressive Digital Marketing

Leveraged on targeted social media advertising and influencer collaborations to maintain top-of-mind awareness.



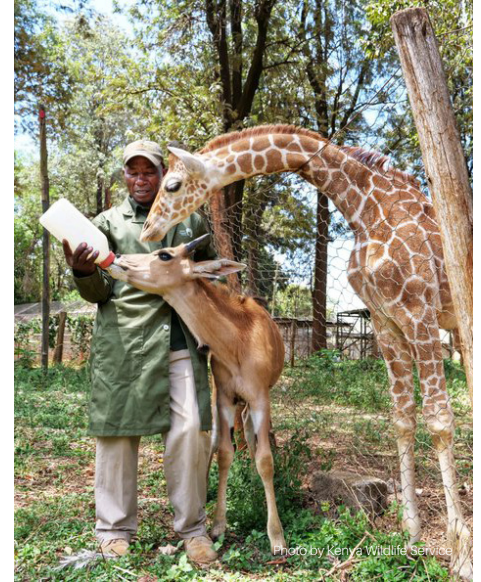
Promotional Free Entry Initiative

Implemented a special free entry Campaign that enabled over 80,000 Kenyans to access national parks during the Jamhuri Day Holiday.



Content Creation

Produced high quality, immersive visual storytelling including virtual tours to showcase the uniqueness, diversity and richness of Kenya's park experiences.



b) Strategic Partnerships & Trade engagements and Market Activation



Collaborative Stakeholder Synergies

Partnerships with the Kenya Tourism Board (KTB), Travel Operators and Agents Associations and various Foreign Embassies to align Kenya Parks offerings with global travel trends.



Global and Local Exhibition

Maintained a high-profile presence at premier international travel fairs (such as ITB Berlin 2025, MKTE 2025 and Uganda Tourism Conference) and local exhibitions to secure B2B contracts and stimulate B2C interest.



Travel Trade Engagements

Engaged travel agents and international trade partners during MKTE 2025, the Uganda Kenya Coast Conference, and FAM Trips in October. Additional engagement was undertaken during the MV Diana Cruise Ship visit in October, targeting international guests and cruise tourism markets.



Mall Activations, Corporate Engagements and School Outreach

Implemented direct public engagement campaigns through mall activations, corporate partnerships and school outreach programs to stimulate domestic interest and conservation awareness.



Tourism Promotion & Integrated Activities

Packaged and promoted adventure tourism products in the Cinematic maze (including parks such as Mt. Longonot, Mt. Elgon and Marine Parks) during Jamhuri Week.



Collaboration with tour operators in opening up Chogoria route in Mt Kenya National Park.

c) Capacity Building & Destination Management



Empowering the Tourism Stakeholders

Conducted comprehensive training programs for tour guides, operators and travel agents. This ensured that the “frontline” of the industry possessed deep knowledge of KWS products and experiences, leading to improved visitor conversion and satisfaction.



Event-Driven Park Visitation

Transformed National Parks into versatile lifestyle venues by hosting and participating in high-profile sporting events such as Magical Kenya Trails, cultural festivals, drawing non-traditional audiences to the wild.

The Service undertook several fam trips targeting travel trade with a view of highlight underutilized parks.

d) Conservation Fees Review & Pricing Study

KWS, for the first time in 18 years, undertook a comprehensive review of conservation fees to ensure sustainable financing for conservation. The exercise was supported by a structured Pricing Study aimed at assessing the adequacy, competitiveness and long-term sustainability of the existing fee framework. The review was guided by evidence-based analysis and broad stakeholder consultation, ensuring that reviewed pricing remained market-responsive while strengthening conservation financing.

The key components of the review included:



Inclusive Stakeholder Engagement: By incorporating stakeholder feedback, the revised pricing structure balanced affordability with sustainability, maintaining visitor confidence and minimizing resistance to fee adjustments.



Competitive Benchmarking and Financial Review: Aligning conservation fees with regional standards enhanced Kenya’s competitiveness as a wildlife destination, supporting continued growth in both domestic and international visitation.



Elasticity Analysis and Structured Pricing Options: Data-driven pricing minimized demand shocks, preserved affordability across segments and supported the observed increase in visitor numbers.

These combined efforts made national parks, reserves and sanctuaries more accessible, attractive, and sustainable, contributing significantly to the growth in tourism within KWS managed Parks.

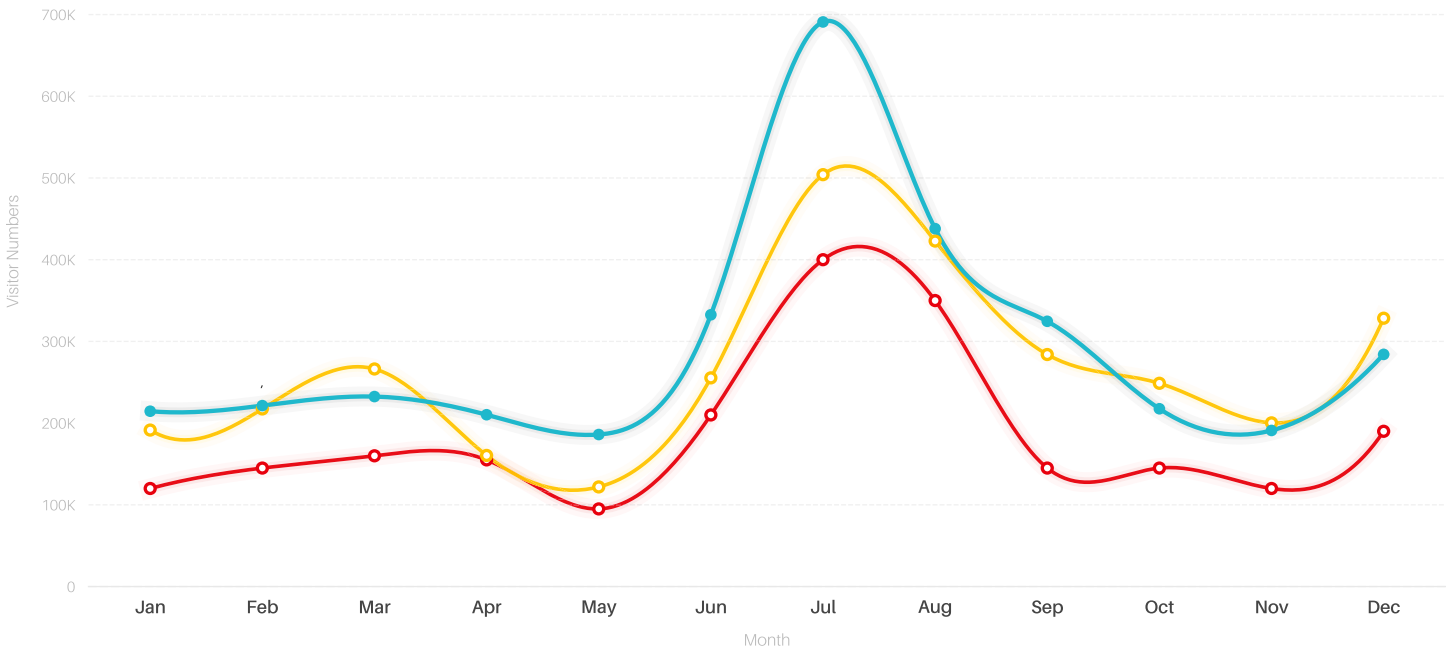
Photo by Kenya Wildlife Service

6.3 Outlook for 2026

Kenya’s tourism sector has demonstrated remarkable resilience and growth in recent years, significantly contributing to the nation’s economy. The travel trends for 2026 are projected to grow beyond the 2025 figures based on the sector’s performance in 2025 and 2024 (Figure below) as the industry has exhibited resilience post covid-19 coupled with targeted investments in

tourism facilities. Kenya’s tourism sector is on a positive trajectory, with strategic plans and innovative initiatives poised to drive further growth and sustainability in the coming years. It is projected that domestic and international markets will grow by more than 10% and 20% respectively compared to 2025.

Figure 36: Total Visitors Monthly Trend 2025 vs 2024 & 2019



In 2026, the Kenya Wildlife Service (KWS) will strengthen implementation of its 2024–2028 Strategic Plan, with a strong focus on a conservation-led economy that drives tourism growth, strengthens community participation and ensures long-term financial sustainability. The year will be characterized by increased use of technology, strategic partnerships and diversified tourism and marketing approaches.

01

Technology-Driven Conservation & Marketing

KWS is partnering with the Global Conservation Tech & Drone Forum (GCTDF) 2026 to leverage advanced technologies such as drones, artificial intelligence and satellite sensors to enhance anti-poaching efforts, habitat protection and digital marketing. This will help in positioning Kenya as a global leader in conservation innovation.

02

Strategic Growth under the 2024–2028 Plan:

KWS will continue to position wildlife conservation as a key economic driver by promoting sustainable tourism models that directly benefit local communities.

03

Financial Sustainability & Revenue Growth:

Building on a reported 43% increase in revenue, KWS will pursue greater self-sufficiency by expanding digitized services, enhancing tourism products, and reducing dependence on exchequer funding.

04

Product Diversification & Park Promotion:

Marketing efforts will prioritize promoting under-utilized and niche parks, including adventure and special-interest destinations, through targeted campaigns tailored to diverse visitor segments.

05

Operational & Capacity Enhancements:

KWS will continue recruiting and training rangers in early 2026, alongside investments in infrastructure and operational capacity to improve service delivery and conservation outcomes.

06

Strategic Partnerships & Global Collaboration

Collaboration with international stakeholders and conservation partners will be strengthened to advance eco-tourism, conservation financing and global visibility.

07

Branding, Fundraising & Youth Engagement

KWS will enhance corporate branding, explore branded merchandise and utilize targeted events for fundraising, while actively engaging youth and local communities to build long-term conservation support.

2026 OUTLOOK

Overall, the 2026 outlook reflects KWS's commitment to modernizing conservation operations, increasing revenue and improving community livelihoods while safeguarding Kenya's rich biodiversity.



Photo by Kenya Wildlife Service

A photograph of a modern architectural interior. In the foreground, a grey concrete bench sits on a light-colored tiled floor. To the right, a black suitcase is partially visible, with a hand holding its handle. The background features a large glass wall with a grid pattern, through which a blue sky and other buildings are visible. The overall scene is bright and clean, with a focus on geometric shapes and materials.

07 | CHAPTER SEVEN

INITIATIVES SUPPORTING SECTOR
PERFORMANCE IN 2025



7.1 Initiatives Supporting Sector Performance in 2025

Marketing and Promotion Efforts

The promotional activities implemented over the period were aimed at positioning Kenya as a year-round tourism destination by highlighting a variety of unique experiences. These included digital marketing awareness and conversion campaigns to raise awareness and encourage bookings, collaborative efforts with online travel agencies, participation in International trade shows, and strategic alliances with stakeholders across both the tourism and non-tourism sectors. Kenya also pursued domestic promotion through initiatives such as the Tembea Kenya Campaign, implemented in partnership with the private sector, alongside festivals such as the Maa Festival, Tobonglore, and the Lamu Cultural Festival.

Product Development and Diversification

Efforts during the period were concentrated on the enhancement of existing products and the systematic mapping of new products and experiences across the counties, aiming to identify and develop niche offerings with the goal of diversifying beyond traditional and beach-related attractions. The period saw the launch of the medical and wellness product, alongside the introduction of adventure and Blesisure product clubs, designed to foster greater private-sector involvement in product development. Kenya also focused on hosting the Africa Cup of Nations (AFCON) and participating in year-round marathons as strategic opportunities to diversify the destination offering

Diversification of Source Markets

In line with the BETA tourism priorities, which emphasize diversifying source markets—particularly within Africa, a concerted effort was made to identify and develop new markets. Specifically, in Africa, focus was placed on Ghana and Nigeria. Additionally, other new markets prioritized during this period included Brazil, Mexico, Poland, and Australia, which have shown the highest growth rates over the past two to three years.

Events and MICE

KICC modernization improved the facilities for hosting events. Key events during this period, contributing towards increased International arrivals, included the UNEA Conference, International Tower Exchange, Global Off-Grid Solar Forum & Expo, Africa SEZ Annual Meeting, CAF Chan Draw, IGHC, FINAS 2025 Summit, and Africa Public Service Week. In 2025, the development of the Bomas International Convention Complex was initiated, aimed at increasing MICE capacity in Kenya.

New Airlines

In 2025, Kenya's aviation landscape underwent a transformative expansion, characterized by a strategic entry of new scheduled services and significant frequency increment that strengthened global connectivity. Middle Eastern carriers led this growth, with Etihad Airways doubling its Abu Dhabi–Nairobi service to 14 weekly flights and Qatar Airways adding a third daily frequency via an enhanced codeshare with Kenya Airways. New market entrants like flynas (Riyadh), Gulf Air (Bahrain), and flydubai (Dubai) established critical direct links to the Gulf, while TAAG Angola Airlines and Flightlink strengthened intra-Africa and regional East African networks. Furthermore, the national carrier, Kenya Airways, expanded its UK footprint by launching a new service to London Gatwick, bringing total weekly flights to the United Kingdom to approximately ten.

The coastal tourism circuit received a massive boost through government-approved charter operations, which saw international traffic into Mombasa increase to approximately 22 weekly charters during peak periods, a more than 100% increase from previous seasons. A key milestone was the KCAA's approval for TUI fly Netherlands, which initiated twice-weekly Boeing 787 service from Amsterdam to Mombasa starting in November 2025. This momentum culminated in late December with the arrival of inaugural charter flights from emerging Eastern European markets, specifically Budapest

(Hungary) and Bucharest (Romania), via Smartwings and Romanian charter operators. These targeted leisure flights bypass traditional hubs, delivering holidaymakers directly to the coast and serving as a primary driver for the region's international visitor growth.

eTA

Introduction of Electronic Travel Authorisation (eTA) in 2024 has enhanced tourism by simplifying entry through a fully online and faster pre-travel approval process, thereby reducing travel barriers and improving the country's competitiveness as a tourist destination. It has improved visitor experience through shorter processing times and smoother border clearance, encouraging increased tourist arrivals. Additionally, the eTA provides valuable advance traveller data for informed tourism planning and marketing, strengthens security through pre-screening and reinforces Kenya's position as a safe, modern, and regionally connected tourism hub.







08 | CHAPTER EIGHT

TOURISM PROJECTIONS AND TRENDS

8.1 Tourism Projections & Trends

Global tourism continued its recovery in 2025, with international arrivals surpassing 1.5 billion and demonstrating resilience despite economic and geopolitical challenges. According to United Nations World Tourism Barometer January 2026, the sector is projected to grow steadily in 2026, although at a moderated pace compared to the rapid rebound witnessed post-pandemic. Based on current trends, expert sentiment, and key industry indicators, international tourist arrivals are projected to expand by 3% to 4% in 2026. Growth will be underpinned by improving mobility, persistent demand, major global events, and continued recovery in key regions, but moderated by economic headwinds, travel costs, and geopolitical risks.

The 2025 Tourism Performance Report Serves As A Structured And Evidence-Based Tool For Monitoring Kenya's Tourism Sector, Providing Timely Insights Into Visitor Flows, Tourism Earnings, And Overall Sector Performance.



8.2 Projections 2026-2030

The Forecast was determined using a spreadsheet-forecasting tool. The forecasting ranged between the years 2026 to 2030 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 inflation rate of 4.075 for 2025.

Table 10: Projections 2026-2030

Inbound Arrivals	Year	2023	2024	2025	2026	2027	2028	2029	2030
Upper Limit	Total	2,138,649	2,474,551	2,652,540	2,979,040	3,235,985	3,492,931	3,749,876	4,006,822
Average Limit	Total	2,138,649	2,474,551	2,652,540	2,935,804	3,192,750	3,449,695	3,706,641	3,963,586
Lower Limit	Total	2,138,649	2,474,551	2,652,540	2,892,569	3,149,514	3,406,460	3,663,405	3,920,351

Inbound Receipts	Year	2023	2024	2025	2026	2027	2028	2029	2030
Lower Limit	Total	378,699,534,490	453,496,637,246	501,339,603,578	532,305,834,909	577,861,125,871	623,008,930,271	667,642,139,953	711,710,201,959
Average Limit	Total	378,699,534,490	453,496,637,246	501,339,603,578	549,986,070,592	595,888,040,179	641,790,009,765	687,691,979,352	733,593,948,939
Upper Limit	Total	378,699,534,490	453,496,637,246	501,339,603,578	567,666,306,274	613,914,954,486	660,571,089,260	707,741,818,751	755,477,695,919



8.3 Major Trends Shaping Global Travel in 2026

Tourism in 2026 is being transformed by rapid technological change, growing sustainability imperatives, shifting traveller preferences, and evolving policy and governance frameworks. Together, these forces are redefining how tourism is developed, managed, and experienced worldwide.



Digital Transformation & Smart Technologies

Tourism is becoming increasingly digital, with artificial intelligence (AI) and smart technologies playing a central role. Generative AI, digital assistants, and automated platforms now enable travellers to plan, customize, and book trips within seconds, while tourism businesses are using AI to enhance personalization, efficiency, and customer engagement.

Broader “Tourism 4.0” developments—including the Internet of Things, blockchain applications, and immersive technologies—are enabling more integrated and seamless travel journeys.

Virtual and metaverse-based tourism experiences are also emerging, allowing digital exploration of remote or environmentally sensitive destinations and offering potential environmental benefits by reducing some physical travel demand. However, adoption rates vary widely, creating a gap between technology frontrunner’s and destinations that struggle to keep pace.



Sustainability, Resilience, & Preparedness

Climate change remains one of the most significant challenges facing global tourism. The sector has made progress in reducing emissions intensity, with global tourism-related greenhouse gas emissions falling below pre-pandemic levels despite continued economic growth.

Improvements in energy efficiency and increased use of renewable energy have supported this partial decoupling of growth from emissions. Nevertheless, rising temperatures, biodiversity loss, ecosystem degradation, and increasing frequency of extreme weather events continue to pose serious risks, particularly for small island developing states and coastal destinations. In response, many destinations are investing in climate-resilient infrastructure, regenerative tourism models, conservation efforts, and low-carbon transport solutions, while governments and consumers alike are placing greater emphasis on environmental responsibility and sustainable practices.



Innovation In Green Technologies

Advances in green technologies are accelerating sustainability transitions across the tourism sector. Innovations in renewable energy, resource-efficient infrastructure, waste management, and low-emission transport are helping destinations and businesses reduce environmental impacts and adapt to climate challenges.

However, uneven adoption of these technologies means that progress toward sustainable tourism varies significantly across regions and destinations.

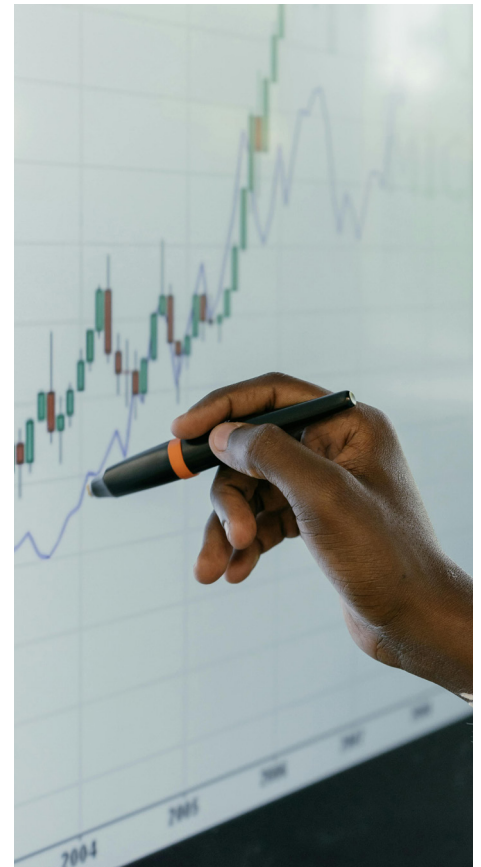


Changing Traveller Behaviour & Demographics

Traveller preferences continue to evolve, particularly among younger generations. Millennials and Generation Z increasingly prioritize meaningful, personalized, and values-driven experiences, including cultural authenticity, wellness, and local engagement.

Blended work-and-leisure travel has become more common, with many travellers extending business trips for leisure purposes. There is also growing demand for multigenerational travel, event-based tourism, off-peak travel, and flexible booking options.

At the same time, tourist behaviour is increasingly diverse and sometimes contradictory: while many seek immersive and responsible experiences, others continue to prioritize leisure and entertainment over cultural or environmental considerations.





Economic & Geopolitical Influences

Global economic growth is expected to remain modest in 2026, shaping travel demand and spending patterns.

In this context, tourism continues to play a stabilizing role by supporting employment, generating foreign exchange, and stimulating local economies, particularly through small and medium-sized enterprises. Key uncertainties include exchange rate volatility, energy prices, inflation, and consumer confidence. Geopolitical instability, conflicts, and protectionist tendencies continue to affect travel flows, safety perceptions, and supply chains.

At the same time, expanding middle classes and rising outbound tourism from emerging markets—particularly in Asia—present significant growth opportunities for destinations worldwide.



Regulatory & Policy Developments

Travel policies are increasingly focused on facilitation and efficiency. Many destinations are expanding e-visa systems, visa waivers, and digital border management solutions to improve accessibility and competitiveness. The use of biometric systems and digital identities is becoming more widespread, reflecting growing traveller expectations for seamless and secure travel processes.

At the same time, concerns about over-tourism and environmental degradation are prompting some destinations to introduce visitor caps, environmental levies, and stricter regulatory controls to ensure sustainable destination management.



Managing Tourism Growth & Visitor Flows

As tourism demand continues to grow, there is increasing emphasis on managing visitor flows to avoid congestion, environmental stress, and uneven distribution of benefits. Targeted policies and planning approaches are being developed to promote balanced tourism development, support local communities, and ensure that economic and social benefits are shared more equitably across regions and seasons.



Safety, Security, and Cyber Risks

Safety and security—both physical and digital—remain critical factors influencing destination choice. Geopolitical tensions, conflicts, and regional instability can disrupt connectivity, affect traveller confidence, and alter travel regulations. At the same time, rising cybersecurity risks pose new challenges for tourism systems and infrastructure, as large-scale cyber incidents could significantly disrupt operations and traveller trust.



Infrastructure & Resource Constraints

Investment in transport, digital connectivity, and supporting infrastructure is essential to enhance mobility, accessibility, and competitiveness. At the same time, tourism places growing pressure on natural resources such as land, water, energy, and biodiversity. Resource scarcity and environmental limits are increasingly shaping tourism planning, investment decisions, and destination carrying capacity assessments.



Labour Market Transformation

The tourism labour market is undergoing significant change. Many destinations face labour shortages and skills gaps, particularly in digital technologies and sustainable tourism management. Elsewhere, unemployment and underemployment persist, highlighting the need for reskilling and workforce adaptation in response to digitalization and automation.



Governance & Coordination

Tourism is a complex system that requires strong coordination across sectors, policy domains, and levels of government. Multi-level governance frameworks are increasingly recognized as essential for effective planning, risk management, crisis preparedness, and long-term resilience. Enhanced collaboration between public authorities, private sector actors, and communities is becoming a central pillar of sustainable tourism development.



Outlook for Tourism Growth in Kenya, 2026

Kenya's tourism sector is experiencing rapid expansion, underpinned by strong government leadership and sustained private-sector investment. The growth is expected to be supported further by;



Tourism Investment

Investor sentiment remains strong. While Nairobi continues to attract business-oriented hotels, significant growth is also occurring in other destinations, such as Mombasa, Naivasha, and Diani.

Resort developments, particularly along the coast and near national parks, are expanding faster.

International hotel brands are actively scaling their presence, e.g., JW Marriott, supported by major infrastructure projects, including the expansion of Jomo Kenyatta International Airport, new road networks, and the Bomas International Convention Complex, scheduled for completion in 2026 and expected to become the largest convention facility in East and Central Africa.



8.16 Product and Source Markets Diversification

Kenya is expanding its offerings to include adventure tourism, cultural experiences, wellness travel, and digital nomad services. Coastal destinations are repositioning through wellness tourism, cultural experiences, and stronger ties to Nairobi’s domestic market. Safari tourism remains popular internationally, with a focus on high-end, low-density lodges emphasizing sustainability and community partnerships. Emerging markets with significant growth prospects, including Malaysia and Poland, are anticipated to enhance international arrivals in 2026, supported by strategic marketing, promotional activities, improved accessibility, and collaborations with tour and travel operators.



Improved Accessibility & Connectivity

Accessibility is key to Kenya’s tourism. Expanding international air routes from Europe, the Middle East, Asia, and North America is expected to positively impact visitor numbers and demographics.

Ongoing upgrades at Jomo Kenyatta International Airport and improved infrastructure, such as roads and rail, will boost arrivals, especially from long-haul markets, by enhancing the visitor experience. Regional integration may also increase visitors from nearby African countries. Domestic connectivity is equally important.

Improved roads, rail links, and domestic flight networks enable tourists to move efficiently between Nairobi and other areas in the country supporting multi-destination itineraries and longer stays.

At the regional level, increased mobility within Africa is expected to stimulate short-haul and repeat travel as neighbouring countries become a growing and more resilient source market.



Government policy and strategic direction

Kenya pursued assertive tourism reform agenda since 2025. The introduction of the eTA system streamlined entry procedures, while visa requirements were abolished in 2025 for most African and several Caribbean countries, allowing stays of up to 60 days without visas or eTAs.

These measure will significantly improved market access. The government also recognized



Emergence of the New Tourism Segments

The expanding youth travel segment, along with other groups such as the solo traveler and digital nomads seeking unique experiences, is expected to boost tourism arrivals in 2026.

The interests of these new segments align well with Kenya’s diverse attractions, ranging from unique events to eco-tourism to digital/innovation hubs. An enhanced portfolio of products and experiences creates opportunities to accommodate these emerging segments and meet projected arrivals.



Technological Development

AI is increasingly influencing how destinations like Kenya attract and engage potential tourists: AI tools (e.g., chatbots, recommendation engines) can customize travel suggestions based on individual preferences, enhancing Kenya’s attractiveness to diverse traveler segments. AI automates content creation and research, reducing costs and time for marketers. Influencers utilize AI to efficiently map travel itineraries and create content, improving the effectiveness of travel promotions. AI-optimized content shared through social channels enhance Kenya’s visibility in global travel searches and make it more discoverable to novice travelers and niche segments, potentially leading to increased travel intentions.



09 | CHAPTER
NINE

CONCLUSION
AND RECOMMENDATIONS

9.1 Conclusion

The 2025 Tourism Sector Performance demonstrates that Kenya's tourism industry remains resilient, competitive, and on a sustained growth trajectory.

International arrivals, tourism earnings, accommodation occupancy, aviation performance, and MICE activities all recorded positive growth, confirming the sector's strong recovery and transition into a phase of consolidation and expansion.

The continued dominance of regional African markets and traditional long-haul markets, particularly Europe and the United States, underscores Kenya's strategic positioning as both a regional hub and a globally recognized leisure destination.

Increased adoption of digital facilitation measures such as the Electronic Travel Authorisation (eTA), expanded air connectivity, product diversification, and strengthened marketing initiatives have further enhanced the country's competitiveness.

However, the sector continues to face emerging challenges including seasonality, infrastructure concentration in major hubs, global economic uncertainties, climate change risks, skills gaps, and increasing competition from alternative accommodation models.

Overall, the outlook for Kenya's tourism sector remains positive, with projections indicating steady growth in visitor arrivals and tourism earnings through 2030.

9.2 Recommendations

The recommendations outlined below are informed by the performance trends, emerging opportunities, and structural challenges identified in the 2025 Tourism Sector Performance analysis. They are designed to strengthen Kenya's competitiveness, enhance sector resilience, promote sustainable growth, and position the country to effectively respond to evolving global tourism dynamics. The recommendations further aim to support evidence-based policy formulation, investment prioritization, and strategic partnerships to drive inclusive and long-term tourism development. The following section outlines some of the key recommendations.



Diversify Source Markets and Tourism Products

Strengthen market penetration in emerging regions while expanding niche segments such as wellness, cultural, adventure, sports, cruise, and digital nomad tourism to enhance competitiveness and visitor spending.



Strengthen MICE and Business Tourism

Accelerate development of modern convention infrastructure and enhance Kenya's global bidding capacity to position the country as a leading MICE destination in Africa.



Leverage Digital Innovation and Tourism Intelligence

Scale up adoption of artificial intelligence, digital marketing, and real-time tourism data systems to support evidence-based planning, improve visitor experience, and enhance sector competitiveness.



Implement and Promote Year-Round Tourism Growth

Implement targeted marketing campaigns, events, and incentives to reduce seasonality and improve utilization of tourism facilities across all regions.



Enhance Accessibility and Connectivity

Expand international and domestic air routes, improve regional airport infrastructure, and strengthen integrated transport networks to support destination diversification and visitor mobility.

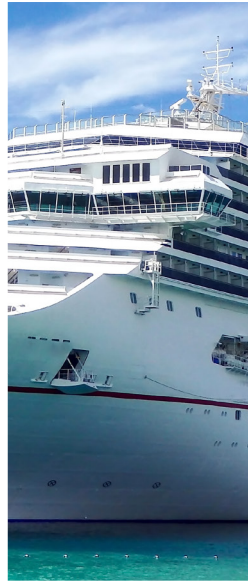


Strengthen International Research Collaboration and Sustainable Tourism Development

Expand cross-border tourism research partnerships, benchmarking, and knowledge exchange to support policy innovation, climate resilience, workforce development, and community-based tourism growth aligned with global best practices.







Tourism Research Institute
www.tri.go.ke