

Uganda Tourism Sector Situational Assessment: Tourism Reawakening



Foreword

Uganda, a top African destination in the 1960s, has reawakened up again at a time the country is marking 50 years of independence. Uganda received 1,151,000 visitor arrivals in the year 2011 representing an increase of 34% from 2010, an indication of a growing tourism market. As a result, the sector is already making major contributions to employment, revenue generation, and foreign exchange earnings.

The tourism sector which was prioritized as a primary growth sector in the 2010/11-2014/15 National Development Plan (NDP), once again has its own fully fledged Ministry of Tourism, Wildlife and Heritage. In terms of visitor arrivals, conference business, and investments in the tourist accommodation facilities, the sector is catching up. There has also been resurgence in the numbers of wildlife owing to the high conservation initiatives. These are all indicators of a vibrant sector on a strong growth path.

Ugandan tourism is at a turning point with tremendous opportunities emerging. Lonely Planet, an independent tourists' trusted information source, has named Uganda its top destination for 2011/12. In addition, Uganda has received accolades from six trusted publications including: **Virungas: One of 20 Must-See Places for 2012** by *National Geographic Traveller Magazine*, **Bwindi: Best African Birding Destination (2011)** by *Travel Africa Magazine* and **Rwenzori Mountains: One of World's 15 Best Hikes (2011)** by *National Geographic Society*.

Against this background, the Ministry of Tourism, Wildlife and Heritage approached the World Bank to assist in undertaking a Rapid Situational Assessment of the sector to reposition tourism as a key avenue to transform Uganda to a prosperous country. The Ministry is grateful for the support provided by the World Bank and the United Kingdom's Department for International Development (DFID) in carrying out this assessment.

This assessment report focuses on the immediate and short-term recommendations that can be implemented within 24 months to propel the sector towards competitiveness and sustained growth. The report also shows that with the concerted efforts of government working in effective partnership with the development partners and private sector, a lot could be achieved in terms of tourism marketing, conservation and skills development, among others.

We commend the efforts of all the stakeholders and call for support to harness tourism, wildlife and heritage resources for the transformation of Ugandan economy as a highly competitive and preferred tourist destination.

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Table of Contents

- I. Introduction 1
 - Background 1
 - Objective of this Assessment 2
- II. Sector Performance 2
 - 1. Tourist Arrivals 2
 - 2. Average Length of Stay and Expenditures 4
 - 3. Contribution to GDP 4
 - 4. Tourism Service Providers 4
 - 5. Employment 4
 - 6. National Park (NP) Visitation 5
- III. Key Issues 6
 - 1. Policy and Planning 6
 - 2. Skills Development 8
 - 3. Conservation 10
 - 4. Branding & Marketing 12
 - 5. Product Development and Value Chain 14
 - 6. Infrastructure Development 16
 - 7. Coordination and Public-Private Partnerships 17
- IV. Recommendations 19
 - 1. Policy and Planning 19
 - 2. Skills Development 20
 - 3. Conservation 21
 - 4. Branding & Marketing 23
 - 5. Product Development and Value Chain 25

6. Infrastructure Development 26

7. Coordination and Public-Private Partnerships 27

V. Action Plan for Priority Activities 28

Annexes 31

 Annex 1: List of Interviewees and Collaborators 31

 Annex 2: MTWH Organizational Chart 34

 Annex 3: Brief Summary of the Hotel and Tourism Training Institute (HTTI) 35

 Annex 4: Population Estimates of Various Mammal Species in Uganda 36

 Annex 5: Tourism Priority Roads 37

 Annex 6: Additional Tables 38

 Annex 7: Mapping of Donor Support to Tourism Sector: Current and Pipeline 41

References 44

Endnotes 47

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This is a technical document of the World Bank and does not represent an official position of the Bank or of its Executive Board. The document provides a rapid situational assessment of the Ugandan tourism sector, based upon a request from the Uganda Ministry of Tourism, Wildlife, and Heritage (MTWH). The document has been written by Bradley Weiss and Dr. Hannah Messerli. The Task Team Leaders are Martin Fodor and Dr. Hannah Messerli. We are grateful for the financial support from the UK Department for International Development (DFID) Trust Fund.

List of Tables

Table 1: UWA Expenditures and Revenues: 2005/2006-2009/2010.....	11
Table 2: Successful Tourism Taglines.....	14
Table 3: Specific National Park Infrastructure and Equipment Needs and Opportunities.....	22
Table 4: Top Ten Priority Actions for Immediate to Short Term.....	29
Table 5: UWA Overall Species Population Estimates (1960s-2011).....	36
Table 6: Select Species Counts Published by Auditor General (2006-2010).....	36
Table 7: Tourism Roads Prioritized for Upgrading.....	37
Table 8: Principal Types of Leisure Tourism in Uganda.....	38
Table 9: Size and Growth of Primary and Second Leisure Tourism Markets: 2006-2010.....	38
Table 10: Provisional List of Concessions Being Considered by UWA.....	39
Table 11: Concession Fees Collected by UWA: Range and Average per Category.....	40

List of Figures

Figure 1: Tourist Arrivals by Purpose (2010).....	3
Figure 2: Regional International Leisure Tourism Market Share	3
Figure 3: Tourism’s Direct and Total Contribution to Employment: 2005-2011 (‘000)	5
Figure 4: Visitation to National Parks by Category: 2007-2010	5
Figure 5: Distribution of National Park Visitation (2010).....	6
Figure 6: Map of Priority Tourism Roads	37

List of Acronyms and Abbreviations

BINP	Bwindi Impenetrable National Park
BTC	Belgian Technical Cooperation
CICS	Competitiveness & Investment Climate Strategy Secretariat
DFID	Department for International Development (UK)
DTIS	Diagnostic Trade Integration Study
EIF	Enhanced Integrated Framework
EU	European Union
FIT	Foreign Independent Traveler
GDP	Gross Domestic Product
HTTI	Hotel and Tourism Training Institute
ITB	Internationale Tourismus-Borse Berlin
ITC	International Trade Centre
GMP	General Management Plan
KINP	Kibale National Park
KVNP	Kidepo Valley National Park
LDPG	Local Development Partners Groups
LMNP	Lake Mburo National Park
LRA	Lord's Resistance Army
MENP	Mount Elgon National Park
MFNP	Murchison Falls National Park
MGNP	Mgahinga National Park
MOFPED	Ministry of Finance, Planning, and Economic Development
MOJCA	Ministry of Justice and Constitutional Affairs
MOLG	Ministry of Local Government
MTTI	Ministry of Tourism, Trade, and Industry
MTWA	Ministry of Tourism, Wildlife, and Antiquities
MTWH	Ministry of Tourism, Wildlife, and Heritage
NFA	National Forestry Authority
NORAD	Norwegian Agency for Development Cooperation
NPA	National Planning Authority
NGO	Non-governmental Organization
NP	National Park
PAMSU	Protected Area Management and Sustainable Use
PM	Prime Minister
PRESTO	Presidential Initiative for Sustainable Tourism
PSFU	Private Sector Foundation Uganda

QENP	Queen Elizabeth National Park
RMNP	Rwenzori Mountains National Park
SCOPE	Strengthening the Competitiveness of Private Enterprise
SSA	Sub-Saharan Africa
STAR	Sustainable Tourism-Albertine Rift
TCC	Tourism Coordination Committee
TIMS	Tourism Information Management System
TTCI	Travel & Tourism Competitiveness Index
UBOS	Uganda Bureau of Statistics
UCOTA	Uganda Community Tourism Association
UGSTDP	Uganda Sustainable Tourism Development Programme
UGX	Ugandan Shillings
UIA	Uganda Investment Authority
UNCTAD	United Nations Conference on Trade and Development
UNDP	United Nations Development Programme
UNESCO	United Nations Educational, Scientific, and Cultural Organization
UNRA	Uganda National Roads Authority
UNWTO	World Tourism Organization
USAGA	Uganda Safari Guides Association
USAID	United States Agency for International Development
UTA	Uganda Tourism Association
UTB	Uganda Tourism Bureau
UWA	Uganda Wildlife Authority
UWEC	Uganda Wildlife Education Centre
UWRTI	Uganda Wildlife Research and Training Institute
UWTI	Uganda Wildlife Training Institute
VFR	Visiting Friends and Relatives
VP	Vice President
WEF	World Economic Forum
WTTC	World Travel & Tourism Council
WTO	World Trade Organization
WWF	World Wildlife Fund

Executive Summary

Tourism in Uganda, a top African destination in the 1960s, has reawakened over the past decade. In fact, international tourism arrivals more than quadrupled from 205,000 in 2001 to 945,000 in 2010. As a result, the sector is already a major contributor to employment, revenue, and foreign exchange generation. Yet, Uganda still lags far behind its regional competitors in terms of tourism market share. Furthermore, its growth in leisure tourist arrivals has been sluggish in the past several years.

Uganda is clearly not yet realizing its full potential as a tourism destination. Its tremendous resource base allows it to offer a combination of safaris, primate tracking, adventure tourism, bird watching, and cultural tourism products. Yet, the sector has been hampered by gaps in its policy framework, leadership, coordination, and funding. As for the latter, the sector only receives 0.13% of the national budget while its total contribution to the country's economy has been estimated at US\$ 1.7 billion, or 9.0% of GDP.

Yet the tourism sector has gained some very important momentum recently. Tourism was designated as a primary growth sector in the National Development Plan and subsequently a stand-alone ministry, the Ministry of Tourism, Wildlife, and Heritage (MTWH), was created. MTWH is now in the midst of overhauling its policy framework. The tourism and wildlife policies are currently under review, while UNDP has pledged to support preparation of a new tourism master plan and marketing strategy. Furthermore, new standards are being created for tourism service providers. As the MTWH staff is set to grow considerably, it will also be important to ensure it has an optimal institutional framework to support its portfolio.

One of the top priorities should be revamping the Hotel and Tourism Training Institute (HTTI). The capacity of tourism workers has been repeatedly cited as a key growth constraint. The most important institution for hospitality and tourism training is HTTI, where major structural and equipment upgrades are needed. Furthermore, staff capacity must be enhanced. Without support, the perpetually underfunded institute will not be able to produce a sufficient number of graduates with the skills the industry demands. This means that service quality will suffer, businesses will be forced to pay high fees for foreign labor, and career opportunities for Ugandans will be lost.

Conservation efforts should be prioritized to protect wildlife and their habitats. As nature tourism is Uganda's top draw, it is critical to protect the resource base. Recent indications of stagnation and even declines in some wildlife populations have created concern among stakeholders. Swift action against poaching is needed, as is more detailed research to better understand how to reduce human-wildlife conflict. Also, the Uganda Wildlife Authority (UWA) will need greater investment in infrastructure and equipment to help better protect natural resources and enhance the visitor experience. It will also be critical to ensure local buy-in by helping improve community tourism offerings and better targeting revenue sharing programs.

Negative images from the past must be replaced through marketing and public relations efforts. These old images of insecurity are now being reinforced by the Kony 2012 video. Yet, Uganda has also received tremendous accolades recently, including being named Lonely Planet's top global destination

for 2012. Short term priorities include a campaign broadcasting these accolades, as they have yet to be broadly disseminated. This should in part be possible through the recently-launched Presidential Initiative for Sustainable Tourism (PRESTO). Longer term priorities include activating the tourism levy, through which collection of bed-night fees can sustainably finance marketing campaigns. Key market segments must be strategically selected for more efficient and effective use of resources.

With key target markets in mind, Uganda's product base should be improved and diversified. Product development efforts should primarily focus upon enhancing the experience of markets with a natural affinity for Uganda. It will also be important to place emphasis on providing a high-quality yet cost-effective experience for independent and mid-range package tourists. New circuits should be created to include under-visited natural, cultural, and religious attractions such as those in Eastern Uganda.

Infrastructure improvement and expansion will also be critical for tourism development. Improved transport links within and to Uganda are crucial. Significant gaps in road access to major tourism sites still exist. The possibility of receiving international flights into the Albertine Rift should be studied. Expansion of electricity and ICT networks into more remote tourism destinations would also be highly beneficial for attracting more investors and tourists.

To successfully address these issues, increased collaboration will be essential. First, a multi-stakeholder platform is needed to improve communication among the public sector, private sector, NGOs, and local communities. Platforms are also needed to increase cooperation across ministries and within the donor community. These should help promote efficiency of efforts while limiting overlaps. Finally, opportunities for more public-private partnerships should be pursued.

I. Introduction

Background

Occupying the strategic confluence of East African savanna and Central African forest, Uganda offers a highly compelling combination of wildlife safaris and primate tracking. Combined with the continent's highest mountain range, a source of the Nile, and African Great Lakes, Uganda undoubtedly has the raw materials necessary for a successful tourist destination. In fact, Uganda caught a glimpse of its tourism potential in the 1960s, when it was one of the top destinations in Africa. However, visitation all but ceased during the decades of instability and insecurity that followed.

As security conditions have stabilized over the past decade, investment and visitation have steadily increased. The sector's impact on the economy is already quite significant. The sector's total contribution¹ to the economy is estimated at US\$1.7 billion, representing 9.0% of GDP². Its direct and total contribution to employment is 225,300 and 522,000 jobs, respectively³. The tourism sector (US\$662 million in 2010⁴) only trails "remittances from abroad"⁵ (US\$773 million in 2010⁶) for generation of critical foreign exchange.

Yet, compared to its neighbors, Uganda is underperforming. Kenya and Tanzania are generating US\$4.5 and US\$3.4 billion from tourism, respectively⁷. In fact, if we examine the leisure tourism market in East Africa, Uganda has only 6.9% of the market share. While it is starting to catch up to its neighbors, Uganda's pace has slowed in the past several years. Given its impressive resource base, the country's tourism sector is far from realizing its potential. The sector's continued lag can be attributed to numerous challenges described in this document. These include limitations in the sector's policy framework, leadership, coordination, and funding. With regards to funding, MTWH was only allocated 0.13% of the government's total FY 2011/12 budget⁸. To put this into perspective, the government invested mere US\$4.5 million⁹ into an industry that during the previous year had contributed US\$1.4 billion to the economy and generated US\$662 million in foreign exchange.

At this moment, Ugandan tourism is at a crossroads. Tremendous opportunities have recently emerged. The tourism sector, which was named a primary growth sector in the 2010/11-2014/15 National Development Plan (NDP)¹⁰, once again has its own ministry. Lonely Planet, perhaps independent tourists' most trusted information source, has named Uganda its top destination for 2012¹¹. In fact, a half dozen trusted publications have recently provided important acclaim to Uganda, which celebrates its 50th anniversary of independence this year. Furthermore, the recently launched Presidential Initiative for Sustainable Tourism (PRESTO) has been created to provide the sector with a quick boost.

Yet the sector still faces major challenges. The Kony 2012 video, already viewed by over 100 million people worldwide¹², threatens to overshadow the accolades and reinforce negative images already in the minds of many potential visitors. Oil exploration in Murchison Falls National Park (MFNP) and Queen Elizabeth National Park (QENP), if not done in a highly responsible manner, could pose problems

for the country's image and some of its top tourist attractions¹³. Additionally, slumping economies in Europe and North America mean that competition with other East African destinations will intensify¹⁴.

Now is the time for Uganda to take decisive action to capitalize on the unique opportunities and address the challenges that threaten tourism growth. Success in this endeavor can only be achieved through strong collaboration between the public and private sectors as has been the case in nearly every global tourism success story.

Objective of this Assessment

This rapid situational assessment was conducted upon the request of the Ministry of Tourism, Wildlife, and Heritage (MTWH) and made possible through support from a UK Department for International Development (DFID) Trust Fund. MTWH, in partnership with the United Nations Development Programme (UNDP) and World Tourism Organization (UNWTO), intends to soon initiate a comprehensive tourism master planning process. Therefore this document primarily focuses on practical recommendations that can be implemented during the period before the tourism master plan is finalized. It is also anticipated that elements of this document will help create the foundation for the tourism master plan.

This document is not intended to serve as a comprehensive study of the sector, as several extensive reports and plans have been produced in recent years. In 2006 alone, the USAID-funded Strengthening the Competitiveness of Private Enterprise (SCOPE) project created a tourism competitiveness plan (2005-2015)¹⁵; the United Nations Conference on Trade and Development (UNCTAD) financed an ecotourism assessment¹⁶; and the World Trade Organization (WTO) produced a detailed Diagnostic Trade Integration Strategy (DTIS)¹⁷ for the tourism sector. In the past year, several other studies have been conducted, including the International Trade Centre's (ITC) "Inclusive Tourism Opportunity Study"¹⁸.

Fieldwork for this assessment was conducted over a period of three weeks in late February and early March, during which time over 50 tourism stakeholders from the public sector, private sector, civil society, and donor community were consulted (see list of meetings in Annex 1). Based on these meetings and an extensive literature review, this document was drafted expeditiously so as to provide "just-in-time" support to the new ministry and sector at large. The document will later be augmented by findings from an economic valuation study that is being undertaken by the World Bank. This study will be based upon results from low (April) and high-season (August) exit surveys of tourists being conducted by MTWH, the Uganda Bureau of Statistics (UBOS), and the World Bank.

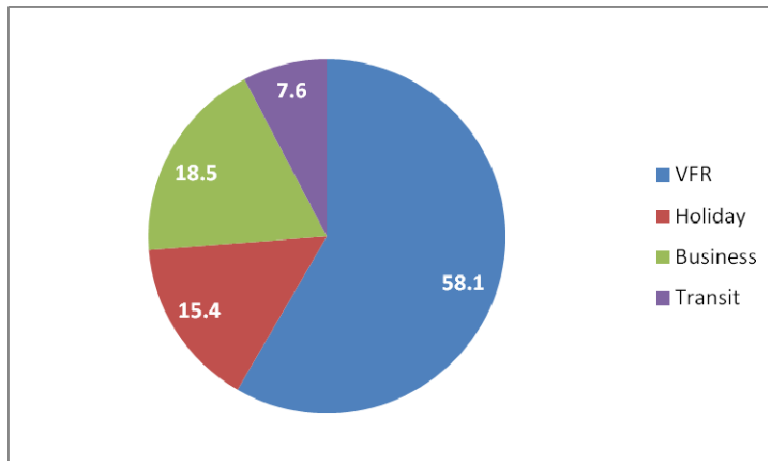
II. Sector Performance

1. Tourist Arrivals

International tourist arrivals to Uganda have more than quadrupled over the past decade¹⁹, from 205,000 in 2001²⁰ to 945,000 in 2010²¹. For a deeper understanding of tourism trends, however, it is

important to look at arrivals segmented by purpose of visit: leisure or “holiday tourists”, “visiting friends and relatives” (VFR), “business”, and “transit”.

Figure 1: Tourist Arrivals by Purpose (2010)

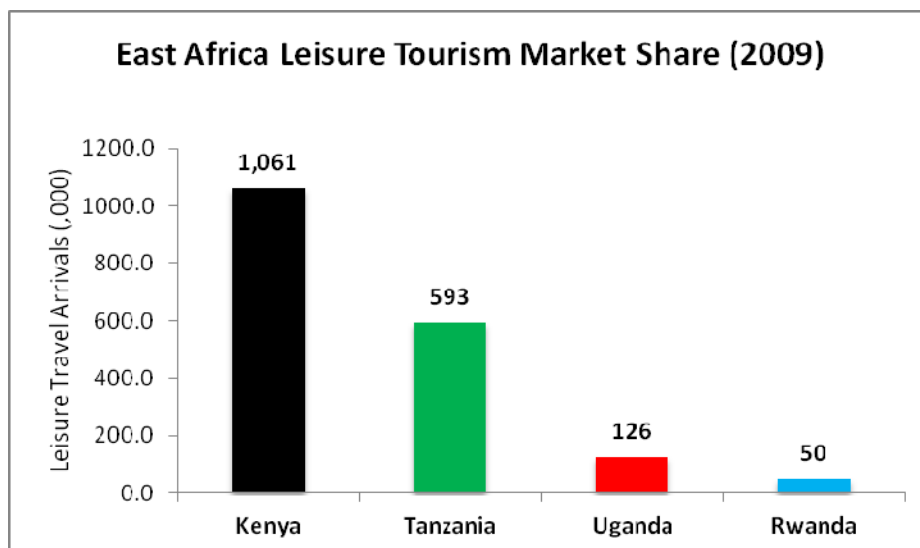


Sources: UBOS (2011)

According to UBOS, leisure tourists only represented 15.4% of all international arrivals to Uganda in 2010 (see Figure 1).²² This corresponds to a figure of only 149,000 international leisure tourists. Yet leisure tourists are coveted above other types of tourists, as they tend to stay longer and spend more money (Table 8 in Annex 6 provides a brief description of Uganda’s principal types of leisure tourism).

Within the East African context, Uganda’s number of leisure tourists is very small, as can be seen in Figure 2²³.

Figure 2: Regional International Leisure Tourism Market Share



Source: World Bank Sub-Saharan Africa Tourism Database (2012)

Note: Figures were taken for 2009, the last year for which complete data sets are available for all four countries; Burundi is not included, as the country has not published official arrival figures since 2006

Uganda's number of leisure tourists gives it a mere 6.9% market share among the four principal tourism destinations in East Africa. Furthermore, Uganda has not been particularly effective in closing the gap over recent years. From 2007-2010, international leisure tourists to Uganda only grew from 140,000 in 2007 to 149,000 in 2010. This represents an average annual growth rate of only 2.9%²⁴. During this same period, Rwanda experienced an average annual growth rate of 67%²⁵, albeit from a lower baseline figure (from 21,000 international leisure tourists in 2007 to 68,000 in 2010)²⁶.

2. Average Length of Stay and Expenditures

A 2011 exit survey conducted by ITC, based upon a relatively small sample size of 335, found that tourists stay in Uganda an average of 6.5 days, spending US\$132 per day. Overlaying this data upon official UBOS arrival figures, ITC estimates total visitor expenditures of US\$778 million for 2010²⁷. This figure is close to UNWTO estimate of US\$784 million²⁸. A more extensive exit survey currently being conducted by MTWH, UBOS, and the World Bank should produce more comprehensive figures²⁹.

3. Contribution to GDP

Tourism's direct contribution to GDP in 2011 was estimated at roughly US\$800 million. This represented 4.0% of total Ugandan GDP. To put this in a regional perspective, tourism represented 3.3% of Rwanda's GDP, 5.0% of Tanzania's GDP, and 5.7% of Kenya's GDP. Tourism's total contribution to GDP, which incorporates indirect and induced impacts, stood at US\$1.7 billion in 2011. This was equivalent to 9.0% of total Ugandan GDP. Corresponding figures for Rwanda, Kenya, and Tanzania were 8.4%, 13.7%, and 13.3%, respectively.

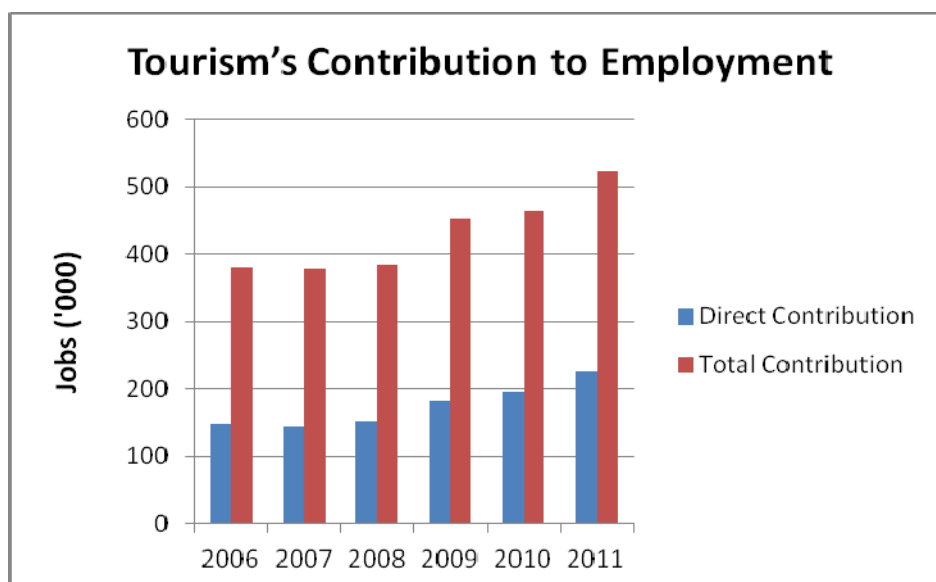
4. Tourism Service Providers

In 2009, there were 1,138 accommodations establishments registered in Uganda³⁰. A sample of 72 establishments taken in 2008 revealed an average occupancy rate of 30.1%.³¹ The number of tour operators can be approximated by looking at the Uganda Tour Operators Association (AUTO) membership base of 49. More detailed information on accommodations and tour operators is currently being collected by MTWH in the first comprehensive tourism service provider study since 2002. Findings should be available by July 2012.

5. Employment

The World Travel & Tourism Council (WTTC) estimates that the Uganda tourism industry directly contributed 225,300 jobs in 2011, with the figure rising to a total of 522,700 jobs when factoring in those indirectly supported by the industry (see Figure 3)³². These figures represent 3.4% and 7.9% of the Uganda workforce, respectively.³³ Over the past six years, direct employment has increased a total of 52.5% while total employment has increased a total of 37.5%³⁴.

Figure 3: Tourism’s Direct and Total Contribution to Employment: 2006-2011 (‘000)

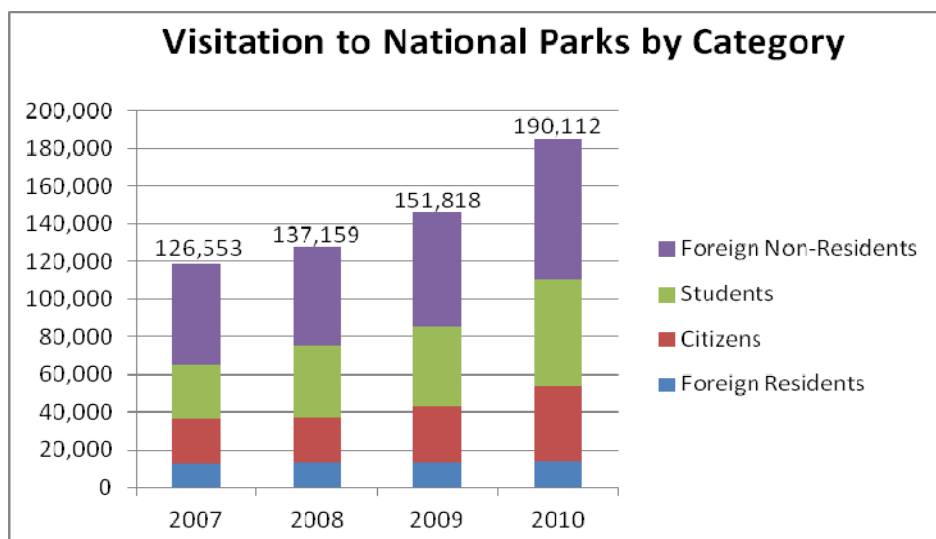


Source: WTTC (2012)

6. National Park (NP) Visitation

Visitation to Uganda’s NPs, the country’s principal tourism draw, increased from 126,553 visitors in 2007 to 190,112 in 2010³⁵. This represents total growth of exactly 50% over the four-year period. This growth has been driven in large part by foreign non-residents³⁶, with some important increases also being seen within the student and citizen (domestic) markets (see Figure 4). The 25% rise in overall visitation from 2009 to 2010 is particularly notable.

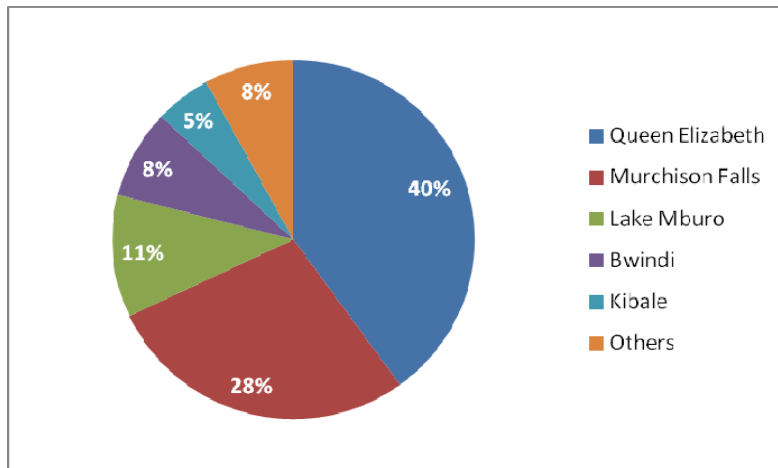
Figure 4: Visitation to National Parks by Category: 2007-2010



Source: UBOS (2011)

Yet visitation was fairly uneven across the country’s ten NPs. In fact, half of the NPs accounted for 92% of all park visitation, as can be seen in Figure 5 below.

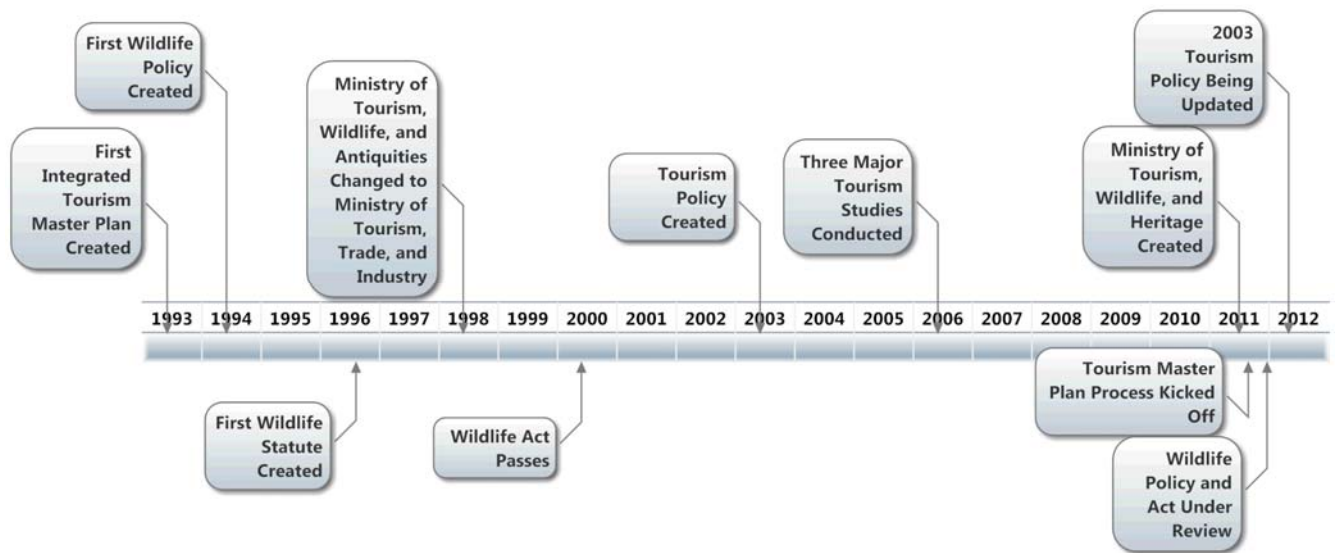
Figure 5: Distribution of National Park Visitation (2010)



Source: UBOS (2011)

III. Key Issues

1. Policy and Planning



In June 2011, tourism regained its status as a ministry-level sector with the formation of MTWH. It had previously been part of the Ministry of Tourism, Trade, and Industry (MTTI). Prior to MTTI’s formation in 1998, the sector was governed by the Ministry of Tourism, Wildlife, and Antiquities (MTWA). MTWA

was responsible for creating the first Integrated Tourism Master Plan. MTTI created the 2003 Tourism Policy³⁷, which is currently being revised by MTWH. Through UNDP funding, MTWH and UNWTO will create a tourism master plan in 2012, as well as a replace the marketing strategy that expired in 2008. UNDP is also helping to implement elements of the Tourism Act, which was ratified in 2008 but has yet to be implemented.

RECENT PROGRESS:

The newly created MTWH, in addition to initiating the revision of major policy documents, is also near finalizing new standards and classification regulations for accommodations, restaurants, tour guides, and tour operators. Additionally, MTWH launched a Ugandan tourism police unit in early March. Finally, MTWH has taken some admirable strides in tourism data collection. This year it is conducting a comprehensive survey of service providers for the first time since 2002. In April 2012, MTWH teamed up with UBOS and World Bank to initiate its first extensive tourist exit survey (low and high-season) since 2003.

PRINCIPAL CHALLENGES:

- **Virtually No Tourism Capacity in Local Governments**

There are few, if any tourism-reliant countries with so little presence of tourism experts at the sub-national level. Uganda, with just one exception, has no tourism officers even at the district level. In most districts with some tourism activity, officers from other departments, such as commerce and natural resource development, are assigned to cover tourism. Yet they have limited time and tourism knowledge. As such, tourism issues are rarely addressed adequately at the local level, even in districts where tourism represents one of the principal economic activities.

- **Some Overlap of Functions May Exist within MTWH**

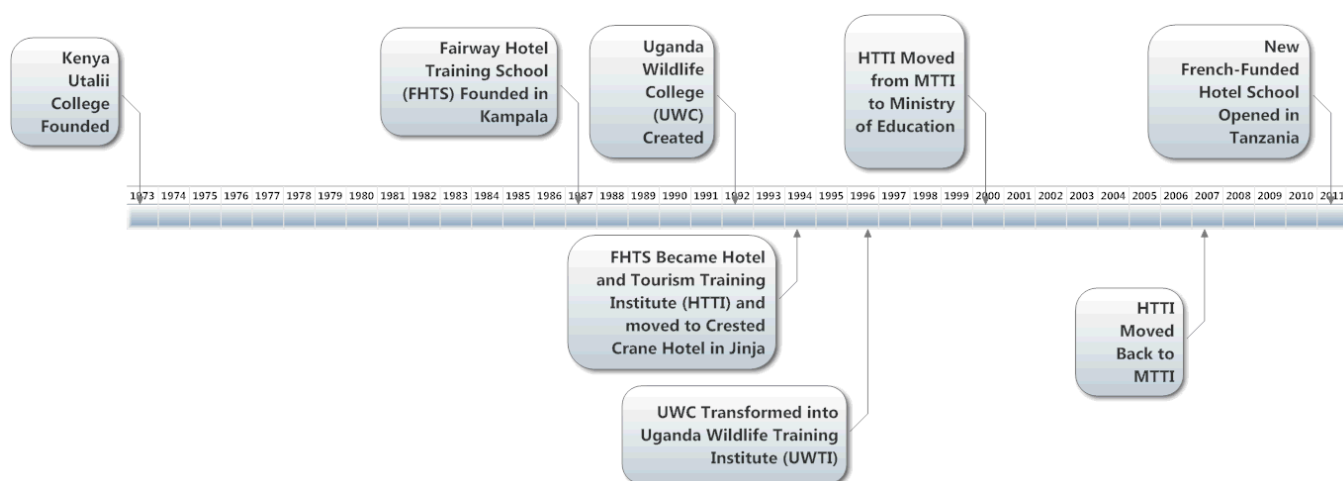
In addition to MTWH's three departments (Tourism Development, Wildlife Conservation, and Museums & Monuments) and various units, the ministry encompasses six other bodies: Uganda Wildlife Authority (UWA), Uganda Tourist Board (UTB), Hotel and Tourism Training Institute (HTTI), Uganda Wildlife Training Institute (UWTI), Uganda Wildlife Education Centre (UWEC), and Ngamba Island Chimpanzee Sanctuary (the MTWH Organizational Chart can be found in Annex 2). Within this large structure, there may be some overlap of tasks--particularly in areas such as marketing, training, and research. With MTWH's headcount set to increase, it will be important to thoroughly examine how to maximize staffing efficiency.

- **Lack of Consistent Statistics Collection Efforts**

The 2011 Travel and Tourism Competitiveness Index (TTCI) ranks Uganda 119 (of 139) in "comprehensiveness of annual travel and tourism data"³⁸. Until 2012, the last set of comprehensive studies of tourism service providers was conducted in 2002 and the last exit survey³⁹ in 2003. As for the former, these are currently being undertaken by MTWH. As for the latter, MTWH teamed up with UBOS and the World Bank to conduct low season surveys during the last

three weeks of April 2012. To capture a complete data set, high season surveys will be conducted in August. The results will help paint a more complete picture of tourism’s contribution to the national economy. They will also inform MTWH on the spending patterns and yields of various market segments. Nevertheless, the value of findings from such efforts is significantly diminished if not performed and repeated consistently.

2. Skills Development



Many Ugandan tourism stakeholders mention human resource capacity as the sector’s top constraint. In fact, the TTCI rates Uganda 114 and 115 (of 139) in “education and training” and “availability of qualified labor”, respectively⁴⁰. Skill gaps translate into reduced private sector competitiveness in that service quality suffers and, in many cases, expensive foreign labor must be recruited. As such, opportunities for employment and career advancement of Ugandans are limited. This is especially the case for women, who generally represent the majority of hospitality workers. Further, the shortage of skilled workers translates into a significant deterrent for attracting investment that is essential to the sector's economic productivity and sustainability.

To help improve tourism service levels, the government created a hotel school in Kampala in the mid-1980s. In 1994, it moved to the Crested Crane Hotel in Jinja and became the Hotel and Tourism Training Institute (HTTI). Yet HTTI has continually lagged far behind regional standard-bearer Kenya Utalii College, largely due to a lack of resources. The government requires the perpetually underfunded school to take in more students every year without increasing its budget accordingly. HTTI had been briefly supported by the World Bank-funded Protected Area Management and Sustainable Use Project (PAMSU) but access to this funding was lost when HTTI moved from MTTI to the Ministry of Education in 2000 (further information on HTTI can be found in Annex 3). The government also created the Uganda Wildlife College (UWC) in 1992, primarily to enhance knowledge of rangers and tour guides. It was then transformed into the Uganda Wildlife Training Institute (UWTI) in 1996.

PRINCIPAL CHALLENGES:

- **HTTI Unable to Produce Enough High-Quality Tourism and Hospitality Workers**

While there are also privately-run vocational schools in the country that offer tourism and or hospitality courses, HTTI is still the most prestigious and the largest source of workers for the country's hotels and tourism businesses⁴¹. Yet HTTI, working out of a hotel built in the 1950s, lacks modern facilities and equipment. Also, its staff members, already too few in number, need to have their knowledge and technical skills refreshed. Despite these needs, HTTI's budget was actually reduced last year from 500 to 400 million UGX (from roughly US\$200,000 to US\$160,000 USD)⁴². If improvements are not made, Uganda is in jeopardy of losing more jobs to foreigners with the impending opening of EAC borders under the new common access labor laws. Kenyans are already filling a large portion of Uganda's general manager, head chef, equestrian tour operation, and other high-earning positions⁴³. Additionally, HTTI would like to offer courses in growing areas such as event management, adventure tourism, and transport & logistics. Yet it lacks the staff capacity to do so. HTTI's shortcomings affect women disproportionately, as they currently make up 69% of the student body⁴⁴.

Some of HTTI's needs may be addressed through a project pending funding from the Enhanced Integrated Framework (EIF). Over three years, roughly US\$3 million would be provided to build instructor capacity, construct ten demonstration hotel rooms, and upgrade kitchen and laundry equipment.

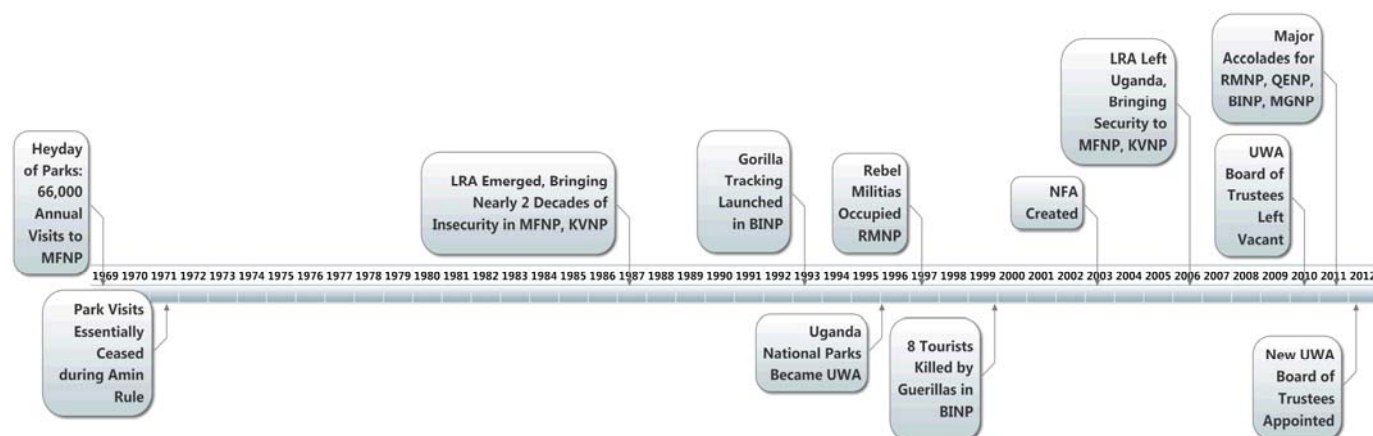
- **UWTI also Faces Serious Constraints**

These constraints are both physical and capacity related. UWTI's infrastructural and equipment needs are said to include staff quarters and vehicles, each exacerbated by the institute's remote location in QENP. To some extent, the location also limits its ability to attract top instructors. The current staff's capacities also need to be expanded, including in specialized areas such as bird watching and butterfly identification. The institute's ability to conduct critical wildlife research is also limited.

- **Capacity Gaps within MTWH and UTB**

Staff across MTWH's various departments and agencies have indicated a need to upgrade their knowledge and skills in some specific areas. One of the most commonly cited gaps relates to UTB's marketing capacity, including areas such as electronic/social media and market research. Other areas that have been mentioned include destination management, product development, tourism statistics, and heritage preservation within MTWH and conservation/wildlife research within UWA.

3. Conservation



In the 1960s, Uganda's conservation areas were among the most visited in Africa. They then faded into obscurity during the decades of insecurity and mass poaching that followed. The 1990s saw a resurrection of nature tourism, with gorilla tracking opening in 1993⁴⁵. Yet national parks such as Bwindi Impenetrable National Park (BINP), Rwenzori Mountains National Park (RMNP), Kidepo Valley National Park (KVNP), and MFNP still suffered from periodic violence caused by the Lord's Resistance Army (LRA) and regional conflicts. Security has returned to all of those areas, but turmoil within UWA in 2010 continued to hamper conservation and tourism development efforts. With a newly appointed Board of Trustees, UWA now hopes to move on from the period of instability and capitalize on some of the accolades that RMNP, QENP, BINP, and Mgahinga National Park (MGNP) have received in the past year. To achieve long-term success, it will be critical to find solutions to the human-wildlife conflicts that are still pervasive in many conservation areas.

RECENT PROGRESS:

UWA is now stabilizing, most notably with the March 2012 appointment of a new Board of Trustees appointed after year and a half vacancy. UWA is currently making important progress on updating general management plans (GMPs) for several NPs. It has also redesigned its website, which was officially launched in May 2012. Another important initiative is a pilot program it has initiated in QENP to improve revenue sharing with communities. UWA will soon be receiving technical support in areas such as fee collection mechanisms and concession strategies through a newly-created USAID program.

PRINCIPAL CHALLENGES:

- **Some Stagnant and Even Declining Wildlife Figures**

Official UWA figures show some wildlife populations to be growing, with others essentially stagnant and some declining (see Table 5 in Annex 4). Figures recently presented by the Auditor General to Parliament, while subject to debate, have highlighted declines in some species within specific national parks (see Table 6 in Annex 4)⁴⁶. While figures and perspectives seem to be somewhat divergent, clearly more needs to be done to promote the health of wildlife populations

and their habitats. Poaching is thought to be the predominant cause of stagnant or dwindling populations, following recent trends from elsewhere in East Africa. Yet, research gaps in Uganda prevent a more thorough understanding of the current situation. Environmental management practices also need to be examined. While the primary focus has been within protected areas, environmental management is also critical in areas adjacent to parks, as these form part of the ecosystem, facilitate movement of animals, and are often the convergence point of wildlife and human populations.

- **Major Infrastructure and Equipment Gaps in National Parks**

UWA's financial performance has improved markedly in recent years, as can be seen in Table 1. Over the five-year period between fiscal year 2005/2006 and 2009/2010, revenues increased by 219%⁴⁷. During this period, recurrent expenditures increased by 60%. By 2009/2010, revenues covered 80% of recurrent expenditures and 70% of the total budget⁴⁸.

Table 1: UWA Expenditures and Revenues: 2005/2006-2009/2010

Fiscal Year	Total Revenue	Recurrent Expenditures (billion UGX)	Capital Expenditures (billion UGX)	Total Expenditures (billion UGX)	Revenue/ Recurrent Expenditures	Revenue/ Total Budget
2005/2006	8.8	15.1	17.5	32.5	59%	27%
2006/2007	10.8	18.4	20.5	38.9	59%	28%
2007/2008	13.3	17.4	14.2	31.6	77%	42%
2008/2009	17.1	19.6	21.2	40.7	87%	42%
2009/2010	19.3	24.1	3.4	27.5	80%	70%

Source: UWA (2012)

Yet it is important to note the sharp decline of capital expenditures in 2009/2010⁴⁹. This was largely a result of the PAMSU project finishing. Capital expenditures are needed to fill the major infrastructure and equipment gaps that currently exist. These gaps can be attributed to ageing of current infrastructure and equipment, strains created on existing facilities due to increased visitation, and newly emerging needs caused by climate change⁵⁰.

- **Insufficient Benefits for Communities around Conservation Areas**

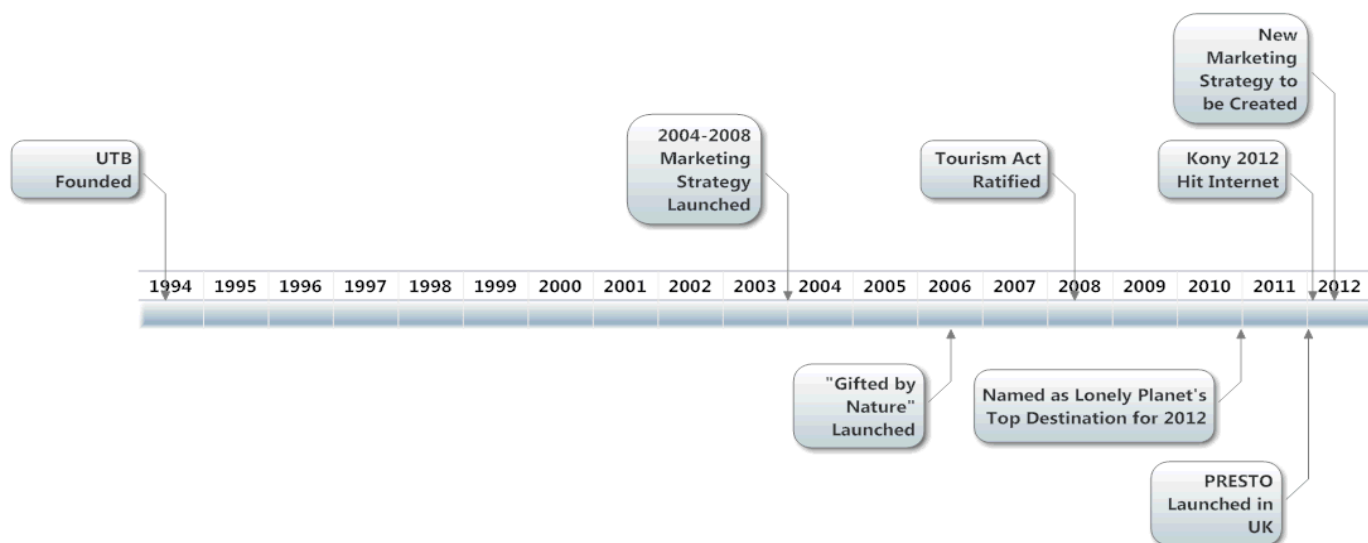
Conservation is highly dependent upon communities, which must have an incentive to protect their natural resources. Tourism can serve as a strong incentive and community-based enterprises are increasingly earning revenues through offerings such as guesthouses, restaurants, village tours, swamp walks, and craft shops. Community tourism has been supported since 1998 through the Uganda Community Tourism Association (UCOTA)⁵¹. While UCOTA has been instrumental in the development of numerous community-based tourism enterprises (CBTEs), many still lack the levels of quality required by tour operators. It is also worth noting that community tourism is an especially important source of employment and revenue for women: of the 2,901 people working within one of the UCOTA-affiliated CBTEs, 63% are women⁵².

Important incentives also come from the revenue sharing scheme that entitles communities to 20% of national park entrance fees. Yet this program has seen mixed results. The most problematic element is that money is spread across a very wide area, with little going to communities where human-wildlife conflict is most pervasive⁵³. As such, benefits to these communities are often insufficient to prompt adequate conservation. A new UWA pilot program in QENP aims to provide more targeted revenue distribution.

- **Oil Exploration in MFNP and QENP**

Oil exploration in the country’s two most visited parks could have significant impacts on wildlife conservation and tourism. In the wildlife-rich Delta area of MFNP, the effects of drilling can be minimized if appropriate, environmentally-friendly technology is utilized by concession holder Total. There are hopes that wildlife can thrive in the area to the east of the Delta. This would create a new tourism focal area, but would require new game tracks and infrastructure⁵⁴. In QENP, Tullow Oil is in the early stages of oil exploration in Ishasha, home of the famed tree-climbing lions. As yet there has been no indication of findings.

4. Branding & Marketing



Dictatorships, civil war, and regional violence have taken their toll on Uganda’s image. While these are a product of the past, negative images still pervade. This can at least partially be attributed to limited marketing resources. Past projects funded by USAID and the EU provided assistance in the form of a new slogan “Gifted by Nature”, marketing representation abroad, and new promotional materials. Yet these projects had finished by 2007. The 2008 Tourism Act seemed to provide a sustainable marketing solution through the tourism levy, which calls for collection of money for marketing through a tax paid by hotel guests⁵⁵. Yet, the levy has not been implemented. Perhaps not surprisingly, the 2011 TTCL ranks Uganda well below its regional competitors in “effectiveness of marketing and branding”: 82⁵⁶ compared to 3 for Rwanda⁵⁷, 19 for Kenya⁵⁸, and 74 for Tanzania⁵⁹. Right now the country’s image

hangs in the balance as the designation as Lonely Planet’s top destination of 2012 and other acclaim is forced to compete with the fallout from the Kony 2012 video⁶⁰.

RECENT PROGRESS:

Over the past year, Uganda has received some tremendous accolades:

Accolade	Source
Top Destination for 2012	Lonely Planet
Virungas: One of 20 Must-See Places for 2012	National Geographic Traveler Magazine
Bwindi: Best African Birding Destination (2011)	Travel Africa Magazine
Rwenzori Mountains: One of World’s 15 Best Hikes (2011)	National Geographic Society
45 Places to Go in 2012	New York Times

Source: Musasizi, S. (2012) and New York Times (2012)

The February 2012 launch of PRESTO signaled impending government investment in marketing and image building of the country. Then in March 2012, UTB unveiled an impressive display booth voted third best from Africa at the ITB Tourism Trade Fair in Berlin. UTB has also recently secured key donor support from USAID and UNDP for marketing efforts such as UTB web portal, promotional materials, and the “7 Wonders of Uganda” campaign.

PRINCIPAL CHALLENGES:

- **No Sustainable Marketing Mechanism**

Uganda’s annual tourism marketing budget of around US\$300,000 is very low, even in the East African context where Kenya , Tanzania, and Rwanda’s annual marketing budgets are US\$23 million, US\$10 million, and US\$5 million, respectively⁶¹. A tourism levy, such as the one that has been successfully implemented in Kenya to support its marketing efforts, was agreed upon by key stakeholders and incorporated into the 2008 Tourism Act. Yet to date the levy has not been enacted. One reason is that while the relevant authorities delayed in determining an implementation mechanism, the districts quickly stepped in and started to charge a hotel tax (US\$1 or US\$2 depending on the hotel standard). Then attempts to add on the tourism levy were blocked by MOFPED in fear of over-taxing tourists. Meanwhile, districts are reportedly not using the collected funds for tourism-enhancing activities.

- **No Clear Strategy on Target Markets**

Marketing requires a focus on strategically selected target markets. Selection should be based on extensive market research that indicates potential yields (revenue and employment generation) set against the cost and difficulty of attracting the market segment. Such targeting becomes all the more important when marketing resources are limited. Neither the current tourism policy nor UTB’s internal marketing strategy clearly prioritizes specific market segments or products.

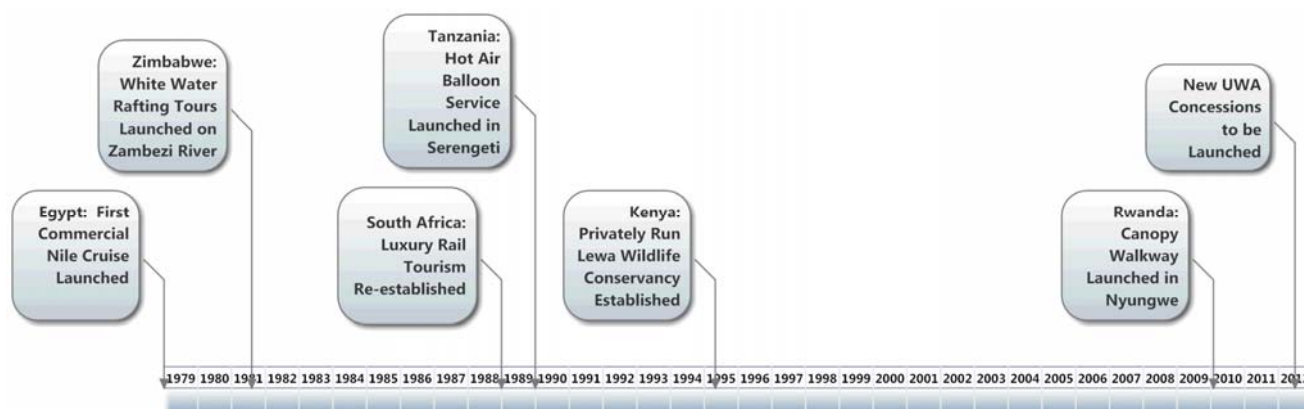
- **Lack of Brand Consistency**

Uganda currently does not have a clear brand, as evidenced by usage of multiple taglines. “The Pearl of Africa” was seemingly replaced by “Gifted by Nature” in 2006, but both are currently being utilized. The issue is now further complicated by the tagline of “Irresistible Uganda” recently coined by PRESTO⁶². Table 2 below contains taglines that have been consistently promoted and well-received in the marketplace.

Table 2: Successful Tourism Taglines

Country	Tagline
Malaysia	Malaysia Truly Asia
Costa Rica	No Artificial Ingredients
India	Incredible India
New Zealand	100% Pure
Tunisia	The Jewel of the Mediterranean
Belize	Mother Nature’s Best Kept Secret
Canada	Keep Exploring

5. Product Development and Value Chain



Uganda’s product offering does not yet match its extensive set of natural and cultural resources. Therefore, Uganda must act quickly to close the gap with better diversified regional competitors. The timeline above shows when other African countries successfully adopted products that could be created or expanded within Uganda. It also shows that UWA should soon be releasing a list of concessions, some of which having been held in a queue until the new Board of Directors was appointed (a provisional list of those currently being considered by UWA can be found in Table 10 in Annex 6)⁶³.

RECENT PROGRESS:

Private investors continue to build accommodations at a steady pace, particularly near NPs. These include MFNP and Kidepo Valley National Park (KVNP), which are both benefiting from an improved security situation. The fast-growing adventure tourism market is expanding through new products that

have recently or will soon come online, including speedboats, zip lines, river surfing, and rafting in MFNP. Community tourism products have also received a boost through UCOTA/USAID STAR training courses. Improved quality combined with the “Pearls of Uganda” marketing program has resulted in community tourism products increasingly being sold by tour operators. Communities should get continued support through the upcoming USAID program, as well as a UNDP-funded market linkages program through which UTB will partner with the private sector to help develop and support at least six community-based enterprises. Additionally, several new cultural heritage tourism initiatives are underway. The “Karamoja Culture Museum” was opened in March 2012, while a project to preserve and promote rock art in Kumi is nearing completion. Also, reconstruction of the Kasubi Tombs has recently been initiated.

Additional donor support for product development should come through recently announced programs from USAID and DFID/PSFU that will provide matching grant opportunities for the private sector, including tourism and hospitality businesses. Also notable was the official certification course provided by MTWH to 60 Uganda Safari Guides Association (USAGA) tour guides in February 2012⁶⁴. Finally, a major step in the realm of air transport was recently taken when Air Kenya was granted approval to begin flights from Entebbe to the Albertine Rift.

PRINCIPAL CHALLENGES:

- **Need for Improvement and Strategic Diversification of Tourism Products**

Some of Uganda’s current product offerings are not adequate or up to international standards. Furthermore, few examples of innovative tourism products can be found in Uganda. As Uganda looks to upgrade and diversify its products, it should primarily focus upon those which will serve proven markets such as nature tourists, adventure tourists, bird watchers, sport fishers, and faith-based tourists. The timeline above serves to highlight successful international products that could help Uganda become more attractive to such markets.

Other potential products mentioned by stakeholders include night safari walks with night-vision goggles, one to two-week ranger training courses geared towards experiential tourists, day-long wildlife experiential tours such as tracking and counting certain wildlife populations, high-end Lake Victoria ferry from Mwanza to Entebbe, tree-houses, mountain biking, and night game drives. Geographic diversification and greater dispersion is also important. In 2010, just two of the ten NPs (QENP and MFNP) captured 68% of all park visits (see Figure 5). It is important to emphasize that product development efforts should be led by the private sector, with facilitation and support from the government.

- **Country Still Not Well Suited for Foreign Independent Tourists (FITs)**

Despite being heralded as the top destination in 2012 by Lonely Planet, widely considered to be independent tourists’ most trusted information source, Uganda still lags behind countries such as Kenya, Tanzania, South Africa, and Namibia in terms of its appeal and accessibility for FITs. Studies conducted in several of these countries reveal that the FIT market has been the principal driver of

growth over the past few years⁶⁵. Better market segment data will be derived later this year through analysis of the Uganda exit survey, but the current hypothesis is that the FIT market can also stimulate significant tourism growth in Uganda.

One of the principal constraints for FITs is transportation, as individual car rental is expensive and public transport options are limited--especially to NPs. This idea was echoed in the ITC exit survey in which tourists were asked to rate their satisfaction in 13 categories. Tied for the second lowest average rating were "choice of transport options to destinations" and "value for money (tours/travel)"⁶⁶. Uganda's poor record for road safety is also an obstacle⁶⁷.

Another example of how the country is not well set-up for FITs is the gorilla permit acquisition process. There is currently no way for tourists to check availability or purchase permits online. This at least partially explains why 25% of gorilla permits went unsold in 2010⁶⁸ and consequently US\$2,191,000 in revenues was not realized⁶⁹.

- **Lack of Mid-Market Accommodations Options**

Several tour operators focusing on the high-end market are now diversifying towards the mid-range market. There are several reasons for this. First, the economic shocks of recent years have reduced high-end demand from the European and North American markets upon which Uganda largely relies. Second, the limited number of gorilla permits places a natural cap on the high-end market. While some new accommodations are being built for the mid-range market in Uganda, more are needed.

6. Infrastructure Development

Infrastructure provides the backbone for a country's tourism development efforts. It is critical for providing tourists with access to tourism sites and the basic services they need during their visit. Consequently, investment is hard to attract if adequate infrastructure is not in place. In Uganda, roads are improving but gaps remain, while air transport infrastructure is limited. Finally, a lack of electricity and ICT coverage represents another key constraint, especially to some of the more remote tourism destinations.

PRINCIPAL CHALLENGES

- **Some Key Tourist Roads Need Improvement**

The World Economic Forum's (WEF) 2011 TCI rates Uganda 119 (out of 139 countries) in "Quality of Roads"⁷⁰. While there has been improvement in recent years, some key tourism arteries are still in poor condition. Improved roads would not only enable efficient and comfortable passage of tourists, but also provide social and economic benefits for local populations. In October 2011, an assessment team with representatives from the Competitiveness and Investment Climate Strategy Secretariat (CICS), MOFPED, UWA, and USAID-STAR program identified six priority roads for improvement:

Kisoro to the Mgahinga Gate, Kisoro to Nkuringo, Kabale to Buhoma, Ishasha to Katunguru, Kyenjojo to Hoima, and Masindi to the Murchison Falls Gate⁷¹. Annex 5 contains a table showing the road lengths and costs, as well as a map highlighting each of the roads. Additionally, bridges such as those that pass through QENP are often in need of repair. Also signage indicating protected areas and other tourism attractions is limited along key routes. Finally, the lack of stop-over points on some routes can make journeys quite long and exhausting.

- **Limited Air Transport Options to the Albertine Rift Reducing Country's Competitiveness**

With time being the most valuable commodity for many travelers, the long distances between Kampala/Entebbe and the Albertine Rift attractions represent a competitive disadvantage for Uganda. While it takes travelers flying into Entebbe over 10 hours to reach gorilla tracking areas, the corresponding figure for those flying through Kigali is around three hours. As a result, visitors to Uganda are increasingly coming through Kigali. This leads to many missed economic opportunities for Uganda. Plans for regular regional flights between Entebbe and the Albertine Rift are highly encouraging. Yet having an international airport in the Albertine Rift would further reduce travel times and therefore make Uganda more competitive.

- **Gaps in Energy and ICT Provision**

According to MTWH, the lack of access to electricity is constraining tourism development in areas such as MFNP, BINP, MGNP, and the Kalangala Islands. High energy costs from generators or alternative energy sources serve as a deterrent to would-be investors and a financial liability for those currently operating in these areas. This situation results in decreased competitiveness for tourism businesses and by extension the country's tourism sector, often accused of offering little value for the tourist dollar. In national parks, high energy costs also represent a drain on UWA's resources. An inadequate ICT network also has adverse effects on the destinations mentioned above in addition to several other NPs. Business owners in these areas face either very high ICT costs or the inability to adequately respond to tourist inquiries.

7. Coordination and Public-Private Partnerships

The tourism sector is a broad and complex network of stakeholders from the public and private sectors, civil society, and donor community. Without close coordination, individual efforts will be far less effective. Some coordination efforts within the Ugandan tourism sector have been made in the past, but have not been sustained. The Tourism Coordination Committee (TCC) was formed in 2006 to provide a forum for all tourism stakeholders to regularly communicate and collaborate. Yet meetings were sporadic from 2007 until 2010, when they stopped altogether. Beyond coordination, there are cases in which the government and private sector can enter into mutually advantageous partnerships.

PRINCIPAL CHALLENGES

- **Inadequate Communication among Tourism Stakeholders**

The TCC served to keep stakeholders informed of new activities and initiatives, promoted

collaboration, and allowed for resolution of conflicts. Yet regular meetings soon became ad-hoc and then ceased entirely. This is attributed to a waning of political support, as well as insufficient funds.

- **Dormant Tourism Apex Body Limiting Communication Among Private Sector Groups**

The Uganda Tourism Association (UTA), comprised of ten tourism sector associations, was created to foster communication and collaboration within the tourism private sector⁷². Yet three years have passed since the last Annual General Meeting. Members have expressed frustration with the body's diminished role in the sector, which they attribute to the lack of a secretariat, inadequate leadership, and limited funding.

- **Lack of Coordination within Government on Tourism-Related Issues**

Tourism can only be planned and implemented effectively when there is coordination among the various ministries that play a role in the sector. Currently, no sustainable mechanism exists to coordinate activities such as training, land access, statistics collection, road and air transport infrastructure, marketing, tourism destination planning, and community tourism development.

- **Limited Donor Coordination**

Donor support to the sector has been fairly minimal since 2007, when major projects by the World Bank and the EU finished. The World Bank-funded PAMSU project focused primarily on infrastructural and capacity support to UWA, but also helped create the National Tourism Policy and provided technical and financial assistance to HTTI. The EU-supported Uganda Sustainable Tourism Development Programme (UGSTDP) focused primarily on marketing and product development activities.⁷³ Over the past five years, USAID has been the only donor to continue providing significant tourism funding.

However, since MTWH was created, there has been a resurgence of interest among donors. A non-exhaustive mapping of donor activities, both those currently running and those in the pipeline, can be found in Annex 7. In addition to the donors listed in the mapping, countries such as Japan, Canada, Sweden, South Korea, and Turkey have expressed preliminary interest in supporting the sector. With the growing number of current and potential projects, donor coordination is critical. In fact, there have already been several recent cases of overlap.

- **Public-Private Partnership (PPP) Mechanism Not Being Frequently Utilized**

NP concession agreements represent one of the few examples of PPPs currently being utilized within the tourism sector. Even within the realm of concession agreements, one could argue that some opportunities are not being seized. In some cases, UWA has retained management over accommodations that could be better managed by the private sector. Beyond concessions, other ways for the public and private sector to work together must be explored. It has been suggested that partnerships in the past have been constrained by a lack of trust or confidence between the government and private enterprise. Yet, for the sector to develop, the two must be closely aligned.

IV. Recommendations⁷⁴

1. Policy and Planning

IMMEDIATE-TERM

- **Evaluate MTWH Institutional Framework**

Over the next year, MTWH will be making important staff recruitment decisions that will likely affect the Ministry's performance for the next decade and beyond. At this critical time, it will be important to examine the roles of the various departments and agencies, as well as their capacity to carry out the associated tasks. Some of the issues to be further examined include:

- Does UTB currently have the capacity to handle the areas of "Standards and Quality Assurance" and "Product Development"?
- Should research/market intelligence be handled both by the Policy Analysis Unit and UTB?
- How can market research and statistics collection knowledge be upgraded?
- How can marketing functions of UTB, UWA, and PRESTO be better aligned?
- Should there be a central body that coordinates all training or should it be handled independently within each agency and department?
- How can internal coordination be assured among the rapidly expanding staff?

SHORT-TERM

- **Hire Tourism Experts for Strategic Districts**

Dedicated tourism officers should be hired within the 13 districts that were identified by MTWH as "tourism focal districts": Jinja, Kanungu, Kisoro, Kabale, Kasese, Kabarole, Kampala, Wakiso, Mbale, Kalangala, Masindi, Gulu and Arua. These experts could significantly strengthen efforts related to natural and cultural heritage resource mapping, destination development, statistics collection, local stakeholder coordination, accommodations licensing, and service provider training. Only qualified candidates with an education and or industry experience in tourism should be hired. Additionally, targeted training courses should be provided to prepare them for the specific tasks they will undertake.

MEDIUM TO LONG-TERM

- **Create Robust Tourism Information Management System (TIMS)**

The benefits of TIMS are manifold, as it can be used to measure tourism sector performance and changes over time, demonstrate the large economic value of tourism to policy makers, track and prioritize relevant market segments, make projections related to future tourism arrivals and expenditures, and provide up-to-date information to tourists. The system should include information in three categories: the country's tourism performance, its product inventory, and market intelligence. Performance information should include arrivals, expenditures, economic impacts, and satisfaction levels. This data can be generated through annual exit surveys and data

from immigration and the central bank. The inventory should include detailed information on hotels, tour operators, air and ground transport options, attractions, wildlife populations, etc. This data can be gathered by MTWH through annual service provider surveys, as well as by UWA through annual wildlife counts. Finally, market intelligence should include key statistics and trends in target countries and niche markets, data from competitors, and information about relevant marketing channels⁷⁵. Most of the information can be housed on the UTB website, while the more sensitive market intelligence findings can be placed on a password-protected intranet.

2. Skills Development

IMMEDIATE-TERM

- **Conduct MTWH Skills and Knowledge Needs Assessment**

This assessment, ideally conducted by an independent body, would help determine the skill and knowledge gaps among the staff of MTWH's various departments and agencies. It would serve as the basis for prioritizing internal training interventions. More weight should be given to technical interventions that align with the Ministry's specific priority issues.

SHORT-TERM

- **Upgrade HTTI Facilities and Capacity**

Nearly all of HTTI's students get absorbed into the workforce, which means that the overall quality of service in Uganda is directly related to the level of education received at HTTI. Clearly HTTI requires more funding to be able to expand the quality and quantity of its output. HTTI considers its major needs to be:

- Capacity building of faculty members
- Renovation of hotel
- Expansion of small training kitchen and training block
- Modern equipment for kitchen, laundry room, and classrooms
- Resource facilities such as a library, computer lab, and language lab

Targeted training courses would be extremely useful for faculty members to refresh their knowledge and skills. New facilities would provide students with the critical mix of relevant technical education and more hands-on skills demanded by hospitality and tourism businesses. The improved, more tourist-friendly facilities would also enable the school to generate additional revenue from hotel stays, events, and food & beverage operations in demonstration restaurant facilities. This would then allow the institute to hire more instructors and sustainably upgrade facilities and equipment in years to come. Some of the new instructors could cover subjects related to key emerging areas such as events management and adventure tourism. Some could also help HTTI take on the role of Examining Body for national-level hotel and tourism courses. In this role, HTTI would create and evaluate examinations of students from all private and public programs in the country, awarding certificates to those who pass.

Finally, it is recommended that HTTI establish relevant partnerships with one or more external international tourism training institutions to enable student exchanges, administration capacity building, and faculty development.

- **Look into Upgrading UWTI with Possibility of Adding Research Wing**

As a visit to UWTI was not possible during this rapid assessment, further study is required to determine the scope of support needed in terms of infrastructure, equipment, and staff capacity building. This seems particularly important in light of the new Wildlife Policy's recommendation to transform UWTI into the Uganda Wildlife and Research Training Institution (UWRTI). There is undoubtedly an urgent need for high-quality research, especially to better understand the decline of some wildlife populations. Yet, given the significant investment in facilities and researcher capacity building that would be required, feasibility of the initiative would need to be carefully assessed by UWA and weighed against other options such as creating such a facility in Makerere University or competitively bidding out individual research grants.

3. Conservation

SHORT-TERM

- **Undertake Research to Determine Cause of Wildlife Declines**

While some causes of wildlife stagnation or decline are known and can be acted upon immediately, others will require further research. The findings should then help UWA prioritize its resource allocations. They should also help UWA provide greater transparency to all concerned stakeholders. As part of the ongoing research, the effects of hunting should also be carefully studied. As mentioned in the Skills Development section, the idea of placing a permanent wildlife research facility within UWTI should also be explored by UWA among other options.

- **Upgrade Conservation Area Infrastructure and Equipment**

While new products should emerge through private concessions, conservation areas will still be left with major infrastructural and equipment gaps. Gaps in national parks have widened in the past several years due to the lack of capital investments (see Table 1). Forest reserves, which are managed by NFA, are also experiencing significant shortfalls in relation to infrastructure and equipment. There are several reasons why such investments are imperative. In some cases, the infrastructure and equipment will enhance the visitor experience and will therefore serve to boost revenues from tourism. In other cases, they will strengthen UWA and NFA's ability to protect conservation area boundaries from encroachment.

Several donor organizations are currently exploring the possibility of providing direct support to conservation areas. These include USAID, the Norwegian Embassy, and the World Bank. The gaps in infrastructure and equipment are substantial and therefore support from multiple donor organizations would be encouraged, assuming their efforts are well-coordinated. Additionally, support in QENP and MFNP can be petitioned from the oil exploration companies⁷⁶. Table 3 below

provides an illustrative, non-exhaustive list of needs and opportunities for selected national parks:

Table 3: Specific National Park Infrastructure and Equipment Needs and Opportunities

Park	Illustrative List of Needs
QENP	New safari tracks, new bird trails and hides, bridges and flat-bottomed boats for Kyambura Gorge crossings, vehicle for night game drives
MFNP	New safari tracks (outside Delta), upgraded or additional ferry, access roads to north bank of Nile for sport fishing, vehicle for day and night game drives, upgrade of Rabongo Forest cabins, additional patrol boats
BINP	Additional gorilla tracking trails
MGNP	Expansion of hiking trail network, search and rescue equipment
RMNP	Replacement of 2km of broken boardwalk, new trails and ladders near receding glaciers
LMNP	New headquarters
KVNP	Redesign and renovation of Apoka Village
Cross-Cutting	Upgraded and standardized park gates (with quality toilets, gift/refreshment shops, park offices, etc), more ranger outposts, improved signage, binoculars and communications equipment

- **Explore other Conservation Models**

UWA should consider two models that have produced wildlife conservation successes in other parts of Eastern and Southern Africa. The first is the creation of wildlife conservancies, either with private landholders or communities adjacent to protected areas. The conservancies would be supported through tourism and therefore create strong incentives for wildlife protection. In addition to reduction of human-wildlife conflict, they would ease the burden on UWA within the protected areas and provide another compelling tourism product for Uganda. There would seem to be potential for wildlife conservancies to the north and east of LMNP, the south of KVNP, and north of MFNP.

A second model would be a PPP through which portions of game reserves or national parks would be managed by NGOs or private entities. The managing entity would be required to restock and manage wildlife populations while ensuring strong community benefits. Such efforts would be supported largely through tourism revenues. Such an arrangement could generate additional revenues for UWA while reducing costs associated with wildlife conservation activities.

- **Scale-Up Revenue Sharing Pilot Program**

Taking lessons learned from the pilot program in QENP as well as international best practices, UWA should bring the program to other NPs where wide-scale human-wildlife conflict exists. It will be critical to ensure that the benefits are transparently allocated to communities most directly affected by wildlife. In each NP, it will also be important to collect extensive baseline data and then regularly monitor results. Ultimately, more targeted provision of benefits to communities will help reduce

human-wildlife conflict and therefore greatly enhance UWA's wildlife conservation efforts.

- **Encourage Oil Companies to Use Technologies that Mitigate Impacts on Environment**

Such technologies exist, along with international best practices on environmentally-friendly oil extraction. Yet these often entail higher expenditures. Therefore, appropriate legal frameworks are necessary, as are efforts to educate and mobilize local stakeholders. It is also critical that there be support at the highest levels of the Ugandan government, which must approve oil companies' major expenditures. The reason this arrangement was put in place is because oil companies and government divide profits—as such, higher costs impact profit margins for both entities.

4. Branding & Marketing

IMMEDIATE-TERM

- **Help Facilitate a Compromise on Tourism Levy**

Approval of the tourism levy will likely require a compromise on the conflicting hotel tax. A sensible process has been laid out by several tourism stakeholders. First, a brief study should be launched to understand the mechanisms and constraints of the districts' hotel tax collection system. Ideally, this would be accompanied by a presentation of international best practices on tourism levy collection.

Next, MTWH should ask State House or the Vice-President's Office to convene a meeting to discuss findings of the study and explore how both the local hotel tax and national tourism levy can be collected in an efficient and transparent manner. High-level representatives of MOFPED, the Ministry of Justice and Constitutional Affairs (MOJCA), MTWH, and the Ministry of Local Government (MOLG) should be present during the session⁷⁷. If a compromise is reached, the tourism levy should be able to provide a long-term solution to the marketing budget shortfalls that have plagued Uganda in the past.

- **Launch Marketing and PR Campaign**

While Uganda has received an impressive set of accolades in the past year, little has been done to publicize them more broadly. At the same time, the Kony 2012 video is adding to Uganda's image of insecurity. Additionally, Uganda's anti-homosexuality legislation has drawn protests outside Ugandan embassies abroad, at tourism trade fairs, and through numerous social media channels.

Uganda needs to immediately launch an aggressive marketing and PR campaign in order to reposition itself in the primary source markets of US, UK, and Germany and perhaps some fast-growing secondary markets such as Holland and Sweden⁷⁸ (see Table 9 in Annex 6 for source market sizes and growth rates). Targeted electronic and social media elements should be incorporated into the campaign to enhance reach and cost-effectiveness. The overall initiative should be implemented through a strong public-private partnership. For example, MTWH could invite prominent journalists to visit the country, with the private sector providing cost-sharing assistance.

Another possible funding source for the campaign is PRESTO. This initiative should provide a boost in awareness and visitation in the short-term, while laying a foundation for a longer-term change in Uganda's image abroad.

SHORT-TERM

- **Determine and Prioritize Key Target Markets**

A demand-driven approach to tourism must be employed. The exit surveys should provide valuable information regarding various market segments. Based upon this and broader market research, key target markets should be identified. The principal markets to examine would be mid-range package, high-end package, FIT, adventure, bird watching, sport fishing, domestic, foreign resident, faith-based, cultural heritage, MICE (Meetings, Incentives, Conferences, and Events), and SAVE (Scientific, Academic, Volunteer, Educational) tourists. Private and public sector consensus on this issue should then be sought through the marketing strategy creation process. The selection of target markets should influence subsequent decisions not only on marketing, but also product development and policy.

- **Redevelop National Tourism Brand**

MTWH is now firmly committed to the "Pearl of Africa" tagline and intends to use it as a centerpiece of forthcoming brand redevelopment efforts⁷⁹. The brand architecture should be created through a collaborative and highly-strategic process, based upon priority target market selection as described in the previous section. Images, themes, and values should all be determined for the brand during this process. An important output will be a new logo, which should replace the Tourism Uganda logo currently found on the country's official website (www.visituganda.com) and other marketing materials. Ideally, the redeveloped brand will be launched through an extensive communications and promotional campaign at both the international and national level. At the international level, it will help the country reposition itself among key target markets. At the national level, it should help achieve widespread buy-in and application of the brand among government agencies, the private sector, and local communities. It can also help stimulate domestic tourism, which is currently an underexploited market.

- **Hire Marketing/PR Firms for Representation in Key Source Markets**

After the initial campaign, long-term marketing/PR representation should be contracted in key source markets. Uganda, through the UGDSTP project, had representatives in the US and UK. It was felt by both the industry and UTB that such representation was highly beneficial, yet it was not continued after UGDSTP ended. It should be noted that Kenya has offices or representation in 15 primary and emerging source market countries⁸⁰. Even Rwanda has representation in the US and UK⁸¹. This initiative could be funded by UTB through tourism levy proceeds. Also, for those countries without representation, foreign service officers in Ugandan Embassies could be trained so they can ably represent the country's tourism sector at key events and meetings with potential investors and tour groups.

5. Product Development and Value Chain

SHORT-TERM

- **Create New Concessions Based on Target Market Strategy**

As mentioned in the Marketing & Branding section, product development efforts should be market-driven, based upon strategically selected target markets. NP concessions are no exception. Concessions allow for important generation of revenues for UWA through annual fixed fees paid by businesses and user fees paid by tourists (see ranges and averages of both types of fees in Table 11 of Annex 6), taxes for the national government, and local employment. NP concessions are easier to create when included in the park's GMP. Several parks such as MFNP, KVNP, and Lake Mburo National Park (LMNP) are currently revising their GMPs. As such, efforts should be made by UWA to ensure that the selected concessions are aligned with the country's marketing strategy.

- **Encourage Transport Options that Provide Easier and Less Expensive Access to NPs**

Reaching some NPs through public transport is very difficult. In other cases, it is impossible. Scheduled shuttle service to the parks would significantly alleviate costs for tourists, while providing a potentially lucrative business opportunity for the private sector. UWA would benefit in the form of increased park visitation, as well as a new market for day and night game drive experiences. Targets for the service would be price-sensitive FITs, as well as expatriates and domestic tourists who do not have their own vehicles.

- **Gorilla Permits: Refrain from Raising Fees and Offer Discounted Low Season Rates**

Rwanda has announced that gorilla permits will be raised from \$500 to \$750 as of June 1, 2012. As Rwanda has in the past few years sold nearly 100% of its gorilla permits, it clearly feels that the market will bear a price increase. There will be a temptation for UWA to also raise its fees when prices are reviewed in July 2013. Yet, recognizing Rwanda's strong competitive advantage with the high-end market, it would be advisable for UWA to refrain from raising its prices. This will in turn give Uganda a competitive advantage with more price-sensitive segments of the market, including many FITs, mid-range package tourists, foreign residents, and domestic tourists.

Furthermore, UWA may be able to increase the percentage of permits sold and therefore overall revenue by offering low season rates. This would appeal to the market groups mentioned above. UWA experimented with this strategy last year but was not entirely successful, largely because the plan was not announced far enough in advance. If announced at least six months in advance, the results will likely be better. It would be advisable to contract an economist to suggest a permit sale system that captures maximum revenues.

MEDIUM TO LONG-TERM

- **Streamline Gorilla Permit Process**

Real-time information on gorilla permit availability should be included on UWA's new website.

Eventually the website should also possess booking capabilities. These initiatives would likely help attract more FITs and lead to more permits being sold.

- **Help Develop Underutilized Eastern Route**

Eastern Uganda is rarely visited, yet has considerable tourism potential. KVNP offers quality wildlife viewing in a scenic, unspoiled atmosphere. Mt. Elgon National park (MENP) offers excellent opportunities for trekking, as well as world-class rock climbing and rappelling at Sipi Falls. Cultural opportunities along the route include the new Karamoja Culture Museum near Moroto, a Karamajong Village in the Pian-Upe Wildlife Reserve, and distinctive rock art in Kumi. A well-developed eastern route would have numerous benefits including increased length of stay of tourists, decreased congestion in more popular tourism areas, better distribution of tourism revenues, and more opportunities for private sector investment. MTWH and the private sector will each have an important role to play in developing this route.

6. Infrastructure Development

SHORT-TERM

- **Advocate for Upgrading of Strategic Tourism Roads**

The development of the priority roads listed in Annex 5 are all in line with the Uganda National Road Authority (UNRA) and national government plans. Additionally, the need to pave the roads from Hoima to Kyenjojo and Ishasha to Kanungu was mentioned during the 2010/2011 budget speech on June 10, 2010⁸². As such, MTWH and the private sector bodies under UTA should lobby at the highest levels to ensure these roads are upgraded as soon as possible. Efforts to repair bridges, improve signage, and add stop-over points on key tourism routes should also be undertaken.

- **Conduct Study on Feasibility of Upgrading Albertine Rift Airport for International Flights**

This study would help answer several key questions. The first relates to which airport would be most suitable for upgrading. The public airport in Kasese and private airport alongside Savanna Lodge are fairly sizeable and have been suggested as possible candidates. Other questions for the study would relate to estimated airport upgrade costs, economic impacts of having international flight service, and the likelihood of attracting regional carriers to fly the route. The study could perhaps be conducted through a partnership between MTWH and the Uganda Investment Authority (UIA). If feasibility is demonstrated, this could significantly increase Uganda's competitiveness as a tourism destination.

MEDIUM TO LONG-TERM

- **Work with other Government Agencies to Improve Electricity and ICT Provision**

Discussions should be held with the Ministry of Energy and Mineral Development regarding the extension of the electricity network to key tourism destinations. It is also worth advocating for the granting of subsidies or other incentives to businesses that install solar, wind, or micro-hydro systems. As for the ICT network, discussions should be held with the Ministry of ICT to see whether

several strategic tourism destinations could be incorporated into the Rural Communications Development Fund⁸³.

7. Coordination and Public-Private Partnerships

IMMEDIATE-TERM

- **Revive Tourism Coordination Committee (TCC)**

MTWH officials feel that it is critical to revive the TCC to enhance communication and cooperation within the sector. It has been suggested that the Permanent Secretary should delegate an official who can consistently represent MTWH and that representatives from key districts should also be included. To make the TCC effective and sustainable, there must be high-level support from the MTWH and an allocation of funds to cover venue and refreshment costs. If MTWH budgets do not allow for monthly meetings, the gathering should take place no less than once per quarter. Regardless of frequency, working groups should be formed to ensure follow-up on key issues between meetings.

- **Revitalize UTA**

The TCC will be more effective if the private sector can speak with a unified voice on key issues. A fully functional UTA will make this more likely. Members have suggested that UTA immediately call for an Annual General Meeting, during which a new Executive Committee should be elected. Besides a new set of committed leaders, it will be critical to establish a secretariat that will allow UTA to push forwards its agenda. For the sake of sustainability, funding for the secretariat should come primarily from annual membership dues. Additionally, PSFU has indicated that it may also be able provide support for select activities.

- **Establish Tourism Sector Working Group Within LDPG**

The Local Development Partners Group (LDPG) is a high-level policy forum comprised of mission heads of key donor organizations in Uganda. Chaired by the World Bank and supported by a secretariat, its objective is to increase effectiveness and facilitate coordination among the donor community. It contains several working groups covering themes such as “Environment and Natural Resources” and “Climate Change”. It is recommended that tourism become one such thematic working group. One option would be to have the tourism working group led by the World Bank, as has been recently suggested by MTWH. Overall, having such a mechanism would help reduce duplication of efforts, increase efficiency of assistance, and also likely encourage more donors to provide support to what would be considered as a well-coordinated sector.

- **Create Donor Coordinator Role within MTWH**

While donors must work to coordinate their activities within the sector, ultimately the responsibility should rest within MTWH. A donor liaison position should therefore be created. The officer filling this role would have close contact with the LDPG, as well as the TCC. Ideally the role would be filled by a senior-level technical officer within the Tourism Policy Analysis Unit. The donor liaison officer,

after filling in any current gaps in the donor map in Annex 7, should then regularly update and circulate the table.

SHORT-TERM

- **Establish Inter-Ministerial Tourism Committee**

International best practice suggests that an Inter-Ministerial Tourism Committee is critical to achieve the requisite level of coordination. In light of tourism's priority designation within the Uganda NDP, creation of such a committee would seem to be easily justifiable. According to key personnel within MTWH, the Inter-Ministerial Committee should ideally meet twice per year. Meetings could be chaired by the Prime Minister or the Vice President's Office, which recently offered a pledge of support to MTWH. Technical sub-committees should be formed for key issues such as statistics collection, training, land access, marketing, road and air transport infrastructure, energy and ICT infrastructure, tourism destination planning, and community tourism development. The sub-committees would be required to regularly report to the Inter-Ministerial Tourism Committee, which would undertake rigorous monitoring and evaluation of activities.

- **Explore Opportunities for More PPPs**

The increase in PPPs should begin with the mechanism that is most commonly being utilized currently: concessions. For the next round of NP concessions, UWA's board will be considering whether some may be developed entirely by UWA. International best practice indicates that this should only occur if the project would not be attractive to investors but would serve a public good.

This assessment has listed several other possibilities for PPPs. These include conservation conservancies in areas adjacent to protected areas, private management of portions of game reserves or national parks, and leasing of airport facilities in the Albertine Rift. Beyond the standard PPP model, this assessment has also indicated several other activities for which it will be important for the public and private sectors to work together. These include joint marketing activities, cost-sharing on familiarization trips, statistics collection, and implementation of the tourism levy. Some activities could be coordinated through the TCC, while others would entail a direct partnership between the government and private enterprises.

V. Action Plan for Priority Activities

Ten priority activities are outlined in Table 4, including suggestions on specific actions, time frames, lead organizations, and implementation partners. Focus has been placed upon the immediate to short-term activities that can be implemented in the next six to twelve months. This is approximately the amount of time that will elapse before the tourism master plan is created and approved.

Table 4: Top Ten Priority Actions for Immediate to Short Term

Activity	Specific Actions	Timeframe	Lead Body	Implementation Partners
Immediate Term				
Facilitate Compromise on Tourism Levy	<ol style="list-style-type: none"> 1. Conduct study of current district hotel tax collection and international best practices 2. Request high-level authority to convene meeting 3. Bring proposed solution to wider tourism stakeholder meeting to gain consensus 	June 2012-October 2012	MTWH	UTB, State House or PM Office or VP Office, MOFPED, MOLG, MOJCA, and possibly World Bank, UNDP, PSFU, UTA
Launch PR/Marketing Campaign	<ol style="list-style-type: none"> 1. Define key target markets and message 2. Contract highly reputable PR/Marketing firm(s) 3. Determine most effective channels 	June 2012-December 2012	UTB	UTA member associations, PRESTO
Revitalize TCC	<ol style="list-style-type: none"> 1. Achieve high-level buy-in to concept 2. Define membership of committee, meeting frequency, and working group areas 3. Find facilitation funds 	July 2012-October 2012	MTWH	UTA member associations, NGOs, training schools, donors
Create Donor Tourism Sector Working Group	<ol style="list-style-type: none"> 1. Determine group members and key issues to be addressed 2. Regularly liaise with MTWH to ensure coordination and alignment with government strategies 3. Assign "donor liaison" position with MTWH 	July 2012-September 2012	LDPG	World Bank, other members of LDPG interested in tourism, MTWH
Short Term				
Upgrade HTTI Infrastructure and Facilities	<ol style="list-style-type: none"> 1. Review existing HTTI donor funding proposal 2. Study facilities for structural integrity, suitability for plans to convert to 3-star hotel 3. Prioritize proposal items in light of study 4. Seek donor support 	July 2012-April 2013	HTTI	Possibly EIF, World Bank and other donors
Conduct Research into Wildlife Declines	<ol style="list-style-type: none"> 1. Assign unit to undertake research 2. Allocate resources for the research activity 3. Create mechanisms for follow-up research 	July 2012-May 2013	UWA	Possibly donors and UWTI
Define Priority Target Markets	<ol style="list-style-type: none"> 1. Analyze exit survey (low and high season) data to derive yields for each market segment 2. Determine ease, cost of attracting each segment 3. Weigh costs vs. benefits to make decision 4. Let decision drive strategies for marketing and product development 	September 2012-November 2012	UTA's members	UTB, World Bank, UNDP, UNWTO
Conduct MTWH and UTB Skills & Knowledge Needs Assessment	<ol style="list-style-type: none"> 1. Contract independent evaluator to determine specific areas of greatest need 2. Create a training plan, including course recipients, venue, length, and budgets 3. Identify entities that can provide high-quality training for each of the priority areas 	September 2012-November 2012	MTWH	Independent evaluation body
Upgrade National Park Infrastructure and Facilities	<ol style="list-style-type: none"> 1. Develop list of greatest needs in terms of improvement of tourism experience and ability to prevent illegal activities 2. Determine economic, environmental, and social impacts of each proposed item 3. Convene meeting of potential donors to determine how to best pool funding 	September 2012-July 2013	UWA	MTWH, possibly donors (WB, USAID, Norwegian Embassy, and others), oil companies (Total and Tullow)

Form Inter-Ministerial Tourism Committee	<ol style="list-style-type: none"> 1. Seek high-level backing for committee creation 2. Determine committee members, meeting frequency, and sub-committee areas 	September 2012-December 2012	PM or VP Office	MTWH, other relevant ministries
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The next six to twelve months will likely place Uganda tourism on a trajectory that will last for years to come. These ten activities are therefore critical, as their successful implementation will set in motion virtuous cycles that can propel the sector towards competitiveness and growth. Below are four key examples:

- Investment in conservation will better protect the resources tourists come to see. This will in turn increase visitation and private investments, both resulting in more funds for conservation.
- Investment in HTTI will provide the school with better facilities and better trained staff, which will allow the school to generate more money in hotel stays, events, food & beverage, and extension courses. These increased revenues will allow the school to continue investment in its facilities and staff capacity.
- An efficiently-managed tourism levy will provide the sector with funds to market the country. This will drive more visitation, with the increased numbers of hotel stays generating more money for marketing.
- Increased and better coordinated government investment, in particular for key tourism infrastructure, will help attract more visitors and private investments. This in turn will generate more tax revenue for the government and therefore more money for further investment.

When combined, the results are a more competitive industry that attracts more private investment and tourists, who spend more time and money in-country and therefore generate more local employment opportunities. The path that leads in this direction is clearly visible from the crossroads at which Uganda currently stands.

Annexes

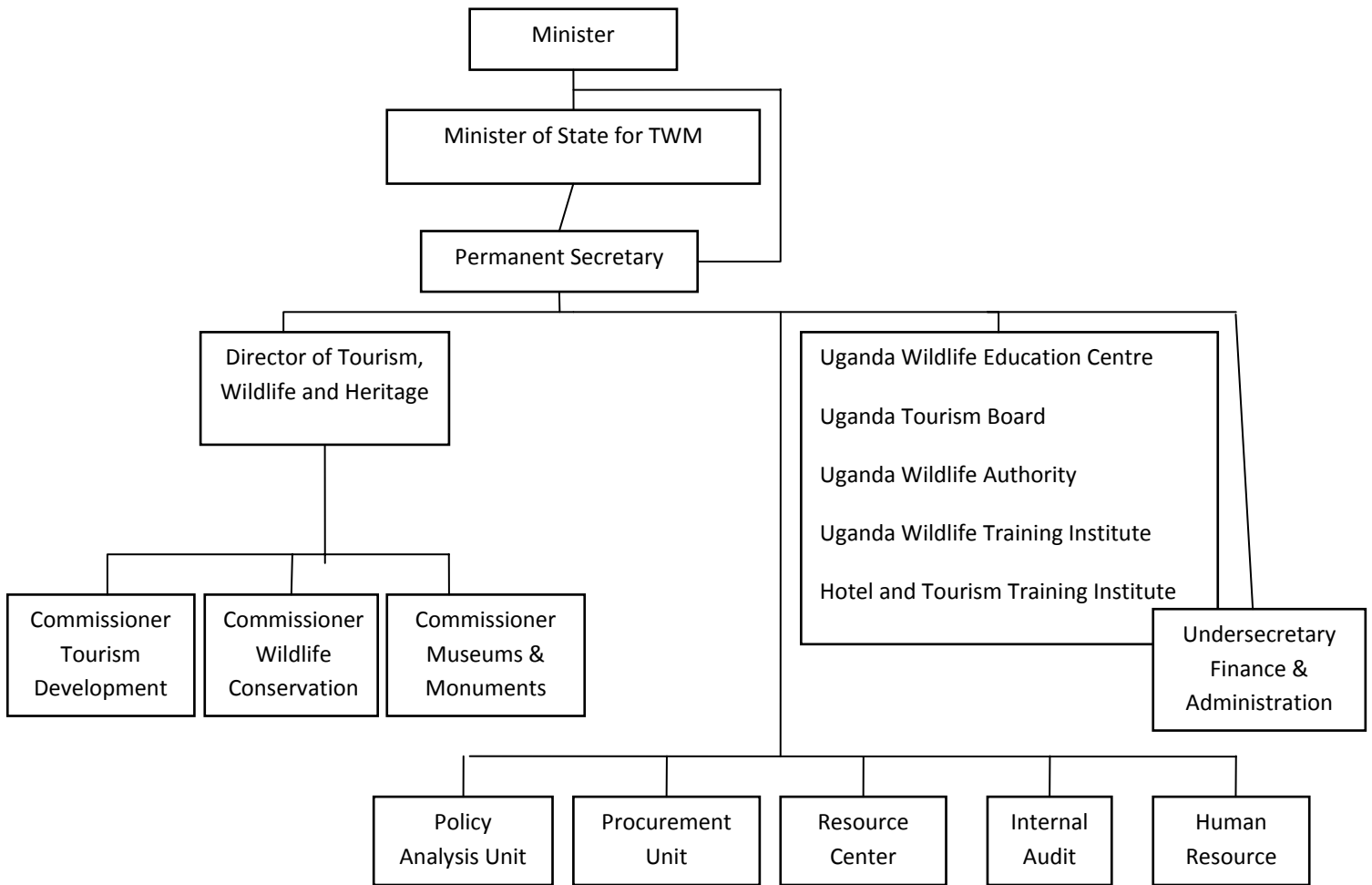
Annex 1: List of Interviewees and Collaborators

Name	Position	Organization
<i>Public Sector</i>		
Honorable Professor Ephraim Kamuntu	Minister	Ministry of Tourism, Wildlife, and Heritage (MTWH)
Ms. Egonyu Akiror	Minister of State for Tourism	MTWH
Ambassador Patrick Mugoya	Permanent Secretary	MTWH
Ms. Grace Mbabazi Aulo	Commissioner Tourism Development	MTWH
Mr. Alex Asimwe	Ag Principal Policy Analyst	MTWH
Mr. Vivian Lyazi	Principal Tourism Officer	MTWH
Ms. Jackie Nyiracyiza	Head of History and Archaeology	MTWH
Ms. Goretta Rutakamagara	Senior Economist	MTWH
Mr. Norman Isingoma	Personal Assistant to the Minister	MTWH
Mr. Baguma Cuthbert Balinda	Executive Director	Uganda Tourism Board (UTB)
Mr. Edwin Muzahura	Marketing and Public Relations Manager	UTB
Mr. Charles Tumwesigye	Chief Conservation Area Manager	Uganda Wildlife Authority (UWA)
Mr. Elly Willis Musinguzi	Director Financial Services	UWA
Mr. Raymond Engena	Concessions Manager	UWA
Mr. Peter Mbwebwe	Retail Executive	UWA
Mr. Joshua Masereka	Tourism Warden--Murchison Falls National Park	UWA
Mr. Walter Obokorwoi	Community Warden--Murchison Falls National Park	UWA
Mr. Stephen Sanyi Masaba	Acting Director Tourism and Business Services	UWA
Ms. Edith Kateme-Kasaija	Head of Trade and Production	National Planning Authority (NPA)
Mr. David Kasumba	Accountant	Uganda Wildlife Education Center (UWEC)
Dr. Chris Ndatira Mukiza	Director Macroeconomic Statistics	Uganda Bureau of Statistics
Dr. Peter Ngategize	National Coordinator	Competitiveness and Investment Climate Strategy

		(CICS) Secretariat
Ms. Lilly Ajarova	Executive Director	Chimpanzee Sanctuary & Wildlife Conservation Trust
Ms. Miriam Amori Namutosi	Acting Principal	Hotel and Tourism Training Institute
Private Sector		
Mr. Patrick Shah	Managing Director	The Far Horizon
Ms. Anne-Marie Weeden	Marketing Manager	The Far Horizon
Mr. Zahid Alam	Managing Director	Geolodges Uganda
Mr. Yusuf Mulima Mubiru	Director, Africa Operations	Volcanoes Safaris
Mr. Amos Wekesa	Managing Director Chairman	Great Lakes Safari Tours Uganda Tour Operators Association
Mr. Wim Kok	Director	Matoke Tours
Mr. Dennis Ntege	Managing Director	Adrift
Mr. Crispus Mwamidi	General Manager	Paraa Safari Lodge
Mr. Gav Lewis	General Manager	Red Chili Murchison Falls
Mr. David Kinyera	General Manager	Nile Safari Lodge
Mr. Confidence Matsiko	Tour Guide	Independent
Donors/NGOs		
Mr. Lebogang Motlana	Country Director	United Nations Development Programme (UNDP)
Mr. Wilson Kwamya	Team leader- Poverty Reduction Programme	UNDP
Mr. Nicholas Burunde	Programme Officer- Poverty Reduction Programme	UNDP
Mr. Sudi Bamulesewa	Team Leader, Environmental/Natural Resource Sub-team	United States Agency for International Development (USAID)
Mr. Kaddu Sebunya	Chief of Party	USAID-STAR (Solimar International)
Mr. Simon Jones	Vice President	Solimar International
Mr. Gideon Badagawa	Executive Director	Private Sector Foundation Uganda
Ms. Helle Biseth	First Secretary	Norwegian Embassy
Mr. Koen Sneyers	Junior Technical Assistant	Belgian Technical Cooperation
Mr. Thomas Otim	Conservation Manager	WWF Uganda
Mr. Martin Asiimwe	Project Manager—Sustainable Forest Management & Forest Certification	WWF Uganda
Community Groups		

Ms. Helen Lubowa	Executive Director	Uganda Community Tourism Association (UCOTA)
Mr. Felix Kamalha	Field Officer	UCOTA
Mr. John Kibwota	Associate	Vumbulia Agricultural Group
Ms. Edna Buyabali	Manager	Boomu Women's Group

Annex 2: MTWH Organizational Chart



Annex 3: Brief Summary of the Hotel and Tourism Training Institute (HTTI)

Location	Near Jinja town (7 acre plot)
Tourism/Hospitality Programs	<ul style="list-style-type: none"> • Tourism Management Diploma (2 years) • Tour Guiding (1 year) • Hotel Management Diploma (3 years) • Hotel Operations Certificate (1 year) • Pastry and Bakery Diploma (2 years) • Various short-courses (3 months)
Year Institute was Founded	1994 in its current location in Jinja (it took over from a school in Kampala founded in the mid 1980s)
Number of Students	450
Number of Instructors	21 (13 full-time and 8 part-time)
Status of Curriculum	Revised in 2010 but not yet approved
Strategic Plan	5-year strategic plan expired in 2011—the revision process is currently underway
Revenue Sources	35-room hotel, hotel food & beverage service, weddings and other events, laundry service
Major Challenges	<ul style="list-style-type: none"> • Limited ability to provide practical training due to old equipment (eg. laundry machines are from the '50s), lack of transport for field trips, etc • Difficulty in providing courses in areas with industry demand due to lack of qualified instructors (eg. adventure tourism, events management, transport & logistics, bird watching) • The government is sending increasing amounts of students but without sufficient increases in funding—the amount they provide for scholarship students does not fully cover associated costs. Some classes have as many as 80 students. • Many instructors lack pedagogical skills and even their technical knowledge needs to be refreshed/upgraded • Insufficient library • The structure of the 50s era building is crumbling, creating safety hazards and limiting space that can be utilized for training • Part of its mandate includes it serving as an examining body, yet it lacks the human resource capacity to do so

Annex 4: Population Estimates of Various Mammal Species in Uganda

Table 5: UWA Overall Species Population Estimates (1960s-2011)

Species	1960s	1982-1983	1995-1996	1999-2003	2004-2006	2007-2010	2011
Buffalo	60,000	25,000	18,000	17,800	30,308	21,565	21,639
Burchell's Zebra	10,000	5,500	3,200	2,800	6,062	11,814	n/a
Elephant	30,000	2,000	1,900	2,400	4,322	4,393	n/a
Rothschild's giraffe	2,500	350	250	240	259	984	n/a
Hartebeest	25,000	18,000	2,600	3,400	4,439	4,099	4,001
Hippo	26,000	13,000	4,500	5,300	7,542	6,580	n/a
Impala	12,000	19,000	6,000	3,000	4,705	33,565	n/a
Topi	15,000	6,000	600	450	1,669	845	n/a
Uganda kob	70,000	40,000	30,000	44,000	34,461	54,861	54,080
Waterbuck	10,000	8,000	3,500	6,000	6,493	12,925	13,128
Common Eland	4,500	1,500	500	450	309	1,409	n/a
Bright's gazelle	1,800	1,400	100	50	n/a	n/a	57
Roan	700	300	15	7	n/a	5	20
Oryx	2,000	200	0	0	0	0	0
Black Rhino	400	150	0	0	0	0	0
Derby's eland	300	0	0	0	0	0	0
White Rhino	300	200	0	0	0	11	11

Source: UWA (2011)

Table 6: Select Species Counts Published by Auditor General (2006-2010)⁸⁴

Species	2006	2010	% Decrease	National Park
Buffalo	1,115	591	47	LMNP
Buffalo	14,858	8,128	4	QENP
Buffalo*	2,760	2,760	0	KVNP
Buffalo	11,004	9,192	16	MFNP
Elephant	2,959	2,502	14	QENP
Hippopotamus	5,024	2,886	43	QENP
Hippopotamus	2,104	955	55	MFNP
Uganda Kob	20,971	6,543	69	QENP
Topic	1,521	657	57	QENP
Lion	43	8	81	QENP
Zebra*	95	25	74	KVNP
Ostrich*	90	19	79	KVNP
Hartebeest	4,104	3,589	12	MFNP

Source: Auditor General (2011)

Note: *Indicates figures from 2005 to 2008

Annex 5: Tourism Priority Roads

Table 7: Tourism Roads Prioritized for Upgrading

#	Road	Estimated Distance (km)	Estimated Cost per km ² Murram (USD)	Estimated Cost per km ² Tarmac (USD)	Estimated Cost of Murram (USD)	Estimated Cost of Tarmac (USD)
1	Kisoro – MGNP Gate	14	21,000	420,000	290,000	5,833,000
2	Kisoro – Nkuringo	40	21,000	420,000	830,000	16,660,000
3	Kabale – Kanungu – Buhoma	90	21,000	420,000	1,880,000	37,500,000
4	Ishasha – Katunguru	90	19,000	330,000	1,690,000	22,500,000
5	Kyenjojo – Hoima	130	19,000	330,000	2,438,000	43,330,000
6	Masindi – MFNP Gate	25	17,000	250,000	420,000	6,250,000
TOTAL		389km			7,548,000	132,073,000

Source: GSTA (2011)

Figure 6: Map of Priority Tourism Roads



Source: GSTA (2011)

Annex 6: Additional Tables

Table 8: Principal Types of Leisure Tourism in Uganda

<p>Primate Tracking: With 18 species, Uganda is undoubtedly one of the top primate destinations in the world. The largest draw is mountain gorilla tracking in BINP, which is home to around 320 of the worldwide population of 700. Chimpanzee tracking is also a major draw and can be done in KNP, QENP, MFNP, and several forest reserves.</p>
<p>Wildlife Safaris: Uganda’s NPs contain populations of 38 carnivores and 29 antelope species. The savannahs of QENP and MFNP, Uganda’s two most visited NPs, allow for top-notch safaris experiences, although there is also fine game viewing available in lesser known parks such KVNP and LMNP.</p>
<p>Adventure Tourism: Jinja is the continent’s premier adventure destination after Victoria Falls. World-class rafting is complemented with bungee jumping, jet boats, river surfing and zip lines. Other largely untapped options are hiking (RMNP, MENP, MGNP, and SNP), rock-climbing and rappelling (MENP), canoeing (Lake Bunyonyi), and horseback riding (LMNP).</p>
<p>Bird Watching: According to the Bradt guide, Uganda is “undoubtedly the finest bird watching destination in Africa”. It boasts 1,008 bird species, many which are very difficult to see elsewhere. BINP was recently named the top birding destination in Africa. Other top birding areas include SNP, BFR, QENP, KNP, and MFNP.</p>
<p>Community Tourism: The Uganda Community Tourism Association (UCOTA) has around 60 members offering products such as cultural hikes, swamp walks, cultural dances, guesthouses, campsites, and craft shops. While quality is inconsistent among members, it has been improving in recent years, as has incorporation into organized tours.</p>
<p>Cultural and Faith-Based Tourism: In addition to community tourism, there are other sites and events that showcase unique elements of Ugandan culture. By far the largest event in Uganda is the Martyr’s Day pilgrimage to Namugongo in remembrance of the Catholic, Anglican, and Muslims burned in 1886 for refusing to renounce their faith. Over a million people visit the Catholic and Anglican shrines, including several thousand foreigners. Other noteworthy sites are the new Karamoja Culture Museum, rock art in Kumi, and Kasubi Tombs—denominated as a UNESCO World Heritage Site in 2001.</p>

Table 9: Size and Growth of Primary and Second Leisure Tourism Markets: 2006-2010

Country	Arrivals 2006	Arrivals 2010	Average Annual Change (2006-2010)
Primary Leisure Tourism Markets			
United States	28,120	45,856	14%
UK	31,495	39,174	9%
Germany	5,683	8,650	13%
Secondary Leisure Tourism Markets			
Canada	6,123	8,353	11%
Holland	5,126	7,651	13%

Italy	4,075	5,505	10%
Australia	3,846	4,870	10%
Sweden	3,120	4,464	12%
France	2,956	3,893	9%
Japan	1,512	2,185	12%

Source: UBOS (2012)

Table 10: Provisional List of Concessions Being Considered by UWA

No	Facility	Location	Market	Source
QUEEN ELIZABETH NATIONAL PARK				
1	Convert the old UWA office buildings, campsite and Hostel into a 30 bed self catering accommodation facility.	Mweya	Middle / Up-Market	GMP
2	Convert the Ishasha UWA Bandas to a 16 bed tourist accommodation facilities	Ishasha	Budget / Middle	GMP
3	A 50 bed Lodge /Hotel within Ishasha sector to cater for tree climbing visitors	Ishasha	Middle / Up-market	MTWH
4	Re- develop the 54 bed Bwenda Guest House	Katwe	Middle / Up-market	MTWH
5	House boats along the Kazinga Lake George mooring	Kashaka		GMP
KYAMBURA WILDLIFE RESERVE				
1	20 bed Bandas at 40 campsites at Kashaka landing site	Kashaka	Budget / Middle	GMP
MURCHISON FALLS NATIONAL PARK				
1	Luxury Lodge in MFNP at Kibale River confluence	Kibaale	Up-Market	Serena
2	50-bed lodge within Bugungu escarpment	Bugungu	Up-Market	MTWH
	Tented camp dedicated to water rafting expeditions	Northern bank	Budget / Middle	GMP
4	Tented camp dedicated to sport fishing expeditions within the Ayago/Kibaa Area	Ayago area	Budget / Middle	GMP
5	Hot Air Balloons			Revised GMP
KIBALE NATIONAL PARK				
1	40-room lodge	Sebitole	Budget / Middle	MTWH
2	Luxury Hot Spur Eco Lodge at Sempaya	Sempaya	Budget / Middle	Management
KIDEPO VALLEY NATIONAL PARK				
1	4 to 5 star hotel; inside the national park	Not Indicated	Up-Market	MTWH

TORO SEMLIKI WILDLIFE RESERVE				
1	32-bed cottages /bandas at Nyaburogo Gorge	Nyabu- rogo	Budget	GMP
BWINDI IMPENETRABLE NATIONAL PARK				
1	A site near the gate	Near UWA Offices		MTWH
2	A hotel to replace the Ruhija Guest house	Ruhija		MTWH
LAKE MBURO CONSERVATION AREA				
1	5-star 50-bed hotel in Lake Mburo	Kigarama Hill	Up-Market	MTWH
2	Development of 48-bed Buffalo tented camp in LMNP	Rwonyo	Middle	Management
MT ELGON NATIONAL PARK				
1	40-bed Kapkwai Cottages		Up-Market	Management

Table 11: Concession Fees Collected by UWA: Range and Average per Category

Type of Concession	Annual Fixed Fee Range (USD)	Annual Fixed Fee Average (USD)	User Fee Range (USD)	User Fee Average (USD)
Accommodations	2,000-5,000	3,600	4-32 per bed-night	11
Boat Services	2,000-6,000	3,800	2.50-5 per trip	4
Trekking Services	1,000-2,000	1,500	5 per trip	5

Source: UWA (2012c)

Annex 7: Mapping of Donor Support to Tourism Sector: Current and Pipeline

Donor	Overall Project	Description of Tourism Component	Geographic Location(s)	Start and Finish Dates	Overall Project Budget
Current Projects					
USAID	Sustainable Tourism-Albertine Rift (STAR) ⁸⁵	Utilizing tourism for biodiversity conservation, with emphasis at community level. Components include enterprise development, capacity building, marketing, and some infrastructure assistance.	Albertine Rift (QENP, BNP, MGNP, and KNP)	July 2009-July 2012	Approximately US\$4 million
UNDP	Supporting Strengthening of Tourism Policy and Regulatory Environment	In collaboration with UNWTO, working on marketing strategy and tourism master plan. It will also help operationalise 2008 Tourism Act, focusing on several key regulations per year.	National	End of 2011-end of 2014	Approximately US\$ 1 million
UNDP	Support for Inclusive Markets in Tourism	Working on product development (likely to include crafts, agricultural supplies to lodges, and community tourism services), strengthening value chains, support to UTA (7 Wonders campaign and capacity building), support to UTB (business planning, promotional materials, and tourism portal).	National	November 2011-November 2014	US\$ 1.25 million
DFID	Northern Uganda Post Conflict Recovery Program (NUPCRP)	A part of NUPCRP's funds is going to PSFU Business Development Services (BUDS) Project ⁸⁶ , which provides 60% cost share for development activities. While main target is agriculture, the program is open to tourism (but only for skills development, business support services, or marketing).	55 Districts in North, including those near MFNP and KVNP	April 2011-March 2015	13 million GBP

Belgian Technical Cooperation (BTC)	Kasese District Poverty Reduction Programme	Tourism is one of many sectors being supported, based upon the district's request. Tourism interventions have been the development of a tourism map and an information center in Kasese town.	Kasese District	June 2008-June 2013	4 million Euros (roughly 30,000 UGX for tourism)
Royal Norwegian Embassy and Embassy of Sweden	Mount Elgon Regional Ecosystem Conservation Programme (MERECP) ⁸⁷	Tourism is among several income generating activities being developed. Tourism support has included development of trails and huts, as well as search and rescue training for porters. Also, an Ecotourism Master Plan for the trans-boundary area is being created.	Mount Elgon trans-boundary area (Uganda and Kenya)	September 2005-mid-2012	Approximately US\$6 million (only small portion for tourism)
NORAD	Rwenzori Mountain Conservation and Environmental Management Project	Tourism is a relatively small element of this WWF-implemented project. Specific tourism support has included: rehabilitation of trails and bridges, creation of signage, provision of camping equipment, and training courses on customer care and mountaineering.	RMNP	2005-December 2012	Approximately US\$ 2million (only small portion for tourism)
Embassy of France	Karamoja Culture Museum	The museum, opened in March 2012, was constructed through French donations. It features exhibits on local rock art, paleontological findings, and ethnography of the Karamoja people.	Moroto	2010-2012	Approximately 40 million UGX
US Embassy	Protection and Preservation of Rock Art in Eastern Uganda	A portion of the project funding has gone to creating trails and signage so the area can be accessible to tourists.	Kumi	October 2010-May 2012?	US\$ 37,000
UNESCO	Reconstruction of Kasubi Tombs	Having procured funds through the Japanese government, they will be helping primarily with a risk management strategy and fire-fighting equipment.	Kampala	Should start by May 2012	US\$500,000

Projects in the Pipeline					
USAID	Tourism for Biodiversity and Economic Growth	Largely a continuation and scaling-up of STAR. Destination focus is largely shifting away from Albertine Rift. It also includes capacity building activities with UWA and NFA.	National but with focus on KVNP, LMNP, MFNP, BFR, and KFR	June 2012-June 2016	US \$10 million
USAID	GDA Matching Grants Scheme	Provides 1:1 matching grants primarily to agricultural and private sector development, but with some money earmarked for biodiversity conservation (including tourism)	National	3-year initiative to start soon (now seeking proposals)	US\$17 million (US\$3 million earmarked for biodiversity)
Enhanced Integrated Framework (EIF)	Support to the Hotel and Tourism Training Institute (HTTI)	The project, still to be funded, would send instructors abroad for further education, construct 10 new demonstration bed rooms, create best practice manuals, and conduct some industry training courses.	Jinja	Three years	US\$ 3 million (including roughly US\$150,000 from MTWH)
USAID	Support to UWA and or NFA, either directly or through the US Forest Service (under consideration)	This project, if approved, would provide funding to help primarily with infrastructure costs. Consideration was delayed until a Board of Directors was put in place at UWA.	National but with possible focus on oil areas	TBD	TBD
Norwegian Embassy	Direct support to UWA	This project is being considered, but was waiting for appointment of a UWA Board and is still subject to approval of GMPs for QENP and MFNP. A likely element would be facilitating diversification of tourism in light of constraints created by oil exploration.	MFNP, QENP, others?	TBD	TBD

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- ¹ “Total contribution” includes not only direct expenditures, but also indirect and induced expenditures
- ² WTTC (2012) *Travel & Tourism Economic Impact 2012: Uganda*, WTTC, London.
- ³ Ibid
- ⁴ Uganda Bureau of Statistics (2011) *2011 Sector Statistical Abstract*, Ministry of Tourism, Trade, and Industry, Kampala
- ⁵ Tentena, P. (2012) “Uganda Starts tourism Police”, *East African Business Week*, 3/4/12, Kampala.
http://www.busiweek.com/index.php?option=com_content&view=article&id=2495:uganda-starts-tourism-police&catid=100:general-&Itemid=1389
- ⁶ The World Bank (2011b) *Uganda, Migration and Remittances Factbook 2011*,
<http://www.remittancesgateway.org/index.php/factbook>
- ⁷ Ibid
- ⁸ The Republic of Uganda (2011) *Approved Estimates of Revenue and Expenditures FY 2011/12*, Ministry of Finance, Planning, and Economic Development, Kampala.
- ⁹ The figure of \$4.5 million is based on a budget of 10.8 billion UGX converted into dollars at the May 21, 2012 exchange rate of 2,421 UGX per dollar.
- ¹⁰ The Republic of Uganda (2010) *National Development Plan (2010/11-2014/15)*, Kampala.
- ¹¹ Lonely Planet (2011) *Lonely Planet’s Best In Travel: Top 10 Countries for 2012*
<http://www.lonelyplanet.com/europe/travel-tips-and-articles/76856>
- ¹² Invisible Children (2012) *Kony 2012* <http://www.youtube.com/watch?v=Y4MnpzG5Sqc>
- ¹³ Associations with oil exploration, replete with drilling rigs and gas flares, are entirely incompatible with the images of pristine, wildlife-rich protected areas that Uganda is marketing.
- ¹⁴ While it is inevitable that countries within the same regional compete for tourists, the gain of one country does not necessarily imply loss for another. As countries within a region improve their tourism offer, the overall number of visitors to the region will inevitably increase.
- ¹⁵ Chemonics International (2006) *Building Uganda’s Global Competitiveness in Tourism: Uganda’s Travel and Tourism Plan 2005-2015*, Report produced for USAID under the Uganda Strengthening the Competitiveness of Private Enterprise (SCOPE) Project, October 2006.
- ¹⁶ Uganda Export Promotion Board (2006) *Uganda Ecotourism Assessment*, Report commissioned by UNCTAD and MTTI, February 2006
- ¹⁷ World Trade Organization (2006) *Uganda Diagnostic Trade Integration Study*, May 2006
- ¹⁸ International Trade Center (2011) *Opportunity Study: Uganda Inclusive Tourism Programme*, October 2011
- ¹⁹ Such figures are often subject to some collection errors.
- ²⁰ World Bank (2012) *Sub-Saharan Africa Tourism Database*: <http://wbafricatourism.pointinspace.com>
- ²¹ Uganda Bureau of Statistics (2011) *2011 Sector Statistical Abstract*, Ministry of Tourism, Trade, and Industry, Kampala
- ²² Ibid
- ²³ Figure 2 uses data from 2009, as not all countries have reported leisure tourism statistics for 2010. Available data from 2010 indicates that leisure tourism arrivals increased from 50,000 to 68,000 in Rwanda, from 593,000 to 609,000 in Tanzania, and from 126,000 to 149,000 in Uganda.
- ²⁴ Uganda Bureau of Statistics (2011) *2011 Statistical Abstract*, Kampala
- ²⁵ Rwanda registered international leisure tourism arrivals of 21,000 in 2007, 59,000 in 2008, 50,000 in 2009, and 68,000 in 2010.
- ²⁶ World Bank (2012) *Africa Statistics Database*, Washington, D.C.
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- ³⁰ International Trade Center (2011) *Opportunity Study: Uganda Inclusive Tourism Programme*, October 2011
- ³¹ Uganda Bureau of Statistics (2011) *2011 Statistical Abstract*, Kampala

³² Direct contribution to employment includes jobs in hotels, travel agencies, airlines, other passenger transportation services, restaurants, and other leisure businesses. The total contribution to employment includes wider effects from investment, the supply chain, and induced income impacts.

³³ WTTC (2012) *Travel & Tourism Economic Impact 2012: Uganda*, WTTC, London.

³⁴ According to WTTC, the corresponding figures for Rwanda are a 56.9% increase in direct employment and a 56.2% increase in total employment, although from a small baseline of 34,300 and 130,300 direct and total jobs.

³⁵ Uganda Bureau of Statistics (2011) *2011 Sector Statistical Abstract*, Ministry of Tourism, Trade, and Industry, Kampala

³⁶ “Foreign non-residents” are international tourists not living in Uganda, as opposed to “foreign residents”, who are expatriates living in Uganda.

³⁷ World Trade Organization (2006) *Uganda Diagnostic Trade Integration Study*, May 2006

³⁸ WEF (2011) *Travel & Tourism Competitiveness Index Country Profiles: Uganda*, WEF, Geneva.

³⁹ Exit surveys can generate highly valuable tourist information such as average length of stay, expenditures (total and by category), destinations visited, satisfaction levels, perceived areas of improvement, etc.

⁴⁰ *ibid*

⁴¹ The “Uganda Tourism/Hospitality Training Institutions Assessment” study produced by the USAID STAR program in January 2010 reveals the presence of a number of Ugandan training institutions, which are primarily concentrated in the Kampala/Entebbe area and the Albertine Rift. The non-exhaustive study, combined with follow-up research, has yielded information on four private vocational colleges with tourism and or hospitality degrees in Kampala/Entebbe. The corresponding figure for the Albertine Rift is 11—mostly based in Fort Portal, Kasese, and Kabale. There are also four universities offering tourism and or hospitality degrees in Kampala—most prominent among them being Makerere University—and two in the Albertine Rift.

⁴² This represents less than 4% of the overall tourism budget within MTTI (10.8 billion UGX).

⁴³ This assertion came from several stakeholders interviewed, including Kenyan Hotel General Manager Crispus Mwamidi.

⁴⁴ Uganda Bureau of Statistics (2011) *2011 Statistical Abstract*, Kampala

⁴⁵ World Trade Organization (2006) *Uganda Diagnostic Trade Integration Study*, May 2006

⁴⁶ Office of the Auditor General (2011) *Value for Money Audit Report on the Management of Wildlife by the Uganda Wildlife Authority*, Kampala.

⁴⁷ These were principally from park entrance fees and concessions

⁴⁸ Preliminary figures from 2010/2011 reveal an even more impressive percentage of over 90% (revenues of 26.8 billion shillings with total expenditures of 28.6 billion shillings).

⁴⁹ Similarly low capital expenditure figures were seen in 2010/2011.

⁵⁰ It is also worth noting that UWEC also has some significant needs in terms of infrastructure and equipment. Some of the exhibits have grown old and are in need of repair, there is a need for a mobile wildlife rescue van, and the center lacks critical equipment in the National Animal Hospital and Quarantine such as a blood analyzer, incubator, centrifuge, and anesthetic machine.

⁵¹ UCOTA, a membership-based NGO, was established to empower poor communities to improve their lives through small scale tourism and handcraft enterprises. Its principal activities are training, marketing, networking, and advocacy. Its membership base currently consists of 44 groups across the country, with a total of 2901 individual members.

⁵² Uganda Community Tourism Association (2012) *UCOTA Membership List*, February 2012, Kampala.

⁵³ The most common cases of human-wildlife conflict are caused by problem animals that raid crops or killing livestock.

⁵⁴ A draft law, yet to be passed, contains provisions by which oil exploration concession-holders would be required to offset any losses suffered to wildlife and the tourism sector.

⁵⁵ The Republic of Uganda (2008) *Uganda Tourism Act, 2008*, Kampala.

⁵⁶ WEF (2011) *Travel & Tourism Competitiveness Index Country Profiles: Uganda*, WEF, Geneva.

⁵⁷ WEF (2011) *Travel & Tourism Competitiveness Index Country Profiles: Rwanda*, WEF, Geneva.

⁵⁸ WEF (2011) *Travel & Tourism Competitiveness Index Country Profiles: Kenya*, WEF, Geneva.

⁵⁹ WEF (2011) *Travel & Tourism Competitiveness Index Country Profiles: Tanzania*, WEF, Geneva.

⁶⁰ The Kony 2012 video was released on March 5, 2012 by the US-based NGO Invisible Children. The 30-minute video is the centerpiece of the “Stop Kony Movement” which aims to have the warlord arrested by December 2012. Within a month of its release, the video had been viewed over 100 million times on websites YouTube and Vimeo. Yet the reach of the video has extended far beyond the online realm, as it has gained extensive coverage on major broadcast and print media outlets—including the cover of Time Magazine. The video has been received with a mix of praise and criticism. Some of the criticism has focused on the over-simplification and distortion of some of the conflict’s complexities. A number of prominent Ugandans feel that the video does not make it clear that Kony left Uganda six years ago and therefore no longer represents a security threat to the country. Within the context of tourism promotion, this point is critical. Certainly the video will reactivate associations of Uganda with violence and insecurity in the minds of many. Furthermore, such associations will for the first time be implanted in the minds of the next generation of potential visitors.

⁶¹ Uganda Tourism Board (2011) *Tourism Uganda: Marketing Strategy 2011-2016*, April 2011.

⁶² Presidential Initiative for Sustainable Tourism in Uganda (PRESTO) website (2012), www.presuto.org

⁶³ The new UWA Board of Trustees was appointed on March 27, 2012 after being vacant for roughly a year and a half.

⁶⁴ Roughly 260 guides have been certified by USAGA. Budgets for the MTWH program only permitted certification of 60 of the USAGA guides, however MTWH will offer certification courses to additional guides in FY2012/2013.

⁶⁵ African Development Bank (2011) *Preliminary Market Segment Analysis of the Tourism Sector in Botswana*, April 2011.

⁶⁶ International Trade Center (2011) *Opportunity Study: Uganda Inclusive Tourism Programme*, October 2011

⁶⁷ WEF (2011) *Travel & Tourism Competitiveness Index Country Profiles: Uganda*, WEF, Geneva.

⁶⁸ Uganda Bureau of Statistics (2011) *2011 Sector Statistical Abstract*, Ministry of Tourism, Trade, and Industry, Kampala

⁶⁹ The \$2,191,000 figure was obtained by multiplying the 4,382 unsold permits reported by UBOS for 2010 by the \$500 gorilla permit fee.

⁷⁰ WEF (2011) *Travel & Tourism Competitiveness Index Country Profiles: Uganda*, WEF, Geneva.

⁷¹ Global Sustainable Tourism Alliance (2011) *Uganda/Sustainable Tourism in the Albertine Rift (USAID-STAR) Final Report: July 2009-August 2011*, Report delivered to USAID, August 2011

⁷² UTA’s ten sector association members are the Association of Uganda Tour Operators (AUTO), Uganda Hotels Owners Association (UHOA), Uganda Safari Guides Association (USAGA), Uganda Community Tourism Association (UCOTA), Board of Airlines Representatives (BAR), District Tourism Associations (DTAs), Hotel and Catering Association of Uganda (HCAU), Uganda Association of Travel Agents (TUGATA), Uganda Association of Air Operators (UAAO), and Uganda Association of Tourism Training Institutions (UATTI).

⁷³ International Trade Center (2011) *Opportunity Study: Uganda Inclusive Tourism Programme*, October 2011

⁷⁴ The following recommendations are divided into three categories. First are “immediate-term”, which are the most urgent. Ideally, the recommendations should be acted upon as soon as possible and completed within the next six months. “Short-term” recommendations should also be attended to urgently and completed within six months to one year. “Medium to long-term” are those that could take several years to fully implement.

⁷⁵ This data can be obtained through a combination of primary data collection; free information services provided by sources such as UNWTO, WTTC, WEF; and paid services such as Mintel and Euromonitor.

⁷⁶ This would require consent from the Ugandan government since extra costs impact the profits that will be shared between it and the oil companies.

⁷⁷ The first issue for discussion should be whether the two taxes should be collect simultaneously or combined—most stakeholders believe the latter is most feasible. Next the overall amount to be taxed should be determined and assuming a combined tax, how the funds will be divided between UTB and the district. Also critical is how the districts will use the funds. As it is a tax on tourism, the funds should go towards tourism-enhancing activities such as product development, infrastructure, town beautification, service provider training, or even funding a district-level tourism coordinator position. The assumption is that money going to UTB will be used primarily on marketing, although some portion could be used on training programs as well.

⁷⁸ Uganda Bureau of Statistics (2011) *2011 Statistical Abstract*, Kampala

⁷⁹ Ministry of Tourism, Wildlife, and Heritage (2012), *Repositioning the Tourism Sector: For Accelerated Transformation of Ugandan Society*, Unpublished report, Kampala.

⁸⁰ Kenya Tourism Board Website (2012) *Contact Us*

http://www.magicalkenya.com/index.php?option=com_content&task=blogcategory&id=102&Itemid=205

⁸¹ Nielsen, H. and Spencely, A. (2010) *The Success of Tourism in Rwanda-Gorillas and More*, Background paper for Africa Success Stories Study produced by the World Bank and SNV, April 2010

⁸² Global Sustainable Tourism Alliance (2011) *Uganda/Sustainable Tourism in the Albertine Rift (USAID-STAR) Final Report: July 2009-August 2011*, Report delivered to USAID, August 2011

⁸³ Ministry of Tourism, Wildlife, and Heritage (2012), *Repositioning the Tourism Sector: For Accelerated Transformation of Ugandan Society*, Unpublished report, Kampala.

⁸⁴ These figures have been contested by several authorities and furthermore represent a relatively small selection of all species found across the range of UWA's national parks.

⁸⁵ Global Sustainable Tourism Alliance (2011) *Uganda/Sustainable Tourism in the Albertine Rift (USAID-STAR) Final Report: July 2009-August 2011*, Report delivered to USAID, August 2011

⁸⁶ Private Sector Foundation Uganda (2011) *Business Uganda Development Scheme (BUDS) Fact Sheet*, Kampala.

⁸⁷ NORAD (2008), *Midterm Review of Mount Elgon Regional Ecosystem Conservation Programme (MERECP)*, Oslo.