



TOURISM RESEARCH INSTITUTE

KENYA TOURISM SECTOR PERFORMANCE REPORT

1ST QUARTER 2020

MAY 2020

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1. Introduction

Tourism Research Institute has compiled the 1st Quarter 2020 tourism sector performance report which highlights the following:

- International arrival statistics breakdown by nationalities
- International arrival statistics breakdown by points of entry
- Top 30 source markets
- Top 10 source markets 2020 1st Quarter in comparison with 2018 1st Quarter
- Regional markets performance for 2020 1st Quarter in comparison with 2019 1st Quarter
- International arrivals receipts
- Tourism performance projection 2020

The United Nations World Tourism Organisation (UNWTO) defines a tourist as a person traveling to and staying in places outside his/her usual environment for at least 24 hours and not more than one consecutive year for leisure, business and other purposes. Therefore, this report analyses all visitors arrivals spending between 24hrs and one year within Kenya.

2. Methodology

2.1 International Arrivals Data

The basic source of data for international tourist arrivals is the State Department for Immigration and Border Management captured through the PISCES (Personal Identification Secure Comparison and Evaluation System) software. Tourist surveys and other statistical approaches are applied to compute and verify variables like tourist demographic characteristics and purposes of visit.

2.2 International Tourist Receipts/Visitor Exports

Data on receipts and expenditure related to international tourism are generally gathered in the framework of the Balance of Payments under the items 'Services, Travel, Credit and Debit' (International Tourism Receipts and Expenditure)" UNWTO. The base for this is therefore the foreign exchange

credit/balance of payment data from Central Bank of Kenya (CBK). UNWTO and World Tourism Travel Council (WTTC) guidelines/formulae are employed to estimate receipts that are not captured by CBK.

3. International Visitors Arrivals

The total number of international visitors through all points of entry in the 1st Quarter 2020 was **389,590**. This represents a year on year decrease of **17.71%** compared to 1st Quarter 2019 when arrivals were **473,439**.

3.1. International Arrivals by Points of Entry for 1st Quarter 2020

INTERNATIONAL ARRIVAL STATISTICS FOR JANUARY-MARCH 2020 BY POINT OF ENTRY					
Month	JKIA	MIA	Other Airports	Other Entry Points	Total
January	113,078	12,205	773	44,747	170,803
February	106,345	11,086	641	32,896	150,968
March	43,346	3,950	239	20,284	67,819
Total	262,769	27,241	1,653	97,927	389,590

INTERNATIONAL TOURIST ARRIVALS FOR Q1 2020 BY POINTS OF ENTRY IN COMPARISON WITH Q1 2019						
Period	JKIA	MIA	Other Airports	Other Entry Points	Total	% Change
Q1 2020	262,769	27,241	1,653	97,927	389,590	-17.711
Q1 2019	312,819	48,660	4,111	107,850	473,439	

Arrivals through Jomo Kenyatta International Airport, Moi International Airport and other Airports registered highest percentage declines of **-16%**, **-44.02%** and **-59.79%** respectively. The other entry points most significantly the land borders registered the lowest decline of **-9.2%**.

Top 30 Source Markets

The table below gives a breakdown by nationalities of the top 30 source markets through all points of entry in the 1st quarter of the year 2020.

Top 30 Source Markets for 1 st Quarter 2020				
No	Nationality	Female	Male	Total
1.	Uganda	21,738	29,906	51,644
2.	United States	20,024	21,910	41,934
3.	United Republic of Tanzania	11,573	22,404	33,977
4.	United Kingdom	14,285	19,220	33,505
5.	India	6,995	15,353	22,348
6.	Germany	7,088	8,061	15,149
7.	Italy	6,210	6,788	12,998
8.	France	5,515	6,525	12,040
9.	Rwanda	3,157	6,939	10,096
10.	Canada	4,126	4,448	8,574
11.	China	2,837	5,595	8,432
12.	South Africa	2,739	5,442	8,181

13.	Ethiopia	2,564	4,866	7,430
14.	Burundi	1,680	5,721	7,401
15.	Netherlands	2,962	4,197	7,159
16.	Nigeria	1,646	4,353	5,999
17.	Somalia	2,412	3,198	5,610
18.	Sweden	2,338	2,462	4,800
19.	South Sudan	1,986	2,777	4,763
20.	Australia	2,018	2,169	4,187
21.	Democratic Republic of Congo	1,332	2,730	4,062
22.	Denmark	1,951	2,085	4,036
23.	Poland	2,055	1,952	4,007
24.	Norway	1,739	1,737	3,476
25.	Switzerland	1,476	1,622	3,098
26.	Japan	1,083	1,851	2,934
27.	Republic of Korea (South Korea)	1,358	1,401	2,759
28.	Zimbabwe	965	1,794	2,759
29.	Belgium	1,101	1,534	2,635
30.	Spain	1,182	1,412	2,594

4. Top 10 Source Markets for Q1 2020 in Comparison with Q1 2019

Top 10 Source Markets for Q1 2020 in Comparison with Q1 2019					
No	Source Country	Q1 2020 Arrivals	Q1 2019 Arrivals	Variation	% Change
1.	Uganda	51,644	53,706	-2,062	-3.839%
2.	United States	41,934	50,203	-8,269	-16.471%
3.	United Republic of Tanzania	33,977	43,514	-9,537	-21.917%
4.	United Kingdom	33,505	41,972	-8,467	-20.173%
5.	India	22,348	26,929	-4,581	-17.011%
6.	Germany	15,149	19,104	-3,955	-20.702%
7.	Italy	12,998	17,381	-4,383	-25.217%
8.	France	12,040	15,341	-3,301	-21.518%
9.	Rwanda	10,096	8,838	1,258	14.234%
10.	Canada	8,574	10,615	-2,041	-19.228%

5. Regional Ranking of Source Markets for Q1 2020 in Comparison with Q1 2019

Region	Total		% Change
	Q1 2020	Q1 2019	
Africa and Indian Ocean	161,637	187,189	-13.650
Europe	120,094	150,231	-20.060
Asia	42,968	58,350	-26.362

Americas	54,304	64,822	-16.226
Oceania	4,910	6,562	-25.175
Middle East	3,237	4,203	-22.984
Others	2,440	2,082	17.195%
Total	389,590	473,439	-17.71%

6. Tourism growth projections for 2020

International tourist arrivals had been projected to grow by 7.5% in 2020. However, the sector has been strongly hit by the effects of the outbreak of corona virus disease (Covid-19). To contain the virus and slow the spread, Kenya like many other destinations imposed an international travel ban from 25th March 2020. Source countries also imposed travel bans to and from their countries.

Indeed the tourism sector is one of the hardest-hit and affected by the pandemic with impacts on both travel supply and demand particularly from Kenya's top source markets.

7. International Arrivals Receipts

International tourism earned Kenya kshs.35billion in the 1st quarter of 2020 against a projection of 42billion for the period. This represents a 10.38% decrease year on year since the earnings were kshs.39,051,615,000 for the same period in 2019.