



**MINISTRY OF TOURISM, WILDLIFE AND ANTIQUITIES**

# **ANNUAL TOURISM SECTOR PERFORMANCE REPORT FINANCIAL YEAR 2018/19**



**“Tourism as a dynamic driver for socio-economic transformation”**



MINISTRY OF TOURISM, WILDLIFE AND  
ANTIQUITIES

ANNUAL TOURISM SECTOR  
PERFORMANCE REPORT FY 2018/19

SEPTEMBER, 2019

## MESSAGE FROM THE MINISTER

I am delighted to present to the public this Annual Tourism Sector Performance Report for the Financial Year 2018/19. This is an important instrument of accountability on how the Ministry is delivering on its mandate and the overall NDPII development objective.

Consequently, the report highlights both the financial and physical performance of the sector during the financial year including the revenues generated by sector departments and agencies. It also highlights the achievements at output, outcome and impact levels in areas of tourism regulation, governance, promotion and marketing, tourism infrastructure, products and skills development as well as wildlife and cultural heritage conservation.

The sector has continued to register significant and progressive improvements as shown by several development indicators such as tourist arrivals, foreign exchange earnings, growth in domestic tourism, employment and tourism business among others. For example in 2018, Uganda's tourist arrivals grew by 7.4 percent from 1.402 million in 2017 to 1.505 million. The foreign exchange earnings also grew by 10.1 percent from US\$ 1.45 billion in 2017 to US\$ 1.6 billion. A total of 667,600 people were employed in the Travel and Tourism industry in 2018.

This visible success is attributed to the combined efforts by various stakeholders including the Ministry, its agencies, the Private Sector, Civil Society Organizations, Development Partners, and NRM Government that has provided security and safety for the sector to flourish. Communities surrounding tourist sites cannot be thanked enough as they continue to support the protection of our tourism and heritage resources.

Our current and future initiatives will focus on the inclusive conservation of our heritage and unlocking Uganda's tourism potential to create sustainable jobs, improve the livelihoods of our people and to contribute to the growth of our economy.

Great strides have been made in the strategic areas especially, aggressive marketing and promotion, product diversification and hospitality skills development along the tourism value chain. Similar efforts in natural and cultural heritage conservation, policies and regulation development, security and safety have been made. The Uganda Airlines is the latest addition to the efforts of improving connectivity and promotion of the Pearl of Africa. There is more to be done and will be done if we address the most binding constraint of inadequate funding.

Government has prioritized the sector in all the national planning frameworks and committed to using it as a dynamic driver for socio-economic transformation. Tourism is now recognized as a key pillar and a primary growth sector for the economy.

Finally, I wish to express my gratitude to all those who have contributed to the production of this report in particular to all the institutions, both private and public, that supplied data, valuable feedback and analysis.



Prof. Ephraim Kamuntu (MP)  
**MINISTER**

## MESSAGE FROM THE PERMANENT SECRETARY

Globally, tourism continues to grow as a powerful socio-economic industry with the total international tourist arrivals reaching 1.4 billion and foreign exchange earnings USD 1.451 trillion in 2018. Both the emerging and advanced economies have benefited from the rising tourism incomes except that Africa has benefitted the least as it had only 67 million arrivals – translating into 5% of global tourist arrivals.

Despite the low position in the global tourism market, Uganda's Tourism Sector continues to power ahead, generating Ushs 8.36 trillion in spend in 2018 which translates to 7.7 percent of the country's GDP. This marks another year of expenditure growth where the visitors spent almost Ushs 1.4 trillion more than in 2017. Growth in 2018 was driven by international tourism arrivals which increased by 7.4 percent and with domestic tourism spending increasing significantly.

A number of underlying drivers are ensuring that tourism deservedly retains its status as the number one foreign exchange earner for this country. Notably is the great effort and commitment by the Tourism sector MDAs and other actors - both government and non-government, in and outside the tourism sector.

However, while international visitors are increasing, enticing them to stay longer and even make repeated visits is still a challenge for the industry, as the average length of stay has stagnated at 7 days. Our industry is operating in an increasingly competitive regional and global environment.

Maintaining a strong growth trajectory while delivering a memorable experience for visitors requires the industry to continue diversifying, expanding and marketing its offerings to match changing visitor expectations as well as those of visitors from the new source markets. The tourism workforce of the future will also need to evolve in order to meet these expectations through embracing new technologies that lift productivity, while facilitating and enhancing the visitor experience.

Continued investment in infrastructure and attractions in environmentally responsible ways is critical in expanding accessibility, spreading the tourism earnings along the value and improving visitor attractions and experiences.

This Ministry and the Sector Agencies will continue to collaborate and work with the private sector and all other players, to fast-track the implementation of interventions that promote tourism, wildlife and cultural heritage conservation for socio-economic development and transformation of the country.



Doreen S. Katusiime (Mrs)  
**PERMANENT SECRETARY**

## EXECUTIVE SUMMARY

### *Introduction*

This Annual Tourism Sector Performance Report FY2018/19 provides highlights on the performance of the various segments that constitute the tourism sector performance including the financial and physical performance. The report focuses on an assessment of progress against the Sector's commitments made against the approved Ministerial Policy Statement for the financial year as well as the Budget Speech for 2018/19. It also tracks progress against actions agreed upon in the 9<sup>th</sup> Tourism Sector Review Conference held in November 2018. The Report serves to provide timely and focused information to the decision makers and other stakeholders on the performance of the sector during the Financial Year 2018/19 vis a vis the previous years. It also highlights what has been delivered at output, outcome and impact levels in areas of Tourism development, Wildlife and Cultural heritage conservation. It provides accountability for the spending of the sector budget, and outlines key areas of performance and under-performance. Fundamentally, the Report is designed and timed to guide decision makers on where emphasis and resources need to be placed in the coming financial year and the medium term. It is especially timely at this critical moment when the Government is undertaking the preparation of the 3<sup>rd</sup> National Development Plan and therefore identifying the priorities that will be implemented over the period FY 2020/21-2024/25.

### *Global Outlook of the Tourism Industry*

In 2018, the number of international tourist arrivals worldwide reached 1.4 billion, two years before it was predicted to do so in 2020. The year 2018 also marked the seventh year in a row where the growth in tourism exports (+4 percent) exceeded the growth in merchandise exports (+3 percent).

The sector accounted for 10.4 percent of global GDP and 319 million jobs, or 10 percent of total employment in 2018. Given this rapid pace of growth, the international arrivals are predicted to reach 1.8 billion by 2030, accompanied by massive increase in Tourism Jobs and Revenues.

### *Contribution of Tourism to Uganda's economy increases significantly*

The Sector registered an improved performance in 2018 compared to 2017. The number of international visitor arrivals increased by 7.4 percent from 1,402,409 in 2017 to 1,505,669 in 2018. The improved performance is attributed to increased marketing efforts (both domestic and abroad), increased participation and understanding of Tourism and its role in the economy, Increased investment in Tourism enterprises, stable political environment and improved conservation efforts that have stimulated the increases in the stock of Uganda's wildlife.

In 2018, the sector generated US\$ 1.6 billion in forex earnings compared to US\$ 1.45 billion in 2017. The sector accounted for 7.7 percent of the national GDP and 667,600 jobs which is about 6.7 percent of total national employment.

The hotel room and bed occupancy rates stood at 51 percent and 44 percent respectively in 2018. Visitors to national parks increased by 14 percent to 325,345 visitors in 2018. Visitors

to the selected tourist sites (UWEC, National Museum and the Source of the Nile) rose by 19 percent to reach 581,616 visitors.

### ***Financing of the sector over the NDP II period***

Since FY 2015/16, the Tourism sector financing has visibly increased as evidenced from the approved budget increasing from Ush 91 billion in FY 2015/16 to Ushs 118 billion in FY 2018/19. Most of the increase arose from the internally generated revenue by sector Agencies in form of Appropriation in Aid which contributed 72 percent of total sector budget in FY 2018/19.

While only Ushs 85 billion was the revenue projected to be generated from the various activities during the financial year, the actual collections were way above this target. The good performance was due to a number of factors including; improvements in gorilla sales where about 74 percent of the gorilla tracking permits were sold, increased visitation to national parks which registered 14 percent increase in total visitors and category of foreign non-residents increased by 22.5 percent in FY 2018/19, and improvement of infrastructure and facilities in protected areas.

Given that over 70 percent of the Sector's budget is funded from internally generated revenues, it is critical that revenue generation continues to be a key objective for all Sector MDAs to achieve a more sustainable funding for interventions that promote tourism, wildlife and cultural heritage conservation for socio-economic development and transformation of the country.

While it is recognized as critical, the Tourism Sector remains largely underfunded. Out of the approved National budget of Ushs 32.7 Trillion for the FY 2018/19, only Ushs. 118 billion (0.36%) of the total resource envelope was allocated to the Tourism Sector. Out of the Ushs 118 billion approved for the sector, Ushs 85 billion was to be internally generated leaving only Ushs 33 billion as sector funding from the Consolidated Fund.

Although there are improvements in Uganda's Tourism sector financing, both from the Consolidated Fund and the internally generated revenues, there are still unfunded priorities with a funding up of Ushs 100 billion annually. There is therefore need to enhance the Sector budget to ensure the development of tourism products, skills development, tourism promotion and marketing, among others.

### ***Tourism support infrastructure and product development***

Delivering a memorable experience for visitors requires the industry to continue diversifying and expanding the tourism product range and tourism support infrastructure to match visitor expectations which keep on changing from time to time and are unique. During the financial year, the Sector MDAs continued to improve various tourism products and facilities with focus on trails and visitor facilities in protected areas including Semuliki National park (NP), Mt. Rwenzori NP, L. Mburo NP, Murchison Falls NP, Kidepo Valley NP. Some repairs were done on the Uganda Museum, Mugaba Palace, to protect the integrity of the site boundary, and going forward, focus will be on renovating the other structures such as the main former King's house and landscaping of the entire area to make it a competitive tourist site as well as enhance cultural heritage conservation. For the Source of the Nile, a 20 –year Master plan was developed to guide investments in the development of this unique site. Additionally, a tourism

investment project proposal was developed for the Equator along 6 points i.e. L. Victoria Island, Kayabwe, Kikorongo, Kiruhura, Ssembabule and Kamwenge.

Continued investment in facilities, infrastructure and attractions will be critical in expanding accessibility, inclusiveness, spreading the tourism earnings along the value chain and improving visitor attractions and experiences.

However, while several tourism products and sites have been identified in various locations in the country, these products, facilities and support infrastructure remain under/undeveloped because of limited resources. In FY 2018/19, the Sector MDAs received Ushs 5.47 billion only, and could not meet the intensive product development, capital needs. For instance, the basic development of the Mt. Rwenzori Infrastructure (excluding the cost of the cable car and ancillary facilities which is estimated at US\$ 40 million) requires Ushs 70 billion. There is therefore need for more financial resources for the development of tourism products in this country.

### ***Tourism roads get increased attention***

Tangible progress has been made in the development of Tourism roads in Uganda. A total of 8 roads out of 65 mapped out in 2012 have been completed with total length of 765 kms. An additional 15 roads are under construction with a total length of about 900kms. In order to fast-track their development, Government has committed to working on at least 200kms of tourism roads annually and Ushs 57 billion was specifically committed to work on additional kms in the Budget for FY 2019/20. Owing to the slow rate of development of these roads mainly due to limited resources, other modes of financing such as contractor facilitated financing are being explored by Government.

### ***Policies, regulations and governance***

During the financial year, the Uganda Wildlife Bill 2017 was enacted by Parliament and consultations on the review of the Tourism Act, 2008 was initiated. The Principles for the Museums and Monuments Bill were approved by Cabinet and the Bill is under drafting by 1<sup>st</sup> Parliamentary Counsel. Once enacted, the new Bill will repeal the Historical Monuments Act 1967.

The Domestication Orders for CITES (Convention on International Trade in Endangered Species of wild fauna and flora) are at Parliament level.

The expenditure and motivation survey was conducted to generate vital tourism information about the performance of Uganda's Tourism Industry. In an effort to improve and ensure availability of timely statistics on tourist arrivals to the country, various steps have been taken to have tourist data capture decentralized at the point of arrival such as Entebbe International Airport and other Border posts. This decentralization of immigration data capture will start soon to enable dissemination of tourist arrivals data on a monthly basis with improved levels of accuracy.

The general Management plans were developed for various wildlife protected areas and closer monitoring of oil, gas and hydropower related activities in wildlife habitats has been done to ensure achievement of the highest levels of compliance.

## ***Tourism Promotion and Marketing***

During the FY 2018/19, the country's tourism and investment potential was marketed and promoted at 18 expos and 3 international events to enhance destination visibility and Tourism Trade Agreements.

A total of four domestic tourism promotion drives (Tulambule campaigns) and 22 Domestic events were supported and leveraged to promote domestic tourism and the country's tourism products. These included 4 faith based events, 3 sports events, 4 regional culture and heritage events, 2 MICE events, 1 culinary event, 3 historical/national events, 2 avian tourism promotion activations, 1 tourism awareness campaign and 2 wildlife tourism promotion events. The events were key pullers of multitudes - for example the World Tourism Day celebrations that were held in Jinja attracted over 5,000 participants including students, pupils and communities, Uganda Martyrs day celebrations attracted over 3.7 million participants. These activities were used as a vehicle to popularize tourism sites, promote wildlife and cultural heritage conservation and to encourage Ugandans to visit and experience the beauty of their own Country and resources.

A total of six Market Destination Representation (MDR) firms were contracted and deployed to undertake destination representation of Uganda in the tourist source markets. They include P.H.G for USA and Canada; Kamageo for UK and Ireland; KPRN for German speaking Countries (Austria, Germany and Switzerland); P.H.G for China; Aviareps for Japan, and the Gulf States (Bahrain, Iraq, Kuwait, UAE, Saudi Arabia, Qatar and Oman).

Other key tourism promotion actions included 12 familiarization trips undertaken to improve destination publicity, awareness and product knowledge; several industry stakeholder educational and networking engagements on MICE (Meetings, Incentives, Conferences and Events) in an effort to enhance the promotion of MICE industry in Uganda; production and dissemination of 169,000 promotional materials, training of 50 media officials in patriotic journalism and responsible media/crisis reporting, as well as the dissemination of Tourism information on several media platforms such as billboards and LED boards in various districts across Uganda.

## ***Conservation and sustainable utilization of wildlife resources***

The conservation and responsible utilization of Uganda's wildlife resources is critical, even to the entire tour and travel industry. Currently, over 50 percent of Uganda's tourism can be traced back to the vast pool of Uganda's wildlife resources. The sector though UWA is responsible for Uganda's Wildlife Protected Areas including 10 National Parks and 12 Wildlife Reserves.

During the financial year, efforts were put on Protected Area boundary management, addressing Human Wildlife Conflicts, Management of Wildlife Outside protected areas, Conservation awareness and education, Protected Area Assessment, Wildlife censuses and surveys, Wildlife Health Monitoring and Research; as well as Rescue, rehabilitation and diversification of wildlife at UWEC.

While there are increased efforts and funding towards wildlife heritage conservation, the sector is experiencing increasing pressure from the expanding human populations, illegal activities

such as poaching or killing outside park boundaries, climate change, as well as habitat destruction.

### ***Cultural heritage conservation***

The National Museum, regional museums and other selected heritage sites were maintained through proper presentation and upgrading of museums galleries, re-demarcation of boundaries, maintaining of archeological trenches and general conservation and curation of artifacts.

To control encroachment on the cultural heritage sites, community awareness meetings were held in the different parts of the country that resulted into the process of acquiring land titles such as Dolwe Island and its associated 35 rock art site (paintings and Engravings).

Survey, documentation, research and collection to improve and empower the Museums and Monuments Data base was conducted in Mayuge district, Napak and Moroto (Karamoja region) and Northern Uganda in the areas of Agaro, Patiko and Lamoji. As a result a paper on some of the collected specimen has been published which can also be accessed on the MTWA website under geo-pal Uganda Journal. The survey and documentation exercise revealed more site that need to be protected.

In an effort to enhance cultural heritage conservation awareness, the International Museums day was celebrated in Kampala, which had participation from schools, Government Agencies as well all community members. Additionally, several schools School educational outreaches were conducted in four schools in Soroti, Kotido and Moroto to create awareness about cultural heritage in Uganda for posterity.

### ***Skills development and quality assurance of tourism service standards***

In FY 2018/19, a total of 278 new students were enrolled at UHTTI (Uganda Hotel and Tourism Training Instituted –Jinja) on both Diploma and Certificate courses. These included 173 female and 105 male. For UWRTI (Uganda Wildlife Research and Training Institute), a total of 100 new students were enrolled.

Several students graduated during the financial year with 201 graduating at UHTTI while 78 at UWRTI on both Diploma and Certificate courses.

In line with the medium term plans of upgrading UHTTI and UWRTI to training centres of excellence, the construction of the training application hotel at UHTTI is underway and the phase 1 is expected to be completed by December 2019. For UWRTI, the feasibility studies are underway for the rehabilitation and expansion of the institute infrastructure.

Under Quality Assurance of standards in the tourism sector, 1,613 tourism service providers/stakeholders along the value chain were equipped with skills in minimum quality service and industry standards, standards enforcement, product knowledge.

The E-Registration and Licensing System was developed and operationalized to facilitate the online registration and licensing of tourism enterprises. During the financial year, a total of 56 Tour and Travel companies were licensed while 2,066 accommodation facilities were registered and inspected. This was in addition to the over 300 tour companies, operators and guides that were registered.

## *Progress on implementation of recommendations from 9<sup>th</sup> Sector Review*

During the 9<sup>th</sup> Tourism Sector review, a total of thirty five recommendations were made, spanning the broad priority areas of Tourism marketing and promotion, skills development and infrastructure and natural and cultural heritage conservation. The issues raised during the review included Limited promotion of Uganda's tourist attractions, Limited level of tourism skills throughout the value chain - managerial, technical, and operational and in key supporting functions both in government and private sector, Weak legal framework and infrastructure of the cultural heritage, Transnational illegal wildlife trade and trafficking, among others. There have been tremendous efforts to implement the recommended actions with 12 recommendations already completed, 18 currently being implemented and the rest of the recommendations planned for the medium term.

## *Sector Plans for the Financial Year 2019/20*

A total budget of Ushs 193.7 billion was approved for MTWA and its Agencies to implement the work plans during the FY 2019/20. Out of this, Ushs 152 billion will be internally generated by the Sector MDAs while Ushs 41 billion (21 percent) will be funded from the Uganda Consolidated Fund.

At outcome level, the Sector will continue to focus on improved wildlife and Heritage Conservation and Tourism Growth, targeting to achieve Ushs 8.84 trillion in contribution of the sector to GDP, realize 1.74 million visitor arrivals to the country and attain at least 10 percent increase in tourists from the key source markets.

The Planned Outputs for the Sector, for the FY 2019/20 were carefully selected to achieve sector objectives under the key results areas of Policies, regulations and governance; Conservation and Sustainable Utilization of Wildlife Resources; Cultural Heritage Conservation; Tourism Promotion and Marketing; Tourism Infrastructure and Product Development; as well as Capacity Building, Tourist Service Standards and Quality Assurance.

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## KEY CONCEPTS AND DEFINITIONS

### **Tourism**

‘Tourism’ is a term that is understood in tourism economics to describe the movement and economic activity of people for every purpose other than their regular employment and normal day-to-day activity.

### **A Visitor**

A visitor is a traveler who takes a trip to a destination outside his/her usual environment for not more than 12 months for any main purpose (leisure, business or other personal reason), other than being remunerated by a resident entity in the country/place visited.

### **A Tourist**

A tourist is an overnight visitor.

### **National parks**

An area of international and national importance because of its biological diversity, landscape or national heritage and in which the following activities may be permitted: (a) biodiversity conservation; (b) recreation; (c) scenic viewing; (d) scientific research; and (e) any other economic activity.

### **Museum**

A museum is a nonprofit making, permanent institution, in the service of society and its development, and open to the public, which acquires, conserves researches, communicates and exhibits for the purposes of study, education and enjoyment of material evidence about man and his environment.

### **Wildlife Education Centers**

Is an institution which provides Wildlife Conservation Education and awareness and also serves as the CITES wild animals Rescue Centre.

### **Direct contribution to GDP**

GDP generated by industries that deal directly with tourists, including hotels, travel agents, airlines and other passenger transport services, as well as the activities of restaurant and leisure industries that deal directly with tourists. It is equivalent to total internal Tourism spending within a country less the purchases made by those industries (including imports).

### **Total contribution to GDP**

GDP generated directly by the Tourism sector plus its indirect and induced impacts.

### **Total contribution to employment**

The number of jobs generated directly in the Tourism sector plus the indirect and induced contributions.

## ACRONYMS

AEWA	African–Eurasian Water Bird Agreement
AUTO	Association of Uganda Tour Operators
BBC	British Broadcasting Corporation
BFP	Budget Framework Paper
BINP	Bwindi Impenetrable National Park
BMCT	Bwindi and Mgahinga Conservation Trust
BOQ	Bills of Quantity
CA	Conservation Area
CEDP	Competitiveness and Enterprise Development Project
CEO	Chief Executive Officer
CITES	Convention on International Trade in Endangered Species of Fauna and Flora
CMS	Convention on Migratory Species of Wild Animals
CSOs	Civil Society Organizations
CSWCT	Chimpanzee Sanctuary and Wildlife Conservation Trust
CWM	Certificate in Wildlife and Allied Natural Resource Management
DWM	Diploma in Wildlife and Allied Natural Resource Management
DWT	Diploma in Wildlife Tourism Management
EAC	East African Community
FAM	Familiarity
FAO	Food and Agricultural Organization
FY	Financial Year
GAPR	Government Annual Performance Report
GDP	Gross Domestic Product
GEF	Global Environmental Facility
GMP	General Management Plans
GoU	Government of Uganda
UHTTI	Uganda Hotel and Tourism Training Institute
ICT	Information and Communication Technology
ISO	Internal Security Organization
ITB	International Tourism Bourse
JTMC	Joint Tourism Marketing Committee
KNP	Kibaale National Park
KVNP	Kidepo Valley National Park
LDPG	Local Development Partners Group
LGs	Local Governments
LMNP	Lake Mburo National Park
MBWR	Matheniko Bokora Wildlife Reserve
MDA	Ministries Departments and Agencies
MFNP	Murchison Falls National Park
MGNP	Mgahinga Gorilla National Park
MICE	Meetings Incentives Conferences and Events/Exhibitions

MOU	Memorandum of Understanding
MTEF	Medium Term Expenditure Framework
MTWA	Ministry of Tourism Wildlife and Antiquities
NDP	National Development Plan
PAAP	Protected Area Assessment Programme
PAAZAB	Pan African Association of Zoos and Aquaria
PAs	Protected Areas
PCU	Project Coordination Unit
PES	Payment for Ecosystem Services
PIRT	Presidential Investors Round Table
POATE	Pearl of Africa Tourism Expo
PPDA	Public Procurement and Disposal Authority
PR	Public Relations
PUWR	Pian Upe Wildlife Reserve
QA	Quality Assurance
QENP	Queen Elizabeth National Park
TDA	Tourism Development Areas
TIMS	Tourism Information Management System
ATSPR	Annual Tourism Sector Performance Report
TSWG	Tourism Sector Working Groups
TUGATA	The Uganda Association of Travel Agents
UBOS	Uganda Bureau of Statistics
UHOA	Uganda Hotel Operators Association
UHTTI	Uganda Hotel and Tourism Training Institute
UIA	Uganda Investment Authority
UK	United Kingdom
UNAA	Uganda North America Association
UNDP	United Nations Development Program
UNEP	United Nations Environmental Program
UNESCO	United Nations Educational Scientific and Cultural Organization
UNRA	Uganda National Roads Authority
UNWTO	United Nations World Tourism Organization
USAGA	Uganda Safari Guide Associations
UTA	Uganda Tourism Association
UTB	Uganda Tourism Board
UWA	Uganda Wildlife Authority
UWEC	Uganda Wildlife Conservation Education Centre
UWRTI	Uganda Wildlife Research and Training Institute
WCU	Wildlife Clubs of Uganda
WTM	World Travel Market
WTTC	World Tourism and Travel Council
WWF	World Wildlife Fund

## 1.0 INTRODUCTION

This Tourism Sector Performance Report (TSPR) is an important document for assessing the performance of the Tourism sector. It provides an annual assessment of targets, achievements, outputs and also highlights the major challenges or strategic issues which affect performance. The report includes data and analysis with respect to the agreed key indicators.

### *1.1 Rationale*

The Annual Tourism Sector Performance Report is prepared pursuant to the Public Finance Management Act 2015, Section 13 (c) and other government policies and guidelines such as the Government Annual Performance Report (GAPR). These instruments require the reporting to stakeholders, of sector performance against the targets set at the start of the financial year. The reporting of the Sector's performance necessarily includes the financial and physical performance both at output and outcome levels.

This Annual Tourism Sector Performance report 2018/19 is the 10<sup>th</sup> in the series of Annual Tourism Sector Performance Reports produced by Ministry of Tourism Wildlife and Antiquities, and it builds on the 9<sup>th</sup> Annual Tourism Sector Performance Report for FY 2017/18 produced in November 2018, and discussed at the Tourism Sector Annual Review Conference of that month. The report is the main document that presents a synopsis of the overall performance of the Tourism Sector for the period under review. It tracks progress made and the challenges encountered by the sector in its efforts to achieve the broad and specific policy objectives.

This report provides timely and focused information to the decision makers and other stakeholders on the performance of the sector during the Financial Year 2018/19 and the previous years. The report highlights what has been delivered at output, outcome and impact levels in areas of Tourism development and Wildlife and Cultural heritage conservation. The report looks at what outcomes are being realized in terms of actual changes in the quality, access and utilization of tourism services, products and infrastructure. It provides for accountability for the spending of the sector budget, and outlines key areas of performance and under-performance. Fundamentally, the Report is designed and timed to guide decision makers on where emphasis and resources need to be placed in the coming Financial Year and the medium term.

The timing of this report, produced in advance of the preparation of the Budget Framework Paper FY 2020/21 (BFP), will enable the focus of the budget, and the decisions over allocations between sector priorities, to be informed by discussions on this performance report at various fora.

## *1.2 Objectives and Scope*

The objective of the Annual Tourism Sector Performance Report is to provide timely, focused information to the decision-makers and other stakeholders on the performance of the sector during the previous Financial Year and the recent past. The report focuses on the performance of the Tourism Sector against the key objectives outlined in the Tourism Sector Development Plan (TSDP) 2015/16 – 2019/20, and of the medium term sector objectives and budget spending across the six sector MDAs who implement this plan, and in turn that constitute the annual planning and budgeting framework of the Sector MDAs.

The report presents the performance of the Ministry of Tourism Wildlife and Antiquities (MTWA), Uganda Tourism Board (UTB), Uganda Wildlife Authority (UWA), Uganda Wildlife Conservation Education Centre (UWEC), Uganda Hotel and Tourism Training Institute (UHTTI) and Uganda Wildlife Research and Training Institute (UWRTI) during Financial Year 2018/19. The progress towards the improvement of tourism support infrastructure is assessed with emphasis on tourism roads.

## *1.3 Authorship and structure of the report*

This performance report is a product of a combined effort by the Ministry of Tourism, Wildlife and Antiquities and affiliated Agencies. Although the majority of the analysis and writing has been led by the Ministry, the sector Agencies have made significant input and contribution at all stages of the report preparation.

This Performance Report is, to the extent possible, a complete and accurate representation of the sector's performance relative to the goals and priorities set out in the Ministerial Policy Statement FY 2018/19 and the undertakings made during the 9<sup>th</sup> Annual Tourism Sector Review Conference.

## *1.4 About Uganda's Tourism Sector*

Tourism is increasingly being recognized as an important sector of Uganda's economy to support its economic diversification. Currently Uganda's leading foreign exchange earner with US\$1.6 billion in 2018. In addition to generating foreign exchange earnings and creating jobs, tourism promotes trade and investment and significantly contributes to the development of other sectors of the economy, such as construction, manufacturing, retail and financial services. In Uganda, the sector has been robust over the past years and has successfully grown in terms of visitor arrivals, conference business, and investments in the tourist accommodation facilities. It is increasingly becoming a key source of livelihood and pride, helping to support families, and to build communities throughout the Country.

Uganda's tourism largely rides on her natural endowments which give an edge over many of the popular tourist destinations in Africa. Uganda has an abundance of diverse tourist attractions ranging from abundant and diverse wildlife, culture, landscapes and water bodies. Uganda stands out in Africa because the country has more than 50% of the world's remaining

population of mountain gorillas, over 1,060 species of birds, constituting 11% of the global population of bird species, 345 species of mammals, 86 species of amphibians, 142 species of reptiles, 1,249 species of butterflies, over 600 species of fish and over 5,406 species of flora.

Uganda is also home to the source of River Nile (the longest river in the world) Lake Victoria (the largest fresh water lake in Africa) and Mt Rwenzori, the legendary mountains of the moon, the only mountain in the world with a snow cap on the equator.

The country has 10 national parks, 12 wildlife reserves, 10 wildlife sanctuaries, 5 community wildlife management areas and 506 central forest reserves each with unique endowments: for example, Murchison Falls National Park is home to the lions, elephants, leopards, buffaloes, giraffes and lots of other species, and the spectacular waterfalls while Queen Elizabeth National Park boasts of big five, the spectacular Kazinga Channel and climbing lions. Furthermore, Bwindi Impenetrable National Park offers true pristine and virgin tropical forests with Mountain Gorillas, tropical forest elephants, Chimpanzees and a host of birds and primates.

Uganda's rich culture is also something to explore, from the captivating dances to exquisite cuisines in the different parts of the country, as well as the friendly and hospitable people. Additionally, Uganda's favourable climate is alluring to potential visitors. The plateau and elevation of the terrain results in a more moderate climate than otherwise would be expected by the country's equatorial location.

Uganda is also a fast rising destination for visitors for MICE (Meetings, Incentives, Conferences and Events). It is the focus of the sector to strengthen the East African Community tourism development partnership initiatives, and aggressively promote Uganda in the region as a viable destination for leisure and MICE visitors.

The sector is coordinated and superintended by the Ministry of Tourism Wildlife and Antiquities under the political leadership of the Minister of Tourism, Wildlife and Antiquities. Under the Ministry are implementing Agencies: Uganda Tourism Board (UTB) for tourism promotion and marketing, Uganda Wildlife Authority (UWA) for the management and conservation of wildlife and wildlife protected areas, Uganda Wildlife Conservation Education Centre (UWEC) for conservation education and public awareness, Uganda Hotel and Tourism Training Institute (UHTTI) for tourism and hospitality training and Uganda Wildlife Research and Training Institute (UWRTI) for wildlife management training and research. The Ministry also oversees a number of program institutions including Chimpanzee Sanctuary and Wildlife Conservation Trust (CSWCT), Rhino Fund Uganda (RFU) and Bwindi-Mgahinga Conservation Trust (BMCT).

The Private Sector plays a significant role in the development and management of the tourism sector and thus participation of the private sector players in governance and regulation of the sector is paramount. The Ministry and Agencies coordinate with the private sector through Uganda Tourism Association (UTA) which is the Tourism private sector apex body with membership of Uganda Hotel Owners Association (UHOA), Hotel and Catering Association

of Uganda (HCAU), Uganda Community Tourism Association (UCOTA), Uganda Safari Guides Association (USAGA), The Uganda Travel Agents Association (TUGATA), National Arts and Cultural Crafts Association of Uganda (NACCAU) and the Association of Uganda Tour Operators (AUTO). The Ministry regards these associations as important entry points in fostering public private sector dialogue, advocacy and development initiatives for the sector.

Development Partners and the Civil Society Organizations also play a critical role in supporting the sector by getting involved in tourism related activities, ranging from conservation to livelihood improvement. These activities include mobilization of technical and financial resources to support government efforts, preservation of the resources upon which tourism is based, Influencing policy development, marketing, public sensitization and awareness about tourism potential and opportunities, research, and advocacy for community capacity enhancement.

Over the 2<sup>nd</sup> National Development Plan period, the sector's overall aim is to progressively increase the contribution of tourism to GDP, creating employment for Ugandans and foreign exchange earnings for the country as well as upholding the principles of sustainability and inclusiveness. The overall aim will be achieved through

- i. Aggressive promotion and marketing of Uganda to unlock the country's tourism potential
- ii. Diversifying tourism product range
- iii. Improving tourism and hospitality skills along the tourism value chain
- iv. Strengthening conservation of natural and cultural heritage.

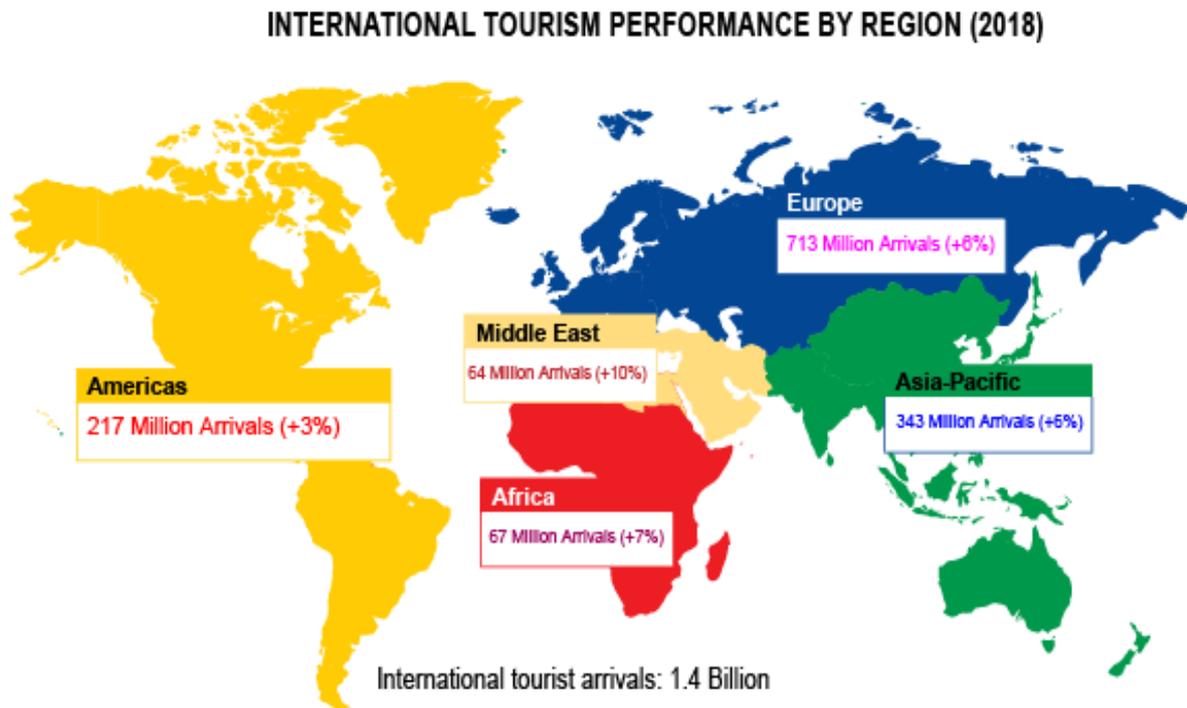


## 2.0 OVERVIEW OF PROGRESS OF THE TOURISM SECTOR

This Chapter presents the overview of the performance of the tour and travel industry at the global, regional and national levels. It provides an insight of Uganda's position in the global tour and travel economy.

### 2.1 Global Tourism Performance in 2018

Figure 1: International Tourism Performance by Region



Source: UNWTO highlights (2019)

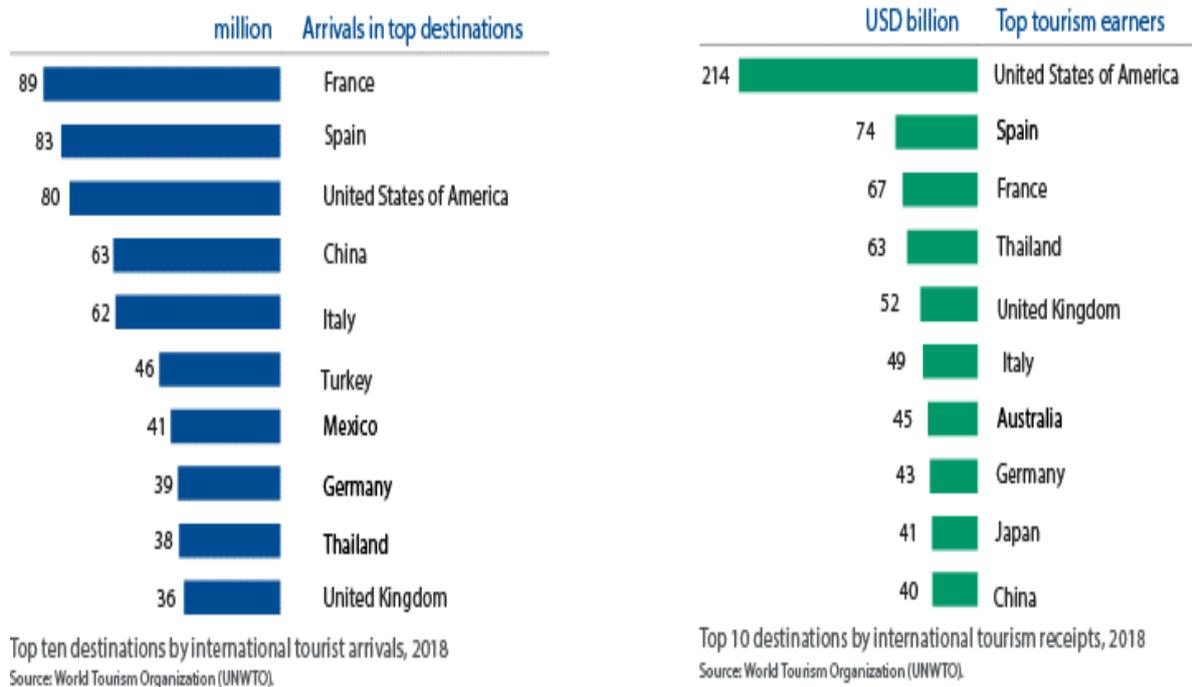
As one of the world's largest economic sectors, Travel & Tourism creates jobs, drives exports, and generates prosperity across the world. 2018 totaled 1.4 billion international tourist arrivals, consolidating 2017 strong results and proving to be the second strongest year since 2010. This was an increase of 6 percent over 2017, clearly above the 3.7% growth registered in the global economy. In relative terms, the Middle East (+10%), Africa (+7%), Asia and the Pacific and Europe (both at +6%) led growth in 2018. The growth of tourism in recent years confirms that the sector is today one of the most powerful drivers of economic growth and development. This growth, in turn, enables job creation.

Travel & Tourism sector accounted for 10.4% of global GDP and 319 million jobs, or 10% of total employment in 2018. Travel & Tourism, which already supports one in every ten jobs on the planet, and has accounted for one in five of all jobs created across the world over the past five years, is a dynamic engine of employment opportunities. Jobs in Travel & Tourism particularly support women, youth and other, often marginalized groups of society.

## 2.2 Top Destinations in the World

The top 10 destinations shown in figure 2 below receive 40% of worldwide arrivals. The top 10 tourism earners account for almost 50% of total tourism receipts and 8 out of the 10 top destinations are featured in both rankings.

Figure 2: Top Destinations and Tourism spenders in the World



## 2.3 Tourism Performance in Africa

Figure 3: Tourism Performance in Africa, 28



Source: World Tourism Organization (UNWTO)

International tourist arrivals in Africa reached 67 million in 2018, a notable 7% increase over an exceptionally strong 2017. Growth was driven by North Africa (+10%) and Sub-Saharan

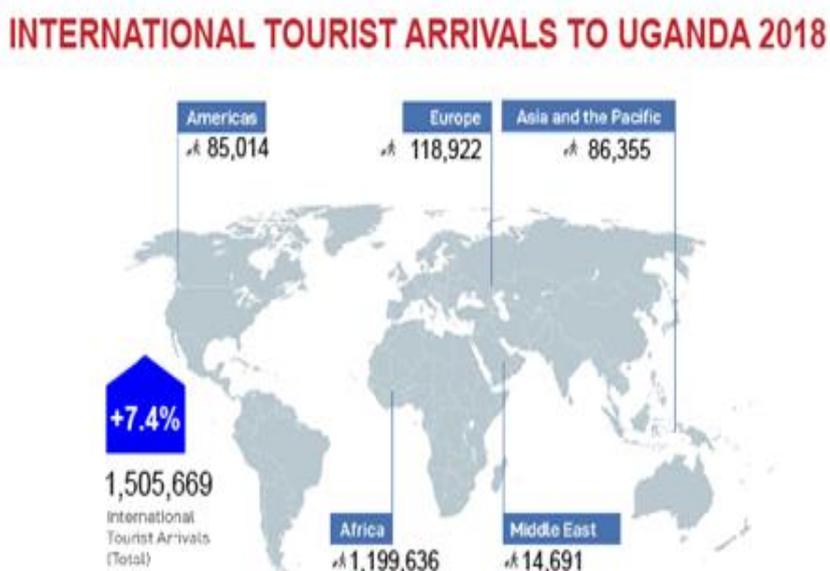
(+6%). Overall results were driven by a favorable Economic Environment and strong outbound demand from major Source Markets.

In Sub-Saharan Africa where Uganda lies, island destinations of Reunion, Cabo Verde, Comoros, Mauritius and Seychelles posted robust growth. Kenya, Togo, **Uganda**, Côte d'Ivoire and Zimbabwe recorded positive results. The sub region's most visited destination was South Africa.

## 2.4 Tourist Arrivals and Contribution to the Ugandan Economy<sup>1</sup>

With a plethora of natural attractions, Uganda's tourism sector is well poised to be the leading growth and development sector in the country. Tourists come from all over the world to visit the 12 national parks, mountains such as Mt. Rwenzori and Mount Elgon, the exquisite waterfalls, the Source of the Nile and the various cultural sites.

Figure 4: Tourist Arrivals to Uganda, 2018



Source: MTWA & UBOS

Uganda witnessed a 7.4% increase in international tourist arrivals in 2018, growing from 1,402,409 in 2017 to 1,506,669 in 2018. Direct revenue from international tourism rose to US\$1.6 billion in 2018, compared to US\$1.453 billion in 2017.

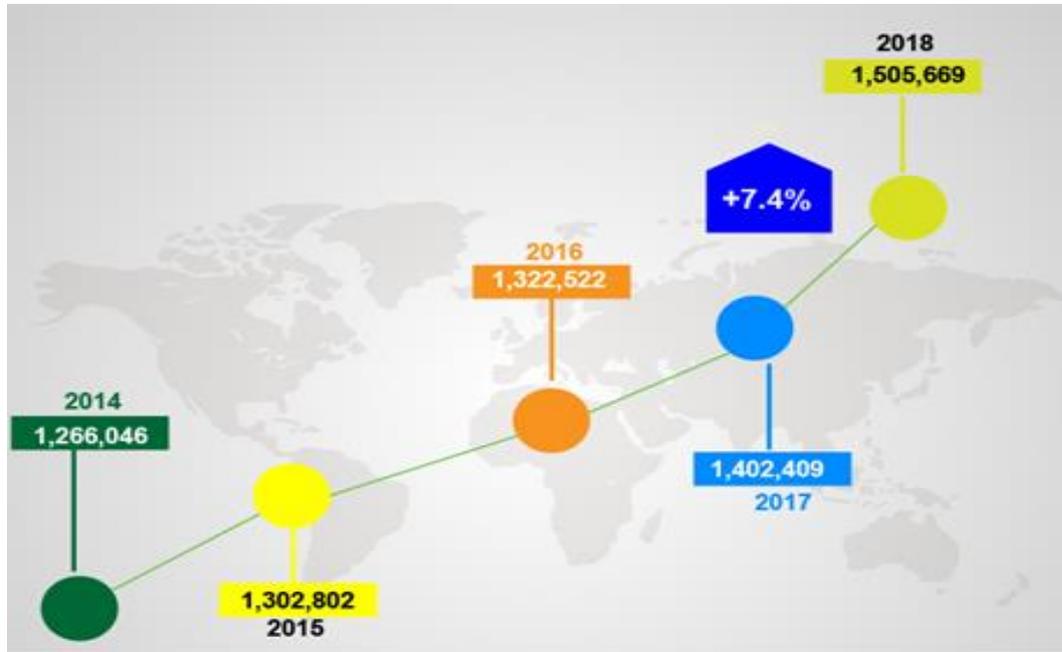
In terms of arrivals, Uganda's international tourism performance in 2018 was above the rate of continental and global tourism growth. Tourists from international air accounted for approximately 31% of the total international tourist arrivals to Uganda in 2018, growing by 10.2% compared to the previous year. Growth was recorded from Europe (+13.8%), the Americas (+9.2%), Asia (+10.2%) and the Middle East (+9.7%) in 2018.

<sup>1</sup> Figures for the Economic impacts of tourism in Uganda (Contribution to GDP, employment and foreign exchange earnings) are based on the World Travel & Tourism Council Economic Reports -2019. Figures on tourist arrivals to Uganda in 2018 are based on estimates from a time series model with a margin of error 0.02.  
*Annual Tourism Sector Performance Report FY 2018/19*

African land markets (regional and neighbouring countries) that entered Uganda by road make up 69% of Uganda’s international arrivals, and grew by only 6.1% in 2018.

## 2.5 Trend of Tourist Arrivals to Uganda

Figure 5: Trend of Tourist Arrivals, 2014-2018

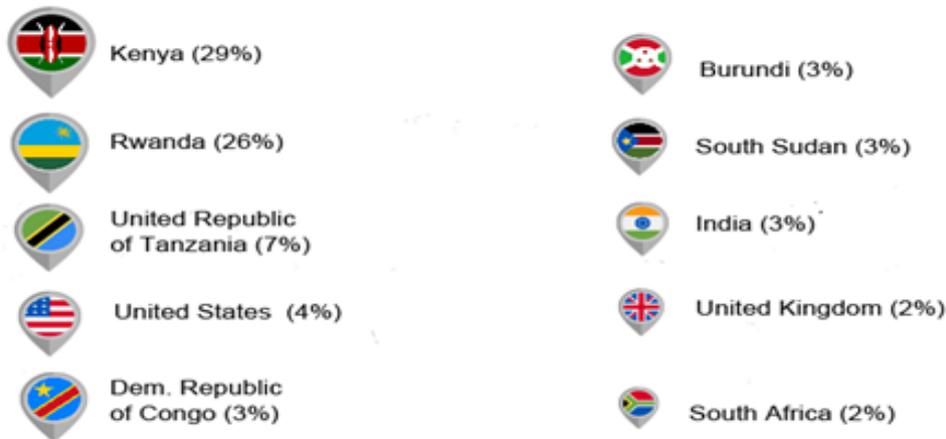


Source: MTWA & UBOS

Over the past 10 years, the tourist arrivals into Uganda have steadily increased from 850,000 arrivals in 2008 to over 1.505 million arrivals in 2018. This growth, in turn, enables job creation. The increase in arrivals in 2018 is largely attributed to increased marketing efforts (both domestic and Abroad), improved connectivity and infrastructure, Prioritization of the sector, good will from stakeholders which has increased participation and understanding of Tourism and its role in the economy, Increased investment in Tourism enterprises, stable political environment and improved conservation efforts that have seen increases in wildlife species.

## 2.6 Top ten Tourist Source Markets for Uganda in 2018 with % Market Share

Figure 6: Top ten (10) Tourist Source Markets in 2018



Source: MTWA & UBOS

The top ten sources of tourist arrivals into Uganda made up about 82 per cent of the total arrivals. Kenya and Rwanda combined to provide 55 percent of all tourist arrivals in 2018. The other top ten markets were Tanzania (7%), United States of America (4%), Dem. Republic of Congo (3%), Burundi (3%), South Sudan (3%), India (3%), United Kingdom (2%), and South Africa (2%).

## 2.7 Tourist Arrivals by Purpose

Figure 7: Tourist Arrivals by Main Purpose, 2018



Source: MTWA & UBOS

Tourists are classified into four main categories, namely Leisure & Holiday, Visiting friends and relatives, Business tourists and “other purpose tourists”. Among all tourists visiting Uganda, visiting friends and relatives were the largest number followed by Business visitors.

In 2018, the largest number of visitors into Uganda was visiting friends and relatives with 523,749 visitors (34.8%). The purpose of Business and professional conferences registered 432,070 visitors came second (28.7%), while leisure and holiday 311,335 visitors came third (20.7%).

## 2.8 Tourism Earnings

In 2018, Tourism continued to be the leading foreign exchange earner to the Ugandan economy by generating USD 1.6 billion <sup>2</sup>from the 1,505,669 visitors compared to USD 1.45 billion in 2017. The category of visitors with the highest expenditure is leisure visitors, who made up 20.7% of the total visitors.



## 2.9 Contribution of Tourism to GDP



The total contribution of Tourism to GDP, including wider effects from investment, the supply chain and induced income impacts, was UGX 8,364.6 billion in 2018 (7.7% of GDP). This contribution primarily reflects the economic activity generated by industries such as hotels, travel agents, airlines and other passenger transportation services (excluding commuter services). But it also includes, for example, the activities of the restaurant and leisure industries directly supported by tourists.

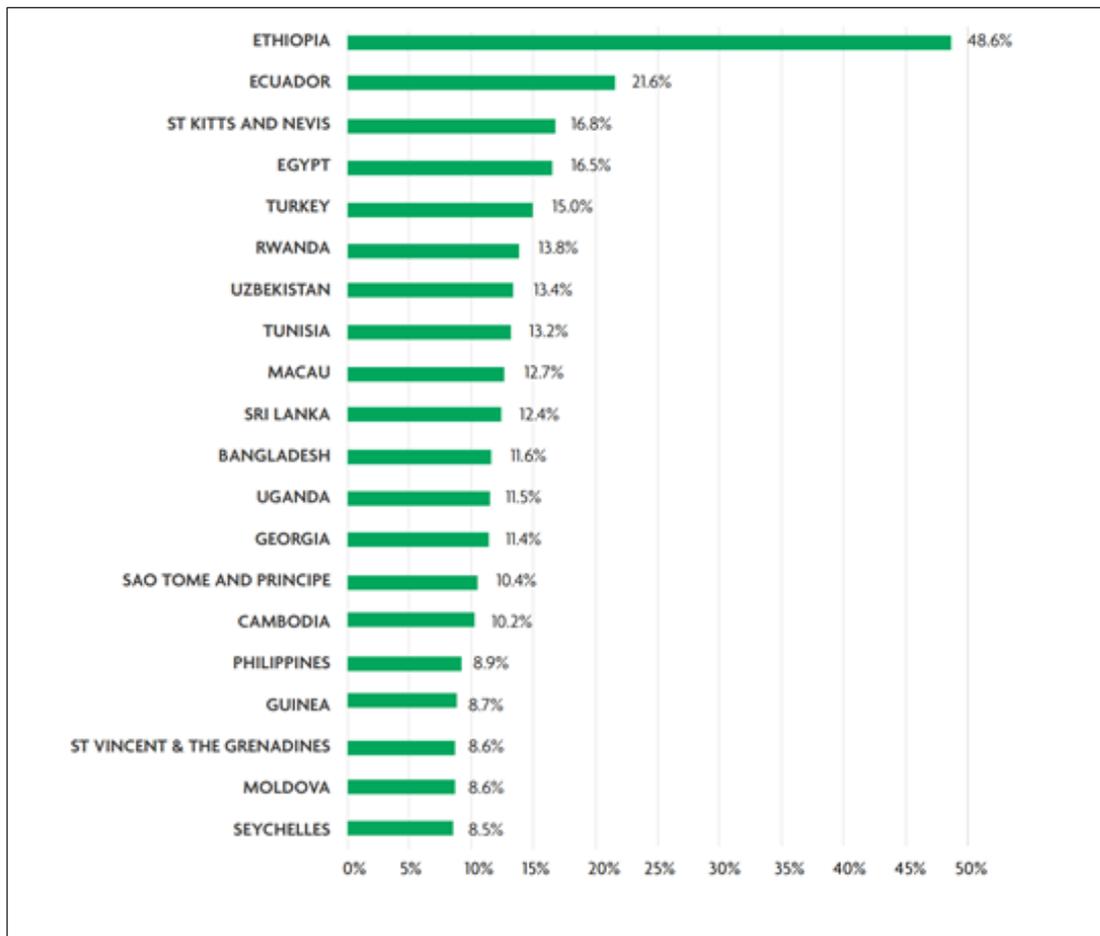
### 2.9.1. Top 20 Fastest Growing Travel & Tourism Economies

According to the World Tourism Organization, the world's list of fastest growing countries in terms of Travel & Tourism GDP are dominated by emerging and developing economies.

Uganda (+11.5%) is ranked 12<sup>th</sup> among the fastest growing Travel and Tourism Economies in the world after Ethiopia (+48.6%), Ecuador (+21.6%), St Kitts and Nevis (+16.8%), Egypt (+16.5%) and Turkey (+15.0%) as shown in Figure 8 below;

<sup>2</sup> The Tourism earnings estimated from the Average length of stay of Tourism Expenditure and Motivation Survey (TEMS) 2012

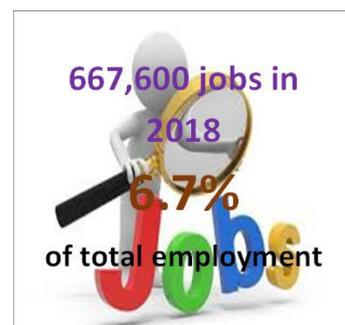
Figure 8: Top 20 Countries - Travel & Tourism GDP Growth, 2018



Source: World Tourism Organisation (UNWTO)

### 2.10 Tourism contribution to employment

Tourism generated 667,600 jobs in 2018 (6.7% of total employment) and this is forecast to grow to 971,900 in 2029. This includes employment by hotels, travel agents, airlines and other passenger transportation services (excluding commuter services). It also includes, for example, the activities of the restaurant and leisure industries directly supported by tourists. The total contribution of Tourism includes its wider impacts (i.e. the indirect and induced impacts) on the economy. The indirect contribution includes the GDP and jobs supported by Tourism investment spending, Government collective spending and Domestic purchases of goods and services by the sectors dealing directly with tourists



## 2.11 Summary of Economic Impacts

Figure 9: Economic Impacts



## 2.12 Occupancy rates in Hotels and Similar Establishments

This focuses on both Bed and Room Occupancy rates for short-term accommodation in hotels and similar accommodation establishments. The Hotel Room occupancy rate is the ratio between occupied rooms and available rooms whereas the Hotel bed occupancy rate refers to the proportion of beds occupied in relation to the available beds.

### 2.12.1 Hotel Room Occupancy rates

The overall Hotel room occupancy rate for the year 2018 was 50.9 percent being highest between July-September, 2018 and lowest at 48.4 percent between January-March of 2018. Figure 10 below further shows that the hotel room occupancy rate marginally increased from 48.4 percent during the period January-March 2018 to 51 percent for the period October-December 2018

Figure 10: Hotel and Room Occupancy Rates (percent).



Source: Uganda Bureau of Statistics

### 2.12.1.1 Hotel Room Occupancy Rates by Region in 2018

The Hotel room occupancy rates did not differ much by region during the year 2018. The highest room occupancy rate in 2018 (55%) was registered in the Eastern region while the lowest (48%) was registered in the Western region. Kampala Hotel room occupancy rate decreased from 50 percent between January-March 2019 to 45 percent between October-December 2018. Table 1 shows the details.

Table 1: Hotel Room Occupancy by Month and Region, 2018 (%)

Region	Room Occupancy Rate ( percent)				Overall Jan-Dec 2018
	Jan- Mar 2018	April- Jun 2018	Jul-Sept 2018	Oct-Dec 2018	
Central	48.0	46.3	49.5	52.1	48.7
Eastern	49.0	51.1	54.3	62.3	54.9
Kampala	49.7	56.8	56.3	44.8	52.0
Western	44.0	50.1	51.8	46.2	47.6
Northern	49.4	51.8	54.3	56.5	52.6
<b>Total</b>	<b>48.4</b>	<b>50.9</b>	<b>52.9</b>	<b>51.5</b>	<b>50.9</b>

Source: Uganda Bureau of Statistics

### 2.12.1.2 Hotel Room Occupancy Rates by Type of Establishment in 2018

The highest hotel room occupancy rate in 2018 was 75 percent for Lodges, this was followed by Motels at 73 percent while Vacation hotels had the lowest room occupancy rate of 33 percent.

Table 2: **Hotel Room Occupancy by Month and Accommodation Type, 2018 (%)**

Accommodation Type	Hotel Room Occupancy Rate ( percent)				
	Jan-Mar 2018	April-Jun 2018	Jul-Sept 2018	Oct-Dec 2018	Overall Jan-Dec 2018
Town Hotel	31.4	48.6	51.0	48.3	38.6
Vacation Hotel	29.7	47.2	45.6	55.7	32.5
Motel	68.6	68.1	64.7	50.2	72.5
Lodge	64.2	46.6	51.6	58.6	75.1
Cottage	31.0	38.8	44.1	50.2	38.3
Guest House	44.4	56.8	57.5	49.6	41.6
Other	43.2	36.4	58.0	70.0	56.0
	-	-	-	-	-
<b>Total</b>	<b>48.4</b>	<b>50.9</b>	<b>52.9</b>	<b>51.5</b>	<b>50.9</b>

Source of data: Uganda Bureau of Statistics

### 2.13 Hotel Bed Occupancy rates

The overall hotel bed occupancy rate for 2018 in Uganda was 43.8 percent with the highest being registered in Eastern sub-region (50%) and the lowest in the Western sub-region (42%) as shown below.

Table 3: **Bed Occupancy by Financial Year Quarters and sub region, 2018 (%)**

Region	Bed Occupancy Rate (%)				
	Jan-Mar 2018	April-Jun 2018	Jul-Sept 2018	Oct-Dec 2018	Overall Jan-Dec 2018
Central	37.6	42.6	42.2	43.9	42.9
Eastern	51.1	42.4	49.0	60.5	50.3
Kampala	30.3	49.4	53.2	38.1	47.7
Western	43.2	43.0	35.4	46.3	42.0
Northern	41.5	45.0	46.6	47.8	44.8
<b>Total</b>	<b>37.8</b>	<b>44.9</b>	<b>46.3</b>	<b>45.4</b>	<b>43.8</b>

Source of data: Uganda Bureau of Statistics

### 2.14 Visitors to National parks

Uganda has ten national parks and two game reserves (See Table 4). These offer a wide range of tourism products including gorilla tracking, nature guided walks, village walks, butterfly and bird watching, rare fauna and flora species.

Figure 11 shows that there has been an increasing trend in the number of visitors to the national parks from 2014. Visitors to National Parks increased from 202,885 in 2014 to 325,345 in 2018 posting a 14% increase in 2018.

Figure 11: Visitors to National Parks, 2014 – 2018



Source: MTWA, 2018

The most commonly visited national park in 2018 was Murchison Falls (31.4 percent) followed by Queen Elizabeth (26.7 percent) and Bwindi Impenetrable National Park (11.5 percent). These three collectively account for over two thirds of the visitors to all the National Parks. See table below;

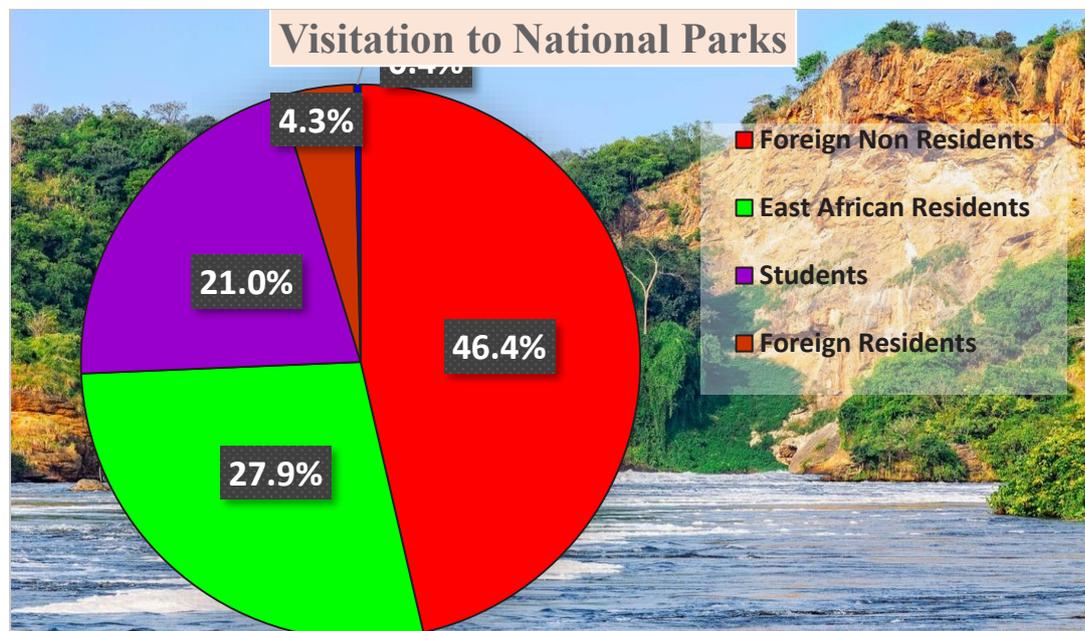
Table 4: Visitors to National Parks, 2017-2018

Categories	Jan-Dec 2018 compared with Jan-Dec 2017				
	Jan-Dec	Jan-Dec	%Age Share 2018	Difference Jan-Dec	% Change 2018-2017
	2017	2018			
<b>National Parks</b>					
Murchison Falls National Park	93,256	102,305	31.4%	9,049	9.7%
Queen Elizabeth National Park	81,660	86,875	26.7%	5,215	6.4%
Bwindi Impenetrable National Park	26,576	37,514	11.5%	10,938	41.2%
Lake Mburo National Park	30,403	35,206	10.8%	4,803	15.8%
Kibale National Park	15,728	18,843	5.8%	3,115	19.8%
Kidepo Valley National Park	11,018	12,056	3.7%	1,038	9.4%
Semliki National Park	12,850	16,628	5.1%	3,778	29.4%
Mgahinga National Park	5,505	6,781	2.1%	1,276	23.2%
Mt. Elgon National Park	4,391	3,405	1.0%	(986)	-22.5%
Rwenzori Mountains National Park	3,633	5,146	1.6%	1,513	41.6%
Toro Semliki National Park	651	586	0.2%	(65)	-10.0%
<b>Total Visitors to National Parks</b>	<b>285,671</b>	<b>325,345</b>	<b>100%</b>	<b>39,674</b>	<b>13.9%</b>

Source: MTWA, 2018

Figure 12 shows the distribution of visitors to the national parks in 2018 by category. The highest percentage (46.4 percent) of visitors to national parks were non-residents of foreign origin followed by residents from East African partner states and Ugandan students accounting for 28 percent and 21 percent respectively.

Figure 12: 2018 Visitors (Citizens and foreigners) to national parks (Percentage)



Source: MTWA, 2018

### 2.15 Visitors to other Selected Tourist Sites and Museums

Visitors to selected Tourist Sites and Museums rose from 488,239 recorded in 2017 to 581,616 visitors recorded in 2018. Table 5 below shows that there was improved performance from visitors to the Uganda Wildlife Conservation Education Centre (Zoo) and the Source of the Nile in Jinja.

Table 5: Visitors to Other Selected Tourist Sites and Museums, 2017-2018

Tourist Site	Jan-Dec 2017	Jan-Dec 2018	%Age Share 2018	Difference Jan-Dec	% Change 2018-2017
Uganda Wildlife Education Centre	331,625	364,121	63%	32,496	9.8%
Source of the Nile	102,324	163,117	28%	60,793	59.4%
Uganda Museum	54,290	54,378	9%	88	0.2%
<b>Total</b>	<b>488,239</b>	<b>581,616</b>	<b>100%</b>	<b>93,377</b>	<b>19.1%</b>

Source: MTWA, 2018

Ugandan citizens continued to constitute the largest number of visitors to Tourist Sites and Museums in 2018. Among the non-residents, adults constituted the highest number of visitors to Tourist Sites and Museums in 2018.

## 2.16 Potential of Conference Tourism

MICE Tourism is a critical segment that should indeed be given increased attention in Uganda's Tourism Industry. Although the MICE Bureau was established in FY 2018/19, a number of benefits have already been realized. For instance, a total of US\$ 1.19 million was earned in 6 international conferences hosted by Uganda over the period January – June 2019. The conferences had delegates ranging from 30 to 400 delegates with each spending an average of US\$ 395<sup>3</sup> per day. The details of these conferences are presented in the table 6 below.

Table 6: Selected Conferences between January-June 2019

Name of Conference	Africa Now Conference	FIDIC GAMA Conference 2019	Uganda Turkish Business Forum	African Hepatitis Summit	4th African Tea Convention	1st meeting of the African-Eurasian Migratory Water bird Agreement (AEWA)	Total
Number of international delegates	400	60	134	200	295	30	1,119
Duration of the Conference	2	4	3	3	3	3	18
Number of delegate days	800	240	402	600	885	90	3,017
Average Expenditure (US\$)	395	395	395	395	395	395	395
<b>Revenues earned (US\$)</b>	<b>316,000</b>	<b>94,800</b>	<b>158,790</b>	<b>237,000</b>	<b>349,575</b>	<b>35,550</b>	<b>1,191,715</b>

Source: MTWA, 2019

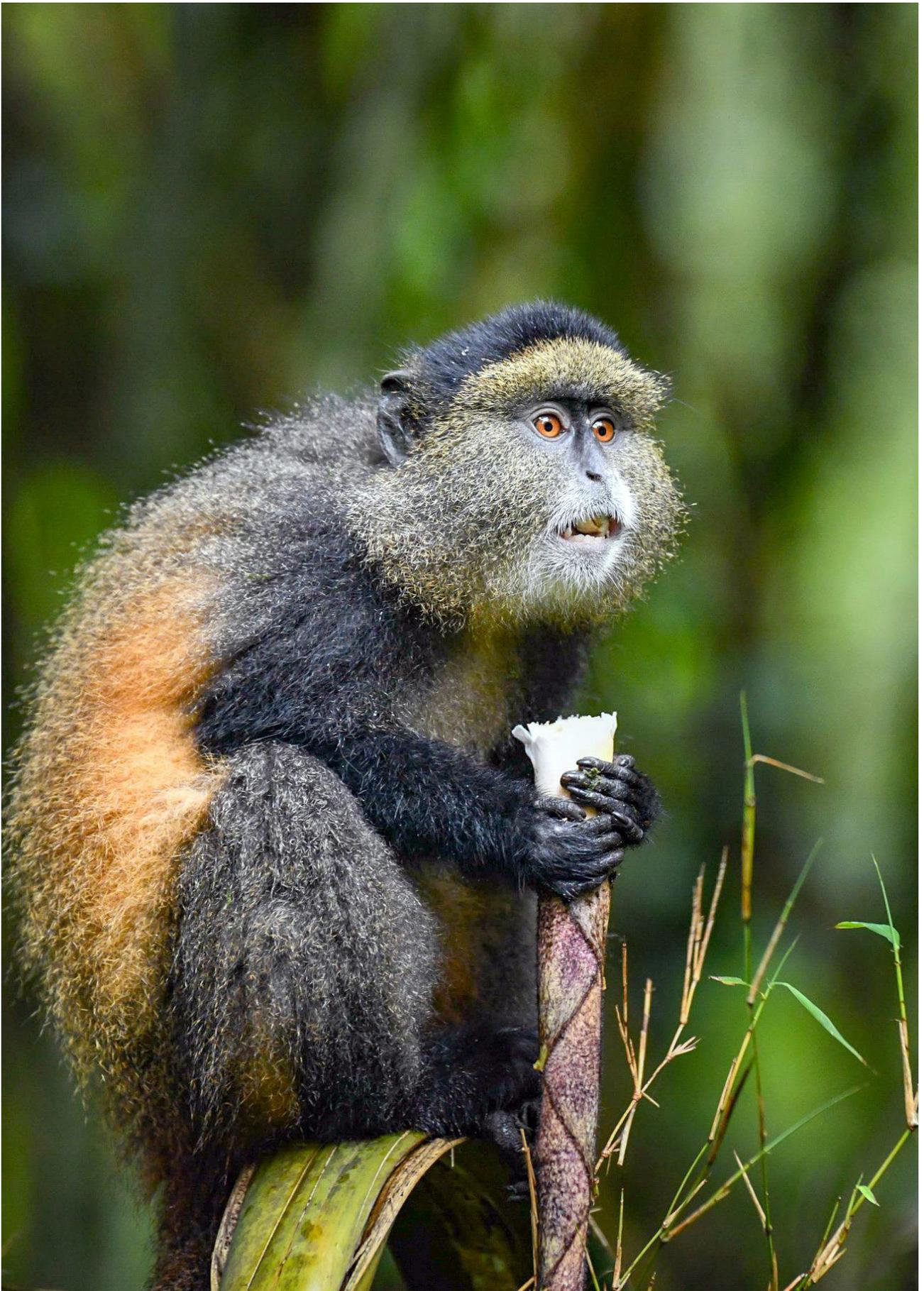
Meanwhile, there is an ongoing bidding for more conferences expected to take place over the period June- December 2019. These four conferences are expected to earn Uganda US\$ 4.15 million in forex earnings once Uganda is able to host them.

Table 7: Conferences in bidding Process, June-December 2019

Number of Conferences in bidding process	Regional International Society For The Prevention of Child Abuse and Neglect ( ISPCAN)	FISE World Series	African Nutrition Society Congress	Velocity	Total
Number of international delegates	500	1,000	500	500	2,500
Duration of the Conference	4	5	3	4	16
Number of delegate days	2,000	5,000	1,500	2,000	10,500
Average Expenditure (US\$)	395	395	395	395	1,580
<b>Revenues earned (US\$)</b>	<b>790,000</b>	<b>1,975,000</b>	<b>592,500</b>	<b>790,000</b>	<b>4,147,500</b>

Source: MTWA, 2019

<sup>3</sup> The average is based on the research on African Association Conferences which estimates an average expenditure of US\$ 395 per delegate per day.



### 3.0 FINANCIAL PERFORMANCE OF SECTOR MDAS FY 2018/19

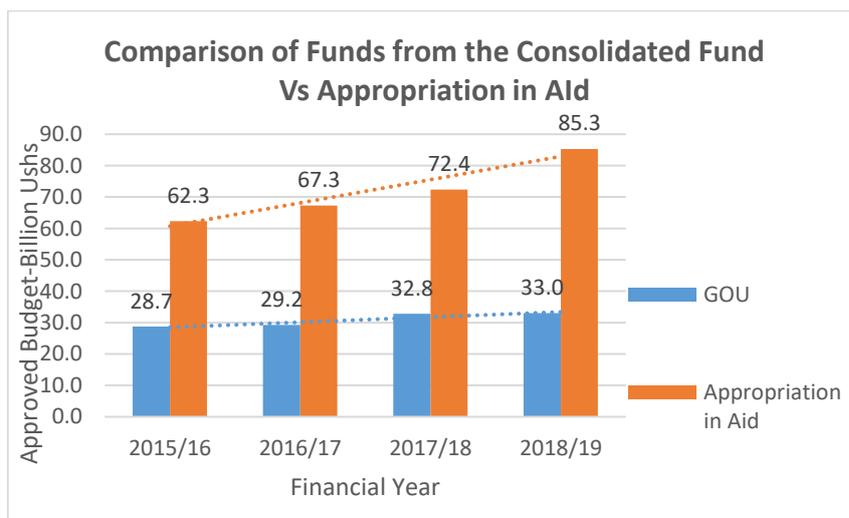
#### 3.1 Direction of Sector financing over the NDP II period

Over the NDP II period i.e since the FY 2015/16, the Tourism sector financing has visibly increased with the approved budget increasing from Ush 91 billion in FY 2015/16 to Ushs 118 billion in FY 2018/19. Most of the increase arose from the internally generated revenue by sector Agencies in form of Appropriation in Aid as presented in the figure 13 below.

Figure 13: Sector Financing over the NDPII period

Changes in Sector funding-Billion Ushs

Financial Year	Approved budget	Increase
2015/16	91.0	
2016/17	96.5	5.4
2017/18	105.1	8.6
2018/19	118.3	13.1



Source: MTWA Ministerial Policy Statements and Financial Performance Reports 2015/16-2018/19

#### 3.2 MDA specific budgets for the Financial Year 2018/19

In the FY 2018/19, the approved budget for the sector was Ushs 118.3 billion and a total of Ushs 115 billion (about 98 percent) of this was spent by end of the financial year.

Table 8: MDA Specific budgets, FY 2018/19

	GOU-from the Consolidated Fund) Billion Ushs	AIA (From Internally generated revenues) Billion Ushs	TOTAL approved Billion Ushs	Spent (Bn Ushs)	%ge spent
MTWA	13.45	0.19	13.64	11.45	91%
UTB	17.22	0.30	17.52	17.30	99%
UWA	0.00	78.19	78.19	78.00	99%
UWEC	0.80	4.44	5.24	4.83	92%
UHTTI	0.90	1.71	2.61	2.50	96%
UWRTI	0.64	0.48	1.11	0.95	85%
<b>TOTAL</b>	<b>33.01</b>	<b>84.30</b>	<b>118.31</b>	<b>115.22</b>	<b>98%</b>

*Source: Ministerial Policy Statement and Quarter Four Performance Reports for Votes 022 and 117, FY 2018/19*

The budget performance was great in terms of approved budget vis a vis expenditure. The expenditure could not reach 100 percent of the approved budget primarily because all the approved funds were not released. Out of the funds appropriated to the Ministry, a total of Ushs 1.1 billion was not released while for the internally generated revenues, UWEC, UHTTI and UWRTI did not realize all the projected revenue during the financial year as presented in the following section.

### 3.3 Revenue generation by Sector MDAs

Financial sustainability has been critical to Uganda's Tourism that is largely reliant on nature-based tourism products. The management of all Uganda's Protected Areas - that cover about 11 percent of the Country's land surface area, is 100 percent funded by internally generated revenue, save for the intervention specific grants received from donors.

In FY 2018/19, all Sector MDAs had projected to generate a total of Ushs 85.3 billion with each generating MDA contributing as reflected in the table 9 below.

Table 9: Revenue generation by sector MDAs, FY2018/19

SECOTOR MDA	TARGET (BILLION USHS)	AMOUNT REALISED (BILLION USHS)	PROPORTION OF THE TARGET REVENUE REALISED
MTWA	0.19	0.18	94%
UWA	78.19	124.31	159%
UWEC	4.44	4.03	91%
UWRTI	0.48	0.31	65%
UHTTI	1.71	1.60	93%
UTB	0.30	0.19	64%
<b>TOTAL</b>	<b>85.31</b>	<b>130.62</b>	<b>153%</b>

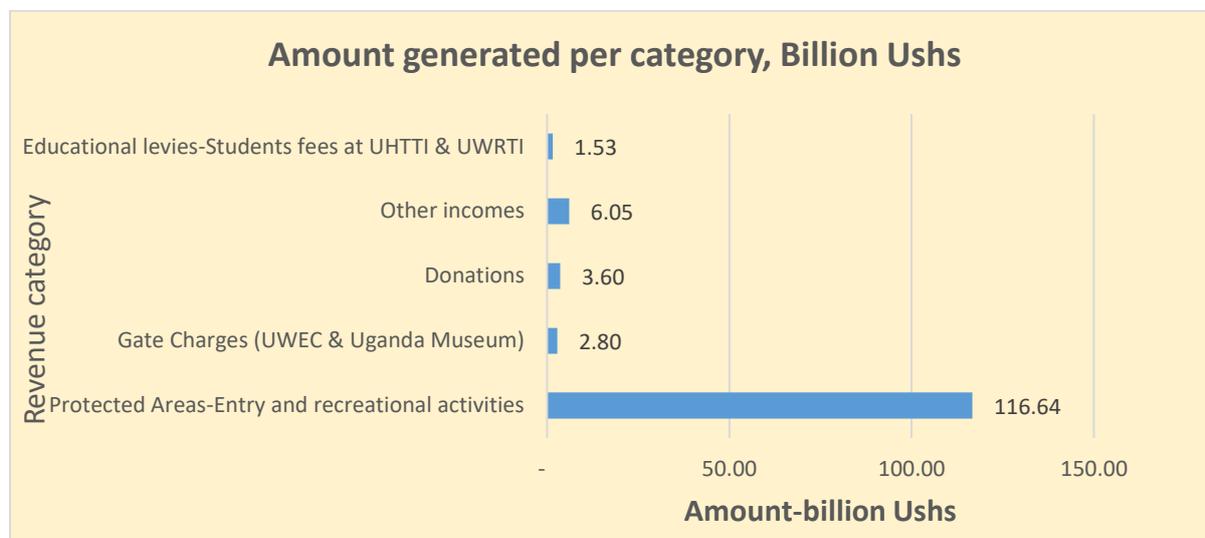
Source: Budget Execution Report, FY2018/19

While only Ushs 85 billion was the revenue projected to be generated from the various activities during financial year, the actual collections were way above the target. However, this good performance was skewed to Protected Areas and is attributed to;

-  Improvements in gorilla sales where about 74 percent of the gorilla tracking permits were sold with some months registering 100 percent sales.
-  Increased visitation-national parks registered 14 percent increase in total visitors and category of foreign non-residents increased by 22.5 percent in FY 2018/19. The intensified marketing efforts both domestically and abroad were responsible for this increase.
-  Improvement of infrastructure and facilities in protected areas- accommodation facilities, domestic tourism buses and boats.
-  Increased automation of the revenue collection systems that have minimized leakages of revenue that are common with manual systems.

### Category of revenues realized by Sector MDAs, 2018/19

Figure 14: Amount generated per category, FY2018/19



Source: Budget Execution Report, FY2018/19

Tourism activities in Protected areas continue to dominate the revenues generated by sector MDAs.

Given that over 70 percent of the Sector's budget is funded from internally generated revenues, it is critical that revenue generation continues to be a key objective for all Sector MDAs to achieve a more sustainable funding for interventions that promote tourism, wildlife and cultural heritage conservation for socio-economic development and transformation of the country.

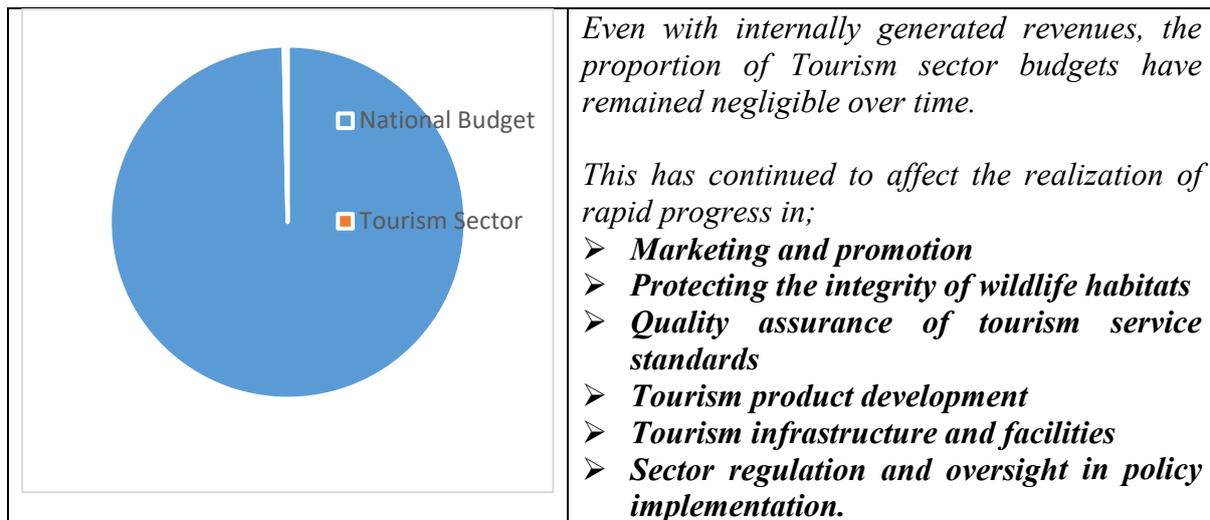
### 3.4 Comparison between Tourism Sector expenditure to the National Budget.

The National Economic Growth Strategy seeks to consolidate interventions towards the attainment of shared prosperity and is built on the rapid industrialization of Uganda's economy linked to high productivity and production in four key growth sectors including, Agriculture, **Tourism**, Minerals, Oil and Gas. It is envisaged that the rapid growth of these sectors is what will provide gainful employment to the majority of Ugandans.

During financial year 2018/19, the Services Sector grew at 7.2 percent, the highest of all sectors and the good performance was largely driven by the tourism and hospitality Sector.

While it is recognized as critical, the Tourism Sector remains largely underfunded, at least when compared to the National Budget. Out of the approved National budget of **Ushs 32.7 Trillion** for the FY 2018/19, only **Ushs. 118 Billion** was allocated to the Tourism Sector translating into **0.36 percent** of the total resource envelope. More still, out of the Ushs 118 billion approved for the sector, Ushs 85 billion was to be internally generated thus only Ushs 33 billion was approved as sector funding from the Consolidated Fund.

Figure 15: Comparison between Tourism Sector expenditure to the National Budget.



*Source of data: MTEF 2018/19*

The above highlights in this section clearly indicate improvements in Uganda’s Tourism sector financing, both from the Consolidated Fund as well as the internally generated revenues. However, there are still inadequacies given the vast amounts of resources required. There is therefore need to enhance the Sector budget by about Ushs 100 billion annually over the NDP III to ensure the development of tourism products, skills development, tourism promotion and marketing, among others.



## 4.0 PHYSICAL PERFORMANCE OF THE SECTOR FY 2018/19

### *4.1 Policies, regulations and governance*

During the financial year, a milestone was registered with the enactment of the Uganda Wildlife Bill 2017 by Parliament and the review of the Tourism Act, 2008 was started with consultations. The Principles for the Museums and Monuments Bill were approved by Cabinet and the Bill is under drafting by 1<sup>st</sup> Parliamentary Counsel. Once enacted, the new Bill will repeal the Historical Monuments Act 1967.

The Domestication Orders for CITES (Convention of International Trade in Endangered Species of wild fauna and flora) is at Parliament level.

Studies such as the expenditure motivation survey were conducted to generate vital tourism information about the performance of Uganda's Tourism Industry. In an effort to improve and ensure availability of timely statistics on tourist arrivals to the country, various steps have been taken to have tourist data captured at point of arrival such as Entebbe International Airport and Border posts. This decentralization of immigration data capture will start soon and we shall be able to disseminate tourist arrivals data on a monthly basis and with improved levels of accuracy.

The Areas Management plans were developed for various protected areas and closer monitoring of oil, gas and hydropower related activities in wildlife habitats has been done to achieve the highest levels of compliance.

Inspection and support supervision was done for sixteen Wildlife use rights holders and five CITES export/import border points to ensure compliance with conservation policy and CITES. The Ministry endeavored to undertake regular inspection of protected areas and tourism events to ensure compliance with govern policies.

For improved performance and operational efficiency, all Agencies have Governing Boards and Strategic Plans. The interventions in the financial year were guided by the 2<sup>nd</sup> National Development Plan, whose interventions and activities are detailed in the strategic plans for individual Agencies.

In an effort to enhance sector coordination, the Sector MDAs undertook several engagements with the private sector. This has resulted into improved understanding of sector challenges as well as prioritization of interventions to improve the business environment.

## 4.2 Tourism Promotion and Marketing

Uganda's tourism and investment potential was showcased and marketed to the world at 18 expos and 3 international events i.e. British Bird Watching Fair - Rutland, Kwita Izina - Rwanda, World Travel Market - London, Magical Kenya, Intra African Trade Fair - Egypt, KPRN Road show in 5 German cities, New York Times Travel Show, International Mediterranean Tourism Market Israel, Meetings Africa Expo - South Africa; ITB Berlin; Cairo International Fair; WTM Africa; Indaba Tourism Fair-South Africa, Arabian Travel Market - Dubai, IMEX MICE Expo - Frankfurt, Kili/Karibu Fair - Arusha, China-Africa Economic & Trade Expo, Uganda Canadian Diaspora Business Expo and Convention in Toronto, African Wildlife Fund event in New York; African Cup of Nations - Egypt (AFCON), Akwaaba African travel market-Lagos, and the Cannes Film Festival.



*UTB CEO Ms. Lilly Ajarova shares a light moment with Ugandan tour operators during the Africa Travel Market Expo in Cape Town*



*Ministry of Tourism, UTB Board of Directors & UTB CEO pose for a picture during ITB*



**World Travel Market London**



**Uganda's stall at the Magical Kenya Travel Expo 2018**

UTB supported and leveraged 22 domestic events for domestic tourism promotion i.e. 4 faith based events, 3 sports events, 4 regional culture and heritage events, 2 MICE events, 1 culinary event, 3 historical/national events, 2 avian tourism promotion activations, 1 tourism awareness campaigns and 2 wildlife tourism promotion events.



*Mrs. Claire Mugabi handing over UTB contribution for Martyrs Day Celebrations to the Anglican Church*



16Mr. Herman Olimi, Dr.Derek.R.Peterson and Mr. Okechi Uko, a Nigerian travel business consultant, attend the launch of the Idi Amin exhibition at Uganda National Museum during National Museums Day



*UTB CEO & Hon. Kiwanda Godfrey at the Ekkula Tourism Awards*



Inter-Governmental Authority on Development Delegates enjoying a cultural experience at Ndere Culture Centre during a cultural gala

12 familiarization trips undertaken to improve destination publicity, awareness and product knowledge in all source markets. Familiarization trips were organized for the China (PHG), KPRN & Kamageo Market Destination Representatives and a group of investors from South Africa to Eastern Uganda and 5 National Parks respectively (Kidepo, Murchison Falls, Queen Elizabeth, Kibaale and Mgahinga NPs). These were aimed at improving destination publicity, awareness and product knowledge in all source markets. Other fam trips included:

1. Miss Uganda North America, UK and Miss Tourism 2018 fam trip to Bwindi NP, Eastern Uganda and Karamoja.
2. Israel celebrities fam trip to Western Uganda
3. Malaysian tour operators fam trip to Entebbe and Western Uganda



*Malaysia Tour Operators show off their Gorilla Trekking Certificates at Bwindi Impenetrable Forest NP*

4. Barry Lamford and Shane Kueller, evangelical influencers from North America fam trip to Murchison Fall NP
5. Bollywood visit to Uganda fam trip around Kampala, to Jinja and Karamoja
6. Tulambule ne Zari to Western Uganda with Zarinah Hassan and friends i.e. Iryn Namubiru.
7. Tulambule Northern and Eastern Uganda with Salvador (Patrick Idringi), Moses Golola, Gaetano Kaggwa, Anita Fabiola and Marcus Kwirikiza.
8. Gengis Khan, Southern African investor to Kidepo Valley and Murchison Falls NP.
9. Glenn and Terry Jampol, world renown coffee enthusiasts, fam trip to Kibaale NP
10. Horst Schulze and Global Leadership Summit fam trip to Kidepo NP



Mr. Horst Schulze, UTB Officials, Private Sector Association Heads & GLS arrive at Kidepo National Park



Anita Fabiola and Miss Tourism Karamoja during the Tulambule Eastern Tour in February 2019

A total of six Market Destination Representation (MDR) firms were contracted and deployed to undertake destination representation of Uganda in the tourist source markets of USA, Canada, UK, Germany speaking Countries, Japan, and China as well the Gulf States.

Developed architectural and landscape designs for 6 Equator points i.e. Ntusi, Kiruhura; L. George; Kikorongo-Kasese; Entebbe and Kayabwe-Masaka Road.

50 Media Officials (Editors and Senior Reporters) were trained in patriotic journalism and responsible media/crisis reporting.



**Tourism and Media officials pose for a photo during the Media Training held in Kalangala**

A Media Perception Index survey was conducted to which end a Media Relations Strategy was developed.

169,000 promotional materials, produced and disseminated with support from CEDP. Tourism information was disseminated & tourism events publicized on media platforms as well as electronic billboards in and around Kampala.



Promotional materials produced for distribution at tourism events in the domestic, regional and international markets on display



NBS travel show presenter, Bismarck Amumpaire, strikes a pose with tourism ambassador Zarinah Hassan and Hon. Kiwanda Godfrey during the shooting of the Tulambule ne Zari Campaign

The World Tourism Day celebrations were held in Jinja to which over 5,000 people attended including students, pupils and communities.

Four domestic tourism promotion drives (Tulambule) were conducted in Western, Eastern, Northern Uganda and Murchison Falls National Park with the Social Media Influencers like Zarinah Hassan, Anita Fabiola, Gaetano Kaggwa, Marcus Kwirikiza, Salvador (Patrick Idringi) and Golola Moses. This aimed at popularizing tourism sites and encouraging Ugandans to visit and experience the beauty of their own Country and resources.



Ministry of Tourism and UTB officials pose for a picture with Zarinah Hassan during the flag off of the Tulambule ne Zari Campaign

In an effort to promote Uganda as a MICE destination, the International Convention and Congress Association (ICCA) membership was acquired in collaboration with Uganda Conventions Bureau. For industry stakeholders, educational and MICE networking meetings were held including;

- A Training workshop for MICE targeting hotel venues and professional conference organizers.
- The MICE Bureau retreat.
- A meeting on the formation on the Uganda Association of Conference and Incentives Industry (UACII).
- A stakeholders meeting to promote the mandate of the MICE Bureau

Tourism advertising campaigns and activities were executed via the mediums of billboards and LED boards. Billboards and LED boards across the country were hired to run and showcase tourism promotional content at various strategic points i.e. along the Jinja Nile Bridge, at Oasis

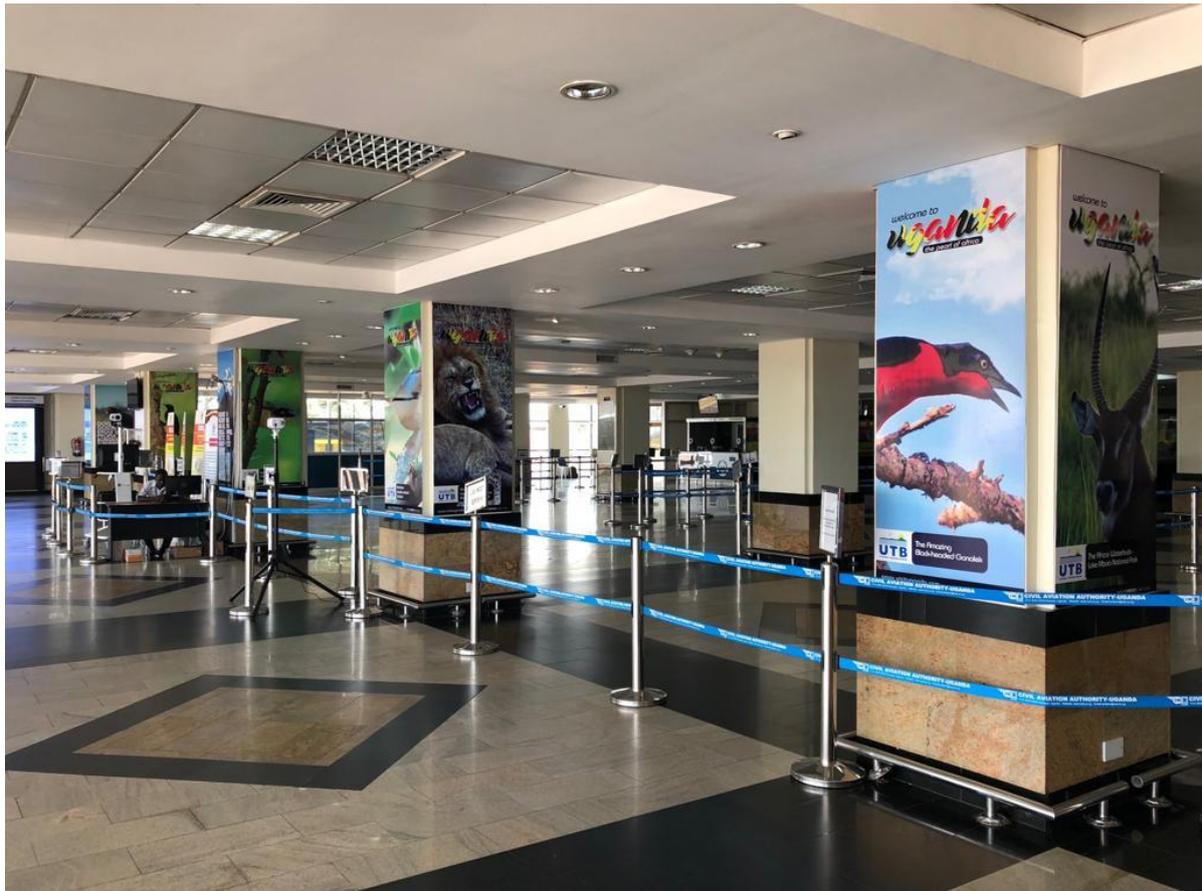
Mall, Kitgum House, Wandegeya, Nyonyi Gardens, Entebbe Airport, Gulu, Masindi, Lira, Adjumani, Kabale, Mbale, to mention a few.



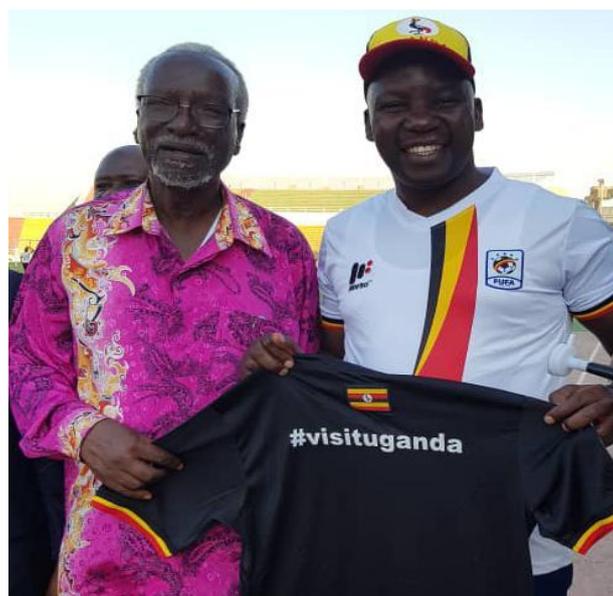
Branding: UTB completed phase 1 of the branding exercise of Entebbe International Airport in the Arrivals Section.



*Senior Marketing Officer takes a tour of the newly branded Arrivals Terminal of Entebbe International Airport*



To build awareness and visibility of Uganda through sports, UTB partnered with FUFA to become the National Football Team's Branding Partner. To this end, the Visit Uganda brand received exposure in 30 countries during AFCON and a total viewership of 8000 during the Ndejje University's football team tournament in China.



*Hon. Kiwanda Suubi Godfrey hands over a VisitUganda branded Uganda Cranes Jersey to First Deputy Prime Minister of Uganda, Hon. Kirunda Kivejinja*

UTB signed a memorandum of understanding with the Uganda Golf Union (UGU) and the Federation of Uganda Football Association (FUFA) to promote the destination through sports (golf and soccer) i.e. the golf tourism niche segment and the National Soccer League: Uganda Cranes.



Outgoing CEO Mr. Stephen Asimwe and UGU Secretary Paul Baite share a handshake during the signing of the MOU as UGU president Innocent Kihika and UTB Marketing Manager Claire Mugabi look on\



Board Member, Mr. Eddy Kiirya & UTB CEO, Ms. Lilly Ajarova signing off MOU with FUFA

Product audits were conducted and a product portfolio developed for the Greater Ankole Region. The portfolio will help address the gap in tourism product information for the region and facilitate development of regional specific and differentiated tourism marketing tools, tourism products and investment opportunities.

UTB collaborated with the Uganda Coffee Development Authority (UCDA) and the private sector to launch coffee tourism as a product. UTB in partnership with MTWA, WWF, UWA and the Busongora Farmers Association further empowered communities to reap from this product by constructing and launching the Rwenzori Coffee House in March, 2019.

In partnership with MTWA, UTB developed guidelines for assessment of agro-tourism farms in the country. 150 applications were received from farmers interested in opening up their farms for agro-tourism. In FY 2019/20, farm visits will be conducted to assess their readiness to host visitors/tourists. UTB undertook product training and sensitization of Rwenzori cluster stakeholders and regional district authorities in implementation of the Rwenzori region's marketing strategy, business plan and brand manual.

### **Accolades and International Media exposure**

In 2018/19, Destination Uganda received a number of awards and Honourable mentions that have continued to propel Uganda towards international recognition. Among the awards received were:

#### **“Best Exhibitor” at the Indaba Travel Show**



**Hon. Ephraim Kamuntu receives the Gold Award during Indaba Tourism Fair**

### **“#1/25 Most Beautiful Place around the World”**

According to CNN Travel’s “Most Beautiful Places around the World”, Bwindi Impenetrable Forest beat 24 other places to be the top ranked beautiful place in the world.

<https://www.cnn.com/travel/artcle/worls-most-beautiful-places/index.html>

### **“#16/19 on the National Geographic Travellers Cool List for 2019”**

The magazine’s hotly anticipated annual “Cool List” names the must-see destinations set to hit headlines for a given year. The destinations placement is credited to the relatively affordable prices for Mountain Gorilla trekking in Uganda over Rwanda’s, as well as their steadily rising population that is considered as one of Africa’s great conservation stories.

<https://www.nationalgeographic.co.uk/travel/2018/12/cool-list-2019>

### **“#16/52 Fodor’s Travel Go List 2019”**

The internationally recognized guidebook publisher and travel authority also featured Uganda on its annual Go List as one of the 52 destinations to visit in 2019.

<https://www.fodors.com/news/photos/fodors-go-list-2019>

### **“#12/1000 Places to See Before You Die”**

Acclaimed travel writer, Patricia Schultz, listed Uganda as one of the 1000 places for travellers to see before they die, in her latest edition of the New York best seller publication. The publication was released during the New York Times Travel Show held in New York, USA.



*Mr. Stephen Asiimwe receives a copy of the 1000 Places to See before You Die Publication during the New York Times Travel Show*

UTB collaborated with foreign missions of Egypt, South Africa and New York to promote Uganda's tourism and investment opportunities during the AFCON, Cairo International Fair, Africa Travel Market and New York Times Travel Show events respectively.

UTB also equipped the missions with promotional collateral to support their destination promotion efforts.



**Uganda Embassy Officials in Cape Town South Africa receive tourism promotion materials**

In 2018/19, UTB successfully launched its strategic plan which will guide the institution in planning and implementing tourism promotion activities and efforts for 2018/19-2019/20.



**Hon. Ephraim Kamuntu, UTB Board of Directors and CEO at the Launch of UTB Strategic Plan**

### 4.3 Conservation and sustainable utilization of wildlife resources

The conservation and responsible utilization of Uganda's wildlife resources is critical, even to the entire tour and travel industry. Currently, over 50 percent of Uganda's tourism can be traced back to the vast pool of Uganda's wildlife resources. The sector though UWA is responsible for Uganda's Wildlife Protected Areas including;

- **10 National Parks:** Murchison Falls, Queen Elizabeth, Kidepo Valley, Mgahinga, Bwindi, Lake Mburo, Mount Elgon, Kibale, Rwenzori, and Semliki.
- **12 Wildlife Reserves:** Semliki, Ajai, East Madi, Kabwoya, Pian Upe, Matheniko Bokora, Katonga, Kyambura and Kigezi wildlife reserves.

As part of the mandate, UWA is also responsible for wildlife outside protected areas in Uganda.

The progress on implementation of some of the deliverables in FY 2018/19 is presented below;

Table 10: **Progress on implementation of Conservation and sustainable utilization of wildlife resources**

#	Target FY 2018/19	Progress	Remarks
	<b>Protected Area boundary management</b>		
1	Undertake boundary management of all the 10 National Parks and 12 Wildlife Reserves.	Routine boundary surveillance and maintenance was done in all PAs with a total of 1,206 kms maintained using various methods including slashing, planting of trees and pillars.	
2	Conducts 14,701 patrols in protected areas as a way of law enforcement to reduce illegal activities.	A total of 16,537 land and 328 marine patrols were conducted. A total of 1,958 suspects were arrested and a number of poaching tools including active wire snares, spears, pangas, knives, metal traps, fish nets, axes and dogs, hooks, canoes, wheel traps, hoes, bows and arrows confiscated.	
3	87 concrete boundary pillars constructed	A total 192 pillars were installed.  New 2.5km in Bwindi were planted with trees to act as live boundary markers.  In Rwenzori Mountain NP, 6 KMs of park boundary were re- enforced with live markers and 15,000 seedlings distributed to communities of Ihandiro, Mihunga and Katebwa for planting at their respective boundaries.  104 km in Kibaale NP boundary harvested and replanted with live markers.	More surveys have been done such as one for East Madi to determine the extent of encroachment. Over 321 households with 1,800 people were found to be living in the reserve. The findings will help in the management of encroachment. Re-opening of Pian Upe WR boundary was completed and pillar construction for clear marking commenced.

#	Target FY 2018/19	Progress	Remarks
4	Value and compensate communities in Ajai WR.	Valuation in Ajai WR was done and the report is in place compensation will be done in FY2019/20.	
5	Value the encroached areas in Mt. Elgon NP.	The MENP boundary survey was completed and the report was presented to the stakeholders in Mbale and Kapchorwa.	



Excavation of elephant trench in Murchison Falls National Park

#	Target FY 2018/19	Progress	Remarks
<b>Human Wildlife Conflict</b>			
6	Maintain existing 210 km and excavate 100kms of elephant trenches in Queen Elizabeth, Murchison falls and Kibaale National parks.	A total of 50.9 new kilometers of elephant deterrent trenches were excavated during the financial year (Murchison Falls, Queen Elizabeth and Kibaale NP).  161.1kms of elephant trenches were maintained.	Activity implementation affected by inadequate labor supply by communities.
7	Construct 5 crocodile cages in crocodile prone areas	6 crocodile Exclusion Enclosures (cages) constructed (1 Mwangoda, Namayingo District, 1 Walumbe Fish landing in Mayuge District, 1 Kibuye Fish landing, Nakasongola district, 1 Bugoigo, 1 Nyamunta and 1 at Boma all in Butiaba, Buliisa district.	
8	Install bee hives to scare away elephants	1,435 beehives were procured and distributed: 200 in Kibaale, 174 in Queen	

#	Target FY 2018/19	Progress	Remarks
	from crossing from Protected Areas to communities	Elizabeth, 250 in Kidepo Valley and 811 in Bwindi Conservation Areas. These areas are heavily human elephant conflict.	
9	Eclectic fencing	8 km of the 10 planned km of Electric fence were constructed in Kyambura WR in Queen Elizabeth Conservation Area 1 hippo deterrent demonstration fence covering 0.7 km was constructed on the shores of Lake Kyamwiga in Rubirizi district.	
10	Provide timely management of problem animals	16 problem crocodiles were captured and translocated from various places in the country.	
<b>Management of Wildlife Outside protected areas</b>			
11	Develop a national management plan for wildlife outside Protected Areas	The preparation of the National Plan for management of wildlife outside UWA PAs is ongoing and started with stakeholder consultative engagements. Participation has been focused on participants from districts that still harbor substantial populations of wildlife on public land.	
<b>Wildlife censuses and survey</b>			
12	Conduct a water bird census.	A census of waterfowl in ongoing for Uganda's selected wetlands and water bodies.	
13	Conduct a chimpanzee census in both forested and Savanah PAs	A survey is ongoing for Chimpanzee in Kibale National Park.	
14	Conduct an elephant census in BINP, Katonga WR, KNP, TSWR and MGNP	Animal ground count was undertaken in Karenga Community Wildlife Area and an aerial survey of Kidepo Valley National Park/Karenga Community Wildlife Area to evaluate the impact the Kidepo Critical Landscape Project has had on the entire landscape. Data analysis is ongoing. Aerial Survey of mammals was conducted in Kidepo Valley National Park, Toro-Semliki WR and Katonga WR.	
<b>Protected Area Assessment</b>			
15	Carry out a survey map of all the protected areas for an updated map.  Identify all areas to be gazzetted.  Undertake EIAs	The final Protected Area Assessment report was presented to MTWA Top Management which guided The Ministry Top Management guided that it's implementation be done in a phased approach. The first phase to include upgrade of all those areas in which the District Local Governments have provided District Council Resolutions in support of the upgrades.	

#	Target FY 2018/19	Progress	Remarks
	<b>Wildlife Health Monitoring and Research</b>		
16	Equip the lab in Murchison Falls NP; Procure 7 lab manuals.	A contract was given out for supply a range of laboratory equipment for the laboratory based in Murchison Falls NP	
17	Undertake continuous disease surveillance and monitoring;	<p>Continuous wildlife disease surveillance was done continuously in Protected Areas and the animals were generally healthy throughout the year as there was no outbreak reported or detected save for a few cases of sick/ injured wild animals like the 5 lions which were attended to by vet doctors. These recovered after treatment. Hippo carcasses were recovered in QENP and had died as a result of fighting while a Gorilla silverback died in Bwindi, also due to fights.</p> <p>Over 91 sets of samples (whole blood, plasma, and tissues) were collected from buffaloes for screening of the notifiable diseases.</p> <p>Animals rescued animals from snares including 3 lions &amp; 3 elephants in Kidepo; 1 giraffe in Murchison; 3 cases of chimps in Budongo; 5 elephants, a baby male Chimpanzee &amp; 1 Water buck in Queen Elizabeth NP.</p>	The need for increased disease surveillance and timely intervention has been necessitated by the outbreak of diseases such as ebola in DRC as well as the increased interaction between humans and wildlife due to population pressures around protected areas.
18	Conduct research on the declining wildlife populations in QENP.	A survey about animal numbers in QENP was conducted by Uganda Conservation Fund in September 2018 and the findings shared with UWA.	



Electric Fence constructed in Queen Elizabeth National Park

### ***Conservation awareness and education***

Additionally, UWEC, as a lead Agency for Wildlife conservation education and awareness continued to focus on conservation awareness and education. A total of 365,715 visitors were hosted at UWEC and engaged onsite programs. This was an improvement from the FY 2018/19 where 337,357 were received. UWEC further engaged 3,208 schools and communities through on site and outreach programs.

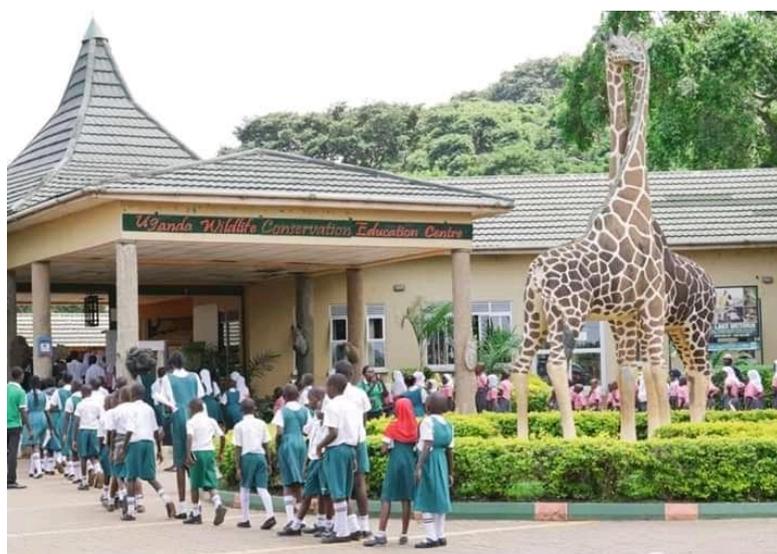
#	Target FY 2018/19	Progress	Remarks
<b>Rescue, rehabilitate and diversify wildlife species at UWEC</b>			
19	Undertake animal rescues	692 rescues/confiscation done (10 Birds, 22 reptiles, 12 mammal, 600 Arachnids.  Response to animal rescues was at 70% from the previous year's 60%.	In addition to animal rescues, 40 community awareness engagements were conducted in animal problems areas within areas of Kampala and neighboring districts.
20	Maintain and conserve 284 individual animals (57 species).	A total of 312 individual animals maintained (60 species) in good health.  12 new species acquired (turkey, kob, rhinoceros viper, Guinea pig, Jameson mama, Oribi, hartebeest Guinea fowl acquired.  A veterinary animal health program was designed and implemented. 38 lab	More animals accommodated due to increased rescues.  Diversified livestock type/animals by 50% for children zoo experience and learning.

#	Target FY 2018/19	Progress	Remarks
		consultation were made. 223 veterinary cases were handled both clinical and preventive, 76 Health checks conducted, hygiene and sanitation protocol developed and followed, 55 individual animals vaccinated, 8 routine vector and pest control sessions conducted with in UWEC premises.	
21	Increase medicinal plant collection by 25%. Establish tree seedling nursery of indigenous.	350 species of medicinal plant sustained and established an indigenous tree seedling nursery.  A total of 300 community members trained in nursery tree seedling management; 1500 tree seedling given to school groups and community within Entebbe	



Inspiring the youth to appreciate wildlife at UWEC

#	Target FY 2018/19	Progress	Remarks
	<b>Conservation education and awareness</b>		
22	Host 355,669 visitors at UWEC and conduct outreaches and onsite conservation Education Programs for schools and communities.	Conservation education programs conducted in schools and other community areas. A total of 3,208 schools were reached out through outreach programs.  365,775 were hosted. This is an increase of 8% over last year's visitation of 337,357 people.	
23	10 Wildlife Clubs activated in Schools to enhance participation of youth/students in wildlife conservation Agenda.	16 school wildlife clubs revived and supported in coordination with other partners.	The wildlife clubs are important in enhancing conservation education and awareness among Ugandans with focus on the youth.
	Celebrate world wildlife day and partner with other government agencies to create awareness on wildlife in Uganda	The sector celebrated the World Wildlife on 3 <sup>rd</sup> March 2019 and the main celebrations took place in Arua Town. The entire week was full of events organized by Sector MDAs and Partners. Included the annual wildlife Marathon, the Conservation Conference, Nakawa Market clean up exercise and the annual wildlife quiz competitions for primary, secondary and tertiary institutions.	The World Wildlife day celebrations are gaining prominence and are becoming a major conservation awareness event.



**Learners entering UWEC-Over 210,000 learners are hosted by UWEC annually.**

While there are increased efforts and funding towards wildlife heritage conservation, the sector is experiencing increasing pressure from the expanding human populations, illegal activities such as poaching or killing outside park boundaries, climate change, as well as habitat destruction.

#### ***4.4 Cultural heritage conservation***

The National Museum and Regional museums of Kabale, Soroti, Fort Lugard and Karamoja (Moroto) together with selected heritage sites of Bweyore, Nyero, Kaping, Mukongoro, Dolwe, Patiko, Barlonyo, Wadalai, Fort Luba and Kakoro were maintained through proper presentation and upgrading of museum galleries, re-demarcation of boundaries, maintaining of archeological trenches and general conservation and curation of artifacts. In particular is the upgrading of the Natural History birds and insects exhibits and ethnographic display of Kabale Museum.

To control encroachment on the cultural heritage sites, community awareness meetings were held in the different parts of the country that resulted into the process of acquiring land titles such as Dolwe Island and its associated 35 rock art site (paintings and Engravings).

Survey, documentation, research (archeological, ethnographical, paleontological, and zoological) and collection to improve and empower the Museums and Monuments Data base was conducted in Mayuge district, Napak and Moroto (Karamoja region) and Northern Uganda in the areas of Agaro, Patiko and Lamoji/Guruguru. As a result, a paper on some of the collected specimen has been published and can be accessed on the MTWA website under geo-pal Uganda Journal. The research also enabled the upgrading of the museums exhibits mentioned above.

School outreaches were conducted in four schools, two in Soroti – Takaramiam Primary School, and two in Karamoja Kotido Secondary School, Moroto Demonstration Primary School to create awareness about cultural heritage in Uganda for posterity. Awareness was also conducted through the annual celebrations of the International Museum Day and, its related activities that are expected to impart attachment and conservation value of cultural heritage to the general public.

#### ***4.5 Skills development and quality assurance of tourism service standards***

In line with the medium term plans of upgrading UHTTI and UWRTI to training centres of excellence, the construction of the training application hotel at UHTTI is underway and the phase 1 is expected to be completed by December 2019. For UWRTI, the feasibility studies are underway for the rehabilitation and expansion of the institute. Efforts are being made to ensure that funding is secured to upgrade these two important training institutions.

##### **4.5.1 Training at Uganda Hotel and Tourism training Institute-Jinja**

A total of 278 new students were enrolled at UHTTI on both Diploma and Certificate courses, 173 female and 105 male in FY 2018/19. This was a great increase given that the target was to enroll only 200 new students.

As a result, the total enrolment of students to pursue various Tourism courses at UHTTI increased to 552 students in 2018/19 from 381 that were enrolled in the year 2015/16. The increase is attributed to increased marketing and advertising campaigns in the media as well as participation in National level exhibitions such as the World Tourism day, World Wildlife day and the National Budget week exhibitions.

Table 11: UHTTI Enrollment, 2015-2019

Year	Certificate (Certificate + Short Course)	Diploma	Total
2015	293	88	381
2016	233	109	342
2017	237	176	413
2018	261	149	410
2019	281	271	552



Source: Uganda Hotel and Tourism Training Institute

In terms of capacity building, 114 students were placed for Industrial training and supervised, 80 female and 34 male at UHTTI and the institute achieved 90% student completion rates after being trained and assessed in both course work and exams and the 10<sup>th</sup> UHTTI graduation ceremony was held in November, 2016.

#### 4.5.2 Graduation at UHTTI -2013-2018

Previously, the Uganda Hotel and Tourism Training Institute (UHTTI) held graduation ceremonies after every two years as shown in the table 12 below but in 2018, the Board resolved to hold graduation ceremonies every year.

In 2018, the number of graduates who pursued various courses at the Uganda Hotel and Tourism Training Institute was 201. This was an improvement from the previous Years. This was largely attributed to an enormous number of those who pursued short courses and certificate courses such as: Pastry and Bakery; front office operations; tour guiding and driving and; front desk techniques that constituted 66 percent of the total graduates in 2018.

Table 12: Uganda Hotel and Tourism training Institute, Graduates, 2013-2018



Year	Certificate (Certificate + Short Course)	Diploma	Total
2013	133	175	308
2015	167	211	378
2017	195	169	364
2018	133	68	201

Source: UHTTI

### 4.5.3 Training at Uganda Wildlife Research and Training Institute - Kasese

For Uganda Wildlife Research and Training Institute (UWRTI) 100 new students were enrolled and 78 graduated in wildlife management courses in FY 2018/19.

Table 13: UWRTI Enrollment (new students) and graduation 2014-2018

Enrolment			
year	Certificate	Diploma	Total
2014	47	75	122
2015	63	50	113
2016	51	44	95
2017	39	74	113
2018	54	46	100

Graduation			
year	Certificate	Diploma	Total
2014	50	68	118
2015	31	77	108
2016	49	77	126
2017	60	69	129
2018	37	41	78

Source: UWRTI

### 4.5.4 Quality Assurance of tourism service standards

**Capacity Building:** 1,613 tourism service providers/stakeholders along the value chain were equipped with skills in minimum quality service and industry standards, standards enforcement, product knowledge, etc. These included; 38 cab drivers, 654 tourism enterprise owners and managers, 321 Public Health Inspectors, tour guides, 600 site guides and driver guides this was done in collaboration with UTA and UHOA.

**Licensing and Registration:** The E-Registration and Licensing System was developed and operationalized to facilitate the online registration and licensing of tourism enterprises. As at 30<sup>th</sup> June 2019, a total of 56 Tour and Travel companies were licensed. With the digitization of the registration and licensing process, applicants will experience more convenience and timeliness in service delivery. In FY 2018/19, 2,066 accommodation facilities were registered and inspected in 30 districts in Northern Uganda (603), 19 districts in Eastern Uganda (578) and in Kampala (424) and Wakiso districts (461). 183 Tour and Travel companies and Travel Agencies were registered as well as 47 Tour Operators and 123 Tour Guides.

On-site spot inspections around the Protected Areas was conducted in 10 National Parks.

**Tourism Case Management:** In a bid to enforce and monitor standards in the sector, a number of operations were undertaken in partnership with law enforcement and respective district officials:

- Closed one tourism accommodation facility in Kapchorwa that was not compliant with minimum quality standards
- Arrested immigration officers that allegedly fleeced money from tourists over tourist visa acquisition at the airport
- Apprehended and prosecuted 2 cases of rogue tour operators who defrauded tourists.

## 4.6 Tourism support infrastructure and product development

Delivering a memorable experience for visitors requires the industry to continue diversifying and expanding tourism products and tourism support infrastructure to match visitor expectations. The visitor expectations keep on changing from time to time and varies across the different categories of visitors.

During the financial year, investment was continued to improve various tourism products and facilities.

Table 14: Progress in implementation of Tourism support infrastructure and product development

#	Target FY 2018/19	Progress	Remarks
1	Renovate the National Museum	The National Museum was renovated including plumbing system, sanitary facilities and the cultural village completed and are currently in use.	More renovations are required-Parking, floor, fencing, upgrade of exhibits. In the medium term, Government intends to refurbish and expand the Uganda Museum to include more galleries, auditorium, fencing, etc.
2	Develop Mugaba Palace as a competitive cultural tourism product-complete fencing of the site	Fencing of Mugaba Palace was done	The development of the site as a key tourism product is phased and will be completed by 2022.
3	Complete and disseminate the Master Plan for the re-development of the Source of the Nile Plan.	The master Plan completed. It includes a Tourism Development Concept; Final 20 year Master Plan; the Implementation plan; as well as the Strategic Environment Analysis (SEA) for the source of the Nile area.	The plan The Master plan will guide all the developments at the sites including both public and private sector investments. Dissemination and implementation to be done starting FY 2019/20.
4	Construct 40 bed tourist accommodation facility in L. Mburo NP	The construction of Rwonyo visitor accommodation block in LMNP is over 80% complete.	
5	Construct modern briefing facilities in BINP and SNP as well as a restaurant at the top of the falls in MFPN.	Briefing facilities constructed at Rushaaga in BINP; Designs for the restaurant at the top of the Murchison falls were completed.	

#	Target FY 2018/19	Progress	Remarks
6	Renovate existing bandas and construct additional 4 bandas for tourist accommodation in KVNP	3 modern bandas constructed while 5 Bandas were renovated in Kidepo Valley NP.	
7	Mt. Rwenzori Tourism infrastructure improved with boardwalks constructed in muddy areas along Kilembe trail at Mutinda 2, Mukongotsa and Kachope.	Boardwalks constructed at Mukongotsa and Kachope. Monument constructed (phase 1) at Margarita peak.	All target infrastructure not done because of inadequate releases (Ushs 280m not released).
8	Trails maintained in protected Areas	A total of 782km of trail network and 80km of bridges were maintained in protected areas. A total of 823m of board walk were upgraded in Semuliki NP.	
9	Improve infrastructure at UWEC: -Water reservoir -Complete 1 <sup>st</sup> floor of the floating restaurant -Construct a new sanitary facility (Toilet) -Repair animal enclosures.	The infrastructure at UWEC (the Entebbe Zoo) was improved with construction of a 260,000 litre capacity water reservoir (tank) to supply water to all animals and other use at UWEC. Completed 1 <sup>st</sup> floor of the floating restaurant with toilets and a kitchen. A new sanitary facility (Toilet) was constructed at UWEC. Tiger Exhibit and holding designed and erected and 4 exhibits repaired at UWEC including Elephant, tiger, leopard and Buffalo. Secure animal exhibits/enclosures are very crucial for accessibility and safety of tourists and workers.	All target infrastructure not done because of inadequate releases (Ushs 100m not released).
10	Develop investment projects on equator points and stop overs.	-Architectural and landscape designs for 6 Equator points developed -Tourism product audits for the Ankole Region undertaken	

The developments are key in improving accessibility, navigability and visitor experience especially during rainy season. This is more important for some categories of visitors such as the aged and the less physically abled.

Continued investment in facilities, infrastructure and attractions that are produced in environmentally responsible ways will be critical in expanding accessibility, inclusiveness, spreading the tourism earnings more widely, and preserving and improving visitor attractions and experiences.

However, while several tourism products and sites have been identified in various locations in the country, these products, facilities and support infrastructure remain under/undeveloped because of limited resources. In FY 2018/19, the Sector MDAs received Ushs 5.47 billion only, yet product development is capital intensive. For instance, the development of the M. Rwenzori Infrastructure alone requires Ushs 70 billion (*excluding the cost of the cable car and ancillary facilities which is estimated at US\$ 40 million*). There is therefore need for a deliberate effort to fund the development of tourism products in this country.

#### 4.7 Development of tourism roads

A total of 65 roads were mapped out as Tourism roads in 2012 with a total length of about 3,900 kms. These are roads that connect the tourism zones including national parks and other tourist attractions.

Visible progress has been made with the construction of 8 roads already completed with total length of 765 kms. The other roads are at various stages of development- civil works are ongoing on 15 roads (about 900kms), Feasibility studies and detailed designs have been completed for 10 roads, awaiting funds for Civil works. Details are presented in the table 15 below.

Additionally, Government has committed to working on at least 200kms of tourism roads annually and Ushs 57 billion was committed to work on additional kms of Tourism roads in the Budget FY 2019/20. Other modes of financing such as contract facilitate financing are being explored to fast-track the development of these roads.

Table 15: Status of Tourism Roads

No	Road Link	Kms	No	Road Link	Kms
<b>Already paved and Completed Civil Works</b>			<b>Civil works are already ongoing</b>		
1	Kamwenge – Fort Portal	65	1	Kyenjojo - Kabwoya	144
2	Fort Portal - Bundibugyo - DRC Border (Lamia)	90	2	Kabwoya – Bulima/Hoima	66
3	Nakapiripirit - Moroto	95	3	Masindi - Paara	92
4	Gulu – Kitgum – Palongo – Lututur( Gulu - Acholibur Section)	170	4	Paraa - Pakwach	54
5	Nebbi – Ajai (Gulu - Arua highway)	50	5	Hoima - Masindi	52
6	Kapchorwa – Okolim – Nakapiripirit (Kapchorwa to Muyembe section)	80	6	Hoima – Biiso - Buliisa– Wanseko	108
7	Soroti - Moroto	170	7	Buliisa - Paraa	30
8	Jinja – Kayunga along River Nile	45	8	Masindi – Biiso – Butiaba Port	68
<b>Designs completed, awaiting funds for Civil works</b>			9	Mbale – Buduuda – Elgon park Boundary – Lwakhakha	60
1	Karenga- Apoka /Sudan Border	40	10	Rukungiri - Kihiki	48.3

No	Road Link	Kms	No	Road Link	Kms
2	Kotido-Moroto	120	11	Palisa – Mukongoro Rock Paintings	30
3	Kotido - Kaabong	68	12	Kihihi – Kanyantorogo section lies along Kanungu - Kihihi	9.2
4	Kabale – Lake Bunyonyi	12	13	Kihihi-Ishasha	11
5	Gayaza (Zirobwe) – Wobulenzi	24	14	Masaka - Bukakata	45
6	(Luku – Kalangala – Lutoboka)	36	15	Mbale – Buduuda – Elgon park Boundary - Lwakhakha	60
7	Luku - Kalangala (along the shores)	66	<b>Procurement of Civil works contract is ongoing</b>		
8	Buwaya – Kasanje - Mpigi	52	1	Kapchorwa – Okolim – Nakapiripirit (Muyembe – Nakapiripirit section)	80
9	Kasanje – Sisa - Kisubi	23			
10	Kitgum-Orom-Karenga	116			

No	Road Link	Kms	No	Road Link	Kms
<b>Feasibility study, detailed engineering design on going</b>			<b>Feasibility Study and Detailed Engineering Design is planned in the medium term subject to availability of funds</b>		
1	Kihihi - Butogota – Buhoma (Kanyantorogo – Butogota (16.5km) and Butogota – Buhoma (15km) sections are part of Buleme – Buhoma – Butogota - Hamayanja – Ifasha – Ikumba road)	31.5	1	Kasese – Nyakalengija	18
2	Kisoro - Mgahinga NP Headquarters	18.3	2	Rukungiri – Kigezi WR – L. Edward Fishing Village	51
3	Kisoro – Nkuringo – Rubuguri – Muko	65	3	Access to the fishing villages: Kasenyi (12km), Hamukungu(17km) Kahendero(20km)	49
4	Kabale - Ruhija - Buhoma	79	4	Access Road to Mweya and Katwe	55
5	Ishasha - Katunguru	88	5	Kamwenge – Dura – Hima	60
6	Kanungu - Hamurwa	60	6	Pakwach – Wankadu – Panyimur	34
7	Arua – Yumbe – Moyo - Dufile	170	7	Pakwach – Ajai- Ocoko	94
8	Namugongo Ring Road	1.8	8	Nebbi – Ajai (Okollo – Inde road (29km).	50
<b>Procurement of Design Consultant is ongoing</b>			9	Soroti – Amuria – Obalanga – Achan Pii	92
1	Kyegegwa - Katonga	74	10	Sironko – Budadiri - Bunasifa	16
2	Karugutu - Ntoroko	49	11	Jinja – Bujagali -Itanda falls	
3	Kyenjojo – Kigarale – Kahunge – Rwamwanja - Kihura	68	12	Mpigi – Kibibi - Mityana	60.4
4	Bisozi – Bihanga – Buremba - Kazo	82			
5	Karenga-Kapedo-Kaabong-	70			
6	Lira – Abim - Kotido	180			
7	Tororo – Buduuda – Elgon park boundary	50			
8	Kumi – Nyero Rock Paintings	8			

#### 4.8 Challenges faced in activity implementation

1. Limited facilities (Class rooms, students' accommodation), tools and equipment especially at UWEC and the training institutions Managing wildlife in areas outside the protected areas ha (UWRTI and UHTTI). Thus is further worsened by inadequate staffing. However, in 2019/20, Government has increased funding to these institutions to improve facilities and operations.
2. Managing wildlife outside protected areas has remained a challenge with more cases of poaching. This has been worsened by population pressure and encroachments on both protected areas and wildlife environments. There is immense pressure for de-gazettement of conservation areas for human settlements in many parts of the country and this has undermined. ***We have enhanced interventions such as boundary surveillance, boundary markings, public sensitizations, and compensations.***
3. Human Wildlife conflict remained a challenge during the year as injuries of community members continued to be registered in different PAs. 22 human death were reported in QENP and MFNP whereas 26 people were injured by problem buffalos, crocodiles, hippos and giant forest hog in QENP alone. There is a need for every PA to have a well-established problem animal unit.
4. Insecurity arising from political instabilities in the neighbouring DRC and Ebola outbreak which partly attributed to the reduction on visitor numbers in some national parks.
5. Multiple licensing frameworks and taxes making tourism business less competitive. These are instituted by the various government agencies and are not borne out of a consultative process and are revenue collection mechanisms and not compliance certifications. These licenses have increased the cost of doing business in the hospitality sector and consequently caused economic distress to the enterprises making the destination uncompetitive.
6. Weak linkages with the lower local governments in management and utilization of wildlife resources. ***The framework for engagement of Local governments and provision of conditional grants is to be prepared in FY 2019/20.***
7. Poor radio communication network in PAs especially the forested parks and mountainous areas has continued to affect both tourism and general park operations in CAs. ***We have engaged NITA-U to improve network coverage in protected areas.***
8. Low levels of product development to keep the tourists much longer and spend more. ***Government continues to increase allocations to the sector to improve tourism products. IN FY 2019/20, funds were approved to improve Kagulu Hills, Source of the Nile, National Museum, Mugaba Palace, Mt. Rwenzori, National Parks, UWEC, among others.***
9. Inadequacies in data management and research. An allocation has been made to ensure collection of vital data on sector performance in FY 2019/20. ***We are at advanced stages to decentralise migration data capture at visitor entry points.***

10. Negative travel advisories, disease outbreaks, insecurity & abductions such as the recent case in Queen Elizabeth National Park). ***We have intensified media engagements to counter the negative communication. There is a combined effort by security agencies to eliminate insecurity incidences in protected areas.***
11. Inadequate budgets to fast-track the development of tourism products, implementation of the quality assurance framework especially with focus of service providers.



## 5.0 PROGRESS ON RECOMMENDATIONS FROM THE 9<sup>TH</sup> TOURISM SECTOR REVIEW

### A) Tourism Marketing and Promotion

#	Issue	Recommended Action	Progress	Responsibility	Rating	Remarks
1.	Limited promotion of Uganda's attractions to conference participants during international conferences held in Uganda	Produce short videos showing Uganda's attractions and present/run them during international conferences	The Tourism videos are available and are played in some conferences and workshops. Some of the videos and presentations can be accessed at <a href="https://goo.gl/7HHMK6">https://goo.gl/7HHMK6</a> .  Sector MDAs have partnered with Media houses to produce and disseminate Tourism Videos e.g the Travel show which is features on a weekly basis on NBS TV.	UTB and UWA		More partnerships for tourism promotion with MDAs will be pursued in FY 2019/20. This will facilitate the distribution of tourism promotional materials and collateral amongst all GOU MDAs.
		Every government meeting and summit should start with a 2minute video on tourism in Uganda	This has started with the conferences/summits hosted by the Tourism Sector.  Tourism promotional videos developed and ready for	All MDAs		

#	Issue	Recommended Action	Progress	Responsibility	Rating	Remarks
			distribution to MDAs			
2.	Negative image of Uganda in the international press	Journalists should be mindful of Uganda's image while reporting news to the outside world	<p>Conducted a media training on responsible tourism with focus on equipping journalists with skills on tourism and destination reporting, enhancing knowledge and understanding of Uganda's tourism sector and their role in crisis management.</p> <p>50 Media Officials (Editors and Senior Reporters) were trained in patriotic journalism and responsible media/crisis reporting.</p> <p>A Media Relations Strategy was developed.</p>	Media		50 media officials (senior editors and reporters) were trained in patriotic journalism and responsible media reporting. Regular media trainings and engagements will be held during FY 2019/20.
3.	Less than 1 million Ugandans visit tourism attractions	Intensify Domestic Tourism awareness	Promotional tourism content and information produced and disseminated through	UTB		In FY 2019/20, domestic tourism awareness will be enhanced

#	Issue	Recommended Action	Progress	Responsibility	Rating	Remarks
			<p>various media channels.</p> <p>Domestic tourism promotion campaigns dubbed 'Tulambule' conducted on a quarterly basis.</p> <p>Resultantly, the number of East African residents visiting the National Parks increased by 15.5% in 2018.</p>			<p>through digital marketing and advertising campaigns, strategic outdoor advertising across Uganda and publicity of tourism events and attractions in partnership with the media houses through travel shows run on TV and radio.</p>

### B) Skills Development and Infrastructure

#	Issue	Recommended Action	Progress	Responsibility	Rating	Remarks
4	Weak capacity in terms of instructional infrastructure, training manpower and the human capital of the trainers in the available	Fast track Jinja School and start organising for the 'software' to run the modern physical training facility after completion	Construction of the application training hotel is ongoing and completion of the 1 <sup>st</sup> phase is expected by	UHTTI		UHTTI will be developed and expanded once more resources are available.

#	Issue	Recommended Action	Progress	Responsibility	Rating	Remarks
	tourism and hospitality training institutions		December 2019.  The management options of the school are under consideration.			
5	Limited level of tourism skills throughout value chain - managerial, technical, and operational and in key supporting functions both in government and private sector.	Need for a thorough skills gap assessment across the entire tourism value chain.  Undertake a Training needs assessment in the sector, taking a value chain approach	A comprehensive skills gap assessment has not been done for the entire tourism sector. However, individual MDAs have conducted skills gap and training needs assessments for their human resources.	UTB, UHTTI, MTWA		
		Develop capacity along the entire value chain – from short tailor-made courses, to full-time training in well-equipped schools, in close collaboration with private sector	Training continues to be done at UWRTI and UHTTI.  During the Financial Year, a total of 1,613	UTB, MTWA		Sector MDAs to collaborate with the private sector to undertake training and improve skills of

#	Issue	Recommended Action	Progress	Responsibility	Rating	Remarks
		Deliver on-job trainings to the stakeholders to address the identified training needs	<p>tourism service providers along the value chain were equipped with skills in minimum quality service and industry standards, standards enforcement, product knowledge.</p> <p>UHTTI developed a number of short course trainings i.e. pastry and bakery, tour guiding, tour operations management and house keeping</p>			all sector players.
6	No coordinated skills development by value chain nodes-	Establish strategic engagements/partnerships with existing public and private training institutions to raise the critical mass needed to fill the skills gap	None	UTB, MTWA		UTB is in the process of establishing a partnership with UHTTI for capacity building

#	Issue	Recommended Action	Progress	Responsibility	Rating	Remarks
						along the tourism value chain
7	Limited investment in skills development of existing workforce by the private sector	Deliberate and strategize engagements with international tourism and hospitality institutions to help Uganda build capacity.	Engagements between UHTTI and the University College of Birmingham have started and are still in infancy stages.  UWRTI signed an MoU with Kent State University to partner in skills development and wildlife research.	UTB, MTWA, UHTTI		

### C) Natural and cultural heritage conservation and promotion

#	Issue	Recommended Action	Progress	Responsibility	Rating	Remarks
8	Access to services such as schools, health facilities for communities surrounding Protected Areas	Maintain tourism revenue benefit to local communities surrounding Protected Areas in order to maintain and increase community social services	The local communities still benefit from the revenue sharing funds and various projects are being supported.	UWA, MTWA(WC)		
9	Presence of Tsetse	UWA to consider the	The proposal from MAAIF	UWA		

#	Issue	Recommended Action	Progress	Responsibility	Rating	Remarks
	infestation in the PAs	proposal from MAAIF	is to spray the tsetse flies. Research is to be undertaken to establish the effect of the proposed action.			
10	Fragmented PAs	Restore/ re-establish wildlife corridors for PAs	A protected area assessment was carried out and completed and the report is ready for implementation which is to be done in a phased approach. The first phase to include upgrade of all those areas in which the District Local Governments have provided District Council Resolutions in support of the upgrades.	UWA, MTWA(WC)		
11	Wildlife outside PAs	Rethink wildlife conservation outside PAs and adopt new thinking for involving communities such as conservancies – best practices from Namibia	UWA undertook consultations and is preparing a National Plan for management of wildlife outside protected areas.	UWA		
		Continued Political	The Government			

#	Issue	Recommended Action	Progress	Responsibility	Rating	Remarks
		support (increased funding for wildlife conservation) and security in tourism areas	has enhanced funding of the sector although the funds for wildlife conservation sub sector largely depend on revenues generated from tourism activities in Protected Areas.			
1 2	Invasive species in PAs	Develop a Zero poaching strategy Harness the power of technology such as sensors in the PAs	The National Strategy on Anti-poaching, Illegal Trade and Trafficking of wildlife and wildlife products is under development and is expected to be finalized by December 2019.	UWA, MTWA(WC)		
1 3	Transnational illegal wildlife trade and trafficking	Wildlife revenue resources be shared, utilized and followed to the latter.	The Wildlife Act 2017 is in existence. Government has enhance surveillance of all entry points to minimize Transnational illegal wildlife trade and trafficking.	UWA, MTWA		

#### D) Cultural Heritage Conservation

#	Issue	Recommended Action	Progress	Responsibility	Rating	Remarks
14	<b>Weak legal framework and infrastructure of the cultural heritage</b>	Update national policies and regulations in response to changing trends	<ul style="list-style-type: none"> <li>•A NEW Museums and monuments policy 2015 in place.</li> <li>•The Historic Monuments Act of 1967 is being revised and Upgraded to a Museums and Monuments Bill. The principles have already been passed by Cabinet and the Bill is before the First Parliamentary Council for drafting.</li> </ul>	MTWA		
		Enhance coordination between the Departments of Museums and Monuments, Culture and Family Affairs and Tourism – preferably under <b>one Ministry of Culture</b>	This matter is still under discussion, a paper to change the name of MTWA is still before Cabinet.	MTWA(DMM)		
		Build the capacity of local governments (Tourism and Culture Officers) to identify, develop and promote cultural	Tourism officers have been recruited in about 35 local Governments. This is a critical step in ensuring that	MTWA(DMM)		

#	Issue	Recommended Action	Progress	Responsibility	Rating	Remarks
		resources for tourism	Tourism sector issues are well represented at Local Government level.			
		Integrate cultural heritage in tourism training (tourism guides, agencies, and university curricular)	UHTTI has introduced the cultural component in their curriculum. At Makerere University in the Faculty of Arts, a course on history and archaeology is being taught.	UTB, MTWA		All trainings undertaken by UTB QA department include product training
		Support existing cultural events e.g. traditional leaders' coronation anniversaries, exhibitions, traditional sports, cultural festivals	The Sector has supported a number of cultural events. Technical as well as financial support.	MTWA		
		Invest in Unique traditional practices – initiation ( <i>imbalu</i> ), naming ( <i>empaako</i> ), Lango initiation ceremony	None	MTWA		This is specifically the mandate of Department of Culture in the Ministry of Gender, Labour and Social Develop

#	Issue	Recommended Action	Progress	Responsibility	Rating	Remarks
						ment (MGLSD).
		Develop home-stays linked to traditional pottery- Nebbi, drum making - Masaka, bark-cloth making Buganda, basketry, fishing -Alur, food processing such as shea butter, traditional medicine Buyijja (PROMETRA), musical instruments (Jinja), pastoralism (ACCA)	This is being done by the Department of Museums and Monuments in conjunction with MGLSD	MTWA		
15	<b>Lack of investment in the unique heritage infrastructure</b>	Protect and develop identified /mapped heritage monuments and sites and publicize their relevance	A total of 750 cultural heritage sites have been identified. Documentation, land title processing, gazettement and development are ongoing processes.	MTWA		
		Support the preservation and promotion of historical buildings in major cities; develop listing mechanisms & guidelines; trails	This has started with streamlining of the policy and guidelines to enhance the preservation of the historic buildings.	MTWA, LGs, UTB, CCFU.		

#	Issue	Recommended Action	Progress	Responsibility	Rating	Remarks
		Provide technical and financial assistance to community museums and cultural centers to enhance their marketability	Technical support is being provided by MTWA.	MTWA		
16	Lack of visibility of cultural heritage internationally and regionally	Support increased inscription of world heritage sites – natural and cultural	The Ministry is working towards the serial nomination of rock art sites in the Lake Victoria Basin together with Kenya and Tanzania.	MTWA		

#### E) Cross Cutting issues

#	Issue	Recommended Action	Progress	Responsibility	Rating	Remarks
17	Lack of harmonization of tourism statistics from various sources.  Inconsistent tourism or visitor statistics.	Invest in research for the tourism sector. Develop a robust information management system on visitor statistics which should be updated regularly.	Systems have been set up to decentralize data capture of inbound tourist at entry points to ensure accurate and timely data.  The assessment of the Tourism Management Information System was done and the system is to be developed.	MTWA		

#	Issue	Recommended Action	Progress	Responsibility	Rating	Remarks
18	Inadequate funding for the sector constrains sector growth	Budget release for tourism sector should be increased up to 5% (which is the ideal required)	Funding for the Sector from the Consolidated Fund was increased by Ushs 15 billion in FY 2019/20. The revenues generated and used at source by sector MDAs have also increased.	MTWA		
19	Reporting on sector achievement of SDGs	In future, there is need to report on how the sector is achieving the SDGs	UBOS, MoFPED and OPM are coordinating the reports on SDGs performance with MTWA providing updates on the SDGs we respond to	MTWA		
20	Security and safety in tourism and wildlife areas	There is need to put emergency response programs in tourism sites and security such as Helicopter pick up (a priority in UWA FY 2019/2020)	A joint Tourism Security Committee composed of the private and private sector and Chaired by the Commandant Tourism Policy, has been set up.  UWA capacity has been enhance	UWA		

#	Issue	Recommended Action	Progress	Responsibility	Rating	Remarks
			by more rangers, vehicles and there are plans to acquire a helicopter and drones in FY 2019/20 to ensure timely interventions			
		We need better branding of Uganda for tourism purposes	Procurement of an agency to develop the Brand is ongoing.	UTB		
2 1	Cost of finance for the Private sector to invest in this sector is expensive	To create training levy from accommodation facilities through an Act of Parliament	Government has provided several lines of credit e.g under UDB to provide cheaper credit to the private sector.	MTWA, UTB		
2 2	Training of the sector trainers	Scholarships for the trainers in better placed hospitality centres should be secured to improve on hospitality industry quality from experience and practice	There are exchange programmes with international hospitality training institutions.	MTWA		
2 3	Involve the young people in tourism sector	The MTWA should work with MOES to inculcate tourism issues in the young and also put up a policy that	Engagements are still ongoing with MOES.	MTWA		

#	Issue	Recommended Action	Progress	Responsibility	Rating	Remarks
		encourages schools to have compulsory tourism directed tours within the country				



## 6.2.2 Planned Outputs for the Sector, FY 2019/20

Many initiatives have been identified and funds appropriated for their implementation as presented below under the various key results areas.

### 1. **Policies, regulations and governance**

- a) Museums and Monuments Bill submitted to Parliament
- b) Principles for the Tourism Bill submitted to Cabinet.
- c) The sector will enhance inspections and oversight of wildlife use rights holders, tourism facilities and services, and protected areas for compliance; continue strengthening the management of affiliated institutions and increased oversight role for the entire Tourism Sector.
- d) Uganda Wildlife Act and the Uganda Wildlife Policy Implementation Plan will be published and disseminated; The National Grey Crowned Crane Action Plan published and formulation of Wildlife Compensation Regulations and Revenue Sharing Regulations will be prioritized.
- e) The Sector will formulate, print and disseminate the Farming and Ranching Guidelines, Community Conservation Policy, Human-Wildlife Conflict Management Strategy and Revenue Sharing Guidelines.
- f) Sector MDAs will participate in various global conservation engagements to secure the country's interests in the global conservation agenda.
- g) Performance measurement of the Tourism Sector will be enhanced by decentralization of immigration data capture at entry points to ensure timely immigration statistics, collection of vital data on domestic tourism, accommodation facilities and other variables in the Sector. The operationalization of the Tourism Information Management System (TIMS) will be given priority.

### 2. **Conservation and Sustainable Utilization of Wildlife Resources**

#### ***Resource Conservation & management***

- a) Mark the boundaries of Bokora-Matheniko *Wildlife* Reserve (400 pillars), Murchison Falls NP (200 pillars), Mt. Elgon National Park (530 pillars), Queen Elizabeth Conservation Area (100 pillars).
- b) Conduct 14,892 ground patrols and 48 aerial patrols and cross boundary engagements with Kenya, Rwanda and Congo.
- c) Undertake disease surveillance and health monitoring activities in Protected Areas (PAs); procure veterinary drugs and equipment and complete the bio-security lab in Queen Elizabeth and Murchison Falls National Parks.
- d) Prepare sensitivity atlas for Semliki National Park; fire management plans for 5 PAs; General Management Plans for Ajai Wildlife Reserve (WR) and Mt. Elgon NP and undertake mapping and inventory of invasive species in at least 4 PAs.
- e) Carry out compliance monitoring visits on impacts for developments such as oil and gas, hydropower, water supply projects in the PAs

- f) Support community based anti-poaching activities and compensate at least 8 problem animal cases and undertake compensation for the Degeya community of Ajai and Rwakobo.
- g) Procure one helicopter, 1.5 set of road equipment, and two drones.
- h) Establish a new Rhino sanctuary, 25 ranger blocks for staff accommodation.
- i) Undertake translocation for the Uganda Kob, the giraffe and the Rhinos.

***Wildlife conservation education and awareness***

- a) Support 35 Community Livelihood projects around selected protected areas and undertake consultations on Community Livelihood Fund Guidelines
- b) Construct 60km of electric fence, 30kms of new elephant trenches, maintain 265kms of old elephant trenches
- c) Conduct 8 capacity building workshops for District Local Government vermin officers as well as human wildlife conflict resolution meetings for Political and Civil leaders
- d) Participate in 12 radio talk and 12 Television shows, and develop and distribute 5,000 education, information and communication materials, develop and produce 4 documentaries and news features
- e) Organize and hold the World Wildlife Day 2020 and mobilise schools for wildlife education and awareness
- f) The Sector will continue to undertake animal rescues, outreaches and onsite conservation Education Programs for schools and communities. Countrywide awareness on conservation of Uganda's heritage resources will be up scaled.

***Research and Ecological monitoring***

- a) Conduct surveys in the protected areas of Murchison Falls, Kidepo Valley, Toro –Semliki WR, Aswa-Lolim, Lake Mburo and Rwenzori Mountains.
- b) Undertake research on impact of crocodile egg collection on their ecology
- c) Remove invasive species in PAs (600ha in Lake Mburo, 633ha in Queen Elizabeth, 50ha in KWR, 50ha in Kidepo Valley, and 200ha in Toro –Semliki).
- d) Organize 1 national ecological research symposium to share research findings & identify new research areas and establish a research fund to support 4 researchers to undertake research on key thematic areas.
- e) Finalize feasibility studies for the expansion of Uganda Wildlife Research Training Institute (UWRTI) to undertake high quality research to better inform wildlife conservation and policy formulation.

**3. Cultural Heritage Conservation**

- a) Maintenance of museums, cultural heritage sites and conservation of artifacts will be prioritized including Kabale, Moroto, Wedelai, Barlonyo Kumi, Patiko, Nyero and Dolwe rock site, Soroti and Uganda Museum.
- b) Renovation of National Museum and Mugaba Palace will be continued to improve the competitiveness of these important tourism products. The facilities are key in demonstration of the importance of preservation of cultural heritage resources as well heritage conservation education among students and all Ugandans.

- c) Secure 15 land titles for Kayabwe Equator, Nakaima, Bukwa, Nyabusosi, Napak, Moroto, Kafir, Kasonko, Mpumudde, Kigezi site, Fort Luba, Mutanmda caves, Lyingo landing site, Lamogi rebellion, Lotuturu, Gururu and Buvuma Island.
- d) Opening boundaries and mark sites of Bigo byamugenyi, Nakayima cultural heritage sites with visible pegs and finalise their management plans.
- e) Undertake repair of Presidential cars, curation of exhibits in museums and conduct ethnographic research on museum collections from Kabale Museum and story-line. Rehabilitate and Maintain monuments (Mass graves) of Nansana and Wakiso.
- f) Cultural heritage conservation awareness through school outreaches and celebration of International Museum Day.
- g) Complete nomination Dossier for Kibiro salt village and document and classify historical sites in Northern, Eastern and West Nile.

#### 4. **Tourism Promotion and Marketing**

UTB will lead other sector players to promote Uganda's tourist attractions and reach out to more domestic and potential international tourists through;

- i. Participation in international tourism marketing exhibitions and regional marketing events to consolidate the gains so far realized in promoting destination Uganda.
- ii. Hire 7 Market Destination Representation (MDR) firms to aggressively promote destination Uganda in the International, African and Domestic Markets
- iii. Implementation of interventions to promote MICE in Uganda.
- iv. Undertake Friend a Gorilla campaign to increase awareness on Gorillas and e-marketing digital campaigns
- v. Organize Fam trips for tourism stakeholders (public & private sector), international influencers and tour operators and guests to improve product knowledge and raise awareness/publicity.
- vi. Launch new Pearl of Africa Brand in all source markets.
- vii. Undertake 360 destination advertising and marketing (digital and outdoor) in all source markets
- viii. Promote domestic tourism through campaigns (such as *tulambule*, events cultural, iconic & national, popular leisure events, sports, expatriate events, etc.) and Fam trips for local celebrities, influencers, journalists, etc.
- ix. Produce publications and collateral (promotional videos, posters, folders, bags, key holders, etc.) for distribution at events held in the international, regional and domestic markets.
- x. Develop new and upgrade existing tourism products in collaboration with regional tourism clusters.
- xi. Engage the media through trainings on matters of promoting positive perception through responsible reporting of crisis events in a bid to implement the developed crisis management strategy.

## **5. Tourism Infrastructure and Product Development**

In the FY 2019/20, the Sector will focus on the following;

- a) Development of Source of the Nile infrastructure including; Construction of a modern gate and revenue collection office at the source of the Nile; 50 solar security lights, a 500 metre marine walk-way, state of the art monument and five (5) Source of the Nile directional and informational signage.
- b) Construct visitor accommodation facilities including 10 self-contained blocks in Murchison Falls and Kidepo Valley NPs, a 10-bed apartment and 10 tents in L. Mbuho NP as well as 2 bandas in Suam.
- c) Design and construct the equator monument in Queen Elizabeth National Park; construct a restaurant at the top of the falls in Murchison Falls; complete and furnish the Visitor Information Centre at Sheraton.
- d) Construct trails linking Muhabura, Mgahinga and Sabinyo; and construct ladders at Mudange cliff.
- e) Organize forum for concessionaires and review 10 concessions terms.
- f) Procure new transmission system for the ferry, remodel 3 old boats and procure two game drive vehicles.
- g) Construct 5 flush toilets and undertake design for 6<sup>th</sup> street, top of the falls restaurant and canopy walk.
- h) Continue to improve facilities along the trails of Mt Rwenzori including construction of Board walks at Bukurungu East 1 (200 meters), Bukurungu East 2 (200 meters) and Bukurungu West lower (100 meters; resting points at Yerya resting camp, Green lake Camp and Kasanzi resting camp; water flush toilets at Yerya resting camp, Green lake Camp and Kasanzi resting camp and construction of a 300 metre climbing ladder at Mughule Pass along the Bukurungu trail.
- i) Complete the construction of the floating restaurant at UWEC. The completion of the restaurant is important for financial sustainability of UWEC, improvement of visitor experience/comfort, and creation of more employment opportunities for Ugandans.
- j) Designing and erecting of 3 new animal enclosures/exhibits to ensure improved security of tourist, animal keepers and animals and renovation of the animal hospital at UWEC.
- k) Developing a National Tourism Product Development, Diversification and Tourism Investment Strategy to serve as a guiding framework in managing the destination's tourism investment and product development initiatives in order to match the needs of existing and new markets.
- l) Rehabilitate and expand the Tourism sites of Kagulu hills, Equator in Kayabwe, Bishop James Hannington and Kitagata Hotsprings with focus on information centers, toilets, signage (information & directional), trails, monuments and documentation. Site lay out plans produced.
- m) Develop Tourism Product portfolio for Karamoja and Northern Regions of Uganda showcasing existing products, their performance and potential products for development

## **Capacity Building, Tourist Service Standards and Quality Assurance**

Enroll 200 and 140 new students at Uganda Hotel and Tourism Training Institute (UHTTI) and Uganda Wildlife Research and Training Institute (UWRTI) respectively.

Support to 13 tourism Clusters (EETN, Busoga, Buganda, Ankole, Kigezi, Tooro, Bunyoro, Ssesse, Acholi, Lango, Karamoja, Teso, West Nile, and Rwenzori) in areas of tourism promotion and marketing, product development and quality assurance.

Staff training for Sector MDAs in areas of occupational health safety, ranger training in command & control, arms handling management, Wildlife crime intelligence, investigations, Wildlife management, governance & leadership, and other professional trainings.

Undertake registration, licensing and inspection of tourism enterprises in all regions of Uganda.

Build capacity along the entire value chain in minimum quality standards, customer care, product knowledge, inspection, etc.

Undertake training of hotel assessors in all regions of Uganda.

Develop an automated classification tool/system to improve efficiency and coordination of the grading and classification function

## ANNEXES

**Table 18: Annual Tourist Arrivals by Purpose of Visit, 2013-2018**

Purpose of Visit	Year						%Age Share 2018	%Age Change 2018-2017
	2013	2014	2015	2016	2017	2018		
Leisure and Holiday	187,824	220,219	207,831	237,312	281,192	311,335	20.7%	10.7%
Business and conferences	296,087	282,594	321,988	289,932	402,675	432,070	28.7%	7.3%
Visiting friends and relatives	527,939	440,928	453,445	498,745	492,246	523,749	34.8%	6.4%
Others	194,483	322,305	319,539	296,534	226,296	238,515	15.8%	5.4%
<b>Total</b>	<b>1,206,334</b>	<b>1,266,046</b>	<b>1,302,802</b>	<b>1,322,522</b>	<b>1,402,409</b>	<b>1,505,669</b>	<b>100%</b>	<b>7.4%</b>

**Table 19: Annual Tourist Arrivals by Region of Residence, 2013-2018**

Region	Year						%Age Share 2018	%Age Change 2018-2017
	2013	2014	2015	2016	2017	2018		
Africa	935,983	988,641	1,046,968	1,047,013	1,127,946	1,199,636	79.7%	6.4%
America	73,075	76,616	61,598	71,083	77,852	85,014	5.6%	9.2%
Asia	66,814	70,002	66,133	73,005	71,169	78,452	5.2%	10.2%
Europe	97,571	110,476	106,699	110,391	104,537	118,922	7.9%	13.8%
Middle East	10,424	10,525	13,391	13,668	13,395	14,691	1.0%	9.7%
Oceania	10,421	8,256	6,169	6,342	6,778	7,903	0.5%	16.6%
Others & Not stated	12,046	1,530	1,844	1,020	732	1,051	0.1%	43.6%
<b>Total</b>	<b>1,206,334</b>	<b>1,266,046</b>	<b>1,302,802</b>	<b>1,322,522</b>	<b>1,402,409</b>	<b>1,505,669</b>	<b>100%</b>	<b>7.4%</b>

**Table 20: Annual Tourist Arrivals by Mode of Travel, 2014-2018**

Mode of Travel	Year					%Age Share 2018	%Age Change 2018-2017
	2014	2015	2016	2017	2018		
AIR	443,480	402,207	432,282	420,857	463,982	30.8%	10.2%
LAND	822,566	900,595	890,240	981,552	1,041,687	69.2%	6.1%
<b>TOTAL</b>	<b>1,266,046</b>	<b>1,302,802</b>	<b>1,322,522</b>	<b>1,402,409</b>	<b>1,505,669</b>	<b>100%</b>	<b>7.4%</b>

**Table 21: Visitations to National Parks by Category, 2014-2018**

Category of Visitors	Year					%Share 2018	Change 2018-2017	%Change 2018-2017
	2014	2015	2016	2017	2018			
Foreign Non Residents	89,402	77,206	95,949	123,237	150,931	46.4%	27,694	22.5%
East African Residents	49,480	54,770	62,142	78,684	90,914	27.9%	12,230	15.5%
Students	45,774	65,074	70,299	66,463	68,281	21.0%	1,818	2.7%
Foreign Residents	15,354	14,775	15,778	14,711	14,038	4.3%	(673)	-4.6%
Others (Transit,VIPS/UWA)	2,875	3,733	1,557	2,576	1,181	0.4%	(1,395)	-54.2%
<b>Grand Total</b>	<b>202,885</b>	<b>215,558</b>	<b>245,725</b>	<b>285,671</b>	<b>325,345</b>	<b>100%</b>	<b>39,674</b>	<b>13.9%</b>

Table 22: Visitation to National Parks by National Park, 2014-2018

National Park Visited						%Share	Change	%Change
	2014	2015	2016	2017	2018	2018	2018-2017	2018-2017
Murchison Falls National park	66,844	65,366	75,360	93,256	102,305	31.4%	9,049	9.7%
Queen Elizabeth National Park	58,769	72,964	85,905	81,660	86,875	26.7%	5,215	6.4%
Bwindi Impenetrable National Park	20,611	16,476	19,522	26,576	37,514	11.5%	10,938	41.2%
Lake Mburo National Park	26,980	24,979	26,012	30,403	35,206	10.8%	4,803	15.8%
Kibale National Park	12,097	10,463	11,760	15,728	18,843	5.8%	3,115	19.8%
Semiliki National Park	4,824	10,389	8,214	12,850	16,628	5.1%	3,778	29.4%
Kidepo Valley National Park	4,091	5,663	7,824	11,018	12,056	3.7%	1,038	9.4%
Mgahinga National Park	3,033	2,648	3,840	5,505	6,781	2.1%	1,276	23.2%
Rwenzori Mountain National Park	2,758	3,343	3,192	3,633	5,146	1.6%	1,513	41.6%
Mt. Elgon National Park	2,314	2,669	3,335	4,391	3,405	1.0%	(986)	-22.5%
Toro Semliki National Park	564	598	761	651	586	0.2%	(65)	-10.0%
<b>Grand Total</b>	<b>202,885</b>	<b>215,558</b>	<b>245,725</b>	<b>285,671</b>	<b>325,345</b>	<b>100%</b>	<b>39,674</b>	<b>13.9%</b>

Table 23: Visitation to National Parks by National Park and Category of Visitors, 2018

National Park Visited	Category of Visitors					Total	%Share 2018
	East African Residents	Foreign Non Residents	Foreign Residents	Students	Others (Transit, VI PS/UWA)		
Murchison Falls National park	37,234	42,784	6,921	14,370	996	102,305	31.4%
Queen Elizabeth National Park	25,000	30,174	2,442	29,259	-	86,875	26.7%
Bwindi Impenetrable National Park	1,243	35,743	501	22	5	37,514	11.5%
Lake Mburo National Park	11,774	14,085	1,725	7,622	-	35,206	10.8%
Kibale National Park	552	17,503	275	513	-	18,843	5.8%
Semiliki National Park	4,627	617	174	11,210	-	16,628	5.1%
Kidepo Valley National Park	7,058	3,134	953	762	149	12,056	3.7%
Mgahinga National Park	627	4,626	398	1,104	26	6,781	2.1%
Rwenzori Mountain National Park	728	1,599	357	2,462	-	5,146	1.6%
Mt. Elgon National Park	1,944	383	238	840	-	3,405	1.0%
Toro Semliki National Park	127	283	54	117	5	586	0.2%
<b>Grand Total</b>	<b>90,914</b>	<b>150,931</b>	<b>14,038</b>	<b>68,281</b>	<b>1,181</b>	<b>325,345</b>	<b>100%</b>



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