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Tourism for development:
A SAM-multiplier study on sports tourism in Kenya

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Abstract

Tourism presents a significant, yet largely untapped, opportunity for Africa to accelerate economic development, create jobs, and foster inclusive growth. This case study for sports tourism in Kenya estimates that for every $1,000 spent by a sports tourist, a total of $3,600 is generated within the Kenyan economy, highlighting the sector's substantial linkages with other sectors, particularly the food system. By 2035, sports tourism could contribute an estimated $1.21 billion to $2.14 billion to Kenya's economy annually and support the creation of up to 237,000 new jobs. About half of these jobs are expected to benefit lower and middle-income households, supporting their livelihoods and poverty reduction. To fully realize these economic and social benefits, strategic policy interventions are crucial, including targeted investment in tourism infrastructure, marketing, and skill development; a concerted effort to improve the overall business climate to incentivize private sector engagement; and enhanced inter-ministerial coordination between tourism, planning, agriculture and other key stakeholders. While this study focuses on economic impacts, realizing these benefits requires careful planning and sustainable practices to mitigate potential environmental and social challenges.

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1. Introduction

Tourism is increasingly recognized as a vital engine for economic transformation and job creation globally. In 2024, the Travel & Tourism sector contributed an estimated $11.1 trillion to the global GDP, accounting for 10% of the world's economy and supporting 348 million jobs worldwide—roughly one in every ten jobs (WTTC, 2024). An estimated 1.4 billion international tourists (overnight visitors) were recorded around the world in 2024, an increase of 11% over 2023, or 140 million more" (World Tourism Barometer). International tourist arrivals have made full recovery (100% over 2019 levels) and even surpassed by 3 percentage points in Q1 of 2025. Beyond direct spending, tourism can stimulate local economies through indirect and induced effects, fostering infrastructure development, agricultural development, cultural preservation, and local entrepreneurship (Mize, 2025). Developing countries, in particular, can benefit from tourism through economic growth, job creation, and poverty reduction, as they can leverage natural and cultural resources unique to these regions (BMZ, 2025; Mize, 2025).

The African Union's Agenda 2063 highlights tourism's potential to drive sustainable development, aiming for "a prosperous Africa based on inclusive growth and sustainable development" with tourism as a major contributor. Africa's tourism sector has shown significant growth over the past decade and a half. International tourist arrivals in Africa increased from approximately 63.6 million in 2012 to an estimated 74-75 million in 2024, demonstrating a strong recovery and continued upward trend despite global challenges (UN Tourism Barometer, May 2025).

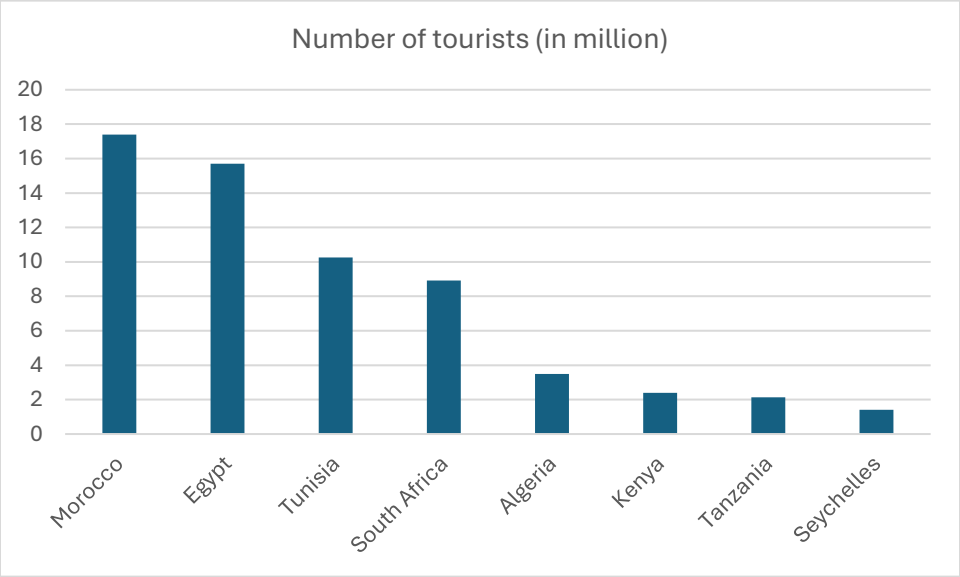
Africa has fully recovered from the effects of the global health and economic crisis following the outbreak of the COVID-19 in 2020. Throughout 2024, the continent has even exceeded pre-pandemic levels by registering 7% more arrivals (meaning 74 million international tourists) compared to 2019 with an increment of 12% more than 2023. This demonstrates the resilience of Africa's tourism and the flexibility of the sector to adapt to an evolving international context which is still exposed to ongoing geopolitical and economic challenges.

Tourism plays a crucial role in Africa's development agenda. Research indicates that receipts from the tourism sector significantly contribute to both the current Gross Domestic Product (GDP) and the economic growth of Sub-Saharan African countries. Tourism is a key driver for job creation, particularly for women (women comprise 54% of the global tourism workforce, and 69% in Africa, UN Tourism, 2019) and youth, and often provides employment opportunities that do not require higher education, directly contributing to poverty reduction (The Borgen Project, 2023; WTFI Live, 2025). For example, the tourism sector contributed

over $30 billion to Sub-Saharan Africa's economy in 2019 alone (The Borgen Project, 2023). Furthermore, tourism revenues can be reinvested into public services and infrastructure, leading to improved roads, schools, and medical clinics in local communities (The Borgen Project, 2023). It also fosters cultural exchange and can support the conservation of natural environments and cultural heritage, aligning with several Sustainable Development Goals (SDGs) such as No Poverty (SDG 1), Decent Work and Economic Growth (SDG 8), and Life on Land (SDG 15) (Ecotourism Kenya, 2024; UNCTAD, 2017).

In 2024, several African nations collectively welcomed over 50 million international visitors. The distribution of these arrivals among several major tourism countries is illustrated below:

Figure 1: International Tourist Arrivals in Key African Countries (2024)



Source: Business Insider Africa, 2025

The UN Tourism Panel of Experts Survey reveals a highly optimistic outlook for Africa regarding tourism prospects in 2025. A significant 63% of respondents for Africa anticipate "Better" (50%) or "Much better" (13%) prospects for their destinations. This combined percentage makes Africa one of the most optimistic regions globally, surpassed only by Asia Pacific. Comparatively, only 13% of African respondents expect "Worse" or "Much worse" conditions, indicating strong confidence. This data suggests that experts foresee a robust and positive year for tourism across the African continent.

Despite this growth, Africa's, and particularly sub-saharan Africa, lags behind its potential. Within the broader tourism sector, this paper specifically focuses on sports tourism as one of the tourism sub-sectors with significant and rapidly growing global impact. Sports tourism is a dynamic segment, accounting for approximately 10% of global tourism expenditure and

projected to grow at an estimated rate of 17.5% between 2023 and 2030 (Future Market Insights, 2025; Grand View Research, 2025). This rapid expansion highlights its potential as a powerful catalyst for economic development. The study further narrows its focus to Kenya because it's one of the countries that has explicitly identified tourism as a priority sector within its national development agenda, with ambitious targets for growth. Despite its potential, Kenya's current tourism numbers, particularly in specialized segments like sports tourism, are relatively lower compared to its assets when benchmarked against other leading tourism destinations. This indicates substantial untapped potential for leveraging sports tourism to accelerate socio-economic development.

2. The Potential of Sports Tourism in Kenya and its Global Context

The global sports tourism market is a rapidly expanding sector. Valued at approximately USD 587.87 billion in 2022, it is projected to reach USD 2,137.86 billion by 2030, demonstrating a robust Compound Annual Growth Rate (CAGR) of 17.5% from 2023 to 2030 (Grand View Research, 2025). This growth is driven by the increasing popularity of major sporting events and the rising interest in sports-related travel.

Sports tourism can generally be categorized into two main types:

- Passive Sports Tourism (Spectator Tourism): This involves individuals traveling to watch major sporting events, such as the Olympics, FIFA World Cup, or Formula 1 races. Their primary purpose is to observe and support their favorite teams or athletes. While passive sports tourism, particularly mega-events, garners significant attention and can generate substantial short-term economic boosts, active sports tourism often offers more sustained and geographically dispersed benefits.
- Active Sports Tourism (Participant Tourism): This involves individuals traveling to actively participate in a sporting event or activity. This can range from amateur competitions like marathons, cycling tours, and golf tournaments to adventure sports such as hiking, mountaineering, and water sports. These tourists are often driven by a desire for personal challenge, fitness, and experiencing new environments through sports. Active sports tourists may spend longer periods in a destination, engage more deeply with local communities, and utilize a wider range of local services, including food services, guided tours and coaching.

In Africa, sports tourism is increasingly recognized as a significant opportunity for economic growth and diversification. Beyond large-scale spectator events such as the 2010 FIFA World Cup in South Africa, active sports tourism is gaining significant traction across Africa, leveraging the continent's diverse landscapes and natural assets. This includes:

- Adventure Sports: Africa's adventure tourism market grew at a CAGR of 10.6% in the first half of 2024 (Future Market Insights, 2025), reflecting a global trend where the adventure tourism market is projected to reach $2.6 trillion by 2033 (Travel Weekly, 2024, citing Allied Market Research). Africa's varied terrain supports a wide array of adventure activities. Popular options include white water rafting on the Zambezi , shark cage diving and bungee jumping (e.g., Victoria Falls, Bloukrans Bridge in South Africa), skydiving (Namibia, Kenya), mountain climbing (Mount Kilimanjaro in Tanzania, Mount Kenya), and sandboarding in Namibia's dunes.
- Golf Tourism: The global golf tourism market is projected to reach USD 27.0 billion in 2025 and expand to USD 65.7 billion by 2035 (Future Market Insights, 2025). Countries like Spain demonstrate the immense economic power of golf tourism, with 1.4 million golf tourists contributing an estimated €15.9 billion to the economy and supporting around 132,994 jobs (Santaló, 2024). In Africa, countries like Morocco and South Africa are established as major golf tourism destinations. Morocco, for instance, drew an estimated 150,000 to 200,000 golf tourists annually prior to recent global events, with golf tourists spending up to three times more than leisure tourists and generating 2.5 indirect jobs per golfer (Morocco World News, 2022; Travel Weekly, 2023). South Africa boasts 456 golf courses and is recognized as one of the fastest-growing golf tourism destinations globally (KPMG, 2006). Other countries, such as Kenya, with over 40 golf courses offering year-round play and hosting international tournaments like the Magical Kenya Open, are well-positioned to attract a larger share of this growing market and have significant untapped potential.
- Marathons and Cycling Tours: These events attract thousands of international participants and contribute significantly to local economies. The Comrades Marathon in South Africa, for example, is a major economic booster for the KwaZulu-Natal province, attracting participants and supporters who boost demand for hospitality, retail, and transport services (Fast Company, 2025). Similarly, Kenya hosts the renowned Lewa Safari Marathon, which draws over 1,200 international participants annually to run through a UNESCO World Heritage Site amidst wildlife (Lewa Wildlife Conservancy). Cycling tours are also popular, with Kenya offering diverse routes from city tours in Nairobi to challenging rides around Mount Kenya and safaris in Maasai Mara. The Cape Town Cycle Tour is another prominent event,

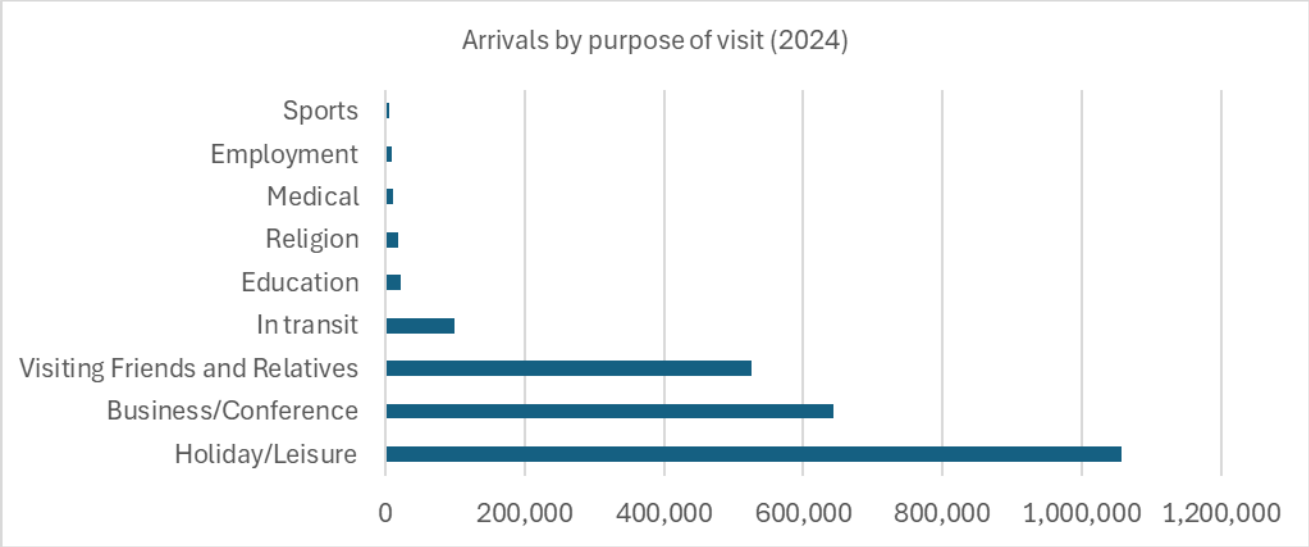
contributing substantially to the local economy (AS Unified, 2024) or paragliding. These activities represent "low-hanging fruit" for rural communities, offering opportunities for local economic development through guided tours and related services (Travel Weekly, 2024).

- Niche Sports: Africa's diverse landscapes offer vast potential for niche sports tourism, attracting adventurers seeking unique experiences. Its varied terrains are ideal for challenging land-based activities like trail running and dynamic cycling routes. The continent's extensive waterways provide thrilling opportunities for white-water rafting and other aquatic adventures. Coastal regions boast excellent conditions for wind-dependent sports such as kite surfing. Furthermore, Africa's rich marine environments are perfect for immersive underwater activities like scuba diving, drawing enthusiasts worldwide.

These active sports tourism activities not only generate immediate revenue from visitors spending on accommodation, food, transportation, and entertainment but can also attract long-term investment and lead to crucial infrastructure upgrades (roads, airports, stadiums), creating jobs and benefiting local residents beyond the tourist stays and event's duration.

Kenya received approximately 2.39 million tourists in 2024. While "Sports" as a distinct category currently represents a small share (0.3% or 6,261 arrivals), activities like safari and water sports are partially captured under "Holiday/Leisure," which accounts for a substantial 1.1 million arrivals. This indicates an existing, albeit unquantified, contribution of sport-related activities within broader tourism.

Figure 2: Kenya Arrivals by Purpose (2024)



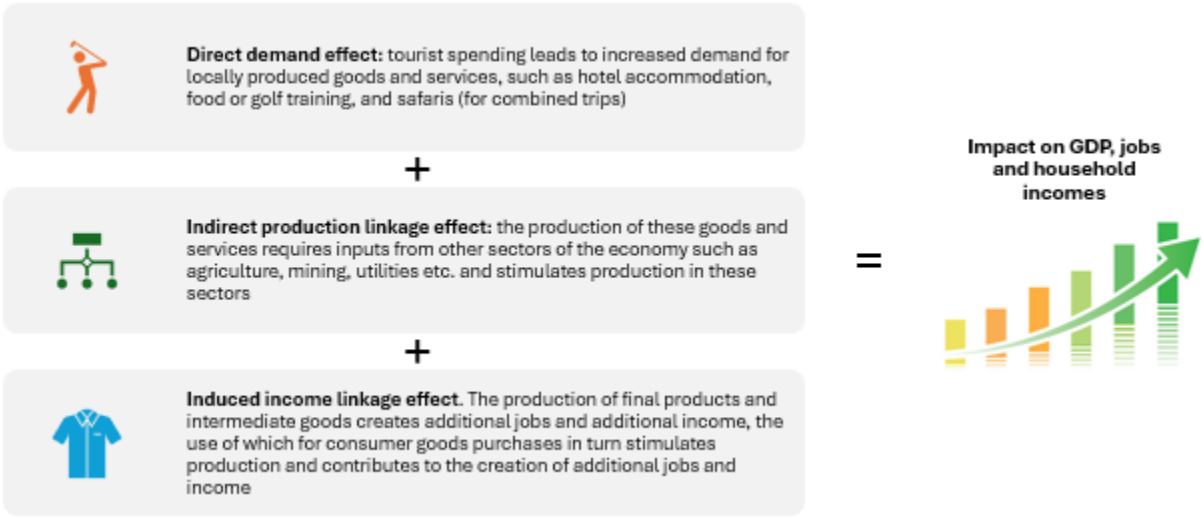
Source: Kenya Ministry of Tourism, 2025

For this study, we recognize that a significant untapped potential lies in specialized sports tourism. In the following, we describe a comprehensive approach to assess the socio-economic impacts of a multifaceted tourism experience, combining sports with Kenya's strengths in wildlife and coastal attractions.

3. Analytical framework to assess socio-economic impacts of sports tourism in Kenya

To quantify the socio-economic impacts, we developed a new Social Accounting Matrix (SAM) multiplier model for Kenya. This model, based on established methodologies (Breisinger et al., 2009) and the latest SAM for Kenya (Omune et al., 2023), provides an economy-wide perspective, capturing direct, indirect, and induced effects of tourism on GDP, jobs, and household incomes.

Figure 3: Graphic illustration of multiplier effects



A Social Accounting Matrix (SAM) is a comprehensive, economy-wide data framework that represents the circular flow of income within an economy. It captures the transactions between all economic agents (households, firms, government, and the rest of the world) and factors of production (labor, capital, agricultural land). The SAM provides a snapshot of the

economy's structure at a given point in time, showing how different sectors are interconnected through their production and consumption activities.

SAM multiplier models are particularly useful for analyzing the economic impacts of tourism for several reasons:

- Economy-wide perspective: Unlike simpler input-output models, SAMs disaggregate institutional accounts (like households by income group) and factor accounts, allowing for a more detailed analysis of how initial changes (e.g., tourist spending) propagate through the entire economy. This captures not only the direct effects on tourism-related sectors but also the indirect effects on supporting industries (e.g., agriculture supplying food to hotels) and induced effects from increased household spending due to new income.
- Distributional impacts: By disaggregating households, SAM models can assess how tourism benefits different income groups and regions, providing insights into its potential for inclusive growth and poverty reduction. This is crucial for policy formulation aimed at equitable development.
- Policy relevance: The comprehensive nature of SAMs allows policymakers to understand the full range of economic consequences of tourism policies and investments, including impacts on GDP, employment, and income distribution.

Several authors have used SAM multiplier models to study the economic impacts of tourism. For example, Santaló, J. 2024 show that of the 15.397 billion euros generated by golf in Spain, 11% are for the golf activity itself, while the remaining 89% are indirect effects through sectors such as hospitality, food services, real estate, among others. Blake et al. (2008) used a SAM-based model to analyze the poverty impacts of tourism in various developing countries, demonstrating how tourism can benefit poor households through various channels. Mitchell and Ashley (2010), while not exclusively SAM-focused, extensively discuss the application of economic modeling, including SAM-like approaches, to quantify pro-poor tourism impacts.

While SAM multiplier models offer a robust framework for economy-wide analysis, it is important to acknowledge their underlying assumptions. Specifically, these models typically assume fixed prices and an elastic supply of labor and other factors of production. However, for the purpose of this study, these assumptions are largely justified. Given the relatively low numbers of additional sports tourists projected, the expansion can largely rely on existing infrastructure like hotels, safari lodges, and golf courses, meaning it is not expected to significantly alter economy-wide prices. Furthermore, Kenya experiences high rates of unemployment and underemployment, particularly among the demographic groups

most likely to benefit from tourism-related jobs. This implies that the additional labor demand generated by increased tourism can largely be met without putting upward pressure on wages, thus supporting the fixed-wage assumption inherent in the multiplier framework.

Given the diverse nature of Kenya's tourism offerings, we have chosen to represent the broader sports and leisure tourism segment by focusing on a combination of safari, beach, and sports (exemplified by golf). Specifically, we designed two hypothetical "sports tourist" packages, each spanning 10 days and including safari, beach and sports activities (see Appendix Table A1 for details):

- Standard Package: Assumes an average spending of $4,541 per sports tourist (excl. international travel).
- Premium Package: Assumes an average spending of $8,841 per sports tourist (excl. international travel).

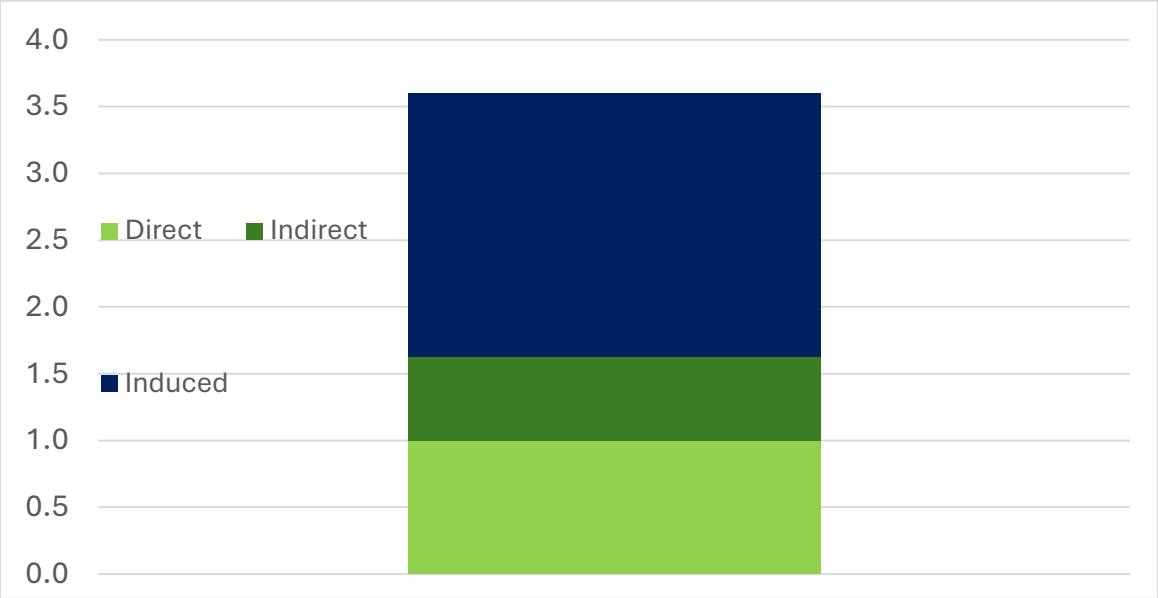
Both packages include specific expenses for golf hotels and safari lodges as well as for golf courses, green fees, caddy fees, and park entrance fees. In addition, there are general expenses for visa fees, local transportation, insurance, souvenirs, etc. Differences in expenditure between the two packages exist in the costs for accommodation and transportation, which are significantly higher in the Premium Package. The various expenditure categories were allocated for the numerical analysis to the expenditure categories recorded in the SAM as shown in Appendix Table A1.

Our analysis assumes a gradual increase in the number of sports tourists, reaching up to 80,000 annually by 2035.

4. Impacts of sports tourism in Kenya

The SAM-multiplier model reveals compelling insights into the potential economic benefits of increased sports tourism in Kenya. For every $1,000 spent by a sports tourist, an additional output of $3,600 is generated within the Kenyan economy (Figure 4). This substantial multiplier effect underscores the strong production and income linkages of tourism with other domestic sectors, demonstrating how initial tourist spending circulates and stimulates economic activity and income generation across various industries.

Figure 4: Multiplier effects of sports tourism in Kenya

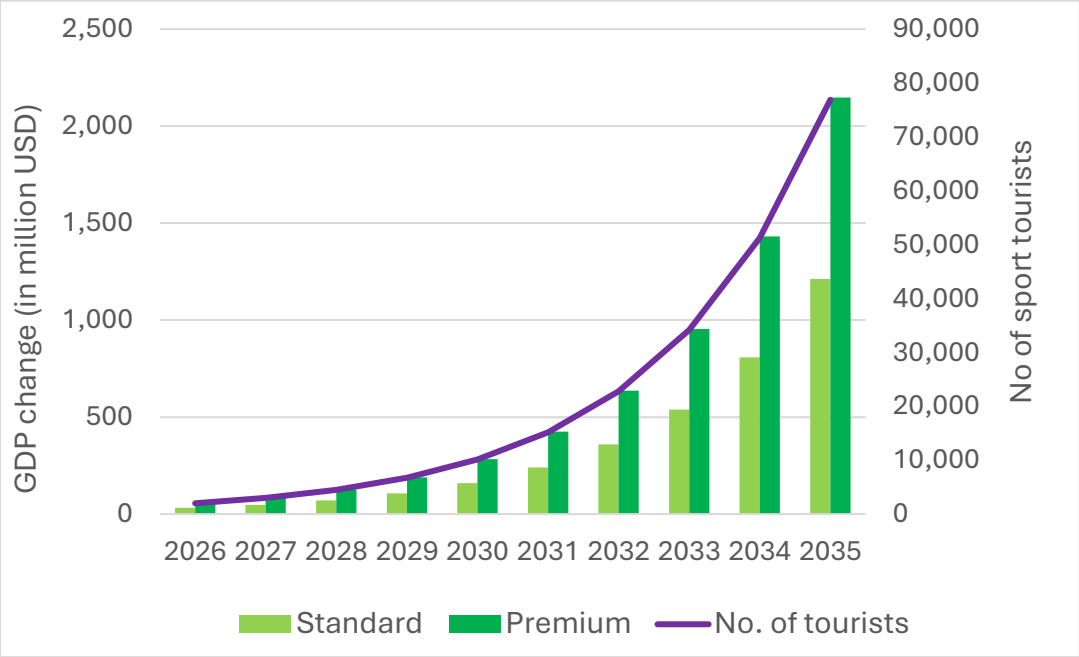


Source: Authors' estimates based on SAM multiplier model

By 2035, the expansion of sports tourism is projected to contribute an estimated $1.21 billion to $2.14 billion to the Kenyan economy (Figure 5). This significant growth would benefit numerous economic sectors both directly and indirectly. Direct beneficiaries include the hospitality sector (hotels, resorts, restaurants), transport services (airlines, tour operators, local transport), retail, and the public sector (visa fees and park entry fees).[2]

[2] See Appendix Tables A1 and A2, for the level and distribution of typical tourist spending in the Standard and Premium Packages.

Figure 5: Annual GDP and No of Sports Tourists



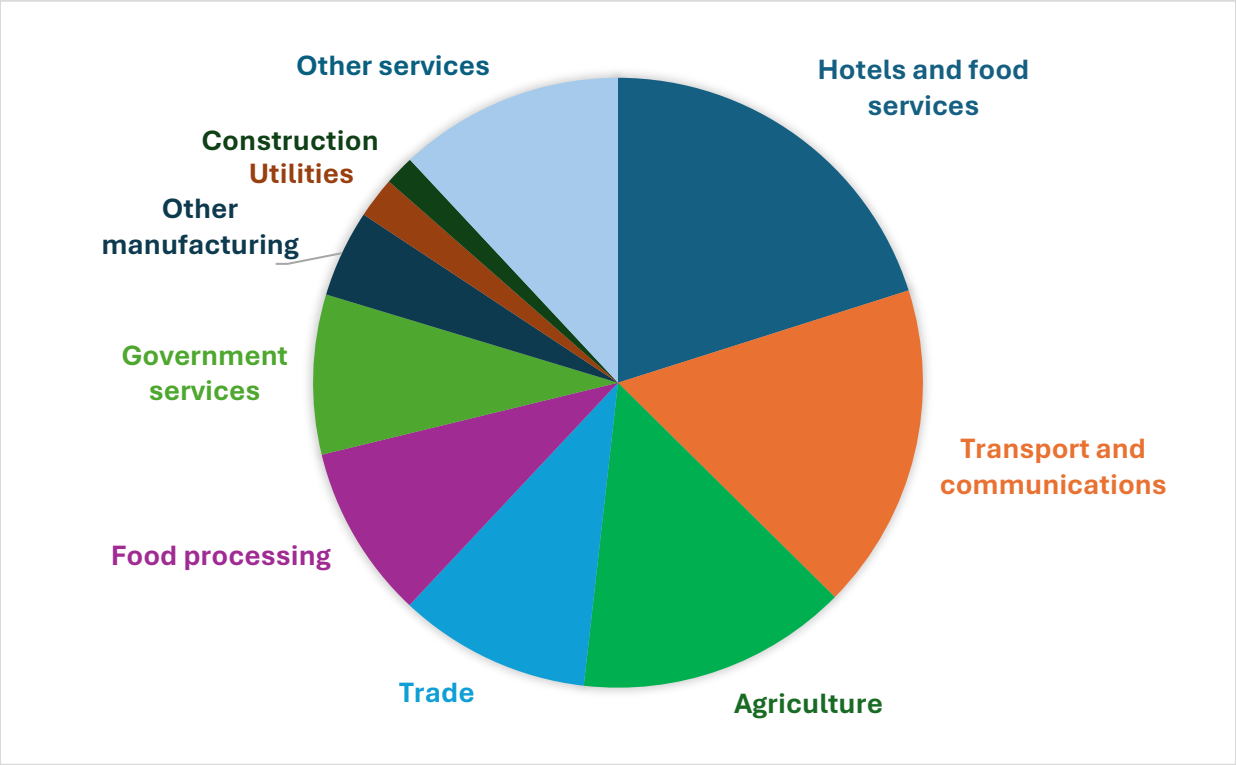
Source: Authors' estimates based on SAM multiplier model

Indirectly, sectors such as agriculture and food services (and the broader food system) would see increased demand for local produce to supply hotels and restaurants catering to tourists (Figure 6). Additionally, arts, entertainment, and local craft industries would experience a boost from increased tourist spending on cultural experiences and souvenirs. Indirect effects resulting from production linkages are quite high for industrial and services sectors, making up 34% and 60% of total indirect effects, while the indirect effects on agriculture make up only 6% (Appendix Table A2). The latter reflects the rather low economic integration of services and agricultural sectors in Kenya.

Yet, all agricultural sectors and the broader food system benefit significantly from induced effects, i.e. income linkages resulting from spending of additional factor income for labor, capital, and agricultural land. Output expansion from income spending is not only 3 times larger than from intermediate demand but is also more directed towards agriculture, now making up 21% of total induced effects (Appendix Table A2).

Thus, while tourist spending initially affects only services sectors, production and income linkages induce trickle-down effects which affect almost all parts of the Kenyan economy with agriculture and the broader food system benefitting most from the local spending of additional household income.

Figure 6: Indirect effects on economic sectors



Source: Authors' estimates based on SAM multiplier model

This economic expansion is also expected to lead to substantial job creation (Figure 7). The growth of sports tourism has the potential to support the creation of up to 237,000 new jobs by 2035. These opportunities would particularly benefit workers with basic qualifications, including those in hospitality, guiding services, event management, and related support roles. This direct and indirect job creation is crucial for addressing unemployment and underemployment, especially among youth and women, thereby contributing significantly to employment opportunities for low and middle-income households across the country.

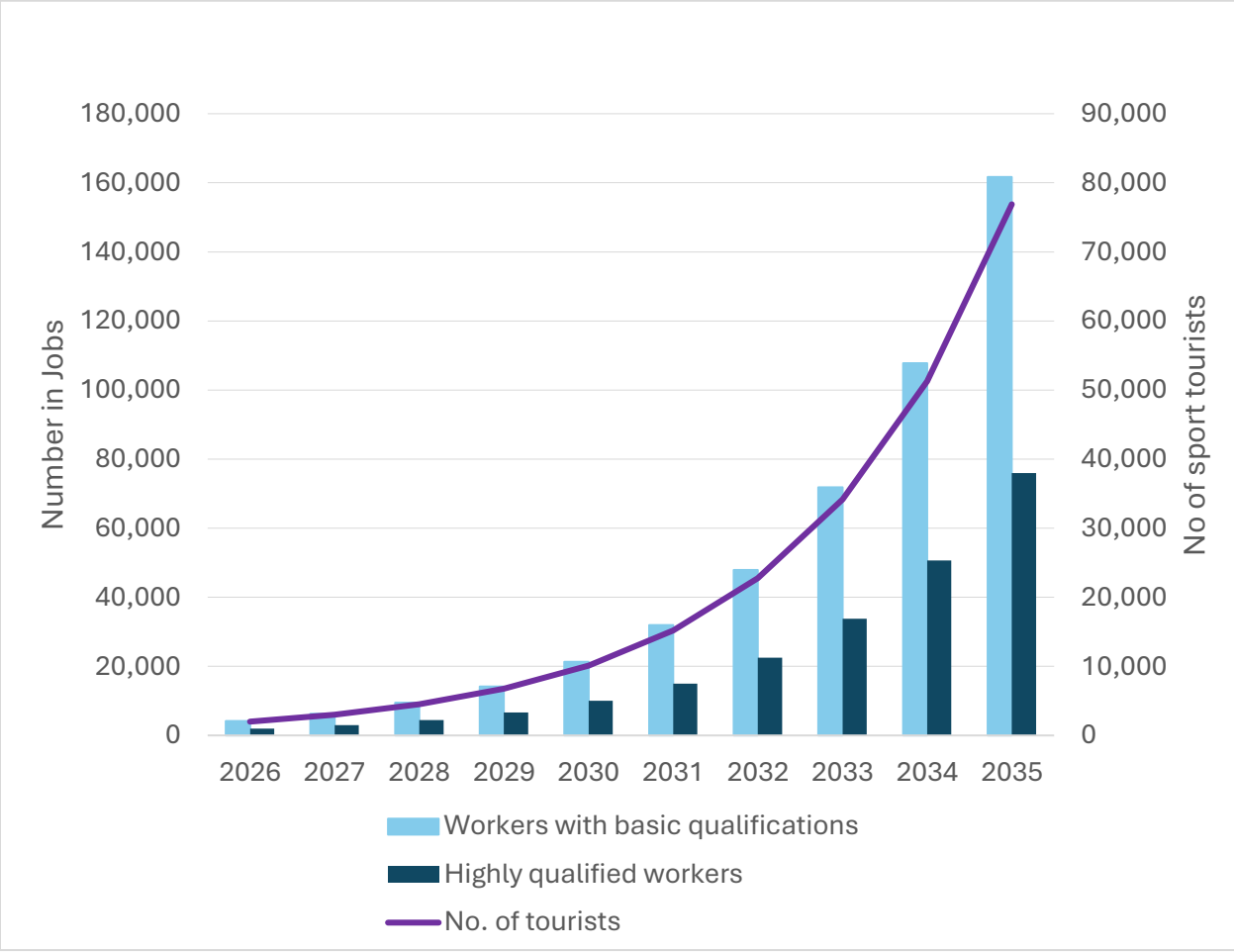
Estimates based on ILO and Kenyan employment survey data suggest that each tourist visit would lead to between 1.4 (Standard package) and 2.8 (Premium package) jobs and 0.7 (Standard) and 1.3 (Premium) jobs for workers with basic and high qualification, respectively. Most jobs will be created in labor intensive agricultural and services sectors (Appendix Table A3). In the services sector, most jobs will be created directly by tourist expenditures on accommodation and sports related business services, which make up more than 50% of local tourist spending. In addition, many jobs will be created in the trade and transport sector, both directly and indirectly through the expansion of intersectoral commodity

exchange. Finally, the expansion of local commodity demand resulting from higher domestic factor income will induce additional labor demand. Overall, almost 140,000 jobs, mostly low and medium-skilled level, may be created by 2035 (Appendix Table A4).

Intersectoral linkages between the services sector and manufacturing concentrate on food processing and trading. Job creation in other manufacturing and service sectors is limited. In total, more than 10,000 additional jobs may be created through intersectoral linkages of sports tourism by 2035 (Appendix Table A4).

Farmers and workers in agriculture are the main beneficiaries of induced effects of sports tourism. Almost 90,000 additional jobs will be created by 2035, 80% of them for workers with basic qualifications. Sectors which benefit most from the expansion of domestic demand are crops and livestock, which employ large numbers of low-skilled workers. The model results suggest that these two sectors will create around 56,000 and 24,000 additional jobs by 2035 (Appendix Table A4).

Figure 7: Number of jobs supported



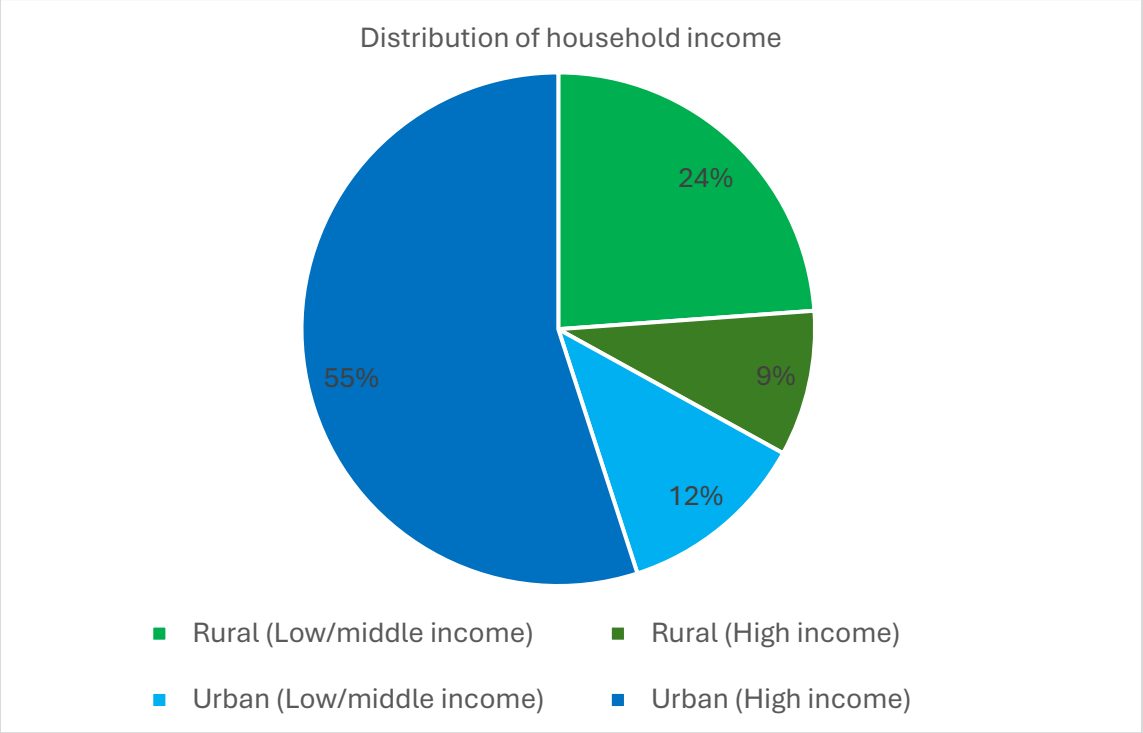
Source: Authors' estimates based on SAM multiplier model

Furthermore, the analysis highlights the inclusive growth potential of sports tourism (Figure 8). Approximately 36% of the revenues generated from sports tourism are projected to directly benefit low and middle-income households. This occurs through various channels, including wages for employees in the tourism sector, income for local suppliers of goods and services, and increased demand for informal sector activities. These benefits are expected to be distributed across both rural and urban areas, fostering broader economic participation and contributing to poverty reduction efforts. The integrated nature of sports tourism, combining activities like safari, beach, and golf, ensures that economic benefits are disseminated across diverse geographical regions and local communities within Kenya.

Rural households, especially those in the low and middle-income group, benefit most from induced effects, i.e. the additional commodity demand resulting from higher income while

high-income urban households are more affected by the expansion of intermediate production (Appendix Table A55).

Figure 8: Distribution of household incomes



Source: Authors' estimates based on SAM multiplier model

5. Policy Implications and Recommendations

The initial findings of this pilot study strongly support the strategic integration of sports tourism into Kenya's national tourism strategy and investment plan. To maximize these benefits, the following policy considerations are advisable. Firstly, **inter-ministerial coordination** is crucial to ensure a holistic approach to tourism development and to leverage cross-sectoral synergies. Given the strong linkages of tourism with other sectors such as agriculture and the food system, effective coordination mechanisms, such as joint task forces or shared policy frameworks, can optimize resource allocation and ensure that tourism growth supports broader economic objectives. Secondly, **targeted investment** in general tourism infrastructure, marketing, and skill development can unlock its full potential. This includes improving transportation networks, enhancing digital connectivity,

launching international marketing campaigns tailored to sports tourists, and establishing vocational training programs to equip local populations with the necessary skills for the sector (UN Tourism, 2023). Thirdly, **improving the business climate** is essential to incentivize and foster private sector engagement. This involves streamlining regulatory processes, enhancing transparency, strengthening property rights, and providing access to finance and investment incentives for tourism-related businesses. A conducive business environment will attract both domestic and foreign investment, which is vital for the sustainable growth of the sports tourism sector (World Bank, 2020).

It is important to note that this study focuses on socio-economic aspects. Even a relatively small expansion of sports tourism (up to 80,000 annually by 2035), who can largely utilize existing infrastructure such as hotels, safari lodges, and golf courses, if not carefully managed, could pose environmental and social challenges. Nonetheless, potential issues related to golf, such as significant water consumption, especially in arid or water-stressed regions, remain a concern (Greenly, 2025; Responsible Travel, 2019). Additionally, increased waste generation and localized pollution from tourist activities and associated facilities could occur (Sustainable Travel International, 2024). Therefore, careful planning and the implementation of sustainable practices are essential to mitigate these potential negative impacts and ensure that sports tourism contributes positively to Kenya's long-term environmental sustainability and development.

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8. Appendix Tables

Appendix Table A1: Spending of sport tourists (US$/tourist)

Expenditure category	Standard Package		Premium Package		SAM category	
International flight from Europe	1,000	economy	3,000	business		
Visa fee	51		51		Public administration	cpadm
Accomodation golf hotels	1,400	7 nights a 200	2,450	7 nights a 350	Hotels	chotl
Accomodation safari lodges	900	3 nights a 300	3,000	3 nights a 1000	Hotels	chotl
Transport	350		1,500	incl. 3 domestic flights	Transport	ctran
Food and beverage	465		465		Restaurants	crest
Park entry fees	600	3 days	600	3 days	Public administration	cpadm
Instruction, golf supplies, rentals etc.	150		150		Business services	cbsrv
Green fees	250	5 rounds	250	5 rounds	Business services	cbsrv
Caddy fees	75		75		Business services	cbsrv
Souvenirs	100		100		Trade	ctrad
Personal insurance	200		200		Financial services	cfsrv
Total local expenditures	4,541		8,841			

Appendix Table A2: Sectoral impact of tourist spending (US$/tourist and share of total)

	Total sectoral impact				Tourist spending				Production linkages/indirect effects				Income linkages/induced effects			
	Standard	Premium	shares		Standard	Premium	shares		Standard	Premium	shares		Standard	Premium	shares	
Total	**16,318**	**31,841**	**100**	**100**	**4,541**	**8,841**	**100**	**100**	**2,725**	**5,591**	**100**	**100**	**9,052**	**17,409**	**100**	**100**
Agriculture	**2,062**	**3,978**	**13**	**12**	**0**	**0**	**0**	**0**	**166**	**333**	**6**	**6**	**1,896**	**3,645**	**21**	**21**
Crops	1,391	2,680	9	8	0	0	0	0	85	170	3	3	1,306	2,510	14	14
Livestock	440	852	3	3	0	0	0	0	65	132	2	2	375	721	4	4
Forestry	157	302	1	1	0	0	0	0	9	16	0	0	149	286	2	2
Fishing	74	144	0	0	0	0	0	0	7	15	0	0	67	128	1	1
Industry	**2,541**	**5,016**	**16**	**16**	**0**	**0**	**0**	**0**	**928**	**1,914**	**34**	**34**	**1,613**	**3,102**	**18**	**18**
Mining	19	38	0	0	0	0	0	0	8	17	0	0	11	21	0	0
Manufacturing	1,984	3,913	12	12	0	0	0	0	662	1,370	24	25	1,323	2,543	15	15
Food processing	1,321	2,575	8	8	0	0	0	0	377	758	14	14	945	1,817	10	10
Textiles	266	570	2	2	0	0	0	0	168	382	6	7	98	188	1	1
Wood & paper	85	163	1	1	0	0	0	0	29	56	1	1	55	107	1	1
Chemicals	176	349	1	1	0	0	0	0	40	87	1	2	136	262	2	2
Metals & machinery	82	149	1	0	0	0	0	0	33	54	1	1	49	95	1	1
Other manufacturing	54	108	0	0	0	0	0	0	15	33	1	1	39	75	0	0
Energy & water	312	615	2	2	0	0	0	0	160	324	6	6	151	291	2	2
Construction	226	449	1	1	0	0	0	0	98	202	4	4	128	247	1	1
Services	**11,714**	**22,847**	**72**	**72**	**4,541**	**8,841**	**100**	**100**	**1,631**	**3,344**	**60**	**60**	**5,543**	**10,662**	**61**	**61**
Trade	1,461	2,856	9	9	100	100	2	1	396	900	15	16	965	1,856	11	11
Transport & communication	2,480	5,614	15	18	350	1,500	8	17	430	841	16	15	1,700	3,273	19	19
Hotels & food services*	2,882	6,099	18	19	2,765	5,915	61	67	-115	-262	-4	-5	232	446	3	3
Finance & business	3,444	6,085	21	19	675	675	15	8	829	1,679	30	30	1,940	3,731	21	21
Government	1,214	1,732	7	5	651	651	14	7	19	36	1	1	543	1,045	6	6
Other services	234	461	1	1	0	0	0	0	72	149	3	3	162	312	2	2

*Negative output effect implies net imports.

Source: Authors' estimates based on SAM multiplier model

Appendix Table A3: Tourist spending impact on job creation (no of workers per tourist)

Sector	All workers		Workers with basic qualification		Higly qualified workers	
	Standard	Premium	Standard	Premium	Standard	Premium
Total	**2.1**	**4.1**	**1.4**	**2.8**	**0.7**	**1.3**
Agriculture	**0.8**	**1.5**	**0.6**	**1.2**	**0.2**	**0.3**
Crops	0.5	1.0	0.4	0.7	0.1	0.2
Livestock	0.2	0.4	0.2	0.3	0.0	0.1
Forestry	0.1	0.1	0.0	0.1	0.0	0.0
Fishing	0.0	0.0	0.0	0.0	0.0	0.0
Industry	**0.1**	**0.2**	**0.1**	**0.1**	**0.0**	**0.1**
Mining	0.0	0.0	0.0	0.0	0.0	0.0
Manufacturing	0.1	0.1	0.1	0.1	0.0	0.0
Food processing	0.0	0.1	0.0	0.0	0.0	0.0
Textiles	0.0	0.1	0.0	0.1	0.0	0.0
Wood & paper	0.0	0.0	0.0	0.0	0.0	0.0
Chemicals	0.0	0.0	0.0	0.0	0.0	0.0
Metals & machinery	0.0	0.0	0.0	0.0	0.0	0.0
Other manufacturing	0.0	0.0	0.0	0.0	0.0	0.0
Energy & water	0.0	0.0	0.0	0.0	0.0	0.0
Construction	0.0	0.0	0.0	0.0	0.0	0.0
Services	**1.2**	**2.4**	**0.7**	**1.5**	**0.5**	**0.9**
Trade	0.5	0.9	0.3	0.6	0.2	0.3
Transport & communication	0.1	0.1	0.0	0.1	0.0	0.1
Hotels & food services	0.5	1.0	0.3	0.7	0.1	0.3
Finance & business	0.1	0.1	0.0	0.0	0.1	0.1
Government	0.1	0.2	0.0	0.0	0.1	0.1
Other services	0.0	0.0	0.0	0.0	0.0	0.0

Source: Authors' estimates based on SAM multiplier model

Appendix Table A4: Tourist spending impact on job creation (no of workers in 2035)

Sector	All			Workers with basic qualification		Higly qualified workers	
	Total	Standard	Premium	Standard	Premium	Standard	Premium
Total	**237,720**	**81,009**	**156,711**	**54,612**	**107,104**	**26,397**	**49,607**
Agriculture	**87,471**	**29,856**	**57,615**	**23,505**	**45,360**	**6,352**	**12,255**
Crops	56,452	19,282	37,170	14,725	28,384	4,557	8,786
Livestock	23,802	8,106	15,695	6,720	13,009	1,387	2,686
Forestry	5,775	1,976	3,799	1,591	3,059	385	740
Fishing	1,442	491	951	469	907	22	44
Industry	**10,808**	**3,550**	**7,258**	**2,528**	**5,196**	**1,022**	**2,061**
Mining	299	100	199	73	145	27	54
Manufacturing	8,287	2,705	5,582	2,117	4,381	588	1,201
Food processing	3,046	1,034	2,012	815	1,587	218	425
Textiles	4,622	1,461	3,162	1,187	2,569	274	593
Wood & paper	115	40	75	15	29	24	46
Chemicals	166	56	110	30	60	25	50
Metals & machinery	148	52	96	26	49	25	47
Other manufacturing	190	63	127	43	86	20	41
Energy & water	982	330	652	47	93	283	559
Construction	1,241	416	825	291	577	125	248
Services	**139,441**	**47,602**	**91,839**	**28,579**	**56,548**	**19,023**	**35,290**
Trade	51,264	17,350	33,914	11,321	22,129	6,029	11,785
Transport & communication	8,185	2,531	5,654	1,454	3,249	1,078	2,405
Hotels & food services	58,964	19,138	39,826	13,410	27,875	5,728	11,951
Finance & business	8,599	3,241	5,358	938	1,588	2,303	3,771
Government	12,428	5,342	7,086	1,455	1,707	3,886	5,379

Source: Authors' estimates based on SAM multiplier model

Appendix Table A5: Tourist spending impact on household income (US$/tourist and share of total)

	Total impact				Production linkages/indirect effects				Income linkages/induced effects			
	Standard	Premium	shares		Standard	Premium	shares		Standard	Premium	shares	
National	**7,858**	**15,113**	**100**	**100**	**3,078**	**5,921**	**100**	**100**	**4,780**	**9,192**	**100**	**100**
Q1	274	528	3	3	69	133	2	2	206	395	4	4
Q2	455	875	6	6	124	239	4	4	331	637	7	7
Q3	725	1,394	9	9	222	426	7	7	503	967	11	11
Q4	1,363	2,619	17	17	515	989	17	17	848	1,630	18	18
Q5	5,041	9,697	64	64	2,149	4,134	70	70	2,892	5,563	61	61
Rural	**2,592**	**4,995**	**33**	**33**	**661**	**1,282**	**21**	**22**	**1,931**	**3,712**	**40**	**40**
Q1	238	457	3	3	49	95	2	2	188	362	4	4
Q2	356	684	5	5	74	141	2	2	282	543	6	6
Q3	506	974	6	6	109	212	4	4	397	762	8	8
Q4	773	1,492	10	10	221	432	7	7	552	1,061	12	12
Q5	720	1,387	9	9	208	402	7	7	512	984	11	11
Urban	**5,266**	**10,118**	**67**	**67**	**2,417**	**4,639**	**79**	**78**	**2,849**	**5,479**	**60**	**60**
Q1	37	71	0	0	19	37	1	1	17	33	0	0
Q2	99	191	1	1	50	97	2	2	49	94	1	1
Q3	219	420	3	3	112	215	4	4	107	205	2	2
Q4	590	1,127	8	7	294	558	10	9	296	569	6	6
Q5	4,321	8,310	55	55	1,941	3,732	63	63	2,380	4,578	50	50

Source: Authors' estimates based on SAM multiplier model