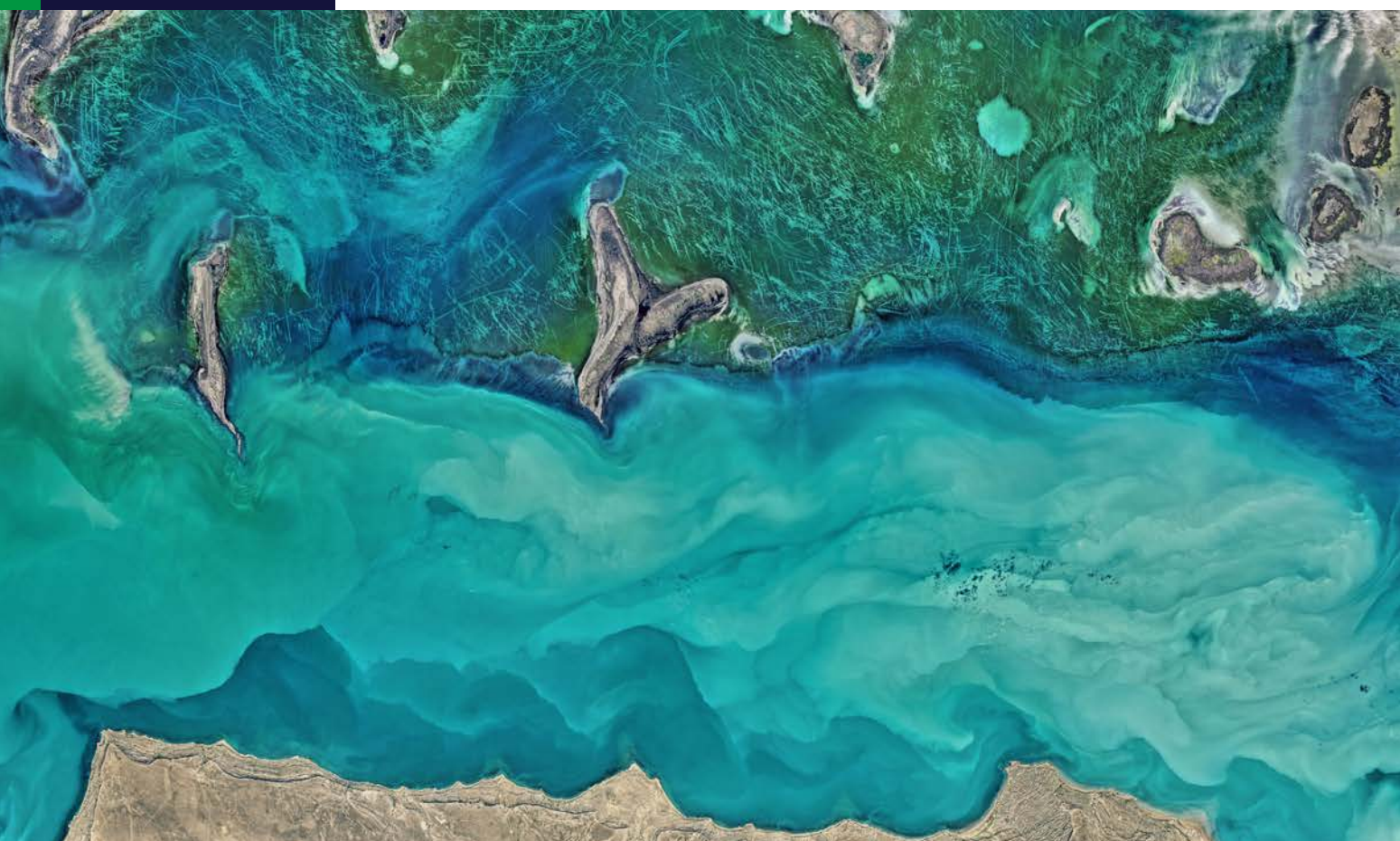



WORLD
TRAVEL &
TOURISM
COUNCIL

TRAVEL & TOURISM
ECONOMIC IMPACT 2017
KENYA



A satellite image of the North Caspian Sea. The sea is a deep blue color, with lighter blue and white patches indicating ice scours. The landmasses are a golden-brown color, showing the coastlines and some inland features. The image is taken from a high angle, looking down at the sea.

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COVER: Ice Scours The North Caspian Sea - NASA
INSIDE COVER: Prince Regent National Park, Australia - NASA



FOREWORD

The United Nations has designated 2017 the *International Year of Sustainable Tourism for Development*. As one of the world's largest economic sectors, Travel & Tourism creates jobs, drives exports, and generates prosperity across the world. The International Year provides an enormous opportunity to further showcase the tremendous economic, social, cultural, environmental, and heritage value that the sector can bring.

The right policy and investment decisions are only made with empirical evidence. For over 25 years, the World Travel & Tourism Council (WTTC) has been providing this evidence, quantifying the economic and employment impact of Travel & Tourism. This year, the 2017 Annual Economic Reports cover 185 countries and 26 regions of the world, providing the necessary data on 2016 performance as well as unique 10-year forecasts on the sector's potential.

Despite the ever-increasing and unpredictable shocks from terrorist attacks and political instability, to health pandemics and natural disasters, Travel & Tourism continued to show its resilience in 2016, contributing direct GDP growth of 3.1% and supporting 6 million net additional jobs in the sector. In total, Travel & Tourism generated US\$7.6 trillion (10.2% of global GDP) and 292 million jobs in 2016, equivalent to 1 in 10 jobs in the global economy. The sector accounted for 6.6% of total global exports and almost 30% of total global service exports.

For the sixth successive year, growth in Travel & Tourism outpaced that of the global economy (2.5%). Additionally in 2016, direct Travel & Tourism GDP growth not only outperformed the economy-wide growth recorded in 116 of the 185 countries covered by the annual economic impact research (including in major Travel & Tourism economies such as Australia, Canada, China, India, Mexico and South Africa), but it also was stronger than the growth recorded in the financial and business services, manufacturing, public services, retail and distribution, and transport sectors.

The outlook for the Travel & Tourism sector in 2017 remains robust and will continue to be at the forefront of wealth and employment creation in the global economy, despite the emergence of a number of challenging headwinds. Direct Travel & Tourism GDP growth is expected to accelerate to 3.8%, up from 3.1% in 2016. As nations seem to be looking increasingly inward, putting in place barriers to trade and movement of people, the role of Travel & Tourism becomes even more significant, as an engine of economic development and as a vehicle for sharing cultures, creating peace, and building mutual understanding.

Over the longer term, growth of the Travel & Tourism sector will continue to be strong so long as the investment and development takes place in an open and sustainable manner. Enacting pro-growth travel policies that share benefits more equitably can foster a talent and business environment necessary to enable Travel & Tourism to realise its potential. In doing so, not only can we expect the sector to support over 380 million jobs by 2027, but it will continue to grow its economic contribution, providing the rationale for the further protection of nature, habitats, and biodiversity.

WTTC is proud to continue to provide the evidence base required in order to help both public and private bodies make the right decisions for the future growth of a sustainable Travel & Tourism sector.



David Scowsill
President & CEO



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THE ECONOMIC IMPACT OF TRAVEL & TOURISM MARCH 2017

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2017 FORECAST

GDP: DIRECT CONTRIBUTION

The direct contribution of Travel & Tourism to GDP was KES257.4bn (USD2.5bn), 3.7% of total GDP in 2016 and is forecast to rise by 6.0% in 2017, and to rise by 6.0% pa, from 2017-2027, to KES487.1bn (USD4.8bn), 3.7% of total GDP in 2027.

GDP: TOTAL CONTRIBUTION

The total contribution of Travel & Tourism to GDP was KES682.0bn (USD6.7bn), 9.8% of GDP in 2016, and is forecast to rise by 5.9% in 2017, and to rise by 5.6% pa to KES1,245.9bn (USD12.3bn), 9.5% of GDP in 2027.

EMPLOYMENT: DIRECT CONTRIBUTION

In 2016 Travel & Tourism directly supported 399,000 jobs (3.4% of total employment). This is expected to rise by 3.0% in 2017 and rise by 3.3% pa to 569,000 jobs (3.4% of total employment) in 2027.

EMPLOYMENT: TOTAL CONTRIBUTION

In 2016, the total contribution of Travel & Tourism to employment, including jobs indirectly supported by the industry was 9.2% of total employment (1,072,500 jobs). This is expected to rise by 3.0% in 2017 to 1,104,500 jobs and rise by 2.9% pa to 1,475,000 jobs in 2027 (8.9% of total).

VISITOR EXPORTS

Visitor exports generated KES173.1bn (USD1,706.2mn), 16.5% of total exports in 2016. This is forecast to grow by 5.2% in 2017, and grow by 6.5% pa, from 2017-2027, to KES343.5bn (USD3,386.0mn) in 2027, 15.3% of total.

INVESTMENT

Travel & Tourism investment in 2016 was KES85.1bn, 5.7% of total investment (USD0.8bn). It should rise by 6.6% in 2017, and rise by 4.0% pa over the next ten years to KES134.5bn (USD1.3bn) in 2027, 5.6% of total.

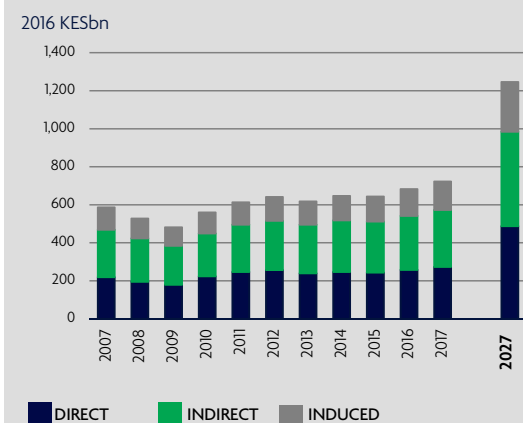
¹ All values are in constant 2016 prices & exchange rates

WORLD RANKING (OUT OF 185 COUNTRIES):

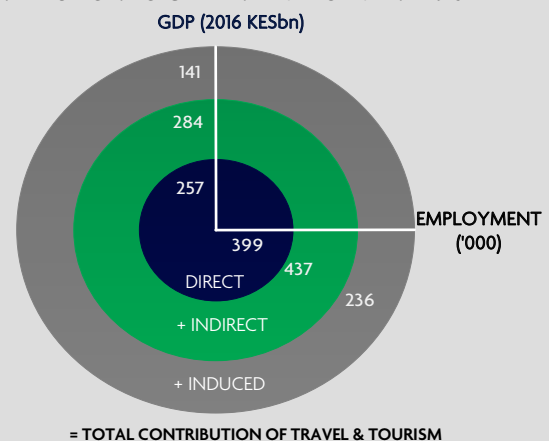
Relative importance of Travel & Tourism's total contribution to GDP

72 ABSOLUTE Size in 2016	92 RELATIVE SIZE Contribution to GDP in 2016	46 GROWTH 2017 forecast	45 LONG-TERM GROWTH Forecast 2017-2027
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TOTAL CONTRIBUTION OF TRAVEL & TOURISM TO GDP

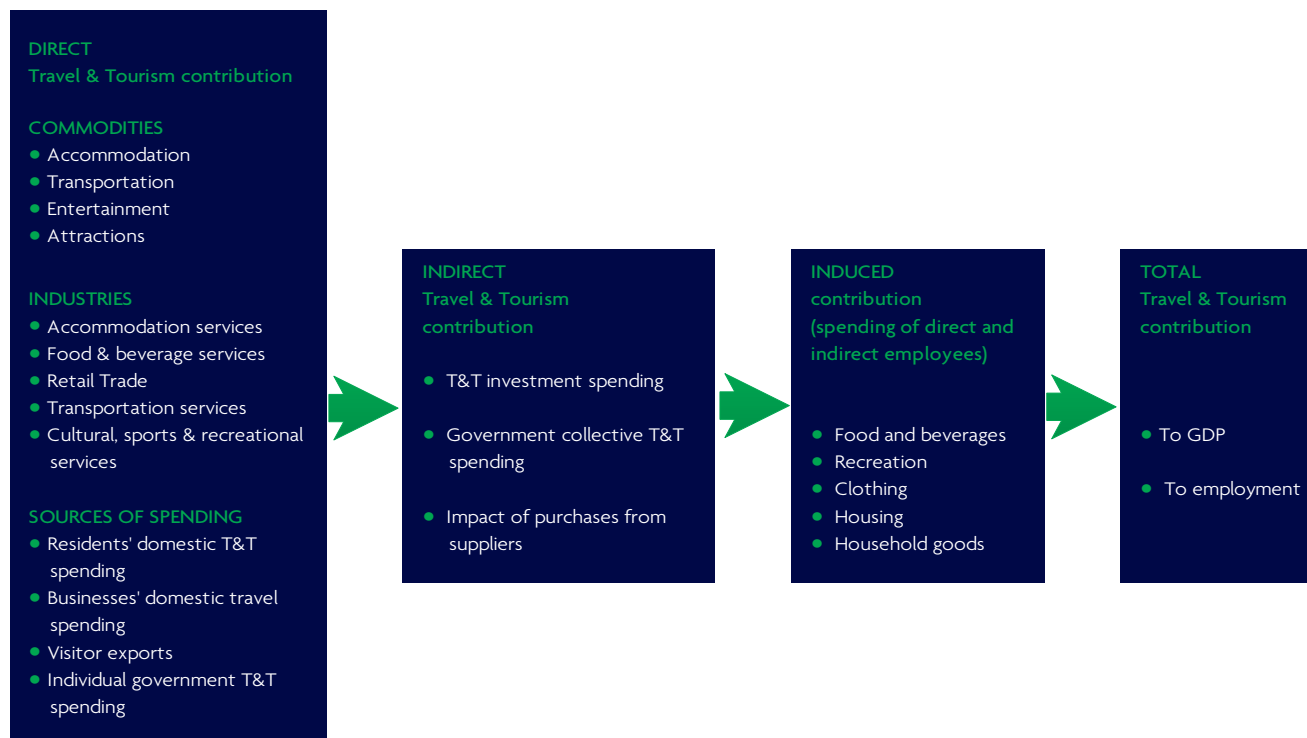


BREAKDOWN OF TRAVEL & TOURISM'S TOTAL CONTRIBUTION TO GDP AND EMPLOYMENT 2016



DEFINING THE ECONOMIC CONTRIBUTION OF TRAVEL & TOURISM

Travel & Tourism is an important economic activity in most countries around the world. As well as its direct economic impact, the industry has significant indirect and induced impacts. The UN Statistics Division-approved Tourism Satellite Accounting methodology (TSA:RMF 2008) quantifies only the direct contribution of Travel & Tourism. But WTTC recognises that Travel & Tourism's total contribution is much greater, and aims to capture its indirect and induced impacts through its annual research.



DIRECT CONTRIBUTION

The direct contribution of Travel & Tourism to GDP reflects the 'internal' spending on Travel & Tourism (total spending within a particular country on Travel & Tourism by residents and non-residents for business and leisure purposes) as well as government 'individual' spending - spending by government on Travel & Tourism services directly linked to visitors, such as cultural (eg museums) or recreational (eg national parks).

The direct contribution of Travel & Tourism to GDP is calculated to be consistent with the output, as expressed in National Accounting, of tourism-characteristic sectors such as hotels, airlines, airports, travel agents and leisure and recreation services that deal directly with tourists. The direct contribution of Travel & Tourism to GDP is calculated from total internal spending by 'netting out' the purchases made by the different tourism sectors. This measure is consistent with the definition of Tourism GDP, specified in the 2008 Tourism Satellite Account: Recommended Methodological Framework (TSA: RMF 2008).

The total contribution of Travel & Tourism includes its 'wider impacts' (ie the indirect and induced impacts) on the economy. The 'indirect' contribution includes the GDP and jobs supported by:

- Travel & Tourism investment spending – an important aspect of both current and future activity that includes investment activity such as the purchase of new aircraft and construction of new hotels;
- Government 'collective' spending, which helps Travel & Tourism activity in many different ways as it is made on behalf of the 'community at large' – eg tourism marketing and promotion, aviation, administration, security services, resort area security services, resort area sanitation services, etc;
- Domestic purchases of goods and services by the sectors dealing directly with tourists – including, for example, purchases of food and cleaning services by hotels, of fuel and catering services by airlines, and IT services by travel agents.

The 'induced' contribution measures the GDP and jobs supported by the spending of those who are directly or indirectly employed by the Travel & Tourism industry.

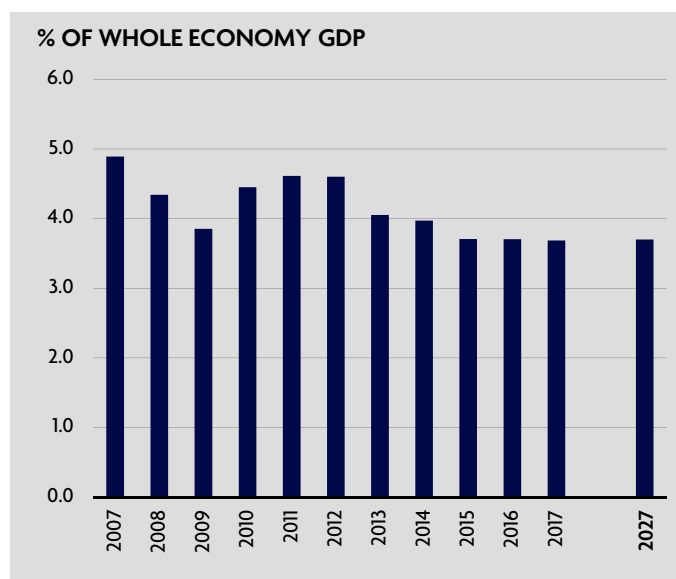
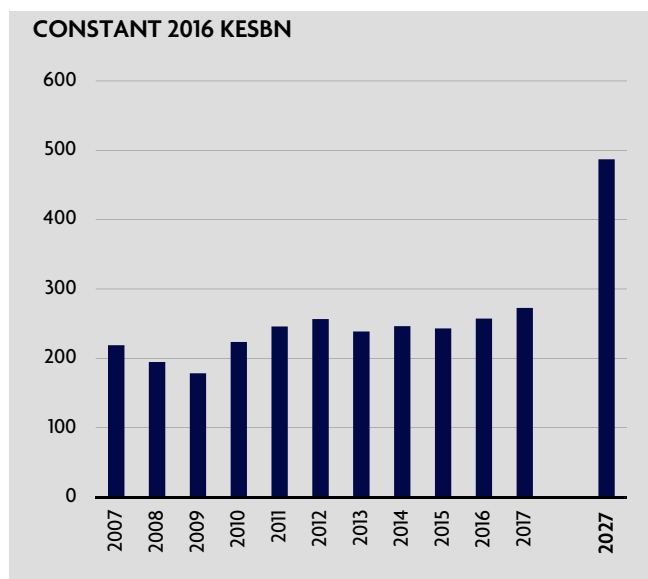
PLEASE NOTE THAT DUE TO CHANGES IN METHODOLOGY BETWEEN 2010 AND 2011, IT IS NOT POSSIBLE TO COMPARE FIGURES PUBLISHED BY WTTC FROM 2011 ONWARDS WITH THE SERIES PUBLISHED IN PREVIOUS YEARS.

TRAVEL & TOURISM'S CONTRIBUTION TO GDP¹

The direct contribution of Travel & Tourism to GDP in 2016 was KES257.4bn (3.7% of GDP). This is forecast to rise by 6.0% to KES272.8bn in 2017. This primarily reflects the economic activity generated by industries such as hotels, travel agents, airlines and other passenger transportation services (excluding commuter services). But it also includes, for example, the activities of the restaurant and leisure industries directly supported by tourists.

The direct contribution of Travel & Tourism to GDP is expected to grow by 6.0% pa to KES487.1bn (3.7% of GDP) by 2027.

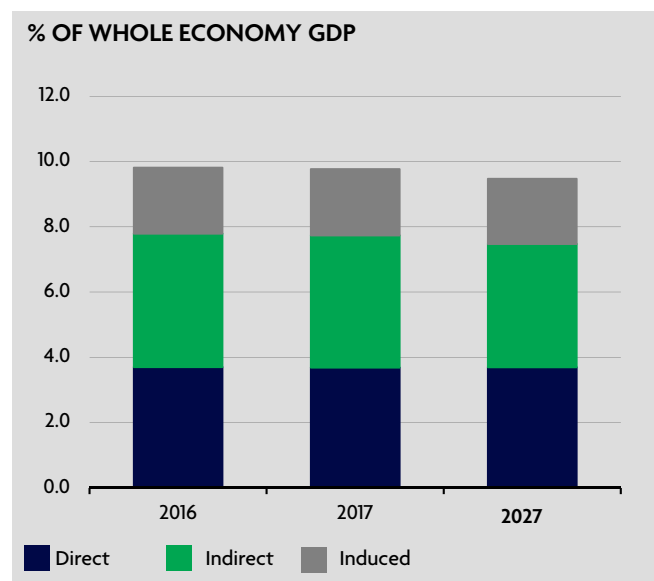
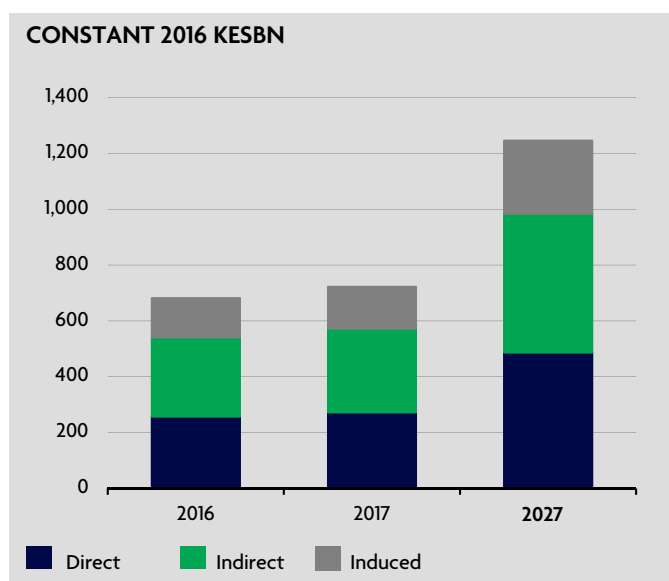
KENYA: DIRECT CONTRIBUTION OF TRAVEL & TOURISM TO GDP



The total contribution of Travel & Tourism to GDP (including wider effects from investment, the supply chain and induced income impacts, see page 2) was KES682.0bn in 2016 (9.8% of GDP) and is expected to grow by 5.9% to KES722.3bn (9.8% of GDP) in 2017.

It is forecast to rise by 5.6% pa to KES1,245.9bn by 2027 (9.5% of GDP).

KENYA: TOTAL CONTRIBUTION OF TRAVEL & TOURISM TO GDP



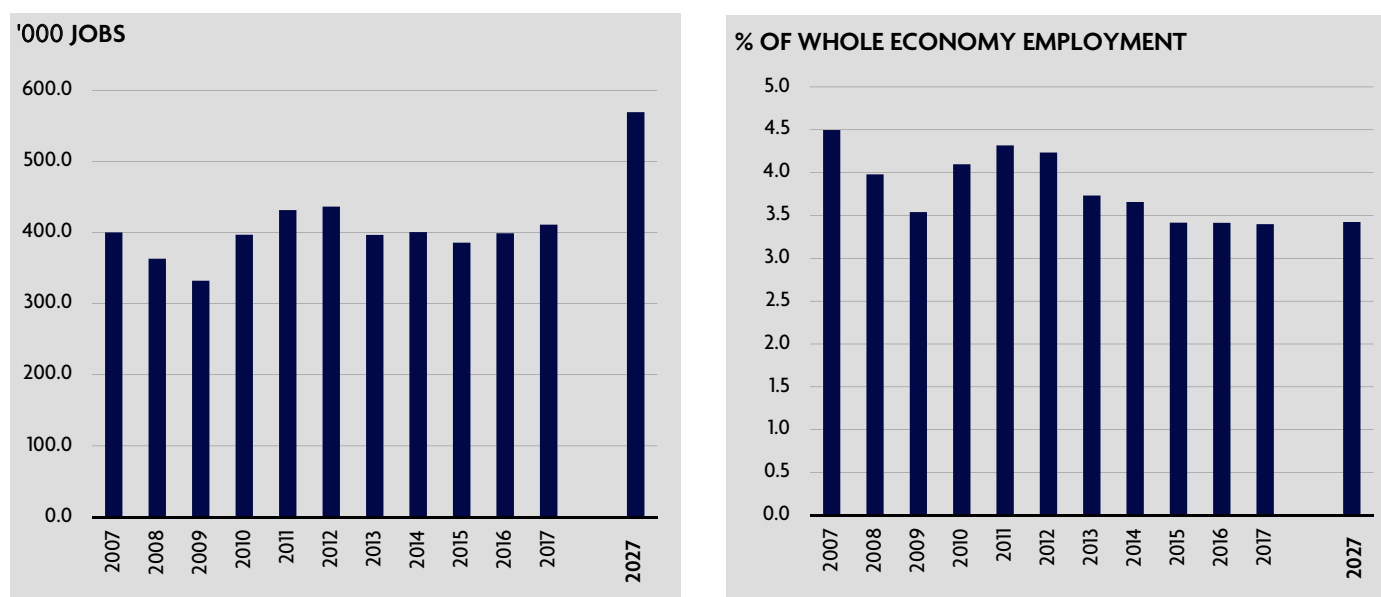
¹ All values are in constant 2016 prices & exchange rates

TRAVEL & TOURISM'S CONTRIBUTION TO EMPLOYMENT

Travel & Tourism generated 399,000 jobs directly in 2016 (3.4% of total employment) and this is forecast to grow by 3.0% in 2017 to 411,000 (3.4% of total employment). This includes employment by hotels, travel agents, airlines and other passenger transportation services (excluding commuter services). It also includes, for example, the activities of the restaurant and leisure industries directly supported by tourists.

By 2027, Travel & Tourism will account for 569,000 jobs directly, an increase of 3.3% pa over the next ten years.

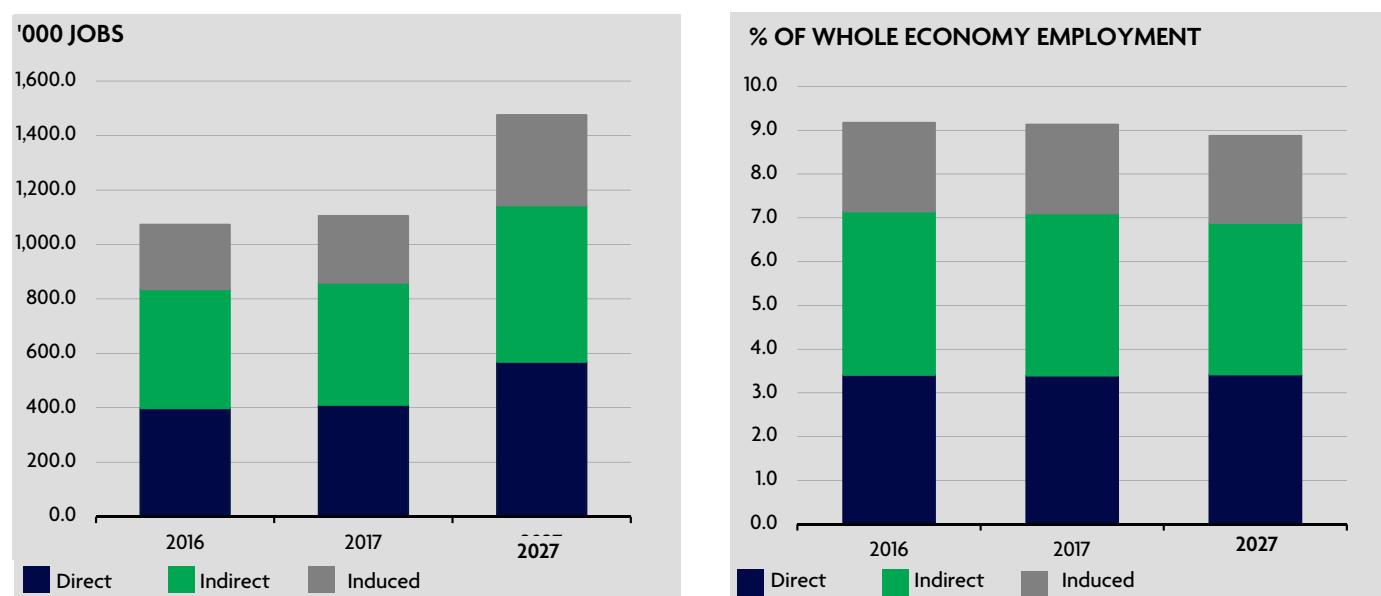
KENYA: DIRECT CONTRIBUTION OF TRAVEL & TOURISM TO EMPLOYMENT



The total contribution of Travel & Tourism to employment (including wider effects from investment, the supply chain and induced income impacts, see page 2) was 1,072,500 jobs in 2016 (9.2% of total employment). This is forecast to rise by 3.0% in 2017 to 1,104,500 jobs (9.1% of total employment).

By 2027, Travel & Tourism is forecast to support 1,475,000 jobs (8.9% of total employment), an increase of 2.9% pa over the period.

KENYA: TOTAL CONTRIBUTION OF TRAVEL & TOURISM TO EMPLOYMENT



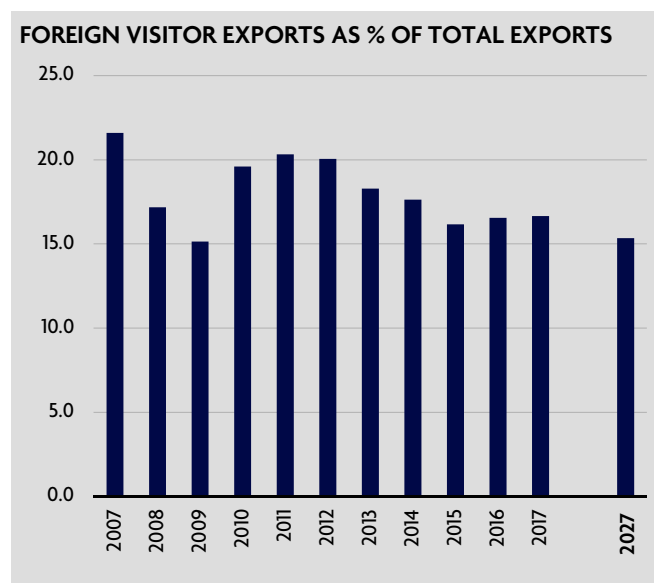
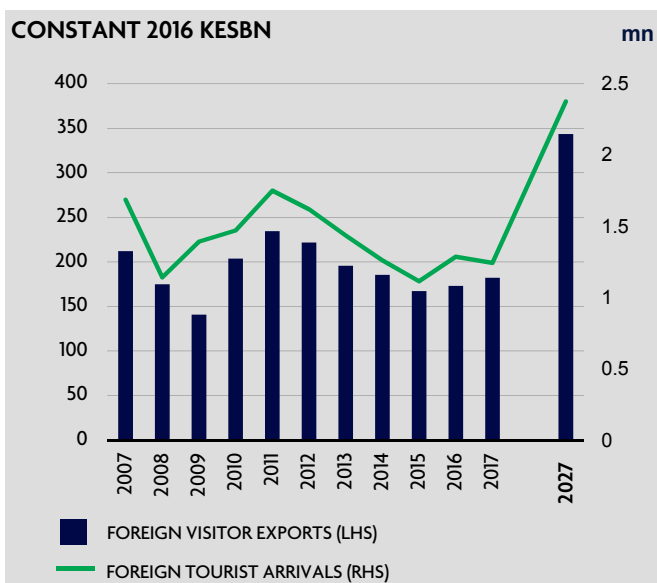
VISITOR EXPORTS AND INVESTMENT¹

VISITOR EXPORTS

Visitor exports are a key component of the direct contribution of Travel & Tourism. In 2016, Kenya generated KES173.1bn in visitor exports. In 2017, this is expected to grow by 5.2%, and the country is expected to attract 1,243,000 international tourist arrivals.

By 2027, international tourist arrivals are forecast to total 2,375,000, generating expenditure of KES343.5bn, an increase of 6.5% pa.

KENYA:VISITOR EXPORTS AND INTERNATIONAL TOURIST ARRIVALS

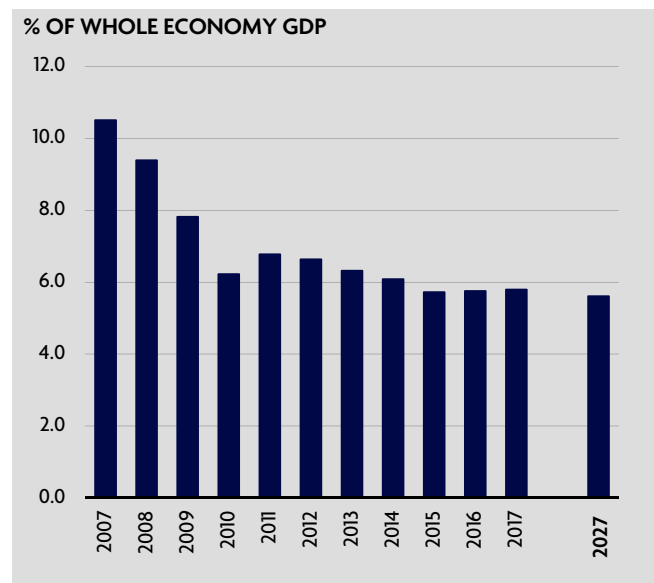
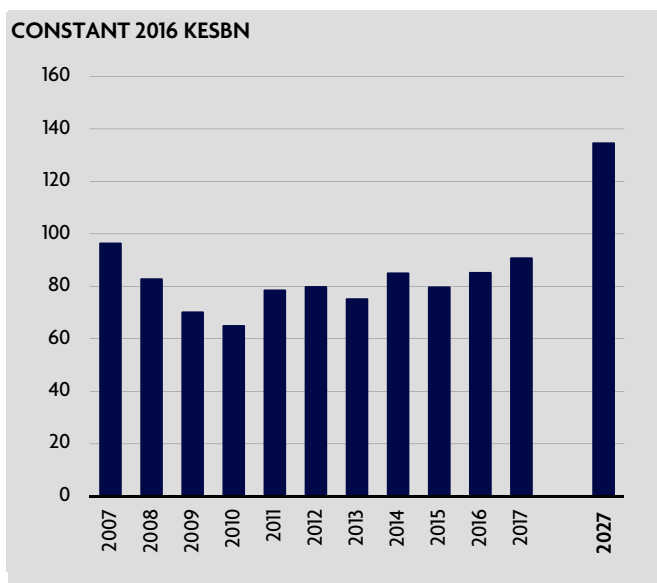


INVESTMENT

Travel & Tourism is expected to have attracted capital investment of KES85.1bn in 2016. This is expected to rise by 6.6% in 2017, and rise by 4.0% pa over the next ten years to KES134.5bn in 2027.

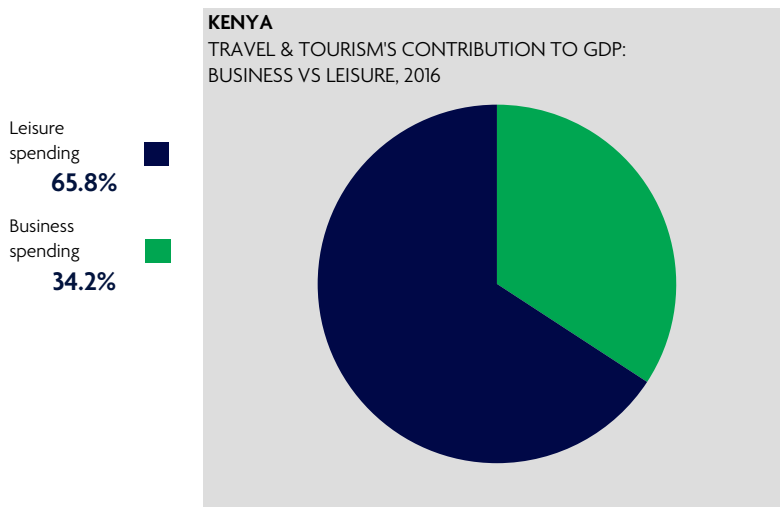
Travel & Tourism's share of total national investment will fall from 5.8% in 2017 to 5.6% in 2027.

KENYA:CAPITAL INVESTMENT IN TRAVEL & TOURISM



¹ All values are in constant 2016 prices & exchange rates

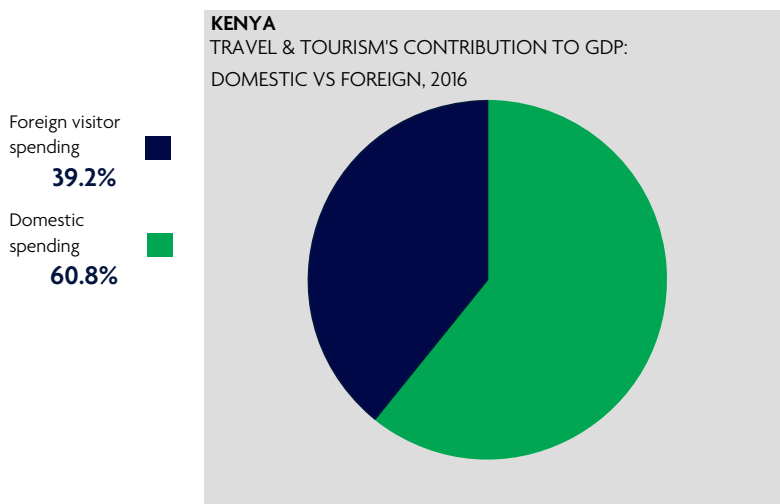
DIFFERENT COMPONENTS OF TRAVEL & TOURISM¹



Leisure travel spending (inbound and domestic) generated 65.8% of direct Travel & Tourism GDP in 2016 (KES290.5bn) compared with 34.2% for business travel spending (KES151.0bn).

Leisure travel spending is expected to grow by 5.6% in 2017 to KES306.7bn, and rise by 6.1% pa to KES554.9bn in 2027.

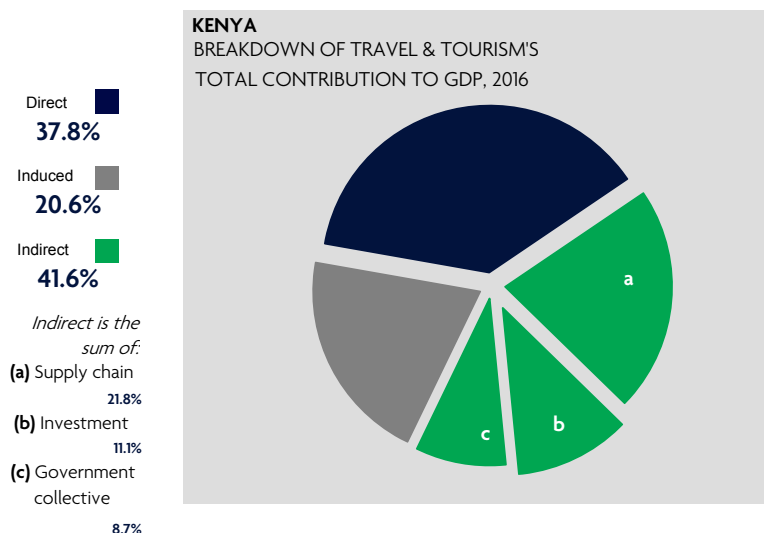
Business travel spending is expected to grow by 6.2% in 2017 to KES160.4bn, and rise by 5.5% pa to KES272.7bn in 2027.



Domestic travel spending generated 60.8% of direct Travel & Tourism GDP in 2016 compared with 39.2% for visitor exports (ie foreign visitor spending or international tourism receipts).

Domestic travel spending is expected to grow by 6.1% in 2017 to KES284.9bn, and rise by 5.4% pa to KES484.1bn in 2027.

Visitor exports are expected to grow by 5.2% in 2017 to KES182.1bn, and rise by 6.5% pa to KES343.5bn in 2027.



The Travel & Tourism industry contributes to GDP and employment in many ways as detailed on page 2.

The total contribution of Travel & Tourism to GDP is nearly three times greater than its direct contribution.

¹ All values are in constant 2016 prices & exchange rates

COUNTRY RANKINGS: ABSOLUTE CONTRIBUTION, 2016

TRAVEL & TOURISM'S DIRECT CONTRIBUTION TO GDP		2016 (US\$bn)
World Average		19.1
39	Egypt	8.7
40	South Africa	8.7
42	Morocco	8.3
67	Tunisia	2.7
69	Kenya	2.5
78	Tanzania	2.1
Sub-Saharan Africa Average		1.0
121	Senegal	0.7
130	Madagascar	0.5
142	Namibia	0.3
170	Gambia	0.08

TRAVEL & TOURISM'S DIRECT CONTRIBUTION TO EMPLOYMENT		2016 '000 jobs
World Average		843.9
20	Morocco	819.0
22	Egypt	773.0
23	South Africa	716.3
34	Tanzania	470.4
41	Kenya	399.2
54	Senegal	246.3
56	Madagascar	224.8
61	Tunisia	206.4
Sub-Saharan Africa Average		146.9
114	Gambia	54.6
141	Namibia	24.0

TRAVEL & TOURISM INVESTMENT		2016 (US\$bn)
28	South Africa	4.7
29	Egypt	4.6
World Average		4.4
34	Morocco	4.1
64	Tanzania	1.2
73	Kenya	0.8
74	Tunisia	0.8
91	Namibia	0.4
Sub-Saharan Africa Average		0.4
111	Madagascar	0.3
142	Senegal	0.1
169	Gambia	0.03

TRAVEL & TOURISM'S TOTAL CONTRIBUTION TO GDP		2016 (US\$bn)
World Average		57.3
35	South Africa	27.3
46	Egypt	19.4
48	Morocco	19.0
72	Kenya	6.7
75	Tanzania	5.9
76	Tunisia	5.7
Sub-Saharan Africa Average		2.6
125	Namibia	1.6
126	Senegal	1.6
132	Madagascar	1.4
172	Gambia	0.2

TRAVEL & TOURISM'S TOTAL CONTRIBUTION TO EMPLOYMENT		2016 '000 jobs
World Average		2152.9
21	Morocco	1902.4
23	Egypt	1763.1
28	South Africa	1533.2
31	Tanzania	1388.8
37	Kenya	1072.4
54	Madagascar	641.6
59	Senegal	576.8
75	Tunisia	429.9
Sub-Saharan Africa Average		375.5
116	Gambia	138.8
123	Namibia	116.0

VISITOR EXPORTS		2016 (US\$bn)
37	South Africa	8.7
40	Morocco	7.8
World Average		7.6
64	Egypt	3.0
73	Tanzania	2.4
86	Tunisia	1.7
88	Kenya	1.7
121	Madagascar	0.7
Sub-Saharan Africa Average		0.7
131	Senegal	0.4
142	Namibia	0.4
165	Gambia	0.09

The tables on pages 7-10 provide brief extracts from the full WTTC Country League Table Rankings, highlighting comparisons with competing destinations as well as with the world and regional average. Averages in above tables are simple cross-country averages. The competing destinations selected are those that offer a similar tourism product and compete for tourists from the same set of origin markets. These tend to be, but are not exclusively, geographical neighbours.

COUNTRY RANKINGS: RELATIVE CONTRIBUTION, 2016

TRAVEL & TOURISM'S DIRECT CONTRIBUTION TO GDP		2016 % share
27	Gambia	9.0
33	Morocco	8.1
41	Tunisia	6.6
57	Madagascar	5.1
59	Senegal	4.8
62	Tanzania	4.7
86	Kenya	3.7
107	Egypt	3.2
	World	3.1
116	South Africa	3.0
124	Namibia	2.8
	Sub-Saharan Africa	2.6

TRAVEL & TOURISM'S DIRECT CONTRIBUTION TO EMPLOYMENT		2016 % share
34	Gambia	7.4
36	Morocco	7.1
48	Tunisia	6.0
69	South Africa	4.6
77	Senegal	4.1
78	Madagascar	4.0
83	Tanzania	3.9
	World	3.6
96	Kenya	3.4
108	Namibia	3.1
114	Egypt	2.9
	Sub-Saharan Africa	2.4

TRAVEL & TOURISM CONTRIBUTION TO TOTAL CAPITAL INVESTMENT		2016 % share
18	Madagascar	19.5
33	Morocco	12.8
38	Gambia	11.9
39	Egypt	11.9
40	Namibia	11.6
52	Tunisia	9.9
56	Tanzania	8.7
63	South Africa	8.1
84	Kenya	5.7
	Sub-Saharan Africa	5.6
	World	4.4
130	Senegal	3.6

TRAVEL & TOURISM'S TOTAL CONTRIBUTION TO GDP		2016 % share
32	Gambia	21.9
41	Morocco	18.5
51	Namibia	14.9
58	Tunisia	13.7
60	Madagascar	13.7
63	Tanzania	13.3
74	Senegal	11.0
	World	10.2
92	Kenya	9.8
99	South Africa	9.3
129	Egypt	7.2
	Sub-Saharan Africa	7.1

TRAVEL & TOURISM'S TOTAL CONTRIBUTION TO EMPLOYMENT		2016 % share
38	Gambia	18.8
46	Morocco	16.6
51	Namibia	14.9
64	Tunisia	12.6
72	Tanzania	11.6
73	Madagascar	11.4
85	South Africa	9.8
	World	9.6
89	Senegal	9.6
97	Kenya	9.2
130	Egypt	6.6
	Sub-Saharan Africa	6.0

VISITOR EXPORTS CONTRIBUTION TO EXPORTS		2016 % share
24	Gambia	46.5
52	Morocco	22.1
53	Tanzania	21.4
60	Madagascar	17.9
65	Kenya	16.5
74	Senegal	13.3
80	Egypt	11.4
84	Tunisia	10.5
91	South Africa	9.9
	Sub-Saharan Africa	8.6
109	Namibia	7.0
	World	6.6

COUNTRY RANKINGS: REAL GROWTH, 2017

TRAVEL & TOURISM'S DIRECT CONTRIBUTION TO GDP		2017 % growth
19	Senegal	7.9
38	Namibia	7.1
54	Madagascar	6.2
57	Kenya	6.0
	Sub-Saharan Africa	4.4
109	Morocco	4.1
	World	3.8
121	Tanzania	3.7
147	South Africa	2.7
154	Tunisia	2.5
156	Egypt	2.5
174	Gambia	0.6

TRAVEL & TOURISM'S DIRECT CONTRIBUTION TO EMPLOYMENT		2017 % growth
47	Tanzania	5.2
58	Namibia	4.7
67	Senegal	4.2
70	Madagascar	4.0
	Sub-Saharan Africa	3.8
76	South Africa	3.6
99	Kenya	3.0
	World	2.1
127	Tunisia	2.0
154	Gambia	0.8
165	Morocco	-0.09
185	Egypt	-8.42

TRAVEL & TOURISM INVESTMENT		2017 % growth
13	Egypt	8.4
41	Kenya	6.6
54	Morocco	6.2
59	Namibia	5.8
65	Senegal	5.5
79	Gambia	4.9
91	Tanzania	4.1
	World	4.1
106	Madagascar	3.3
136	Tunisia	2.1
	Sub-Saharan Africa	0.7
158	South Africa	0.6

TRAVEL & TOURISM'S TOTAL CONTRIBUTION TO GDP		2017 % growth
14	Senegal	7.7
46	Kenya	5.9
49	Madagascar	5.7
70	Namibia	5.1
105	Morocco	4.1
108	Tanzania	4.1
	World	3.6
	Sub-Saharan Africa	3.4
146	South Africa	2.5
160	Tunisia	1.6
164	Gambia	1.5
166	Egypt	1.3

TRAVEL & TOURISM'S TOTAL CONTRIBUTION TO EMPLOYMENT		2017 % growth
10	South Africa	6.7
43	Tanzania	4.6
62	Senegal	3.9
74	Madagascar	3.5
76	Namibia	3.4
	Sub-Saharan Africa	3.3
89	Kenya	3.0
	World	1.9
128	Gambia	1.7
151	Tunisia	0.9
161	Morocco	0.3
184	Egypt	-7.04

VISITOR EXPORTS		2017 % growth
20	Senegal	10.3
24	Namibia	10.1
83	Madagascar	6.5
	Sub-Saharan Africa	6.1
108	Kenya	5.2
	World	4.5
125	South Africa	4.4
130	Morocco	4.2
133	Tunisia	4.0
166	Tanzania	2.0
167	Egypt	1.9
181	Gambia	-1.15

COUNTRY RANKINGS:

LONG TERM GROWTH, 2017 - 2027

TRAVEL & TOURISM'S DIRECT CONTRIBUTION TO GDP		2017 - 2027 % growth pa
1	Namibia	7.9
9	Tanzania	6.8
28	Kenya	6.0
37	Senegal	5.7
42	Egypt	5.6
68	Gambia	5.0
69	Madagascar	5.0
	Sub-Saharan Africa	4.8
87	South Africa	4.5
104	Morocco	4.1
	World	4.0
122	Tunisia	3.6

TRAVEL & TOURISM'S DIRECT CONTRIBUTION TO EMPLOYMENT		2017 - 2027 % growth pa
13	Namibia	4.5
17	Egypt	4.3
19	South Africa	4.1
20	Tanzania	4.0
43	Kenya	3.3
	Sub-Saharan Africa	3.3
53	Gambia	3.1
80	Madagascar	2.6
81	Morocco	2.6
	World	2.2
138	Senegal	1.4
163	Tunisia	1.0

TRAVEL & TOURISM CONTRIBUTION TO TOTAL CAPITAL INVESTMENT		2017 - 2027 % growth pa
5	Gambia	8.9
17	Tanzania	6.6
22	Senegal	6.4
23	Egypt	6.4
31	Namibia	6.1
	Sub-Saharan Africa	4.9
	World	4.5
93	Madagascar	4.1
97	Kenya	4.0
100	South Africa	4.0
112	Morocco	3.7
131	Tunisia	3.0

TRAVEL & TOURISM'S TOTAL CONTRIBUTION TO GDP		2017 - 2027 % growth pa
7	Tanzania	6.8
13	Namibia	6.5
19	Senegal	6.3
27	Egypt	6.1
34	Gambia	5.8
45	Kenya	5.6
72	Madagascar	4.8
	Sub-Saharan Africa	4.8
96	South Africa	4.2
103	Morocco	4.0
	World	3.9
124	Tunisia	3.4

TRAVEL & TOURISM'S TOTAL CONTRIBUTION TO EMPLOYMENT		2017 - 2027 % growth pa
5	Egypt	4.6
10	South Africa	4.2
17	Gambia	3.9
19	Tanzania	3.8
23	Namibia	3.7
	Sub-Saharan Africa	3.2
64	Kenya	2.9
	World	2.5
85	Madagascar	2.5
89	Morocco	2.4
108	Senegal	2.0
171	Tunisia	0.7

VISITOR EXPORTS CONTRIBUTION TO TOTAL EXPORTS		2017 - 2027 % growth pa
1	Egypt	10.0
13	South Africa	7.3
23	Tanzania	6.9
31	Kenya	6.5
	Sub-Saharan Africa	5.9
52	Namibia	5.8
81	Madagascar	4.9
96	Gambia	4.6
103	Morocco	4.4
	World	4.3
111	Tunisia	4.2
149	Senegal	3.2

SUMMARY TABLES: ESTIMATES & FORECASTS

KENYA	2016 USDbn ¹	2016 % of total	2017 Growth ²	USDbn ¹	2027 % of total	Growth ³
Direct contribution to GDP	2.5	3.7	6.0	4.8	3.7	6.0
Total contribution to GDP	6.7	9.8	5.9	12.3	9.5	5.6
Direct contribution to employment ⁴	399	3.4	3.0	569	3.4	3.3
Total contribution to employment ⁴	1,072	9.2	3.0	1,475	8.9	2.9
Visitor exports	1.7	15.8	5.2	3.4	14.6	6.5
Domestic spending	2.6	3.9	6.1	4.8	3.7	5.4
Leisure spending	2.9	2.4	5.6	5.5	2.4	6.1
Business spending	1.5	1.3	6.2	2.7	1.2	5.5
Capital investment	0.8	5.7	6.6	1.3	5.6	4.0

¹2016 constant prices & exchange rates; ²2017 real growth adjusted for inflation (%); ³2017-2027 annualised real growth adjusted for inflation (%); ⁴000 jobs

SUB-SAHARAN AFRICA	2016 USDbn ¹	2016 % of total	2017 Growth ²	USDbn ¹	2027 % of total	Growth ³
Direct contribution to GDP	40.1	2.6	4.4	66.9	2.7	4.8
Total contribution to GDP	108.0	7.1	3.4	178.5	7.3	4.8
Direct contribution to employment ⁴	6,171	2.4	3.8	8,833	2.4	3.3
Total contribution to employment ⁴	15,771	6.0	3.3	22,361	6.1	3.2
Visitor exports	27.8	8.6	6.1	52.4	8.5	5.9
Domestic spending	46.5	3.1	3.2	70.9	2.9	4.0
Leisure spending	46.2	1.6	4.3	78.8	1.7	5.0
Business spending	28.0	1.0	4.2	44.4	1.0	4.3
Capital investment	16.9	5.6	0.7	27.4	5.5	4.9

¹2016 constant prices & exchange rates; ²2017 real growth adjusted for inflation (%); ³2017-2027 annualised real growth adjusted for inflation (%); ⁴000 jobs

WORLDWIDE	2016 USDbn ¹	2016 % of total	2017 Growth ²	USDbn ¹	2027 % of total	Growth ³
Direct contribution to GDP	2,306.0	3.1	3.8	3,537.1	3.5	4.0
Total contribution to GDP	7,613.3	10.2	3.6	11,512.9	11.4	3.9
Direct contribution to employment ⁴	108,741	3.6	2.1	138,086	4.0	2.2
Total contribution to employment ⁴	292,220	9.6	1.9	381,700	11.1	2.5
Visitor exports	1,401.5	6.6	4.5	2,221.0	7.2	4.3
Domestic spending	3,574.6	4.8	3.7	5,414.1	5.4	3.9
Leisure spending	3,822.5	2.3	3.9	5,917.7	2.7	4.1
Business spending	1,153.6	0.7	4.0	1,719.9	0.8	3.7
Capital investment	806.5	4.4	4.1	1,307.1	5.0	4.5

¹2016 constant prices & exchange rates; ²2017 real growth adjusted for inflation (%); ³2017-2027 annualised real growth adjusted for inflation (%); ⁴000 jobs

% of total refers to each indicator's share of the relevant whole economy indicator such as GDP and employment. Visitor exports is shown relative to total exports of goods and services. Domestic spending is expressed relative to whole economy GDP. For leisure and business spending, their direct contribution to Travel & Tourism GDP is calculated as a share of whole economy GDP (the sum of these shares equals the direct contribution). Investment is relative to whole economy investment.

THE ECONOMIC CONTRIBUTION OF TRAVEL & TOURISM: REAL 2016 PRICES

KENYA (KESbn, real 2016 prices)	2011	2012	2013	2014	2015	2016	2017E	2027F
1. Visitor exports	234.5	221.8	195.7	185.4	167.2	173.1	182.1	343.5
2. Domestic expenditure (includes government individual spending)	198.1	226.2	218.0	240.3	251.6	268.5	284.9	484.1
3. Internal tourism consumption (= 1 + 2)	432.6	447.9	413.7	425.7	418.8	441.5	467.1	827.6
4. Purchases by tourism providers, including imported goods (supply chain)	-186.4	-191.2	-174.6	-179.1	-175.4	-184.1	-194.3	-340.5
5. Direct contribution of Travel & Tourism to GDP (= 3 + 4)	246.2	256.8	239.0	246.6	243.4	257.4	272.8	487.1
Other final impacts (indirect & induced)	147.1	153.4	142.8	147.4	145.4	153.8	163.0	291.0
6 Domestic supply chain								
7. Capital investment	78.4	79.7	75.1	84.9	79.6	85.1	90.7	134.5
8. Government collective spending	45.7	47.8	51.9	54.3	58.7	61.7	63.6	95.5
9. Imported goods from indirect spending	-22.3	-22.2	-13.8	-15.3	-15.8	-16.6	-17.5	-23.9
10. Induced	117.6	125.5	122.6	128.6	131.9	140.5	149.7	261.8
11. Total contribution of Travel & Tourism to GDP (= 5 + 6 + 7 + 8 + 9 + 10)	612.7	641.0	617.7	646.5	643.2	682.0	722.3	1,245.9
Employment impacts ('000)								
12. Direct contribution of Travel & Tourism to employment	431.7	436.5	396.8	400.8	385.8	399.2	411.2	569.4
13. Total contribution of Travel & Tourism to employment	1,085.4	1,105.0	1,039.5	1,065.1	1,034.3	1,072.4	1,104.4	1,475.2
Other indicators								
14. Expenditure on outbound travel	34.8	24.9	33.1	26.8	27.1	27.1	27.9	43.4

THE ECONOMIC CONTRIBUTION OF TRAVEL & TOURISM: NOMINAL PRICES

KENYA (KESbn, nominal prices)	2011	2012	2013	2014	2015	2016	2017E	2027F
1. Visitor exports	163.8	169.4	157.5	161.1	158.7	173.1	192.1	610.3
2. Domestic expenditure (includes government individual spending)	138.4	172.8	175.5	208.9	238.7	268.5	300.5	860.2
3. Internal tourism consumption (= 1 + 2)	302.1	342.2	333.0	370.0	397.3	441.5	492.7	1470.5
4. Purchases by tourism providers, including imported goods (supply chain)	-130.2	-146.0	-140.6	-155.7	-166.4	-184.1	-204.9	-605.0
5. Direct contribution of Travel & Tourism to GDP (= 3 + 4)	172.0	196.2	192.4	214.4	230.9	257.4	287.8	865.5
Other final impacts (indirect & induced)	102.7	117.2	115.0	128.1	138.0	153.8	171.9	517.1
6. Domestic supply chain								
7. Capital investment	54.8	60.9	60.4	73.8	75.5	85.1	95.7	238.9
8. Government collective spending	31.9	36.5	41.8	47.2	55.7	61.7	67.1	169.7
9. Imported goods from indirect spending	-15.6	-17.0	-11.1	-13.3	-14.9	-16.6	-18.4	-42.5
10. Induced	82.1	95.9	98.7	111.8	125.1	140.5	157.9	465.2
11. Total contribution of Travel & Tourism to GDP (= 5 + 6 + 7 + 8 + 9 + 10)	427.9	489.7	497.2	562.0	610.2	682.0	761.9	2,213.9
Employment impacts ('000)								
12. Direct contribution of Travel & Tourism to employment	431.7	436.5	396.8	400.8	385.8	399.2	411.2	569.4
13. Total contribution of Travel & Tourism to employment	1,085.4	1,105.0	1,039.5	1,065.1	1,034.3	1,072.4	1,104.4	1,475.2
Other indicators								
14. Expenditure on outbound travel	24.3	19.0	26.7	23.3	25.7	27.1	29.5	77.1

*Concepts shown in this table align with the standard table totals as described in the *2008 Tourism Satellite Account: Recommended Methodological Framework* (TSA: RMF 2008) developed by the United Nations Statistical Division (UNSD), the Statistical Office of the European Communities (EUROSTAT), the Organisation for Economic Co-operation and Development (OECD) and the World Tourism Organization (UNWTO).

Historical data for concepts has been benchmarked to match reported TSA data where available.

THE ECONOMIC CONTRIBUTION OF TRAVEL & TOURISM: GROWTH

KENYA								
Growth ¹ (%)	2011	2012	2013	2014	2015	2016	2017E	2027F ²
1. Visitor exports	15.2	-5.4	-11.8	-5.3	-9.8	3.5	5.2	6.5
2. Domestic expenditure (includes government individual spending)	9.3	14.2	-3.6	10.3	4.7	6.7	6.1	5.4
3. Internal tourism consumption (= 1 + 2)	12.4	3.5	-7.7	2.9	-1.6	5.4	5.8	5.9
4. Purchases by tourism providers, including imported goods (supply chain)	15.7	2.5	-8.7	2.6	-2.0	4.9	5.5	5.8
5. Direct contribution of Travel & Tourism to GDP (= 3 + 4)	10.0	4.3	-6.9	3.2	-1.3	5.8	6.0	6.0
Other final impacts (indirect & induced)	10.0	4.3	-6.9	3.2	-1.3	5.8	6.0	6.0
6. Domestic supply chain								
7. Capital investment	20.9	1.6	-5.8	13.1	-6.3	6.9	6.6	4.0
8. Government collective spending	5.2	4.7	8.6	4.6	8.2	5.0	3.1	4.1
9. Imported goods from indirect spending	30.6	-0.3	-37.7	10.4	3.1	5.1	5.5	3.2
10. Induced	6.2	6.7	-2.3	4.9	2.5	6.6	6.6	5.7
11. Total contribution of Travel & Tourism to GDP (= 5 + 6 + 7 + 8 + 9 + 10)	9.5	4.6	-3.6	4.7	-0.5	6.0	5.9	5.6
Employment impacts ('000)								
12. Direct contribution of Travel & Tourism to employment	8.7	1.1	-9.1	1.0	-3.7	3.5	3.0	3.3
13. Total contribution of Travel & Tourism to employment	7.8	1.8	-5.9	2.5	-2.9	3.7	3.0	2.9
Other indicators								
14. Expenditure on outbound travel	-12.7	-28.6	33.3	-19.2	1.0	0.1	3.2	4.5

¹2011-2016 real annual growth adjusted for inflation (%); ²2017-2027 annualised real growth adjusted for inflation (%)

GLOSSARY

KEY DEFINITIONS

TRAVEL & TOURISM

Relates to the activity of travellers on trips outside their usual environment with a duration of less than one year. Economic activity related to all aspects of such trips is measured within the research.

DIRECT CONTRIBUTION TO GDP

GDP generated by industries that deal directly with tourists, including hotels, travel agents, airlines and other passenger transport services, as well as the activities of restaurant and leisure industries that deal directly with tourists. It is equivalent to total internal Travel & Tourism spending (see below) within a country less the purchases made by those industries (including imports). In terms of the UN's Tourism Satellite Account methodology it is consistent with total GDP calculated in table 6 of the TSA: RMF 2008.

DIRECT CONTRIBUTION TO EMPLOYMENT

The number of direct jobs within Travel & Tourism. This is consistent with total employment calculated in table 7 of the TSA: RMF 2008.

TOTAL CONTRIBUTION TO GDP

GDP generated directly by the Travel & Tourism sector plus its indirect and induced impacts (see below).

TOTAL CONTRIBUTION TO EMPLOYMENT

The number of jobs generated directly in the Travel & Tourism sector plus the indirect and induced contributions (see below).

DIRECT SPENDING IMPACTS

VISITOR EXPORTS

Spending within the country by international tourists for both business and leisure trips, including spending on transport, but excluding international spending on education. This is consistent with total inbound tourism expenditure in table 1 of the TSA: RMF 2008.

DOMESTIC TRAVEL & TOURISM SPENDING

Spending within a country by that country's residents for both business and leisure trips. Multi-use consumer durables are not included since they are not purchased solely for tourism purposes. This is consistent with total domestic tourism expenditure in table 2 of the TSA: RMF 2008. Outbound spending by residents abroad is not included here, but is separately identified according to the TSA: RMF 2008 (see below).

GOVERNMENT INDIVIDUAL SPENDING

Spending by government on Travel & Tourism services directly linked to visitors, such as cultural services (eg museums) or recreational services (eg national parks).

INTERNAL TOURISM CONSUMPTION

Total revenue generated within a country by industries that deal directly with tourists including visitor exports, domestic spending

and government individual spending. This does not include spending abroad by residents. This is consistent with total internal tourism expenditure in table 4 of the TSA: RMF 2008.

BUSINESS TRAVEL & TOURISM SPENDING

Spending on business travel within a country by residents and international visitors.

LEISURE TRAVEL & TOURISM SPENDING

Spending on leisure travel within a country by residents and international visitors.

INDIRECT AND INDUCED IMPACTS

INDIRECT CONTRIBUTION

The contribution to GDP and jobs of the following three factors:

- **CAPITAL INVESTMENT:** Includes capital investment spending by all industries directly involved in Travel & Tourism. This also constitutes investment spending by other industries on specific tourism assets such as new visitor accommodation and passenger transport equipment, as well as restaurants and leisure facilities for specific tourism use. This is consistent with total tourism gross fixed capital formation in table 8 of the TSA: RMF 2008.
- **GOVERNMENT COLLECTIVE SPENDING:** Government spending in support of general tourism activity. This can include national as well as regional and local government spending. For example, it includes tourism promotion, visitor information services, administrative services and other public services. This is consistent with total collective tourism consumption in table 9 of TSA: RMF 2008.
- **SUPPLY-CHAIN EFFECTS:** Purchases of domestic goods and services directly by different industries within Travel & Tourism as inputs to their final tourism output.

INDUCED CONTRIBUTION

The broader contribution to GDP and employment of spending by those who are directly or indirectly employed by Travel & Tourism.

OTHER INDICATORS

OUTBOUND EXPENDITURE

Spending outside the country by residents on all trips abroad. This is fully aligned with total outbound tourism expenditure in table 3 of the TSA: RMF 2008.

FOREIGN VISITOR ARRIVALS

The number of arrivals of foreign visitors, including same-day and overnight visitors (tourists) to the country.

METHODOLOGICAL NOTE

WTTC has an on-going commitment to align its economic impact research with the UN Statistics Division-approved 2008 Tourism Satellite Account: Recommended Methodological Framework (TSA:RMF 2008). This involves the benchmarking of country reports to official, published TSAs, including for countries which are reporting data for the first time, as well as existing countries reporting an additional year's data. New country TSAs incorporated this year include Albania, Indonesia, and Mauritius bringing our total of countries in our benchmarking dataset to 54. Furthermore, we have sourced updated TSAs for 28 countries.

In 2017, we have also been able to add a new country, Tajikistan, taking our coverage to 185 countries. WTTC also produces reports on 25 other regions, sub-regions and economic and geographic groups. This year, there are 10 reports for special economic and geographic groups with GCC and the Organisation of Islamic Cooperation being included for the first time.

ECONOMIC AND GEOGRAPHIC GROUPS

APEC (ASIA-PACIFIC ECONOMIC COOPERATION)

Australia, Brunei, Canada, Chile, China, Hong Kong, Indonesia, Japan, South Korea, Malaysia, Mexico, New Zealand, Papua New Guinea, Peru, Philippines, Russian Federation, Singapore, Taiwan, Thailand, USA, Vietnam.

FORMER NETHERLANDS ANTILLES

Bonaire, Curacao, Sint Maarten, Saba and Sint Eustatius.

G20

Argentina, Australia, Brazil, Canada, China, European Union, France*, Germany*, India, Indonesia, Italy*, Japan, Mexico, Russian Federation, Saudi Arabia, South Africa, South Korea, Turkey, UK*, USA.

GCC (GULF COOPERATION COUNCIL)

Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, UAE

OAS (ORGANIZATION OF AMERICAN STATES)

Argentina, Antigua and Barbuda, Bahamas, Barbados, Belize, Bolivia, Brazil, Canada, Chile, Colombia, Costa Rica, Cuba, Dominican Republic, Dominica, Ecuador, El Salvador, Grenada, Guatemala, Guyana, Haiti, Honduras, Jamaica, Mexico, St Kitts and Nevis, Nicaragua, Panama, Paraguay, Peru, St Lucia, St Vincent and the Grenadines, Suriname, Trinidad and Tobago, USA, Uruguay.

OECD (ORGANISATION FOR ECONOMIC CO-OPERATION AND DEVELOPMENT)

Australia, Austria, Belgium, Canada, Chile, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Israel, Italy, Japan, South Korea, Luxembourg, Mexico, Netherlands, New Zealand, Norway, Poland, Portugal, Slovak Republic, Slovenia, Spain, Sweden, Switzerland, Turkey, UK, USA.

(OIC) ORGANISATION FOR ISLAMIC COOPERATION**

Albania, Algeria, Azerbaijan, Bahrain, Bangladesh, Benin, Brunei Darussalam, Burkina Faso, Cameroon, Chad, Comoros, Egypt, Gabon, Gambia, Guinea, Guyana, Indonesia, Iran, Iraq, Ivory Coast, Jordan, Kazakhstan, Kuwait, Kyrgyzstan, Lebanon, Libya, Malaysia, Maldives, Mali, Morocco, Mozambique, Niger, Nigeria, Oman, Pakistan, Qatar, Saudi Arabia, Senegal, Sierra Leone, Sudan, Suriname, Syria, Tajikistan, Togo, Tunisia, Turkey, UAE, Uganda, Uzbekistan, Yemen.

OTHER OCEANIA

American Samoa, Cook Islands, French Polynesia, Guam, Marshall Islands, Micronesia (Federated States of), New Caledonia, Niue, Northern Mariana Islands, Palau, Samoa, Tuvalu.

PACIFIC ALLIANCE

Chile, Colombia, Mexico, Peru.

SADC (SOUTHERN AFRICAN DEVELOPMENT COMMUNITY)

Angola, Botswana, Democratic Republic of Congo (DRC), Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Seychelles, South Africa, Swaziland, Tanzania, Zambia, Zimbabwe.

* included in European Union

** no data for Afghanistan, Djibouti, Guinea-Bissau, Mauritania, Palestine, Somalia or Turkmenistan

ECONOMIC IMPACT REPORTS:

REGIONS, SUB REGIONS & COUNTRIES

WORLD									
REGION	SUB REGION	COUNTRY	REGION	SUB REGION	COUNTRY	REGION	SUB-REGION	COUNTRY	
AFRICA	NORTH AFRICA	Algeria	AMERICAS	CARIBBEAN	Anguilla	NORTHEAST ASIA	EUROPE	Hungary	
		Egypt			Antigua and Barbuda			Ireland	
		Libya			Aruba			Italy	
		Morocco			Bahamas			Latvia	
		Tunisia			Barbados			Lithuania	
	SUB-SAHARAN	Angola			Bermuda	CENTRAL ASIA		Luxembourg	
		Benin			British Virgin Islands			Malta	
		Botswana			Cayman Islands			Netherlands	
		Burkina Faso			Cuba			Poland	
		Burundi			Dominica			Portugal	
		Cameroon			Dominican Republic			Romania	
		Cape Verde			Former Netherland Antillies			Slovakia	
		Central African Republic			Grenada			Slovenia	
		Chad			Guadeloupe			Spain	
		Comoros			Haiti			Sweden	
		Congo			Jamaica			UK	
		Cote d'Ivoire			Martinique			OCEANIA	Albania
		Democratic Republic of Congo			Puerto Rico				Armenia
		Ethiopia			St Kitts and Nevis				Azerbaijan
		Gabon			St Lucia				Belarus
		Gambia			St Vincent and the Grenadines				Bosnia and Herzegovina
		Ghana			Trinidad and Tobago				Georgia
		Guinea			US Virgin Islands				Iceland
		Kenya		Argentina	Macedonia				
		Lesotho		Belize	Moldova				
		Madagascar		Bolivia	Montenegro				
		Malawi		Brazil	Norway				
		Mali		Chile	Russian Federation				
		Mauritius		Colombia	Serbia				
		Mozambique		Costa Rica	Switzerland				
		Namibia		Ecuador	Turkey				
		Niger		El Salvador	Ukraine				
		Nigeria		Guatemala	SOUTH ASIA	Bahrain			
		Reunion		Guyana		Iran			
		Rwanda		Honduras		Iraq			
		Sao Tome and Principe		Nicaragua		Israel			
		Senegal		Panama		Jordan			
		Seychelles		Paraguay		Kuwait			
		Sierra Leone		Peru		Lebanon			
		South Africa		Suriname		Oman			
		Sudan and South Sudan		Uruguay		Qatar			
		Swaziland		Venezuela		Saudi Arabia			
		Tanzania		Canada	SOUTHEAST ASIA (ASEAN)	Syria			
		Togo		Mexico		United Arab Emirates			
	Uganda	USA		Yemen					
	Zambia								
	Zimbabwe								
EUROPE	EUROPEAN UNION	Austria	MIDDLE EAST						
		Belgium							
		Bulgaria							
		Croatia							
		Cyprus							
		Czech Republic							
		Denmark							
		Estonia							
		Finland							
		France							
Germany									
Greece									



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Contributing data to the WTTTC Economic Impact Model

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HOW MONEY TRAVELS

THE DIRECT, INDIRECT AND INDUCED EFFECT OF TOURISM SPENDING



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