

Kenya Tourism Report Q1 2016

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Abstracts

Includes 3 FREE quarterly updates

BMI View: Kenya's tourism sector is currently going through a slump. Traditionally the country has been a popular tourist destination due to its abundance of safari options and its beautiful beaches. Over the last few years however, Kenya has been the victim of a number of high profile terrorist attacks that have left many potential tourists with insecurities about the safety of travel. In the short term this will cause inbound tourist numbers to continue to decrease. The government are, however, making great efforts to improve national security in a bid to change its international image and the perceptions of some of its key markets, especially Europe (recently, both the UK and US lifted travel advisories against areas of Kenya). For these reasons we forecast that arrivals will pick up in the mid- to long-term and begin to steadily increase.

International tourism receipts will follow the same pattern as arrivals and should emerge from a period of decline into gradual increase. The hotel and restaurant industry will see very little growth, both in the short- and long-term. Kenya is such a well-established tourist destination that there is currently a saturation of accommodation options. Only when tourist numbers return to the same level as before the increased terror activity will there be demand for further developments in hotels and restaurants.

Key Updates And Forecasts

Inbound tourism is forecast to see growth from 2017. In the long term this growth will increase at a faster pace than previously expected, to hit 1.4mn by 2019.

By 2019, the higher number of inbound tourists will also push the international tourism receipts up, to USD3.16bn, a y-o-y rise of 16.83% from 2018 - 1.73%

higher than the same forecast last quarter.

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