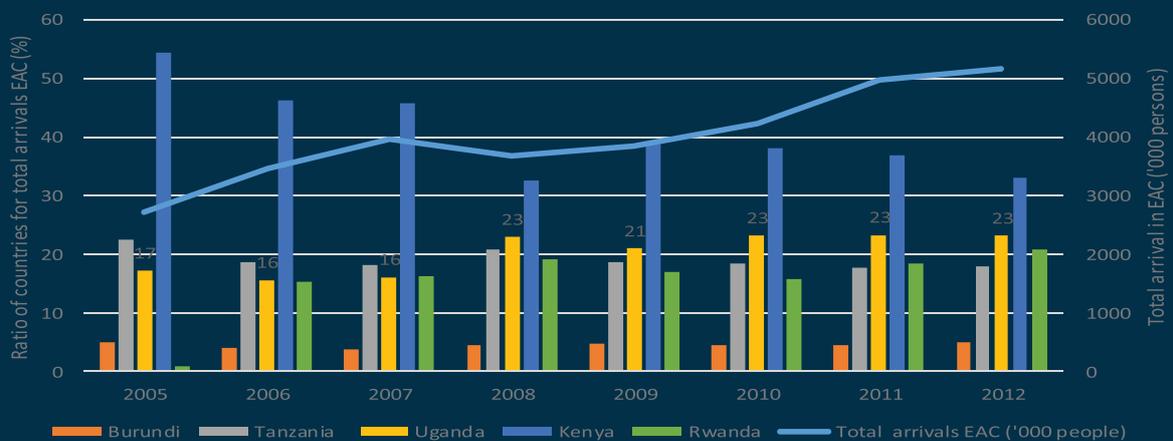


A COMPARATIVE ANALYSIS OF THE TOURISM SECTORS IN THE EAST AFRICAN COMMUNITY: THE WAY FORWARD FOR UGANDA

EAC Tourism arrivals and ratio of total arrivals for different countries



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ABSTRACT

The paper makes a comparative analysis of the tourism sectors in the EAC with a view to improve the sector in Uganda to exploit the existing potential. The study seeks to answer the following question: What are the impediments to the sector and what should be done to achieve full potential? The study adopts three approaches to conduct the study: desk review, key informants interviews and secondary data analysis. Results suggest that in comparison to the rest of the EAC partner states, specifically Kenya and Tanzania, Uganda invests less in the sector, realizes less income, spends less on marketing, has relatively higher inadequacies in infrastructure facilities and attracts smaller number of visitors. The sector situation analysis reveals that although a lot of effort has been put in the sector in the last decade, more is required to make it more competitive regionally. It is recommended that more resources are invested both by the public and private sectors, the sector management is extended fully to district level, a tourism information data and management system is put in place, product development is prioritized, requisite infrastructure are developed and the human resource subsector is reformed to match with the sector demands.

1.0 INTRODUCTION

With abundant resources and a lot of tourism attraction potential, Uganda still lags behind some of the East African (EAC) countries, specifically Kenya and Tanzania in attracting tourism and consequently realising comparatively less revenue from the sector. Uganda is endowed with various tourism attractions including diverse nature based, faith based, culture and heritage, eco-tourism attractions. The main potential lies in nature based tourism where there is variety of flora and fauna and beautiful sceneries. This presents the country with numerous tourism opportunities to stimulate economic growth and earning significant revenues from strengthening primary, secondary and tertiary tourism industries. Uganda's tourism sector holds a huge potential for sustainable growth and development but is currently characterized by inadequacies to initiate meaningful tourism development.

In spite of the challenges, tourism has grown fivefold over the last decade with improved security in the northern part of the country. On the one hand, the World Travel and Tourism Council (WTTC 2013) estimates that the Uganda tourism industry directly contributed 225,300 jobs in 2011, with the figure rising to a total of 522,700 jobs when factoring in those indirectly supported by the industry representing 3.4 percent and 7.9 percent of the Uganda workforce respectively. On the other hand the Vision 2040 (Republic of Uganda 2013) estimated that by 2011 tourism contributed 14.6 percent (direct and indirect) of total employment (630,830 jobs) and the sector contributed to 23 percent of the total registered businesses (hotels restaurants, recreational and personal services) in the country. On the basis of WTTC forecasts, it is estimated that by 2023 some 588,300 persons will be directly employed in the tourism sector.

Compared to neighbouring countries, especially Tanzania and Kenya, tourism is still a developing sector in Uganda. According to statistics from the WTTC, the direct impact of tourism expenditures in Uganda amounted to 3.7 percent of gross domestic product (GDP) in 2012, which can be compared to 3.3 percent of Rwanda's GDP, 5 percent of GDP in Tanzania, and 5.7 percent in Kenya (Table 1).

Table 1: Tourist Arrivals and Direct Contribution to GDP

	International tourist arrivals, 2010	Direct contribution to GDP, 2012 (%)
Kenya	1,470,000	5.7
Rwanda	619,000	3.3
Tanzania	754,000	5.0
Uganda	946,000	3.7

Sources: Arrivals—UN World Tourism Organization, *Tourism Highlights, 2012 Edition*; GDP—World Travel and Tourism Council, *Travel and Tourism Economic Impact 2013*.

Tourism's direct contribution to GDP in 2011 was estimated at US\$800 million representing 4 percent of total Ugandan GDP. Incorporating both indirect and induced impacts contributed to GDP, US\$1.7 billion in 2011 which was an equivalent of 9 percent of total Ugandan GDP. Corresponding statistics for Rwanda, Kenya, and Tanzania were 8.4 percent, 13.7 percent, and 13.3 percent respectively. Uganda is underperforming as Kenya and Tanzania generated US\$4.5 billion and US\$3.4 billion from tourism respectively (WTTC 2013). This implies Uganda can perform better given its potential compared to some of the neighbours.

To be able to drive the sector to its full potential requires a departure from the traditional way the sector has been financed, managed and facilitated. This will entail a critical assessment of the sector in addition to the work done by the World Bank (2012; 2013) which highlight the current challenges although the reports lack the depth required. In summary, although there is progress, many challenges remain, which require strong government leadership to develop the sector in collaboration with other stakeholders. The reports point to areas that need further research which this study partly addresses, among others - how to develop the sector to its reasonable potential.

There is inadequate presence of tourism experts at the sub-national level. Specifically there are no tourism officers at the local government level implying that tourism needs to be mainstreamed into government structure at this level. Although a number of institutions

that promote tourism in Uganda exist, they lack a coordination mechanism to perform this task¹. Within this large structure, there are likely to be some overlap of tasks, particularly in areas such as marketing, training and research. There is insufficient benefits for communities around conservation areas to prompt adequate conservation. Uganda's annual tourism marketing budget is one of the smallest in the region. Whereas Uganda invested around US\$ 0.3million² in tourism in financial year 2014/15, Kenya's is US\$23 million, Tanzania's US\$10 million, and Rwanda's is US\$5 million. This is a demonstration of the level of financial commitment by Uganda in promoting tourism. Infrastructure provides the backbone for a country's tourism development efforts. It is critical for providing tourists with access to tourism sites and the basic services they need during their visit. Consequently, investment is hard to attract if adequate infrastructure is not in place. Despite recent investments in infrastructure development by Government, there are still significant infrastructure gaps. Air transport infrastructure to tourist sites is still limited. There is inadequate electricity and Information Communication Technology (ICT) coverage, especially to some of the more remote tourism destinations. Roads connecting to more rural and remote tourist sites are seasonal and therefore impassable during the rainy season.

The tourism sector is one of the prioritized as growth sector in the second National Development Plan (NDPII). In the Budget Speech (MFPED 2014) for the 2014/15 budget, the Minister of Finance Planning and Economic Development acknowledged the significant potential that tourism can contribute to national output. However, the Minister conceded that government has not formulated a comprehensive Tourism Sector Strategy that will address issues of promotion, training and infrastructure development. This paper poses the following questions: What should Uganda do differently to make the sector realize its potential? What has been the budgetary allocations to the sector? What are

the impediments to the sector to achievement of full potential?

This paper therefore seeks to contribute to the promotion of the tourism sector in Uganda through provision of the necessary information for strategic policy direction and implementation.

The rest of the paper is structured as follows: Section 2 presents a situation analysis of the sector. A critical review of the relevant literature is discussed in section 3. Section 4 presents the study approach and discussion of the findings is the subject of section 5. Section 6 presents a way forward.

2. SITUATION ANALYSIS OF THE UGANDA TOURISM SECTOR

2.1 Management and planning

According to the Vision 2040 (Republic of Uganda 2013) the tourism sector in Uganda has three major sub-sectors, namely; tourism development, wildlife conservation, and museums and monuments. The sector heavily relies on traditional nature-based tourism products centred on distinct geographical areas. Its potential has not been fully realized and exploited due to a number of factors.

With regard to the management of the sector, the Ministry of Tourism, Wildlife and Antiquities (MoTWA) has the overall mandate to oversee, monitor and coordinate the tourism sector with the assistance of various departments and implementing agencies that perform different mandates towards the development of tourism. Whereas the Uganda Tourism Board (UTB) is mandated to market tourism, Uganda Wildlife Authority (UWA) conserves wildlife; Uganda Wildlife Education Centre (UWEC) promotes environmental education; Uganda Wildlife Training Institute trains wildlife conservation; and, the Hotel and Tourism Training Institute (HTTI) trains in tourism and hospitality. In the execution of their respective mandates, the MoTWA and agencies are characterized by limited funding, inadequate staffing and there is lack of clarity between the roles of some departments and the implementing agencies. For example, UWA sometimes

¹ In addition to Ministry of Tourism, Wildlife, and Antiquities' three departments (Tourism Development, Wildlife Conservation), and Museums and Monuments and various units, the ministry encompasses six other bodies: Uganda Wildlife Authority (UWA), Uganda Tourist Board (UTB), Hotel and Tourism Training Institute (HTTI), Uganda Wildlife Training Institute (UWTI), Uganda Wildlife Education Centre (UWEC), and Ngamba Island Chimpanzee Sanctuary

² Uganda's annual tourism marketing budget is one of the smallest in the region with allocations to Uganda Tourism Board (UTB) for 2014/15 as UGX 5 billion.

does marketing which is the mandate of UTB. Under the decentralization framework (Local Government Act 1997), local governments have powers to make local policies, regulations and formulate development plans. It is observed that there is still limited integration of tourism planning and management in the local government structures. Mainstreaming the activities of tourism at the local government level is still a challenge. While some districts and urban authorities are increasingly giving specific attention to the tourism sector by employing tourism officers and including tourism in the development plans, others have not.

Uganda is a private sector led economy which implies that private sector involvement especially in providing tourism services is critical. The tourism private sector has its apex organization called Uganda Tourism Association (UTA) which collaborates with Non-for-profit community tourism associations such as Uganda Community Tourism Association (UCOTA) and Community-based Tourism Initiative (COBATI). UTA is playing a major role increasingly in steering the private sector to contribute to the development of tourism in Uganda. Nevertheless, the operations of the private sector trade associations are constrained by inadequate monitoring and regulation of their members, limited lobbying capacity, inadequate staff training, and unregulated players who operate outside the discipline and authority of the trade associations (MoTWA 2014). For the UTA to effectively lead the private sector in making a significant contribution, there is need to improve their capacity to organize and participate.

2.2 Tourism Marketing

The institution mandated to market tourism both internally and externally is the UTB whose functions are to formulate and implement an international marketing strategy; encourage and promote domestic tourism within the country; and, encourage investment in the tourism sector, among others. Owing to funding challenges this has not been fully realised. This has resulted into a weak destination image for Uganda and incapacity to undertake marketing research to make informed decisions. Uganda tourism brand is weak, lacks a clear identity and is barely recognized globally. Within the country, there is inadequate signage to guide visitors to and around tourist attractions. Owing

to the limited travel/tourist maps, potential tourist are lost. Uganda has not organized efficient online booking and payment facilities to boost the numbers of tourist. Although Uganda has been able to transform after the years of dictatorship and conflict in the northern and western part of the country, across the world there remains elements that judge Uganda from the past negatively impacting on attraction of tourist. The bottom line is that a good strategy is required and funds must be availed to realize the objective of marketing the country, especially externally.

2.3 Infrastructure

The state and quality of public infrastructure development plays a leading role in determining the level private investment into the sector and tourist attraction. The success of any tourism destination is dependent to a large degree, on the nature of the facilities and infrastructure services that are available to the tourists (UNECA: 2013). These may constitute: primary tourist facilities and services such as hotels, restaurants, and travel and tour services; secondary tourist facilities and services such as shopping, recreation, entertainment and visitor information services, and tertiary tourist facilities and services such as health services and care, emergency and safety services, financial services and personal services. There is lack of stop over centres along the major highways of Uganda and a total absence of good and clean resting places along the highways. The quality and quantity of tourism infrastructure is still inadequate in most parts of the country especially in the rural areas, in spite of a number of programmes to improve on the available infrastructure stock (MoTWA 2014). In Uganda air transport infrastructure, which facilitates access to destinations is not well developed, making travel expensive. Air transport is still under developed where out of the approximately 60 licensed airfields, 30 are currently in use and Entebbe remains the only International Airport and key entry point for tourists. Roads are the major means of transport used in Uganda to provide vital linkages between major tourism areas. The condition of the roads in protected areas are sometimes not passable during rainy seasons when most roads deteriorate. Directional signage and rest stops (with clean toilets, food and beverage outlets) are generally lacking on most roads. Prevailing road conditions, densities and

networks within the country are of poor quality and mostly inadequate with the exception of city centres and urban areas. Although some major roads to key towns in tourist areas in the southern and western parts Uganda are paved, there is a general lack of a comprehensive, integrated and continuous paved road network across the country. The Uganda passenger railway service ceased and has been defunct since 1998. Through the East African Regional initiatives, there are currently plans to refurbish the existing narrow gauge tracks in Uganda and to construct a new standard gauge line, connecting Kenya to Rwanda, Southern Sudan and Congo via Uganda. There are still limited water transport facilities despite abundant water resources in the country.

In the current electronic era, information and Communication Technology (ICT) is increasingly becoming important in distribution and promotion of tourism products globally. Mobile phone coverage in Uganda is in most parts of the country, although there are blind spots where there is no signal. In remote areas, there is inadequate ICT network coverage and internet availability is still very poor. The good news is that the National Information Technology Authority Uganda (NITA-U) is currently implementing a backbone infrastructure comprising lying optical fibre cables linking to most district centres which will improve the situation. There are other efforts at regional level for example, the East African Submarine Cable System Project and the South East Asia-Middle East-West Europe.

Uganda still heavily relies on biomass for energy generation with a very small per capita electricity utilization. Out of the 10 National Parks, only five have direct access to the national grid (MoTWA 2014). This implies that tourism destinations which are not connected to the grid have to generate their own supplies from a mix of solar power and generators, making it quite costly and non-attractive. Furthermore, tourism establishments that are in areas not serviced with piped water especially in rural areas incur extra costs to either build water harvesting facilities, pumping from a nearby water source or hiring a water tanker vehicle to deliver water to their facilities. Such extra expenditures increase the operational costs making doing business expensive.

Uganda has greatly increased the provision and supply of accommodation in the recent past. UBoS (2011) suggests that there were 64,602 enterprises in the accommodation and restaurant sub-sector, the majority of which were restaurants. However, accommodation facilities are unevenly distributed with the central region having 47 percent, 23 percent in the western region, 18 percent in the eastern region and 12 percent in the northern region (MoTWA 2014). The distribution illustrates that current accommodation status is not aligned to the conventional tourism accommodation markets/destination.

2.4 Conservation

Uganda is largely a nature based tourism attraction country making the conservation of natural and cultural heritage very significant to the tourism industry. Uganda has an exceptional quality of natural attractions ranging from rich and diverse wildlife to a vast array of landscapes with incredible aesthetic beauty. The government has designated a number of protected areas, which include national parks, wildlife reserves and wildlife sanctuaries, community wildlife areas, central forest reserves and local forest reserves in order to conserve these natural and cultural heritage. However, even when approximately 650 designated cultural heritage sites and monuments have been identified by the department of Museums and Monuments as being of significant value most of the sites are not mapped and documented (MoTWA 2014). The protected areas, monuments and cultural heritage sites established are faced with challenges of ensuring that they are sustainably utilised and managed. Owing to the rapid population growth, a number of protected areas have experienced human-wildlife conflicts such as poaching. Some cultural heritage sites have been degraded. The current oil and gas exploration in ecologically sensitive protected areas and construction of hydroelectric power dams along rivers which have a number of tourism resources and products pose threats to the conservation of nature. The situation is made worse by existing weak laws or the inadequate implementation of the existing laws to conserve the heritage resources. According to MoTWA (2014) the current law on Museums and Monuments is weak with inadequacies to prevent the vandalizing of cultural sites and monuments, or prevent illicit trafficking of antiques and encroachment on cultural land.

2.5 Tourism Products

According to World Bank (2013) Uganda's product offering does not yet match its extensive set of natural and cultural resources, implying that more is required to build and diversify tourist products in the country. Uganda is largely a nature based tourist products country particularly wildlife especially the iconic mountain gorilla. The few wildlife species available are over relied on by tourism operators when marketing Uganda as a tourism destination. The country's iconic product is the mountain gorillas found in Bwindi and Mgahinga National Parks (MoTWA 2014). There are other potential products such as cultural, historical and Meetings, Incentive Travel, Conference and Exhibitions (MICE) that are yet to be fully exploited. The challenge with the MICE is that they are mainly located in Kampala and Entebbe and a few other regional towns which are not in the main tourist destination areas. Uganda is unique in that, it has snow-capped peaks on the Equator. These should be developed into full products. Others that can be tapped into include but not limited to: cultural heritage – kingdoms, the Amin era, colonial history episodes like the Victorian-era explorers, archaeological remains and the restored colonial-era buildings. A proactive government development plan to exploit these untapped potential is critical.

2.6 Human capital for tourism

The availability, quality and deployment of human resources is vital to the success of tourism destination development. Relevant skills and knowledge of the sector plays an important role in developing tourism. According to MoTWA (2014), human resource development in tourism is a fundamental part of the enabling environment. The sector cannot achieve full potential without well trained, educated and motivated human resources who can develop effective policies, plan, manage, market and deliver quality products and services to visitors. The numbers of tourism and hospitality training institutions have increased over the years providing a wide range of courses. The challenge is that both public and private training institutions are faced with limited training equipment and infrastructure, inadequate human resource capacity, unharmonised curricula and limited application of modern technologies in learning and training. The end

result of this trend is low skills that exhibit low and unprofessional service delivery.

3. LITERATURE REVIEW

Literature on tourism in Uganda shows rekindled interest in the sector which used to perform very well in 1960s and was negatively affected by the political crisis in the 1970s and conflict in the central, northern and western parts of Uganda thereafter. Exploration of recent literature shows four main areas of emphasis in addressing tourism development in the country which include: regional integration, strategies for developing the sector's potential, attempted efforts to evaluate the impacts of tourism on the economy and illustration of Uganda as having a high potential for tourism development. Since 2012, the WTTC has pointed out that Uganda has high potential for tourism growth with an annual growth rate of 6 percent. It is envisaged that tourism will stimulate growth in other sectors including agriculture, industries and sub-sectors within the service sector if the existing potential is tapped into. Specifically, the growth in tourism sector will enhance investments, employment provision and income generation. In spite of such assertions, limited analysis has been done to gauge how this should be achieved and what should be specifically done to enhance the gains from the sector. At the same time global tourism has been on rapid expansion benefiting mostly those countries with strategies for maximizing tourism gains along the tourism value chain. Moreover, the country needs to develop strategies that will harness the returns from the expanding tourism sector to address its development challenges.

Uganda has been urged to cooperate with other nations into regional integrated tourism markets to maximize returns from tourism (World Bank, 2013). The East Africa Community (EAC) which Uganda is a member of has proposed strategies that will enhance tourism within the region (EAC, 2006). The strategies include marketing East Africa as a single destination; formation of the East African Tourism and Wildlife Coordination Agency; launch of a travel magazine; accommodation grading; common tourist visa; and having a Single Customs Territory (SCT). There will be benefits to be accrued from the integrated regional

approach to tourism development, nevertheless, specific country strategies for developing tourism products are necessary since inter-country tourism products competition will persist even with a regional approach.

A UNECA³ (2011) report highlighted opportunities and challenges for tourism development for Eastern Africa countries including Djibouti, Ethiopia, Eritrea, Democratic Republic of Congo (DRC), Comoro, Madagascar, Seychelles, Somalia and EAC member countries. In each of the countries, a SWOT analysis of the tourism sector and growth diagnostics were presented. The report echoed the need for regional integration tourism marketing to maximize gains and for sustainable tourism. Furthermore, a sustainable tourism development master plan for the Intergovernmental Authority on Development (IGAD) Region 2013-2023 was published (UNECA 2013). The master plan which benefited from the SWOT⁴ analysis by UNECA discusses priority intervention areas including policy regulatory and institutional framework; tourism product development; tourism marketing; human resources development; research and development; tourism safety and security; investment in tourism; infrastructure development and tourism natural and cultural heritage conservation. The master plan is for IGAD members including Sudan, South Sudan, Eritrea, Ethiopia, Djibouti, Kenya and Uganda. The comprehensiveness of the two reports by UNECA (2011; 2013) notwithstanding mostly provided general interventions for the countries without detailed analysis of the tourism typology. While addressing some of the interventions including those on product development, marketing, research and development, and conservation of natural and cultural heritage, it is critical to address tourism typologies especially at a country level as they play a significant role in the attraction of visitors to a given tourism destination. Homogeneity of tourism trends, opportunities, threats and tourism products is observed across various countries and only a detailed evaluation of countries tourism potential in comparison with others will allow practical interventions at country level. Therefore whereas regional approach is extremely timely, Uganda as a country needs to locate the niche within such a

framework which necessitates a comparative analysis at the regional level.

Mwaura and Ssekitoleko (2012) use the global production network methodology to review Uganda's tourism sector for economic and social upgrading. The study describes value chain actors within Uganda and identifies research gaps on tourism development. The study highlights two issues of research concerns including establishing factors influencing tourism visits and evaluating options for tourism value addition in the country. The need for research interventions on the two issues arose from concerns of large proportions of land for wildlife and tourism against dismal returns which perpetuates government subsidisation of the tourism sector. A study by EPRC (2011) has shown that out of about 23 protected areas that are considered as tourism attractions, only four including Murchison Falls National Park, Queen Elizabeth, Bwindi Impenetrable forest and Mganga generate income sufficient enough to cover basic costs toward their maintenance. Another concern was the fact that most tourists visiting Uganda are either in transit to/from other country destinations or have entered the country for other reasons beyond nature typologies evidence.

Tourism has been prioritized among eight primary growth sector with the highest potential for enhancing growth, employment and socio-economic transformation in the NDP (Republic of Uganda 2010). The Uganda Vision 2040 (Republic of Uganda 2013) a three-decade development plan echoed the tourism development strategies highlighted in the NDP I. The plan identified constraints to tourism development to include inadequate policy framework; inadequate public and private institutional capacity to initiate meaningful development; limited funding, lack of adequate skilled labour; negative perception about the country's image due to past insecurity; inadequate physical infrastructure; narrow product diversity; inadequate understanding of tourism market potential and promotional strategies; inadequate research; and development of the tangible and intangible heritage. The plan objectives on tourism are to develop and review the policy, legal and regulatory framework; and increasing the contribution of tourism to GDP and employment. In responding to its objective, the plan recommended fourteen strategies: development of

3 United Nations Economic Commission for Africa

4 Strengths, Weaknesses Opportunities and Threats

policies, legal and regulatory framework; diversification of tourism products; country promotion as a tourism destination; safety and security enhancement; resources sustainability; developing human resources infrastructural and institutional linkages. Among its strength was the comprehensiveness in pin-pointing out the sector's constraints and development strategies. Also identified are the potential tourism mix for Uganda which include: eco-tourism; cultural heritage; faith based tourism (Namugongo Shrine, hills housing important symbols of Catholic Anglican, Bahai, Pentecost and Islamic faith); community tourism; Meetings, Incentives Conferences and Events (MICE), white water and game drives.

The Uganda Tourism Development Master Plan 2014-2024 (UNWTO and UNDP, 2014) was developed in response to the fact that, tourism has not been fully mainstreamed in all sectors of government activities to harness the multi-sectoral dimensions of the industry. Other rationale for the master plan include the need for intensifying and increasing Government support for the tourism sector. The country lacks an up-to-date tourism development plan after the 10-years developed in 1993 came to an end. The Master Plan prescribes strategies to unlock the country's exceptional range of natural and cultural tourism assets potential resulting into a significant boost of the sector's contribution to the economy especially on enhancing foreign receipts and employment. The plan comprehensively analyses and recommends requisite interventions on tourism planning and management; destination marketing; infrastructure development; human resource development; product development; conservation of natural and cultural heritage; tourism financing and investment; safety and security; private sector capacity development; and community tourism development. Its recommendations also address implementations gaps identified by the NDPI.

The Master Plan curves six areas distributed across Uganda referred to in the report as Tourism Development Areas (TDAs). They are essentially development zones or clusters which designate tourism regions with proposed integrated programmes and actions with the intent to develop the tourism sector in a comprehensive

and cost effective way (UNWTO and UNDP 2014).⁵

The main rationale for curving out the TDAs was in reference to the administrative structure of Uganda, specifically the Local government areas. This is convenient for administrative purposes. However, tourism destinations sometimes do not follow this pattern and therefore, the proposed tourism circuits/clusters become more relevant and appropriate.

4. METHODOLOGY

The study adopted three approaches to conduct the research: desk review, key informants interviews and secondary data analysis. The desk review basically surveyed literature on the different efforts undertaken to develop the tourism sector in Uganda and the East Africa.

The key informants' interviews targeted individuals who work within the sector especially those in government Ministries Departments and Agencies, and those in the private sector. Individuals were interviewed from the following organizations: the Ministry of Tourism, Wildlife and Antiquities, Ministry of Finance, Planning and Economic Development, Uganda Tourism Board, Uganda Wildlife Authority, Private Sector Players, Uganda Wildlife Education, Uganda Wildlife Tourism Training Institute, Hotel Training and Tourism Institute and Ministry of Information Communications

⁵ **The Central TDA**, (the 'Cultural Heartland'), comprised of Kampala, Kalangala, Mpigi, Wakiso, Mukono, Buikwe, Maksudaka and Kalungu. In addition this TDA incorporates the Sese Islands and the Mabira Forest.

The South-Western TDA, (the 'Gorilla Forests' and Pastoral Lands) – composed of Kisoro, Kabale, Kanungu, Ntungamo, Mbarara and Sheema districts. It covers key attractions such as Bwindi Impenetrable Forest and Lake Mburo National Parks.

The North-Western TDA, 'Safari and River', - composed of Bulisa, Masindi, Kiryandongo, Nebbi, Nwoya, Oyam, Hoima and Gulu districts. It incorporates Murchison Falls National Park as well as Bugungu and Karuma Wildlife Reserves and the north east shoreline of Lake Albert.

The Western TDA, (the 'Lakes and Mountains of the Moon') - composed of Rubirizi, Kasese, Kabarole, Bundibugyo, Ntoroko and Rukungiri districts. It focuses on the Queen Elizabeth, Rwenzori Mountains and Semuliki National Parks. It also incorporates the Kigezi, Kyambura, Katonga and Toro Semuliki Wildlife Reserves.

The North-Eastern TDA, ('Cultures and Open Plains'. Includes districts of Kaabong, Moroto, Kotido and Napak. The region embraces the Kidepo Valley National Park and extends southwards to the Matheniko and Bokora Wildlife Reserves.

The South-Eastern TDA, (the 'Nile and Adventure'), covering the districts of Jinja, Tororo, Luuka, Iganga, Manafwa, Mbale, Sironko, Kapchorwa, Kween, Nakapiripirit, Bulambuli, Bukwa, Butaleja, Busia, Namayingo, Bugiri and Mayuge. This where Mount Elgon National Park, a section of the Victoria Nile as well as the Pian Upe Wildlife Reserve and RAMSAR sites on Lakes Nakawa, Opeta and Bisina.

Technology. Basically the interviews covered institutional and organization mandates with regard to the questions the paper seeks to answer as detailed in Appendix A 1. In summary the questions addressed the following themes: policy and oversight management, co-ordination of the tourism sector, the challenges the sector faces, how the private and public sectors interact, the tourist numbers, contribution of the sector to the economy, the tourist products, funding of the sector, the necessary reforms in the sector, implementation of the new tourism development areas and cluster concept, infrastructure such as accommodation, rest stops and restaurants, roads, utilities, the skills deficit in the sector and the required curriculum to overcome this problem among others.

The information generated was analysed thematically and incorporated into the entire report to augment the information generated through analysis of secondary data and document review. The main part of the study which used secondary data drew from the different sources that included: World Travel and Tourism Council, World Development Indicators, the EAC factors and Figures reports, the statistical abstracts from EAC partner states produced by (Uganda Bureau of Statistics, Kenya National Bureau of Statistics, National Institute of Statistics Rwanda) and World Economic Forum. The analysis generated the tables and figures as presented into the report.

A detailed survey that would have generated better data for the study was not done owing to financial limitations. This if done will generate more information on the proposed Tourist Development Areas and Cluster concepts that are being formulated in the sector. More work should also be done in the areas of using decentralized local government structures to

promote tourism.

5. FINDINGS

This section presents and discusses findings of the comparative analysis of the tourism sectors among the EAC partner states. The issues analysed and discussed include: contributions to GDP, income from the tourism sector, arrivals of tourist and their origin, expenditure and investment, government collective spending, facilities, employment, safety and security, and infrastructure development.

5.1 Contribution to GDP

Tourism has become a major player in economic development and poverty alleviation in African (UNECA 2013). This is so given the crucial role tourism plays in foreign exchange earnings, job creation, revenue generation and the multiple effects that arise from the sector. However, even with such significant contribution, the potential of tourism is yet to be fully exploited. According to the WTTC (2014), the contribution of travel and tourism to GDP has significantly grown in all the five EAC countries since 2008 although individual country differences are salient as illustrated in Table 2. Kenya is the leading partner state in the contribution of travel and tourism to GDP which grew from US\$ 1.7billions in 2008 to US\$ 2.1billions in 2013 with the potential to expand to 3.6billions by 2024. Tanzania is the second and Uganda follows next. During the same period tourism contribution to GDP in Uganda increased from US\$ 631millions to US\$ 951millions, less than a half that of Kenya. Uganda's projected contribution to GDP by 2024 is rather small in comparison to the two, suggesting that radical policy measures need to be put in place to realize even higher levels.

Table 2: Direct contribution of travel and tourism to GDP in US\$ millions (real 2013 prices)

	2008	2009	2010	2011	2012	2013	2014 ^E	2024 ^F
Burundi	33	50	58	57	55	56	56	71
Rwanda	183	199	188	226	246	263	274	419
Uganda	631	738	829	924	900	889	951	1,676
Tanzania	1,207	1,151	1,217	1,360	1,396	1,406	1,461	2,676
Kenya	1,755	1,629	2,037	2,226	2,218	2,125	2,186	3,639

NB: ^E = Estimated values; ^F = forecasted values.

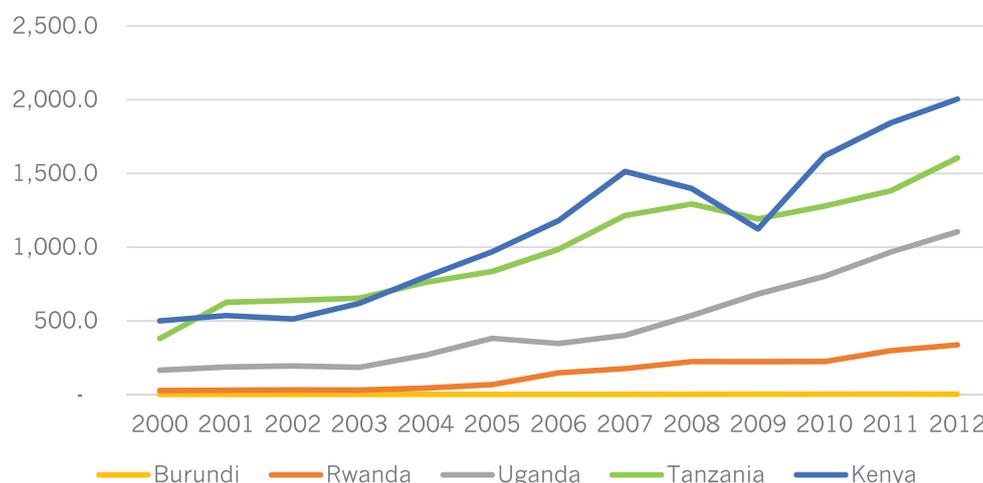
Source: World Travel and Tourism Council 2014 reports for Kenya, Uganda, Tanzania, Burundi and Rwanda.

5.2 Incomes from the tourism sector

The industry continues to significantly contribute to foreign exchange earnings among the EAC countries. It is evident from Figure 1 that the foreign exchange earnings from tourism have generally been on upward trend generating millions of dollars. Between 2000 and 2012, Kenya was the leading foreign exchange earner followed by Tanzania, Uganda Rwanda and Burundi. The conflict situation in Kenya in 2008 following elections precipitated a decline where Tanzania overtook Kenya but by 2010 Kenya had fully recovered and was in the lead. Uganda although steadily increasing its earnings over the period, is still way behind Tanzania and Kenya. For that matter, with all the vast potential, Uganda has room for improvement and development of the sector to earn even more.

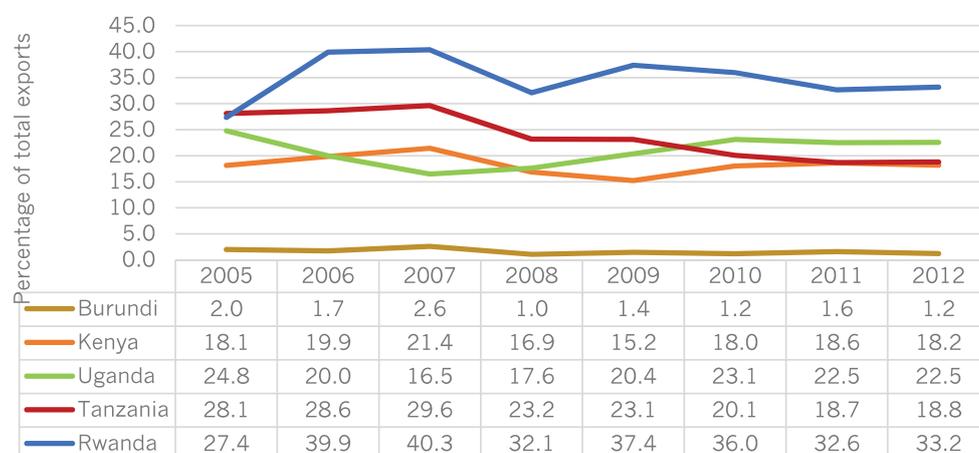
However, in terms of the contribution to total exports, international tourism exhibits different patterns among the EAC countries that depart from the previous analysis (Figure 2). The trends for all the countries illustrate declining or stagnant patterns of the contribution of tourism to total exports, which is rather discouraging phenomena. Rwanda leads in terms of contribution of tourism to total exports followed by Tanzania, Uganda, Kenya and Burundi. The region as a whole has an enormous responsibility to promote and develop the tourism industry to increase the proportion of total exports from it. Uganda's performance shows a great improvement to the second position after 2010 which should be consolidated.

Figure 1: International tourism, receipts (current US\$ millions)



Data source: World Development Indicators

Figure 2: International tourism receipts (% of total exports)



Data Source: World Development Indicators

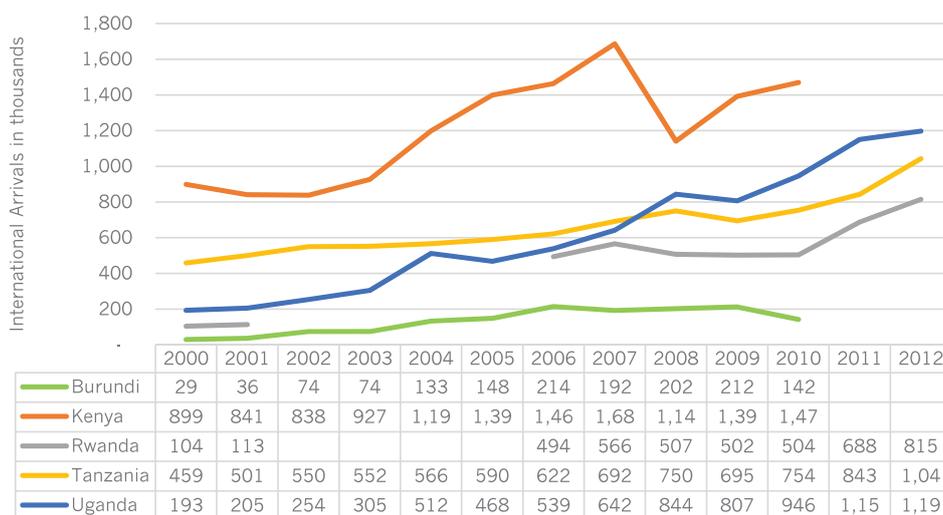
5.3 EAC total arrivals and proportion by countries

Figure 3 illustrates that Kenya leads in arrivals followed by Uganda and then Tanzania. Arrivals in EAC rose from 2.7 million in 2004 to five million persons in 2012. A decrease in the arrivals was albeit observed in 2008 which corresponded with a sharp decline in the ratio of arrival to Kenya. Uganda increased its arrivals overtaking Tanzania which was the second until 2008. Note that the performance of Rwanda is quiet impressive given the country’s history and potential for tourism.

In 2005 more than a half of all arrival to EAC were Kenya for bound. Kenyan ratio of arrivals for the EAC total has been declining from over 50 percent in 2005 to 35 percent in 2015. In 2008, Kenya recorded the

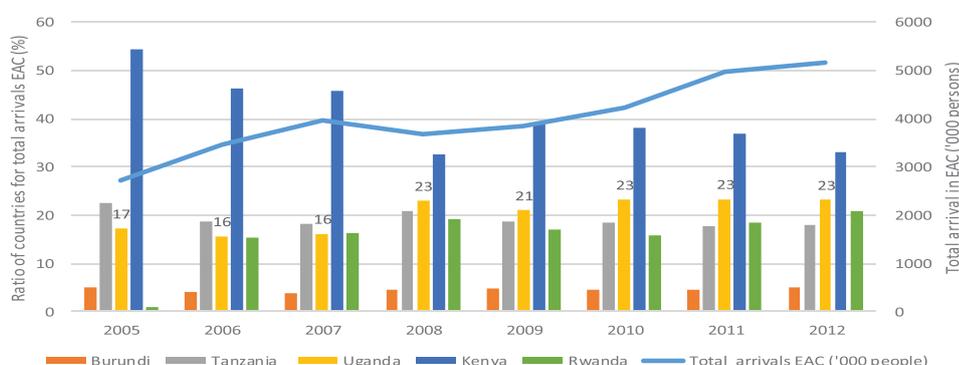
lowest ratio of the total arrival in EAC due to the political conflict and post-election turmoil and has since then been struggling with insecurity negatively impacting arrivals. The ratio of total arrivals in EAC heading to Burundi has remained constant at five percent between 2005 and 2013. Rwanda and Uganda have been recording an increase in their ratios for the total arrival in the EAC which may explain the decline of Kenya’s proportion. Uganda’s ratio of total arrival to EAC accounted for an average of 16 percent between 2005 and 2007 and thereafter increased to an average of 23 percent. So far no drastic interventions have been associated with such positive impacts on tourism arrivals. Plausibly, the conflict in Kenya in 2008 and the Common Wealth Heads of states meeting in 2007 can offer partial explanations for Uganda. Despite Tanzania having a peaceful duration between 2005

Figure 3: International Arrival into the EAC ('000)



Data Source: World Development Indicators

Figure 4: EAC Tourism arrivals and ratio of total arrivals for different countries



Source: EAC Facts and Figures 2011, 2012; Rwanda Statistical Abstract 2013.

and 2012 unlike Kenya, its ratio of arrivals compared to the total of EAC declined from 23 percent in 2005 to 18 percent by 2012.

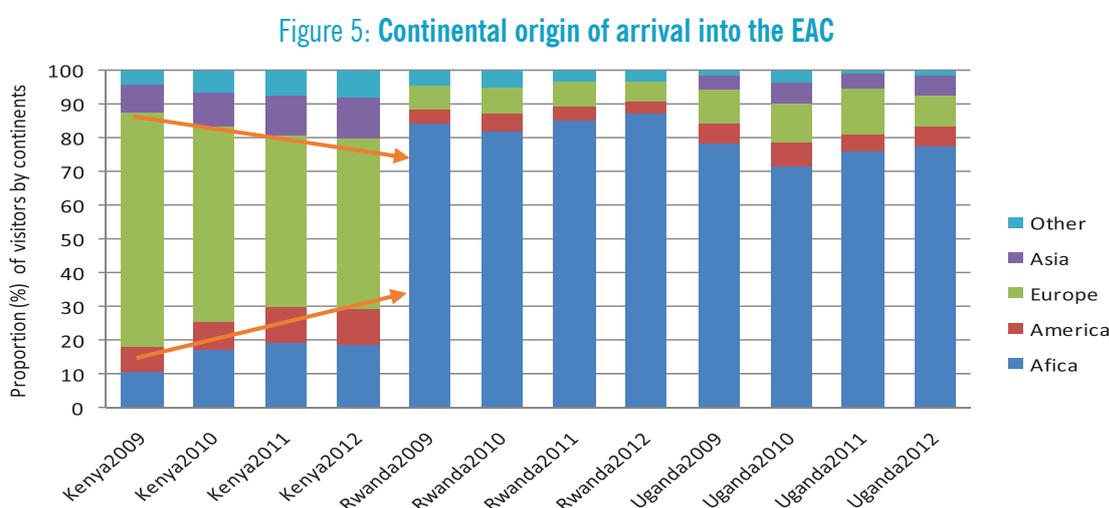
5.4 Continental origin of arrivals into EAC

A contrasting pattern on origin of visitors arriving in Kenya and other countries (i.e. Uganda and Rwanda) is observed in Figure 5. While a larger proportion of arrivals in Kenya are from Europe, more than 82 percent of visitors in Rwanda between 2009 and 2012 were from Africa. Between 2009 and 2012, arrivals from Africa in Uganda ranged between 72 to 78 percent. Arrivals from Europe account for the second largest proportion in Uganda that have ranged between 9 to 13 percent. Americans, Asians and others account for the least of arrivals in Uganda. No clear trend is observed on the changes of the proportion of arrivals from different continents in Uganda and Rwanda between 2009 and 2012. The proportion of arrivals from different continents in Kenya is observed to be changing with time. Arrivals from Europe have reduced from 70 percent in 2009 to 50 percent in 2012. Reduction in arrivals from Europe in Kenya consequently leads to increase in proportion of arrivals from other regions including Africa, America, Asia and others.

Origin of visitors to a country has ramifications on the purpose of visit and tourism expenditure. First, the estimated economic value of tourism increases with the distance when economic models especially tourism travel cost methods is used. Secondly, neighbouring countries tend to have friends and relatives across boundaries consequently leading to the purpose of visit by a large proportion of arrivals between these countries being visiting friends and relatives. Thirdly, domestic expenditure by tourists from Europe and Americas have been observed to be highest and African the lowest among the East African countries (Tanzania National Bureau of Statistics 2010; UBoS 2012). A look at tourist expenditures further shed light on the implications of the origin of a tourist to a country.

5.5 Tourism expenditure and investment

International tourism expenditures are expenditures of international outbound visitors in other countries, including payments to foreign carriers for international transport. On the other hand tourism expenditure refers to the amount paid for the acquisition of consumption goods and services, as well as valuables for own use or to give away, during tourism trips. The expenditure determines how a country benefits from tourists in

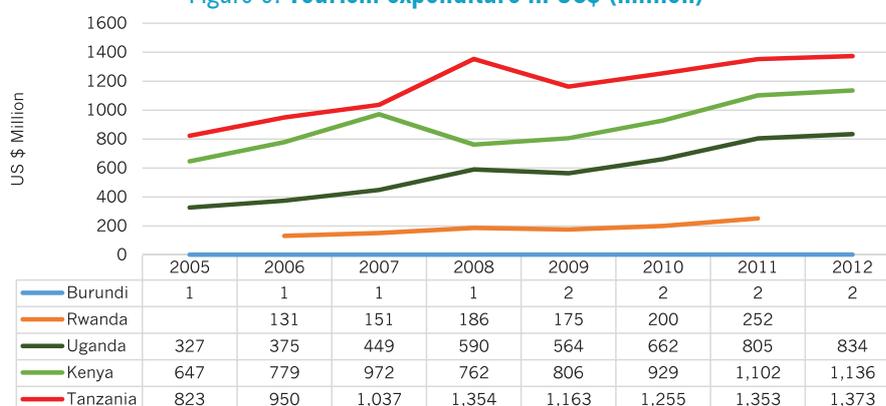


Source: Kenya National Bureau of Statistics (2013); National Institute of Statistics of Rwanda (2013); UBoS, 2013.

a country regardless of numbers visiting. As alluded to in the preceding section, tourists from different origins have different expenditure patterns. Figure 6 demonstrates that between 2005 and 2012, there was a steady growth among all the EAC countries in international tourist expenditure except Burundi which exhibited a constant trend. It is evident that Tanzania leads followed by Kenya, Uganda, Rwanda and then Burundi. Uganda should improve in this area in order to optimally benefit from tourist and should tailor the tourism sector to attract tourist from destinations with higher per capita expenditure once in the country.

Capital Expenditure: The tourism sectors in the EAC partner states are largely private sector driven meaning that investments are made by both the public and private sectors. Table 4 gives the contribution of travel and tourism to capital investment in US\$ millions (real 2013 prices) in the EAC partner states which is a sum of public and private investments. Uganda lags behind Tanzania and Kenya in the contribution of capital investment by the tourism sector. Between 2008 and 2014, Uganda realized below half what Kenya realized and just a third compared to Tanzania. It is evident that Uganda’s investment into the sector from that

Figure 6: Tourism expenditure in US\$ (million)



Source: EAC Fact and Figures 2013.

Government collective spending: The governments of EAC partner states exhibit different levels of financial commitment into the individual national tourism sectors (Table 3). Compared to Kenya which leads followed by Tanzania, Uganda’s collective spending on the tourism sector is extremely small and projections by WTTC, by 2024 do not significantly portray a radical shift. This pattern of government collective spending should be reviewed and scaled up close to the levels of Kenya and Tanzania. Uganda’s vast potential can be tapped in and developed once the relevant areas are identified and invested into.

capital investment perspective needs to be scaled up by both the private and public sectors. Government needs to put in place ideal conditions to attract more capital spending in the sector which perhaps will lead to attraction of more tourist with higher potential of spending more in the country.

Table 3. Government collective spending in US\$ millions (real 2013 prices)

	2008	2009	2010	2011	2012	2013	2014 ^E	2024 ^f
Burundi	2.5	2.6	2.6	2.5	2.6	2.6	2.8	4.8
Rwanda	10.7	11.7	13.2	13.8	14.8	15.9	17.1	33.6
Uganda	42.3	43.1	46.8	39.1	38.4	40.2	42.8	82.1
Tanzania	193.3	206	204	224.5	240.8	258	276.9	547
Kenya	355.7	361.5	414.8	435.6	457.7	473.9	497.0	843.5

Note: ^E= Estimated values; ^F= forecasted values

Source: World Travel and Tourism Council 2014 (Kenya, Uganda, Tanzania, Burundi and Rwanda)

Table 4: Contribution of travel and tourism to capital investment in US\$ millions (real 2013 prices)

	2008	2009	2010	2011	2012	2013	2014 ^E	2024 ^f
Burundi	14.1	3.0	3.6	4.6	5	4.9	4.8	6.1
Rwanda	157	87.6	101	109.8	128	81.5	150.6	212.7
Uganda	205.4	231.7	255.6	272.9	256.4	264.9	273.0	547.6
Kenya	674.7	587.4	548.0	608.3	648.8	646.5	661.6	1,114.6
Tanzania	703.0	766.8	851.5	913.5	943.1	958.2	980.7	1,868.1

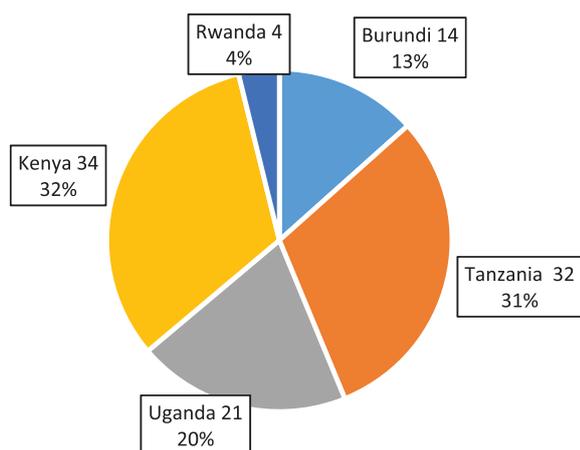
Note: ^E= Estimated values; ^F= forecasted values.

Source: World Travel and Tourism Council 2014 (Kenya, Uganda, Tanzania, Burundi and Rwanda).

5.6 Facilities

Despite its high potential in product development for attraction of tourists, the EAC largely promotes itself as a destination for nature and cultural based attractions (UNECA 2013). The tourism products appear quite homogenous calling for its differentiation for competition among the countries especially with the adoption of a common visa protocol. Significant amount of land has been allocated to protection areas for wild fauna and flora with a direct economic objective of attracting tourists. According to EAC (2012) the total number of protected areas in EAC is 105 comprising of parks and reserves. Kenya leads with 34 followed by Tanzania, Uganda, Burundi and Rwanda with 32, 21, 14 and 4 protected areas respectively (Figure 7).

Figure 7: Game estates (both Game parks and Reserves)



In Uganda, protected areas constitute a significant proportion of the country area equal to approximately a tenth of the total. The game estates in East Africa can be categorized for the purpose of product differentiation into:- i) protected area attracting game

drives tourism (savanna grasslands); ii) ice-capped tropical mountain climbing tourisms; iii) dense forests associated with mountain moorlands tourism; and iv) primate tracking tourism sites. Distribution of these wildlife-based tourism products vary across countries and localities. For Example although Kenya and Tanzania have extensive savanna grassland attracting game drive tourism, they lack the primate tracking based protected areas which are the preserve of Uganda and Rwanda. Much as the EAC region may want to promote tourism together, it is evident for purposes of competitiveness, Uganda needs to identify and develop niches that the country has a comparative advantage over the EAC partner states.

5.7 Source of Employment

Unemployment is a major challenge facing all countries in the world and the EAC is not an exception. The UNECA(2012 and 2014) estimates that the average rate of unemployment in Sub Saharan Africa stands at 11 percent and that the actual situation is worse as the proportion of the working poor (those earning below the poverty line - US\$1 per day) is considerably high. The tourism industry in the EAC has considerably contributed to solving the unemployment problem by providing direct and indirect, formal and informal, skilled, unskilled and semi-skilled employment. The main labour absorption areas include hotels, tourism intermediary organisations such as tour operators and travel agents and informal settings dominated by vending and hawking of various goods and services in tourist hotspots. Table 5 illustrates the magnitude of both direct tourism employment among EAC partner states.

Table 5: Direct contribution of travel and tourism to employment (thousands)

	2008	2009	2010	2011	2012	2013	2014 ^E	2024 ^F
Burundi	20.2	31.3	35.6	34.8	33.5	32.9	32.5	29.7
Rwanda	57.8	60.8	54	61.8	64.7	66.5	66.6	71.7
Uganda	151.1	173.1	189.7	202.4	186.2	182.4	191.3	263.5
Kenya	202.0	188.6	230.1	252.3	241.7	226.3	225.5	283.9
Tanzania	415.3	368.9	380.5	403.9	416.6	402.3	400.8	499.9

NB: ^E= Estimated values; ^F= forecasted values.

Source: World Travel and Tourism Council 2014 (Kenya, Uganda, Tanzania, Burundi and Rwanda).

The EAC partner states combined experienced an increase in the direct contribution of travel and tourism to employment from about 850,000 in 2008 to close to one million in 2014. Tanzania consistently provided more direct employment between 2008 and 2014 followed by Kenya with Uganda coming in the third position. Tanzania more than doubled the statistics for Uganda throughout the analysed period. Although, the projection by 2024 for Uganda does not significantly rise, this may change if more private and public investments are made into the sector. Achieving this for Uganda would be in agreement with WTT that recommends that for every eight international tourist arrivals, at least one direct job should be created.

the factors and policies that make it attractive to develop tourism in different countries. The attributes are policy related as they are in direct control of the government and hence categorised under travel and tourism regulatory framework. Tourists are deterred from travelling to dangerous countries or regions, making it less attractive to develop tourism and travel. The Travel and Tourism Competitiveness Index takes into consideration four parameters in its safety and security pillar and they include: business costs of terrorism; reliability of police services; business costs of crime and violence; and road traffic accidents. Table 6 highlights the performance of the EAC partner states with respect to the safety and security ranking.

5.8 Safety and security

Safety and security is among 13 pillars of travel and tourism competitiveness index for measuring

Table 6: The WTT Ranking on Safety and Security among EAC members between 2007 and 2013

	2007		2009		2011		2013	
	Rank/124	Score	Rank/130	Score	Rank	Score/139	Rank/140	Score
Kenya	116	3.12	121	3.88	139	3.17	135	3.19
Rwanda	-	-	-	-	39	5.37	59	4.92
Tanzania	79	4.09	98	4.59	115	4.00	120	3.70
Uganda	109	3.44	109	4.25	117	3.98	124	3.64
Burundi	108	3.45	106	4.35	132	3.40	133	3.34

Source BN, 2007; 2009; 2011; 2013.

The EAC states performed poorly on safety and security ranking with all of them except Rwanda being in the last 20 globally in 2013. Kenya is ranked the poorest at 135 out of the 140 countries (this arises from the recent terrorist activities the country has experienced after the post–election conflict), while Burundi, Uganda and Tanzania follow in that order. Unfortunately, all the EAC partner states have had their ranking deteriorating over time. Among EAC states Rwanda has been performing relatively well in comparison.

5.9 Infrastructure development

Travel and tourism business environment and infrastructure is among the three categories of variables that facilitate or drive travel and tourism competitiveness. Key components of travel and tourism business environment which enhance and attract tourism include state of air, transport, ICT infrastructure, and tourism facilities and services. Other factor associated with infrastructure which influence growth of tourism is price competitiveness. Failure of a country to invest in airport infrastructure, has ramification on the number of flights to destination consequently leading to poor access by international

travellers, high costs of connection and uncompetitive air fares. Local transport infrastructure and networks facilitate tourism site access and contribute to tourism experience hence destination attractiveness and competitiveness (Khadaroo and Seetanah 2008). ICT infrastructure is important due to the critical business role online services plays in distribution and promotion of travel and tourism products. ICT has become important for tourists as good infrastructures allows visitors to keep on communicating and in-touch with their routine business and services while on-bound. ICT infrastructure includes internet and online services, telecommunication and broadband.

Infrastructure development is not only important to tourism industry but also enhances investments and benefits in other productive and services economic sectors. Inadequate infrastructure and related services leads to tourism capacity dearth; narrow choice of tourism products; market marginalization; enclave industries and foreign-based tourism; weak information and communication technologies (ICT) penetration; and inadequate harnessing of the potential of regional integration (UNECA 2013).

Table 7: Business environment and tourism infrastructure for EAC states (T&T competitiveness index 2013)

Indicator	Burundi	Kenya	Rwanda Rank	Uganda	Tanzania
Effectiveness of marketing to attract tourists	129	12	10	63	80
Comprehensiveness of T&T data (0–120)	130	86	104	128	117
Quality of air transport infrastructure	135	65	84	106	115
International air transport network	120	54	75	76	112
Quality of roads	119	72	40	108	93
Quality of port infrastructure	133	90	108	89	115
Quality of ground transport network	123	56	47	80	96
Road density/million pop.	59	110	51	74	110
Hotel rooms/100 pop.	140	122	130	121	118
Presence of major car rental co. (1–7)	123	82	123	111	111
ATMs accepting Visa cards/million pop	138	105	128	124	125
Individuals using the Internet, %	138	93	122	111	112
Broadband Internet subscribers/100 pop.	137	121	129	120	133
Mobile telephone subscriptions/100 pop.	139	118	134	127	125

Source: WEF 2013.

6. THE WAY FORWARD

Uganda's vast tourist potential can be tapped into and developed once the identified relevant areas are invested into and impediments are addressed. The current investment in the sector is low compared to regional competitors like Kenya and Tanzania. Uganda needs to increase both public and private capital, and collective spending in the tourism sector to address some of the bottlenecks that impede growth and expansion to attract tourists. Uganda is a private sector led economy to the extent that the latter's involvement especially in providing tourism services is critical. Government needs to put in place ideal conditions (legal and institutional framework, requisite infrastructure among others) to attract more private capital spending in the sector which increases chances of attracting tourist with higher per capital expenditure. This will enable the country to optimally benefit from tourism by tailoring the sector to attract tourists from destinations with higher per capita expenditure once in the country.

There is limited integration of tourism planning and management in the local government structures. Local Government - Districts have better proximity to tourism attraction spots and therefore their reinforcement in terms of tourism personnel has higher chances of yielding better results. The decentralization framework however does not cater for tourism personnel at the local government level leading to reliance on volunteers who have primary responsibilities that make it difficult to apportion adequate time and concentration for tourism. Mainstreaming the activities of tourism at the district level should be addressed by identifying districts that must have tourism personnel since not every district qualifies. Since some districts and urban authorities are increasingly giving specific attention to the tourism sector by employing tourism officers and including tourism in their respective development plans lessons can be drawn from them for scaling up.

The Ministry of Tourism, Wildlife and Antiquities lacks an integrated data and information system for planning purposes. Data are scattered in different places within the sector without a proper system for tourism information management. For example current data on the location, quantity, quality, occupancy levels,

facilities and staffing of accommodation is incomplete and fragmented, inhibiting full analysis or breakdown of numbers of rooms and beds within the country. There is need to develop an Inter-ministry data collection and sharing mechanism to enable proper planning. Such an integrated tourism data and information management system should be institutionalized in the sector with high capacity for data collection, coordination and dissemination.

The Uganda tourism sector relies heavily on the abundance of natural resources that if well developed and branded have the potential to increase revenue a number of times compared to the current receipts. However product development and branding remains a challenge and the need to redefine a tourism product is important. The Uganda tourism brand should be visible with clear identity externally. This will entail systematic development of tourism products that can be marketed externally by extensive branding. Having a potential tourism product is necessary but not a sufficient condition to attract tourists. Product development is still a problem and marketing is still inadequate. For product development to be effected there is need to: (i) identify the tourism attraction product or location; (ii) development of the necessary infrastructure to and within the location (accommodation, restaurants, travel agencies, tour sites, crafts and other tourism support services like internet and security); and (iii) enhancing the participation of the local communities.

The sector will have to formalize the proposed tourism clusters/circuits that are currently being conceptualized to complement the tourism development areas. The potential for tourism circuits is immense, however, deliberate actions must be taken to develop, formalize and capacitate them. In turn, this should enable the clusters to operate as organic systems that are self-sustaining with a range of products and supporting infrastructure.

The infrastructure limitations are perhaps the greatest impeding factor to tourism product development. There is concentration of reasonable accommodation facilities in Kampala which is not the major tourist destination. Incentives should be formulated to attract investment targeting redistribution of accommodation and other related infrastructure facilities throughout

the country to be aligned to the conventional tourism accommodation markets/destination. The sector should provide adequate signage to guide visitors to and around tourist attractions, and provide travel/tourist maps. In the era of IT Uganda needs to organize efficient online booking and payment facilities to boost the numbers of tourists. The sector should provide rest stops (with clean toilets, food and beverage outlets) on roads and highways. There is need to improve air, road and water transport facilities, internet coverage, provide water and electricity and other cheap energy sources in all the destination areas to reduce on operational costs that increase the charges to tourists.

The skills development system should address human resources related issues of obsolete curricula, limited number of training institutions, and inadequate funding for the same. This will take a conscious effort of both the public and private sector to make investments.

Much as the EAC region may want to promote tourism together, it is evident for purposes of competitiveness, Uganda needs to identify and develop niches that the country has a comparative advantage over the EAC partner states.

For further research we propose two areas: a more detailed survey that can generate data to inform government the best ways to implement the proposed Tourist Development Areas and Cluster concepts and the sector utilizing the decentralized local government structures to promote tourism.

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APPENDIX

Table A 1: The sector institutions visited and the key areas that formed the interviews

Institutions	Key areas for the key informants interviews
Ministry of Tourism, Wildlife & Antiquities	<ul style="list-style-type: none"> • Policy and oversight management • Co-ordination of the tourism sector programmes & projects • Challenges the Ministry faces • Funding issues – adequacy, gaps, sources and suggestion • Interaction with the other sector players like the private sector • The number of visitors that come in the country • Needed reforms in the sector • The Tourism Development Areas and Cluster • Accommodation, rest stops and restaurants • State of infrastructure for tourism • Transport issues • Tourism and the decentralized local government framework
Ministry of Finance, Planning & Economic Development	<ul style="list-style-type: none"> • Budget allocation to the sector • Revenue raised from the sector • Mobilization of external funding for the sector • Policy incentive to attract investments in the sector • The role of the sector to the economy
Uganda Tourism Board	<ul style="list-style-type: none"> • Development of tourism products • Development of the Tourism Development Areas and Cluster • Marketing & Promotion of the tourism sector • Hotel grading and Classification • Building of tourism brands for Uganda • Licensing
Uganda Wildlife Authority	<ul style="list-style-type: none"> • Tourism Conservation • Funding of sub-sector activities • Community involvement in tourism • Infrastructure in parks and reserve areas
Uganda Wildlife Education	<ul style="list-style-type: none"> • Wildlife education • Habituation
Uganda Wildlife Tourism Training Institute	<ul style="list-style-type: none"> • Manpower planning for the sector • Curriculum for the trainees • Skills development
Hotel Training & Tourism Institute	<ul style="list-style-type: none"> • Manpower planning for the sector • Curriculum for the trainees • Skills development
Private sector	<ul style="list-style-type: none"> • Investment in tourism supportive infrastructures (hotel & accommodation, transport, training institutions, recreational facilities, banking, telecom) • Lobby and advocacy • Ethical practices within the sector • Challenges within the sector from a private sector perspective • Interaction with government sector agencies
Ministry of ICT	<ul style="list-style-type: none"> • The state of ICT infrastructure and what government is doing • The role the private sector can play regarding ICT for the sector

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