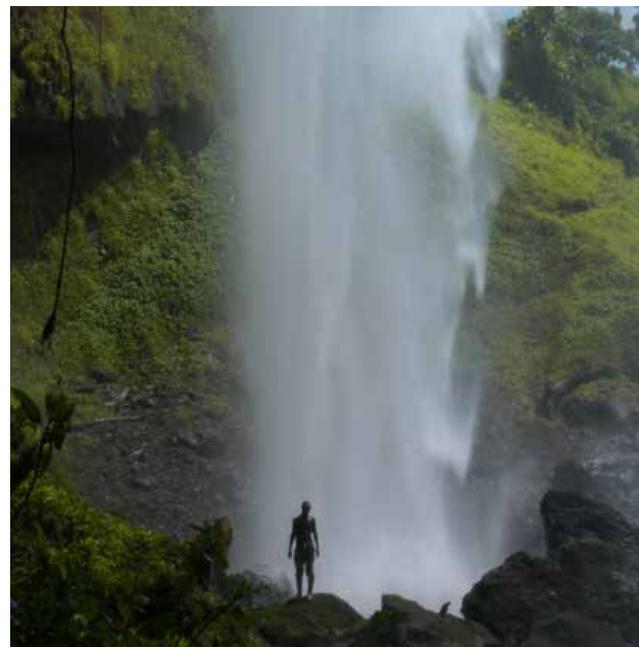
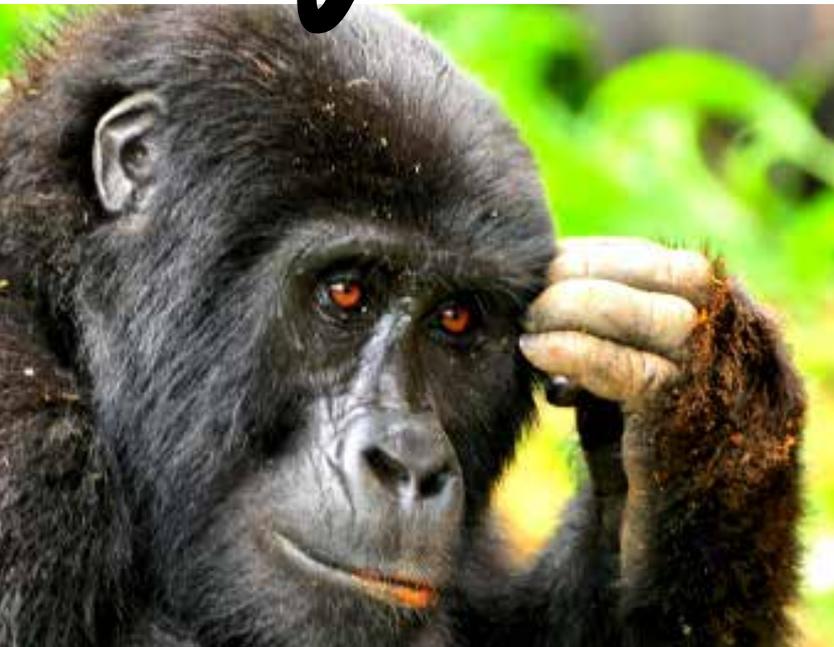




Uganda tourism

DEVELOPMENT
MASTER PLAN
2014 - 2024



Empowered lives.
Resilient nations.

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List of Acronyms

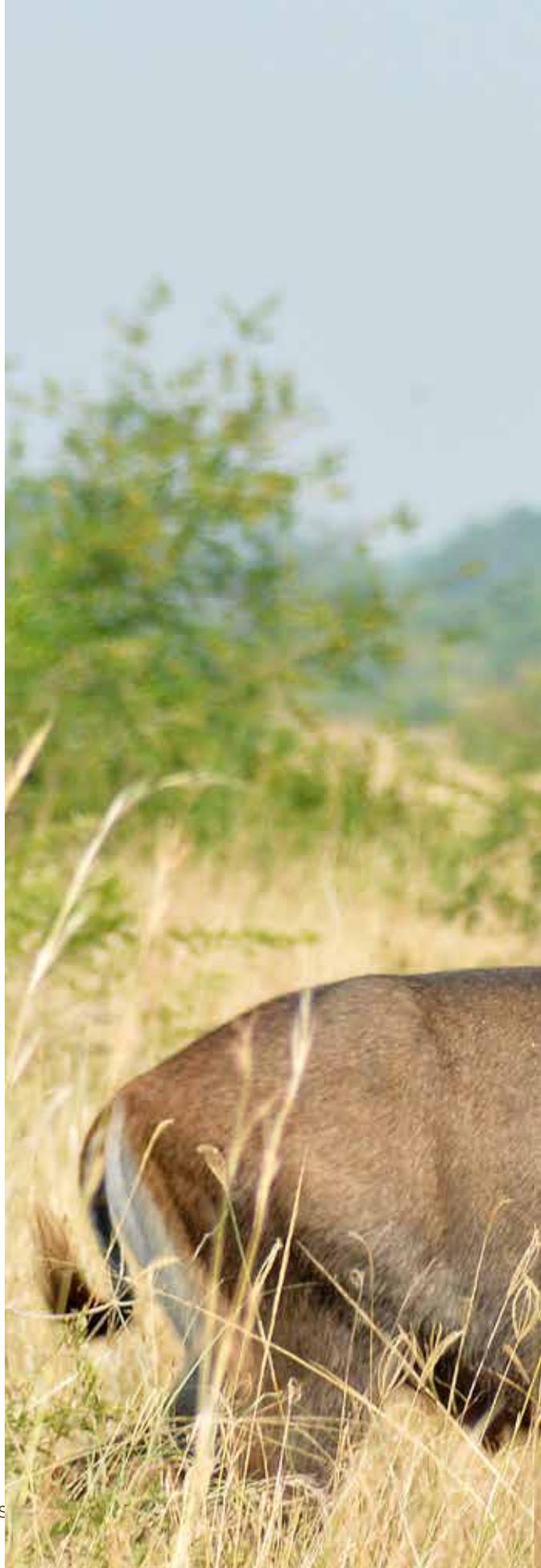
AEC	African Economic Community
AITO	Association of Independent Tour Operators (UK)
AMU	Arab Maghreb Union
AU	African Union
AUTO	Association of Uganda Tour Operators
AWF	African Wildlife Foundation
BTVET	Business Technical Vocational Education and Training Department (MoES)
CAA	Civil Aviation Authority
CBT	Community-based Tourism
CCFU	Cross-Cultural Foundation of Uganda
CEDP	Competitiveness and Enterprise Development Project
CEN/SAD	Community of Sahel-Saharan states
CEMAC	Economic and Monetary Community of Central Africa
CICS	Competitiveness and Investment Climate Strategy (MoFPED)
CITES	Convention on International Trade in Endangered Species
COBE	Census of Business Establishments
COBATI	Community Based Tourism Initiatives
COMESA	Common Market for Eastern and Southern Africa
DFID	Department for International Development (UK)
DMO	Destination Management or Marketing Organisation
DUCAR	District, Urban and Community Access Roads
DWD	Directorate of Water Development
EATWCA	East African Tourism and Wildlife Co-ordination Agency
EAU	Events Association of Uganda
FDI	Foreign Direct Investment
FIT	Foreign Independent Traveller
FTA	Free Trade Area
EAC	East African Community

ECCAS	Economic Community of Central African States
ECOWAS	Economic Community of West African States
EIBTM	European Incentives, Business Travel and Meetings Show (Barcelona)
EU	European Union
FCO	Foreign and Commonwealth Office (UK)
FOUTA	Federation of Ugandan Tourism Associations
GAFTA	Greater Arab Free Trade Area
GMP	General Management Plan
HTTI	Hotel and Tourism Training Institute (Jinja)
IGO	Inter-Governmental Organisation
IMF	International Monetary Fund
ISIC	International Standard Industrial Classification
IBA	Important Bird Areas
ICIEC	Islamic Corporation for the Insurance of Investment and Export Credit
ICOMOS	International Council on Monuments and Sites
ICT	Information and Communications Technology
IGAD	Inter-Governmental Authority on Development
ICCU	Injury Control Centre Uganda
ITB	Internationale Tourismus-Börse (Berlin)
ITC	International Trade Centre
IUCN	International Union for the Conservation of Nature
JATA	Japan Association of Travel Agents Travel Showcase
KAFRED	Kibale Association for Rural and Environmental Development
KCCA	Kampala Capital City Authority
KIU	Kampala International University
KPI	Key Performance Indicator
MDAs	Ministries, Departments and Agencies

MDG	Millennium Development Goals
MFNP	Murchison Falls National Park
MGLSD	Ministry of Gender, Labour and Social Development
MICE	Meetings, Incentive Travel, Conferences and Exhibitions
MIGA	Multilateral Investment Guarantee Agency
MoD	Ministry of Defence
MoFPED	Ministry of Finance, Planning and Economic Development
MoIA	Ministry of Internal Affairs
MoJCA	Ministry of Justice and Constitutional Affairs
MoES	Ministry of Education and Sports
MoLG	Ministry of Local Government
MoTWA	Ministry of Tourism, Wildlife and Antiquities
MoTW	Ministry of Transport and Works
MUBS	Makerere University Business School
MUK	Makerere University Kampala
NCDC	National Curriculum Development Centre
NCHE	National Council for Higher Education
NDP	National Development Plan
NFA	National Forestry Authority
NITA-U	National Information Technology Authority - Uganda
NPA	National Planning Authority
NGO	Non-Governmental Organisation
NP	National Park
NTO	National Tourist Office
NWSC	National Water and Sewerage Corporation
OAU	Organisation of African Unity
OPIC	Overseas Private Investment Corporation
OPM	Office of the Prime Minister
OVI	Objectively Verifiable Indicators
PAMSU	Protected Area Management and Sustainable Use
PEAP	Poverty Eradication Action Plan

PISCES	Personal Identification Secure Comparison and Evaluation System
PMF	Product Market Fit
PRSP	Poverty Reduction Strategy Papers
PSFU	Private Sector Foundation Uganda
PRESTO	Presidential Initiative for Sustainable Tourism
QENP	Queen Elizabeth National Park
RAMSAR	Ramsar Convention (on wetland sites of international importance)
RCDF	Rural Communication Development Fund
RDB	Rwanda Development Board
REA	Rural Electrification Agency
RESP	Rural Electrification Strategies and Plans
RVR	Rift Valley Railways
SACU	South African Customs Union
SADC	Southern African Development Community
SCT	Single Customs Territory
SEO	Search Engine Optimisation
SME	Small and Medium-Size Enterprises
TCC	Tourism Co-ordination Committee
TDA	Tourism Development Area
TDMG	Tourism Development Management Group
TIC	Tourist Information Centre
TIMS	Tourism Information Management System
TSA	Tourism Satellite Account
TTCI	Travel and Tourism Competitiveness Index
TUGATA	The Uganda Association of Travel Agents
UBOS	Uganda Bureau of Statistics
UCC	Uganda College of Commerce
UCOMA	Uganda Community Museums Association
UCOTA	Uganda Community Tourism Association
UDB	Uganda Development Bank
UEMOA	West African Economic and Monetary Union
UGSTDP	Uganda Sustainable Tourism Development Programme
UGX	Ugandan Shillings

UHFTAWU	Uganda Hotels, Food, Tourism and Allied Workers' Union
UHOA	Uganda Hotel Owners Association
UIA	Ugandan Investment Authority
UNDP	United Nations Development Programme
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNRA	Ugandan National Roads Authority
UNWTO	United Nations World Tourism Organization
URA	Uganda Revenue Authority
USAGA	Uganda Safari Guides Association
USAID	United States Agency for International Development
UTA	Uganda Tourism Association
UTADA	Uganda Taxi Drivers Association
UTB	Uganda Tourist Board
UWA	Uganda Wildlife Authority
UWEC	Uganda Wildlife Education Institute
UWRTI	Uganda Wildlife Research and Training Institute
VAT	Value Added Tax
VFR	Visiting Friends and Relatives
WAMZ	West African Monetary Zone
WDA	Workforce Development Authority
WEF	World Economic Forum
WTTC	World Travel and Tourism Council
WTM	World Travel Market (London)
WTO	World Trade Organization
WWF	World Wildlife Fund





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Executive Summary

This Tourism Development Master Plan recognises Uganda's exceptional range of natural and cultural tourism assets and prescribes strategies to unlock their potential which will enable deliver a significant boost to the tourism sector over the next ten years. By 2024, the Master Plan forecasts an increase in foreign receipts to over USD 1.4 billion per annum, and the creation of more than 150,000 additional tourism jobs.

The projection is based on a careful analysis of both internal and external environments of the country. Realising the potential of the tourism sector to contribute to national socioeconomic development, the Government of Uganda has recognised the importance of tourism and identified it as a priority sector in the National Development Plan (2010-15) and the Vision 2040. The Master Plan therefore serves as a ten year guideline on how to enhance the development of not only the tourism sector, but also of the nation in general.

Tourism Overview

International tourism continues to grow above expectations, supporting economic growth in both advanced and emerging economies. In 2013 International tourist arrivals grew by 5% reaching 1,087 million up from 1,035 million - exceeding the projected 3-4% growth rate made at the beginning of 2012 by UNWTO.

Asia Pacific had the highest growth rate followed by Africa, Europe, America and the Middle East. Africa's 6% increase in growth rate attracted 3 million additional international arrivals reaching a new record of 56 million. Sub Saharan destinations have sustained growth 5% growth rate (UNWTO 2013) and the tourism industry is a key socio-economic development driver in the Eastern African region - forming the bulk of foreign exchange earnings and attracting investors (World Bank, 2011).

Over the past decade, Uganda's growth in international arrivals has been growing at an average of 20% per annum, much higher than UNWTO's 5.8% growth rate for the East African region. The international arrivals have

increased from 192,754 in 2000 to 1,196,765 in 2012. Foreign receipts from tourist arrivals in 2012 amounted to USD 834 million (UBOS 2013) and by 2023, this figure is forecast to grow to USD 1.4 billion, based on 6% annual average rate. In 2011 tourism contribution to total Ugandan GDP was USD 1.4 billion (incorporating indirect and induced impacts) and it is expected to exceed USD 2 billion per annum (World Bank, 2012).

In the key high-yield tourist markets, the average total expenditure of leisure tourists on a pre-booked package tour is estimated at USD 1,200 per capita, and that of international business tourists at USD 900, excluding air fares. The forecast growth of these markets is likely therefore to have a substantial impact on receipts in Uganda and it is projected that;

- Attracting 100,000 additional leisure tourists would add 11 per cent to exports and 1.6 per cent to GDP;
- Persuading every tourist to spend one additional night in Uganda would add 7 per cent to exports and 1.0 per cent to GDP.
- 8% annual growth in leisure and conference tourists would generate an additional USD 220 million in receipts per annum. (World Bank survey, 2013).

On the basis of WTTC forecasts, it is estimated that by 2023 some 588,300 persons will be directly employed in the tourism sector, up from 180,900 jobs in 2011. However this will mainly depend on the Master Plan being adequately resourced to include substantial investment in training and up-skilling.

To attain sustained tourism growth, the Master Plan addresses the key aspects of the tourism sector – namely: 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.

For each of the key aspects, detailed analysis of the current situation is conducted, key objectives and targets identified and required strategic interventions elaborated. All these are combined in an implementation framework provides a sector coordination mechanisms and an implementation matrix that highlights the sector key issues, strategic interventions required, performance indicators, responsible agencies, timeframe and budget.

Tourism Planning and Management

In Uganda, the planning and management of the tourism sector is mainly guided by the overall national development framework especially the National Development Plan (NDP) 2010-2015, and Vision 2040. The NDP identifies tourism among the primary growth sectors and proposes a number of strategic interventions to increase the sectors contribution to the countries' socioeconomic development.

Equally Vision 2040, provides a 30 year strategic direction for the country and identifies tourism a one of the sectors with high potential to harness the countries opportunities. At the sectoral level, planning and management of the tourism industry is mainly guided and regulated by a number of policies, laws, regulations and guidelines. Notable of these are; Constitution of the Republic of Uganda (1995), Tourism policy (2014), Tourism Act (2008), Uganda Wildlife Act (2000), Historical Monuments Act (1967), Universities and other Tertiary Institutions Act (2001).

The overall mandate to oversee, monitor and coordinate the tourism sector lies with the Ministry of Tourism, Wildlife and Antiquities (MoTWA). To perform its duties the MoTWA, has an elaborate structure with various departments and implementing agencies that perform a number of roles. Each of the agencies has a designated mandate - Uganda Tourism Board (tourism marketing), Uganda Wildlife Authority (wildlife conservation), Uganda Wildlife Education Centre (environmental education), Uganda Wildlife Training Institute (wildlife conservation training) and the Hotel and Tourism Training Institute (tourism and hospitality training).

However the MoTWA is faced by a number of challenges which include limited funding inadequate staffing and there is lack of clarity between the roles of some departments and the implementing agencies. Although the Local government Act (1997) provides for a multi-tiered decentralised system based at the district (where the local governments have powers to make local

policy, regulations and formulate development plans), there is still limited integration of tourism planning and management in the local government structures. However 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.

The private sector, though still nascent, has increasingly played a big role as the driving force of the sector, working together under an overall umbrella organisation - 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). However 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.

It should be noted that the planning and management of the tourism sector is increasingly being influenced by decisions taken by regional economic blocs. Uganda is a member of East African Community (EAC); Intergovernmental Authority on Development (IGAD); Common Market for Eastern and Southern Africa (COMESA). Within each of these groupings, intra-regional tourism is making an increasingly important contribution to individual members' economies and a number of strategies are being implemented in an effort to achieve sustainable tourism development.

The EAC Strategic Development Strategy 2006-2010 put in place various strategic tourism interventions that have led to achievements such as: marketing East Africa as a single destination; formation of the East African Tourism and Wildlife Coordination Agency; launch of travel magazine; accommodation grading; common tourist visa; and having a Single Customs Territory (SCT). On the other hand IGAD launched a ten year regional sustainable Tourism Master Plan. Despite various achievements, tourism planning and management at regional is still faced with challenges of: limited coordination and mainstreaming of regional tourism strategies in national plans; limited range and uneven quality of tourism products across the member nations; inadequate and inefficient infrastructure; insecurity in some nations; negative publicity in key source markets; and stiff competition from cheaper destinations elsewhere in Africa and beyond.

The strategic interventions suggested by the Master Plan to enhance tourism planning and management include: reviewing the Uganda Tourism Act 2008 to streamline mandates and responsibilities of various departments and agencies; recruit and train more staff; strengthen areas of licensing, registration and tourism statistics collection; explore various means to increase funding to planning and management of the tourism sector; widely consult tourism sector players on the reorganisation of the tourism sector and forming of the Uganda Tourist Authority; review the Historical Monuments Act which is weak and offers limited protection of cultural and historical resources; reorganise and strengthen UTA to clearly provide a unified industry voice; strengthening tourism related bi-lateral and multi-lateral relations with regional member states; creation of awareness of regional tourism development initiatives in Uganda such as the EAC Tourism Protocol, the IGAD Tourism Master Plan; mainstreaming regional tourism plans/agreements in national tourism plans and strengthening existing regional tourism development initiatives – such as the EAC single Visa system.

On overall, the Master Plan proposes a Tourism Development Areas (TDAs) approach as a means to efficiently utilise the vast tourism resources and enhance the levels of tourism planning and management across Uganda. The Master Plan identifies six TDAs distributed across the country. The TDAs are located in the areas of the major established attractions, National Parks and Protected Areas. They are:

- The Central TDA - focuses on Kampala as the capital city and main tourism service hub as well as Entebbe, Ssesse Islands and the Mabira Forest.
- The South-Western TDA - covers Bwindi Impenetrable Forest and Lake Mburo National Parks.
- The North-Western TDA - incorporates Murchison Falls National Park as well as Bugungu and Karuma Wildlife Reserves and the north east shoreline of Lake Albert.
- The Western TDA - covers the central area of Uganda, western frontier, and 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, - lays along the borders of South Sudan and Kenya and it embraces the Kidepo Valley National Park and extends southwards to the

Matheniko and Bokora Wildlife Reserves.

- The South-Eastern TDA - centred on Jinja and covering Mount Elgon National Park. This TDA also incorporates a section of the Victoria Nile as well as the PianUpe Wildlife Reserve.

Within each TDA, it is proposed that a Regional Tourism Hub be designated in one of the major towns and a Regional Tourist Office (RTO) be set up in each hub to guide the development of the TDA and assist local stakeholders in tourism planning and implementation. TDAs and RTOs will be jointly funded by the central government and all the local districts covered, together with local private sector stakeholders who will mainly contribute to RTO marketing initiatives. In order to rationalise resources and avoid unnecessary duplication of activities, it is proposed that MoTWA in collaboration with UTB, and in consultation with local districts, establish a reporting and accountability mechanism.

Tourism Destination Marketing

Tourism marketing in Uganda is mandated by Uganda Tourism Board (UTB) which is responsible for marketing all tourism products and services in the country both internally and outside. Among the functions of UTB is to formulate and implement an international marketing strategy; encourage and promote domestic tourism within the country; encouraging investment in the tourism sector among others.

Uganda has formulated a number of tourism marketing strategies over the years - these include the Marketing Strategy 2004-2008 and the Draft Marketing Strategy 2011-2016. The Marketing Strategy 2004-2008 was guided by the four core elements that included: promoting Uganda as an experiential travel destination; Market prioritisation; Industry partnerships and Customised marketing campaigns. However it was strategy was never fully implemented due to inadequate funding. The Draft Marketing Strategy 2011-2016 was formulated in 2011 to guide the marketing activities of UTB, but was later shelved when the Master Plan formulation process began.

UTB has indulged in a number of marketing activities to promote tourism in Uganda, these include; Publications (i.e. brochures, DVDs: Posters, folders and bags and key holders in the shape of Uganda), participating in trade fairs and exhibitions, organising familiarisation trips, advertising in print and social media, and running a website. However UTB's marketing activities have been

hampered by limited funding over the years which has led to previous strategic plans not being fully implemented. As a result the country faces a poor destination image, and lacks the capacity to undertake marketing research to make informed decisions. The Uganda tourism brand is weak, lacks a clear identity and is barely recognised outside her borders. Uganda as a destination faces further challenges of; inadequate signage to guide visitors to and around tourist attractions, limited travel/tourist maps, inadequate online booking and payment facilities.

The Master Plan proposes a marketing strategy to be adopted in a phased approach to enable markets be approached in an effective and timely manner. The phases are: Phase One - consolidation (focus on the core markets that already come to Uganda and expanding the segments within these markets), Phase Two - Expansion and Diversification (consolidating the markets that were targeted in Phase One and targeting new markets); Phase Three - Sustained growth (emphasis will be on year-on-year targeted marketing actions to include new markets that may not have been tapped or have not been successfully honoured). The plan further considers the different markets that will be targeted - they include tactical markets, domestic market, niche markets, watch list markets and core markets.

The Master plan suggests strategic interventions to improve the marketing of Uganda. They include: engaging PR or Advertising agency in the international market; establishment of a Marketing Advisory Committee; formalisation of funding contributions to UTB's marketing budget by relevant partners; setting up a Tourism Observatory for tourism data collection; upgrading UTB Website; developing a Sales Manual and a Media Kit; set up a public relations (PR) unit at UTB; and establishing a Crisis Management System to counteract negative publicity.

Infrastructure Development

Infrastructure development plays an important role in determining the level of tourism development. For a destination to exploit its resources there is need for appropriate infrastructure in place in terms of a transport network (roads, air water and railway transport), hospitality facilities (accommodation facilities, restaurants) and support infrastructure (power, water, internet, signage).

The Level and quality of infrastructural development also determines level of tourists' satisfaction and

eventually influence choice of destination. The quality and quantity of tourism infrastructure is still inadequate in most parts of the country especially in the rural areas, inspite of a number of programmes to improve on the available infrastructure stock. Roads, which are the major means of transport used in Uganda, provide vital linkages between major tourism areas. Although some major roads to key towns in tourist areas in South and western Uganda are paved, there is a general lack of a comprehensive, integrated and continuous paved road network across the country. Directional signage and rest stops (with clean toilets, food and beverage outlets) are generally lacking on most roads. Within the protected areas (National Parks, wildlife reserves), the Uganda Wildlife Authority (UWA) is responsible for most of the infrastructure including the majority of roads. The condition of the roads in protected areas varies particularly in the rainy season, when most roads deteriorate. However some tourism roads have been identified by government for upgrading.

Air, railway and water transport are all still under developed in Uganda. Out of the approximately 60 licensed airfields, 30 are currently in use (with only 19 having regular services) and Entebbe remains the only International Airport and key entry point for tourists. However, CAA has proposals for the upgrading the airfields especially in principal tourist areas. The Uganda passenger railway service ceased in 1998, although Rift Valley Railways have intentions of reinstating this service beginning with Kampala. There are currently plans to refurbish the existing narrow gauge tracks in Uganda, as well as construct a new standard gauge line, connecting Kenya to Rwanda, Southern Sudan and Congo via Uganda. There are still limited water transport facilities despite 25% of Uganda's surface area being covered by water.

Utilities that are very crucial for tourism development such as power, water, waste management and Information Communication Technology (ICT) are also still inadequate especially in the rural areas. Despite the increasing amount of power generated, it is still inadequate and unequally distributed across the country. Out of the 10 National Parks only five have direct access to the national grid. Tourism destinations which are not connected to the grid have to generate their own supplies from a mix of solar power and generators, which is quite costly - adding to the high costs of doing business. Similarly most tourism establishments, especially in rural areas, do not have piped water so they have to 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. Unlike power and water, there is relatively good mobile phone coverage in most parts of the country, although there are blind spots where there is no signal. There is inadequate ICT network coverage and Internet availability is still very poor particularly in remote areas. However, the National Information Technology Authority Uganda (NITA-U) is currently implementing a backbone infrastructure comprising lying optical fibre cables linking to most district centres.

Although Uganda is relatively well endowed with accommodation and services at the high end, (especially in the National Parks and in the major conurbations such as Kampala and Entebbe), bed numbers are limited and occupancy rates are low. Mid-market accommodation options are still limited and few are considered good value for money. At the budget end, although high occupancy rates are reported, there is demand for more good quality accommodation.

The Tourism master plan recognises the need for an integrated and collective approach to improve access for tourists within Uganda and also improve tourism related facilities and services. In order to improve road access within Uganda the master plan suggests a phased approach: In the short term - the upgrading of the poor quality road infrastructure network particular, the strategic tourist roads linking principal national parks in the west of Uganda; In the medium to long term - completion of a comprehensive paved road network within Uganda particularly in the north and north east of the country to provide a faster and more comfortable vehicular route to key tourist attraction such as Kidepo National Park and Mt Elgon National Park.

To improve on the air mode of tourist transport, the master plan calls for strategic interventions to: improve air transport services by expansion of Entebbe International Airport to increase capacity and improve passenger facilities and services; upgrade some existing airfields to provide international arrival points closer to the tourist regions; and upgrading of domestic airfields to facilitate and create more competitive, frequent wide range and lower cost domestic air services. On Water transport, the plan highlights the need to enhance the frequency, quality and safety speed of water transport services. This strategies suggested include: identification and mapping all navigable water bodies; investigate the potential for water-based tourism activities, tourist circuits and strategic linkages; improving on frequency, quality and speed of passenger and vehicle ferry services

across short distances; monitoring and regulating water transport providers to enhance tourists safety; and making water transport attractive for private investment. The plan also suggests for a liaison and discussions between MoTWA and MoWT to explore the opportunities to integrating tourism-based passenger services with new or refurbished rail lines.

To improve on the bed numbers and occupancy rates (especially in National Parks) and making mid-market accommodation options available, a number of strategic interventions are suggested and they include: encouraging and supporting investment in accommodation sector (especially in the mid-range and budget) in key tourism areas; encouraging establishment of homestays and hostels as alternative accommodation options; enforcing service and accommodation standards regulations; attract and ensure well planned accommodation facilities near tourism destinations such as National Parks; ensure building standards are followed to ensure safety of the tourists; promote use of unique and indigenous building materials and interior designs; identify potential locations and construct modern conference and exhibition facilities within the six Tourism Development zones.

Since the availability and quality of power, water, ICT, visitor information and waste management facilities are very crucial in determining visitor satisfaction and destination choice. The master plan cognisant of the prevailing situation, proposes a number of strategic interventions which include: expand on-grid power supply to rural areas through the Rural Electrification programme; promote use of renewable sources of energy even in areas with access to on-grid power; ensure adequate mobile phone coverage and internet (wi-fi hotspots) at key tourist locations (especially in rural areas) through the Rural Communications Development Fund (RCDF); provide incentives for private sector to invest in rural water provision; establish regional Tourist Information Centres (TICs) and improve signage especially TDAs.

Conservation of Natural and Cultural Heritage

Natural and cultural heritage is very significant to the tourism industry, since it forms the resource base from which different tourist products are developed. Uganda has an exceptional quality of natural attractions ranging from rich and diverse wildlife to a vast array of landscapes with incredible aesthetic beauty. In an effort to conserve this rich natural heritage, 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. Currently approximately 650 designated cultural heritage sites and monuments that have been identified by the department of Museums and Monuments as being of significant value. Out of these, a total of 56 sites have been identified as being of national significance and require urgent conservation. Apart from being identified, most of the sites are not mapped and documented. They include: historic sites and buildings (such as churches, cathedrals, mosques, monuments, forts and tombs, slave trade routes, explorer routes); archaeological sites (including rock paintings, stone age settlements and earthworks); traditional shrines, ritual sites and caves.

Although a number of protected areas, monuments and cultural heritage sites have been established, they are mainly faced with challenge of ensuring that they are sustainably utilised and managed. Over the years a number of protected areas have faced human-wildlife conflicts (such as poaching) and cultural heritage sites degraded. This has been a result of limited institutional capacity (both at local and central government level) to manage wildlife conflicts and limited training and research in natural heritage monitoring, management and conservation. More so, the increasing population and the competing land uses are increasingly threatening heritage resources both within and outside protected areas. The current concern is mainly hinged on the oil and gas exploration in ecologically sensitive protected areas and construction of H.E.P dams along rivers which have a number of tourism resources and products.

The situation has been compounded either the weak laws or the inadequate implementation of the existing laws to conserve the heritage resources. For instance the current law on Museums and Monuments is weak and cannot adequately prevent the vandalizing of cultural sites and monuments, or prevent illicit trafficking of antiques and encroachment on cultural land. The

inadequate implementation of the conservation laws have resulted in loss of habitat, human-wildlife conflicts, illegal trade in wildlife and antiques. Apart from the above heritage conservation is generally constrained by inadequate skilled human resource and limited funding of conservation programmes.

In order to overcome these challenges a number of strategic interventions are proposed by the Master Plan and they include: engage government for political support and good will in protecting heritage resources; review and strengthen the regulatory framework and enforce existing conservation laws and regulations; increase public awareness and strengthen community conservation initiatives; clearly marking and securing all natural and cultural heritage sites such as National Parks and monuments; regularly inspect conservation areas/sites to ensure sustainable management of the resources; increase financial resources to the conservation agencies; build capacity of private sector and local communities to be involved and invest in conservation; strengthen implementation of bi/multilateral conservation agreements as a means of promoting of trans boundary conservation; strengthen adherence and observation of international conservation conventions and treaties; put in place measures to mitigate human-wildlife conflicts; enhance and support conservation research and training through collaborating with universities and other research institutions.

Product development

Though Uganda is blessed with a diversity of tourism products, it is majorly known for nature based products particularly wildlife especially the iconic mountain gorilla. The other products such as cultural, historical and MICE products do not play a remarkable role in the present products offer. Uganda's product development faces various challenges which include: over reliance on wildlife products; limited accessibility to destinations; inadequate MICE venues; unconducive investment environment; unplanned development challenges; limited skills in tourism product innovation; and competing land uses – which lead to lose products to other economic development activities such as hydroelectric dam construction, agriculture among others.

In order to build a strong, coordinated and sustained product development base, the Master Plan identifies tourism products in given Tourism Development Areas (TDAs) across the country based on the unique characteristics of each region. A number of conceptual

flagship projects have been proposed under which a number of tourism products will be developed. They include; The Kampala Tourism Circuit, The Kampala Exhibition and Conference Centre, Source of the Nile Site, Nile Adventure Trail, Murchison Falls Site Visitor Facilities, National Park Visitors Centres.

The Master Plan proposes a three phase product development approach that focuses on: Phase one - Consolidation (strengthening the products in established TDAs and improve access), Phase Two - Expansion and Diversification Phase (Investing in new products in core TDAs, creating new tourist routes, opening new emerging markets); Three - Sustained growth (creating new TDAs and expanding the product range).

The Master Plan further recognises the need to enhance, diversify and develop tourism products in Uganda, and proposes a number of strategies which include: develop a national product development strategy; improve and diversify existing tourism products; improve product branding and packaging; mobilise funding for product development; and support regional tourism clusters.

Human Resource Development

Human Resource Development (HRD) in tourism is a fundamental part of the enabling environment. The tourism sector cannot reach its full potential without well trained, educated and motivated human resource that can develop effective policies, plan, manage, market and deliver quality products and services to visitors. Achieving a strong human resources base for the sector requires concerted efforts and investments in education, training and continuous professional development.

Tourism human resource development activities in Uganda are carried out by a wide range of stakeholders, including several government agencies, private tourism education and training institutions, professional associations and individual employers. Each of these makes an important contribution to the overall development of tourism human resources. Public and private sector stakeholders are unanimous in their view that weak human resources capacity is one of the tourism sector's most serious constraints in Uganda. Although there are no major quantitative shortages of labour supply in the Ugandan tourism sector, there are serious qualitative skill shortages. Skill levels are generally low, resulting in poor, slow and unprofessional service delivery. This is detrimental to service quality,

productivity and competitiveness. The apparent skill gaps result in the recruitment of foreign labour, particularly for supervisory and managerial jobs and at higher end establishments. On the other hand, Ugandan employees with experience tend to seek employment abroad in search of higher salaries and this further contributes to the skill deficiency. Uganda currently has over 30 institutions delivering tourism and hospitality education and training at various levels.

Tourism education institutions are categorized as universities, business schools, vocational institutes, and tourism and hospitality training schools. The qualifications offered range from to Certificate to Post graduate levels in areas of hospitality management, tourism management, wildlife management, tour and travel, food and beverage service. However, the existing curricular in most public and private institutions is not regularly reviewed to meet the sector needs. The curricular is mostly skewed towards general theoretical tourism and hospitality education and training which is exacerbated by the lack of practical training facilities. Curriculum modernisation is hampered by training institutions' shortcomings and inexperience, lack of exposure to international best practice and by the limited access to international textbooks and other teaching and learning materials. Due to the dominance of SMEs and family-owned businesses in the sector, the culture of training and continuous professional development by companies is weak. Although professional associations conduct training workshops for their members, the current provision is still insufficient to substantially raise the skill levels in the sector. Professional development courses in specialist, niche and emerging areas such as event management, eco-tourism, adventure tourism, faith based tourism etc. are not readily available.

The Master Plan proposes the adoption of a strategic approach to tourism HRD that will raise the quality of tourism product and service delivery in Uganda, as well as raise the standard and competitiveness of the tourism sector. The strategy is based on building strong public-private partnerships and strengthening cooperation between the tourism education/training sector and the tourism industry. It simultaneously focuses on three areas: strengthening continuous professional development for current tourism sector employees; strengthening existing tourism education and training institutions and programmes; and developing new tourism education and training institutions and programmes.

To fulfil these objectives, the Master Plan proposes establishment of a Tourism Human Resources Development Advisory Committee. The committee will among other things hold a public tourism awareness campaigns targeting three distinct set of audiences: general public; development partners and policymakers; and School children. The Tourism HRD Advisory Committee will also spearhead capacity building and awareness workshops for administrators and teachers in schools to raise awareness about the tourism sector and to train them to plan and execute awareness campaigns and organise fieldtrips to tourism sites. The Master Plan also proposes formation of a Tourism Curriculum Committee. This committee will map the existing curriculum and prepare Subject Benchmark Statements that will serve as a source of reference for higher education institutions when designing new programmes of study in tourism and will guide them when setting the learning outcomes associated with the programmes. On the basis of the review, the committee will propose necessary curriculum changes and developments.

The plan further suggests the setting up of Tourism Research Centres at Makerere University and Makerere University Business School that will act as a driver of academic and industry related tourism research in Uganda. The Centres will also engage in international collaborative research projects. The centres will collaborate with the Uganda Wildlife Training Institute and HTTI on wildlife, tourism and hospitality related research projects respectively.

Regarding Quality assurance, the National Council for Higher Education working closely with MoTWA and the Uganda Tourist Board will conduct monitoring, registration and accreditation of institutions and programmes. Makerere University, Makerere University Business School and HTTI are identified to be the first institutions to seek UNWTO.TedQual Certification.

Tourism Financing and Investment

The sustained growth of the tourism sector is wholly dependent on the adequate level of funding for the various tourism strategies and programmes. The current funding arrangements for the tourism sector are inadequate in relation to the responsibilities to fulfilled. The tourism sector is majorly funded by the government and development partners however government funding has been limited due to budgetary constraints and donor funding has been based on short term programmes.

Despite the macro-economic stability and a range of tourism investment incentives instituted by government there is still limited investment in tourism sector. The incentive strategies put in place have not been sufficiently pro-active and therefore a more concerted and targeted programme of financing and investment promotion needs to be devised and implemented.

Investment in tourism by the private sector has been inhibited by lengthy bureaucratic procedures that affect business operations and competitiveness. Therefore there is need for de-regulation and simplification of procedures in order to increase compliance and attract investment in the sector. There is need to bridge the funding gap relating to tourism product development, marketing, training and education.

In order to bridge the financing and investment gap, the plan proposes a number of strategies that include: strengthening a Tourism Sector Working Group; implement the Tourism Development levy; coordinating and stimulating Investment by giving investors the degree of confidence and reassurance that their investment is secure and will gain their projected return on investment within the anticipated timeframe; and exploring opportunities for public-private partnerships (PPPs) to finance tourism programmes.

In the short and medium-terms strategies need to be put in place to mobilise investment funds from various sources, including: hosting major investment forums; mobilise Ugandans in the Diaspora to invest in tourism; establish or utilize state-owned Sovereign Wealth Funds (SWFs) for tourism investment; create special economic tourism zones; encourage wealthy individuals (commonly called Business Angels) take equity in a tourism-related business to provide seed finance, business and financial management advice; and encourage and support Investment Clubs - a means for individuals to group together, and share expertise and risk.

Tourist Safety and Security

Tourism being a fragile sector, it is extremely sensitive to the impact of safety and security issues. The recent terrorist attacks in the Eastern African region and their repercussions for the travel and leisure industries have led to more focus on tourist safety and security. In Uganda, the country still suffers from widespread negative perceptions of insecurity dating as far back as the Amin years.

To improve on the security of the tourists, a Tourism Police was formed with a primary function is to enhance security at National Parks, wildlife reserves, hotels and other tourist destinations across Uganda. These complement the Uganda Wildlife Rangers that already operate within the protected areas - however they need a tourism-specific training to meet the sector needs.

The Master Plan recognises the need for tourist safety and proposes strategic interventions which include: formulate a security and safety action plan for tourism; support the Tourism Police; improve national and international coordination between security agencies; enhance security awareness/preparedness at tourist establishments; enforce transport laws and regulations to reduce accidents; establish a well-equipped Emergence Response Centre for tourism with a clear communication, command and control structure; ensure actor's adherence to safety requirements with constant monitoring and supervision through umbrella trade associations.

Private Sector Capacity Development

The tourism industry in Uganda is public sector led and private sector driven which implies that the private sector plays a significant role in the running of the tourism business in the country. The private sector includes different trade tourism associations headed by an umbrella association - Uganda Tourism Association (UTA). The membership to UTA includes USAGA, UHOA, AUTO, UCOTA and TUGATA.

However these associations are faced by a number of challenges which include: limited support from the government; weak human resources capacity; inadequate coordination of all sector players; limited business managerial skills; and limited coherence within individual associations. In general the private sector representative bodies are generally under-resourced and most of them lack strong executive support and coordinated efforts.

To address these issues the Master Plan proposes strategic interventions of: provide support to UTA; improve communication between government and private sector; provide affordable credit and financing arrangements; promote continuous professional development programmes; provide subsidized business development services for tourism private sector; and strengthen self-regulation mechanisms.

Community Tourism Development

Properly planned and well-managed community based tourism can bring substantial benefits to a community and its residents. In Uganda, community-based tourism initiatives and related activities have been established for many years. There are two main associations focused on supporting communities in their tourism initiatives and enterprises: the Uganda Community Tourism Association (UCOTA) and the Community Based Tourism Initiative (COBATI).

Various organisations such as UWA, NFA and number of donors and individual enterprises support a number of community tourism initiatives across the country.

Whilst community-based tourism is well established in Uganda and can demonstrate several success stories, its growth and sustainability is hampered by a number of constraints, mainly: limited financial support from government; over reliance on donor funding; inadequate financial and business management skills within community organisations; and high turnover of members.

The Master Plan proposes strategic interventions, which include: build communities capacities in product development and diversification; enhance business management and entrepreneurial skills training; establish a framework for private sector-community collaboration; increase funding for community tourism activities; and strengthen umbrella community associations.

Implementation Framework

The Master Plan highlights the implementation arrangements, sector coordination and the implementation matrix. Implementation will be through the existing institutional structures of MoTWA and the agencies (UTB, UWA, UWEC, HTTI, UWTI and the Department of Monuments and museums) whose roles have been clearly identified. The plan recognizes the multi sectoral dimension of the tourism industry and focuses on mainstreaming and empowering the key sectors to build the synergies and actions that will develop and impact tourism along its value chain.

In pursuit of this goal, the sector will actively engage and empower the existing structures of policy formulation (Cabinet and Parliament) and policy implementation (Ministry and Agencies). To further enhance coordination and engagement the sector will create and promote the

development of new governance and service delivery structures (Tourism Coordination Committee, Tourism Sector Working Group, Tourism Development Areas and Tourism Private Sector Associations).

The Master Plan provides a systematic implementation matrix detailing the key issues, the strategic interventions, key performance indicators, time framework and the responsible stakeholders.

Definition of Key terms

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 traveller who takes a trip to a destination outside his/her usual environment for any main purpose (leisure, business or other personal reason), other than for his/her regular employment, and returns on the same day.

A Tourist

A tourist is a visitor whose trip includes an overnight stay but lasts no longer than one year (a tourist may be a domestic traveller or international visitor).

Country of residence

The country of residence of a household is determined according to the centre of predominant economic interest of its members. If a person resides (or intends to reside) for more than one year in a given country and has there his/her centre of economic interest (for example, where the predominant amount of time is spent), he/she is considered as a resident of this country.

Destination

The main destination is defined as the place visited that is central to the decision to take the trip. See also purpose of a tourism trip.

Domestic tourism

Comprises the activities of a resident visitor within the country of reference, either as part of a domestic tourism trip or part of an outbound tourism trip.

International tourism

International tourism comprises inbound tourism plus outbound tourism, that is to say, the activities of resident visitors outside the country of reference, either as part of domestic or outbound tourism trips and the activities of non-resident visitors within the country of reference on inbound tourism trips.

Tourism expenditure

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, for and during tourism trips.

Tourism Satellite Account (TSA)

TSA is a set of 10 summary tables, each with their underlying data and representing a different aspect of the economic data relative to tourism: inbound, domestic tourism and outbound tourism expenditure, internal tourism expenditure, production accounts of tourism industries, the Gross Value Added (GVA) and Gross Domestic Product (GDP) attributable to tourism demand, employment, investment, government consumption, and non-monetary indicators.

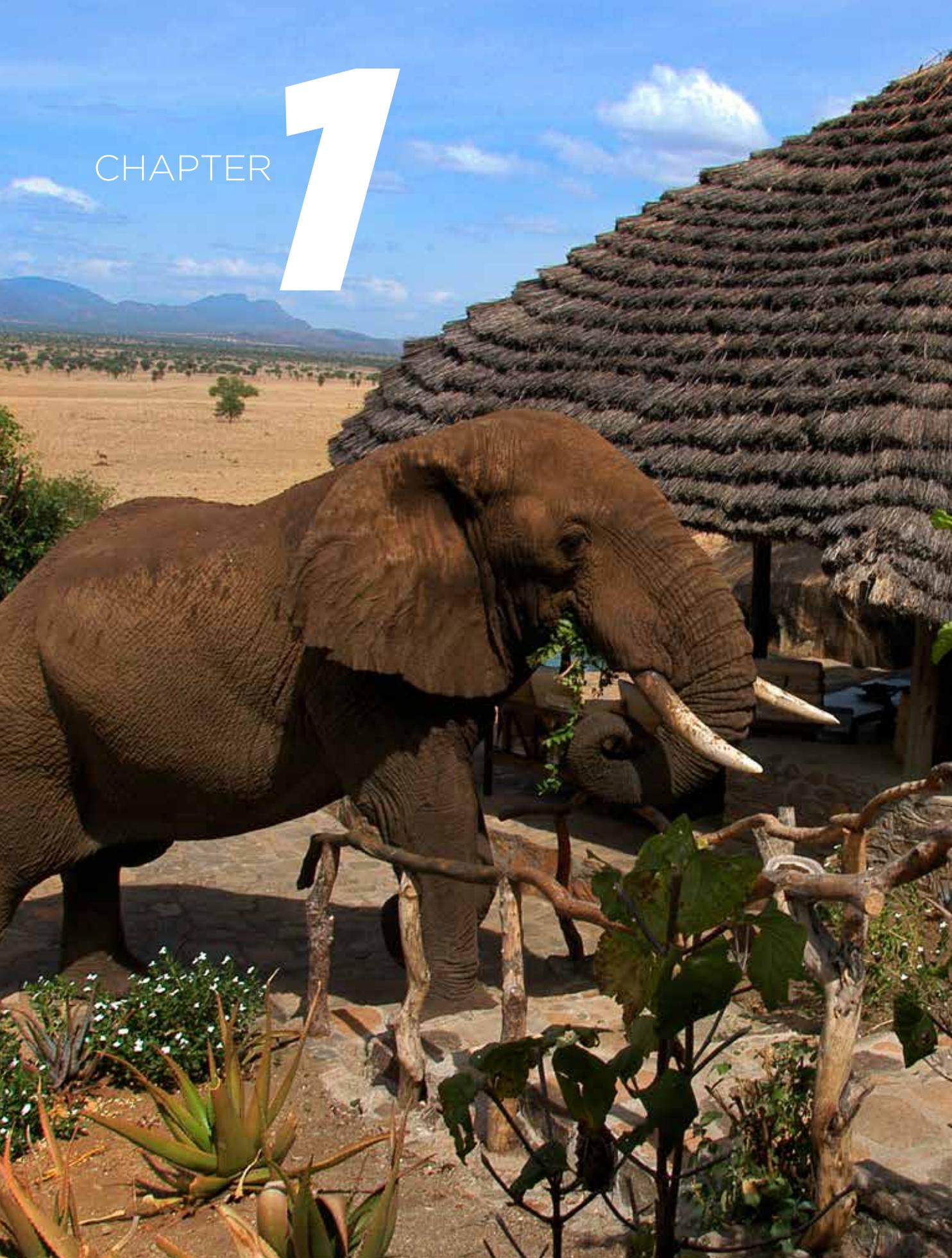
Tourism sector

The tourism sector, as contemplated in the TSA, is the cluster of production units in different industries that provide consumption goods and services demanded by visitors.



CHAPTER

1



1. Introduction

1.1 Background

Uganda is a country of exceptional beauty, located in the heart of Africa. It is a landlocked country, located in East Africa, bordered by Kenya, Tanzania, Rwanda, the Democratic Republic of Congo and South Sudan. Uganda lies in the Nile basin and western ridges of the Great East African Rift Valley. The greater part of the country sits on a plateau at an altitude of more than 1,000m, and enjoys a temperate equatorial climate (day-time temperatures vary between 20° and 27°C) ideally suited to both agriculture and tourism.

Measuring 236,040 sq km, Uganda is home of the official Source of the Nile that flows out of Lake Victoria, the largest lake in Africa. 25% of the surface of the country's surface area is covered by water. Freshwater lakes, crater lakes and rivers are a prominent feature of the mostly flat landscape, and include Lakes Albert, Edward and George in the west, the vast and marshy Lake Kyoga in the centre, and one of the deepest lakes in the world, Lake Bunyonyi, in the south-west.

On the eastern and western borders of the country rise some of the continent's highest mountains, notably the Rwenzoris, the highest mountain range in Africa (the third highest mountain in Africa named the Mountains of the Moon in the 2nd century AD by the Greco-Roman writer Ptolemy, and topped with Margherita Peak, at 5,109m). The volcanic Virungas (the habitat of the iconic mountain gorillas), shared with Rwanda and DRC, and Mount Elgon, a supposedly extinct volcanic peak on the border of Kenya, also rise to over 4,000m.

In 2012, Uganda's population numbered more than 34 million (Uganda Census, UBOS 2012), of whom approximately 13% are urban and 87% rural dwellers. The population has more than doubled since 1991 (16.7M). Uganda is one of the world's developing countries, ranking 161st out of 187 countries in 2011 on the UNDP's Human Development Index (HDI). Between 1985 and 2012, its HDI value has been growing at an annual average rate of 1.6% (Human Development Report, UNDP 2013). In 2011, Gross National Income per capita was USD510 (Uganda at a Glance, World Bank 2013).

Previously dominated by agriculture (major exports being coffee, tea and tobacco), the economy is increasingly reliant on the fast-growing services sector (51%, of which tourism is the main component), and oil and minerals extraction sector (Uganda at a Glance, World Bank 2013). Nevertheless, over 80% of Ugandans are subsistence farmers or employed in agriculture-related activities.

The majority of the population inhabit the central, southern and western regions of the country, the most populous ethnic group being the Baganda (20% of the total), centred around the capital Kampala. Other major ethnic groups are the Banyankole, Batooro, Banyoro and Busoga. The ancient Kingdoms that constitute modern Uganda (Buganda,

In the Eastern African region, the tourism industry is the key driver for socio-economic development, a major source of foreign exchange earnings and it continues to attract investors in the region

Toro and Bunyoro) and clan loyalty are important elements of the country's cultural identity. The official language is English, while Luganda, a Bantu language, is the most widely spoken of many indigenous languages.

The largest urban area is the fast-growing Kampala capital city (approx. population of 1.5 Million) together with the nearby former capital Entebbe. Other significant population centres are Jinja, Gulu, Lira, Mbale, Mbarara, Masaka, Kasese, Mukono, Fort Portal, Arua among others.

Following independence from British colonial administration in 1962, Uganda experienced a period of severe turbulence, although political stability and security have now returned. In 1971, power was seized from President Obote by Idi Amin, leading to fifteen years of civil conflict, with Amin in turn being overthrown in 1979. Obote himself was then ousted in 1985, and replaced by the current President Yoweri Kaguta Museveni in 1986. Uganda's Parliament is formed of a National Assembly that comprises 322 members, of whom 104 are nominated by special interest groups and the remainder elected every five years. Local administration is devolved to 112 districts.

Uganda is a member of the East Africa Community (EAC), Inter-Governmental Authority on Development (IGAD), Common Market for Eastern and Southern Africa (COMESA) and is a member to a number of international organisations including United Nations World Tourism Organisation, UNWTO. It is also a signatory to a number of international treaties and conventions.

1.2 Tourism overview

1.2.1 Global and Regional overview

International tourism continues to grow above expectations supporting economic growth in both advanced and emerging economies, bringing the much needed support to Job creation, Gross Domestic Product (GDP) and the Balance Of Payments of many destinations. In 2013 International tourist arrivals grew by 5% reaching 1,087 million up from 1,035 million exceeding the projections of 3-4% growth made at the beginning of 2012 by UNWTO.

In terms of regional tourism growth Asia Pacific had the highest growth rate followed by Africa, Europe, America and the Middle East. Europe had an increased growth of 5% with an additional 29 million international tourist arrivals in 2013 rising to a total of 563 million. Africa's 6% increase in growth rate attracted 3 million additional international arrivals reaching a new record of 56 million reflecting the on-going rebound in North Africa (+6%) and the sustained growth of Sub Saharan destinations (+5%). The increased demand indicates a health growth for the tourism sector. Therefore countries in the African continent (including Uganda) whose economy depends on the tourism industry need to reposition themselves in order to tap into the increasing tourism market.

In the Sub-Saharan region international arrivals have increased from 16 million in 2000 to 36 million in 2013 (UNWTO 2013). In the Eastern African region, the tourism industry is the key driver for socio-economic development, a major source of foreign exchange earnings and it continues to attract investors in the region (World Bank, 2011) Owing to the importance of tourism in the region, the MoTWA with support from UNDP has formulated a Tourism Master Plan to guide tourism development with a vision of making Uganda, Africa's top tourism destination in the next ten years.

1.2.2 National overview

Tourism Arrivals

Over the past decade, Uganda's growth in international arrivals has been growing at an average of 20% per annum, much higher than UNWTO's 5.8% growth rate for the East African region. The international arrivals have increased from 192,754 in 2000 to 1,196,765 in 2012 (UBOS 2013, UNWTO, 2013). Of the total number of international arrivals in 2011, nearly 60% declared their main purpose of visit to be Visiting Friends and Relatives (World Bank: TEMS, 2013). Research by the World Bank and the UNWTO Project Team indicate that these arrivals are most likely to be frequent cross-border trips made by East African nationals with family or homes in Uganda, who contribute comparatively little to the tourism economy since many appear to conduct same-day trips.

Expenditure and revenues

Foreign receipts from tourist arrivals in 2012 amounted to USD 834 million (UBOS 2013). By 2023, this figure is forecast to grow to USD 1.4 billion, on the basis of an annual average rate of increase of 6%, similar to the estimated growth rate in visitor arrivals. The total contribution to GDP can be expected to exceed USD 2 billion per annum (World Bank, 2012).

In the key high-yield tourist markets, the average total expenditure of leisure tourists on a pre-booked package tour is estimated at USD 1,200 per capita, and that of international business tourists at USD 900, excluding air fares (World Bank survey, 2013).

The forecast growth of these markets is likely therefore to have a substantial impact on receipts in Uganda as indicated below.

- | |
|---|
| • Attracting 100,000 additional leisure tourists would add 11 percent to exports and 1.6 per cent to GDP; |
| • Persuading every tourist to spend one additional night in Uganda would add 7 per cent to exports and 1.0 per cent to GDP. |
| • 8% annual growth in leisure and conference tourists would generate an additional USD 220 million in receipts per annum. |

Tourism Employment

The World Travel & Tourism Council (WTTC) estimates that in 2011 tourism was directly responsible for 180,900 jobs, and the figure rises to a total of 447,400 jobs when factoring in jobs indirectly supported by the industry. These figures represent 2.7% and 6.6% of the Uganda workforce, respectively. But over the seven years to 2011, direct employment only increased by a total of 12.6%, with an even smaller figure of 8.8% for total employment (Uganda Tourism Assessment, World Bank, 2012).

On the basis of WTTC forecasts, it is estimated that by 2023 some 588,300 persons will be directly employed in the tourism sector. Provided that implementation of the Master Plan is adequately resourced, to include substantial investment in training and up-skilling, it is also estimated that an additional 151,400 direct jobs will have been created across the country.

The projections in Scenario 1 (Table 1.1), based on WTTC calculations, foresee the creation of an additional 72,200 tourism jobs by 2023, and total employment of 271,500 in the tourism sector. Projections in Scenario 2 use the UNWTO estimated

international arrivals growth rate of 5.8% for the East Africa region, and forecast that by 2023 the tourism sector will employ a total of 350,600 representing the creation of an additional 171,300 jobs.

Table: 1. 1 Tourism Employment Projections (2012-2023)

	Scenario 1 WTTC forecasts	Scenario 1 WTTC estimated % changes p.a.	Scenario 2 Average 5.8% growth per annum
2012	199,300		199,300
2013	200,200	0.4	210,900
2014	205,600	2.7	223,100
2015	209,000	1.6	236,000
2016	212,400	1.6	249,700
2017	218,600	2.9	264,200
2018	225,400	3.1	279,500
2019	233,600	3.6	295,700
2020	242,500	3.7	312,900
2021	251,100	3.5	331,000
2022	261,300	4	350,200
2023	271,500	3.9	370,600

Source: WTTC Forecast and UNWTO Project Team calculations on 2012 base

Basing on the above contributions, the Government of Uganda recognised the importance of tourism to national socioeconomic development and it has identified it as a priority sector in the National Development Plan 2010-2015.

1.2.3 Tourism Resource base

Uganda is blessed with a quite exceptional abundance of natural, cultural heritage and historical resources that ought to be the platform for a flourishing tourism sector. It is the only country in the world where the Big Five and the mountain gorillas can be seen, it has the biggest variety of bird species in Africa, the highest mountain range, the biggest lake, the official Source of the Nile, numerous wildlife parks and forest reserves, some fascinating cultural heritage and history, complemented by an attractive climate that allows tourism all year round and an exceptionally friendly and hospitable people.

In the 1960s Uganda was the leading safari destination in Africa. Uganda's wildlife National Parks are still recovering from the devastation they suffered in the years of civil conflict in the 1970s and 1980s when animal populations were decimated. However the population has steadily improved due to the good conservation environment. The country has over 40 protected areas among of which are 10 national parks. In terms of tourist's visitation Queen Elizabeth and Murchison Falls NPs are the most visited park however Bwindi Impenetrable NP is mostly known for its iconic product the mountain gorillas.

Queen Elizabeth and Murchison Falls NPs offer excellent and distinctive wildlife experiences - boat cruises along the Kazinga Channel and Nile respectively - that are not available in neighbouring competitor destinations. Other National Parks and Protected

Areas, including Kidepo Valley, Semliki, Kibale and Mabira Forest, offer excellent potential for bird-watching, eco-tourism and adventure activities that can generate employment and wealth-creating opportunities for marginalised communities, with the help of specialist training.

Uganda's lakes, rivers and mountains are other tourism resources that are available for tourist exploitation. The Nile and its iconic Source of the Nile is a renowned site for rafting and adventure sports. The attractive islands of Lake Victoria though inadequately served by ferry or air transport are a potential to weekend leisure destinations, particularly for the domestic market.

The beautiful Lake Bunyonyi and other big freshwater and crater lakes offer excellent opportunities for cruises, water-sports, lakeside activities and relaxation. The Mountains of the Moon (Rwenzori's) one of the Ramsar sites offer mountaineering services for the mountain climbers. The mountain offers snow-capped peaks on the Equator (few countries can offer this) and has such a remarkable range of exotic flora and fauna. Mount Elgon and the Virungas are also attractive destinations for hiking and climbing.

Uganda has a rich, diverse cultural heritage and fascinating history that is not fully developed for tourism purposes. The range and quality of native crafts though not fully developed complement the other tourism products. The Kingdoms, Victorian-era explorers, recent history including Idi Amin, the built and intangible heritage and archaeological remains all offer opportunities for telling stories, creating experiences and staging performances that are noticeable only by their absence. If adapted for tourism uses restored colonial-era buildings hold a strong appeal for high-spending foreign visitors, as can be seen in many destinations across the Commonwealth.

In general the potential for tourism offered by Uganda's natural and cultural resources is exceptional and if well planned and developed, it will be one of the key foundations of a sustainable tourism economy.

1.2.4 Tourism Sector Organisation

The tourism sector in Uganda mainly public sector led and private sector driven. The Government of Uganda recognises the importance of tourism to the Ugandan economy, by its actions in creating a stand-alone Ministry of Tourism, Wildlife and Antiquities (MoTWA) in 2011 and by identifying tourism as a priority growth sector in the National Development Plan for 2010/11 – 2014/15. The ministry as the lead public sector organ is responsible for formulation of tourism policies to guide the development of the sector.

The ministry is also responsible for the supervision, monitoring and coordination of the sector. In the execution of its mandate the MoTWA works through a number of Departments, Institutes and Agencies. The departments include: Tourism Development; Wildlife Conservation; Museums, Monuments and Antiquities.

The institutes are Hotel and Tourism Training Institute (HTTI) and Uganda Wildlife Training Institute (UWTI) responsible for the human resource development. The agencies are; Uganda Tourism Board (UTB), Uganda Wildlife Authority (UWA) and Uganda Wildlife Education Centre (UWEC). MoTWA also collaborates with other Ministries, Departments and Agencies in the promotion and development of tourism. The management of tourism enterprises are mainly private sector driven. Over the time, the key sub sectors of the tourism industry have formed associations for advocacy and support of common developmental aspirations. The key tourism trade associations

tourism is
Uganda's single
largest export
earner and
generator of
foreign exchange,
at USD 812
million per
annum

are Uganda Hotel Owners Association (UHOA), Association of Uganda Tour Operators (AUTO), Uganda Travel Agents Association (TUGATA), Uganda Safari Guides association (USAGA), Uganda Community Tourism Association (UCOTA). These trade associations are enjoined by an umbrella association - Uganda Tourism Association (UTA).

1.3 The Context

1.3.1 Introduction

The current state of the tourism economy in Uganda needs to be properly understood in order to set realistic targets for growth and formulate a development strategy that will deliver that growth. The last ten year Integrated Tourism Master Plan for the country was developed in 1993 while the five year tourism policy was developed in 2003.

These two development guiding frameworks for the development of the tourism sector were surpassed by the dynamic and fast paced industry in terms of growth projections and the structure of the industry. In order to further enhance and sustain the current tourism development momentum, the need for a comprehensive Tourism Master Plan is justified.

1.3.2 Rationale of the Tourism Master Plan

Globally and in Uganda, the statistics give credence to the increasing importance of tourism in the social economic transformation of nations. With careful planning and commitment of resources, the tourism sector has a potential to greatly contribute to the strengthening of the fundamentals of the economy to enable the country harness her abundant opportunities.

Although the sector is recognised in the National Development Plan as one of the fastest growing service sector of the economy and a major foreign exchange earner, there has been limited strategic planning and investment. The sector has not been fully mainstreamed in all sectors of government activities to harness the multi sectoral dimensions of the industry.

The case for intensifying and increasing Government support for the tourism sector is as compelling as it is self-evident based on key socio-economic and environmental indicators which justify increased government support to the sector. The tourism sector is making significant contribution to the economy as indicated below.

Export earnings: from a balance of trade perspective, tourism is Uganda's single largest export earner and generator of foreign exchange, at USD 812 million per annum (UBOS, 2012). This represents more than twice the earnings of coffee, the country's second biggest export.

Employment: being a labour intensive industry, tourism employs directly 200,000 people (WTTC, 2012) and provides employment for an additional 284,000 (UBOS, 2012), indirectly and induced. Tourism, in comparison to other economic sectors, has the strongest multiplier effect and job creation capacity.

Economic transformation and inclusive growth: in progressing to a modern, middle income economy, tourism makes a highly significant contribution to achieving the Millennium Development Goals in Uganda, especially with regard to MDG1 – Poverty Eradication; MDG3 – Gender Equality and Women Empowerment; MDG7 – Environmental Sustainability. These are mainly being achieved through direct and indirect employment in the sector and through related value-chain linkages.

Investment promotion: tourism development projects generate significant flows of FDI into the Ugandan economy. According to the Bank of Uganda, investment in the hospitality industry alone (accommodation, food and beverage services) reached USD 141 million in 2011.

Tax base: widening the country's tax base is especially important in implementing the social and economic policies as planned by the Government. Whatever tourists' main motivation for visiting Uganda (leisure, business, meetings, visiting friends and relatives etc.), they are effectively imported tax payers, who are tax compliant. The direct result of increases in tourist visits is a widening of the tax base and tax receipts. According to the World Bank calculations in 2013, attracting 100,000 additional leisure tourists would add 11 percent to exports and 1.6 percent to GDP and an 8% annual growth in leisure and conference tourists would generate an additional USD 220 million in receipts per annum. Based on evidence from other tourism economies, it can be assumed that between 20 to 30% of total tourism revenues accrues to the Government

Cultural and environmental factors: tourism has wider benefits, beyond the economic impacts. Tourism justifies and supports the preservation of customs and other traditional cultural expressions, whilst also acting to conserve the natural environment by placing a higher economic value on its preservation.

Competitiveness: tourism is a hugely competitive international industry; with ever more destinations fighting to increase their market share. Uganda also faces a particular challenge stemming from its geographical proximity to larger better-known competitors who offer similar products. Therefore, this calls for increased planning and support for the country to become highly competitive.

In general, based on the above contributions, it is evident that tourism is a pivotal pillar of the Ugandan economy. Strengthening that pillar by availing the necessary financial, human and technical resources, can only serve to support and boost Uganda's overall development.

Therefore the formulation of the Tourism Master plan is not only important for the development of the tourism sector but also for contributing to the attainment of the Millennium Development Goals (MDGs), achievement of the targets expounded in the National Development Plan (NDP) 2010-2015 and enabling the country realise its vision of transforming from a peasant to a modern and prosperous country, as stated in Vision 2040.

1.3.3 Format and Approach of the Master Plan

The Master Plan is divided into four chapters

- **Chapter One:** Introduction - explains tourism over view (both global and national), tourism resource base, and tourism sector organisation. It also highlights the context approach and rationale of the Tourism Master Plan.
- **Chapter Two:** Situation Analysis – provides a detailed analysis of the current situation across all areas of the tourism economy covering 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. A SWOT analysis was also carried out identifying the strengths and weaknesses of the tourism sector.
- **Chapter Three:** Development Strategy - it explains the development strategy

According to the World Bank calculations in 2013, attracting 100,000 additional leisure tourists would add 11 percent to exports and 1.6 percent to GDP and an 8% annual growth in leisure and conference tourists would generate an additional USD 220 million in receipts per annum.

and outlines the various strategic interventions required to achieve the key objectives and targets covering institutional and regulatory reform, product and infrastructure development, marketing, tourism skills development, and the financing and investment.

- **Chapter Four:** Implementation Framework – provides a summarised logical implementation matrix of the tourism sector key issues, development strategic interventions, performance indicators, responsible agencies, timeframe and budget.

The Master Plan development strategy is based on a phased approach, focussing initially on core Tourism Development Areas (TDAs) and core products, and gradually will broaden in scope as market demand expand. It involves a comprehensive restructuring and reinvigorating of Uganda’s tourism sector, covering product and infrastructure development, regulatory and data-gathering reforms, strengthening of the skills base, creation of a more attractive financial and investment climate, and vital investment in destination marketing and branding.

Implementation of the strategy is planned in three phases over ten years, and takes into account both what is feasible within this timeframe and the likely availability of financial and human resources.

Phase 1: Consolidation (1 – 3 years):

Strengthening of the core tourism products and focusing on tourism clusters within the key Tourism Development Areas. Consolidation of key source markets through sustained and targeted campaigns. Development of a world-class flagship hospitality training institution (such as HTTI); raising of training standards in public and private sector institutions through curriculum and regulatory reforms.

Phase 2: Expansion and Diversification (4 – 6Years):

Expansion of product development to gradually enlarge the tourism clusters and tourism hubs within the main Tourism Development Areas .Broadening of the marketing strategy to open new and emerging markets, including the domestic market Further strengthening of tourism training skills and provision; development of first Tourism Satellite Account (TSA) and training facilities around the country.

Phase 3: Sustained Growth (Years 7 – 10):

Continued investment in product development in response to increased market demand; expansion of the Tourism Developments Areas. Adjustments and re-focussing of the marketing strategy to adapt to evolving market demand. Increasing specialisation of tourism training provision, and further development of regional and mobile tourism training facilities.





CHAPTER

2



2. Situational Analysis

2.1 Introduction

Sector performance overview

This chapter assesses the current situation in Uganda with reference to the system of tourism statistics, to visitor profiles and visitors' patterns of consumption of tourism goods and services. It examines the state of the Ugandan tourism economy and makes an assessment of the economic, social and environmental impacts of tourism within the context of Uganda's tourism business outlook and of the regional competition.

This analysis provides the basis for the strategic planning needed to strengthen the sector's role in achieving national development goals in the period of 2014-2023.

(a) Key Performance Indicators (KPIs)

In order to provide Objectively Verifiable Indicators (OVIs) on the current standing and performance of the Ugandan tourism sector, key baseline data is presented below, together with the sources of the statistics collected (Table 2.1). Collectively, they serve to provide benchmarks as a platform for making future arrival and revenue forecasts, and for informing other key policymaking and tourism planning decisions. While this provides a current statistical snapshot, they need to be viewed in the wider context of trends over a 10-year period. It should be noted that widespread variance was found in the data, depending on the sources used in each instance.

Table: 2. 1 Uganda Tourism – KPIs

OVI	Data	Source – Year
Tourism's contribution to GDP	5.6%	2012 – UBOS, WB
International tourist arrivals	1.15 million	UBOS – 2012
Tourism earnings (from international tourist arrivals)	USD 805 million	UBOS – 2012
Total earnings generated by tourism (multiplier effect)	USD 1 billion	WB
Numbers employed: Directly Total (including indirect and induced)	199,300 484,000	WTTC – 2012 UBOS – 2012
Tourism earnings as a percentage of total exports	38%	WB

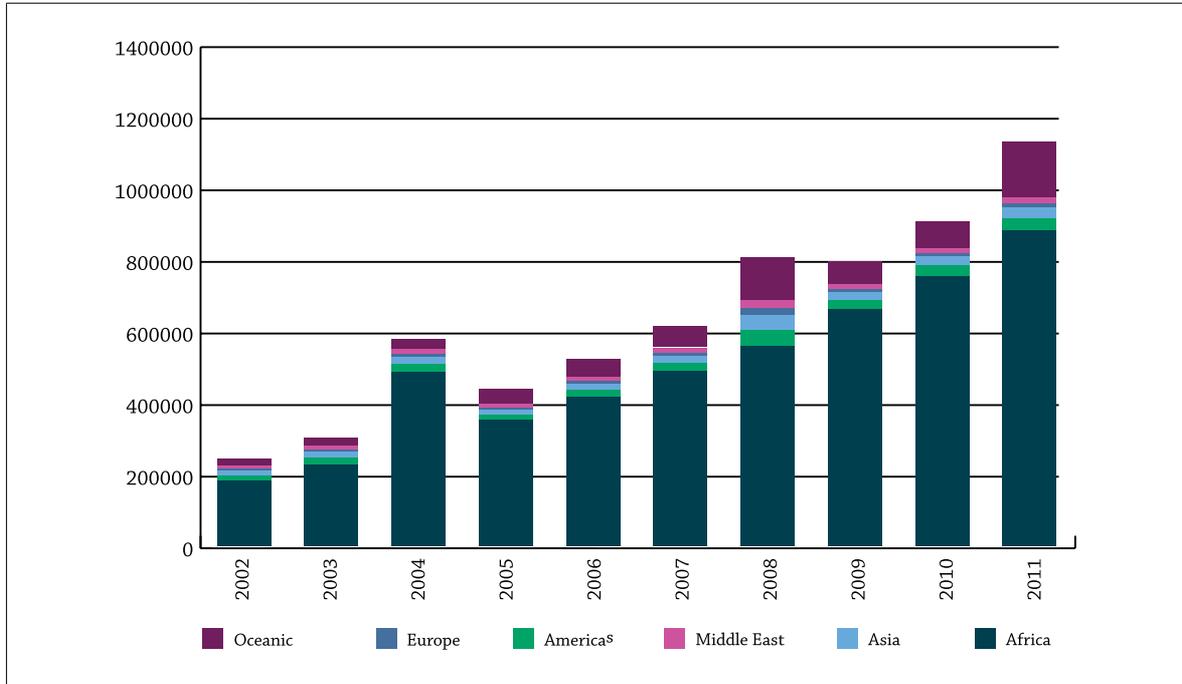
Sources: as indicated

(b) Visitor Profiles and Demand Analysis

In 2001, Uganda attracted 205,000 international visitor arrivals and a decade later (2011), arrivals reached 1.15 million (UBOS 2012). This was a 21.7% increase compared to 2010 and an average annual growth rate of nearly 20%. Even if coming from a low base, this year-on-year growth is spectacular in comparison with both regional and international standards, and this is impressive considering the very limited marketing of the destination over the same period.

Numerically, it is clear that Africa provides by far the largest number of international arrivals for Uganda, especially neighbouring countries in the East African Community (EAC) and the Common Market for Eastern and Southern Africa (COMESA) – Figure 2.1.

Visitor arrivals to Uganda by region of Origin



Source: UBOS, 2012

Figure: 2. 1 International Visitor Arrivals to Uganda (by region of origin)

(c) Main Source Markets

The main source market of foreign visitors to Uganda is regional (76%) with Kenya (344,210 in 2011) and Rwanda (266,221 in 2011) being the two dominant markets (Table 2.2). Political stability has clearly boosted regional travel between neighbouring countries. The close cultural ties and trade opportunities mainly account for the regional travel in addition to major annual events such as the Uganda Martyrs’ Day Celebrations that also attract very large volumes of pilgrims from outside the country.

The recent World Bank survey (TEMS, 2012) identified more than 1 million non-resident visitors to Uganda, around half of whom stayed at least one night. Most of these came from neighbouring countries, Europe and North America: Kenya (16%), Rwanda (10%), USA (15%) and UK (11%). Over 40% of international arrivals visit other destinations in Africa, principally Kenya (20%), Tanzania (12%) and Rwanda (10%). These figures would indicate a propensity among tourists to make Uganda part of a multi-destination trip.

The European (13%) and American (5%) markets accounted for less than one fifth of all international visitor arrivals in 2011 (although these are the two highest spending markets). Uganda has been losing market share in recent years in these two key markets.

Table: 2. 2 Uganda’s Top 10 Tourist Source Markets by Continent 2012

Top 5 African Markets

	COUNTRY	NO. OF ARRIVALS
1	Kenya	383,369
2	Rwanda	256,004
3	Tanzania	79,795
4	Sudan	43,258
5	DRC	42,258

Top 10 European/North American/Asian Markets

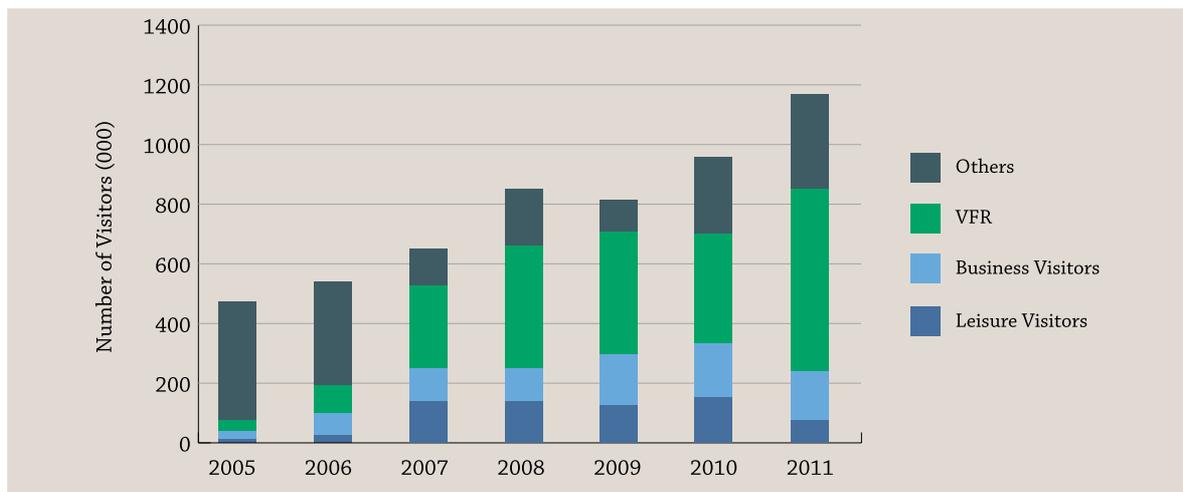
	COUNTRY	NO. OF ARRIVALS
1	USA	55,912
2	United Kingdom	42,508
3	India	24,849
4	Germany	11,701
5	Canada	10,186
6	Netherlands	8,275
7	China	8,645
8	Italy	6,732
9	Sweden	5,866
10	Belgium	5,094

The main source market of foreign visitors to Uganda is regional (76%) with Kenya (344,210 in 2011) and Rwanda (266,221 in 2011) being the two dominant markets

Source: UTB, 2012

(d) Purpose of Visit - by category

The Uganda Bureau of Statistics (UBOS) collects and regularly disseminates statistics on arrival numbers, giving country of residence and purpose of visit (Figure 2.2).



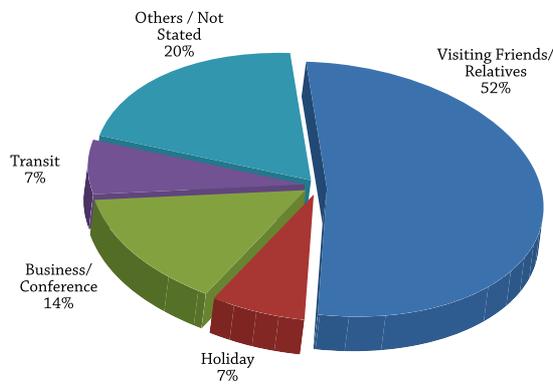
Source: UBOS 2012

Figure: 2. 2 International Visitor Arrivals by Category (2007-2011)

From the Figure 2.2 above, the leisure visitor segment represents only a small share of the total of inbound visitors to the country, accounting for an average of just 16% of all international arrivals to Uganda for the years 2008-2010. However they account for the largest share of visitors to National Parks (see below) and therefore it can be correlated that their main motivation for coming to Uganda was to view the gorillas and the other wildlife parks.

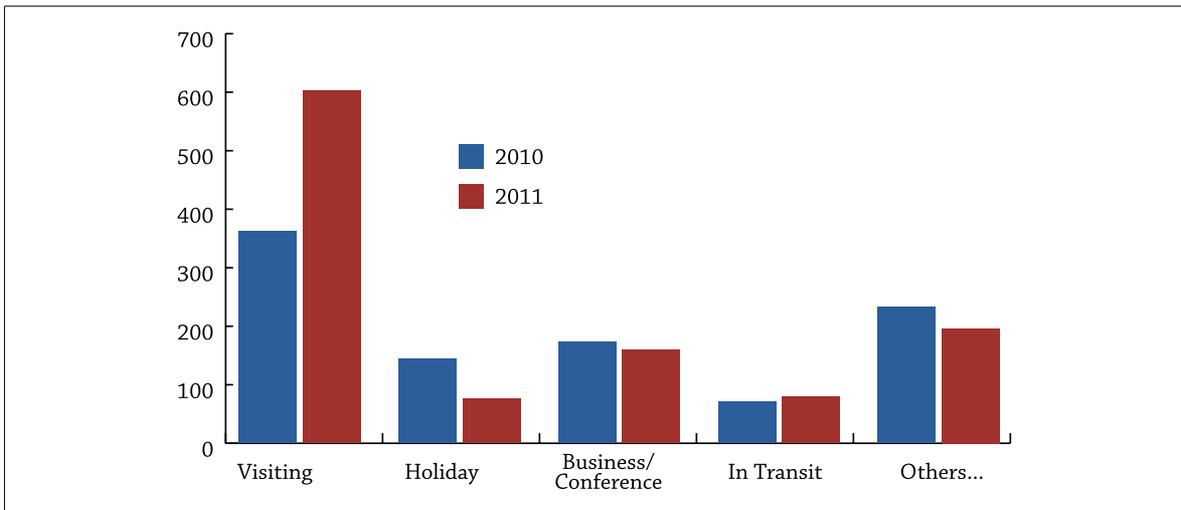
Tourist Arrivals by Purpose of Visit

Out of 1,151,356 tourist arrivals in 2011, 52% declared that their purpose of visit was to visit friends and relatives. 14% were business/conference visitors (down from 18.45%). Leisure/recreation/holiday arrivals and those in transit both constituted 7%, and Others/Not Stated accounted for 20% (Figure 2.3). The arrivals however keep fluctuating (Figure 2.4).



Source: UBOS 2012

Figure: 2. 3 Distribution of Tourist Arrivals by Purpose as of 2011



Source: UBOS 2012

Figure: 2. 4 Tourist Arrivals by Purpose Comparing 2010 and 2011

The slow progress in the share of leisure visitors to National Parks suggests that the core high-spending source markets have not been growing at a rate of other categories of visitors. This can be attributed primarily to the lack of sustained promotion in key markets in recent years, but may also reflect the limited product diversity and development.

(e) Patterns of Consumption

An in-depth study of tourist motivation and patterns of consumption and spending by the World Bank study (Economic and Statistical Analysis of Tourism in Uganda, 2013) estimated that around 75,000 international arrivals were in the leisure/cultural tourist category of the 0.5million international tourist arrivals that spent at least one night in Uganda. This represents an unexplained decline from 149,000 in 2011 and 140,000 and 144,000 in 2007 and 2008 respectively. Around 90% travel in groups of four or less persons in this category. It indicated that 32% of international arrivals come for business reasons, 11% for meetings or conferences, 17% for leisure, 20% for visiting family and relations (VFR), 5% for spiritual/religious reasons and 2% for cultural tourism.

About 6% of all tourists and 20% of all leisure tourists are package tourists (as opposed to independent travellers); 80% of package tourists stay less than 15 days in Uganda and average spend per capita is around USD 1,415 (excluding airfares). Their average daily expenditure is USD 166, which can increase their total discretionary spend by approximately 20%.

(f) Visits to National Parks (NPs)

The majority of visitors to the National Parks are mainly foreign non-residents and students (Table 2.3). Leisure tourists usually stay in accommodation facilities in or near the National parks (such as lodges, cottages, campsites, bandas and homesteads) and they visit more than one National Park. Nature based tourism mainly represents the prime reason for leisure tourists visiting Uganda.

Table: 2. 3 Visitors to National Parks (2005-2011)

Visitors to National Parks (Citizens and Foreigners)	2005	2006	2007	2008	2009	2010	2011
	129,000	110,092	126,553	134,486	151,818	190,112	207,994
Foreigners, non-resident	32%	42%	42%	39%	40%	39%	39%
Foreigners, resident	9%	11%	10%	10%	9%	7%	7%
Citizens, resident - EA	13%	15%	19%	18%	20%	21%	21%
Students	26%	22%	22%	28%	28%	30%	30%
Others	20%	11%	7%	5%	3%	3%	3%

Source: UWA, 2012

(g) Tourist Expenditure

Among leisure tourists, 39% take wildlife safaris, 26% come to see the gorillas, 25% seek adventure/activity tourism, and 17% are backpackers. This latter group (backpackers) stay longer than other leisure tourists, 20 days on average compared with less than 14 days for the average leisure tourist, but spend less: USD 1,160 in total, with USD 1,438, or USD 105 per day and USD 176 respectively.

In 2013 that a typical birder would spend 17 days in the country and can pay around USD 4,500 for an inclusive package.

Given their longer length of stay and, despite spending less per day than average leisure visitors, backpackers are often the pioneers of the tourism world and their expenditure is more likely to reach communities and the rural sector generally.

Most leisure tourists are from Europe (46%) and North America (22%). African tourists predominantly come to Uganda for business or meetings and this category rarely stays more than one week (75% stay less than a week), although a small percentage stay for extended periods of up to 6 months (generally for education purposes from elsewhere in the region).

(h) Niche Markets

A number of special interest market segments are emerging. According to tour operators interviewed for this Master Plan development process, only 5% of leisure visitors are motivated by activities other than watching and tracking wildlife. The most popular niche activities are explained below. Each of these high-spending segments is relatively easy to target, and they provide direct economic benefits for local communities in the rural sector.

A.) Bird Watching

Uganda is a haven for bird-watchers. It is home to over 1,000 species of birds, and 20 Important Bird Areas (IBA). The market is served by 5 specialist birding agencies and 70 guides of whom 30 are national level guides. The precise number of visitors who come to Uganda especially for bird-watching is not known, but their profile is understood. The Uganda Safari Guides Association estimated in 2013 that a typical birder would spend 17 days in the country and can pay around USD 4,500 for an inclusive package. This excludes flights to Uganda, but includes accommodation and meals, internal travel and entry fees to Protected Areas and for guides and nature walks etc. A proportion of this expenditure benefits local communities in and around National Parks and other important birding sites. Bird watching is a lucrative market and is increasing in popularity in the western world. Numbers are estimated to be about 18 million in the USA, 2.2 million in Canada and 2 million in UK.

B.) Fishing

Uganda presents excellent opportunities for sport and recreational fishing on its rivers and lakes (the Nile and Lake Victoria and the many other significant waterways in Uganda). Fishing is one of the most popular of leisure activities and it is estimated that there are about 23 million anglers in Western and Central European countries. Of those, over 4 million reside in the UK and France, about 3.5 million in Germany, and close to 1 million in Italy. This market tends to be 40+ years of age, mostly male and include an affluent segment that travel far and wide in search of good fishing. Dedicated sport anglers search for 'the big catch', require good accommodation close to the water and expect good support services (local guides, platforms, boat rental, food/beverages supply). They have little interest in the other tourist attractions of a destination.

C.) Sport Hunting

Regulated and managed through UWA, spending by sport hunters can benefit local communities and help to mitigate the human/wildlife conflict in and around protected areas. It can provide a significant supplementary source of income for rural communities and also has the potential to support wildlife farming, which can generate up to twelve times the income derived from rearing domesticated animals. UWA demarcates hunting blocks inside which they issue hunting concessions to licence companies for a given

period of time. Hunting is confined to specific animal species that are killed based on an annual percentage off take that is scientifically arrived at using data from baseline surveys and animal census.

In some districts the land-owners receive a percentage of the fee per animal hunted on their land. Hunters typically spend an average of between USD 30-100,000 per visit. In Lake Mburo NP alone (smallest of the National Parks) is reported to cater for around 100 hunters a year. The annual revenues from sport hunting have steadily increased from USD 33,305 in 2002 to USD 88,200 in 2011 (UWA 2012).

(i) Seasonality

Seasonal factors also affect visitor type and spending. The low season runs from November to June and the high season from July to October and visitors differ accordingly. Unusually, the seasons are not determined so much by local climate patterns (the wet seasons are relatively benign, and temperatures do not vary dramatically) as by holiday time and other seasonal factors in the main source markets.

Those visiting in the low season are less often leisure tourists than in the high season (16% compare with 20%) and they spend on average 50% less than high season leisure tourists (USD 981 in total, compared with USD 1,718 – per day, USD 139 and USD 210 respectively). Unsurprisingly, the percentage of package tourists is much smaller in the low season among leisure tourists (14% as opposed to 29% in the high season).

(j) Domestic Tourism

The 2003 Tourism Policy highlighted the potential and importance of domestic tourism in providing a reliable source of business for tourism suppliers, that can help compensate for unforeseen fluctuations in demand from foreign markets. However, until recently the domestic Ugandan market had not been studied in much detail and was not adequately understood. In 2013, a domestic tourism study was undertaken to inform the development of the Tourism Master Plan.

The study provides valuable insights into the travelling patterns of domestic tourists, the products they consume and their likes and dislikes:

- Most domestic tourism activity is comprised of day trips - time spent away from home of less than 12 hours;
- Most people travel for leisure purposes (63%) with a substantial number travelling for business (22.4%), with VFR and travel for educational purposes being very low – 6.7% and 3.8% respectively;
- 70% of the domestic tourists were less than 30 years-old;
- 40% spent between UGX 10,000-50,000 per trip, with 19% spending more than UGX 100,000, mostly on meals and transport;
- The strongest motivation to travel was the desire to visit a place not visited before
- Beach activities were indicated as the most preferred activity, followed by going out for a meal;
- Visiting amusement parks, cultural sites, museums and monuments, and art galleries were the least popular activities;

It is estimated that by 2023 some 588,300 persons will be directly employed in the tourism sector provided that human resource development is adequately resourced, to include substantial investment in training and up-skilling.

- Nearly 75% use friends and relatives for ideas and information on where to go and what to do;
- The cost of travel and accommodation in Uganda was considered very high; most respondents believed that facilities in National Parks were too expensive for them;
- Tour operators interviewed believed that the greatest constraint to domestic tourism development is the lack of accessibility to tourist attractions, due to poor roads and lack of promotion of domestic tourism;
- 33.5% of respondents earned between UGX 250,000 (USD 97) and UGX 500,000 (USD 193) a month, 31.3% under UGX 250,000 (USD 97), 20.1% between UGX 500,000 (USD 193) and UGX 1,000,000 (USD 387) and 15% above UGX 1,000,000 (USD 387).

Cost is a major factor in domestic travel decisions. Lack of affordable and reliable transport to and from main tourist attractions, and affordable accommodation in those locations are the key factors in limiting the growth of the domestic market.

(k) Tourism Employment

The World Travel & Tourism Council (WTTC) estimates that in 2011 tourism was directly responsible for 180,900 jobs, with the figure rising to a total of 447,400 jobs when factoring in jobs indirectly supported by the industry. These figures represent 2.7% and 6.6% of the Uganda workforce, respectively. In the five year period from 2008 to 2012 the number of people employed in the tourism sector grew by 32%. The annual employment growth rate showed considerable variation from 14.7% in 2009 to -1.3% in 2012.

On the basis of WTTC forecasts, it is estimated that by 2023 some 588,300 persons will be directly employed in the tourism sector provided that human resource development is adequately resourced, to include substantial investment in training and up-skilling.

(l) Competitive Performance

The World Economic Forum (WEF) has formulated a competitiveness index that uses a broad range of criteria that include the tourism regulatory environment, business environment, and infrastructure, human, cultural and natural resources. Based on key tourism decision-makers' perceptions of the relative competitiveness, the travel and tourism industry in each of 139 countries is ranked.

At an aggregate level, Uganda scores poorly on the competitiveness index. In 2011 Uganda achieved a total score of 3.36, ranking 115 out of 139 countries worldwide – a ranking lower than any of the East African country (Table 2.4).

Table 2. 4 Tourism and Travel Comparative Rankings – Sub-Saharan Africa

	South Africa	Zimbabwe	Botswana	Kenya	Tanzania	Rwanda	Uganda
Overall (2011)	66	119	91	103	110	102	115
Overall (2009)	61	121	79	97	98	n/a	111
Regional	2	12	5	8	11	7	13
T&T regulatory framework	82	118	86	113	121	75	116
T&T business environment and infrastructure	62	126	85	106	127	120	125
T&T human, cultural, and natural resources	49	96	98	72	56	110	80

Source: *Travel and Tourism Competitiveness Report, 2011*

Other East African states have more favourable rankings on the competitiveness index: Kenya (score 3.51) ranked 103; Rwanda (score 3.52) ranked 102; Tanzania (score 3.42) ranked 110. Generally, the competitiveness index score is higher for countries at more advanced stages of development than countries at a lower level of income. The analysis below (Table 2.5) illustrates the performance ranking of Uganda on the various competitiveness parameters in comparison with Kenya and Tanzania.



Table: 2. 5 Tourism Competitiveness – Regional Comparisons

	Kenya		Tanzania		Uganda	
	Rank	Score	Rank	Score	Rank	Score
Index 2012	103	3.51	110	3.42	115	3.36
T&T regulatory framework	113	3.87	121	3.67	116	3.75
Policy rules and regulations	103	3.83	97	3.92	100	3.89
Environmental sustainability	26	5.12	43	4.89	40	4.90
Safety and security	139	3.17	115	4.00	117	3.93
Health and hygiene	130	1.64	134	1.28	125	2.07
Prioritisation of Travel & Tourism	18	5.56	90	4.26	110	3.94
T&T business environment and infrastructure	106	2.93	127	2.62	125	2.65
Air transport infrastructure	72	2.94	121	2.19	119	2.25
Ground transport infrastructure	87	3.18	123	2.69	119	2.73
Tourism infrastructure	111	2.05	125	1.68	126	1.66
ICT infrastructure	112	2.14	130	1.80	125	1.90
Price competitiveness in the T&T	93	4.33	56	4.75	57	4.71
T&T human, cultural, and natural resources	72	3.75	56	3.97	80	3.67
Human capital	106	4.35	125	3.83	113	4.22
Affinity for Travel & Tourism	70	4.61	80	4.50	57	4.75
Natural resources	28	4.42	2	5.86	29	4.38
Cultural resources	107	1.61	101	1.70	125	1.35

Source: *Tourism and Travel Competitive Index (2012)*

Uganda is not perceived as a cost-competitive destination, yet ranks 57th in the world on the criteria used in the WEF index. This compares well for a country ranked 115th on aggregate competitiveness. In comparison with the other selected countries in the region, Uganda compares poorly on most of the criteria used.

Uganda's tourism product base is exceptional, although in many respects under-exploited, and it has to compete with similar strongly marketed products offered by Kenya and Tanzania. The impact of this is reflected in arrival numbers and tourism receipts (Table 2.6).

Table: 2. 6 Tourism Arrivals and Receipts in the EAC (by Member States)

	Burundi	Kenya	Rwanda	Tanzania	Uganda	Total EAC
Arrivals ('000)						
2009	212	1392	646	695	807	3,752
2010	142	1470	619	754	946	3,931
Receipts (USD million)						
2009	2	690	174	1160	667	2,519
2010	2	800	202	1254	784	2,840
2011	2	884	252	1457	805	3,148

Source: UBOS and EAC statistics

In general tourism has a high potential to contribute to socioeconomic development of the country, but the sector is characterised by uneven patterns of demand, notably by 'seasonality' where utilisation of tourist assets and facilities fluctuates according to both internal and external factors. However effective planning for the sector is mainly constrained by critical inadequacy in data availability/accessibility, methodological and conceptual issues related to collection of tourism statistics.

2.2 Tourism Planning and Management

2.2.1 Introduction

The level and nature of planning and management greatly determines the level of development of the tourism industry at any particular destination. This is mainly influenced by the nature of the existing regulatory framework and the institutional arrangement that are important in guiding and determining the strategic direction of the tourism sector.

2.2.2 Planning and regulatory framework

In Uganda, the planning and management of the tourism sector is mainly guided by the overall national development framework especially the National Development Plan (NDP) 2010-2015, and Vision 2040. The NDP identifies tourism as a primary growth sector and proposes a number of strategic interventions to increase the sectors contribution to the countries' socioeconomic development.

The Vision 2040, which provides a 30 year strategic direction for the country, also identifies tourism a one of the sectors with high potential to harness the countries opportunities', that will enable it achieve its vision of faster socioeconomic transformation.

At the sectoral level, planning and management of the tourism industry is mainly guided and regulated by a number of policies, laws, regulations and guidelines. Notable of these are; Constitution of the Republic of Uganda (1995), Tourism policy (2014), Tourism Act (2008), Uganda Wildlife Act (2000), Historical Monuments Act (1967), Universities and other Tertiary Institutions Act (2001) All these policies and Acts, mandate the Ministry of Tourism, Wildlife and Antiquities (MoTWA) to set policy, oversee, monitor and coordinate the tourism sector.

2.2.3 Institutional arrangement

As earlier noted the overall mandate to oversee, monitor and coordinate the tourism sector is with the Ministry of Tourism, Wildlife and Antiquities (MoTWA).

The responsibilities of MoTWA include the following:

- plan and develop a sustainable tourism sector;
- formulate, promote and monitor policies for sustainable growth
- supervise the tourism sector;
- ensure compliance with best environmental practices;
- promote investment in the sector;
- liaise with international organisations;
- initiate, develop and promote regional and international cooperation;

- support and guide the Board;
- Collect process and distribute statistics in conjunction with the Uganda Bureau of Statistics.

To perform its duties the MoTWA, has an elaborate structure with various departments and implementing agencies that perform a number of roles (Figure 2.5). Each of the agencies has a designated mandate - Uganda Tourism Board (tourism marketing), Uganda Wildlife Authority (wildlife conservation), Uganda Wildlife Education Centre (animal rescue and environmental education), Uganda Wildlife Training Institute (wildlife conservation training) and the Hotel and Tourism Training Institute (tourism and hospitality training).

The Ministry is faced by a number of challenges which include limited funding, inadequate staffing, unclear and overlapping roles between some agencies in MoTWA. A case in point, in terms of staffing, out of the 301 approved posts in the ministry, up to 143 are vacant. These among other factors have limited the MoTWA to fully perform its roles as envisioned.

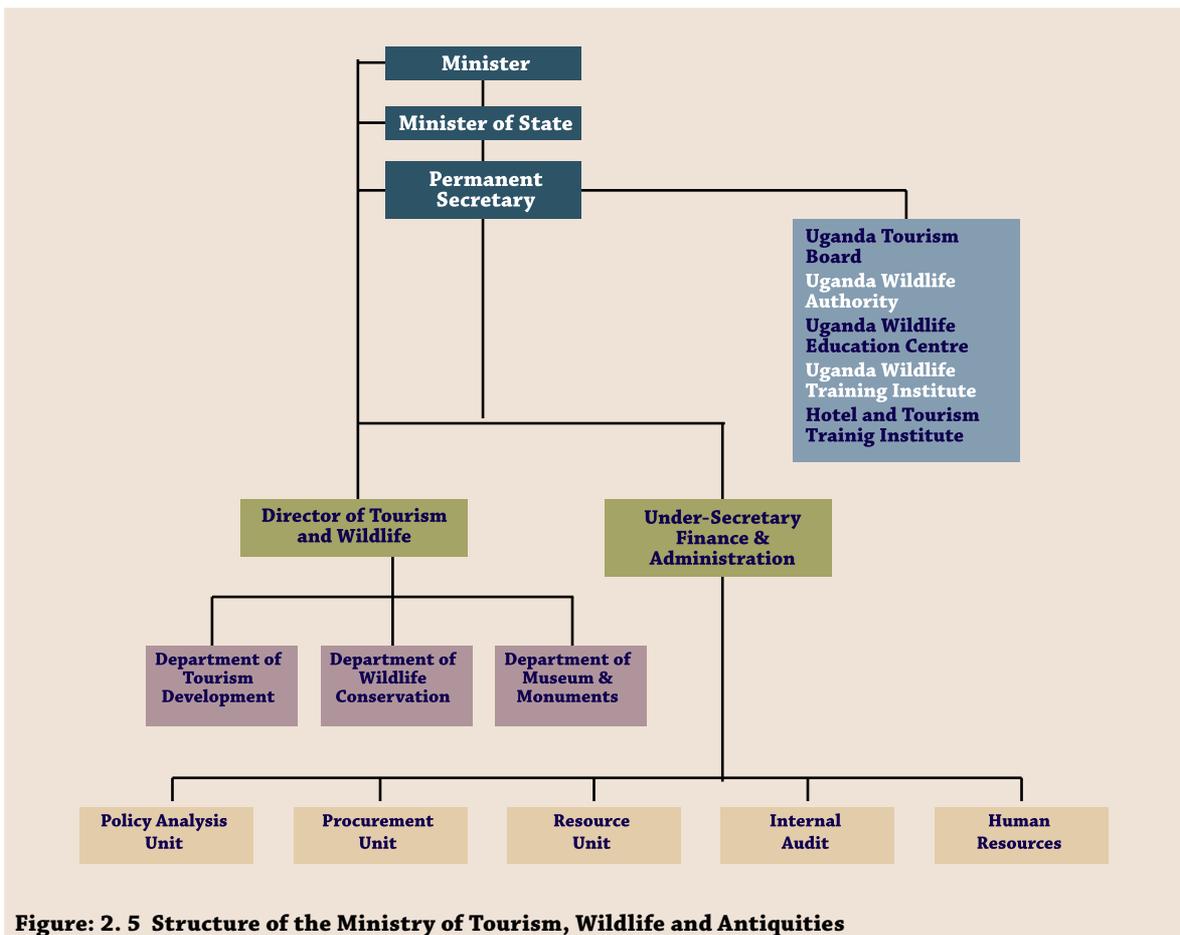


Figure: 2. 5 Structure of the Ministry of Tourism, Wildlife and Antiquities

Although the Local government Act (1997) provides for a multi-tiered decentralised system based at the district (where the local governments have powers to make local policy, regulations and formulate development plans), and the Physical Planning Act 2010 provides for district, urban and local physical development plans to ensure development control (including conservation of natural and cultural/historical resources), there is still limited integration of tourism planning and management in the local government structures.

However 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. For instance, Kampala Capital City Authority (KCCA) 2012 updated Structure Plan recognises Kampala as a tourism destination and a hub. It is recognised that the majority of tourists pass through Kampala and that the tourism potential of Kampala is significant. More so, a number of regional tourism clusters/ initiatives are increasingly being established by local political elite in collaboration with local governments, such as the Busoga Tourism Initiative, Bunyoro Tourism Initiative, and the West Nile Cultural and Tourism Initiative.

The private sector, though still nascent, has increasingly played a big role as the driving force of the sector, working together under Uganda Tourism Association (UTA). The private sector has contributed to the planning and managing of the sector mainly through their trade associations, which include: Association of Uganda Tour Operators (AUTO); Uganda Association of Travel Agents (TUGATA); Uganda Hotel Owners Association (UHOA) and Uganda Safari Guides Association (USAGA).

However 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 trade associations, leading to a lack of consistency in service quality control and standards.

It should be noted that the planning and management of the tourism sector is increasingly being influenced by decisions taken by regional economic blocs. Uganda is a member of East African Community (EAC); Intergovernmental Authority on Development (IGAD); Common Market for Eastern and Southern Africa (COMESA). Within each of these groupings, intra-regional tourism is making an increasingly important contribution to individual members' economies and a number of strategies are being implemented in an effort to achieve sustainable tourism development.

EAC, a regional intergovernmental organisation of the Republics of Burundi, Kenya, Rwanda, Tanzania, and of Uganda is the most significant bloc for Uganda's economic development and tourism development in particular. In Uganda 40% of all international arrivals in 2012 (UBOS) were from other African countries, the majority of whom were from other EAC nations. Articles 115 and 116 of the Treaty for the Establishment of the East Africa Community outline the principles for co-operation in Tourism and Wildlife Management. The EAC Strategic Development Strategy 2006-2010 put in place various strategic tourism interventions that have led to a number of achievements which include;

- **Marketing East Africa as a single destination:** Partner States have been participating at international tourism fairs as a bloc including the WorldTravel Market (WTM) in London (since 2006), ITB in Berlin (Internationale Tourismus-Börse; since 2007); and Investour (2012). This has been complemented by the production and distribution of common promotional materials (mainly brochures and DVDs).

- **Formation of the East African Tourism and Wildlife Coordination**

Agency(EATWCA): draft operational manual and protocol have been prepared and EATWCA's functions include to:

- Market the EAC region as a tourism destination;
- Provide a legal frame work for co-operation among Partner States from a wide range of stakeholders;
- Provide a centre ground for private-public partnership;
- Initiate and coordinate a Regional Tourism Policy;
- Brand the EAC's tourism product;
- Initiate and coordinate research as per market needs and trends;
- Enter into agreement(s) with private; international NGOs to support its promotion campaign.

The creation of the single tourist destination should also benefit conservation and wildlife management. The EATWCA, funded by the five countries, will have the power to raise and distribute funding and co-ordinate tourism policies. It has already been seen, through the USAID's Tourism for Biodiversity Program in partnership with the African Wildlife Foundation (AWF)

- **Launch of travel magazine:** in November 2012, the EAC launched a travel magazine known as 'Travel around East Africa' at the WTM in London, planned to be published twice a year.
- **Accommodation grading:** assessors of accommodation facilities have been trained and the classification of accommodation establishments and restaurants continues in the Partner States based on classification guidelines, that will also help potential investors on best practices in developing hospitality facilities
- **Common tourist visa:** In 2014three of the Partner Sates Uganda, Rwanda and Kenya (Tanzania and Burundi may join later) launched the single tourist visa. To further encourage easy movement of persons, national identity cards of member states are recognised as travel documents, as measures are in place to establish the East African identity card.
- **Single Customs Territory (SCT):** in the spirit of East African integration, the revenue collection agencies of Uganda, Kenya and Rwanda have begun preparations for implementation of the SCT. This will enable goods to move across borders with little or minimal formality, reduce clearance costs and increase revenue collection through easier payment systems via a single tax clearance centre at Mombasa port. This is especially important for Uganda as a landlocked country of the EAC.

Apart from the EAC other regional blocs have also instituted a number of measures to promote intra-regional tourism. IGAD in 2013 launched a Sustainable Tourism Master Plan to guide and coordinate regional tourism and COMESA and SADC are considering introducing common tourist visas to boost borderless movement within the blocs.

In general although progress to achieving greater regional convergence has been slower than anticipated, tourism planning and management at both regional and national level is bound to improve overtime. The wider economic and fiscal measures being taken by regional blocs should help moderate the cost of doing business in Uganda thereby enhancing the country's competitiveness as a tourist destination.

2.2.4 Key tourism planning and management issues

Although the overall responsibility of MoTWA is to supervise, monitor and coordinate the tourism sector, it has overtime become involved in implementation due to the slow process of devolving management functions to the various agencies. This has mainly been as a result of limited human resource capacity in the agencies. International best practices indicate that the ministry functions are best concentrated on policy, strategy and long term planning formulation, together with setting national targets and monitoring the performance of the industry and reporting agencies.

There is need to clearly delineate the functions of the implementing agencies. For instance, according to international best practice the roles of agency engaged in promoting and marketing the country should not overlap with that monitoring, regulating and enforcing compliance with the existing laws and guidelines – functions that are usually under a Tourism regulatory Authority. Therefore there is need review existing laws, such as the Uganda Tourism Act 2008 to clearly streamline mandates and responsibilities of various departments and agencies. More so there is also need to review the existing regulatory framework to ensure it empowers institutions to fully exercise their mandate. For instance the Historical Monuments Act, which is under review, has been weak and offering limited protection of cultural and historical resources due to limited conservation provisions and the lenient penalties.

Apart from the institutional arrangement within the MoTWA, there is limited inter coordination between the ministry of Tourism and other Ministries such sectors and government agencies in charge of infrastructure development, finance and economic planning, foreign affairs, internal affairs, among others. Tourism has not been fully mainstreamed in all government sectors and activities. As a result the multi sectoral dimensions of the tourism sector have not yet been fully harnessed.

As earlier noted tourism planning and management has over the years mainly been centralised with limited local government involvement. This has resulted in tourism development especially tourism infrastructure evolving nationwide in an unplanned and frequently unsatisfactory fashion. This is particularly true on the fringe areas of most popular National Parks, where numerous lodges are being constructed in an uncoordinated manner.

With the anticipated future development of the sector in the country side, there is a clear and pressing need to rein in on such developments to ensure that they are sustainable and meet the service standards to fulfil the expectations of visitors. The MoTWA, in liaison with local governments needs to coordinate tourism development to ensure that it does not negatively affect the resource base and ultimately compromise the quality of the tourism offer.

Inspite of the tourism private sector having a number of trade associations, they have not yet fully exploited their full potential as growth drivers, advocacy and collective decision making organs. Most associations are weak, with poor governance, low membership and are under resourced, both in financial and human resource capacity. As a result they are not clearly articulating the industry's contributions and needs to the various stakeholders including Government and the public.

At the regional bloc level despite the various achievements, tourism planning and management at regional is faced with challenges of limited coordination and mainstreaming of regional tourism strategies in national plans, limited range and uneven quality of tourism products across the member nations, inadequate and

The MoTWA, in liaison with local governments needs to coordinate tourism development to ensure that it does not negatively affect the resource base and ultimately compromise the quality of the tourism offer.

inefficient infrastructure, insecurity in some nations, negative publicity in key source markets, and stiff competition from cheaper destinations elsewhere in Africa and beyond.

In general, inadequate (and sometimes weak) regulatory framework, coupled with limited coordination, funding and human resource capacity forms the biggest challenges facing tourism sector planning, management and development.

2.3 Tourism Destination Marketing

2.3.1 Introduction

In an increasingly competitive tourism industry, a key challenge for destination marketers is to cut through the noise of competing and substitute products to attract the attention of the consumer traveller. Effective marketing is therefore needed to offer customers benefits tailored to satisfy their needs in a way that is different from other competitors.

In Uganda different marketing strategies have been designed and developed to promote tourism destinations but more could be achieved. This master plan therefore builds from the past strategies employed and proposes new strategies to increase visibility within and outside Uganda.

2.3.2 Tourism Marketing Organisation Structure

Tourism marketing in Uganda is mandated by Uganda Tourism Board (UTB) which is responsible for marketing all tourism products and services in the country both internally and outside. UTB, headed by the Executive Director, carries out the functions of: formulating and implementing an international marketing strategy; encouraging and promoting domestic tourism within the country; encouraging investment in the tourism sector.

In order to carry out its functions UTB cooperates and closely works with other sector players both in the private and public sectors. This is mainly with organisations such as UWA, UCOTA, AUTO, UTA, PSFU, UHOA, COBATI etc. Several associations run websites that promote Uganda's touristic attractions, provide relevant and practical tourism information, as well as feature their associations' activities. Since tourism in Uganda is private sector driven UTB needs strong support from the private sector in order to act as a promotional figurehead for Ugandan tourism.

In order to ensure a coordinated marketing approach, UTB also needs to closely work with government agencies that also contribute to the marketing of tourism attractions in the country. For instance UWA, which is an agency of MoTWA charged with conservation of natural resources, has a marketing department that promotes and markets products in protected areas. UWA through its market research publishes brochures and runs a website that provides information on the parks, wildlife that can be seen, conservation programmes that are in place, tourism facilities and activities available.

On addition to UTB, UWA and other trade associations, regional tourism clusters have started marketing initiatives to promote tourism in their respective regions. For instance Bunyoro and Buganda kingdoms have organised Tourism Expos in collaboration with UTB.

Some districts market tourism in their areas and have formulated marketing strategies - although these do not appear to have been in conjunction with UTB. Individuals too have elaborate websites and blogs presenting general tourism information on tourism attractions, opportunities and facilities in the country.

2.3.3 Past and Current Destination Marketing

In an effort to increase Uganda's share of the tourist market, several strategies and plans have been developed in the past to address issues of market access, branding and visibility. The following discussion reviews the previous and current marketing efforts by the industry to make Uganda the favourite tourist destination.

Marketing Strategy 2004-2008

This marketing strategy was formulated with support from the Uganda Sustainable Tourism Development Programme (UGSTDP 2004-2008) funded by the European Union. The strategy was guided by the four core elements that included: promoting Uganda as an experiential travel destination; market prioritisation; industry partnerships; and customised marketing campaigns.

The main objectives of the strategy were to: improve the image and appeal of Uganda in the principal source markets and segments; increase the level of interest in travel to Uganda; increase the product range in the market place; and increase tourism earnings in Uganda. The plan recommended focusing the primary marketing investment (65% to 75% of the budget allocation) on the UK, USA and Kenyan (both nationals and expats) markets, and the secondary investments on nurturing further growth in the domestic (including expats), South African, Dutch and German markets. It prescribed promoting key attractions such as the gorillas and primate viewing as well as bird watching and other special interest products to attract specific market segments. It also recommended combining different Ugandan 'attractors' to appeal to the more general tourists seeking an African experience and promoting Uganda as an 'undiscovered jewel'.

Given the limited funding to the sector and inadequate human resource, all the marketing strategies could not be fully implemented. In spite of this, some achievements were realised under the strategy. For instance consumer research was conducted in UK and US and survey of tour operators was conducted in UK, US Netherlands and Italy. Uganda produced a range of publications and collateral materials and also attended international travel fairs. Tourist arrivals and receipts increased during this period, though not substantially high.

The monitoring and evaluation of the strategy specified the need to formulate a new marketing strategy. This was based on the situational assessment which indicated that; new markets had emerged such as China and Russia, the need to diversify the tourism product offer to include cultural tourism and MICE, and the need to prioritise and focus on the domestic market.

Draft Marketing Strategy 2011-2016

In 2011, the Tourism Board facilitated the development of a new marketing strategy to guide the marketing operations. However, the completion of this strategy was stayed when the process of developing this integrated Tourism Master Plan was commenced. It was agreed to incorporate the strategy in the main Master Plan document. The marketing strategy identifies the main marketing goal - to 'position Uganda as a premier East African holiday and ecotourism destination with a variety of quality

experiences in the wild, communities and everywhere in the country'. A number of short-term as well as long-term objectives are presented to address the weakness identified and to achieve the overall goal. These include amongst others focusing the marketing effort in the short-term on the domestic and foreign expatriate market and developing a brand identity for Uganda, and in the long-term:

- Carrying out comprehensive market research;
- Building awareness of Uganda as a viable holiday destination in key source markets in Europe, America and Asia; and
- Increasing visitor numbers by 30% from these markets, length of stay by 20% and expenditure by 5% per annum.

The strategy focuses on the markets that are already strong for Uganda and those that are growing source markets in the global arena. Four core strategies are proposed: marketing campaigns supported by research; targeting selected markets; Industry stakeholder partnerships; and tailoring marketing activities for each target market.

The markets focused on include the domestic market, the regional foreign resident market, the Europeans, North American and the Asian markets. Both the 2004-2008 strategy and the 2011-2016 strategy highlight more or less the same problems, state similar objectives and propose (with some variations) similar solutions and strategic recommendations.

In order to align with the regional tourism initiatives the UTB's Strategic Plan 2013, provides for marketing EAC as a single destination which is also seen as an opportunity to exploit in the future. The Intergovernmental Authority on Development (IGAD), which groups together eight East African countries (Uganda, Eritrea, Djibouti, Ethiopia, Kenya, Somalia, Southern Sudan and Sudan), also intends to market the Eastern African region as a single destination in its regional tourism master plan.

UTB's Marketing Activities

The discussion below highlights the key marketing initiatives of the Tourism Board and weighs on the effectiveness and impact they have achieved.

Tourism Publications

UTB has over the years produced marketing collaterals in form of publications to support the dissemination and awareness campaigns in various markets. Some of the print materials were developed more than a decade ago and are still under distribution. The range of publications distributed by UTB falls into three categories:

- Publications produced during previous projects: brochures were produced by UGSTDP
- Publications and collaterals produced by UTB on an ad-hoc basis: these include: Birding in Uganda book, promotional DVDs, Posters, folders and bags made out of recyclable material, and key holders in the shape of Uganda.
- Annual publication: Destination Uganda – an information and marketing brochure published annually.

However, the bulk of these publications have been produced with support from development partners and therefore cease to be published once the projects end. Consequently, there is lack of freshness, innovation and customisation required at

each campaign. Additionally, the stock and variety of the supply is limited and cannot service the demand at the various marketing campaigns. This impact's negatively on the visibility and competitiveness of the destination.

Trade Fairs and Exhibitions

UTB participates in a number of Trade Fairs and Exhibitions. In 2012, the board participated in five trade fairs: ITB in Berlin and WTM in London (a PR agency was hired); Karibu regional trade fair in Tanzania (no PR agency was hired); Bird Fair in the UK (no PR agency was hired); and Rio+20 in Brazil, a one-off attendance to participate in the Rio + 20 Summit funded by UNDP and no PR agency was engaged). Locally UTB attends 20 to 25 local events in Uganda such as World Tourism Day, Martyrs Day, Buganda Expo and one-off events such as Route Canada.

The effectiveness of these campaigns has often been minimal because of delayed and inadequate preparations by UTB. This is compounded by the inadequate funding and the limited capacity of the tour operators in terms of negotiating skills, booking business meetings and contract processing.

Familiarisation Trips

Familiarisation trips, commonly referred to as FAM trips or visits, have been effective tools in exposing the destination to key tourism vendors and travel writers. The objective of FAM visits has often been linked to broadening the visibility of the destination and creation of positive image.

The UTB organizes FAM visits in partnership with the private sector who provide transport and accommodation concessions. It should be noted that the organisation of FAM visits has been adhoc and often unrelated to the core market targets identified in the marketing strategies. In essence, FAM visits have often been organised for groups whose net value or return on investment is low. This situation has caused fatigue on the side of private sector partners who are increasingly less willing to support FAM trips. Other agencies such as UWA also organise FAM trips for Ugandan operators and handling agents where they exclusively focus on wildlife tourism.

Advertising

The limited budget of UTB has constrained its ability to commission advertising campaigns. The cost of advertising in print and electronic media is an expensive option. Subsequently, Uganda has not effectively utilised option in her marketing outreach.

It suffices to note that even with the limited resources committed, this option has not been leveraged innovatively. Resources have been committed to one-off advertising campaigns offering limited impact. Therefore the limited advertising resources have not been effective pooled and targeted to offer maximum and sustainable impact.

The current marketing strategy makes provision for substantial advertising campaigns on mass media (TV, radio, newspaper) and on outdoor panels aimed at the domestic market and at selected international markets. Provision is also made for substantial E-marketing. Some of the advertising proposed is very imaginative and innovative. For instance one that stands out is: 'GANDA - the only thing missing is 'U'

Uganda Tourism Website

The current UTB website is quite comprehensive and provides a good overview of tourism in Uganda (history, culture, people, destinations and attractions, activities, events and exhibitions). It also provides a travel guide, a directory of tourism service providers, relevant contact details (tourist offices, embassies, banking services and

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Uganda has earned a number of accolades, most notably being: voted best destination in 2012 by Lonely Planet; Bwindi Impenetrable Forest National Park voted the best birding place in Africa by the World Birding Authority; and the Virungas identified as one of the top 20 places to visit in the world by National Geographic.

others), an information centre presenting investment opportunities, an investor's guide, press releases and research and statistics, and a blog. There is a prominent section presenting relevant and up-to-date tourism news. In spite of this, the website has limited functionalities, it is frequently slow and characterised by break downs.

To overcome this, the website is being replaced by a tourism portal being developed by a marketing specialist. It is clearly presented and easier to read with more functions and links to other stakeholders in the sector. Each government agency, such as UWA or HTTI, will have its own page. There is a section for the reading community with blogs, forums, and opportunities to network using social media.

Links are planned for targeted social media such as Face book, Twitter and YouTube. Other sections being developed include a comprehensive photo gallery, news feeds, a map, promotions and events. It will be possible to access the site in several languages (English, Chinese - or Japanese, Italian, German, French and Spanish). To ensure that the site appears prominently on the first page of search engines, the specialist is applying Search Engine Optimisation (SEO). The website could further redesigned to become more relevant to different user needs.

Social Media

UTB is also on a social media network. The network allows destination marketers to communicate directly with interested potential customers and to build a two-way relationship has recently engaged a fulltime social media specialist and has been quite active with online marketing. Its Face book account has the maximum 5,000 friends and presents three pages: Two Newsletters are published monthly, one for stakeholders and the other for tourists.

Uganda Tourism also has a Twitter account with 270 followers - any mention of Uganda is re-tweeted, thus reaching an even wider audience. UTB's social media is up-to-date and managed by a full-time employee. However, it is showing relatively low levels of activity, engagement is low and response time is slow compared with other destination marketing sites.

In general, in spite of the many challenges Uganda has earned a number of accolades, most notably being: voted best destination in 2012 by Lonely Planet; Bwindi Impenetrable Forest National Park voted the best birding place in Africa by the World Birding Authority; and the Virungas identified as one of the top 20 places to visit in the world by National Geographic. However Uganda has failed to build on these PR opportunities and is still associated with negative perceptions based on past events.

2.3.4 Key Tourism Marketing Issues

Weak strategy implementation and Marketing Capacity

Poor destination image, lack of research, limited partnership to market the destination; limited product range, etc. have persisted mainly due to continuous lack of funds and capacity at UTB to implement the strategies. Limited funding has led to last minute preparations when going for trade fares leading to missing out on pre-event activities.

Weak statistical and research base

UTB has limited capacity to undertake research on its own for use when making marketing decisions. The lack of reliable and credible statistics is seriously affecting stakeholders' decision-making at all levels. Neither UTB nor MoTWA carry out regular market research programmes to fully understand the provenance and behaviour of tourists that visit Uganda.

UBOS collects tourism statistics on a regular basis, derived from the arrivals card that visitors complete at the border (now supported by the PISCES system, the electronic fingerprinting system that is being introduced at Uganda's borders).

While this is a complex task that can only be handled by a major data collection and processing institution such as UBOS, it is essential those tourism specialists are involved in the research methodology and the interpretation of the results so that the data produced is meaningful and provides the information required by stakeholders in the sector.

Several one-off surveys have been carried out in recent years and provide some additional information, which has been used as the research base for this study. These include: World Bank sponsored study entitled; Economic and Statistical Analysis of Tourism in Uganda (2013); Tourism Expenditure and Motivation Survey (MoTWA and UBOS 2012); Uganda Inclusive Tourism (ITC 2011); and two domestic tourism surveys carried out in 2013, focusing on the demand side and supply of domestic tourism.

Weak Uganda Tourism Brand

A destination brand is often described as a powerful tool with the ability to create emotional appeal. The brand image is considered crucial to the marketing success of a tourism destination. Uganda's brand is not well established and positioned in the desired markets and lacks consistency (Uganda Tourism Sector Assessment, World Bank, 2012). The brand is weak and barely recognised outside Uganda. Attempts to reassess the brand and to introduce new tag lines have had limited success and 'The Pearl of Africa' has been persistently associated with Uganda's tourism brand. 'The Pearl of Africa' brand name has strong political support. The cost of changing a country's tourism brand can be extremely high with no guarantee of success.

Uganda's tourism brand lacks a clear identity and brand guardianship – there is no clear brand custodian responsible for brand management and communication. The low level of funds available for marketing means that there is poor marketing and communication of the brand promise. Therefore UTB and other stakeholders need to support the converting of the 'Uganda - Pearl of Africa' slogan into a fully-fledged tourism brand for the country. The main task here will be to identify the brand value and brand promise that the tag line evokes, promote these and develop a visual representation in the form of a logo.

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Social Media techniques such as competitions, quizzes and exclusive discounts are employed to keep the users interest and encourage them to visit the site frequently. If employed efficiently, social media provides strong support to traditional forms of marketing.

Inadequate Advertising

Destination advertising can be expensive and its effectiveness is often difficult to measure. It should be used sparingly and strategically. The new portal looks comprehensive with a lot of information. However, this information should be organised according to the interest of the different category of readers. As mentioned above, different consumers of tourism information will consult the website, including people interested in building-up trading relationships with Ugandan tourism service providers and journalists looking for facts and news and photos to include in articles.

The general tourist or potential tourist is interested in information about attractions and practical details about holidaying in the country. There is a need for three sections to be clearly developed to address the requirements of each of these interest groups.

The advertising strategy should be clearly thought out and the 'rule of seven' applied (a person needs to see an advert at least seven times before it registers in his or her mind). Objectives should be clear (i.e. building awareness, promoting a specific event, etc.) and advertising channels chosen carefully to ensure that the message reaches the desired market.

Taking just one advertisement in a magazine or on TV or on the radio is unlikely to produce the desired effect. UTB needs to increase its presence and influence on the social media as a form of advertising. Social Media techniques such as competitions, quizzes and exclusive discounts are employed to keep the users interest and encourage them to visit the site frequently. If employed efficiently, social media provides strong support to traditional forms of marketing.

Limited publications and collateral material range

There are too few publications produced by UTB and those that exist are in a magazine format rather than in form of motivational brochures designed to encourage tourists to visit the destination. Publishing ad-hoc magazines and producing ad-hoc collateral materials with limited print- and production-runs is a very expensive and unsustainable way of using publicity material to promote a destination.

There is need for informational brochures and leaflets that provide information of products and services at the destination to enhance the experience of the visitor and to provide practical and background information prior and during their visit. A range of both motivational and informational brochures and leaflets should be produced by UTB and these should be updated and published on a regular basis and widely distributed within Uganda but also outside Uganda at appropriate events (i.e. trade fairs, road shows) and venues (i.e. embassies, tour operator offices etc.). There is also a need for a tourist map of the country, to be distributed by UTB and without charge. Advertising should support the funding of the promotional material development, including touristic maps.

Lack of sales manuals

There is no publication (or online resource) to help tourism professionals who want easy access to information to develop packages with information on Uganda or sell products that are already available. A Sales Manual is designed to help tourism professionals like tour operators and travel agents sell the destination. It should contain important information for them to evaluate different products and service providers in the Uganda and to make decisions on the opportunities that they would like to exploit. The objective is to provide them with a useful and comprehensive buying tool. This would be a valuable tool for tourism promotion.

Lack of media kit

The media kit is an important resource in the PR department. The press kit comprises a set of materials organised for ease of communication to inform people like reporters about the details of the destination by providing information sources, news items and describing any developments and plans. It should be constantly updated and sent to them on a regular basis via a consolidate database of media contacts, and it should be available on the Internet, at the Uganda Tourism website.

Limited participation in Trade Fairs and Exhibitions

Limited funding is a constraint for all UTB's marketing activities but particularly so for trade fairs since it determines whether UTB will or will not attend selected trade fairs. UTB has been attending only two fairs, because of reduced availability of funds but even then, no impact reports are available and limited follow ups have been conducted.

It is important that every person met during the trade fair be contacted to thank them for visiting, ask if they need further information, and to point them toward the UTB website. In most cases Trade fair participants attend without induction training yet it is important in ensuring that participants derive the greatest benefit from the events.

Limited product base diversification

The 2004-2008 Marketing Plan singled out: 'broadening the product appeal beyond the (finite) gorilla experience to encompass larger market segments and longer stay' and 'making the Uganda tourism product more distinctive and more customer focused' as principal challenges facing Uganda's tourism sector.

The World Bank report explained that there are few examples of innovative tourism products which Uganda can competitively market. It argues that neighbouring countries have introduced new types of products over the years to attract visitors and have substantially boosted their visitor numbers as a result (Uganda Tourism Sector Assessment, World Bank, 2012). For instance, Egypt introduced its first commercial Nile cruise in the 1970s, while in the 1980s Zimbabwe launched white water rafting tours on the Zambezi and South Africa re-established its luxury train.

Uganda has the potential to develop and market a wide range of different products but still 95% of packages offered by tour operators are to view wildlife, yet similar products are also sold by other competing countries in addition to their other iconic products. Tanzania, well known for the migration of the wildebeest, offers a hot air balloon service above the Serengeti. Rwanda opened its canopy walk in Nyungwe Forest in 2009 to complement its very successful Gorilla and Golden Monkey tracking programme.

Weak business linkages

One of the main issues faced by the sector is limited inter sectoral business linkages. The cooperation between tourism business operators is not strong. This is partly attributed to business operators along the tourism value chain having limited knowledge and understanding how the package tour market functions. For instance the business linkages between hoteliers and tour operators remain weak.

As a result accommodation suppliers face a challenge of occupancy rates falling around the parks and for some enterprises these rates are becoming dangerously low. Hotel owners however are reluctant to manipulate pricing as a strategy to attract more business. They need to augment their products by including additional services at no extra cost such as spa treatments, buffet lunches etc. thus eroding revenue streams that the lodges previously relied on.

Uganda's brand needs restoring and improved management in order for the country to be portrayed positively through the tourism brand.

Weak Public/Private and Public/Public Partnerships

The Success of FAM trips requires high level coordination and cooperation between both public and private stakeholders in the tourism sector. Each stakeholder needs to contribute to the success of the venture, either financially or in kind in the form of free or discounted flights, accommodation, transport and meals as well as free guiding services and entrances at attractions and cultural sites.

The partnerships are weak making it very difficult to obtain cooperation with the service providers because they either charge the full rack rate or only give a small concession. Thus there is a need for industry stakeholders to agree a formula for fam trips that will benefit all parties. An annual contribution to UTB's budget should be agreed and formalised in memoranda of understanding with organisations such as UWA, the Civil Aviation Authority, the trade associations and others.

Limited travel information and online booking facilities

Uganda as a destination faces a challenge of limited signage to guide visitors to and around tourist attractions, and often lack pinned price list of services (entrance fee, guiding service, etc.) at attractions. Maps of cities or of the country are not freely available (although they can be bought in book stores). Advance booking and payment for facilities such as accommodation is difficult as not many hotels and guesthouses have online booking and payment facilities. There are few online tools and apps that tourists can use to plan a trip.

This situation does not entice tourists especially Free Independent Travellers (FIT) who want to organise their own holiday in Uganda. For non-Ugandans, the situation is compounded by the not well organised public transport system which makes getting around the country very difficult.

Negative image of Uganda in tourist generating countries

Most studies indicate that Uganda either has a weak image in generating countries or a negative image based on historical events and on recent news items. The World Bank 2012 report explains that 'dictatorships, civil war, and regional violence have taken their toll on Uganda's image. While these are a product of the past, negative images still persist in the source markets. The 2012 YouTube video that exposed the plight of children recruited to Joseph Kony's rebel army and the images of refugees pouring into Uganda from the DRC have been broadcast worldwide and dealt further damage to Uganda's image.

Uganda's brand needs restoring and improved management in order for the country to be portrayed positively through the tourism brand. Uganda has lessons to learn from other countries such as South Africa, Rwanda and Vietnam that have successfully turned around their poor image to become popular tourism destinations.

Lack of a crisis management system

There is no specific system through which crisis is managed when it occurs. For instance tour operators (interviewed during the design of this master plan) complained about Government not promptly reacting to news footage broadcasted around the world depicting the country in a negative image such as showing large influxes of refugees entering Uganda. Tour operators have suffered many cancellations since the potential visitors are not reassured that Uganda is safe and that the refugee camps are not located anywhere near tourist sites that they may visit. Therefore there is a need for a PR crisis management system to be put in place.

2.4 Infrastructure Development

2.4.1 Introduction

Infrastructure development plays an important role in determining the level of tourism development. It should however be noted that as much as infrastructure facilitates tourism development, some infrastructural developments may become tourist attractions in themselves such as bridges, dams, and stop over points. For a destination to exploit its resources there is need for appropriate infrastructure in place in terms of a transport network (roads, air water and railway transport), hospitality facilities (accommodation facilities, restaurants) and support infrastructure (power, water, internet, signage etc).

The level and quality of infrastructural development also determines level of tourists' satisfaction and influences the choice of destination. The insufficient quality of transport within Uganda was the top cause of dissatisfaction cited by international tourists visiting the country (World Bank, 2013).

2.4.2 Road transport infrastructure

Roads are the major means of transport used in Uganda and they provide the principal arteries of movement and access around the country. The primary national road network system is managed by the Uganda National Roads Authority (UNRA) an autonomous agency regulated by the Ministry of Works and Transport. The other roads are classified as District, Urban and Community Access Roads (DUCAR) and their responsibility lies with the districts and municipalities.

The current road network is approximately 21,000km of paved and unpaved roads and only a very small percentage of these roads are dual carriageway – largely in Kampala and Entebbe. The current network of the national road infrastructure is shown in Figure 2.6.

Much of the existing paved road network is located in the radial routes that emanate from Kampala/Entebbe (Figure 2.6) and offer the opportunity for a range of circuits beginning and ending at the international airport and capital city. Although some major roads to key towns in tourist areas in South and western Uganda are paved, there is a general lack of a comprehensive, integrated and continuous paved road network across the country that would provide vital linkages between the major tourism areas such as National Parks.

Paved roads are mainly lacking in the North and North-East of Uganda. Some DUCAR roads provide important connections between the national road network and tourism areas. However since these roads pass through more than one district, continuity of maintenance and road quality is not guaranteed since each district has different priorities.



Figure: 2. 6 Existing Road Network

Within the protected areas (National Parks, wildlife reserves), the Uganda Wildlife Authority (UWA) is responsible for most of the infrastructure including the majority of roads, bridges water and power supply. The condition of the roads in protected areas varies particularly in the rainy season, where the condition of the roads deteriorates yet resources for maintaining the roads in good condition are insufficient. However some roads into or crossing the parks are national roads, and are therefore under UNRA. Some of these roads providing important access to key tourist sites are in poor condition, for example:

- Roads around Bwindi Impenetrable and Mgahinga National Park
- The route from Kasese to Nyakalengija that allows tourists to access Rwenzori Mountains National Park;
- Access road between Bwindi Impenetrable and Queen Elizabeth National Parks

As a result of the poor road network, tourists visiting these attractions, spend a great proportion of their stay in Uganda travelling in uncomfortable conditions, limiting their desire and available time to visit additional destinations.

The poor condition of these roads constrains access to the most important parks (Figure 2.5), but also prevents the growth and development of destinations that are not well connected to the transport network. Kidepo Valley National Park is one of the country's most attractive parks but is difficult to access and has a travel time by road of typically, 12 hours or more from Kampala.



Figure: 2. 7 Approach road to Mgahinga Gorilla National Park in poor condition

There are on-going efforts to improve the road network (Figure 2.8 and 2.9) especially in key tourism areas. In 2012 government developed a prioritised list of transport projects for short and medium term funding.



Figure: 2. 8 New road from Kabale to Kisoro, South West Uganda

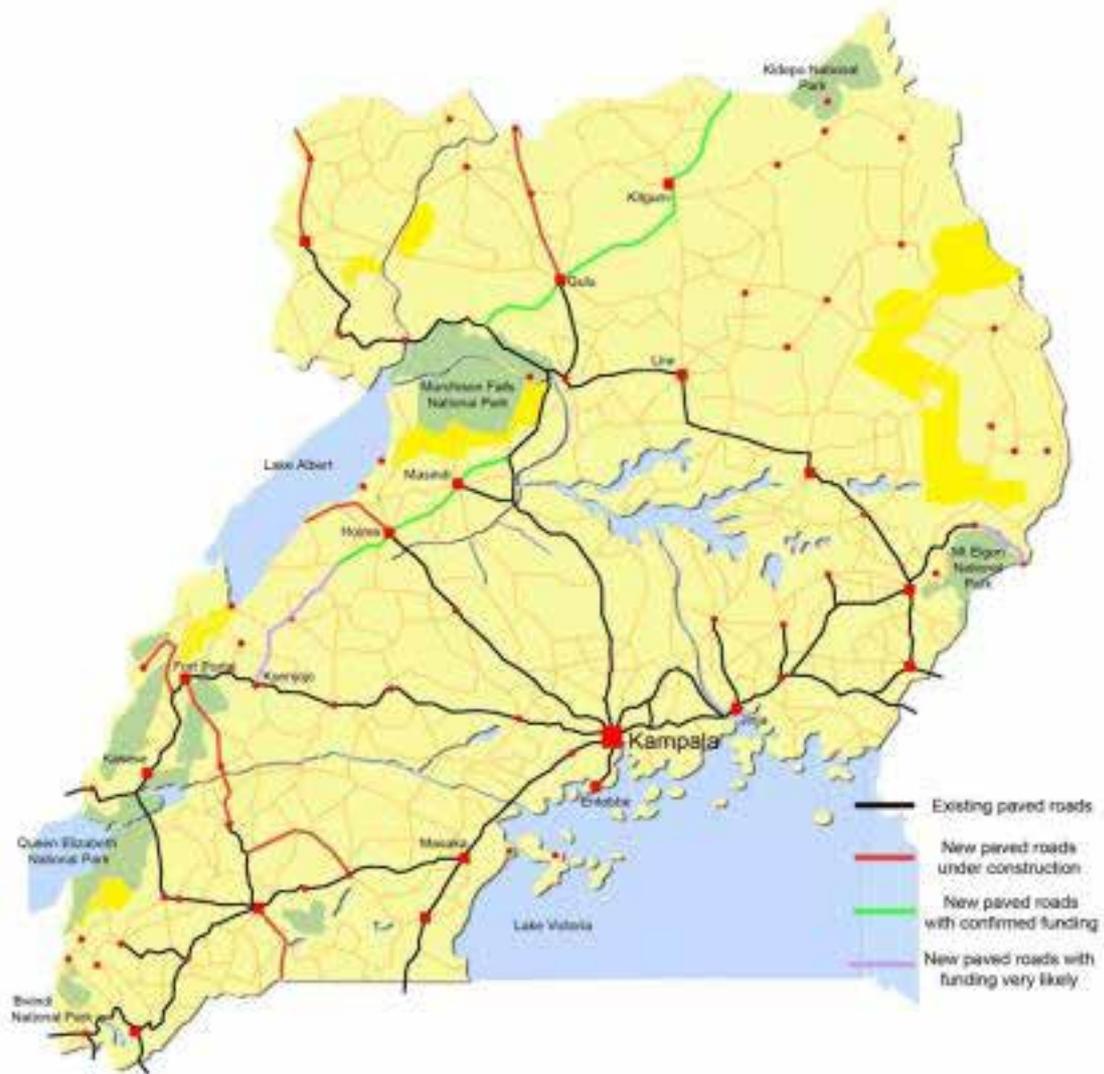


Figure: 2. 9 Existing Road Network and Planned Improvements by UNRA

In 2012, government set to identify specific ‘Tourism Roads’ projects that would assist the tourism sector. Tourism roads are defined as roads outside of the park areas that facilitate access to and between parks and other tourist sites. As part of this overall initiative, a forum to discuss Tourist Roads was held with public and private sector representatives of the tourism industry and identified 18 priority tourism roads that were categorised into three (Table 2.7 and Figure 2.10)

Table 2. 7 Prioritised Tourism Roads from Roads Forum Report

	Route	Priority	Length / km
1	Kisoro – Mgahinga	1	16
2	Rukungiri – Kihhihi – Ishasha	1	74
3	Ishasha – Katunguru	2	88
4A	Kyenjojo –Kabwoya	1	101
4B	Kabwoya – Kigumba	1	134
5	Hoima – Bugungu Gate	2	111
6	Masindi – Kichumbanyobo Gate	1	18
7	Olwiyo – Gulu	2	61
8	Gulu – Kitgum	2	105
9	Gulu – Fort Patiko	2	28
10	Kitgum – Orom	3	77
11	Orom – Park Gate	3	71
12	Apoka Lodge – Kotido	3	136
13	Kotido – Moroto	3	93
14	Moroto – Nakapiripirit	3	86
15	Nakapiripirit – Muyembe	3	90
16	Kapchorwa – Park Boundary	3	8
17	Budadiri – Park Boundary	3	10
18	Mbale/ Tororo – Bududa – Park Boundary	3	20

Source: Tourist Roads Forum Report

In addition to the roads in the priority list, there are additional roads in the south west of Uganda that are currently included in the Contractor Facilitated Financing (CFF) proposals in UNRA's Detailed Development Budget Estimates for 2013/14 (Table 2.8).

Table 2. 8 CFF Tourist Roads in UNRA's Detailed Development Budget Estimates for 2013/14

	Route	Priority	Length / km	Notes / funding
A	Hamurwa - Kanunugu	1	32	CFF
B	Hamayanga – Ikumba	2	50	CFF
C	Haruntenga – Buhoma	1	30	CFF
D	Kabale-Bunyoni	1	8	CFF
E	Kisoro-Nkuringo / Bwindi	2	40	CFF

Source: UNRA

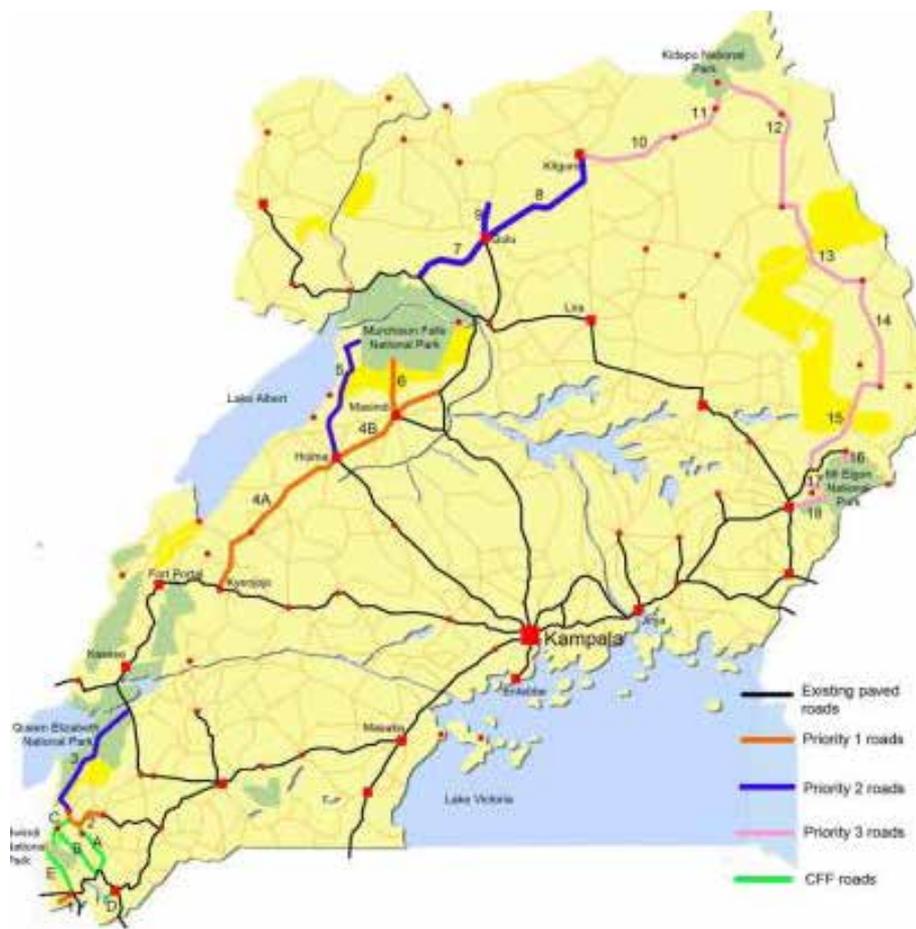


Figure: 2. 10 Roads Forum Report, Priority 1, 2 & 3 roads, and additional CFF roads

The proposed paved roads within the UNRA detailed development budget estimates 2013 / 2014 indicate the aspiration for significant improvements of the national road network in many parts of Uganda, (including in the north and east of the country). However, overall budgets for the identified programme of national road improvements are insufficient to carry out all the works at once and the time scale for their implementation has not been established.

It is therefore vital that MoTWA continues to monitor on-going road improvements and engage MoFPED and MoWT via the Tourism Sector Working Group to ensure urgent delivery of the prioritised tourism roads.

Once constructed and well maintained the roads will form an integrated and comprehensive circuit around Uganda that will not only enable more efficient and comfortable passage of tourists, provide enhanced access tourism sites and resources, but also provide a physical infrastructure framework that would socio-economically benefit the local populations in the respective areas.

In order to fully support tourism and enhance visitor experience the road network system needs to be complemented by other facilities such as rest stops, restaurants, dedicated tourist bus services, proper signage among others.

Rest Stops and Facilities

Tourist Road stops offer an important service to travellers, particularly those plying long routes with information, refreshment and sanitary facilities. These rest stops are often located in scenic spots along the route and benefit the local communities that trade and service these points.

There is a critical gap in the provision and quality of these rest stops along the tourist routes. There is debate on who has the responsibility to provide these facilities. While the private sector has invested in some stop over points, it is evident that some areas that lack economic viability require a government intervention or a partnership to establish the facilities. Though government support to the development of stop over points has been limited, government has a role of guiding and regulating their standards of development.

Signage

The provision of information and directional signage is helpful in promoting and accessing the tourist attractions in a particular area. The overall assessment of the tourist infrastructure points to a critical inadequacy in the provision of signage. In some areas signage exists but it does not often communicate adequately the qualities and facilities of the tourist site concerned. For instance the directional signage for Itanda Falls, one of the most scenic waterfalls near Jinja town and the information billboard at the Source of the Nile (Figure 2.11) is an illustration of the problem. The informational signage used for the Source of the Nile site incorporates a sponsorship logo that is inappropriately large and inconsistent with the image and historical importance of the site. Furthermore the signage is positioned in a location where it blocks a very important and attractive view of the 'Source' it describes.

It is vital that MoTWA continues to monitor on-going road improvements and engage MoFPED and MoWT via the Tourism Sector Working Group to ensure urgent delivery of the prioritised tourism roads.



Figure: 2. 11 : Directional signage on the road to Itanda Falls and Informational signage at The Source of the Nile site, Jinja

Directional signage on the main highways, although more consistent in design and appearance, it is often confusing and fails to offer adequate information and precise direction to existing attractions. Local road signs exist in some areas but they are mostly inconsistent in design and appearance, often poorly sited and frequently compete for attention with a number of other advertising billboards. Some signage exists in protected areas but it is still limited.

This confusing situation is often exacerbated at night when poor levels of illumination render most signage invisible from a distance. The installation and replacement of proper signage has in most cases been hampered the illegal removal and theft of metal signs. The use of alternative synthetic materials, less attractive to vandalism, needs to be explored.

Dedicated tourist bus service

There is currently no dedicated tourist bus service to key tourism areas in Uganda except the one being promoted by UWA to the national parks. This service offers an additional and more convenient mechanism for accessing key tourist sites than is currently available through public transport options. This creates a potentially attractive business opportunity for the private sector and also a potential to increase the number of visitors to key tourism areas.

2.4.3 Air transport

There are approximately 60 licensed airfields in Uganda, with 30 currently in use and 19 having regular services. The Civil Aviation Authority (CAA) is responsible for Entebbe International Airport and 13 of the upcountry airfields. Entebbe international airport is the key entry point for tourists in Uganda and with some modifications to taxiways and parking areas, the airport could accommodate aircraft sizes up to the A-380 freighter. In 2011, the airport had 1.2 million passengers, well within the capacity of the current facilities of around 2.5 million passengers per annum.

Major improvements were carried out to the passenger terminal in 2006 / 07. However any further expansion will require the development of a second passenger terminal, and such major airport expansion requires a long lead time for planning and construction. The expansion project is currently in the feasibility stages. Convenient access to and from Entebbe airport is an important issue, particularly for tourist visitors. Road access to and from the airport must currently go along the Entebbe – Kampala road, and pass through the built up area of Kampala, Traffic congestion, particularly at peak times, is very severe, resulting in long journey times to Kampala, despite the relatively short distance involved. The proposed Entebbe – Kampala Expressway, a toll road, will provide an alternative route and help to ease this congestion.

CAA has responsibility for 13 upcountry airports. Five of these (Table 2.9) have been proposed as international arrival/exit points, although they are not currently fully equipped to function as such. However, CAA has a programme of planned improvements to bring them up to the appropriate standards, including the consideration of tourism requirements where applicable. The eight other CAA airfields are at Jinja; Soroti; Tororo; Moroto; Lira; Masindi; Kisoro and Mbarara, though most of them are not fully operational and need upgrading.

Table: 2. 9 Existing Runway Details for Airfields Being Considered for International Traffic

Airfield	Existing runway length/m	Surface
Arua	1800	Marrum
Gulu	3100	Paved
Pakuba	1700	Marrum
Kidepo	1500	Marrum
Kasese	1500	Grass

Source: CAA

The CAA has proposals for upgrading the airfields which would create opportunity for new arrival points for tourists and bring them closer to the principal tourist attraction sites. This would enable larger planes to use the routes, offering the scope for improved domestic air services, which at present are on a modest scale and in most cases prohibitively expensive. Better air transport facilities, more domestic air travel and more open competition should help to reduce prices of air travel.

2.4.4 Railway transport

Rail transport formerly served as Uganda's lifeline, providing the main transport link for imports and exports from Mombasa seaport, and linking with water transport services at Port Bell, Jinja (Figure 2.10) and Namasagali. But from the 1970s, traffic was steadily lost to road transport, and a vicious circle of decline set in as finances deteriorated, investment and maintenance in track and rolling stock were cut back, services became slow and unreliable, unit costs rose, and rail became increasingly uncompetitive.

The Ugandan railway network once comprised 1,266km of narrow gauge track extending from Malaba, on the Kenyan border to Western Uganda. Currently there are only 337km of railway in operation, to the east of Kampala. There are two principal lines that are currently used for only freight. The first runs west from Malaba, via Jinja and Kampala, terminating at Kasese, adjacent to Queen Elizabeth National Park.

The second has only recently been re-opened and heads north, running close to Mt. Elgon National Park, and then heads north-west via Lira and Gulu, running close to the northern boundary of Murchison Falls National Park, before terminating at Pakwach. It should be noted that the existing rail network has narrow gauge tracks, with no passenger service, and without train stopover stations in key tourist areas.

Passenger services on the Uganda railway network ceased in 1998, although Rift Valley Railways are currently refurbishing five passenger coaches with the intention of reinstating a limited service within Kampala. However, the railway network is bound to increase under the Northern Corridor integration project – a regional joint initiative by Kenya, Uganda, Rwanda and South Sudan to jointly construct and operate a new and modern standard gauge line from Mombasa, connecting to Nairobi, Kampala, Kigali and Juba. The new rail network will offer the potential for the reinstatement of passenger services and there is need to ensure that the rail linkages serve tourist sites along the re-established routes.



Figure 2. 12 Operational railway tracks by the Nile at Jinja

2.4.5 Water transport

Waterways

Although about 25% of Uganda's surface area is covered by water, there are still limited water transport facilities on its major lakes viz. Lake Victoria (the largest lake in Africa and the second largest freshwater body in the world and is shared by Uganda, Tanzania and Kenya); Lakes Albert, Edward and George which lie close to the border with DRC and the marshy Lake Kyoga lies in the centre of the country. The major river is the Nile which passes through Lake Kyoga and Lake Albert via Murchison Falls National Park to Southern Sudan.

Inland water transport services in Uganda are provided in various modes which include:

- **Rail wagon ferry services on Lake Victoria**

For many years a useful role in the transport system was played by the wagon ferries on Lake Victoria, which carried loaded railway wagons between Port Bell, Jinja, Kisumu, and Musoma, with direct roll-on roll-off transfer to rail at the ports. Uganda Railways Corporation (URC) formerly had three wagon ferries, the 'Pamba', the 'Kaawa' and the 'Kabalega', built in 1984/85 for operations on Lake Victoria, and sailing mainly between Port Bell and Mwanza in Tanzania and Kisumu in Kenya. Following the sinking of one of the Ugandan vessels in 2005, the other two were withdrawn from service owing to insurance problems, and have not yet regained their seaworthiness certificates.

- **Passenger and vehicle ferry services**

These are short distance ferries at several river and lake crossing points around the country that connect adjacent parts of the road network. These include:

- Bukakata – Luku (Lake Victoria: mainland to Buggala Island, Ssesse Islands)
- Nakiwogo– Buggala island (Lake Victoria: mainland to Ssesse Islands)
- Nakiwogo – Kyanvubu (Lake Victoria)
- Kiyindi – Buvuma (Lake Victoria)
- Masindi Port – Kungu (Victoria Nile)
- Paraa ferry (Victoria Nile, within MFNP, and operated by UWA)
- Wanseko – Panyimur (on Lake Albert)
- Laropi – Umi (Albert Nile).

- **Small-scale tourist services**

A range of boat trips for tourists are available, including:

- Entebbe - Ngamba Island (chimpanzee sanctuary);
- Murchison Falls National Park – from Paraa up the Nile to the falls;
- Jinja – boat trips to the source of the Nile;
- North of Jinja – Nile cruises;
- Queen Elizabeth National Park – launch trips along the Kazinga Channel

- **Informal small boat or canoe services**

Water transport is provided by small informal sector operators on the lakes and rivers, normally using small boats or motorised canoes. These have typical capacities of about 15 passengers, but are often heavily over-loaded. They also carry goods and livestock, together with passengers in the same haul.

No estimates are available of total passenger and cargo volumes, but they

provide the only means of transport to many small islands, and are often the only normal means of access between, for instance, the northern and southern shores of Lake Kyoga. Whilst they may occasionally be used by tourists that is not their primary role and cannot be seen as a significant component of the tourism infrastructure of movement and access within Uganda. They are largely unregulated and therefore safety standards are very inconsistent.

In overall there are very few tourism-orientated water transport services or water-borne linkages to provide strategic connection between different tourism areas. This has mainly been as a result of: lack of hydrographic surveys to map all the lakes and navigable water ways; limited infrastructure of docking and landing piers in key tourist areas; inadequate public ferry transportation on most of the major water ways; and high cost of water transportation. Therefore water travel should be given priority to provide facilities and identify potential new tourist circuits and water based activities.

2.4.6 Utilities

Utilities constitute critical infrastructure that supports tourism development and these include power, water, waste management and Information Communication Technology (ICT).

Power

Power supply in Uganda mainly comes from a mix of hydro and thermal power generation plants. UBOS (2012) records that the total installed capacity of electric power plants that fed into the national grid increased from 539 Mega Watts (MW) in 2010 to 569MW in 2011. The main hydro plants are; Bujagali Falls (250MW), Kiira (200 MW) and Nalubale (200MW). There are nine other substantial hydro plants throughout Uganda and several more planned, including Ayago (planned for 2023), and Karuma (2020) which is intended to provide an additional 600MW. The Katwe thermal plant is due for completion in 2015, and will provide 150MW. There are six other thermal plants throughout Uganda.

Despite the increasing amount of power generated, it is still inadequate and unequally distributed across the country, an aspect that adversely affects tourism operations and development. Out of the 10 National Parks only five currently have direct access to the grid: Mt Elgon, Queen Elizabeth, Rwenzori Mountain, Kibale Forest and Semliki National Parks. These connections provide power to the park headquarters and staff accommodation areas. On-grid power is generally not available to the lodges and accommodation providers within the park, with an exception of Mweya lodge in QENP, where the UWA-owned visitor accommodation is also supplied. Individual lodges and accommodation providers within the parks have to generate their own supplies from a mix of solar power and generators.

The lack of access to electricity is constraining tourism development in some important tourism areas including five of the National Parks that are without any on-grid power supply. The high energy costs from generators or alternative energy sources such as solar power, serve as a deterrent to would-be investors and a financial liability for those currently operating in these areas. The high energy generation costs also present a drain on UWA's resources. This situation results higher costs of doing business in upcountry destinations which decreases competitiveness of the country's tourism sector in general.

Water Supply

The National Water and Sewerage Corporation (NWSC) is the main provider of metered water in Uganda, with a total capacity of 318,842 m³ per day. NWSC operates in 23 towns, 19 of which have water treatment works; this represents 75% of the large urban centres (UBOS 2012).

In small towns and rural areas water is generally provided via bore-holes by the Directorate of Water Development (DWD). However in most rural areas there is no piped water and the residents have to fetch untreated water from streams, swamps, rivers and lakes. Tourism establishments in such areas therefore always have to 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.

In the National Parks UWA is responsible for the supply of water which is provided from a mix of piped supply, boreholes, river/lake extraction, and rainwater harvesting sources, depending on the most suitable available source. Currently, two of the National Parks have a piped water supply, provided from adjacent towns. Rwenzori Mountain is linked to the Kasese supply network and Mt. Elgon is linked to the supply of Mbale. Many of the parks have lakes and rivers that provide a water supply for the park headquarters and staff accommodation, combined with water treatment facilities. For example QENP gets water from the Kazinga Channel, MFNP from the Nile and Kibale Forest from a crater lake. At Lake Mburo, they use bowsers to transport water to a reservoir adjacent to the park headquarters.

In Kidepo NP, where there is no surface supply available all year round - as the rivers are seasonal - bore holes are used, although these also sometimes run dry, and therefore there is a reservoir tank to provide a back-up supply. A few of the lodges tap into the UWA supply network, including Mweya at QENP and Apoca lodge at Kidepo NP. On overall unreliable power and clean water supply is still a major challenge in many tourism areas especially in rural destinations. This results in high operating costs for existing establishments which invest in alternative energy and water sources, negatively affects quality service delivery and limits tourism investment in potential tourism areas.

Waste Management facilities

Within the protected areas there are guidelines for waste management set by UWA. They provide guidance to UWA staff, planners, concessionaires, contractors, subcontractors, clients and suppliers to act co-operatively in order to reduce any form of waste arising from their activities and to improve the manner in which any waste generated is managed.

Both general and specific guidance are provided in relation to the preparation of site specific waste management plans with the aim to minimize waste generation and the environment impact of waste treatment and disposal. All generators of waste must have a waste management plan, which provides regular monitoring reports and waste tracking. In particularly sensitive areas, all waste material should be removed and disposed outside the protected area.

However in areas outside protected areas the various establishments are not closely monitored to ensure that their waste is properly managed. As a result both solid and liquid waste from urban areas, industries, hotels etc. is not adequately collected and disposed leading to pollution of the environment. Water pollution is the most prevalent and this is not only negatively affects aquatic biodiversity but also affects the water based tourism activities.

Information Communication Technology (ICT)

There are currently seven mobile telecom network operators in Uganda, who implement the communications network, providing phone and internet services. However the mobile companies, who are driven primarily by competition and profit, usually go where revenue is expected to be high. As a result many areas, particularly in National Parks (such as Kipedo National Park) and remote areas such as in Kalangala islands have inadequate ICT network. Business owners in these areas face very high ICT costs and those in tourism business are unable to provide ICT services to their clients. With limited and unreliable internet connectivity, tourism establishments are constrained in adopting e-business technologies and they are unable to efficiently market themselves and adequately respond to online tourist inquiries.

There is good mobile phone coverage in most parks, although there are blind spots, particularly in some areas and the quality and effectiveness of the signal varies depending on the service provider. There are parts of the park area where there is no signal on any network, which is a safety concern in light of the potential emergency situations that might arise within a game drive or other tourist activities.

The park offices have a satellite connection to a Wider Area Network (WAN), which provides a linkage to the HQ offices in Kampala, where the main server is located. A Local Area Network (LAN) within the park provides the local connection onto the system. There are also satellites at the entry gates, providing internet access to deal with the cash-less Wildlife Card system being introduced. Solar panels are also installed to provide the power for the necessary computer services. UWA are implementing proposals to install IP phones at the park that will allow a phone handset to be connected via a computer to the WAN.

However, the National Information Technology Authority Uganda (NITA-U) is currently implementing a backbone infrastructure (in three phases), comprising optical fibre cables linking to most district centres. Once the backbone is in place, links from the backbone to individual facilities will be put in by the private sector. Currently priority is being given to hospitals and schools, not tourism, an issue MoTWA needs to be raised with NITA-U. More so, using the Rural Communication Development Fund (RCDF) government can interest telecom companies to serve communities with phone services in specific locations that are not otherwise economically viable. The RCDF is funded by a levy from the telecom companies which is set at 2% of their gross annual revenue.



2.4.7 Accommodation and visitor facilities

In the past decade, the provision and supply of accommodation in Uganda has grown significantly. Whilst there is only limited data to enable an appraisal of growth over recent years, Table 2.10 indicates the rate of growth between 2005 and 2008.

Table: 2. 10 Accommodation Provision in Uganda, 2005 - 2008

	2005	2007	2008
No. of rooms available	534,117	801,176	1,255,175
No. of bed spaces	788,614	946,337	1,656,089
Room nights sold	251,990	282,931	377,241
Bed nights sold	284,857	314,812	475,366
Occupancy rate : room	44.6%	35.3%	30.1%
Occupancy rate: bed	33.1%	33.3%	28.7%

Source: UBOS 2011 / Tourism Uganda Draft Marketing Strategy 2011-2016

Statistics from UBOS (2011) indicate that there were 64,602 enterprises in the accommodation and restaurant sub-sector, of which 36,413 (56%) were restaurants, bars and mobile food services, 3,876 (6%) provided accommodation and 24,313 (38%) provided event and other food services.

This is consistent with a more recent survey from 2012, by MoTWA, which records a total of 3,913 accommodation establishments. The accommodation facilities also provide conference, boardrooms and exhibition hall facilities. The Central Region has the greatest space and capacity accounting for more than 50% of the total.

The accommodation, by type and region from the full record of MoTWA information, indicates that accommodation facilities is unevenly distributed, with 47% in the central region, 23% in western region, 18% in Eastern region and 12% in the northern region. It is recognised that the majority of this accommodation is not part of the conventional tourism accommodation market.

On the basis of face-to-face interviews with a wide sample of hotel staff, it is estimated that 87% of these establishments depend primarily on letting rooms by the hour for their viability (source: Domestic Market survey, UNDP, 2013); only 13% of accommodation (about 500 establishments), might be considered suitable for mainstream tourist provision. However there is lack of accurate and comprehensive accommodation information results from the lack of reliable statistics and systematic data analysis system. Current data on the location, quantity, quality, occupancy levels, facilities and staffing of accommodation in Uganda, recorded and held by MoTWA, is incomplete and fragmented, inhibiting full analysis or breakdown of numbers of rooms and beds within the country.

Information on occupancy is haphazard and occupancy rates have to be estimated. In recognition of this fact, MoTWA is planning to inspect approximately 400 establishments, to be categorised under EAC criteria for the classification of hotels, restaurants and other tourist facilities. Approximately half of these establishments have been inspected to date.

For areas in and around the National Parks, more detailed information is available for accommodation including the number of rooms, and of establishments, as set out in Table 2.11. Under the specific survey criteria used, High End (HE) accommodation is categorised for prices per room above \$100, Medium End (ME) for prices per room between \$50-100, and Low End (LE) for prices per room below \$50. This grading is based on price only, which does not necessarily correlate to the actual quality and standards of the establishment.

Table: 2. 11 Room Provision In and Around National Parks (2012)

	Inside Park				Outside Park				Total
	HE \$100+	ME \$50-100	LE Up to \$50	Sub total	HE \$100+	M ME \$50-100E	L LE Up to \$50E	Sub total	
Murchison Falls NP	157	68	0	225	20	10	11	41	266
Queen Elizabeth NP	132	0	28	160	58	58	117	233	393
Bwindi NP	85	34	15	134	13	0	20	33	167
Kibale NP	19	0	0	19	48	0	4	52	71
Kidepo NP	10	16	0	28	0	5	0	5	33
Lake Mburo NP	0	40	5	45	0	18	40	58	103
Mgahinga NP	0	0	0	0	16	17	0	33	33
Mount Elgon NP	0	0	0	0	4	95	35	134	134
RwenzoriMts NP	0	0	0	0	4	5	30	39	39
Semliki NP	0	0	0	0	0	22	7	29	29
Total Rooms	403	158	48	611	163	230	264	657	1268

Source: MoTWA and UNWTO project team figures

A significant issue that constrains the accommodation development options within the national parks is the concessions that incorporate exclusion zones of 25km around the lodges, which restricts competition, choice and market growth. The easing of restrictions on selective new development in the National Parks is therefore a key objective, and to that end the concessions contracts have recently been redrafted, removing the exclusivity clauses and reducing the length of concession terms. Negotiations regarding the existing concession agreements need to find a mutually beneficial outcome in order for the Parks to attract new investment and begin to realise their full potential.

Evidence on the ground would suggest that occupancy levels are around break-even point, approximately 30%, at the higher end of the market, but that demand is stronger for medium and budget end accommodation. Despite this low occupancy in parts of the market, there is new accommodation being built outside the park areas.

Design controls on buildings outside the park area are much weaker than the standards demanded by UWA within the protected areas themselves, which leads to poor quality buildings being constructed, to the detriment of the overall character of the parks and their wider environment. There is no overall Master Plan to direct where development should take place or co-ordinate the provision of support services.

In general, although Uganda is relatively well endowed with accommodation and services at the high end, especially in the National Parks and in the major conurbations such as

It is therefore important for the tourism master plan to put in place interventions that will ensure that sufficient infrastructure is put in place in form of roads, railways, air and water transport facilities, energy, ICT and water supplies and variety of quality accommodation, conference and visitor information facilities.

Kampala and Entebbe, bed numbers are limited and occupancy rates are low (partly as a result of pricing policy) and have been dropping in recent years in the National Parks. At the mid-market accommodation end accommodation options are limited and few are considered good value for money. At the budget end, although high occupancy rates are reported, there is demand for more good quality accommodation. If Uganda is going to compete successfully with its neighbours, a full range of accommodation catering for different market segments and affordably priced must be available to the market.

Tourism information centres

To enhance visitor experience there is need for support facilities such as tourist information. The availability, quality and effectiveness of tourist information provision within Uganda is generally very weak. It is typified by the Tourist Information Centre (TIC) at Entebbe International Airport, which is inconveniently located and not easily visible to arriving tourists. Even if an arriving tourist manages to locate the centre, it does not provide the quality of information material, such as maps and guides, which would assist visitors who are keen to find out more about the country. Within Kampala itself there are three further TICs, at UTB offices, the National Theatre, and Garden City shopping mall. Rather than being a showcase for the country and its attractions, they have little information available and are more like offices than a highly visible and accessible resource to provide tourists with information that will enhance their experience in Uganda. Outside Kampala, there are further TICs at Lake Katwe, Gulu, Kisoro and Kasese. There is little or no signage to direct visitors to any of these TICs.

Within the protected areas, including the National Parks, there is general lack of useful information about the park, the facilities and services available therein. It is largely left up to individual tour companies and guides to inform their clientele as to what is available to them within the park. The opportunity to provide orientation and information, as well as a focus for the sale of crafts, food, beverages and souvenirs to visitors is generally not being captured. At other tourist locations, such as the Source of the Nile site in Jinja, no meaningful information is provided to put the place into context and give the visitor the opportunity to learn about its significance.

2.4.8 Key issues in tourism infrastructure development

On overall the lack of a comprehensive well-maintained infrastructure network is constraining tourism development in some important tourism areas including the National Parks. Limited paved roads particularly across the country, currently inhibits traffic flows between or to key tourist development areas. This is coupled with lack of adequate purpose-built rest stops that further add to the discomfort of travellers already caused by poor roads. The alternative means of transport such as by water, air and rail are equally under developed.

The inadequacies of the transport infrastructure, together with the unreliability of power, water and ICT supplies, add to the cost of doing business, especially for upcountry tourism operators, resulting in reduced competitiveness. As a result most upcountry tourism areas lack a quality and wide range of accommodation and conference facilities, further contributing to the under development of such areas. It is therefore important for the tourism master plan to put in place interventions that will ensure that sufficient infrastructure is put in place in form of roads, railways, air and water transport facilities, energy, ICT and water supplies and variety of quality accommodation, conference and visitor information facilities.

2.5 Conservation of Natural and Cultural Heritage

2.5.1 Introduction

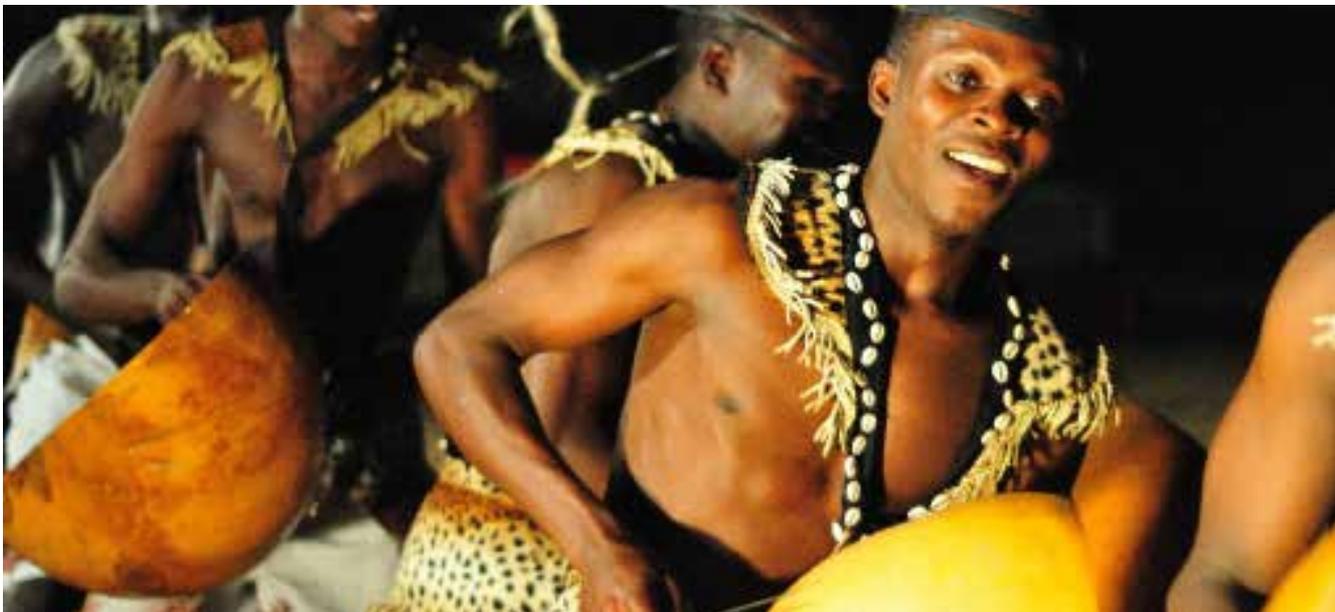
Natural and cultural heritage is very significant to the tourism industry, since it forms the resource base from which different tourist products are developed. Tourism can be employed as an effective force in the conservation of both natural and cultural heritage for the benefit of not only the tourists but also for enhancing the intrinsic ecological values of biodiversity and for economic and socio-cultural development of a given destination.

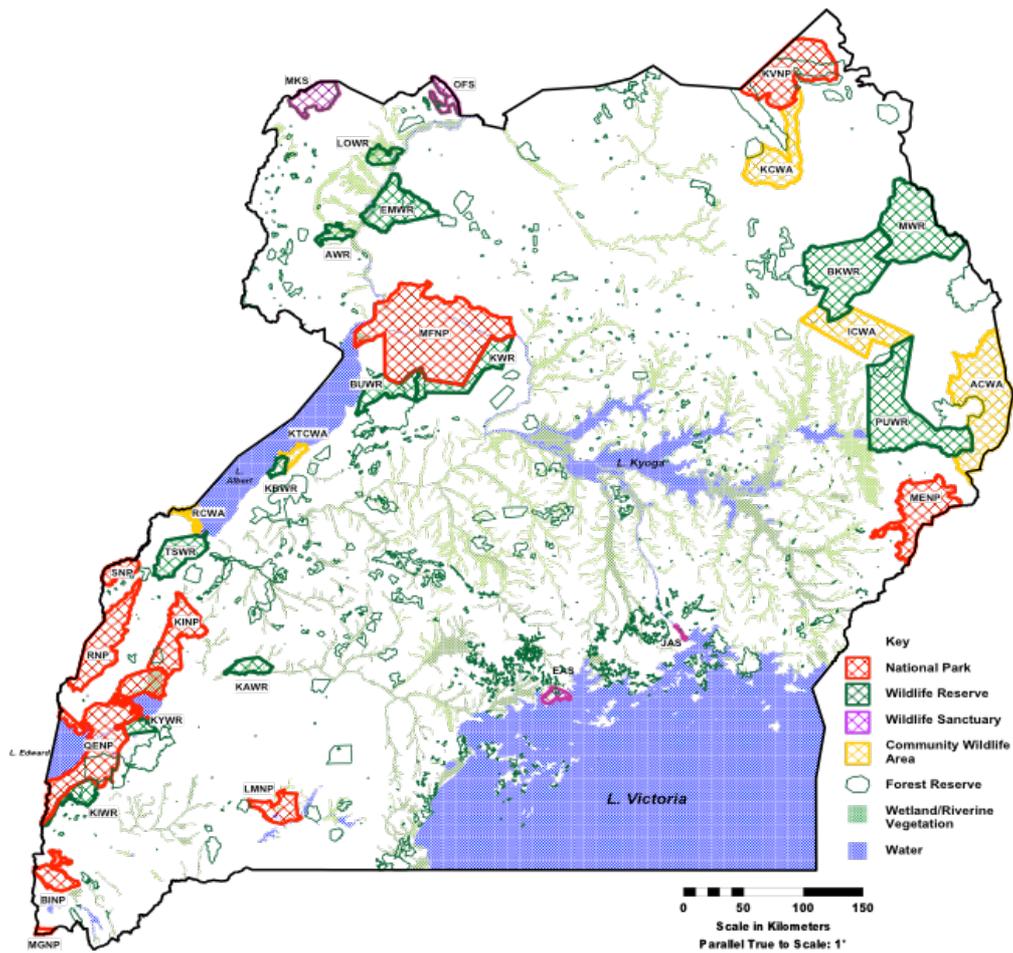
2.5.2 Natural heritage conservation

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 geographic features of Uganda range from glacier-topped mountains, rain forests, savannahs and dry deciduous acacia bush-land to wetlands and swamps. These, along with a wide variation in climate and soils, combine to give the country an impressive range of terrestrial and aquatic ecosystems. With a recorded 18,783 species of fauna and flora, Uganda ranks among the top ten most bio diverse countries globally.

Uganda is host to 53.9% of the World's remaining population of mountain gorillas, 11% (1063 species) of the world's recorded species of birds (50% of Africa's bird species richness), 7.8% (345 species) of the Global Mammal Diversity (39% of Africa's Mammal Richness), 19% (86 species) of Africa's amphibian species and 14%(142 species) of Africa's reptile species richness, 1,249 recorded species of butterflies and 600 species of fish. All these resources and attractions offer a conducive environment and attraction for outdoor activities and support nature-related tourism.

In an effort to conserve this rich natural heritage the government has officially designated a number of Protected Areas, which include 10 National Parks, 12 Wildlife Reserves and 10 Wildlife Sanctuaries, 5 community wildlife areas, 506 central forest reserves and 191 local forest reserves (Figure 2.13).





National Parks (10)		Wildlife Reserves (12)		Community Wildlife Areas (5)		Wildlife Sanctuaries (10)	
1. BINP	Bwindi Impenetrable	1. AWR	Ajais	1. ACWA	Amudat	1. EAS	Entebbe
2. KINP	Kibale	2. BKWR	Bokora Corridor	2. ICWA	Iri	2. JAS	Jinja
3. KVNP	Kidepo Valley	3. BUWR	Bugungu	3. KCWA	Karenga	3. MKS	Mt. Kei
4. LMNP	Lake Mburo	4. EMWR	East Madi	4. KTCWA	Kaiso-Tonya	4. OFS	Otze Forest
5. MENP	Mount. Elgon	5. KAWR	Katonga	5. RCWA	Rwengara	Sanctuaries in QENP/Kyambura	
6. MFNP	Murchison Falls	6. KBWR	Kabwoya			5. KHAS	Kahendero
7. QENP	Queen Elizabeth	7. KWR	Karuma			6. KSAS	Kashaka
8. RNP	Rwenzori Mountains	8. KIWR	Kigezi			7. KYAS	Kyanja
9. SNP	Semliki	9. KYWR	Kyambura			8. KZAS	Kazinga
10. MGN	Mgahinga Gorilla	10. MWR	Matheniko			9. KIAS	Kisenyi
		11. PUWR	Pian-Upe			10. RWAS	Rwenshama
		12. TSWR	Toro –Semliki				

Figure: 2. 13 Protected Areas in Uganda

The National Parks include Bwindi Impenetrable, Kibale Forest, Kidepo Valley, Lake Mburo, Mgahinga Gorilla, Murchison Falls, Mt. Elgon, Rwenzori Mountains, Queen Elizabeth and Semliki. Bwindi Impenetrable and Rwenzori Mountains National Parks are UNESCO designated World Heritage Sites and Mgahinga Gorilla National Park, is on the UNSECO tentative list for designation. Wildlife reserves include: Ajai, Bokora Corridor, Bugungu, East Madi, Katonga, Kabwoya, Karuma, Kigezi, Kyambura, Matheniko, Pian-Upe, and Toro-Semuliki.

Uganda also boasts a number of Lakes (Victoria, Albert Edward, George, and Bunyonyi among others), rivers (Nile, Katonga, Kafu, Semliki among others) and wetlands. A number of wetlands have been listed as 'Wetlands of International Importance' under the Ramsar Convention, which are recognized by Bird Life International as particularly important bird areas, as well as providing a vital habitat for other threatened plants and animals.

To ensure effective management of protected areas, designated National Parks, reserves and sanctuaries are under the administration of the Uganda Wildlife Authority (UWA), which is mandated through the Uganda Wildlife Act (2000) to ensure sustainable management of wildlife resources and supervise wildlife activities in Uganda, both within and outside the Protected Areas. The development policies for National Parks, and associated wildlife reserves, are set out in the General Management Plans (GMPs) for each of the parks. The overarching aim of the GMP is to provide for the sustainable management of the park ecosystem and ensure proper development of tourism infrastructure and facilities in the gazetted areas.

2.5.3 Key issues in natural heritage conservation

Although a number of protected areas have been established they are mainly faced with a challenge of ensuring that they are sustainably managed. Some of them have areas that have been degraded and require restoration; most boundaries are not surveyed and secured and there are no clear guidelines and criteria for gazetting and degazetting of protected areas. As a result, a number of human-wildlife conflicts have resulted over the years. There has been limited institutional capacity both at local and central government level to manage wildlife conflicts in particular and natural resource conservation in general.

More so there limited research and training in natural heritage monitoring, management and conservation. For instance there are limited tourism carrying capacity studies in National Parks and other protected areas. Given the exceptionally limited tourist carrying capacity of some key areas such as gorilla trekking areas, relevant studies should be initiated in order to ensure the sustainable planning of these areas.

It is estimated that over 50% of Uganda's wildlife resources still remain outside designated protected areas, mostly on privately owned land yet there isn't an integrated national management plan for natural heritage outside protected areas. The local communities have limited information and skills on the approaches to apply in order to manage and conserve the natural heritage in a sustainable manner. The situation is compounded by limited awareness of the value of natural heritage resources such wildlife which ends up being killed.

With increasing population and the varied land uses from other economic sectors, natural resources especially wildlife is increasingly being threatened. There is therefore need to develop standards, guidelines and mitigation measures that will ensure that

other economic developments will not have significant negative impacts on the natural heritage resources. The current concern is mainly hinged on the oil and gas exploration in ecologically sensitive protected areas and construction of H.E.P dams along rivers that also have a number of tourism resources and products.

2.5.4 Cultural Heritage Conservation

There are currently approximately 650 designated cultural heritage sites and monuments that have been identified by the department of Museums and Monuments as being of significant value. Out of the 650, a total of 56 sites have been identified as being of national significance (Appendix 2). Notable of these is the Kasubi Tombs site in Kampala (built in 1882) which was inscribed in 2001 as a UNESCO World Heritage Site.

However, in 2010 it was placed on the UNESCO List of World Heritage sites in danger, following a fire that significantly damaged the building structures (restoration work is currently in progress). Several national sites have been recognised by UNESCO as having particular international significance and eight of these sites have been designated on the 'tentative list' for UNESCO World Heritage Site – they include;

- Six rock art sites at Nyero, Mukongoro, Dolwe Island, Kakoro, Komuge and Kapir;
- Archaeological earthworks sites at BigoByaMugenyi, Ntusi and Bwogero; and
- Kibiro Salt Gardens

There are a wide range of cultural heritage sites across various parts of Uganda with potential interest to tourists, but most of them have not been fully identified, mapped and documented. They include: historic sites and buildings (such as churches, cathedrals, mosques, monuments, forts and tombs, slave trade routes, explorer routes); archaeological sites (including rock paintings, stone age settlements and earthworks); traditional shrines, ritual sites and caves.

Apart from the purely physical artefacts and monuments at cultural sites, Uganda has a very rich intangible heritage. By definition intangible heritage is the body of knowledge, traditions, customs, skills, and values that are important in defining peoples, communities and nations. Intangible heritage also includes the crafts, dance, music and languages that are particular to a culture and heritage.

In Uganda, traditional customs and lifestyles are still alive in many parts of Uganda, offering the potential to enhance the depth and range of the tourist experience and their understanding of the culture and heritage of the country. Comprising many ethnic groups, Uganda has over 50 tribes (and about nine indigenous communities) with Bantu-speaking peoples (who dominate much of East, Central and Southern Uganda) and Nilotic-speaking people (who dominate much of Northern Uganda). Pygmies (Batwa and Bambuti) live in the forests of the southwest. It is estimated that there are around 40 different languages in regular and current use in Uganda.

After independence, English became the official language and is taught in schools, used in courts of law and by most newspapers. Swahili has grown in popularity and is spoken and used as a trade language throughout the East African region. Swahili was designated in 2005 by the Ugandan Parliament as the country's second official language. Luganda, spoken by the Baganda people, is the most widely-spoken vernacular language.

Uganda has a variety of other craft products including basketry, mats, ceramics, beads, pottery, hand textiles, woven products, toys, jewellery, bags, ornaments, leather products, batiks and wood crafts. These items are produced in almost all the districts and regions of Uganda, using locally available raw materials like papyrus, raffia, palm leaves, jute fibre and recycled materials like paper and plastic straws with some differentiation based on the specific culture, history and traditions of the area.

Currently most of the handicrafts are sold domestically to local buyers and tourists, with a few being exported to the USA, Canada, Australia, Germany, Denmark, Italy, the UK and Japan. However, most craft products sold in the main tourist areas are disappointingly lacking in variety and distinctiveness; a high proportion of products offered are usually imported from neighbouring countries, mainly DRC and Kenya.

As in many African countries, dance is an important part of ceremonies and special occasions and the different ethnic groups have their own special dances. Religion also plays a central role in daily life in Uganda. Over four-fifths of Ugandans are Christian, and around 10% are Muslims, a legacy of the Arab traders who came here in the 19th century. Religious festivals attract large numbers of domestic visitors, and major events such as the annual Namugongo Martyrs commemoration (June 3) draw visitors from around the world. As well as praying to the Christian or Muslim God, traditional beliefs and customs sit alongside more conventional religions. Many shrines to the spirits are still in active use.

UNESCO has formally recognised the significance of Uganda's intangible heritage with the craft of making bark cloth being formally designated, and the safeguarding of Bigwala, gourd trumpet music and the dance of the Busoga Kingdom. Bark cloth is still highly recognized among the Baganda community as a marker of their specific political and cultural traditions. In recent years, the production of bark cloth has been particularly encouraged and promoted in the Buganda kingdom where it is particular worn on cultural and spiritual functions.

The mandate to conserve, manage and protect the cultural and heritage assets in Uganda is with the Department of Museum and Monuments in the Ministry of Tourism Wildlife and Antiquities (MoTWA). The Historical Monuments Act (1967) provides for the "...preservation and protection of historic monuments and objects of archaeological, paleontological, ethnographical and traditional interest....".It offers a legal framework for the preservation, protection and promotion of cultural heritage.

The Museum and Monuments Department currently has responsibility for two museums: The National Museum of Uganda (the oldest in East Africa, having been formally established in 1908) and the Moroto Museum (a community museum focussed on Karamoja culture). A third museum is shortly to be completed at Kabale, promoting the traditional Kikiga homestead, and a further museum is intended to be part of the restoration of Fort Lugard.

Over the years the local communities and the private sector are increasingly playing a significant role in the cultural heritage conservation. It is estimated that there are approximately 25 local community museums throughout Uganda, including the Museum of Acholi Art and Culture in Kitgum; the St Luke's Community Museum in Rakai; Wakiso (Kawere African Museum); Isingiro (Ankore Cultural Drama Actors Museum), Jinja (Cultural Research Centre Museum); and Soroti (Iteso Cultural Union Museum).

These local museums are preserving the particular culture and heritage of the different parts of Uganda and reinforcing the role and significance of culture and heritage in everyday society. Some members of the private sector have invested in cultural centres and museums such as the Igongo Museum in Mbarara.

The cultural institutions also play a vital role in preserving and maintaining the cultural values and customs. At the forefront have mainly been the traditional kingdoms of Buganda; Bunyoro-Kitara; Busoga; and Toro that play an important role in Ugandan culture and life today.

2.5.5 Key issues in cultural heritage conservation

Although the preservation, protection and promotion cultural heritage assets are catered for under the 1967 Historical Monuments Act, there has been lack of policy and regulatory guidelines to enable the full implementation of the act. The current law on Museums and Monuments is therefore weak especially on issues of penalty for vandalizing cultural sites and monuments, preventing illicit trafficking of antiques and encroachment on land of cultural assets.

This has led to international crime of illicit trade in antiques of national interest such as Sculptures, paintings, and ethnographic materials. The increasing population pressure and urban development is threatening and in some cases already lead to the destruction of urban historic landscapes and buildings, places with unique and aesthetic architectural cultural and religious values.

On the other hand although over 650 sites and monuments been identified most of them are not fully documented and are yet to be mapped and gazette. Most of the cultural heritage sites within Uganda have no mechanism for recording visitor numbers. The inadequate data and research on artifacts, monument and intangible heritage combined with limited awareness of the economic and social value of cultural heritage by the communities poses a big challenge not only for promoting, conserving and preserving these cultural heritages, but also to the sustainability of the tourism industry in Uganda.

The department of Museum and Monuments which is supposed to oversee the management and protection of cultural and heritage assets in Uganda, is severely constrained by the shortage of both financial and human resources. There are inadequate skills, both in numbers and quality required for management of cultural heritage both at the Department of Museums and Monuments and site level.

The cultural heritage education programs offered by the few educational institutions are quite limited in scope and depth. As a result the majority of the identified sites, including some of those on the tentative list for inscription as World Heritage Sites, and most of the 56 sites designated as of national significance, have very limited, or sometimes no, conservation or protection measures in place. It is inevitable that such lack of protection will result in the irretrievable loss of value of some, or many of these sites. The consequences can be witnessed by recent examples of heritage loss, such as the significant fire damage caused to the Kasubi Tombs site in Kampala and the illegal quarrying of granite from the Nyeru rock art site.

2.6 Product development

2.6.1 Introduction

Tourism products play a key role in attracting tourists to a destination. If a destination is to remain competitive, then tourist experience at the destination need to be enhanced through the fulfilment of the tourism product components (i.e. attractions, image, access and price).

A destination's products need to be continuously improved upon to be able to capture the ever changing interests of the consumers. If appropriately improved upon through branding, products reduce customers' perceived monetary, social or safety risk in buying services. It is important therefore that when developing tourism products, we develop those that will provide tourists with a promise of what to expect from their consumption and generate a trust that their expectations will be met.

2.6.2 Tourism Products in Uganda

Uganda is blessed with a quite exceptional abundance of natural, cultural heritage and historical resources that ought to be the platform for a flourishing tourism sector. It is the only country in the world where the Big Five and the mountain gorillas can be seen. It has the biggest variety of bird species in Africa, the highest mountain range, the biggest lake, the official source of the Nile, numerous wildlife parks and forest reserves, some fascinating cultural heritage and history, complemented by an attractive climate that allows tourism all year round and an exceptionally friendly and hospitable people.

Uganda's tourism is highly nature based with products ranging from inclusive package tours offered by tour operators, conference and post-conference packages organised by specialist MICE agencies, and cultural and community-based products developed by the local community.

2.6.2.1 Organised Leisure Products

According to the World Bank's Economic and Statistical Analysis of Tourism in Uganda, June 2013, only 6% of all tourists and 20% of leisure tourists are package tourists. It is estimated that 95% of packages focus on presenting the wildlife product with just 5% on adventure (hiking, mountaineering, and white river rafting – despite National Geographic ranking the Central Circuit, Ruwenzori Range among the top 15 best hikes in the world), and special interest attractions such as birding, cultural tourism and community-based tourism.

Adventure tourism activities are often offered by local firms that market their products by advertising in publications that are read by tourists already in Uganda. Only a few tour operators offer packages that feature Community Based Tourism (CBT) initiatives (although many claim they do).

2.6.2.2 MICE Products

A study commissioned by UNDP and conducted in May 2013 provides a comprehensive overview of the MICE sector around the world and in Uganda. According to the study Singapore was the top MICE destination in 2011, followed by the USA and Japan. Europe accounted for 55% of total volume, with Africa receiving just 3.8% of total volume. Within Africa, Kampala is the eighth most active city for MICE tourism, on a par with Johannesburg and Mombasa. Although African countries have started marketing

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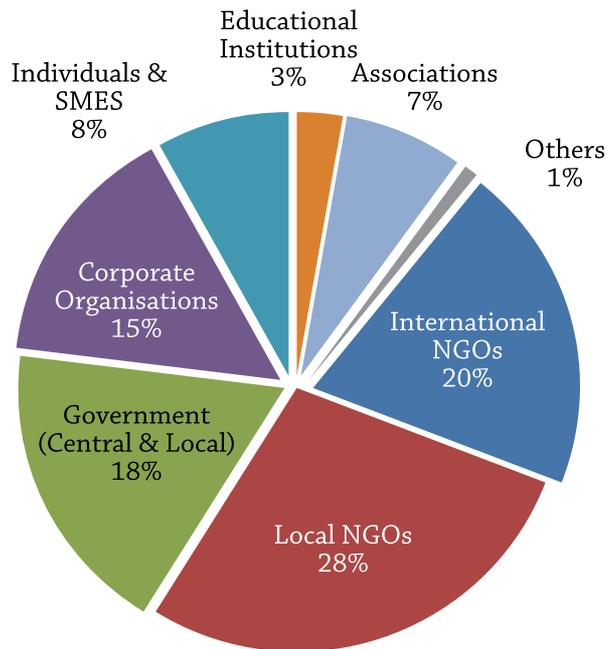
MICE tourism aggressively in recent years, the main constraints have been the size and quality of the venues and the bed capacity in the host cities.

In Uganda, MICE tourism (mainly conferences and meetings) is still small compared to other destinations in Africa, however the potential is promising, since Uganda successfully hosted relatively big events such as Common Wealth of Heads of Government Meetings (CHOGM).

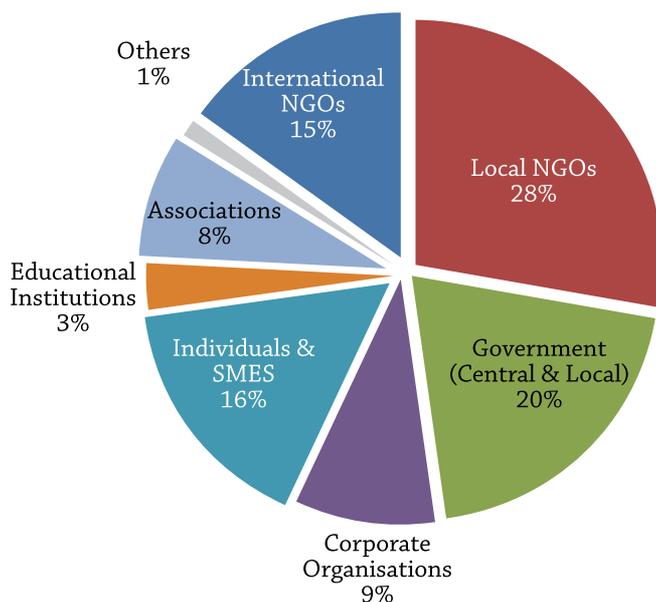
Most international MICE meetings and events are held in Kampala/Entebbe (85%); the overwhelming majority of venues are located in hotels (98%). The Central Region has the greatest space and capacity accounting for more than 50% of the total and presents a greater variety of venue types (i.e. halls, conference rooms, boardrooms exhibition hall etc.) than the other regions in Uganda. It also has year-long business, whereas in other regions MICE events tend to be held at certain times of the year, and are therefore seasonal.

The breakdown of types of MICE meetings and events organised in Uganda in 2011 – 2012 shows that NGOs are the greatest consumers of MICE products as reflected in the figure 2.14 below.

MICE venue buyers in Central Region 2011-2012



MICE venue buyers in Other Region 2011-2012



Source: UNDP Study – Factors affecting the growth of the MICE industry in Uganda, 2013

Figure: 2. 14 MICE Venue Buyers in Uganda

It should be noted that corporate organisations only account for 15% of meetings and events in the Central Region and 9% in the rest of the country. This would suggest that in order to attract international corporate clients, Uganda will need to develop the appropriate quality of venues and facilities and market them aggressively in competition with its neighbours.

Although Uganda does not yet have a Convention Bureau to market its MICE assets, it has a professional trade association, the Events Association of Uganda (EAU). The association reports indicate a sharp growth in business in the last 5 years. Although there is an absence of an industry development plan and support framework, the MICE industry is growing in Uganda thus a justification for re-organisation and investment in the MICE industry.

2.6.2.3 Community-based Tourism Products

Uganda has a growing community-based tourism sector, which provides visitors with an insight into how local Ugandan communities live and work. These are located mostly along the tourism routes and provide products and services such as home stays, village walks, interaction with village personalities such as elders and traditional healers, cookery and handicraft demonstrations, participation in village activities, visits to local attractions with a village guide and cultural performances.

While CBT is growing, it relies heavily on the support of NGOs such as UCOTA and COBATI, as well as international NGOs and local tourist lodges in different parts of the country, which take initiatives to assist local communities.

The protected areas urgently need a programme of restocking, together with planned development of better quality accommodation to suit different markets, more activities to encourage longer stays, and sharper commercial awareness and marketing skills, both among Uganda Wildlife Authority (UWA) staff and lodge operators.

2.6.3 Key Tourism Product Issues

A number of issues are associated with tourism product development in Uganda. These include:

Over reliance on wildlife products

Uganda was once the leading safari destination in Africa in the 1960s, however the many years of civil conflict in the 1970s and 1980s left the animal populations decimated. The wildlife National Parks are still recovering from the devastation they suffered and as a result they do not offer the expected quality of experience. 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. The majority of the Gorilla population is in Uganda though other neighbouring countries like Rwanda and DR Congo have the Gorillas. Its value should not be underestimated in attracting the high-spending international traveller, but the danger of becoming over-reliant on one high-profile product is obvious.

The protected areas urgently need a programme of restocking, together with planned development of better quality accommodation to suit different markets, more activities to encourage longer stays, and sharper commercial awareness and marketing skills, both among Uganda Wildlife Authority (UWA) staff and lodge operators.

Access

The success of a core product depends on the strength of the facilitating and support products to it. Getting to Uganda's main National Parks is a time-consuming and generally uncomfortable experience, and a major disincentive in persuading tourists to choose Uganda over rival destinations. International tourists with limited holiday time do not wish to spend a high proportion of their visit on the road. They are much more likely to choose a destination where something can be seen or done virtually every day. The insufficient quality of transport within Uganda was the top cause of dissatisfaction cited by international tourists (World Bank study, 2013).

The lack of a tarmac road circuit linking the main parks from the neighbouring urban centre has been recognised as a problem for many years. In order to allow the tourism economy to achieve its potential, Government needs to devote the resources needed to complete the remaining gaps in the circuit. Other significant problems that need to be resolved are the lack of airports closer to the main National Parks capable of receiving international traffic, and the limited availability of power, water and ICT for many lodges and hotels in and around the main parks, which considerably raises operating costs and impacts on price competitiveness.

Despite the allure of the name, the Mountains of the Moon (Rwenzori) feature in few international tourists' itineraries, largely because of difficult access, although they have obvious appeal to a mountaineering market. The attractive islands of Lake Victoria are poorly served by ferry or air transport, restricting their obvious potential as weekend leisure destinations, particularly for the domestic market. Mount Elgon and the Virungas are attractive destinations for hiking and climbing, but need better access, investment in more activities, and better marketing. Better access, a bigger range of activities in and around the forest, and better marketing are needed.

MICE Venues

The main constraint is the lack of MICE venues that can accommodate large numbers. The few MICE venues available that can meet international standards are found in Kampala and Entebbe and others scattered in the major towns like Mbarara, Kabale and Soroti. Even those available are hotel based implying that there is no infrastructure that was built purposely for MICE activities.

Investment opportunities / Exclusionism policy

In some of the National Parks such as Queen Elizabeth, investment was threatened by insecurity lead to the government use of a concession approach to encourage investment. The concessions came with monopoly in terms of exclusive zones agreed upon. This approach made accommodation investors to enjoy a wide exclusion zones that severely restricted competition and prevented the investment required in additional to high-quality accommodation options. A review of the concession agreements is essential, together with investment in new activities.

Unplanned Development challenges

In many tourism destinations development is unplanned. The country does not have zones or areas that are well planned and gazetted for tourism development. At many tourism destinations developments are up to the individual developer leading to unplanned developments. At the Source of the Nile for instance, the viewing infrastructure and sightlines are poor, the site is dominated by bargain craft shops, the signage and access are inadequate, and interpretation of the site's historic importance is rudimentary and overshadowed by inappropriate advertising hoardings.

The beautiful Lake Bunyonyi and other big freshwater and crater lakes offer excellent opportunities for cruises, water-sports, lakeside activities and relaxation, but need planned development to guard against environmental destruction.

Untapped tourism potentials

Few countries, can offer snow-capped peaks on the Equator, and such a remarkable range of exotic flora and fauna. Uganda's cultural heritage and fascinating history are undervalued tourism assets for both the general and well-informed visitor. The Kingdoms, Victorian-era explorers, recent history including Idi Amin, the built and intangible heritage and archaeological remains all offer opportunities for telling stories, creating experiences and staging performances that are noticeable only by their absence. Restored colonial-era buildings adapted for tourism uses hold strong appeal for high-spending foreign visitors, as can be seen in many destinations across the Commonwealth. The Nile which is a renowned site for rafting and adventure sports is under-exploited.

The range and quality of native crafts is poor. Rural culture in the form of community life is well presented in a few isolated instances but needs much greater investment in terms of capacity building and support. A comprehensive development plan to exploit this untapped potential is needed.

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Limited skills in tourism product innovation and creativity

The potential for tourism offered by Uganda's natural and cultural resources is exceptional however design skills informed by local colours, materials and traditions are far too rare. There is limited product innovation and creativity among the tourism products instead; low-grade imported materials are commonly used. Better presented local markets are needed, which will generate benefits including jobs for local communities, greater awareness and promotion of cultural values, and increased tourist appeal. There is therefore a need to develop the skills for product innovation and creativity.

Competing economic interests – lose products to other economic development

The notion that development is associated with destruction has not spared the tourism industry. The need for the country's interest for energy to spur development has led to the loss of some tourist attractions in Uganda. Bujagali tourist site that was known for river rafting and kayaking was lost to the construction of hydro power dam.

The exploration of oil and its related activities in the Murchison Falls National Park have also impacted on the tourism resources with animals migrating to other areas of the park with limited human activities. Much as energy in form of oil, gas and hydro is needed to transform the country out of the peasantry economy there is a need for a win-win situation for such competing economic interests.



2.7 Human Resource Development

2.7.1 Introduction

Tourism is a people-intensive industry, people providing products and services to other people. Destination competitiveness cannot be achieved solely through attractive scenery, exotic wildlife and investment in tourism infrastructure. Human resource development in tourism is a fundamental part of the enabling environment and 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.

Tourism creates opportunities for poverty reduction through allowing communities, often disadvantaged communities, to benefit economically and socially from their cultural and natural assets through the provision of food and crafts, sharing their cultural heritage with visitors, and through offering accommodation. A large proportion of tourism jobs are accessible to those who are poverty-affected as some skills can be learnt relatively easy and with a minor investment. Jobs are also available part time and seasonally and this offers opportunities for people to supplement their income from other economic activities. Tourism is widely used as an effective policy tool for employment creation and poverty reduction, contributing to socio economic development.

2.7.2 Tourism Human Resources in Uganda

The status of human resources in the Ugandan tourism sector has been reviewed in three studies including Economic and Statistical Analysis of Tourism in Uganda, World Bank 2013; Uganda Tourism Sector Situational Assessment, Competitive Enterprise Development Project (CEDP) 2013; Tourism Reawakening, 2012 and Uganda Inclusive Tourism, ITC 2011.

The studies provided a diagnostic assessment of status, identified challenges and opportunities and were used as baseline studies in the Master Plan design process. Furthermore, the status of tourism human resources reviewed from related studies, notably Reviewing Uganda's Tourism Sector for Economic and Social Upgrading EPRC (2012); Uganda Ecotourism Assessment UNCTAD (2006); Uganda Domestic Tourism Study UNDP (2013); Assessment of the Tourism Human Resource Capacity in Uganda, UNDP (2013). Also referred to were; Ministry of Tourism, Wildlife and Antiquities Annual Performance Report FY 2011/2012; Skilling Uganda Ministry of Education and Sport (2011) BTVET Strategic Plan 2011-2020; and UTB Strategic Plan 2013-2016.

All the studies note that, a commitment to tourism sector development has to incorporate a commitment to human resources development in Uganda. Achieving a strong human resources base for the sector requires concerted efforts and investments in education, training and continuous professional development. Given the significant potential of tourism for poverty reduction and social inclusion, there is also a need to develop effective mechanisms and tools to maximise the benefits from tourism development to disadvantaged communities through increased employment and business opportunities.

A commitment to tourism sector development has to incorporate a commitment to human resources development in Uganda. Achieving a strong human resources base for the sector requires concerted efforts and investments in education, training and continuous professional development.

As a sector tourism in Uganda offers jobs at skilled, semi-skilled and unskilled levels for people with a wide variety of skills and experience. The job opportunities in tourism range from employment in the accommodation sector, restaurants, tour operating companies, travel agencies, and car hire companies, at natural and cultural attractions, in crafts and performance, in the events and meetings industry, in tourist transport and in tour guiding, as well as in public sector organisations.

However, the disadvantaged communities, especially in rural areas often lack the basic skills, work ethic and grooming standards that would make them suitable for immediate tourism sector employment. Community based enterprises tend to lack skills in business management, craft design, marketing and food hygiene. Targeted capacity building is vital in order to empower the community to reap the economic and social benefits from tourism development.

Tourism also offers opportunities through its economic linkages. These are particularly strong in the local farming and fishing industries, crafts and the construction industry. The strengthening of these linkages must be a key objective in tourism development as these are key in maximizing the economic benefits to the local communities.

Food and crafts are particularly useful tools for poverty reduction and social inclusion in Uganda. Their positive impact can be increased through:

- encouraging hotels and restaurants to source their food items (fruit, vegetables, fish) locally;
- Facilitating visits to local communities through village walks and visits to farms and plantations (tea, coffee, banana, vanilla etc.);
- helping communities to transform traditional crafts into an income generating activity through improved access to distribution channels, training in design and marketing;
- Encouraging the use of locally produced materials for construction and furnishing.

Structure of Tourism Labour Market

In the absence of a Tourism Satellite Account (TSA), data on tourism employment in Uganda is limited and estimates vary according to definitions and methodology. The TSA provides a framework for the measurement of tourism sector employment by analysing employment in the following sub-sectors: accommodation for visitors, food and beverage serving industry, tourist transport, transport equipment rental, travel agencies and other reservation services, cultural industry, sports and recreational industry, retail trade of country-specific tourism and other country-specific tourism industries.

WTTC reports that direct employment¹ in tourism in Uganda has increased from 150,700 in 2008 to 199,300 in 2012 was (Table 2.12) corresponding to 3.1% of total employment in Uganda in 2012. When including also the direct and induced employment contribution, the total tourism sector employment is estimated at 2483,700, representing a 7.6% share from total employment. It should be noted that the WTTC figures include domestic non tourist travel and are consistent with Table 7 of the TSA: RMF 2008.

1. Direct contribution to employment – the number of direct jobs within the Travel & Tourism industry. This is consistent with total employment calculated in table 7 of the TSA: RMF 2008.

2. Total contribution to employment – the number of jobs generated directly in the Travel & Tourism industry plus the indirect and induced contributions

Table 2. 12 Tourism Employment in Uganda (2008-2012)

Uganda	2008	2009	2010	2011	2012
Travel & Tourism Direct Contribution to Employment					
Real growth (%)	6.1	14.7	9.8	6.4	-1.3
% share	2.7	3	3.2	3.3	3.1
'000	150.7	172.9	189.8	202.1	199.3

Source: World Travel and Tourism Council 2012

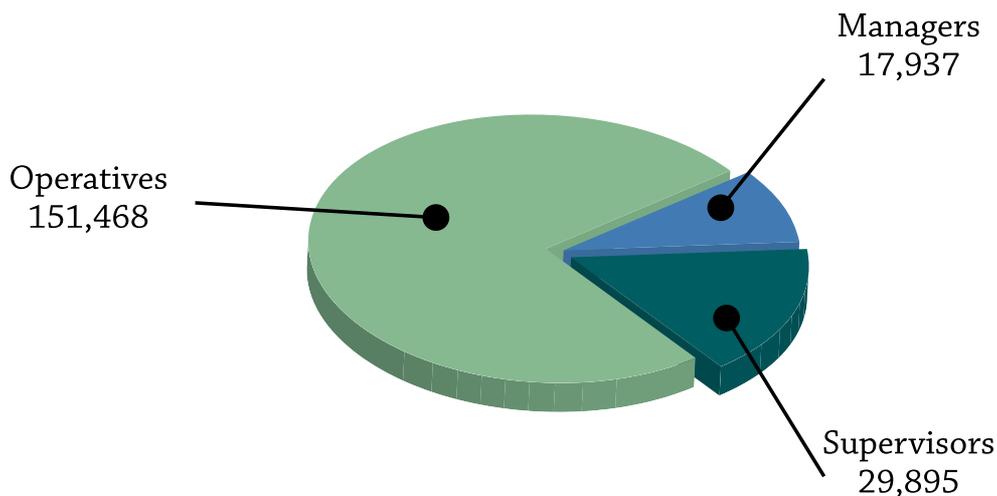
As Table 3.2 shows, in the five year period of 2008-2012 tourism sector employment grew by 32 per cent. The annual employment growth rate showed considerable variations, from an increase of 14.7 per cent in 2009 to a decline of -1.3 per cent in 2012.

UBOS uses the International Standard Industrial Classification of All Economic Activities (ISIC). This classification goes beyond tourism businesses as it includes not only hotels and camp sites but also all restaurants and mobile food services, events and other food services, many of which do not serve tourists or only a very small proportion of their business comes from tourism. On the other hand, this classification excludes other important tourism sector businesses such as travel agencies and tour operators, attractions, tour guides and tourist transportation. In its 2010/11 Census of Business Establishments (COBE), UBOS reports that in 2011 the accommodation and food sector employed 154,167 people, accounting for 14% of total employees registered by COBE 2010/11.

The tourism sector in Uganda is dominated by SMEs and family-owned businesses. According to AUTO, there are 113 registered tour operators and 82 registered travel agencies (2013). Based on industry intelligence and using an average estimate of five employees per company, the travel agency and tour operator sector employs 975 people. In addition, there are 325 registered tour guides according to USAGA, although their number is considerably higher than this as there are large numbers of unofficial tour guides operating in the country. There are a further 2,901 people working within the UCOTA-affiliated Community-Based Tourism Enterprises (CBTEs). Furthermore, there is also tourism related employment in the wildlife sector, tourist transportation, car hire, retail, in the cultural sector, sports and recreation industry - further contributing to tourism sector employment.

For an accurate estimation of the size of the tourism labour market, there is a clear need for the development of the Tourism Satellite Account. In its absence, the size of the tourism labour market can be estimated at 199,300 in 2012(WTTC 2012) - a figure that was used as a baseline figure for this plan.

According to international norms and current labour market trends in Uganda, the majority (75%) of jobs in tourism are at operational level, 16% at supervisory and 9% at managerial level, corresponding to 15,994 managers, 29,895 supervisors and 151,468 operatives (Figure 2.15).



Source: UNWTO Team Estimates

Figure: 2.15 Number of Employees by Skill Level

The gender distribution within the tourism labour market in Uganda is in line with international trends. According to COBE, hotels and campsites employ a total of 29,635 workers. Tourism sector has a balanced gender distribution with males represent 49.6% of the workforce. The restaurant and mobile food sector employs 79,572 workers and is characterised by a gender disparity with a disproportionate 78% female representation. According to the same source, the events and other food service sector employs a total of 44,960 workers, 67% of whom are females. Of the 2,901 workers within one of the UCOTA-affiliated community based tourism enterprises (CBTEs), 63% are women.

2.7.3 Tourism Human Resources Development Structure

Tourism human resource development activities in Uganda are carried out by a wide range of stakeholders, including several Government agencies, the education and training sector, professional association and employers. Each of these makes an important contribution to the overall development of tourism human resources.

The activities, however, are often fragmented, ad-hoc and uncoordinated. The key stakeholders are:

- Ministry of Tourism, Wildlife and Antiquities
- Ministry of Education and Sports
- Ministry of Gender, Labour and Social Development
- National Council of Higher Education
- Uganda Tourism Board
- Education and Training Institutions
- Tourism Industry Employers

Given the multiplicity of stakeholders and the diversity of the tourism sector, there is a need for strengthened stakeholder cooperation and the establishment of a robust coordination mechanism to further develop monitoring, planning and public-private partnership in the field of tourism human resources development across the entire tourism sector. In accordance with this, there is a need for the creation of an

institutional mechanism that will serve as a platform for stakeholder communication and collaboration both within the Government and between the public and private sectors. Such a platform would bring together the sector players to discuss about pertinent affecting the industry such as the poor working conditions of the employees.

Working Conditions in the Tourism Sector

Field interviews with employers, employees and the Uganda Hotels, Food, Tourism & Allied Workers' Union revealed that the sector is dominated by small family owned businesses, resulting in a high level of informality in the sector. There is a widespread practice of employing unskilled family members at low pay. There is also a widespread practice of using informal employment contracts, whereby unskilled employees are employed at low salary, without formal employment contracts and with limited or no career progression prospects.

By legislation, working hours in the tourism sector are set at 8 hours per day (plus 1 hour mealtime) and overtime is paid either in cash or in lieu. The overtime rate is 1.5 times the hourly rate and employees receive double pay on public holidays and on their day off. Businesses tend to prefer to pay this in lieu. There is no official minimum salary and Social Security contribution is usually not deducted from the salary of most employees. Most establishments do not have a health insurance/coverage system.

According to the Uganda Hotels, Food, Tourism and Allied Workers' Union, only 25% of all tourism sector workers are unionised and these are mainly working in National Parks and major hotels. This implies that the majority working in SMEs do have a collective bargaining voice. In general according to industry sources, there is inadequate awareness of labour laws among business owners, employers and employees and implementation of labour laws is poor as a result of financial constraints and limited institutional monitoring.

According to UBOS (2011) employees in the manufacturing and hotel sector receive an average monthly salary of about UGX 500,000, which is relatively low compared to employees in the paper, publishing and printing industry that had the highest average income of UGX 1,554,000. However, results of the UNDP-commissioned Uganda Domestic Tourism Study (2013) reveals that the median income in the tourism sector is in the range of UGX 200,000 per month with additional benefits estimated at UGX 60,000 per month. These benefits include accommodation, food and transportation.

The UNDP Uganda Domestic Tourism Study shows that a tourism sector salary is shared on average by four people. Tourism sector employees send home an approximate UGX100, 000 per month. This practice is reported by 78% of the surveyed employees. The survey also showed that most employees (69%) are single and young, with an average age of 26 years. Of all tourism sector employees surveyed, 44 % have attained at least college education and are largely trained either in hospitality (35%) or business management (39%). About half (52%) found their job formally through a formal application process, although 25% report having found their post through friends.

2.7.4 Public and Private Sector Human Resource Capacities

Both the Public and private sector stakeholders concur that weak human resources capacity is one of the most serious constraints to the development of the tourism sector in Uganda. Although there are no major quantitative shortages of labour supply in the Ugandan tourism sector, there are serious qualitative skill gaps.

Given the multiplicity of stakeholders and the diversity of the tourism sector, there is a need for strengthened stakeholder cooperation and the establishment of a robust coordination mechanism to further develop monitoring, planning and public-private partnership in the field of tourism human resources development across the entire tourism sector

Skill levels are generally low, resulting in poor, slow and unprofessional service delivery. This is detrimental to service quality, productivity and competitiveness. The apparent skill gaps necessitate the recruitment of foreign labour, particularly for supervisory and managerial jobs and at higher end establishments. On the other hand, Ugandan employees with experience tend to seek employment abroad in search of higher salaries and this further contributes to the skill deficiency.

Public Sector Capacity-building Needs

Based on the field interviews and observations, a number of skill gaps were identified at various public sector levels including at MoTWA, UTB (Figure 2.16), UWA, Uganda Tourism Police and the border officials. It is important to note that most public sector institutions large numbers of positions are unfilled, which poses a serious concern relating to the fulfilment of institutional mandates.

There is limited tourism sector knowledge, tourism planning and management skills at the sub-national (district) level. Tourism sector issues are usually covered by commercial or environmental officers who have limited knowledge of the tourism sector and hence have limited ability to lead tourism development and management initiatives at local levels.

MoTWA	UTB
<ul style="list-style-type: none"> • tourism marketing (operational level) • understanding target markets and market behaviour • fairs and exhibitions • advertising • fam trip organisation • fundraising • market research • quality assurance • product development 	<ul style="list-style-type: none"> • tourism marketing (operational level) • understanding target markets and market behaviour • fairs and exhibitions • advertising • fam trip organisation • fundraising • market research • quality assurance • product development

Figure: 2. 16 Public Sector Capacity Building Needs

Private sector capacity building needs

The skills gaps listed in Figure 2.17 were identified for the hospitality sector, tour operators, travel agencies and tour guides, the cultural sector, and Community Based Tourism Enterprises (CBTEs).Capacity building in the form of full-time education and training programmes, certified professional development courses, strengthened in-house on-the-job training and new programmes at vocational technical training level are vital for the closing of these skill gaps. Part two of this document will make detailed recommendations in this regard.

Hospitality Sector	Tour Operation, Travel Agencies and Tour Guiding
<ul style="list-style-type: none"> • international standard food preparation • food hygiene • practical hospitality training skills • computer skills and computer reservation systems • customer service, customer relations, service recovery • supervisory skills • managerial skills • sales and marketing • contract negotiation • yield management • cost control and pricing • quality assurance • human resource management 	<ul style="list-style-type: none"> • tour guiding • computer skills and computer reservation systems • product knowledge • customer service, customer relations, service recovery • sales and marketing • contract negotiation • yield management • packaging • itinerary planning • pricing • quality assurance • human resource management
Cultural Sector and Wildlife	C-BTEs
<ul style="list-style-type: none"> • conservation • interpretation • customer service, customer relations, service recovery • sales and marketing • contract negotiation • yield management • pricing • quality assurance • human resource management 	<ul style="list-style-type: none"> • craft design and marketing • business management • food hygiene • sales and marketing • contract negotiation • yield management • cost control and pricing

Figure: 2. 17 Private Sector Capacity Building Needs

2.7.5 Education and Training Provision

According to the Tourism Human Resource Capacity Report (UNDP, 2013), Uganda had 32 institutions conducting tourism and hospitality education and training. Of these 9 are public institutions and 23 are run by the private sector. 7 are categorized as universities, 10 as business schools, 11 as vocational institutes and 4 as tourism and hospitality schools (Appendix 2). The qualifications offered range from Certificate to Post graduate levels in areas of hospitality management, tourism management, tour and travel, food and beverage service. There are few universities that offer tourism related PhD level qualifications.

The two main tourism, hospitality and wildlife training public institutions are the Hotel and Tourism Training Institute (HTTI) and the Uganda Wildlife Training Institute (UWTI) which are under the MoTWA. HTTI located in Jinja, 80 km East of Kampala, is situated on a landscaped 1.565 hectare land and incorporates a training hotel. It is a Government-owned training institution and is seen as the flagship training institution in Uganda, although is visibly run down and lacking in basic modern amenities.

There is a clear need for a comprehensive review of tourism and hospitality curricula offered by both public and private institutions under the leadership of the National Council of Higher Education in cooperation with MoTWA, the Ministry of Education and Sports (BTJET Department), and the Uganda Tourist Board HRD Advisory Committee. Where possible the curriculum should be harmonised across the EAC and IGAD to allow opportunities for job employment.

If properly funded and managed, HTTI can and should be the Centre of Excellence for Uganda, driving skills development for the tourism sector.

HTTI currently offers short courses, Certificate and Diploma programmes and does not offer a Bachelor Degree. The programmes are offered in the fields of hotel and tourism management, pastry and bakery, and tour guiding. In the period of 1996 to 2012 HTTI has graduated over 1,500 students with Diplomas and Certificates in Tourism and Hotel Management. Student enrolment in the academic year of 2010/2011 stood at 457 students. Hotel and Tourism Training Institute (HTTI) Bill (already approved by cabinet to go to Parliament), intends to establish HTTI as a stand-alone statutory body.

The Uganda Wildlife Training Institute (UWTI), located in Katwe enclave within Queen Elizabeth National Park, 56 km from Kasese Town, primarily trains wardens, wildlife officer's, rangers and tour guides. UWTI offers a two year Diploma Course in Wildlife and Allied Natural Resource Management and a two Year Diploma Course in Wildlife Tourism and their respective certificate programmes. Student enrolment in the academic year of 2010/2011 stood at 140 students. The National Council for Higher Education (NCHE) has accredited the Wildlife Tourism course and the Joint Admission Board (JAB) provides students with an opportunity to pursue a Diploma in Wildlife Tourism and Management on government sponsorship.

On overall the numbers of tourism and hospitality training institutions have been increasing over the years providing a wide range of courses. However, the institutions (both public and private) are faced with challenges of limited training equipment and infrastructure, inadequate human resource capacity, unharmonised curricula and limited application of modern technologies in learning and training.

2.7.6 Key Tourism Human Resource Development Issues

Understaffing

Of the 301 approved posts in MoTWA, up to 143 are vacant. In the Policy, Research and Planning Unit the three senior posts are vacant as are six of the nine approved posts. Considering that this Unit is responsible for one of the primary functions of the Ministry, the vacancies result worrisome. In the Tourism Training Institute 41 of 65 approved posts are vacant. The lack of adequate staff applies to other government agencies like UTB, MAK, MUBS among others. This therefore calls for an urgent need to up-skill the officials in the various tourism departments, agencies and institutions.

The underfunded public training institutions and the small private sector training institutions tend to operate with insufficient staff capacity. Notable is the large numbers of unfilled positions at HTTI and UWTI. There is a lack of suitably trained and motivated training staff to deliver international standard teaching and learning

Inadequate curriculum review

The existing curricular in both the public and private institutions is not regularly reviewed to meet the sector needs. Most of the curricular is skewed towards general theoretical tourism and hospitality education and training. Though institutions have freedom to develop their own curriculum, there is a lack of provision in emerging areas of specialisation. The curriculum tends to put emphasis on theory and this is

exacerbated by the lack of practical training facilities. Curriculum modernisation is hampered by training institutions' shortcomings and inexperience, lack of exposure to international best practice and by the limited access to international textbooks and other teaching and learning materials. There is a clear need for a comprehensive review of tourism and hospitality curricula offered by both public and private institutions under the leadership of the National Council of Higher Education in cooperation with MoTWA, the Ministry of Education and Sports (BTVET Department), and the Uganda Tourist Board HRD Advisory Committee. Where possible the curriculum should be harmonised across the EAC and IGAD to allow opportunities for job employment.

Limited Practical Training Facilities

The majority of the hospitality and tourism training universities and institutes lack practical training facilities in both public and private institutions. Of particular concern is the fact that Uganda lacks international standard training kitchens where international standard food preparation skills could be imparted.

Most institutions operate in basic physical facilities with insufficiently equipped study rooms and without suitable practical training facilities, without modern teaching and learning materials, libraries or access to textbooks, computer facilities and training software. Both public and private institutions are reporting that tourism and hospitality training is underfunded and this has a detrimental effect on the practical element of training. The funding shortfall obliges training institutions to lower the standard of training in order to save costs.

Inadequate Internship Programmes and Work Destinations

In order to solve the gap of hands on experience, most institutions organise internship educational programs during recess with organisations in the tourism sector. These however, tend to be short, fragmented, unstructured and unpaid. With the increasing number of training institutions and students the provision of internship opportunities is insufficient, compromised and in some instances the programme is not implemented due to budgetary constraints.

All institutions are concerned with student employability, but only a few institutions provide data on the job destinations of their graduates. Institutions need to implement more robust systems for the monitoring of graduate employment destinations. Graduate employment monitoring after 6 and 12 months of graduation should be adopted as a norm.

Limited Quality Assurance

The National Council for Higher Education (NCHE) registers and accredits public and private institutions of Higher Education and their programmes. NCHE conducts this in consultation with Professional Associations and Regulatory Bodies. NCHE also acts as the body to monitor, evaluate and regulate institutions of Higher Learning and ensures minimum standards for courses of study. It also sets and co-ordinates national standards for student admission and determines the equivalence of all types of academic and professional qualifications of degrees, diplomas and certificates elsewhere. NCHE also certifies the physical structures of institutions and checks the staffing levels.

The accreditation process includes inspections and visitations. For an institution to be accredited by NCHE, it must have adequate physical and financial resources, viable programmes, suitably qualified staff and structures of governance to deliver quality

The ministry and its agencies need to collaborate with research universities to enhance applied research undertaking that is pro-sector development.

higher education. The limiting factor in the current system is the fact that accreditation relies on voluntary institutional application. NCHE does not currently have the resources to enforce compulsory accreditation and institutions can operate without a valid NCHE accreditation.

Research

Research is fundamental aspect in ensuring the sustainable development of the tourism industry. It helps inform planning and policy formulation and it supports the design of appropriate strategies that enable a destination to become competitive. Research in the tourism and hospitality in Uganda is mainly conducted at university level, most notably by Makerere University and Makerere University Business School. There is also research carried out by UWTI in the area of wildlife management.

However due to limited funding, academic research is limited both in terms of quantity and scope. There is a need to expand the research activities of universities and to better align them with the needs of the Government and industry. The ministry and its agencies need to collaborate with research universities to enhance applied research undertaking that is pro-sector development. Furthermore, there is also a need to facilitate international cooperation in research with leading research units and universities within EAC and with other overseas institutions.

Limited Continuous Professional Development programmes

Due to the dominance of SMEs and family-owned businesses in the sector, the culture of training and continuous professional development is weak. Employers prefer to employ staff at minimum salaries and on informal contracts and not to invest in continuous professional development.

The professional associations are conducting training workshops for their members, but the current provision is insufficient to substantially raise the skill levels in the sector. Training institutions are offering short courses which could be used for staff up-skilling but the institutions are often lacking marketing capabilities to promote these facilities to the industry. Professional development courses in specialist, niche and emerging areas such as event management, eco-tourism, adventure tourism etc. are not currently available.

Unfavourable Image and Attitude

Employment in the tourism sector suffers from an unfavourable image in Ugandan society. This is closely linked with the prevalence of low salaries, informal employment contracts and long and unsociable working hours. Entering tourism education and training is often considered as the last resort option for prospective students and their parents.

Salaries in the tourism sector are perceived to be low and working hours to be longer than in other formal economic sectors in Uganda. There is a perception that opportunities for employment and career advancement of Ugandans in the tourism sector are limited and that well-paid managerial positions are given to foreigners instead of Ugandans.

Therefore there is a need to change the attitudes however it calls for concerted efforts of the trainers, employers and the government. Strengthening the partnership between industry and education and training institutions collaborations will also help in the attitude change.

Limited international exposure

In its Travel and Tourism Competitiveness Report (2013), the World Economic Forum (WEF) points to the significance of foreign ownership as a factor. Uganda is at 132nd position whereas South Africa has a ranking of 31 and the United Arab Emirates 33. Few international hotel chains are present in Uganda, with the exception of Sheraton, Serena Hotels and Protea Hotels (recently acquired by Marriott). This limits Ugandans' ability to gain international exposure and to acquire international standard hospitality skills.

On the other hand, given the skills shortages, managerial, supervisory and culinary positions are often filled by foreign employees (most commonly from Kenya and South Africa). Whilst in the short term this positively contributes to skills development, in the long term the practice incurs extra costs for employers and reinforces the perception that Ugandans are being deprived of career development opportunities and higher paid jobs.

2.8 Tourism Financing and Investment

2.8.1 Introduction

The sustained growth of the tourism sector is wholly dependent on the adequate level of funding for the various tourism strategies and programmes. It is therefore important for tourism planning to identify tourism financing sources and put in place measures to attract investment into the sector.

2.8.2 Tourism Sector Funding

The current funding arrangements for the tourism sector especially national tourism organizations are inadequate in relation to the responsibilities to be fulfilled. This has mainly been a result of the governments' narrow tax base and budgetary constraints. The level of funding needed to raise the profile of Uganda as a major tourist destination and allow it to compete for business in international markets is approximately over USD 10 million a year. By virtue of its geography, Uganda has to compete directly with other countries in the region who offer a very similar product and some are well-established in global tourism markets.

Apart from government revenue got from tourism - directly through taxes and charges (including entry visas, import taxes, company taxation, licences, etc.) and indirectly through VAT and other charges on goods and services, the Tourism Act 2008 identifies other sources of funding. One of such is the Tourism Development Levy (which is yet to be implemented) which should be accompanied by rationalisation of the other taxes levied on the tourism sector). Development partner support to the sector is still limited, there is a need to attract and coordinate this complimentary support to address some of the binding constraints that need to be unlocked for the sector to boom.

There a number of approaches and platforms for promoting greater sectoral co-ordination and investment attraction that the tourism sector should capitalise on, such as the Tourism Sector Working Group. This is a relatively new government approach to planning and resource prioritisation. It is especially relevant to tourism because of the multi-dimensional nature of the industry. In effect, all the sectors impacting on

tourism like transport, energy and ICT, all plan and prioritise resources and actions supporting tourism through this mechanism.

In the same respect, development partners have been mobilised to coordinate support to the sector in order to avoid duplication and enhance effectiveness. The Government of Uganda, with its development partners, have embarked on an ambitious programme to improve the enabling environment for the private sector and reduce the administrative and bureaucratic burden. Reforms that will serve to encourage more investment in tourism product development and innovation in the sector.

2.8.3 Investment in tourism industry

The multi-faceted nature of the tourism industry provides multiple investment opportunities at all levels for domestic and international investors. . These can be at entry/start-up level, or for expansion and diversification. At a micro/small and medium-size enterprise (SME level), it provides entry opportunities for relatively low levels of investment for under-represented groups such as women, youth and minorities in the rural sector and urban environment. This especially applies within the tourism supply chains.

As a result of fiscal reform programme pursued by the Government, the overall investment climate in Uganda is more positive. Uganda has been able to achieve macro-economic stability and has maintained stable economic growth, averaging close to 6% annual rate, since 2008.

The currency exchange rate has also been reasonably steady. Most economic sectors, tourism included, have been liberalised for investment and marketing, while the Government has divested itself of tourism assets (such as hotels) that it previously owned and operated.

There is a free inflow and outflow of capital and 100% foreign ownership of investment is allowed. Security of investment is guaranteed under the Constitution and Investment Code, 1991 and Uganda is a signatory to major international investment related protocols, including: the Multi-lateral Investment Guarantee Agency (MIGA), Overseas Private Investment Corporation (OPIC) and the Islamic Corporation for the Insurance of Investment and Export Credit (ICIEC).

The Uganda Migration Profile (International Organisation of Migration, 2013) noted that 56% of all investments in the country are made by foreign investors, the greatest proportion from Asia (214 projects launched, drawing in USD 750 million), followed by the European Union (EU) (102 projects launched, yielding USD 308 million), and EAC and COMESA (a combined 66 projects, USD 151 million).

While this represents foreign investment for all sectors, the report identified the wholesale and retail (distribution) sector, hospitality and food, and manufacturing as being especially significant in playing a crucial role in job creation, generating 33,373 jobs in total. According to the Bank of Uganda, investment in the hospitality industry alone (accommodation, food and beverage services) reached USD 141 million in 2011. In order to specifically attract investment in the tourism sector, a number of incentives are been established (Table 2.13)

Table: 2. 13 Incentives for Investment in the Tourism Sector in Uganda

Categories of incentives
• 100% repatriation of capital, capital gains, dividends and profits are allowed
• 100% foreign ownership of investment is permitted
• Free land can be provided within the protected areas (Concession is subject to franchise fees)
• Foreign investor security is guaranteed under the Constitution and the Investment Code 1991
• Uganda is a signatory to the Multilateral Investment Guarantee Agency (MIGA), the Overseas Private Investment Corporation (OPIC) of the US, and the Convention on the Recognition and Enforcement of Foreign Arbitral Award (CREFAA), the ICSID, the TRIMS, the GATS, and the TRIPS
• Special equipment for adventure tourism activities like water sports, hang-gliding, golf, indoor sports equipment, power boats, water rafts, canoes, and water skiing equipment is allowed to be imported at 5% customs duty
• First Arrival Privileges in the form of duty exemptions for personal effects and motor vehicles to all investors and expatriates arriving in Uganda
• Import duty and VAT (18%) exemption on importation of construction materials for hotels (VAT exemption for hotels and lodges outside of the Kampala district no longer will apply from July, 2013)
• Uganda offers a ten year corporation tax holiday (no longer to apply)*
• Stamp duty exemption and exemption of withholding tax on interest on external loans
• Import Duty exemption on specially designed 4X4 tourist vehicles imported through and/or by licensed tour operators (not really effective)
• Foreigner, local and overseas investors can open foreign exchange accounts
• Helicopter chartered flight services are allowed anywhere in Uganda
• Work visas are granted to foreign technical (not available in Uganda) and managerial personnel for the purpose of transferring skills and know-how. The work visas can be issued for a period up to 5 years. The representative of the Immigration Department in the Ministry of Internal Affairs is a member of the team that issues work visas

Source: Ugandan Investment Authority, 2012

*It is noted that the Government terminated tax breaks for individuals from July, 2013 as a measure to reduce the country's deficit.

In general, in order to raise the competitiveness of the tourism sector in Uganda, domestic and foreign investments have to be channelled into upgrading of the tourism product and the quality of service. Principal stakeholders have to closely collaborate in devising and aggressively promoting an attractive package of investment incentives.

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2.8.4 Key issues in tourism financing and investment

Although the government has put in place, an enabling investment environment and instituted a number of incentives, there is still limited investment in tourism sector. Strategies need to be more pro-active and targeted to the financing and investment needs in the sector.

Investment in tourism by the private sector has been inhibited by lengthy bureaucratic procedures that affect business operations and competitiveness. For instance the existing regime requires hotels to obtain eleven or more licences for different aspects of hotel operations. Therefore there is need for de-regulation and simplification of procedures in order to increase compliance and attract investment in the sector.

There is need to bridge the funding gap relating to tourism product development, marketing, training and education. The Tourism Development Levy needs to be implemented. More so Public-Private Partnerships (PPPs) should be explored to attract and secure funding for large-scale tourism projects.

In order to raise the competitiveness of the tourism sector in Uganda, domestic and foreign investments have to be channelled into upgrading of the tourism product and the quality of service. Principal stakeholders have to closely collaborate in devising and aggressively promoting an attractive package of investment incentives.



2.9 Tourist Safety and Security

2.9.1 Introduction

Security and safety is a key influence in determining the strength of a nation's economy. The success of a tourism destination depends on its ability to provide a safe and secure environment for visitors. A safe and secure environment will not only encourage visitors but also act as an incentive for tourism investment and competitiveness.

2.9.2 Tourist Security in Uganda

Tourism is a fragile sector is extremely sensitive to the impact of safety and security issues. The frequent acts of terrorism and lawlessness affecting some parts of the Eastern African region, have severe repercussions for the travel and leisure movements Uganda takes security seriously drawing from its past experiences of historical turmoil, loss of property and negative image perceptions from the Idi Amin era and Kony war.

To improve on the security of the tourists, a SWIFT force was deployed in the National Parks and a tourism police formed with a primary function to protect tourists and tourism installations, such as hotels and other tourist destinations across Uganda. These complement the Uganda Wildlife Rangers who already operate within the protected areas however they need a tourism-specific training to meet the sector needs.

2.9.3 Tourist Safety in Uganda

Tourist safety is not only centred on threats of human conflict but includes disease outbreaks, natural disasters, financial crises and road accidents. Their impact on a destination can be devastating in terms of the negative images it conveys to prospective visitors via the media, word of mouth or government policies.

Persistence of such incidences leads to cancellations of bookings, avoidance of booking trips to such destinations and even the already at a destination to safer areas. Such a scenario is not good for the sector that is taken as a pivotal pillar to the economy. In Uganda the safety of tourists ranging from facilities and services is not adequately addressed.

Road Safety

Tourist road accidents are a serious image issue on the health and safety record of a destination. The need to address the traffic congestion, improve the conditions of the roads and reduce road accidents is essential in protecting the image and giving assurance to visitors.

Visitor Safety Services

Tourist safety also need be observed by the service providers. Personal health issues need to be taken care of by careful precautions on the food and water which is consumed. This means that associations or organisations that interact with tourists should have a responsibility of ensuring their safety and well-being. Adherence to safety requirements requires constant monitoring and supervision. However this can be achieved if all the players in the sector abide by the health and safety regulations and guidelines.

The Private sector needs to build its capacity through continuous Professional Development to close the skills gaps for each particular sub sector. The skills required include training in business plan writing, small business management, budgeting, business financing and human resources management and development.

2.10 Private Sector Capacity Development

2.10.1 Introduction

The tourism industry in Uganda is public sector led and private sector driven. This implies that the private sector plays a significant role in the running of the tourism business in the country. The public sector (Government) has a crucial leadership role to play by promoting constructive partnership with the private sector and other key actors, to ensure that tourism delivers its potential as an engine of socio-economic development.

2.10.2 Private Sector Tourism Organisation

The private sector includes different tourism associations headed by an umbrella association called Uganda Tourism Association (UTA). The membership is whoever is dealing in tourism business but it is not compulsory. Association members include USAGA, UHOA, AUTO, UCOTA, COBATI, Hotel and Catering Association Uganda (HCAU), District Tourism Associations (DTAs), Uganda Association of Tourism Training Institutions (UATTI), Board of Airlines Representatives (BAR), Uganda Association of Air Operators (UAAO) and Uganda Association of Travel Agents (TUGATA). UTA's responsibility is to improve business environment through such actions as; policy research advocacy; design and coordination of private sector initiatives; promotion of trust and dialogue; facilitation of new technologies and development of skills and manpower. However, there are significant numbers tourism enterprises and service providers that are not members of their respective associations, which pose a challenge for the sector to implement self-regulation mechanisms.

2.10.3 Key issues in Private Sector Tourism Development

Despite the private sector being the driver to the tourism sector it is faced by a number of challenges which include limited support from the government, weak human resources capacity, inadequate coordination of all sector players, limited business managerial skills and limited coherence within individual associations.

The Private sector needs to build its capacity through continuous Professional Development to close the skills gaps for each particular sub sector (Figure 2.18) The skills required include training in business plan writing, small business management, budgeting, business financing and human resources management and development. A particular focus will be placed on enhancing the product development and marketing skills in tourism and hospitality enterprises to ensure that they are able to reach the desired target markets and provide them with appropriate products.

<p style="text-align: center;">Hospitality Sector</p>	<p style="text-align: center;">Tour Operation, Travel Agencies and Tour Guiding</p>
<ul style="list-style-type: none"> • international standard food preparation • food hygiene • practical hospitality training skills • computer skills and computer reservation systems • customer service, customer relations, service recovery • supervisory skills • managerial skills • sales and marketing • contract negotiation • yield management • cost control and pricing • quality assurance • human resource management 	<ul style="list-style-type: none"> • tour guiding • computer skills and computer reservation systems • product knowledge • customer service, customer relations, service recovery • sales and marketing • contract negotiation • yield management • packaging • itinerary planning • pricing • quality assurance • human resource management
<p style="text-align: center;">Cultural Sector and Wildlife</p>	<p style="text-align: center;">C-BTEs</p>
<ul style="list-style-type: none"> • conservation • interpretation • customer service, customer relations, service recovery • sales and marketing • contract negotiation • yield management • pricing • quality assurance • human resource management 	<ul style="list-style-type: none"> • craft design and marketing • business management • food hygiene • sales and marketing • contract negotiation • yield management • cost control and pricing

Figure: 2. 18 Private Sector Capacity Building Needs

Capacity building in the form of full-time education and training programmes, certified professional development courses, strengthened in-house on-the-job training and new programmes at vocational technical training level are vital for the closing of these skill gaps. In overall the private sector representative bodies are generally under-resourced and most of them lack strong executive support and coordinated efforts. They are not adequately articulating the industry's contributions and needs to the Government or the public. Since most of the investment in the tourism sector is carried out by the private sector, they face similar challenges as those highlighted in section 2.8 of tourism financing and investment.

2.11 Community Tourism Development

Community-based tourism initiatives and related activities have been established for many years in Uganda. There are a number of associations and individual initiatives that focus on supporting community tourism enterprises. The main associations are, the Uganda Community Tourism Association (UCOTA) and the Community Based Tourism Initiative (COBATI).

Uganda Community Tourism Association (UCOTA)

UCOTA is an umbrella association established in 1998, grouping 60 community initiatives, although not all of these are currently active. Its objective is 'to empower local communities in sustainable development through small-scale tourism and handicraft enterprises' to improve their lives. It provides support in planning, decision-making and implementation of tourism development activities and assists in two main areas: delivering tourism services and developing products such as handicrafts.

Tourism services include providing catering and accommodation services in form of bandas (huts), campsites, and homestays. Many local communities also offer direct tourism services such as; culture tours, visits to local heritage sites, guided walks, town or village tours, nature walks in the forest. Some also offer specialist services such as; bird watching, demonstration of handicraft making, rock climbing (in Eastern Uganda), story-telling, and learning about traditional medicine and traditional tools.

The community enterprises are mostly located around the Protected Areas and along tourist routes. Most ventures are initiated and managed by women (90% involved in handicraft production), providing them with an independent income. There are about 2,901 people working within the UCOTA affiliated Community-Based Tourism Enterprises (CBTEs). UCOTA developed the Pearls of Uganda initiative which represents the enterprises and initiatives that have met standard criteria by tour operators. UCOTA provides links between the community ventures and the larger enterprises and lists the firms that support communities on the Pearls of Uganda website. A regular newsletter - the Pearls of Uganda Post - is distributed to provide news of new ventures, activities and events.

Community-based Tourism Initiative (COBATI)

COBATI was established in 1998 with the aim of empowering rural Ugandan communities to participate in community tourism in order to generate income and improve their livelihoods. It achieves these goals by building the capacity of local people to access the tourism value chain, through mentoring, on the spot training, and outreach visits. COBATI offers a range of training programmes to support the local communities in community tourism, agro-tourism, cultural heritage, developing heritage trails, homestead tourism, support to local SMEs, and conservation of unique rural features and historic sites.

In the process, minority and under-represented groups including women and youth, especially in the rural sector, are empowered to become economic citizens. This contributes to promoting inclusivity by extending participation in the expanding Ugandan tourism sector to these communities. COBATI's work has been recognised internationally and has won a number of accolades such as National Geographic/Ashoka Geotourism Urban Adventure Prize in 2009; Commonwealth Business Council African Business Awards in 2008; and it came second in the World Bank sponsored innovative competition Development Market place 2000.

COBATI has a Homestay programme which offers opportunities for international volunteers to work with local people in a number of areas such as teaching, creating handicraft from recycled waste into crafts, and construction and building materials, thus providing a cross-cultural experience for both hosts and guests. This serves to revive and preserve traditional crafts and customs, whilst helping Ugandans reconnect with their cultural heritage. There is a network of over ten village homesteads located in Central and South Western Uganda. The association provides a marketing service to the homesteads through its website.

In general community associations face challenges of: inadequately trained human resource; limited marketing of community products and services regionally and internationally; limited community involvement in the tourism value chain; inadequate and unsustainable funding (most projects depend on donor funding)

Community based tourism initiatives

There are a number of conservation and livelihood projects in Uganda that are either directly involved in providing community tourism services or in supplying the tourism sector. These include (amongst others):

(i) Community Museums Programme

The Community Museums Programme is supported by the Cross-Cultural Foundation of Uganda (CCFU), which exists 'to promote the recognition of culture as vital for human development that responds to our [Uganda's] national identity and diversity'. This is a component of the Foundation's Cultural Heritage programme, which is mandated to:

- support local initiatives to promote – currently supporting 25 community museums throughout the country;
- foster heritage education linked to community museums to engage young people in protecting and promoting cultural heritage;
- promote policy advocacy for a conducive operating environment for heritage development and protection.

The individual museums each display unique ethnographic collections, literature, traditional instruments, all demonstrating their cultural rights of self-expression and identity. The Uganda Community Museums Association (UCOMA) is an NGO that was registered in 2011 with the support of CCFU. The aim of the organisation is to enable members to define a common vision and articulate their needs and aspirations. CCFU cooperates with UNESCO and the Uganda National Museum.

(ii) Uganda Wildlife Authority community revenue sharing scheme

Eligible communities around National Parks in Uganda receive 20% of the National Park entry fees for community projects. As visitor numbers to the National Parks vary greatly, the amount of funds communities receives also varies. Nevertheless, this engagement brings local communities into the processes of planning and sharing costs and revenues as an important part of the on-going human/wildlife conflict management process, of educating and heightening awareness. In 2010 guidelines were set on how communities could assess and utilise the funds.

Based on an index for population size, index for boundary (bordering the protected area) 20 % revenue sharing funds collected are put in separate (bank) accounts –so that UWA cannot access the money. The funds are spent on a number of community

priorities in line with UN’s MDG 1 and MDG 7. These priorities include:

- targeting household incomes (at household level);
- aiming at mitigating the costs of human/wildlife conflict; and
- focusing on training that produces tangible outcomes.

Table: 2. 14 Revenue from National Park Entrance Fees Shared with Communities

Revenue shared with communities	2007	2008	2009	2010	2011
	USD	USD	USD	USD	USD
	406,372	159,775	191,897	102,891	422,945
Approximate available revenue (20%) of NP entrance fees	2,258,188	2,334,623	2,584,448	3,113,213	3,413,799
Amount distributed	18.0%	6.8%	7.4%	3.3%	12.4%

Source: UWA and UNWTO project team

Table 14 shows that only 9.4% of available revenue was used for the years 2007-2011. In other words, this represents more than USD 12.4 million of unused money originally intended for communities adjacent to National Parks. These funds are still available upon the request of villagers to local districts. As long as the local communities receive sufficient capacity building to allow them to link with the tourism industry, the sector can play a vital role in supporting jobs and output across the local economy.

UWA also operates a pilot programme where the communities around Lake Mburo National Park benefit from fees paid by regulated sport hunters who pay large amounts to shoot excess, or problem wild animals on their land. Around 100 such licences are issued in and around Lake Mburo National Park annually. Although sport hunting does not directly benefit everyone, it is one of the initiatives through which UWA has managed to change people’s attitude and engage them in wildlife conservation outside protected areas.

Other initiatives include: USAID/UGANDA Tourism for Biodiversity programme implemented by the Africa Wildlife Foundation, which aims to support local communities to develop tourism businesses, improve their livelihoods, encourage them to appreciate and protect natural resources; The Natural Forestry Authority’s (NFA) Ecotourism for Sustainable Forest Management project that supports ecotourism sites in Uganda (Mabira, Mpanga, Kalinzu and Kaniyo-Pabidi) and involves local communities to provide services, such as guiding, primate tracking, bird watching, forest walks and, at some sites offer accommodation; and private sector tourism firms that support community development initiative such as ‘Wild Places’ which runs four high-end lodges and camps in Uganda. They have on-going projects at each of their lodges and involve communities in product development, lodge operations, tour guiding, and resource conservation.

2.11.1 Key issues in Community Tourism development

Whilst community-based tourism is well established in Uganda and can demonstrate several success stories, its growth and sustainability are hampered by a number of challenges, namely:

- In spite of governments policy commitments there is still limited financial support provided to the associations, thus requiring constant time and resource consuming fund raising activities to continue their work;
- Inadequately developed community tourism product offer and unsatisfactory visitor experience that does not attract a wide range of many tour operators to actively get involved in community tourism activities
- the communities generally lack financial and business management skills needed to effectively run such enterprises;
- limited community tourism initiatives in urban areas – hence low participation of communities living in urban areas;
- communities generally appear to be over reliant on ‘a champion’ in the community to initiate, manage and drive the business;
- Long period taken to realise benefits from community projects which leads to loss of members enthusiasm and results in high turnover of members
- Most community projects heavily rely on the support of NGOs such as UCOTA and COBATI, as well as international NGOs and local tourist lodges in different parts of the country, which take initiatives to assist local communities. Hence most of them are not self-reliant and sustainable in the long run.

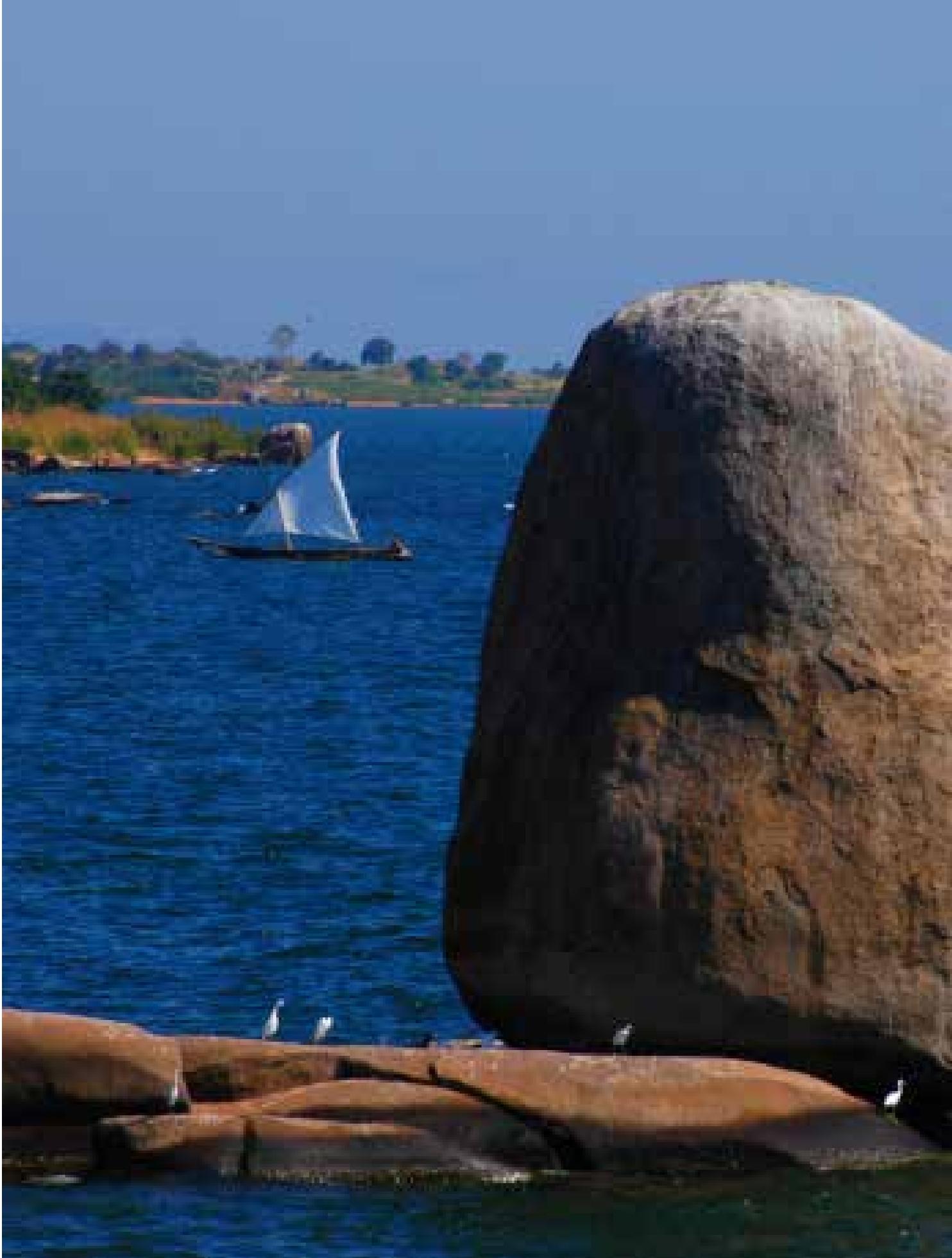
In general, properly planned and well-managed tourism can bring substantial benefits to a community and its residents. It is one of the few industries that channels new money into a community - that is, money from outside local boundaries. Tourist spending creates a chain-reaction, producing a supply-side stimulus, which flows through the local economy. As a direct result, this creates employment through enabling market access, thereby increasing household income levels and promoting inclusivity.

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Table: 2. 15 SWOT Analysis

<p>Key Strengths</p> <ul style="list-style-type: none"> • Rich, diverse and unique wildlife diversity (Unique savannah and tropical forest conservation areas – 10 National parks, 2 UNESCO natural world Heritage sites, Ramsar sites, Important Bird Areas, mountain Gorillas) • Rich, diverse and unique cultural heritage – cuisine, arts, architecture, craft, fashion, dance, faith based attractions (One UNESCO world heritage site,) • All year round pleasant tropical climate • Abundant water resources and attractions – Lakes, rivers (Source of the Nile) waterfalls, rapids • Scenic landscapes- mountains, rift valley, forest landscapes, beaches • Naturally hospitable people • Liberalised and macro-economically stable economy – with investment incentives • Enthusiastic nascent and self-motivated private sector • Elaborate institutional tourism development framework – autonomous Ministry of Tourism • Diverse range of tourism infrastructure and facilities – accommodation (budget, mid-range and high end), MICE facilities • Vibrant entertainment industry 	<p>Key Weakness</p> <ul style="list-style-type: none"> • Inadequate funded/ resourced tourism institutions • Lack of a strategic tourism investment plan • Infrastructure and facilities bottle necks – limited: road access; public transport; air transport infrastructure; quality accommodation facilities; signage, water, energy) • Weak resource human base (quantity and quality) – insufficient skills, inadequate tourism training capacity and quality infrastructure • Limited tourism marketing – underfunded & unsustainable marketing initiatives, weak brand image in key international markets, untapped domestic market, insufficient PR/ communication and emergence response • High costs of doing business – high cost of power, credit access & multiple licence/fees/tax • limited economic benefit of community & youth from tourism • Weak and fragmented private sector • Limited product range – narrow product diversity, over reliance on few products (gorilla tourism, big 5) limited event tourism, poor craft and souvenir • Limited research and development – lack of reliable up-to-date tourism statistics and data • Limited capacity in tourism planning and development at national and local government level • Limited tourism mainstreaming and integration across various government sector • Limited awareness of tourism potential as a growth driver • Limited IT adoption and usage in tourism business – limited ecommerce options • Inadequate protection of environmental and cultural resources • Unfavourable image of the tourism profession
<p>Key Opportunities</p> <ul style="list-style-type: none"> • High economic growth rate - regionally and on the African continent • Regional tourism integration – free movement of member country citizens, single visa, joint regional marketing, IGAD Tourism Master plan • Increasing and growing global market – increasing global travel (1 billion international travels per year) • Increasing foreign investment (FDI) in the tourism sector • Increasing regional and international airlines flying to Uganda • Increasing interest from development partners to support tourism sector development • New emerging domestic, regional, international markets • Presence of foreign embassies in key source markets • Niche market product development – astro-tourism, agro-tourism, butterfly watching, experiential tourism, thematic based products (explorer trail, Amin), Faith based tourism, volunteer tourism, education/training tourism, MICE • Available tourism online e-business/e-solutions options • Increased environmental awareness by international travellers – growth of responsible travel, ecotourism • Conservation areas with potential for elevation to international recognition status (such as UNESCO world Heritage sites) 	<p>Key Threats</p> <ul style="list-style-type: none"> • Unpredictable global economic situation • Increased competition from lower cost regional and international destinations • Oil and gas mineral exploration and production in ecologically sensitive conservation areas • Global Climate change – floods, droughts • Epidemics - Ebola, avian flu • Trans-boundary and international illegal trade in wildlife and wildlife products • Natural disasters – Earth quakes, landslides • Terrorist incidences and threats • Political instability/regional armed conflicts in neighbouring countries • Negative international media publicity /negative travel advisories



CHAPTER

3



3. The Development Strategy

Uganda is a country with a strong tourism potential, endowed an exceptional beauty and a wide variety of natural and cultural attractions. These form the resource base for the development and promotion of the tourism industry. Government has prioritized tourism as a core sector in the social economic transformation of the country, contributing to greater employment, social inclusiveness and sustainable resource use. This development strategy takes stock of the resource potential and is cognizant of the destinations SWOT in defining the path that will maximize the competitiveness of the sector and contribute to the attainment of the national objectives.

3.1 Strategic Vision

Uganda established as Africa's top sustainable tourism destination

3.2 Strategic Objectives

The objectives of the Tourism Master Plan are derived and aligned to the objectives defined in the Tourism Policy (2014)

1. To develop and diversify the tourism products and services
2. To develop tourism infrastructure and facilities
3. To promote and market the destination in national, regional and international markets
4. To develop human resource and institutional capacity for the tourism sector
5. To enhance regulation, coordination and management of the tourism sector
6. To promote community involvement and enterprise development in the tourism economy
7. Promote safety and security of tourists and tourism assets
8. Promote local, regional and global partnerships for tourism development
9. Promoting conservation of natural and cultural heritage resources

3.3 Guiding principles

The formulation of the Tourism Master Plan was guided by the following principles as stipulated in the Tourism Policy (2014):

- i. tourism will be private sector driven
- ii. government will provide the enabling framework for the industry to flourish
- iii. A strong destination brand and image and increased national awareness of tourism

- iv. effective market inclusiveness and community involvement will form the basis of tourism growth
- v. tourism development will be underpinned by sustainable environmental management practices
- vi. tourism development is dependent on and the establishment of cooperation and close partnerships among key stakeholders
- vii. tourism development will take place in the context of regional cooperation with other states
- viii. tourism development will support the economic, social and environmental goals and policies of the government

3.4 Strategic Programmes and Actions

This section puts forward the strategic interventions that need to be anchored on the key tourism issues identified in the situational analysis. The Interventions are designed based on the research and discussion with the key tourism stakeholders and on international best practices.

3.4.1 Tourism Planning Management and Regulation

3.4.1.1 Restructuring institutional and regulatory framework

As earlier highlighted in the situational analysis the current regulatory framework is characterised by overlapping mandates, limited implementation, enforcement, monitoring and evaluation of existing policies and laws.

This master plan proposes a number of strategic interventions which include the review and update of the Uganda Tourism Act (2008) to streamline mandates and responsibilities of various departments and agencies and to strengthen the registration and licensing of tourism enterprises and services. In the reviewed Act, the options of reorganising the current institutional arrangement of the tourism sector to enhance efficiency should be considered. During the master plan formulations process some public and private sector representatives expressed the need to have a stronger National Tourism Organisation (NTO) that would be titled the Uganda Tourist Authority (UTA) to give it a higher standing and enable it to enforce compliance to existing standards and guidelines in the sector.

This option requires more study and wider consultation among the tourism sector players. The review should also consider the option of strengthening the museum and monuments department by elevating it to an independent authority status.

Tourism is a multi sectoral industry whose development from a public sector input requires the actions of various ministries, departments and agencies. The situational analysis revealed unclear and often overlapping inter institutional roles leading to paralysis and inefficient resource allocation. In order to streamline mandates, the roles and responsibilities of each of the sector players, the review should clarify the roles and define the functional relationships of each stakeholder as well as the role of the ministry responsible for tourism to steward the holistic development of the industry.

3.4.1.2 Role of the Government in Tourism

The Government's role in tourism is to provide leadership for the industry, through the Ministry of Tourism, Wildlife and Antiquities (MoTWA), as a key economic driver of prosperity for the nation. It should, however, only intervene where the industry itself is unable to act effectively.

Specifically the Government's roles are to:

- Ensure inter-sectoral co-ordination on all issues relating to tourism;
- Formulate tourism policy, plan for tourism development, and regulate tourism activities through legislation, licensing and classification;
- Monitor and evaluate performance in terms of quality, safety and development targets;
- Facilitate tourism development by providing the infrastructure, economic, regulatory, fiscal and political environment that encourages investment and orderly growth; and
- Ensure adequate funding, proportionate to agreed growth targets, for the tourism sector, and for the marketing of Uganda as a world-class tourist destination in key and emerging source markets.

The Government fulfils its roles through the activities of its organs of ministries, authorities, agencies. The Government body with primary responsibility for the tourist sector is MoTWA.

3.4.1.3 Tourism Role and Functions of MoTWA

The fundamental role of MoTWA is to formulate tourism policy and monitor its implementation. The Ministry focuses on the policy development and oversight, planning and regulation of the sector while the implementation and management of programmes is the role of the agencies. The Ministry should be adequately resourced with the technical and financial capacity to undertake the following functions;

- Formulate and guide elaborate tourism policy and plans at the national and local government and at the regional and sub sectoral levels
- To mobilise and secure investment and funding for tourism development programmes
- Ensure the allocation of infrastructural and other resources that will have a positive impact on tourism
- To lead and guide the coordination and development of the stakeholders plans and actions for tourism development.
- To mobilise and Co-ordinate other Government Ministries' departments and Agencies' in prioritising and implementing actions that support tourism development
- To promote and Co-ordinate partnerships of bilateral and multilateral relations in tourism development with regional and international governments, organisations, and development partners
- To initiate and manage a robust tourism management information system that collects, analyses and disseminates general and cross cutting tourism information that guides policy development, monitoring and planning functions
- To set performance standards, monitor and evaluate implementation programmes of the tourism agencies, local governments and other MDAs on tourism development
- To promote and coordinate implementation programmes for the Tourism Development Master Plan

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As one of the main vehicle for the implementation of the national tourism policy, the role of the UTB is to support and promote the development of tourism to and within Uganda.

3.4.1.4 Role and Functions of UTB

As one of the main vehicle for the implementation of the national tourism policy, the role of the UTB is to support and promote the development of tourism to and within Uganda. The Tourism Board will be strengthened to lead the sector to a higher competitive order to attract higher visitor numbers and incomes from the tourism resources.

The Board will focus and undertake the following actions to achieve this outcome;

- Aggressively Market Uganda as the tourist destination of choice in the domestic and international market
- Promote and enforce a high quality of standards for the tourism enterprises and services and regularly monitor quality and safety standards in the sector
- Support the development of the range and quality of tourism products and enterprises capable of appealing and competing for the domestic and global tourist market
- To promote and build the capacity of tourism enterprises and tourism human resource along the value chain
- To lead the research and development of credible information and systems to inform the sector of the latest market trends to guide enterprise growth and competitiveness
- To promote public awareness and a national culture of tourism and to build a positive image to attract visitors to the destination's tourist areas
- To promote and attract investment and inclusive participation in the tourism sector.

3.4.1.5 Role and Functions of the Local Authorities

The situation analysis highlighted the over centralised function of public sector in tourism planning and management and the limited role and capacity of the local governments in this regard. This gap is amplified by the fact that most of the tourism resources and investment areas are managed by the local governments.

In order to sustainably conserve and develop the tourism resources and enterprises, the local governments have to be integrated and effectively involved in the planning and development of tourism in their localities. In recognition of the Trans boundary nature of tourism resources and facilitations, the plan proposes the Tourism Development Area (TDA) and Tourism Cluster approach to coordinate the development and promotion of tourism at the regional levels within the decentralised structures.

The plan specifies the following roles and actions of the local governments to achieve the tourism development objectives;

- To support the development of regional tourism development areas and clusters to harness and promote the tourism resources and enterprises in the region
- To develop, integrate and commit resources for tourism development plans in the district development plans
- To coordinate with the Tourism Board in the awareness and enforcement of quality standards for the tourism enterprises and services and regularly inspect their compliance with quality and safety standards in the sector
- To initiate, support and facilitate the development of the quality and range of tourism products and enterprises that appeal and compete for the domestic and global tourist market

- To initiate and support capacity building programmes for tourism enterprises and human resource and promote the inclusiveness of local communities, youth and women employment in enterprises within their locality.
- To zone, conserve and promote investment in the local tourism attraction areas and resources by facilitating infrastructure and incentives that attracts domestic and foreign investment.
- To mobilise and actively promote local enterprises, attractions and events in the local areas increase visitation and utility of the attractions and create opportunities for local enterprise
- To coordinate and support local communities, cultural and faith based organisations to identify, conserve and develop their attractions and protect them from the threats of natural and cultural degradation, conflict and alternative economic use.

3.4.1.6 Role and Functions of Private Sector Associations and Enterprises

The tourism sector is a composite of several sub sectors along its value chain. These include airlines, the travel agents, tour operators, tour guides, hotel and restaurant service providers, event organisers; souvenirs, tourism entertainers and others. As the enterprises in these sub sectors grow in numbers and economic importance, they tend to form associations to advocate, self-regulate and promote their trade.

In Uganda, all these sub sector organisations subscribe to an umbrella organisation the Uganda Tourism Association that performs the higher order advocacy, self-regulation and promotion of the entire tourism sector and is the recognised industry voice interfacing with the government on behalf of the tourism private sector.

In order to galvanise the role and objectives of the private sector associations, the tourism master plan focuses on empowering and building the capacity of these organs to create governance structures that effectively mobilise members, lobby and amplify the private sector voice on matters affecting the development of the sector.

The plan will focus on the promotion and support of the private sector associations to conduct and achieve the following functions and objectives;

Sub-sector organisations;

- Mobilise and recruit membership of the individual enterprises in the sub sector
- Identify, formulate and articulate the needs and contributions of their members in the sub sectors;
- Support and develop members through knowledge sharing, mentorship and protection of the industry best practices and standards
- To identify, resolve or develop common positions on sub sectoral issues and forward through the umbrella organ for engagement and support from government
- Raise and monitor basic standards of service among members through rigorously enforced self-regulation

Uganda Tourism Association;

- Communicate and engage with the Government, government organisations, civil society and other commercial sectors on behalf of the private sector;
- Contribute to the development and marketing of the destination and the private sector enterprise by mobilising members towards national and common objectives
- Contribute to national policies, plans and programmes through engagement with the responsible ministry and agencies
- To provide the industry voice on matters affecting the private sector and harmonise the sub sectoral objectives to position a united sector
- To support research and information sharing among stakeholders and government that guides the development of the industry.
- To resolve and arbitrate industry disputes and protect the image and sector from infiltration of fraudsters and other industry crime.

Apart from the sub-sector associations, individual commercial enterprises also have roles and functions to perform. The functions of the private/commercial sector enterprises in tourism can be defined as follows:

- To provide goods, facilities and services to meet the expectations and desires of the tourist in terms of quality, quantity, safety and in conformity with national policy, laws and regulations and international requirements;
- To ensure that potential tourists are aware of the products, services and facilities on offer, and to promote them in the market place;
- To support the UTB in marketing Uganda as the favourite tourist destination;
- To align and support the a national brand strategy through the individual marketing programmes;
- To ensure that their employees are properly trained, compensated and provided with working conditions that are in conformity with best practices; and
- To ensure the protection of the environment and eco-system in all their activities.

3.4.1.7 Tourism coordination

With various tourism sector players there is need for a coordination mechanism where the implementing agencies within the MoTWA are coordinating with other ministries and the private sector. The coordination should take into account the range of areas (Figure 3.1) that relate directly or indirectly to the tourism sector and require sectoral coordination.

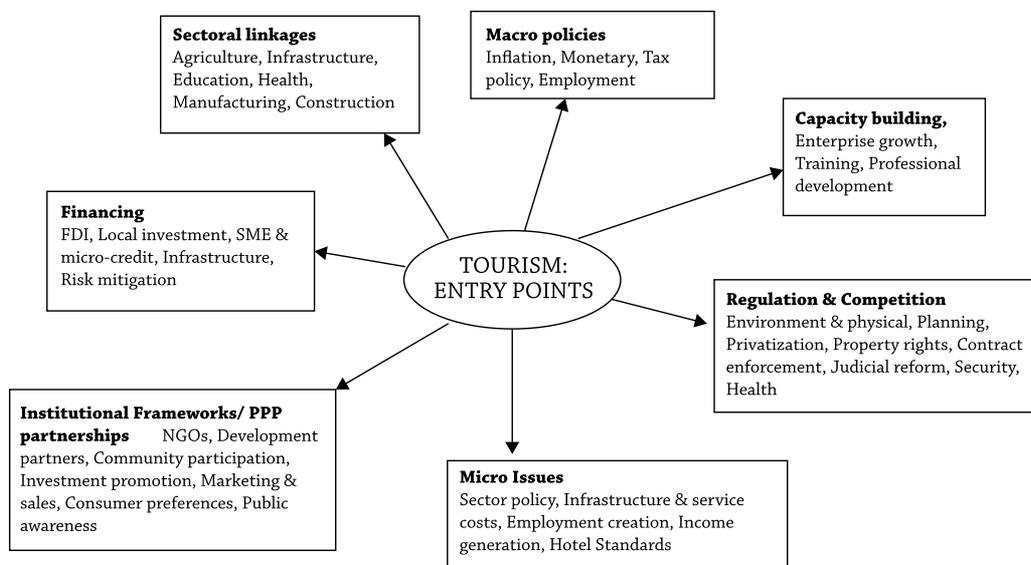


Figure 3: 1 Tourism Coordination Linkages

The plan recommends the creation of pyramid coordination framework with the local governments and grassroots tourism associations in the first bottom tier. The Uganda Tourism Association, TDA's, regional tourism clusters, development partners and inter-sectoral working group at the second tier and a Ministers coordination forum at the highest echelon.

3.4.1.8 Tourism Development Area (TDA) Planning and Management Approach

In order to efficiently utilise the vast tourism resources and enhance the levels of tourism planning and management across Uganda, this master plan, using the regional tourism planning approach, has identified six Tourism Development Areas (TDAs), distributed across the country. The TDAs are essentially development zones, or clusters, which designate tourism regions where integrated actions and programmes are proposed, in order to develop the tourism sector in a comprehensive and cost effective manner.

In determining the boundaries of the TDAs reference has been made to the administrative structure of Uganda and in particular of the recently adopted District Government areas. The country is subdivided into 112 district or urban areas, as illustrated in Figure 3.2. The proposed TDAs are superimposed indicating that 55 of the 112 Districts will be incorporated into the Tourism Development Areas in the first phase.

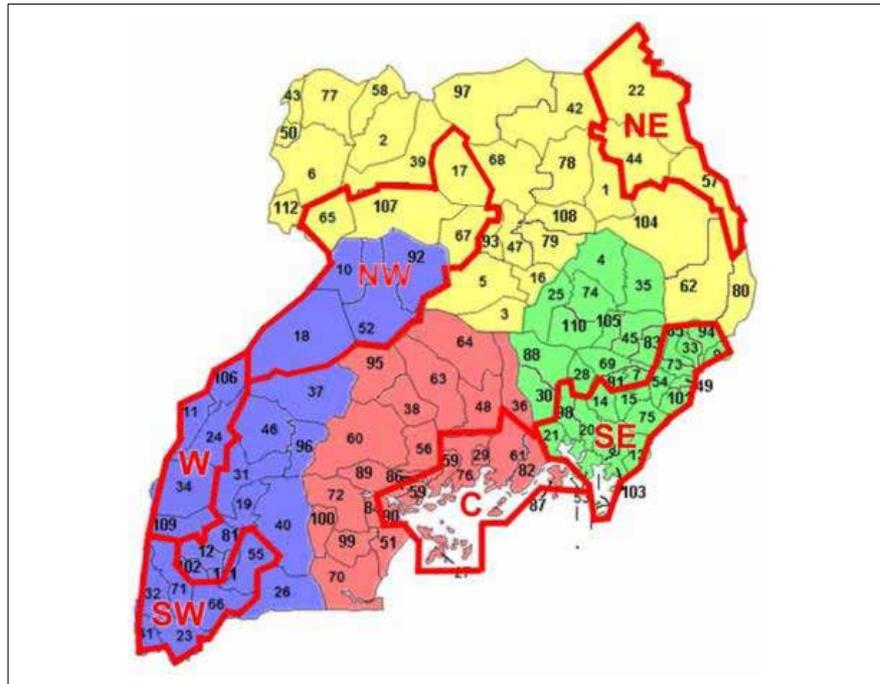


Figure: 3. 2 TDAs in Relation to District Boundaries

In order to make best use of resources, TDAs are located in the areas of the major established attractions, National Parks and Protected Areas. The designated Tourism Development Areas (with the proposed branding tag lines) are as follows:

1. The Central TDA, (the ‘Cultural Heartland’), comprised of Kampala, Kalangala, Mpigi, Wakiso, Mukono, Buikwe, Maksaka and Kalungu. The TDA focuses on Kampala as the capital city and main tourism service hub as well as Entebbe as the air gateway to Uganda. In addition this TDA incorporates the Ssese Islands and the Mabira Forest.
2. 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.
3. 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.
4. 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.
5. The North-Eastern TDA, (‘Cultures and Open Plains’) lays along the borders of South Sudan and Kenya and 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.
6. The South-Eastern TDA, (the ‘Nile and Adventure’), centred on Jinja and covering the districts of Jinja, Tororo, Luuka, Iganga, Manafwa, Mbale, Sironko, Kapchorwa,

3.4.1.10 Administration and management of the TDAs

For the TDAs to fully function there is need for a coherent, integrated and cost effective planning strategy that can be adopted and implemented. The established administrative framework should incorporate the views and needs of individual districts while reflecting the requirement to develop and implement common strategies in a timely manner.

Within each TDA, it is proposed that a Regional Tourism Hub be designated in one of the major towns and a Regional Tourist Office (RTO) be set up in each hub to guide the development of the TDA and assist local stakeholders in tourism planning and implementation.

The primary responsibilities of the RTO will be to coordinate the activities of local authorities and local tourism stakeholders, UTB and MoTWA, and provide a strong stimulus to the development and promotion of tourism in their regions. The specific roles of RTO will be as follows:

- Draft local tourism and product development plans, aligned to the national tourism development policies and strategy;
- Maintain an up-to-date inventory of tourist resources and attractions;
- Plan a regular programme of marketing and promotional initiatives in close co-ordination with the local governments, UTB and local tourism stakeholders, including local communities
- Seek and stimulate investment in product development, by identifying investment opportunities, and by providing a one-stop information resource for potential investors
- Provide a tourism information service for visitors through establishing and staffing Tourist Information Centres in key tourist locations;
- Assist in maintaining the registers of tourist accommodation and service providers, and help to collate tourism data

It is proposed that a Tourism Working Group (TWG) be established in each TDA, composed of members nominated by Districts within the TDA as well as representatives of other stakeholders including; the private sector, key tourism development agencies like UWA and NFA - coordinated by the Ministry of Tourism. The function of the TWG should be to establish and endorse policies and programmes to be adopted by the TDA and to ensure that such proposals are incorporated into District Physical Plans and development programmes. Implementation programmes endorsed by TWGs should be supervised by a Tourism Project Manager (PM) who should be located in the proposed regional tourism office.

The PM, who may require professional staff or consultants, should be authorised, with TWG approval, to enter into contracts and to supervise and coordinate all on-going tourism developments in the TDA.

TDAs and RTOs will be jointly funded by the central government and all the local districts covered, together with local private sector stakeholders who will mainly contribute to RTO marketing initiatives. Funding for TDA programmes should be channelled through and allocated by the TWGs. In order to rationalise resources and avoid unnecessary duplication of activities, it is proposed that MoTWA in collaboration with UTB, and in

consultation with local districts, establish a reporting and accountability mechanism. On overall, consideration should be given to establishing TDAs with the support of an Act of Parliament in order to establish a strong framework that is required to develop and coordinate sustainable tourism development across the country.

3.4.1.11 Regional bloc tourism planning and management

As noted in the situation analysis intra-regional travel is steadily increasing and a number of initiatives have been established to enhance regional tourism development. Despite this, there is still limited coordination and mainstreaming of regional tourism strategies in national plans. The strategic interventions suggested by this master plan include

- strengthen tourism related bi-lateral and multi-lateral relations with regional member states – to enable development of intra-regional tourism products, and coordinate regional infrastructure development
- create awareness of regional tourism development initiatives in Uganda such as the EAC Tourism Protocol, the IGAD Sustainable Tourism Master Plan
- Mainstream regional tourism plans/agreements in national tourism plans
- Strengthen existing regional tourism development initiatives – such as the EAC single Visa system
- Advocate and strengthen the regional tourism coordination framework to support the implementation and monitoring of regional initiatives

3.4.2 Tourism Destination Marketing

3.4.2.1 Introduction

The marketing interventions focus on the markets that can be influenced by strategic actions, namely the leisure market (including the special interest, domestic and expatriate markets) as well as the business market, in particular the conference and meetings market. While the faith-based market and the VFR market account for a substantial proportion of arrivals to Uganda, with the exception of the Ugandan Diaspora, these markets are unlikely to be influenced by marketing stimulus and are therefore not targeted in this marketing strategy.

The marketing strategy will adopt a phased approach that will reflect the pace of development proposed in the Master Plan and will ensure that the desired markets are approached in an effective and timely manner. At the centre of the destination marketing strategy there are two core strategies:

- market segmentation and the identification of target markets; and
- destination branding and positioning.

Determining target markets and developing destination products are interrelated tasks because of the relatively static nature of the tourism product at the destination. To attract markets suitable for the mix of products available at the destination, marketing interventions focus on identifying potential visitors with common characteristics and on developing the appropriate activities and services to satisfy their needs.

consideration should be given to establishing TDAs with the support of an Act of Parliament in order to establish a strong framework that is required to develop and coordinate sustainable tourism development across the country.

The second essential task in this strategy is to position Uganda as a destination vis-à-vis each target market and to endow it with a strong, easily recognisable and unique identity. Once these strategic actions are implemented there will be an increase in the number of tourist arrivals as well as business turnover.

3.4.2.2 A Phased Approach to Target Marketing in Uganda

The marketing strategy follows the phased approach of the Master Plan strategy, namely consolidation during the first phase, expansion and diversification during Phase Two and sustained growth during the third phase. Markets that will be targeted during the different phases are divided into categories according to their potential to generate tourists to Uganda (Table 16).

Table: 3. 1 Categories of Markets to be targeted

Category	Rationale	Markets	Phases
Tactical markets	Marketing activity to be applied when specific opportunities arise	Domestic, expats and regional expats, regional markets	1, 2, 3
Core markets	Greatest markets for generating tourists	UK, USA/Canada, Germany, South Africa	1, 2, 3
Investment markets	Good future potential in the medium to long term; initial investment to develop the markets to eventually become core markets	Europe (France, the Netherlands, Belgium, Italy, Spain, Scandinavia, Russia); niche markets (birding, mountaineering, white river rafting, sports fishing...); Asia (Japan, India); Australia and New Zealand; Middle East Expats; MICE	1, 2, 3
Watch list markets	Markets that are evolving and have long-term potential for Uganda	South America (Brazil), China, South East and East Asia; Middle East Arabs	3

Source: UNWTO Project Team, adapted from South African Tourism research

The tactical markets are those that can be attracted when specific opportunities arise such as special events, specific packages etc., these are markets within easy reach of Uganda (mostly living in neighbouring countries). Most of the core markets are already visiting Uganda and these present the best potential for growth. Investment markets are those with good future potential in the medium to long-term and should be nurtured.

Uganda needs to invest in its marketing effort aimed at these markets to eventually turn them into core markets. Markets on the watch list are those that have long-term potential assuming that they evolve as expected but do not warrant much marketing activity at this stage until they become viable or when good cost effective opportunities arise.

Phase One – Short-Term, 2014 to 2016

Phase one coincides with the period of the detailed promotional plan that will accompany the Action Plan presented in this Master Plan. During the first three years of the strategy, the focus will be on consolidating the core markets that already come to Uganda and expanding the segments within these markets. Statistical figures from UTB and UBOS show that (barring neighbouring markets) the international markets

that visit Uganda the most are from the USA, the UK, Germany, India and Canada. It is assumed that tourists from India at the present time are mainly visiting friends and relatives or come to Uganda for business. With over 16,000 visitors annually and direct flights from Johannesburg, the South African market is an emerging market with great potential.

Therefore during Phase One, the focus of aggressive marketing, particularly aimed at the leisure market segment, will be the following core markets:

- the USA/Canada
- the UK
- Germany and
- South Africa

Representation companies will be hired on an annual basis (rather than just a couple of weeks before a trade fair) and will be responsible for contacting operators in the source countries and promoting Uganda's tourism products and facilities to build up business. Rather than focusing solely on attracting high-end tourists, the market segments will be expanded and the publicity effort will extend to include categories of tourists that are looking for other levels of accommodation and services (mid-level and budget level), as well as other types of products available in Uganda and tourists who want to travel around and visit the country independently – the Free Independent Traveller (FIT). The aim for the targeted markets is to achieve an 8% annual growth rate by the end of Phase One rising to 10% by the end of Phase Two and ultimately 12% by the end of Phase Three.

During Phase One a concerted effort will be made to develop the domestic market and the expatriate market in Uganda and in the surrounding countries. These are considered to be tactical markets and the strategy will be to strongly promote events and festivals, day trips and short and weekend breaks as well as experiential products. In addition, awareness building about tourism in Uganda will be carried out during this phase in investment markets to prepare the ground for more aggressive marketing in Phases Two and Three. The markets that will be targeted for the awareness campaign will be:

- expatriates living in the Middle East who benefit from direct flights to Uganda via Dubai and are looking for exotic breaks;
- Europe – France, Italy, Spain, the Netherlands and Belgium, Scandinavia and Russia;
- Japan;
- India;
- Australia and New Zealand;
- MICE market in the neighbouring countries and with international organisations; and
- Niche markets.

Marketing at this stage will be subdued, seeking to place articles about Uganda in the media, engaging limited services from representation companies to work with operators that already feature Uganda in these markets, disseminating information online and taking action when cost effective opportunities arise. Attention will be particularly paid to exploring potential niche markets in these destinations such as the birding market, the sports fishing market, the mountaineering market etc. and the representation companies would attend events where these are featured in the name of Uganda Tourism.

Phase Two – Medium-Term, 2017 to 2019

By Phase Two, tourism products and facilities will have improved in Uganda and more capacity will be available. While the required marketing budget in Phase One will be quite high, the Phase Two marketing budget will need to be substantially higher as a greater number of markets will be targeted, the new TDAs like the Eastern Corridor will attract a greater number of tourists and Uganda's reputation as a tourism destination would have improved.

This is the phase of expansion and diversification, during which the markets that were targeted in Phase One are further consolidated and the markets included in the awareness campaign are now fully targeted with aggressive marketing activities. These will include the niche markets, the European markets, nationals from neighbouring markets (Kenya, Rwanda, Tanzania and DRC), the Asian markets addressed in Phase One and the expat market in Gulf countries. A full range of marketing tools and techniques will be deployed to grow these markets. If it is deemed that the situation has evolved, awareness-building campaigns will be aimed at other markets that are on the watch list such as the Arab Gulf market.

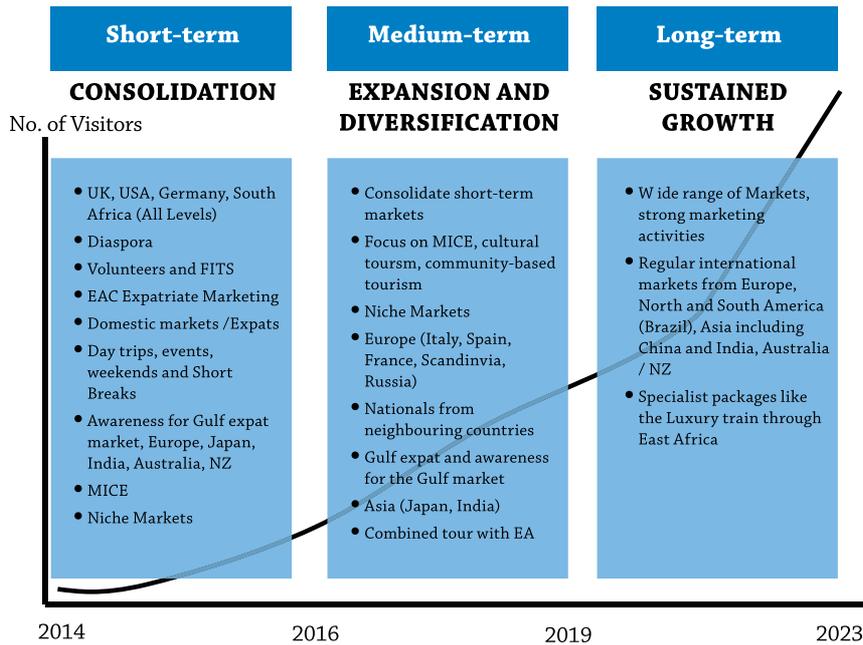
The focus in Phase Two will be on promoting MICE facilities that are being constructed in Uganda, alternative products such as those being developed by local communities and cultural tourism products. Building on the joint East Africa marketing initiatives, tour operators will be encouraged to develop combined tours linking the different countries of the region and taking advantage of joint EAC marketing initiatives. These will be promoted to strengthen the region in the global tourism arena. The target for the leisure and business markets by the end of Phase Two will be to achieve a growth rate of 10% per annum in arrivals to Uganda.

Phase Three – Long-Term, 2021 to 2024 and beyond

By 2021, the range of markets visiting Uganda will have become well established and the marketing efforts of the previous six years paying dividends. This phase is characterised by sustained growth and the emphasis will be on year-on-year targeted marketing actions. New markets that may not have been tapped or have not been successfully honoured will be targeted during this phase. Specialist products will be developed and promoted.

One example could be developing a luxury train product (using the South African Blue Train model) on the restored railway network based on the 2009 East African Railways Master Plan, which could bring tourists as far as Murchison Falls National Park. With the greater range of markets visiting Uganda, the target for the leisure and business markets at this stage will be 12% growth per annum. It should continue at this rate until Uganda becomes a major tourist destination in Africa and in the global arena, after which it should continue to grow at a steady year-on-year rate. A summary of the markets that are to be targeted over the life span of the strategy are presented in Figure 3.3

MARKETS THAT WILL BE TARGETED IN THE SHORT, MEDIUM AND LONG TERM



Source: UNWTO Project Team

Figure 3. 4 Target Marketing Strategy to 2024

‘Uganda, Pearl of Africa’ has remained strong and continued to be associated with the nation brand despite the several attempts to replace it with ‘Uganda gifted by Nature’. The cost of introducing a new tourism brand for Uganda would be prohibitive and the exercise is not guaranteed to succeed.

3.4.2.3 Branding, Positioning and Strategies Aimed at Targeted Markets

The strength and message conveyed by the tourism brand and the positioning that is adopted vis-à-vis target markets can effectively influence the image of the destination in the global market place.

The Uganda Tourism Brand

The situational analysis reveals that there is lack of consistency of the Uganda tourism brand. ‘Uganda, Pearl of Africa’ has remained strong and continued to be associated with the nation brand despite the several attempts to replace it with ‘Uganda gifted by Nature’. The cost of introducing a new tourism brand for Uganda would be prohibitive and the exercise is not guaranteed to succeed.

Thus the recommendation is to build upon the ‘Uganda, Pearl of Africa’ tagline and convert it into an established and recognisable tourism brand which is consistently used by Uganda’s tourism stakeholders.

The Uganda destination brands should convey the promise of a memorable travel experience that is uniquely associated with the destination. It should also serve to consolidate and reinforce the recollection of pleasurable memories of the destination experience¹.

3. Goeldner, Ritchie, and MacIntosh (2000) *Tourism: Principles, practices, philosophies*. 8th ed. New York: Wiley

The task of UTB is to link the story that describes the individuality, personality and positive values of the destination to the well-established tagline so that it immediately conveys its uniqueness and differentiates it from its neighbours. It is recommended that a PR or Advertising agency, experienced in destination branding, is engaged to research and develop the Uganda Tourism Brand, linking the well-established 'the Pearl of Africa' slogan with a powerful story and set of values that identifies Uganda's tourism benefits clearly, disengaging it to a certain extent from the nation brand. The agency should first carry out a brand audit, which will include a competitive assessment and a brand inventory, formulate a brand strategy and propose a brand execution strategy. Key actions will include:

- defining the brand attributes and benefits;
- identifying the brand personality characteristics;
- bringing out the core brand values and selling proposition;
- relating the brand essence to 'the Pearl of Africa' slogan; and
- designing the visual representation of the brand – the logo – that will encompass all the characteristics listed above in a simple but striking concept.

The audit agency will test the proposed brand with Uganda's tourism stakeholder to gain their approval and buy-in and with a cross-section of tourists to ensure that it achieves the desired effect and results.

The tourism brand will be dynamic and its adoption and establishment will evolve through several stages.

- The first year will be devoted to establishing and consolidating the new brand. A branding working group will be formed to meet on a regular basis. Their task will be to set up a system to monitor the take up of the brand among the Ugandan tourism service providers, its effectiveness with the consumers and to formulate a brand promotion plan. During the first year the brand will be applied to all MoTWA, UTB and other relevant institutions' stationary, publications, websites etc. and communicated to schools and colleges offering tourism and hospitality courses.
- During year two, the brand will be expanded to the major tourism sites and attractions and foreign tour operators featuring Uganda will be encouraged to use the brand in their literature and promotional efforts. The domestic tourism campaign, which will be conducted during Phase One of the strategy, will strongly feature the new brand including on the radio and in print advertising, on travel programmes on local television and on social media platforms.
- During the subsequent years, the brand will be prominent in international marketing and will be instantly recognisable as Destination Uganda. The objective is to trigger the automatic association of the 'Pearl of Africa' with Uganda in the international market, just as South Africa's success with the 'Rainbow Nation', Malaysia's 'Malaysia Truly Asia', and India's 'Incredible India'.

(a) Positioning Uganda vis-à-vis the targeted markets and strategies to address them

The image of a destination is influenced by the strength of the brand but also by how it is positioned relative to the different target markets. Positioning is how the mind of the tourist is affected by the destination and the place it takes up. It considers competition directly and finds a niche in the traveller's mind not occupied by some other destination. It must also take into account the relationship that the destination has with the market such as history, reputation and ancestral links and the extent of knowledge that the market has of the country.

This section considers the different markets that will be targeted during the strategy and recommends strategies to position Uganda within each market. The market profiles of visitors targeted in Phase One are described.

Positioning Uganda vis-à-vis the tactical markets

The Ugandan and East African Community National and Expatriate Market: Uganda should be positioned as a new destination to explore in the region during short breaks. The diversity of the Ugandan culture, events and festivals and the adventure tourism opportunities should be the hooks that convince the expatriate market from neighbouring countries to choose to visit Uganda. For expats living in Uganda, the positioning must be that there is always something to do in Uganda and there are always places to go for days out, weekends and short trips. For nationals of neighbouring countries, a strong marketing effort should be made to position Uganda as 'somewhere familiar but different, interesting, fun, friendly and safe'.

The Domestic Market:

There are several domestic tourism market segments with different interests: domestic families, domestic youth, the middle and upper middle class Ugandans and students, to name a few. The local market is more interested in events, relaxation and leisure pursuits than visiting national parks and viewing wildlife. Therefore Uganda must be positioned as a fun destination, with events and festivals to enjoy and leisure opportunities, especially at the beaches by the lakes.

For the youth, the adventure, active and sports opportunities should be stressed and for students the history, culture and natural attractions that the country has to offer. The student market should be targeted and developed through the facilitation and creation of tourism and wildlife clubs, persuading and promoting student tours with incentives and adventure opportunities. The middle and upper middle class Ugandans will enjoy breaks with a certain amount of comfort and luxury offering spectacular and/or emotional experiences (i.e. for instance taking a hot air balloon over Murchison Falls). Selecting the right pricing model is key to success for this market.

The Domestic market is best persuaded to travel during the weekend and the public or season holiday periods. The focus will be placed on developing and promoting weekend and holiday packages targeting the families in the key attraction areas. The plan should address the most binding constraints to domestic travel by supporting investment in affordable accommodation and transport in the attraction areas. The plan should support the strategy of developing regional tourism clusters to popularise attractions and activities. This will help draw traffic to the areas and popularise the regions as tourism destinations.

Cultural and faith based events have proved to be strong pull factors for domestic travel, in bid to develop the domestic market, the plan should focus on aligning mobilising and marketing programmes with cultural and faith leaders to promote events in varied attraction areas of cultural importance, pilgrimages and faith based crusades.

The MICE market attracts the corporate and public servants in activities of market promotion, sensitisation and training. The tourism board will target these groups and persuade the hosting of these events in varied locations. The organisers of these events should be encouraged to allow time or create incentives for these groups to visit attractions near the event/workshop/conference venue.

Strategies for the tactical markets:

These markets are primary markets that will be aggressively targeted from the outset. They are used to the East African context and therefore the marketing effort will be to promote activities and events that can be enjoyed in Uganda but also offer the educational opportunities for students as well as awareness building about the opportunities and benefits of tourism among relevant stakeholders. The following strategies will be pursued:

- A Calendar of Events and Festivals will be developed featuring, among other, Uganda Martyrs Day, Regional Tourism Expos, World Tourism Day, Mabira Biking Challenge, Nile Gold Jazz Safari, UNAA Home Coming Event, Annual Tourism Excellence Awards, gorilla naming ceremony, UMA Trade Show, Annual Tourism Birding Festival and will be widely publicised. Advertising will be web-based (social media, websites and blogs) but also prior to major events in local media (TV, radio, newspapers and magazines) as well as outdoor advertising. An annual budget will be provided for this. Current advertising rates in Uganda are provided in Appendix 4.
- Events, festivals and weekend break opportunities will be promoted directly to expatriate clubs in Uganda and in neighbouring countries through direct mail, email and social media like on the Facebook, advertising on websites dedicated to expatriates such as the relevant sections of Living Abroad Magazine – (livingabroadmagazine.co.uk/)-andinInterNationExpatriateMagazineandproviding information to blogs like the Expat Wives Club (www.africaexpatwivesclub.com)

Music festivals and sporting events will be strongly promoted to the domestic market as well as to nationals living in neighbouring countries and, if possible, planned during the shoulder and low tourism season.

- Products that are especially suitable for the domestic market will be developed to bolster this important segment. TDA report describes several products that are suitable for the domestic market and provides concept plans for their development. These include (amongst others) the Kampala Tourism Circuit, Lutoboka Beach Development, and the Source of the Nile attraction and site development. The proposed Exhibition and Conference Centre will be a major facility for the Ugandan business community.
- Local enterprises that cater for the domestic market will be supported to encourage the development of suitable products. The investment section provides a number of strategies to stimulate local entrepreneurship in the tourism sector.
- UTB will organise an annual Regional and Domestic Trade Fair where service providers can present their products i.e. organised packages aimed at the domestic market, accommodation options, restaurants, bars and nightclubs,

the products of adventure activity firms, attractions, community-based tourism initiatives, handicrafts, performance troupes, and so on...

- UTB will organise at least three road shows per year around the country and, during Phase Two, in neighbouring countries to present the opportunities that Uganda has to offer the domestic market and the regional markets.
- UTB in collaboration with its partners will organise domestic familiarisation trips with the media to encourage coverage in the electronic media and articles in the published press.
- UTB will set up desks or stalls at events that the domestic market and the expat market attend to distribute information and promote events and packages.
- Several awareness campaigns will be conducted to expose the variety of attractions and experiences that can be enjoyed in Uganda and the benefits and pitfalls of developing tourism in the country. Recommendations are made for awareness campaigns aimed at local communities, diplomats and policy makers and schools.
- School in particular will be targeted and a campaign to encourage visits to sites and attractions around the country will be conducted on an annual basis. This will include making presentation at schools – at least 50 schools will be visited each year (this may be outsourced to an outside training or marketing firm). If the funds are available, UTB can organise visits for selected schools and provide transport, guiding and entrances.

(b) Positioning Uganda vis-à-vis core markets

- **The UK, USA and Canada markets:** Because of historical links, widely spoken English language and the large Ugandan Diaspora settled in the UK, the USA, and Canada there are several positions that can be taken vis-à-vis these markets depending on the segment targeted. For the leisure tourists, prime products such as Gorilla and Chimpanzee tracking and Uganda's exceptional wildlife should feature strongly but the emphasis must also be on promoting the great diversity of tourism experiences that can be experienced in Uganda compared to its competitors like its rich culture, the history that links it to Britain, and the varied environments that Uganda has to offer. Specialist products that Uganda excels in such as world-class birding and exciting and challenging adventure opportunities are of particular interest to certain segments of the market and should be promoted. The message should be that there is (or soon will be) a full range of tourism products for different categories of British and North American tourists to enjoy from the high-end visitor to the mid- and budget-level tourist and those wishing to pursue special interests. As identified in the current UTB marketing plan these are the world's leading tourism spenders and travellers and are used to taking an annual holiday.

Members of the Diaspora have personal links with Uganda depending on when they emigrated. First generation emigrants will return to the mother country mainly to visit friends and relatives and will most likely be accommodated in their homes. They will generally enjoy the same products as their hosts and act like domestic tourists but often with a greater budget to spend on leisure and entertainment. Second and third generation overseas Ugandans will be interested in experiencing as much of the country as they can, based on stories

they have heard from their parents, grandparents and relatives and will want to see all the attractions (including the prime products), especially those that relate to their ancestry. The Diaspora is generally fairly easy to reach as they often have associations, newspapers and community facilities and events that can be excellent distribution channels to disseminate information on Uganda, offer packages to visit Uganda and organise functions that involve association members.

The business segments of these markets should not be ignored. The UK is one of Uganda's main trading partners in the EU.

- **The German market:** Germany is one of the greatest tourism generating market in the world. Market research shows that they tend to have a longer length of stay than other major generating markets, they enjoy a high standard of living and more than 900,000 residents are High Net Worth Individuals². They are particularly interested in nature and the natural environment but also in cultural heritage. Safety at the destination is an important factor. Uganda should be positioned as a world-class nature destination with a rich and diverse African culture. For first timers to Africa it should be promoted as a safe and friendly introduction to Sub-Saharan Africa, which presents the best of what East Africa has to offer. Berlin annually hosts one of the biggest Travel and Tourism Trade Fair in the world (ITB), which is a prime opportunity to present Uganda to German and global tour operators.
- **South Africa:** With a growing middle class which is lifestyle orientated, South African tourists are particularly interested in shopping, entertainment, rest and relaxation, visiting historical sites, museum and art centres and enjoy general sightseeing and scenic spots. South Africans are concerned with security and safety when travelling abroad and prefer to travel during the months of December, June and April. According to a survey for the Nation Brand index in 2009, South Africans choose destinations based on their natural scenic beauty (73% of people polled), weather (58%), and history and culture (55%)³, three of Uganda's strong attributes. Uganda should therefore be positioned as an ideal destination that ticks all these boxes, just a few hours away (there are direct flights from Johannesburg to Entebbe).

South Africa is a strong trading partner within Africa and therefore business tourism, is and will continue to be, an important source of visitors to Uganda. In Phases Two and Three Uganda should be positioned as a good MICE destination.

Strategies for the core markets

These are the priority markets that will be aggressively targeted from the outset of the marketing strategy. The main objective is to grow these markets and to expand the market segments within these markets.

For all core markets:

- Full-time representation will be engaged at the beginning of the year, selected representation agencies will present an annual marketing and PR plan reflecting

4. Ireland and Visit Britain market research: <http://www.visitbritain.org/insightsandstatistics/markets/germany/overview.aspx> and <http://www.tourismireland.com/CMSPages/GetFile.aspx?guid=dc0e2356-5892-44c0-a2c4-cad17abd2373>

5. Visit Britain: http://www.visitbritain.org/Images/South%20Africa_tcm29-14685.pdf

the objectives of Uganda's marketing strategy. Functions will be organised by the representation companies as well as road shows to showcase special events taking place in Uganda, the launching of new facilities or to present the progress of the tourism development effort in the country. Trade fairs such as WTM and ITB will be prepared well in advance, invitations sent to firms and people that the exhibitors want to meet and additional activities organised to bring visitors to the stall during the fair. Familiarisation trips inviting the most influential journalists and the tour operators that are most likely to feature Uganda in their portfolio of packages will be organised by the representation company. In the USA, Canada and the UK, a special focus will be on the Diaspora as they are easy to reach, have already a deep connection with Uganda. The Diaspora Associations in these countries can partner in the marketing effort.

- According to the Ugandan North American Association (UNAA), there are 120,000 people of Ugandan descent in the USA and Canada. A 2006 survey in the UK explains that the number of people of Ugandan ancestry living in the UK are between 180,000 and 350,000, 85% of which live in the London area, and if the descendants of the Ugandan Asian that were expelled by Idi Amin are included, the figure could be as high as 750,000⁴. If deemed an appropriate use of budget, road shows may be organised where the Diaspora are located.
- Targets will be set for the representation company to achieve, for instance convincing 20 vendors a year to feature Uganda in the portfolio of packages they offer, generating 10 to 20 articles and features annually in the source country's media describing tourist attractions in Uganda, organising or attending 20 functions a year to showcase Uganda, present new products and explain the progress of tourism as it develops over time. These will be reviewed annually and adjusted as required.
- For the first three years at least two trade fairs per country will be attended (for instance the following fairs may be considered: in UK, WTM and Birdfair; in Germany, ITB and Passion Sport Convention in Bremen; one fair in the USA and one in Canada to be selected by the representation agency and could also involve UNAA during its annual convention; Indaba and Cape Outdoor Eco Adventure and Travel Expo in South Africa). Uganda will also attend Karibu in Tanzania.
- At least two familiarisation trips (FAM trips) per country should be organised each year from the core markets. In total at least 10 to 12 trips should be organised from all markets.
- Advertising in the international media will be used sparingly and strategically, and will be aimed at the travel trade rather than at the public, for instance advertising in trade fair brochures. However, the representation agency may identify cost-effective opportunities to partner with tour operators in the generating country to advertise in the media or online. It should be absorbed in the budget that the agency receives; if necessary an additional budget will be made available.
- A range of collaterals in the language of the core markets (for Phase One this will be in English and in German) will be developed and distributed by the representation agency to their contacts and clients, by Uganda Embassies and

6. *International Organisation for Migration (2006) Uganda Mapping Exercise, London*

The Chinese market should be observed as a Watch List market during Phases One and Two as it is reported that presently the main motivations of Chinese tourists are to gain prestige with their peer groups, to 'radiate soft power' and, as first generation travellers, to experience luxury travel.

Consulates, at trade fairs by the Uganda Tourist Board and at places where tourists of these markets may congregate such as airports, specific events etc. In the first three years, a Sale Manual and a Media Kits must be published and widely distributed to relevant people.

- Uganda will participate in all marketing activities organised by the joint EAC marketing partnership.

(c) Positioning Uganda vis-à-vis the investment markets

General markets

These include European countries that are already visiting Uganda in small numbers but have the potential of becoming major tourist generating countries such as France, the Netherlands and Belgium, Scandinavian countries, Russia, Italy, and Spain. Markets further afield such as Japan, Australia, New Zealand and expatriates from the Middle East are markets to be nurtured. For these markets the position is similar to that of core Western markets, namely to emphasise the exceptional wildlife that can be seen in Uganda but also the great diversity of tourism experiences that can be experienced compared to competing destinations.

The Indian market should be treated differently as many visitors and potential visitors would want to come to Uganda to see their friends and relatives and would therefore act like domestic tourists. A significant proportion comes to conduct business. For the latter, Uganda should be positioned as the land of opportunity, an emerging economic powerhouse in Eastern Africa.

The Chinese market should be observed as a Watch List market during Phases One and Two as it is reported that presently the main motivations of Chinese tourists are to gain prestige with their peer groups, to 'radiate soft power' and, as first generation travellers, to experience luxury travel. Currently their main purposes of travel are business trips, VFR, relaxation, shopping and trading, and showing off towards their neighbours⁵. This market should be targeted during Phase Three once it has become more knowledgeable about international tourism and about the attractions and opportunities presented by Uganda.

Niche markets

Uganda is an exceptional destination for bird watching enthusiasts with over 1,000 species of birds to spot, some endemic to the country, comprising 67% of Africa's and 11.1% of the world's total population of species. Species, such as the Shoebill, which is only found in Uganda, are much prized by birders. The bird watching market is a particularly lucrative and committed segment which should be prioritised.

Other niche products that attract specialist markets include adventure and sports tourism like river rafting, mountaineering and sports fishing, cultural heritage to learn about the history and culture of Uganda, and people interested in community-based tourism activities to understand and experience how local communities live.

The positioning for niche markets is to highlight the vast variety of opportunities that Uganda has to offer – Uganda has world-class niche products, especially birding and

7. *China Outbound Tourism Research Institute*; <http://www.china-outbound.com/cotri.html>

hiking in the Ugandan mountains but also rafting and sports fishing. The setting and weather makes Uganda a particularly attractive destination to pursue their special interest.

As previously discussed, the MICE market is currently buoyant in Uganda and developing at a fast rate. Its main constraint is the size of venues available. The Master Plan proposes a new facility that will rival facilities in neighbouring countries (Refer to TDA report).

Strategies for the investment markets

The strategy for these markets is to build awareness of Uganda as a tourism destination.

- There should be a degree of Market Representation but with fewer overall services. The agencies recruited would cover several territories, for instance one agency would be appointed for the Scandinavian and Russian markets, another for France, the Netherlands and Belgium and a third for Spain and Italy. One agency would cover Japan, another Australia and New Zealand and a third India. They would be tasked to contact tour operators in the source countries and present the opportunities that Uganda has to offer, generate media exposure, attend events on behalf of Uganda Tourism, undertake specific assignments when required such as identifying appropriate candidates for familiarisation trips, and assist in the participation at trade fairs, etc. An average budget of USD 70,000 per agency commissioned is allocated for awareness building.
- Expats in the Middle East would be reached through their associations but limited services of an agency in Dubai may be used that would also build awareness of Uganda in the Arab market. Agencies like Kwanza Trade Marketing in Dubai have good experience in representing sub-Saharan African destinations in the Middle East.
- Each year Uganda should attend at least three selected trade fairs to build up awareness in these markets. These may be JATA Tourism Forum and Travel Showcase in Tokyo, the Arabian Travel Market in Dubai, FITUR in Spain, BIT in Milan, Salon Mondial du Tourisme or IFTM Top Resain Paris, International Travel and Tourism Market in the Hague, TUR in Stockholm, Australian Tourism Exchange in Sydney, SATTE in Delhi or the Indian Travel Mart in Mumbai, and China International Tourism Industry Expo in Guangdong Province in China
- Collaterals in English but eventually in the language of the country as the numbers of arrivals grow will be distributed to tour operators and journalists via the representation agency and the trade attachés at the Ugandan Embassies and Consulates.
- For the niche markets, Uganda may be represented at relevant fairs such as Birdfair in UK. Some limited advertising may be commissioned in specialist magazines and on specialist websites to build the awareness of Uganda's specialist opportunities. However, the rule of 7 should apply, i.e. it takes at least 7 adverts over a reasonable span on time for the message to get through to the desired audience. Advertising rates are reasonable in specialist magazines such UK's Bird Watching magazine, Adventure Travel Magazine among others (Figure 3.4)

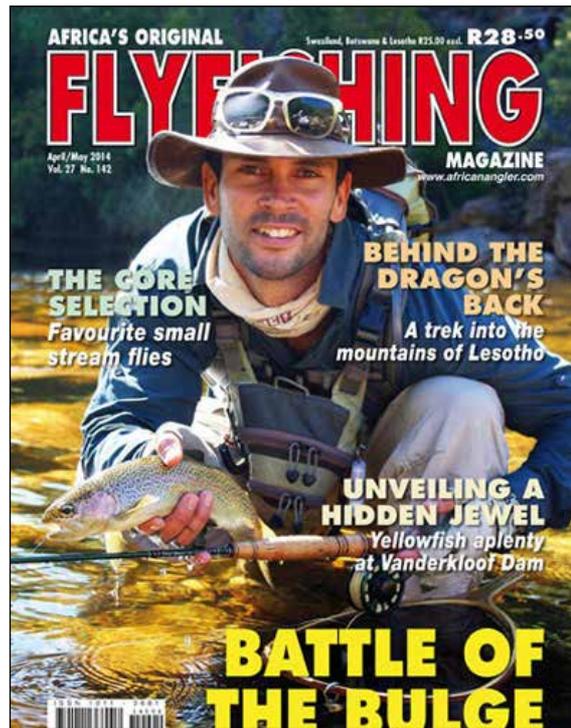


Figure: 3. 5 Selection of Special Interest Magazines for Targeted Advertising

- To attract the MICE market, UTB will appoint one or two sales staff responsible for building MICE business for Uganda. They will make sales trips within the region to present the facilities and contact details of service providers in Uganda and attend relevant Business Travel Trade Shows.

Positioning Uganda vis-à-vis the markets on the watch list

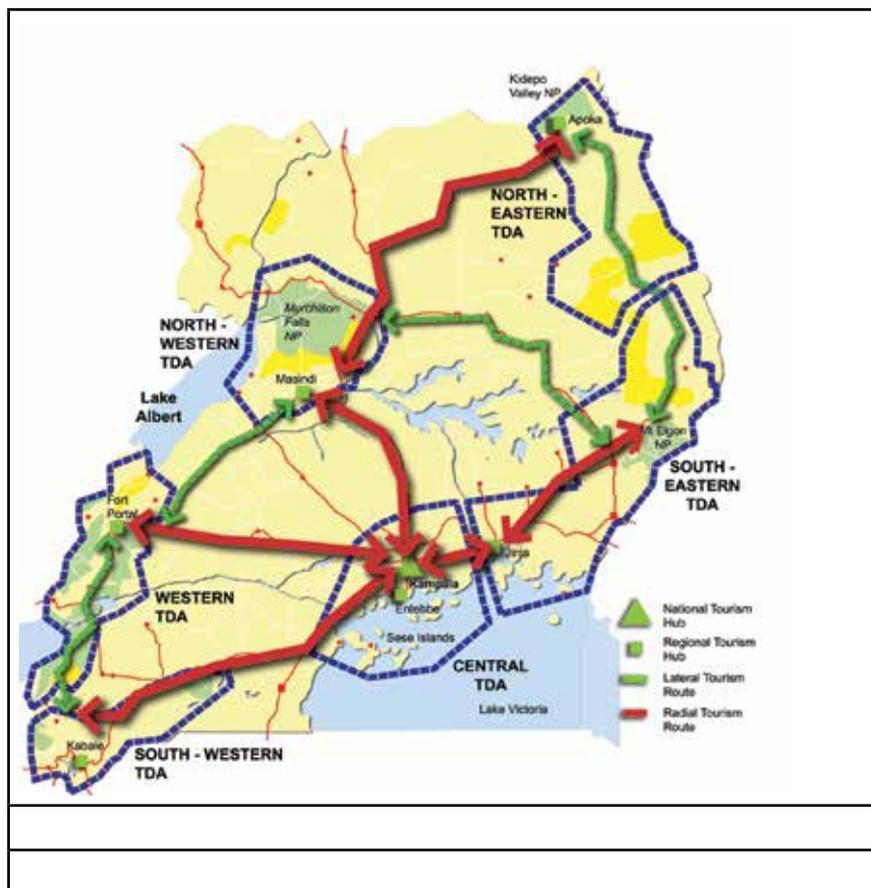
Markets in the Watch List category are markets that are either emerging international generating markets, are located far from East Africa or with limited air access to Uganda, or markets with which Uganda does not have the type or quality of tourism products that the market expects. These include countries like Brazil, South Korea, Taiwan, Singapore, Malaysia, and countries in Central and Eastern Europe. The Arab market expects high quality services and shopping experience and is a market for the future when Uganda has built up its capacity at this level.

Strategies for markets on the watch list

Minimal investment at this stage is recommended for markets on the watch list. However, trends in these markets must be monitored and if it is estimated that they could be a lucrative market to address then they should be placed on the investment markets list and treated accordingly. For some countries this is expected during Phase Three of strategy. However, should cost-effect opportunities arise, these must be taken advantage of.

3.4.2.4 Markets that will be attracted to Uganda’s TDAs

Each tourist area in Uganda will attract a variable range of markets and this becomes a major factor in determining development within these areas. The different market ranges to be attracted are explained in the product development section. the product development section.



In order to broaden the consultative framework generating the marketing priorities, a marketing advisory group with a public private sector composition will be formulated to support the tourism boards marketing planning activities.

3.4.2.5 Strategic Interventions to Improve the Marketing of Destination Uganda

This section addresses the issues that are impeding Uganda's marketing efforts as identified in the situation analysis. Strategic interventions are made to improve the marketing of Destination Uganda.

Establish a Marketing Advisory Committee

In order to broaden the consultative framework generating the marketing priorities, a marketing advisory group with a public private sector composition will be formulated to support the tourism boards marketing planning activities.

The key agencies from the public sector will include; the Ministry, UWA, CAA, NFA and KCCA while the private sector will include the representatives from the key tourism associations like UTA, AUTO, UHOA, COBATI and USAGA and the corporate institutions that supply the tourism chain and provide useful expertise and partnerships in developing the sector. These would include representation from key sectors like the beverages, communications, airlines and financial institutions. This market advisory group would also benefit from representation of key development partners that support the marketing initiatives of the Board.

The marketing advisory group should be instrumental in advising the board on the following issues; resource mobilisation and supporting the marketing fund for promotional initiatives, setting priorities of key marketing initiatives, attracting partnerships and co-branding initiatives.

Establish a Marketing Fund

The principle of contributing towards national marketing efforts by the various stakeholders is acceptable and an innovative approach towards augmenting the limited national marketing budgets. The challenge has been the adhoc nature of these fundraising efforts that have affected planning and the accountability process.

In this regard, the Board should initiate the creation of a marketing fund and formalise agreements with key beneficiaries from the marketing efforts specifically UWA, CAA and KCCA to contribute towards the national marketing efforts. This fund will also manage the resources raised by the tourism development levy.

Set up a Tourism Observatory

Uganda's tourism statistics are extremely weak and, in some instances, misleading. While several studies have been completed in recent years these are one-off studies designed for a specific purposes. The Uganda tourism sector needs a systematic method to collect a range of data, which are required by various categories of stakeholders in order to take decisions. Investors need to understand trends to base investment decisions, marketers need to understand where tourists go, what they do, what they like and how much they spend. Governments need statistics to assess trends and changes in the sector, understand the economic importance of tourism and compare it with other sectors, and monitor the resource base for planning purposes.

The range of statistics required to manage and grow the tourism sector is comprehensive. The following categories of statistics should be collected: Demand statistics: arrivals, seasonal variation, traffic by month, length of stay, purpose of visit (business, pleasure, culture, adventure, special interest, faith, health, education), nationality and place of

residence, socio-demographic information (sex, age, income, education), expenditure (including transport payments), travel behaviour (transport and accommodation choice), activities engaged in during the visit, main sources of information, trip planning characteristics, lifestyle information, trip rating

Supply statistics: number, location and classification of attractions, accommodation, transport companies, travel service firms, catering and retail outlets, access and infrastructure, load factors, occupancy rates, sources of finance

A number of surveys should be carried out on a regular basis:

- Airport visitor surveys (exit, arrivals)
- Hotel occupancy rate survey
- Monthly accommodation statistics survey
- Household tourism expenditure survey
- Inbound and outbound tourism survey

It is clear that UTB does not have the capacity or the resources to operate such a comprehensive tourism statistic collection and interpretation system. In many countries in the world, this task is outsourced to research companies, universities or specialist government branches that set up what is generally termed as a Tourism Observatory. This research unit, exclusively dedicated to collecting the relevant information required to manage, monitor and grow tourism in the destination, provides a platform for objective observation. It will work with other data collection organisations and research units such as UBOS to ensure that information collected is accurate, error free and that it is interpreted properly. Since the organisation will be commissioned on a commercial basis, it will be more likely to deliver good quality data within the timelines agreed, as if it does not provide the expected information it will be replaced. It will be required to report to the Statistics Manager at the Ministry of Tourism, Wildlife and Antiquities. Universities with a solid research background in tourism and with a pool of experienced researchers would be ideal partners to work with the Ministry, utilising statistical software and online services commercial available.

Upgrade the UTB Website

As described earlier, UTB is currently developing a new tourism portal. It is clearly presented and offers a lot of information, not all of which is of interest to the different categories of visitors to the site. Tourists that visit the site want to know about holidays in Uganda. The travel trade such as tour operators in generating countries are interested in how to do business in Uganda and who to do business with, journalists are searching for interesting stories on Uganda that they can use.

Therefore, it is strongly recommended that the website is divided into three clear sections:

- A travel section: this is aimed at the general public interested in visiting Uganda or those just curious about what Uganda has to offer. It should feature Uganda's tourism attractions and present attractive photos and movie clips, an historical and socio-cultural background to the country and practical information about travelling and staying in Uganda.
- A section for the travel trade: this page should provide news and information on tourism and tourism development, links to government institutions, government plans and statistics, practical advice on the business environment in Uganda

and contact details (including links) of tourism service providers such as ground handlers and transport and accommodation providers.

- A section for the media: journalists want access to past articles (these should be available on the website), press releases and high-resolution photos that they are allowed to download (free of copyright restrictions).

Develop a Sales Manual and a Media Kit

The Sales Manual: The Sales Manual is designed to help tourism professionals like tour operators and travel agents sell the destination. It should contain important information for them to evaluate different products and service providers in Uganda and to make decisions on the opportunities that they would like to exploit. The objective is to provide them with a useful and comprehensive selling tool with vital tourism information (Appendix 5). This manual should be published on a regular basis with certain parts published yearly in a pull out section.

The media kit: A public relations office and a pressroom should be established at the UTB offices where visiting journalists, travel writers and travel bloggers (collectively termed as the 'media') can pick up information. This should be run by professionals who are knowledgeable in arranging customised media tours, directing media to attractions, and providing story angles that will best fit a writer's audience. To effectively engage the media in promoting tourism in Uganda a press kit (also known as a media kit or a press pack) must be developed to support journalists with the information they need to write about the destination and present it in the best light. The PR department at UTB must therefore put together a press kit to present Uganda to the media.

The press kit comprises a set of materials organised for ease of communication to inform people like reporters about the details of the destination by providing information sources, news items and describing any developments and plans. It should be constantly updated and sent to them on a regular basis and be available on the Internet, at the Uganda Tourism website aimed at the travel trade and at the media.

Establish a Public Relations (PR) unit at UTB and establish a Crisis Management System

PR is a powerful marketing tool that helps determine how to communicate with every target group or audience with whom UTB interacts. This includes media, suppliers, travel agents and consolidators, tour operators, guests, the general public and other government departments. The main purpose of a PR unit is to influence target groups so that they view the destination positively. This includes:

- informing the media about important events through press releases;
- generating positive media coverage both in the domestic market and in the international market;
- managing relationships with the media and the travel industry both at home and abroad and maintaining contacts on a regular basis;
- lobbying opinion leaders and key public figures to put in place the right conditions to market the province;
- encouraging the tourism industry and the local community to support marketing activities, and
- managing crises that threaten to disrupt the tourism sector in the country.

PR is particularly important during periods of crisis and after the crisis. PR staff should be critically involved in the crisis management plan, as they will be the main link with the media and the general public. They must maintain close contact with the media reporting the crisis (and with journalists that would be likely to report on future crises) in order to exert some control on information that is released to minimise negative impacts and to ensure that reports are presenting a fair representation of the situation. PR should be involved at all stages: anticipating potential problems, directing information flow during crises and maintaining relations with the media after crises to present the normalisation of the situation and rebuild the image of the destination.

Once the situation has calmed down after the crisis, the promotional efforts must be redoubled. The media should be informed about the overall impact of the crisis and what has changed as a result. It is important for public relations to be proactive and to promote what is being done about restoring the situation to normality, rather than being defensive. Cooperating with the press and keeping it informed about progress and recuperation plans shows that there is nothing to hide. When the situation improves, the press should be invited to see for itself. The emphasis is now on rebuilding the image of the destination and this needs greater cooperation between all role players, important increases in marketing spend, and more aggressive marketing of the country.

If crisis management is successfully carried out, in many cases a great deal of sympathy will be generated. Interest about the progress of the restoration and rebuilding efforts will attract the support of journalists, and through them, the public at large. Tourists will start to flow back to the destination. An efficient public relations effort will strengthen the relationship with the media and created new contacts that can be of future benefit.

3.4.3 Infrastructure Development

As earlier noted in the situational analysis the quality and quantity of tourism infrastructure is still limited in most parts of the country especially in the rural areas. It is also noted that a number of programmes have been designed to try and improve on the available infrastructure stock.

The Tourism master plan recognises the need for an integrated and collective approach to improve access for tourists within Uganda and also improve tourism related facilities and services. The master plan notes the need for:

- urgent improvement in the condition of the road network that serves Tourist Development Areas;
- improved choice and quality of transportation for tourists; and
- development of a more multi-modal transport and access framework to include increased air transport, water-based and rail transport.

Strategic interventions are therefore suggested with regard to each of the infrastructure categories.

3.4.3.1 Road transport infrastructure

In order to improve access roads within Uganda and to tourist sites in particular the master plan suggests a phased approach:

- In the short term: the upgrading of the poor quality of some parts of the road infrastructure network. In particular, the strategic tourist roads, which provide important access to key tourist sites, together with the strategic routes that link the principal national parks in the west of Uganda, need to be urgently improved.

The strategic tourist roads, which provide important access to key tourist sites, together with the strategic routes that link the principal national parks in the west of Uganda, need to be urgently improved.

- In the medium to long term: the completion of a comprehensive paved road network within Uganda, and in the north and north east of the country in particular. This will provide a faster and more comfortable vehicular route to tourist attraction sites in those areas such as Kidepo National Park and Mt Elgon National Park.

However, apart from the construction of the roads the master plan emphasizes the need for the following to be integrated within the tourist road network

- Ensure that road transport is linked and integrated with the other forms of transport like by water and air
- There is a dedicated tourist bus services to the national parks and other key tourism areas
- There is provision of rest stops, with clean toilets, food and beverage outlets, and some landscaped seating areas
- Ensure provision of standard and quality signage on major roads with in key tourism areas

The MoTWA and UTB should therefore liaise regularly with UNRA and MoWT to monitor which road improvements are being given priority. A study should be carried out to develop and implement a framework to facilitate development of convenient tourist rest stops at suitable locations and the provision of proper signage along tourist routes and major highways. This will assist in the programming of potential tourist development initiatives in those specific areas that will benefit from improved access.

3.4.3.2 Air transport Services

The master plan strategic interventions for improving air transport services include

- Expansion of Entebbe International Airport to increase capacity and improve passenger facilities and services;
- Provision of an international arrival point closer to the tourist focus of the national parks in the west of Uganda. An international arrival point closer to the tourist focus of the national parks would offer alternative options for tourist access to Uganda and its key tourism assets, reduce travel times and increase tourism expenditures. The upgrade of the facilities and runways would improve safety and reliability and would allow a wider range of aircraft to utilise the airfield with the potential for greater viability and capacity of domestic flights, including to some of the key tourist areas. It would allow tourists to avoid either the long journey by road, or the need for an additional flight connection form Entebbe.
- Upgrade of domestic airfields to facilitate and create a more competitive market for the provision of a more frequent and wider range of domestic air services with the opportunity for increased viability and lower costs to travellers. There are a significant number of existing airstrips in Uganda, including in the west of the country close to, or within, some of the key protected areas that form the tourism attractions within the country. Pakuba (for MFNP), Kidepo (for Kidepo NP) and Kasese airfields (for QENP) are already included in the CAA's proposals to upgrade five airfields throughout Uganda for potential international access - Gulu and Arua being the other two. The CAA has prepared master plans for the upgrading of Gulu and Kasese airfields. The CAA also supports the development

and improvement of the private airfield at Kihhi, which serves as an alternative to Kisoro when the latter is unavailable due to bad weather. Both of these airfields are well placed to provide access to Bwindi NP.

It is important therefore that there is regular liaison between MTWA, MoWT and the CAA to ensure that there is co-ordination between the proposed improvements and increased services to the airfields and development initiatives.

3.4.3.3 Water Transport Services

Water transport offers great potential linkages that could connect between different tourist areas and form part of the tourist circuit. The following strategic actions need to be addressed to improve water-based services within Uganda and to tourist sites in particular:

- Identify and map all navigable water bodies
- Investigate the potential for water-based tourism activities, tourist circuits and strategic linkages
- Improve on frequency, quality and speed of passenger and vehicle ferry services across short distances
- Monitor and regulate water transport providers to enhance tourists safety
- Make water transport attractive for private investment

There is generally need to enhance the frequency, quality and safety speed of water transport services.

3.4.3.4 Rail Transport Services

As noted in the situational analysis the Ugandan rail network is currently largely disused, but over time sections are being restored. The rail line between Tororo and Pakwach is partly operational though initially only for goods services. Important to note is that the line routings run close to several national parks, including Murchison Falls, Queen Elizabeth and Mt Elgon National Parks. This offers an opportunity for the line to form part of a more integrated and multi-modal tourist movement network around Uganda. Tourism, in itself, may drive the initiatives to reinstate and augment the rail network within Uganda. However, there is the scope for any improvements that are taking place to provide passenger services that might be suitable for tourist visitors, to identify routes that could provide strategic linkages for tourists to access tourist sites (Pakwach for example, to serve Murchison Falls National Park, or Kasese for Queen Elizabeth National Park) and to establish tourist rail excursions. Therefore there is need for appropriate routes, circuits and/or destinations to be planned for.

Strategic interventions are therefore required to ensure liaison and discussions take place between MTWA and MoWT to establish the planned improvements to the railway network and to explore the opportunities to integrate tourism-based passenger services with new or refurbished rail lines. More so tourism should strategically position itself to benefit from the proposed railway line linking Kenya, Uganda and Rwanda announced by the heads of state of the three countries, in June 2013. It will involve the refurbishment of some of the existing narrow gauge tracks as well as the construction of a new standard gauge line, connecting Kenya to Rwanda, via Uganda. These lines offer the opportunity for the reinstatement of passenger services and rail linkages to serve tourist sites along the re-established route.

Strategic interventions are therefore required to ensure liaison and discussions take place between MTWA and MoWT to establish the planned improvements to the railway network and to explore the opportunities to integrate tourism-based passenger services with new or refurbished rail lines.

In general the current modes of transport for tourists are almost entirely by road, with limited air services and no rail or water-borne strategic travel choices. The provision of a broader-based, multi-modal network of transport within Uganda, offers more choice and variety as well as opening up opportunities for tourism development in parts of Uganda that are currently not taking advantage of their natural assets and resources.

3.4.3.5 Accommodation

In the situational analysis it's noted that although Uganda is relatively well endowed with arrange of accommodation facilities, bed numbers are limited and occupancy rates are low at the high end facilities especially in National Parks and mid-market accommodation options are limited and few are considered good value for money. At the budget end, although high occupancy rates are reported, there is demand for more good quality accommodation.

A number of strategic interventions are suggested and they include

- Encourage and support investment in accommodation sector (especially in the mid-range and budget) in key tourism areas
- Encourage establishment of homestays and hostels as alternative accommodation option
- Enforce service and accommodation standards regulations
- Attract and ensure well planned accommodation facilities near tourism destinations such as National Parks
- Ensure building standards are followed to ensure safety of the tourists
- Promote use of unique and indigenous building materials and interior designs
- Identify potential locations and construct modern conference and exhibition facilities within six tourism development zones

3.4.3.6 Utilities

As earlier noted in the situational analysis, the availability and quality of power, water, ICT, visitor information and waste management facilities are very crucial in determining visitor satisfaction and destination choice. The master plan cognisant of the prevailing situation proposes a number of strategic interventions.

Power

Some tourism development areas are relatively close to towns on the national grid, but the dispersal of hotels and other facilities in small units outside the towns can make them difficult to serve economically with power from that source. However, as recorded in the MoTWA 2012 Performance Review, MoTWA and Rural Electrification Agency (REA) have jointly prepared a proposal that all protected areas should be served by electricity. REA can respond to any specific proposals of a tourism master plan that indicates where power will be required and what development can be linked and integrated with existing services. REA have a programme of improvement works that will significantly extend the grid network over the next five years. This will enhance the potential availability of on-grid services in many areas, including the national parks.

The use of renewable sources of energy should be encouraged since it is consistent with the natural qualities of the parks and a responsible and sensitive approach to nature and the environment. Even if on-grid power is available, the use of renewable energy

as a part of the power supply strategy for a development should be considered, where appropriate. There may also be opportunities for micro-hydro power generation that could provide a local supply to communities and / or tourism developments within the protected areas.

ICT

At present the availability of mobile phone services and internet access within tourist areas, and the protected areas in particular, is patchy and inconsistent. It is important that all areas that are used by tourists have mobile phone coverage to ensure safety and security and to allow access to information and on-line resources. Providing wi-fi hotspots at key tourist locations such as visitor information centres and attraction sites would also broaden access to the internet.

It is unlikely that the private sector will provide all this additional coverage voluntarily, as the intensity of usage is likely to be relatively low in many parts of the TDAs and therefore commercially unviable. However, the Rural Communications Development Fund (RCDF) can provide a subsidy and, if necessary, compel the telecoms providers to supply the service. This would broaden basic ICT services, increase coverage and provision of broadband connectivity.

Water

The appropriate approach to the water supply of new facilities within the tourism development areas will need to be appraised to assess the most viable solution for each context and location. As part of the infrastructure needs assessment for each area, the current availability of water supply services will need to be defined, the location of existing and proposed development within the area to be estimated; and the scale of infrastructure requirements for those facilities to be assessed. This will allow an appraisal of the viability and comparison of the range of water supply options available, and the preparation of a more detailed infrastructure framework plan that will allow costs to be appraised and, where appropriate, sources of funding to be defined.

Waste Management

Waste management within the protected areas is regulated and controlled by UWA which has guidelines for all forms of waste generation and its management. Elsewhere, generally, the responsibility for waste management lies with urban councils. However, in many cases services are poor or non-existent and only a fraction of the municipal solid waste is collected. Furthermore, some of the waste collected by private contractors is dumped illegally on roadsides or illegal dumpsites. Whilst it is beyond the scope of this study to resolve wider issues of waste management policy and implementation, specific issues related to tourism development areas should clearly highlight the need for proper waste management where appropriate.

Tourist information

Under the TDAs, the provision of signage and establishing Tourist Information Centres (TICs) should be given priority. This will promote local tourist products and encourage tourists to extend their stay in the area. However all signage and TICs should conform to set national minimum standards of presentation and information provision.

It is recommended that:

- Standards and guidelines should be formulated to regulate and monitor the provision of tourist information
- TICs be equipped with maps, travel guides and other tourist literature for sale
- TICs should be allowed to offer booking services and charge a commission

It is important that all areas that are used by tourists have mobile phone coverage to ensure safety and security and to allow access to information and on-line resources.

In general the strategic interventions of utilities provision include

- Completion of an infrastructure needs assessment / scoping study for all existing and proposed, tourism related development within the TDAs in Uganda;
- Liaison with the REA to identify, fund and implement a strategy for providing an on-grid power supply to all tourist areas and facilities, where viable;
- Where viability for on-grid power is lacking, implement alternative approaches such as local, small-scale, hydro schemes, if appropriate, and / or the use of renewable technologies;
- Identification of the need for funding from the RCDF to provide additional ICT infrastructure where it is unviable for the private sector to do so voluntarily;
- Liaison with existing private sector providers to implement the ICT strategy with the funding from the RCDF; and
- Identification, funding and implementation of a sustainable water supply to all tourist sites, as required
- Implementation of existing laws to ensure proper waste management at all tourism related establishments

Although the utility services for tourism related establishments are considered inadequate, a utilities infrastructure assessment has never been carried out to assess the level and magnitude of the need.

The starting point for any decision of the appropriate approach to utility provision within tourism development areas, the master plan recommends for such a study to be carried out in order to appraise;

- The availability, capacity and location of existing power, water, ICT and waste management services, within the area;
- Any planned expansion of services;
- The location of existing and proposed development within the area; and
- The scale of services infrastructure requirements for those facilities.

This will allow an assessment of the viability of the proposals and the preparation of a more detailed infrastructure framework plan that will allow costs to be appraised and, where appropriate, sources of funding to be defined. Where applicable, the environmental impact of the proposals will also need to be taken into account. On overall it is therefore vital that MoTWA continue to engage relevant government ministries via the Tourism Sector Working Group to ensure urgent delivery of these important priority tourist linkages. However, since the overall budgets for the identified infrastructure improvements are insufficient, alternative methods of funding should be explored especially the Public Private Partnerships.

3.4.4 Conservation of Natural and Cultural Heritage

The situational analysis recognises that Uganda has diverse, rich and unique natural and cultural heritage. It however notes that despite a number of measures being put in place the conservation of this heritage is increasingly under threat from increasing human population and competing land uses. The wildlife is faced with challenges of loss of habitat, human-wildlife conflicts, illegal trade in wildlife, limited capacity in research and training in natural heritage monitoring, management and conservation.

The cultural heritage is equally faced with challenges of weak regulatory framework, limited documentation of the heritage resources, inadequate skilled human resource, limited funding, illicit trade in antiques, destruction of urban historic landscapes and buildings among others.

In order to overcome these challenges a number of strategic interventions are proposed by the master plan. They include;

- Enhance the sensitisation and lobby for political support and public good will in protecting heritage resources
- Review and strengthen the regulatory framework and enforce existing conservation laws and regulations
- Increase public awareness and strengthen community conservation initiatives
- Clearly mark and secure all natural and cultural heritage sites such as National Parks and monuments
- Regularly inspect conservation areas/sites to ensure sustainable management of the resources
- Increase financial resources to the conservation agencies
- Build capacity of private sector and local communities to be involved and invest in conservation
- Strengthen implementation of bi/multilateral conservation agreements as a means of promoting of regional conservation
- Strengthen adherence and observation of international conservation conventions and treaties as a means of fighting illegal trade in heritage resources
- Put in place measures to mitigate human-wildlife conflicts such as strengthening institutional capacity to handle conflicts, establishing and maintain barriers along protected areas, review revenue sharing arrangements to human-wildlife conflicts
- Enhance and support conservation research and training through collaborating with universities and other research institutions



To further diversify the product offer, Ugandan tour operators should be encouraged to work with tour operators in generating countries who offer specialist and special interest packages around the world - such as the operators allied with the Association of Independent Tour Operators (AITO) in the UK.

3.4.5 Product development Strategy

3.4.5.1 Introduction

The situational analysis identifies the need to enhance, diversify and develop tourism products in Uganda. The major strategic interventions to be undertaken include:

Increase Product Range

One of the challenges facing the tourism industry in Uganda is the limited range of products. The limitation encourages leisure packages to concentrate highly on the wildlife product. The TMP proposes the encouragement of tour operators to develop packages featuring a greater variety of the tourism assets that Uganda has to offer. Strong exposure of all the different opportunities that exist should be supported by marketing activities and UTB must develop a portfolio of collaterals presenting unique products available in Uganda, including CBT initiatives around Uganda, as well as featuring them on its website. As an incentive tour operators that offer alternative packages should be listed and/or given the opportunity to advertise in both the collaterals and on the website.

To further diversify the product offer, Ugandan tour operators should be encouraged to work with tour operators in generating countries who offer specialist and special interest packages around the world - such as the operators allied with the Association of Independent Tour Operators (AITO) in the UK.

Wildlife Product development

Uganda suffered great reduction of its wildlife due to the effects of war, poaching and human wildlife conflict. In order to quickly restore a healthy wildlife population, the protected areas urgently need a programme of restocking to compliment the natural regeneration and conservation approaches. This should be coupled with measures to promote investment in wildlife product development, increase the range and quality of accommodation in and around protected areas.

The situational analysis highlights the fact that over fifty per cent of wildlife is located outside protected areas. In order to conserve and protect this wildlife, the local governments should be supported and empowered to initiate and attract investment in wildlife enterprises like game ranches, conservatories and zoos. Wildlife education centres should be expanded and developed as regional centres. This will broaden the product offer and enhance the economic utilisation of wildlife.

Cultural Tourism Product development

Uganda is endowed with a unique and varied cultural heritage. The conservation and management of the cultural assets is mainly enshrined in the traditional kingdoms and chiefdoms. In order to tap into this latent resource, the plan proposes the following interventions;

- Government should support and partner with Traditional Kingdoms and Chiefdoms to protect and develop both tangible cultural assets (such as palaces, royal burial grounds) and intangible traditions (such as festivals, music, dance and food) into viable tourism products
- Government should support and promote the development of cultural centres that package and expose the cultural heritage and entertainment of the regions

- Museum development and monument conservation should be enhanced and supported to identify, collect and diversify the display of the country's unique history and cultural heritage
- Government should support and promote the development of private and community museums to compliment the national and regional collections
- The faith based organisations should be encouraged and supported to protect the churches and historical artefacts, package and promote them for tourism.

Development of the MICE industry

In order to improve the performance of the MICE sector, the Master Plan recommends that government puts in place a MICE Development Plan, which would include establishing Convention Visitor Bureaus or Destination Marketing Organisations at city, municipal and regional levels, supported by tourist information centres.

Government should support and encourage the development of larger MICE Convention centres and venues outside the Central Region to spread business around the country and the study recommends creating a MICE development fund in partnership with the private sector. Recognised trade associations and lobby groups for MICE should be set up and strengthened to promote the interests of the sector and to create a forum for discussion, incubation and sharing of creative ideas.

Support skills improvement in tourism product innovation and creativity

The tourism industry has been facing a challenge of lacking innovation and creativity in the different products offered. The Master plan's strategic intervention to this challenge is suggested through curriculum review in all tourism training institution. Details to this are explained in the human resource development strategic intervention section.

3.4.5.2 Product Development Strategy

In order to attain the above intervention, a product development strategy needs to be integrated into a hierarchical framework that corresponds to the administrative structures that will oversee its implementation. A three-tier structure has been formulated to underpin the Master Plan recommendations, as follows;

- The Structure Plan; the structure plan is the physical expression of the tourism development strategy, which is phased in three tranches between 2014 and 2023. The Structure Plan identifies six Tourism Development Areas (TDAs), which form the core areas for development through the Master Plan period. Areas and actions indicated on the Structure Plan should be related to elements of National Physical and Infrastructure Plans.
- Area Plans; correspond to District, Urban or Local Physical Plans and illustrate the detailed planning principles and content-specific tourist development zones within TDAs to a greater level of detail than the strategic level Structure Plan.
- Demonstration Projects; are more detailed conceptual proposals for specific development projects, down to the level of individual buildings or complexes. The examples set out demonstrate principles of site planning, development intensity and building design which should be incorporated into Local Development Control Plans.

Product development requires a shift from the old development approaches to new ones that are guided by research and creativity.

Key Strategic Objectives

The key strategic objectives guiding product development strategy are to improve and diversify the product base, providing the visitor with a greater and better choice of products and activities, and increase the visitor's average length of stay and expenditure. In order to build a strong and sustained product development base, the Master Plan proposes a three phase product development approach that focuses on consolidation, expansion and diversification and sustained growth: The three phases are outlined below:

Phase 1, Years 1 – 3:

Consolidation

- Consolidating and strengthening the products in established Tourism Development Areas
- Improving access and circuits. Implement regional tourism hubs and local tour circuits
- Strengthening and expanding core source markets.

Phase 2, Years 4 – 6:

Expansion and Diversification

- Broadening tourism clusters in core TDAs.
- Investing in new products in core TDAs: develop Kampala Exhibition and Conference Centre
- Creating new tourist routes: initiate Ssesse Islands development at Kalangala
- Opening new emerging markets: develop Nile Adventure Trail

Phase 3, Years 7 – 10:

Sustained Growth

- Creating new TDAs: develop North-Eastern TDA
- Expanding the product range, expand Kampala Tour, extend Kampala Exhibition and Conference Centre

3.4.5.3 Tourism Development Areas and flagship projects

Building on the product development phased approach, the Master Plan identified six Tourism Development Areas (TDAs) distributed across the country. In order to support product development and utilisation, the TDA structural plan identifies: regional tourism hubs (that will have a regional tourism offices); radial road linkages (from the capital, which serve as the primary means of access to each of the TDAs) and lateral tourism routes (to interlink the TDAs and considerably reduce travel time and costs). The plan proposes unique tourism products that can be developed in each TDA and conceptualises some flagship projects as explained below.

(a) The Central TDA – the Cultural Heartland

Already established as a tourist destination, the Central TDA is the national capital, and

Entebbe the national air gateway and it receives the overwhelming majority foreign and domestic tourists. This region has a number of tourism resources and attractions which include: cultural and historic sites (Kasubi Tombs, National Museum, monuments); and nature base attractions (Ssesse Islands, Ngamba Island Chimpanzee Sanctuary, Mabira Forest Reserve). The central TDA also has the largest proportion of tourism facilities in the country such as hotel rooms, restaurants and entertainment centres.

In order to diversify the present product offer the Master Plan proposes the central TDA to be profiled and developed mainly for business and conference tourism. In line with this the Kampala Tourism Circuit and the Kampala Conference and Exhibition Centre flagship projects are conceptualised

(i) Kampala Tourism Circuit:

The focus of this flagship project is to identify a core tourism circuit within Kampala, linking together the key tourist attractions and offer a visitor a chance to experience the rich historical and cultural heritage of the city. This project will help raise the tourism profile of the capital, offer new opportunities for tourism-related business opportunities along its route and distribute tourist spending around the city.

This illustrative circuit (Figure 3.7) is confined to a number of well-known attractions and institutions around the city for the initial phase. It can later be expanded to include other sites further afield, such as the Namugongo Martyrs' shrine and Entebbe (UWEC and Botanical Gardens) among others. Other circuits can also be developed, based on themes such as Kampala by night, shopping, community life etc.

In order to diversify the present product offer the Master Plan proposes the central TDA to be profiled and developed mainly for business and conference tourism.

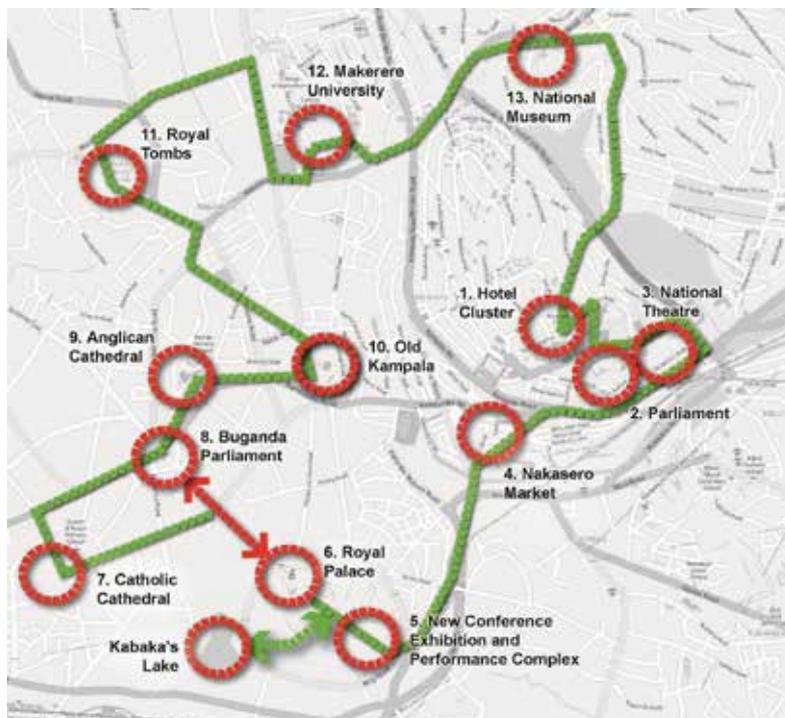


Figure: 3. 7 Proposed Kampala Tourism Circuit

(ii) Kampala Conference and Exhibition Centre

The Master plan proposes the development of a modern multipurpose and integrated conference and exhibition complex (Figure 3.8) serviced by the existing business hotel stock in Kampala and Entebbe. The proposed Conference Centre is the centrepiece of the proposed complex that should be designed to the highest architectural standards. The complex is proposed to have a Convention Centre and a main hall auditorium with a capacity of 2000 delegates each, several break-out meeting rooms, catering facilities and public spaces.

The complex will also have an exhibition centre will comprise two halls, each of about 5,000 m² in area, and capable of internal subdivision to a minimum venue area of 2,500 m² for minor events such as trade product launches. With a total available area of 10,000 m² the Kampala centre will allow the city to host major international events. The plan proposes to have a large open air performance arena (approximate capacity of 9,000 spectators) that will be developed alongside the proposed exhibition hall and will share service facilities with the exhibition hall, including ticketing areas, toilets, and cargo handing areas.

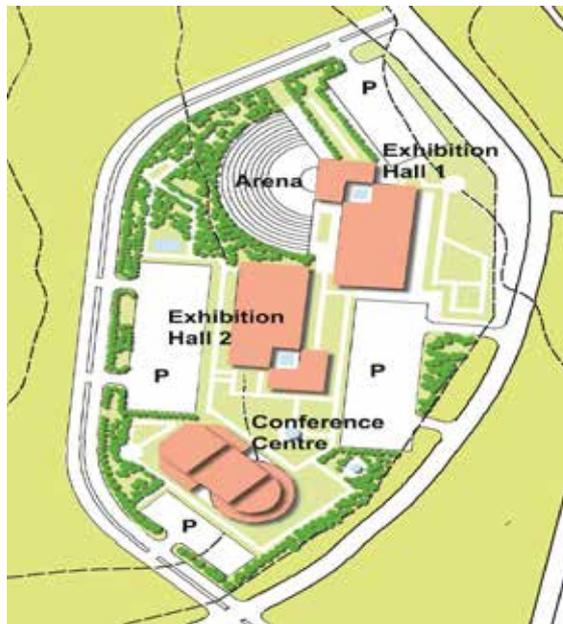


Figure 3. 8 Kampala Conference and Exhibition Complex, Concept Plan

(b) The South Eastern TDA – Nile and Adventure

The South-Eastern Tourism Development Area extends from the east bank of the River Nile to the Mount Elgon National Park on the Kenyan border. The two principal attractions of the TDA are Mount Elgon National Park and the Source of the Nile at Jinja. Other significant attractions in the TDA include the Tororo Rock, Sipi Falls and the largely unexploited potential of Lake Victoria as a tourism resource. Tourist activities including kayaking, horse riding, white water rafting, and bungee jumping are mainly clustered around Jinja town and tourism resources to the east around Mount Elgon remain largely unexploited.

To enhance the product offer the Master plan proposes a number of strategic interventions (as illustrated in Figure 3.11) – they include: development of Masindi as a regional tourism hub; upgrade roads leading to the park; construct a new Visitor Centre at Paraa, establishment of new budget accommodation (including campsites) at Masindi and Pakwach; initiate cruise Services on Lake Albert and up grading the visitor experience at the Murchison Falls - for instance by construction a pedestrian bridge over the Falls.



Figure: 3. 11 The North-Western TDA proposed developments

(e) Western TDA - Lakes and Mountains of the Moon

The Western Tourism Development Area has an extensive Protected Areas network that includes Queen Elizabeth National Park (and the adjoining Kyambura and Kigezi Wildlife Reserves) Kibale National Park, Rwenzori Mountains National Park and the Semliki National Park. The TDA also covers Lakes Albert, George and Edward, as well as Africa’s highest mountain range, the Rwenzori, also known as the Mountains of the Moon. Fort Portal is identified as the regional tourism hub of the TDA.

The overarching objective of the Master Plan is to reinforce the position of the Western TDA as a major tourism destination in Uganda, primarily through better exploitation of its Protected Areas and lakes by offering exceptional wildlife and water based products. Attention should be paid to: the development of the Rwenzori National Park, for its trekking and mountain climbing potential; cruise tourism on Kazinga channel, Lakes George and Edward; exceptional game viewing in Queen Elizabeth National Park

(including night treks), primate tracking in Kibale National Park and ensure adequate provision of interpretive facilities and visitor Information centres. More so there is need to broaden and diversify the tourism product, by integrating community-based tourism into the product offer at a range of sites within easy reach of the main tourist routes.

In order to fully exploit the product potential of the region, the Master Plan proposes a number of interventions in the TDA (as illustrated in Figure 3.12) which include; establishment of interpretation centre and development of accommodation facilities in Fort Portal, improve on facilities at the hot springs in Semliki National Park, establishment of mountain sports centre and budget accommodation in Rwenzori National Park, introduction of electric/solar powered boat cruises on Kazinga Channel and upgrading the air field in Kasese.



Figure: 3. 12 The Western Tourism Development Area development proposals

(f) South Western TDA – the Gorilla Forests and Pastoral Areas

The South-Western TDA is centred on the town of Kabale (as the regional tourism hub) and is the location of Uganda’s most iconic tourist attraction, the Mountain Gorilla. The region has a well-established tourism sector based primarily on Gorilla Tracking, which attracts a large proportion of high value foreign tourists. The TDA contains an impressive range of attractions, including the National Parks of Bwindi Impenetrable Forest, Mgahinga Gorilla and Lake Mburo. In addition the region contains the scenic Lake Bunyoni, the Kitagata Hot Springs and Igongo Cultural

The Master Plan identifies the need is to diversify the tourism product and reduce the dependence on wildlife based tourism especially gorilla tracking in this region.

Particular attention should be paid to the potential of new products such as health and well-being spas (at Kitagata Hot springs), adventure and water based sports (Lakes Bunyonyi and Mutanda), birding in Bwindi and Mgahinga and cultural and ecotourism tourism products (among the Batwa and other communities).

3.4.6 Human Resource Development

3.4.6.1 Introduction

Availability of an appropriate level of human resource is imperative in the development of the tourism industry. Thus adopting a new strategic approach to tourism human resources development will have the potential to raise the quality of tourism product and service delivery in Uganda as well as raising the standard and competitiveness of the tourism sector. This will further contribute to poverty reduction efforts through strengthened inclusion and more equitable access to tourism sector employment and businesses by the poor.

The strategy is based on building strong public-private partnerships and strengthening cooperation between the tourism education/training sector and the tourism industry. It is believed that Investment in human resource capacity building will benefit the tourism sector (both private and public) through improvements in the quality and range of tourism products and services that will, in turn, help increase visitor arrivals and spending whilst enhancing visitor experience and satisfaction.

The new strategic approach is formulated at the backdrop of unskilled human resource providers leading to low quality tourism products and service delivery. This has led to low competitiveness within the region thus a need for a new strategy. The new human resource development strategy (Figure 3.13) focuses on three areas simultaneously:

It is believed that Investment in human resource capacity building will benefit the tourism sector (both private and public) through improvements in the quality and range of tourism products and services that will, in turn, help increase visitor arrivals and spending whilst enhancing visitor experience and satisfaction.



Figure: 3. 13 Human resource development strategy

The strategy will use a phased approach to strengthen the tourism and hospitality skills provision over the 10-year period of the Master Plan. The strategy will be guided by the following key objectives:

- Enhanced public sector capacity to lead tourism sector development;
- Enhanced private sector capacity to develop and deliver quality tourism products and services;
- A world-class hospitality training institution with a world-class training hotel;

The Tourism HRD Advisory Committee will spearhead a long-term national awareness campaign to address three distinct set of audiences: the general public; policy makers; academia and students

- International standard tourism and hospitality education and training institutions and programmes;
- Mobile and satellite training centres in the Tourism Destination Areas for international standard continuous professional development;
- Positive image and strong awareness of tourism sector employment opportunities;
- Employable and motivated graduates to join the tourism labour force; and
- Good working conditions in tourism to attract and retain talent in the sector.

To fulfil these objectives, the Tourism Master Plan proposes the following interventions:

3.4.6.2 Coordination of Tourism Human Resources Development (HRD) Activities

Tourism human resources development efforts will be coordinated by the HRD Advisory Committee. The HRD Advisory Committee will include representatives from the Ministry of Tourism Wildlife and Antiquities, Ministry of Education and Sports, National Council for Higher Education (NCHE), the Uganda Hotels, Food, Tourism and Allied Workers' Union, BTVET, representatives of tourism education and training institutions and industry sector representatives such as hoteliers, tour operators etc. NCHE will retain its responsibility for institutions of Higher Education and their programmes and will work in close collaboration with the HRD Advisory Committee at the Uganda Tourist Board.

The HRD Advisory Committee will:

- Undertake continuous assessment of the manpower training needs of the industry in terms of numbers and skills required;
- Organise and, where appropriate arrange for the provision, implementation and certification of training programmes for those employed in the industry and for new entrants to the industry;
- Implement bilateral exchange training programmes in tourism; and
- Liaise with the universities, schools and colleges and other relevant institutions and the industry on the nature and type of training programs and courses with a view to advising on specific manpower needs of the industry.

Activities and responsibilities of the HRD Advisory Committee:

- Identify Industry Training Needs;
- Plan, Implement Promote Actions to Meet Industry Needs;
- Curriculum Development; and
- Increase Awareness of Career Opportunities.

3.4.6.3 Public Tourism Awareness Campaigns

The Tourism HRD Advisory Committee will spearhead a long-term national awareness campaign to address three distinct set of audiences: the general public; policy makers; academia and students.

The objective of the campaigns is to popularise and change the negative attitude towards the tourism and hospitality sector by raising awareness of tourism as an activity and as a sector for employment and business creation.

To the general public, the awareness campaigns will utilise multiple broadcasting platforms like; television, radio, newspapers, posters and billboards. The campaign will create awareness about the tourism enterprise and showcase successful role models in the sector. The programme for the policy makers will focus on empowering them with tourism information especially highlighting the inter relationship of tourism and other sectors. The campaigns will also highlight the importance of a conducive policy framework in attracting and facilitating investment in the sector.

The programmes for the academia and student category will focus on raising awareness of the sectors' importance and potential as a rewarding career path to attract students, and promoting a culture of domestic travel among the youth. MoTWA will work closely with the Ministry of Education and Sports to ensure aspects of tourism are appropriately integrated in the curriculum at all levels of schooling.

3.4.6.4 Concept for HTTI

To enhance the human resource in the tourism sector, the HTTI will be elevated into a Centre of Excellence through investments in its management, physical infrastructure, curriculum and staff development.

The re-development of HTTI will be achieved through a major funding support obtained from the World Bank. This provides a timely opportunity to redevelop HTTI into a flagship institute and a Centre of Excellence in Hospitality and Tourism training. This will act as a catalyst for capacity building for the Ugandan tourism sector and spearhead skills development.

For HTTI to reach its full potential as a Centre of Excellence, it is vital that the academic institute be equipped with international standard training facilities. This to include a training and demonstration kitchen, training restaurant, library, computer laboratory equipped with hotel and airline reservation systems and language training facilities. Student will receive their first practical training at the institute before moving on to the more advanced practical training at the application hotel.

The transformation of HTTI into a centre of excellence will require the engagement of an international management institution to introduce the required standards. The Ministry will explore multiple models of partnership or contracting management that meets the international standard for the institute. The HTTI training programme will be restructured in line with the Quality Assurance Framework of the National Council of Higher Education to provide modular programmes that progress from certificate, diploma to degree levels with an internship programme (Table 3.2).

Table: 3. 2 Sample Programme Structure for HTTI

Certificate	Diploma	Paid Internship	Bachelor	Graduate Placement
1 year	1 year	5-6 months	1 year	Management training programme or full time employment with career guidance from HTTI

In addition to full-time academic programmes, HTTI will also provide short refresher professional development courses to tourism sector employees. HTTI will develop these in close collaboration with the UTB and the HRD Advisory Committee.

The professional development programme will include an initial set of ten short courses. Two of these will be generic skills in hospitality and tourism and eight courses will be offered to develop functional skills in food and beverage production and service, front office, housekeeping, tour operation and travel agencies.

As the programme develops, further modules will be added to the portfolio. The length of each course will be 2-5 days. HTTI will also develop basic distance learning refresher courses using distance learning computer platforms, teaching videos. The practical element and examinations for these courses will be conducted at the Mobile Training Centres and later at the Satellite Training Centres.

3.4.6.5 Concept for Satellite Training Centres

The Master Plan proposes formation of Satellite Training Centres that will be managed by HTTI and act as HTTI's regional centres. The Centres will also serve as feeder schools for HTTI. The HRD Advisory Committee will provide continuous input in terms of industry needs and developments. The purpose of the Satellite Training Centres will be to foster continuous professional development of tourism sector employees. A network of Satellite Training Centres will be set up in the Tourism Development Areas in Phase II of the Master Plan. Each Satellite Training Centre (Figure 3.14) should contain a classroom a training kitchen, a training restaurant, a demonstration guest room, a demonstration laundry, a resource centre (library and computer lab) and an administration centre. The Satellite Training Centres will deliver refresher short courses with a duration of 2-5 days to a maximum of 12 weeks in areas of food preparation and service, front office, housekeeping, travel agency/tour operation and tour guiding.

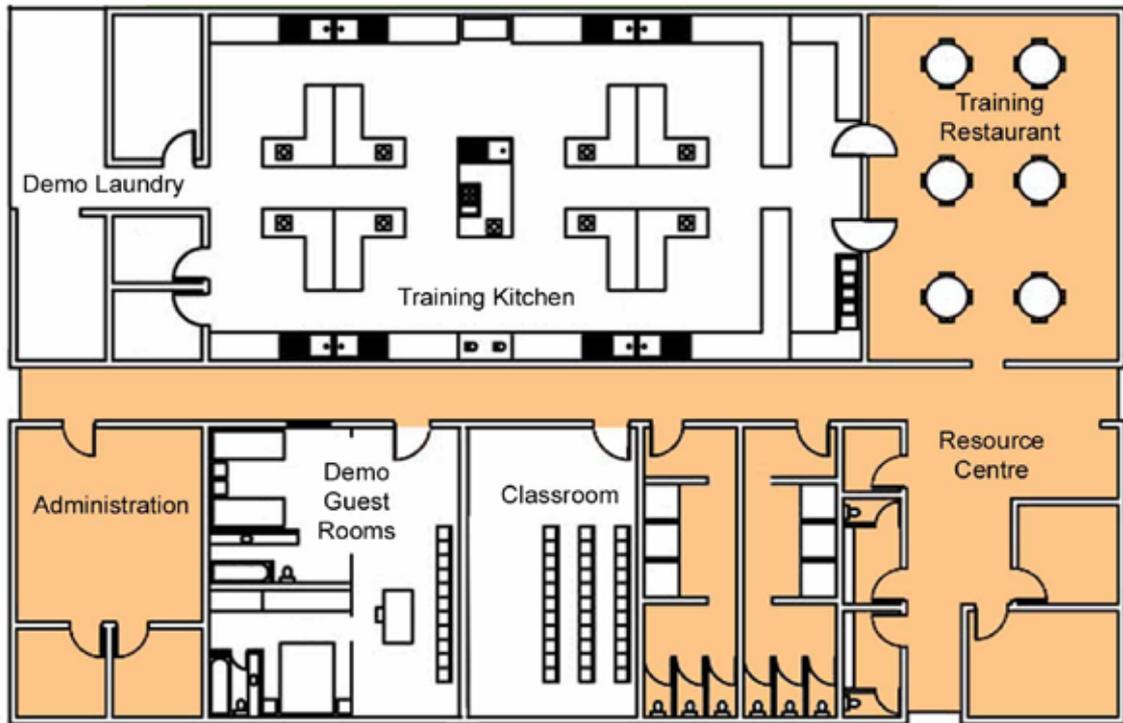


Figure: 3. 14 Satellite Training Centre

3.4.6.6 Concept for Mobile Training Centres

In Phase I of the Master Plan, Mobile Training Centres will be set up in the Tourism Development Areas by HTTI. The Centres will be set up at existing hotels for the duration of the training. A mobile training centre will operate for a period of 2 weeks at a time and then moves to another Tourism Development Area.

Hotels with international standard kitchen facilities and a meeting room will be approached to serve as the temporary basis for the Mobile Training Centre. Whenever possible, off season and low season periods will be chosen for the operation. The incentive for hotel owners to offer the premises for the Mobile Training Centres will be free training for their staff on the premises (numbers to be set according to local conditions) and a nominal fee for renting the premises to cover the arising operational costs. The running of the Mobile Training Units will be covered from Enhanced Integrated Framework Funding.

Refresher courses with a duration of 1-5 days will be offered in the following areas:

- Customer service;
- Service recovery;
- Tourism marketing and promotion;
- Professional kitchen techniques;
- Food hygiene and safety;

- Wine and beverage;
- Professional pastry techniques;
- Restaurant management and control;
- Kitchen management and control;
- International gastronomy;
- Front office operations;
- Travel itinerary planning;
- Travel package costing; and
- Tour guiding.

3.4.6.7 Curriculum Development and Quality Assurance

The ultimate responsibility for the quality of programme design and delivery will lie with the individual public and private sector education and training institutions. Institutions will receive increased support in terms of guidelines while quality assurance mechanism will be strengthened. In order to strengthen the tourism curriculum, the Ministry of Tourism, Wildlife and Antiquities in collaboration with the National Council for Higher Education (NCHE) will set-up a Tourism Curriculum Review Committee to conduct a Tourism Curriculum Review in both public and private institutions to review and benchmark the curriculum against international best practices.

The Tourism Curriculum Review Committee will include experts from:

- Ministry of Tourism, Wildlife and Antiquities
- HRD Advisory Committee
- National Council for Higher Education
- National Curriculum Development Centre
- BTVET
- UWA
- UWEC
- Tourism private sector employers
- National tourism subject experts
- International tourism subject experts

The Tourism Curriculum Review will include a mapping of the existing curriculum, preparation of Subject Benchmark Statements. On the basis of the review, the Tourism Curriculum Committee will propose necessary curriculum changes and developments. The Subject Benchmark Statements will serve as a source of reference for higher education institutions when designing new programmes of study in tourism and will guide them when setting the learning outcomes associated with the programmes.

It will also provide guidelines on teaching, learning and assessment and on award titles. The Subject benchmarks will not be intended as a detailed prescription of curriculum but rather as a vehicle to stimulate innovation and develop comparable standards in programme design across both public and private institutions within an agreed overall framework. The length of programmes will be reviewed by the Curriculum Review Committee to ensure that programme length is fully in line with curriculum needs.

Curriculum development will include new innovative programmes that address local and international industry needs and are attractive to local populations. Curriculum development will include the strengthening of foreign language training in languages of key source markets. In line with the marketing strategy, emphasis will be placed on providing language training for the following languages:

In Phase One: English, Swahili, French and German while in Phase Two: Chinese, Italian, Spanish, Dutch, Scandinavian, Russian, Japanese and Hindi languages should be taught.

Public and private education and training institutions will be required to have minimum standard practical training facilities. This will include (as appropriate) training kitchens, demonstration guestrooms, hotel and airline reservation systems. Institutions will also be required to stock at least minimum standard of teaching and learning material, including textbooks and at university level access to on-line databases and journals will be provided. Institutions offering Bachelor degrees and those engaged in research activities will subscribe to the UNWTO E-library, granting online access for faculty and students to UNWTO publications.

Programme development at institutional level is to incorporate the latest teaching and learning methodologies and technologies, including the use of social media and E-learning platforms and technologies

Institutions offering Bachelor degrees will be expected to develop their research activities through the establishment of research centres, collaborative research programmes and funded research projects. The research centres will also be involved in industry research such as to support the market research activities of the Uganda Tourist Board. Applied student dissertations will be also introduced whereby high calibre students will be given the opportunity to conduct industry research for tourism sector companies and the Uganda Tourist Board as part of their dissertation. Scholarships for senior academic staff to conduct PhD level research at leading overseas universities in the field of tourism and hospitality will also be provided.

Tourism Research Centres will be set up at Makerere University and Makerere University Business School. The Centre will act as a driver of academic and industry related tourism research in Uganda. The Centres will also take part in international collaborative research projects. The centre will be collaborate with the Uganda Wildlife Training Institute on wildlife related tourism research projects.

The National Council for Higher Education will be proactive in inspecting tourism programmes and institutions and no institution will be allowed to deliver tourism related programmes without National Council for Higher Education accreditation and Uganda Tourist Board registration.

3.4.6.8 Tourism Education – Industry Partnership

Partnership between the education training institutions and industry will be strengthened through a number of joint activities. This will improve information flow between the two sectors and will build a strong base for cooperation.

The partnership will be strengthened through the following measures:

- Tourism education and training institutions will set-up Industry Advisory Boards. Membership of Boards will include leading industry practitioners. The Board will provide regular input into curriculum development;

The Tourism Master Plan proposes that Makerere University, Makerere University Business School and HTTI be supported to become the first institutions to seek UNWTO, TedQual Certification.

- Tourism education and training institutions will invite industry practitioners to give guest lectures and to co-assess student presentations and end of internship reports;
- Tourism education and training institutions will set up Alumni Associations and involve alumni through joint events, student sponsorships, student prizes etc.;
- Tourism education and training institutions and industry will work closely together to set up strong, structured and supervised internship programmes and structured management training programmes; and
- Tourism education and training institutions will regularly survey employers regarding market trends and student employability.

3.4.6.9 Student Employability, Internship and Graduate Training Programmes

A key priority for tourism education and training is to ensure student employability. This can be achieved through an effective matching of student career objectives with programme aims (career orientation, information regarding careers in the tourism sector, setting realistic expectations), strengthened education-industry links, structured management training programmes and internship arrangements and improved student work destination monitoring. Student work destinations will be monitored by all tourism education and training institutions. Survey data collection at 6 and 12 months after graduation is to be adopted as a norm.

There is a need for increased emphasis on practical skills, attitudes and work ethics. The Master Plan proposes that all undergraduate courses are to include a minimum of five month; preferably a full year structured and supervised internship (Appendix 6). This should be run in a systemised and highly controlled and monitored way to maximise student learning and development and strengthen student employability.

3.4.6.10 Programme Internationalisation

The Master Plan proposes the following strategies to raise tourism training to international standards

• Lecturers Study Tours

Programme visits to renowned tourism and hospitality schools and universities will be organised for lecturers. These visits will widen their perspective and can lead to further exchanges (of information, materials, lecturers, students) and to mentoring opportunities. The visit should include technical visits to key tourism attractions which can later be used as case studies.

• Distinguished Guest Professor Programme

Institutions will be encouraged to invite distinguished Guest Professors to bring a new source of knowledge to tourism and hospitality lecturers and students. Distinguished Guest Professors will be invited for periods of one week to one semester. Such a relationship will also involve temporary staff mobility, whereby Ugandan lecturers will spend a semester abroad to teach and conduct research.

- **Mentorship Programmes and Twinning Projects**

These will be sought with leading international universities in specialized in tourism and hospitality from the United States of America, the United Kingdom and South Africa.

- **UNWTO.TedQual Certification**

Certification brings recognition, credibility, and entrance into a network of institutions that have proved their excellence. The Tourism Master Plan proposes that Makerere University, Makerere University Business School and HTTI be supported to become the first institutions to seek UNWTO.TedQual Certification.

The UNWTO.TedQual Certification System is a certification of a voluntary nature that seeks to facilitate the continual improvement of tourism education, training and research programmes through the definition of a set of minimum standards of quality for tourism education.

To this end, the system takes into consideration five areas of analysis that evaluate internal and external aspects of the programme: the coherence of the plan of studies; infrastructure and pedagogical support; policies, tools and support mechanisms for administrative management; the existence of transparent mechanisms for the selection of the faculty and favourable conditions for their professional development; and the relevance of the content of the programme of studies with respect to the needs of the tourism sector.

3.4.6.11 Continuous Professional Development

Continuous Professional Development to the tourism sector will be led and overseen by the HRD Advisory Committee. The strategies will address;

(a) Private Sector Capacity Building: In-House and External Training

Private sector capacity building will be promoted and facilitated through the delivery of external training courses through the Mobile Training Centres (Phase I of Master Plan) and Satellite Training Centres (Phase II of Master Plan) to address the capacity building priorities (Figure 3.15). In order to strengthen the training culture in the tourism sector, in-house training by employers will be subsidised and supported from the Tourism Development Levy. The dual education system will be piloted for hospitality and tourism training and if successful rolled out. Continuous Professional Development will be focused to close the skills gaps as needed.

<p style="text-align: center;">Hospitality Sector</p>	<p style="text-align: center;">Tour Operation, Travel Agencies and Tour Guiding</p>
<ul style="list-style-type: none"> • international standard food preparation • food hygiene • practical hospitality training skills • computer skills and computer reservation systems • customer service, customer relations, service recovery • supervisory skills • managerial skills • sales and marketing • contract negotiation • yield management • cost control and pricing • quality assurance • human resource management 	<ul style="list-style-type: none"> • tour guiding • computer skills and computer reservation systems • product knowledge • customer service, customer relations, service recovery • sales and marketing • contract negotiation • yield management • packaging • itinerary planning • pricing • quality assurance • human resource management
<p style="text-align: center;">Cultural Sector and Wildlife</p>	<p style="text-align: center;">C-BTEs</p>
<ul style="list-style-type: none"> • conservation • interpretation • customer service, customer relations, service recovery • sales and marketing • contract negotiation • yield management • pricing • quality assurance • human resource management 	<ul style="list-style-type: none"> • craft design and marketing • business management • food hygiene • sales and marketing • contract negotiation • yield management • cost control and pricing

Figure: 3. 15 Private Sector Capacity Building Priorities

(b) SME and Entrepreneurial Skills

Given the dominance of small businesses in the Ugandan tourism sector, special attention will be given to the strengthening of capacity building provision in business development and entrepreneurial skills.

This will include training in business plan writing, business management skills such as budgeting, business financing and human resources management and development. A particular focus will be placed on enhancing the product development and marketing skills in tourism and hospitality enterprises to ensure that they are able to reach the desired target markets and provide them with appropriate products. Regular short courses will be organised through the relevant associations.

(c) Public Sector Capacity Building

In order to build the human resources capacity of the Ministry of Tourism, Wildlife and Antiquities, the Uganda Tourist Board and the Uganda Wildlife Authority, the following steps will be taken:

- Unfilled positions will be filled with appropriately qualified and experienced staff;
- A Capacity Building Programme will include:
 - Technical visits to tourism development areas and key tourist attractions in Uganda and abroad to increase exposure to international best practices;
 - Scholarships will be awarded to staff to study for one year Masters Programme in Tourism Planning, Tourism Marketing, Sustainable Tourism, Tourism Management, Events Management and Wildlife Management and Conservation, Recreation and Leisure Management at leading international universities to increase technical capability;
 - Tailor made short courses to be delivered to staff to close skills gaps in priority areas

(d) Tourism Educator Capacity Building

- **Tourism Educators Practicum**

MoTWA will organise ‘Tourism Educators Practicum’ for public and private sector tourism education institutions staff to be trained on latest teaching and learning methodologies, including the use of case studies, technical visits and practical training. Strengthening practical training is particularly required to include culinary skills, tour packaging, itinerary planning and budgeting among others.

- **Scholarship Programme for Faculty**

A scholarship programme will be set up for faculty members to provide tuition fee and subsistence while studying at overseas institutions for Masters and PhD level qualifications.

Given the dominance of small businesses in the Ugandan tourism sector, special attention will be given to the strengthening of capacity building provision in business development and entrepreneurial skills.

3.4.6.12 Working Conditions

Working conditions will be improved in line with the ILO Decent Work Agenda. To this end:

- the Uganda Hotels, Food, Tourism & Allied Workers Union will be included in all consultations regarding tourism human resources issues;
- the Ministry of Tourism, Wildlife and Antiquities will work closely with the UTB HRD Advisory Committee and the Uganda Hotels, Food, Tourism & Allied Workers Union to strengthen labour law enforcement in the tourism sector.;
- capacity building workshops for Human Resources Managers of tourism businesses will be organised by the HRD Advisory Committee to disseminate best practices in human resource management and productivity management in the tourism sector;
- career progression opportunities for tourism employees will be developed through:
 - strengthened continuous professional development activities;
 - the strengthening of internship programmes;
 - the promotion of management training programmes.

A dedicated Research Unit that will be set up within MoTWA will work in close cooperation with the HRD Advisory Committee and the Uganda Bureau of Statistics to collect data and engage in research that will inform planning for human resource development in the tourism sector.

3.4.6.13 Monitoring and Evaluation

The implementation of the human resource development activities needs to be monitored and evaluated on an annual basis. Its implementation should be reviewed and adjusted annually on the basis of progress and with regard to the development stages of the tourism sector. A dedicated Research Unit that will be set up within MoTWA will work in close cooperation with the HRD Advisory Committee and the Uganda Bureau of Statistics to collect data and engage in research that will inform planning for human resource development in the tourism sector.

On overall the tourism education and training needs to: be significantly strengthened to support current educational and training institutions to fully utilize their capacities; improve retention of tourism graduates in the sector (through improved career guidance, structured management training and internship programmes); develop new programmes; and provide more continuous professional development courses. Efforts also need to be made to enable people from disadvantaged communities to access new employment opportunities within the sector. Above all, the tourism human resources in the country should be sufficiently skilled and motivated to plan, manage and deliver competitive and sustainable tourism products and services.

3.4.7 Tourism Financing and Investment

Although the government has put in place, an enabling investment environment and incentives there is still inadequate investment in tourism sector. The situational analysis notes that the costs of doing business are still high, sources of financing are still limited and the strategies put in place have not been sufficiently pro-active and therefore a more concerted and targeted programme of financing and investment promotion needs to be devised and implemented.

The following interventions have been identified by the master plan to enhance tourism financing and investment

3.4.7.1 Implement Tourism Development levy

The Tourism Development Levy (TDL) is one of the interventions that would help bridge the funding and investment gap that tourism suffers by providing a secure basis for longer-term planning and development of the sector.

The TDL should be implemented as soon as the most cost-effective collection mechanism has been agreed and the exact scope of the levy determined. It is proposed that the levy be phased, starting with Kampala, Entebbe, Jinja and protected areas followed by regional municipalities and the whole country. As this revenue will be available annually, eventually the funding gap will be completely eliminated, especially with increased tourism business in Uganda.

3.4.7.2 Improve the business environment

The role of government in encouraging and supporting the growth of the private sector in a modern economy is to create an environment in which private enterprise can invest, generate employment and contribute to achieving national development goals. In Uganda the government has proposed a number of reforms to improve its business environment (Table 18) by simplifying documentation procedures, reduce time and cost of starting and managing a business. However, much work still remains to be done to enhance Uganda's competitiveness especially in areas applicable to the tourism sector

such as: streamlining multiple licenses; enforcement of standards to ensure quality service provision; establish mechanisms to weed out unfair pricing; and streamlining tourism registration services with UTB and the local governments.

Table: 3. 3 Areas of Focus for Uganda to Improve the Business Environment

Indicator	Area of Focus
Starting a Business	<ul style="list-style-type: none"> • URA to ask banks to set-up a teller counter at the UGRS • Expedite and make the issuance of business licence more efficient • Reduce time required to register with the National Social Security Fund • Make the company seal optional
Dealing with Construction Permits	<ul style="list-style-type: none"> • Reduce the time to obtain the clearance for architectural drawings • Eliminate the submission of construction drawings to the Land Registry for clearance • Reduce the fees to obtain the clearance for architectural drawings • Reduce the cost and time to connect to utilities
Getting Electricity	<ul style="list-style-type: none"> • Reduce procedures and costs of getting electricity
Registering Property	<ul style="list-style-type: none"> • Reduce the time necessary to obtain a property consent form • URA to ask banks to set-up a teller counter at the Land Office • Introduce standardised property transfer documents • Reduce the time to conduct a property valuation • Replace the %age based fee structure by a flat fee structure • Unify and computerise property records at the Land Registry
Protecting Investors	<ul style="list-style-type: none"> • Expand disclosure of related party transactions • Increase shareholders' liability • Increase shareholders' access to documents and evidence
Enforcing Contracts	<ul style="list-style-type: none"> • Implement the Small Claims Procedures initiative that will fast-track dispute resolutions of UGX 10 million and below that affect SMEs mainly • Restrict adjournments and limit delays • Publish Courts activity reports • Increase the efficiency of the Chief Magistrates Court and designate magistrates form civil or commercial disputes • Introduce performance management for judges and magistrates • Introduce court administrators • Introduce e-filing at the Commercial Court

Source: Information Paper 001/12 – MFPED

3.4.7.3 Redefining Incentives

Uganda has a number of incentives it has established to attract investment in the tourism sector in particular and the economy in general. Alongside these incentives, a number of specific investment opportunities in the tourism sector have been identified by UIA, UTB and UWA among others. However, these actions have not significantly boosted investment, implying that there are barriers to investment that need to be identified and addressed accordingly.

The most important factor in stimulating investment flows is to give investors the degree of confidence and reassurance they are looking for i.e. that their investment is secure and they will gain their projected return on investment within the anticipated timeframe.

Therefore a far-reaching review of the current regime of tourism investment incentives needs to be carried out. The sector needs to conduct a comprehensive tourism investment assessment survey to identify:

- Investment needs, in terms of tourism products and services, locations and indicative capital expenditure required and the return on investment (payback periods);
- Obstacles to investment flows (national and international) real and perceived by potential investors inside and outside the country;
- Comparison of tourism investment incentives in the region and selected countries outside the region as examples of best practice;
- Comparison of tourism investment incentives in the region and selected countries outside the region as examples of best practice; and
- Key investment sources inside and outside Uganda, including sovereign wealth funds

Based on the findings and recommendations of this survey, the current regime of investment incentives and promotional practices and methodologies should be revised and augmented as found necessary.

3.4.7.4 Stimulating Investment

Uganda possesses huge potential, in terms of its rich wildlife and natural environment, its culture, climate and human capital, the challenge remains attracting investment to convert that potential into real opportunity in the form of a mix of tourism and tourism-related products.

The most important factor in stimulating investment flows is to give investors the degree of confidence and reassurance they are looking for i.e. that their investment is secure and they will gain their projected return on investment within the anticipated timeframe. Investor confidence is essential. Nevertheless a number of investment promotion activities can be deployed by UIA and UTB in the short and medium-terms to generate stronger investment into the tourism sector. These include:

Investment Forums: Uganda should host major investment conferences and forums that will signal Uganda's intention to be a major player in the region as a viable investment destination. One of such conferences could be a Hotel Investment Forum that would attract both international and regional players in accommodation, food, beverage and related service providers.

The Diaspora: the Ugandan Diaspora, especially in North America and the UK can be made better aware of the investment opportunities that tourism can offer. Returnees are also often excellent sources of innovation, having been exposed to a wide range of business opportunities and experiences in different parts of the world.

Sovereign Wealth Funds (SWFs): these state-owned funds comprise various forms of asset savings and are managed for investment purposes to help diversify the revenue base of the country concerned. These are typically managed through a governmental agency, as the authority established specifically for that purpose.

Special Economic Zones (SEZs): with the enactment of the Free Zones Bill of 2010, focus should be on the creation of Tourism zones within the designated Tourism Development Areas to guide and facilitate tourism investment into those specific areas.

Business Angels: The tourism board should focus on attracting and facilitating wealthy individuals or institutions to invest in the tourism sector by taking equity shares in tourism-related business. This will not only provide seed finance, but will also offer business and financial management expertise to the companies.

Investment Clubs: a means for individuals to group together, and share expertise and risk - a concept that has been successful in other sectors such as in real estate development.

Special funds: The high cost of investment financing should be addressed through the initiation of special tourism sector line of credit to support government policy and encourage local investment - this approach has been successfully used in agriculture and industry sectors in Uganda. In the immediate-term, a matching grant facilitated through the Private Sector Foundation should be availed to the tourism sector under a business development support framework.

3.4.7.5 Co-ordinating Development Partners

Development partners support funding is among the sources of tourism financing. However there is inadequate donor coordination which needs to be addressed through formalised and informal structures to ensure that development resources are put to best use.

In order to foster improved donor co-ordination, the MoTWA should establish a desk specifically to handle stakeholder co-ordination activities, to gather and disseminate information on who is doing what in the sector. The office would serve as a contact point for development partners, relevant government actors, industry representative bodies (associations) and investors. The desk officer should participate in meetings of the Tourism Sector Working Group.

3.4.7.6 Opportunities for Public-Private Partnerships (PPPs)

PPP involves a contract between a public sector authority and a private party, in which the private party provides a public service or project and assumes substantial financial, technical and operational risk in the project. In some types of PPP, the cost of using the service is borne exclusively by the users of the service and not by the taxpayer. In other types (notably the private finance initiative), capital investment is made by the private sector on the basis of a contract with government to provide agreed services and the cost of providing the service is borne wholly or in part by the government.

Once the PPP 2010 bill is enacted, PPPs will be able provide an effective way of bridging the financing gap and address the inability of state corporations to mobilise adequate resources to fulfil their national mandates. However for the PPP approach to successfully be applied there is need for strong government commitment, elaborate incentives and clear benefits that will attract the private sector to partner with government.

Examples where PPPs could be deployed for supporting tourism related development in Uganda are identified below;

Entebbe International Airport (EIA): The Civil Aviation Authority has a 20 year master plan dating from 1992 and 2012 to modernise the airport and is considering the option of PPPs to fund its development in the face of limited government resources. This approach has been successfully adopted by other government agencies such as

Uganda National Roads Authority (UNRA) to build the Kampala-Entebbe expressway with a Chinese firm. Regional Airports: there should scope for PPP initiatives to enable expansion and upgrading of Uganda's network of regional airports, especially for improving and speeding-up access to the Tourism Development Areas (TDAs).

In western Uganda the burgeoning oil industry will be a catalyst for improving access to the main oilfields for personnel, equipment and supplies etc. by road as well as by air and this can also benefit tourism access and the wider regional economy providing environmental safeguards can be assured. Development of a second international airport has also been advanced by the CAA (in Gulu and Kasese) and this could also be the subject of a PPP once initial planning is further advanced in the context of a new National Aviation Master Plan being commissioned by the CAA in accordance with 'Vision 2040'.

Tourist Visitor Centres (TVCs): as multipurpose focal points within the TDAs, TVCs will house Tourist Information Centres (TICs), interpretation centres, catering and retail services and related facilities. As such they could provide opportunities for PPPs if it can be shown they have sufficiently attractive revenue generating potential for the private sector operator. Alternatively, the private sector could fund the infrastructure if the government were to pay a guaranteed annual fee to an operator.

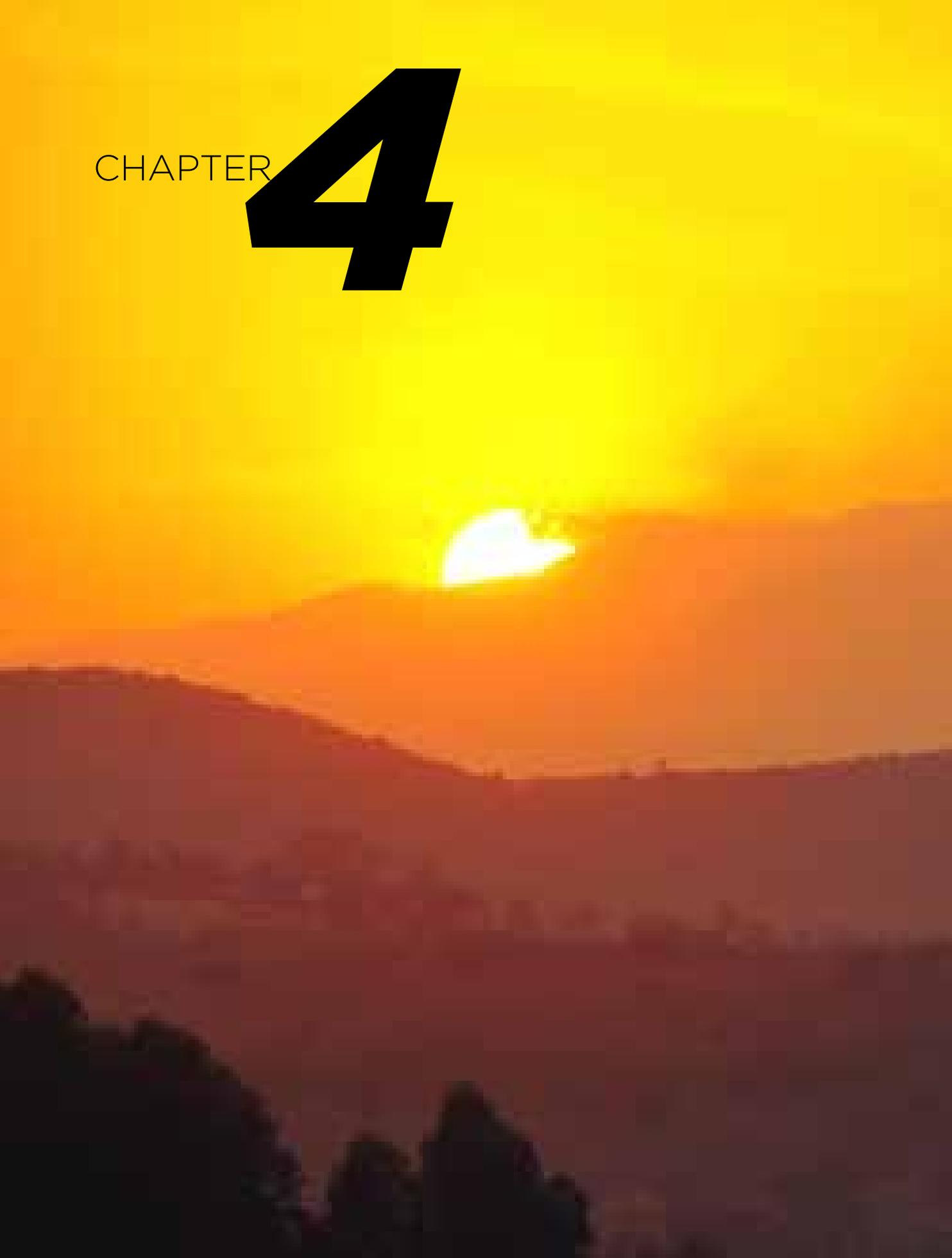
Tourism Training Institutions: HTTI could be open to the idea of a PPP arrangement for the much needed refurbishment and operation of the institute given that part of the World Bank loan will be used to build the (training) hotel adjacent to the main campus. Another option could be to execute a PPP whereby the lease income (paid by the private hotel operator) would be ring-fenced to part-fund the tourism school, thereby giving the latter a high degree of autonomy. Clearly there would be great scope for mutually beneficial synergies to develop between the two.

Kampala Exhibition and Conference Centre: This would be a major capital project that offers the most applicable and appropriate application of a PPP. Once the location – on public land - has been selected and agreed based the on necessary technical site evaluations and environmental impact assessments a public sector consortium in collaboration with the private sector would form a partnership to develop, build, maintain and operate the asset for the contracted period.



CHAPTER

4



4. Implementation Framework

This chapter presents the Tourism Master Plan implementation arrangements, sector coordination and engagement, communication strategy, monitoring and evaluation framework and the implementation matrix. The implementation plan is guided by the National Vision 2040 and builds on achievements of the various planning frameworks that have guided tourism development over the years.

The Master Plan lays down key strategies to consolidate and extend this performance for the period 2014 -2024, and guides the different stakeholders on how to realize sustained growth of the tourism sector.

The plan recognizes the highly competitive nature of the global and regional tourism industry. It highlights the need to develop a competitive edge by focusing on addressing the binding constraints to tourism growth – particularly by: improving accessibility and infrastructure in tourism areas; diversifying and improving the product packaging; building a strong and harmonized regulatory environment; empowering and developing a skilled and productive labour force; and building a strong market presence.

4.1 Implementation Arrangements

This plan recognizes the multi sectoral dimension of the tourism industry and focuses on mainstreaming and empowering the key sectors to build the synergies and actions that will develop and impact tourism along its value chain. Implemented will therefore be through the existing institutional structures and will focus on strengthening and streamlining the institutional roles to deliver on respective mandates in realization of the objectives of the plan.

4.1.1 Institutional Roles

This section identifies the key institutions, expounds on their institutional roles and highlights the sector engagement strategies needed to ensure that the Master Plan is fully implemented:

(a) Ministry of Tourism

The Ministry responsible for tourism will lead the policy development and implementation of the plan. It will initiate and manage the tourism sector wide coordination framework at the national and international levels to advocate, harmonize and guide the development of the industry. The ministry will specifically;

- formulate support legislation, regulation and guidelines to promote and develop tourism
- develop performance standards, monitor and evaluate the development and promotion of tourism by the key tourism institutions and MDAs

The implementation plan is guided by the National Vision 2040 and builds on achievements of the various planning frameworks that have guided tourism development over the years.

- build the capacity and support the mainstreaming of tourism in the MDAs, private sector associations and enterprises
- support the establishment of regional tourism development areas and district tourism development plans
- establish and implement the integrated tourism management information system to collate and disseminate tourism related statistics
- spearhead implementation of national tourism flagship projects
- mobilize resources to support tourism development and secure conditional grants for Local Government based tourism initiatives

(b) Uganda Tourism Board

UTB will lead the promotional and quality assurance functions of the sector. In fulfillment of this mandate, UTB will: support the development and packaging of diverse and competitive tourism products; promote the destination to the domestic, regional and international markets; build a robust quality assurance system; and promote investment and enterprise growth. The Board will develop plans aligned to the Tourism Master Plan to implement its mandate and achieve the national development objectives.

(c) Uganda Wildlife Authority

UWA will conserve and protect the ecological integrity of wildlife resources and wildlife protected areas. In fulfillment of this mandate, UWA will: expand and diversify tourism products in the PA's; improve existing and develop new tourism infrastructure to improve the tourism experience in wildlife conservation areas; pursue conservation and restoration of degraded wildlife resources; and promote wildlife based enterprise. The Authority will develop and implement plans aligned to the tourism master plan to implement its mandate and achieve the national development objectives.

(d) Uganda Wildlife Education Center

UWEC is mandated to support and promote education and awareness of wildlife resources, rescue and rehabilitate wildlife. In fulfillment of this mandate, UWEC will expand and diversify the stock in its wildlife exhibition, establish regional wildlife education centers, promote mobile exhibitions and support regulation and development of ex-situ wildlife enterprises.

(e) Department of Museums and Monuments

Department of Museums and Monuments is mandated to conserve and protect national cultural and heritage resources. In fulfillment of this mandate, the department will: develop and expand the current museum permanent exhibition to incorporate new and emerging categories of exhibitions; establish regional museums; and support the establishment of private and community museums.

More so the Department will: update the database and status of cultural and heritage sites of national value; establish guidelines and support the nomination and conservation of national and international monuments and heritage sites; strengthen the conservation, regulation and management of monuments and heritage sites; support and build the capacity of local governments, cultural institutions, public and private custodians of heritage resources to protect, develop and promote these resources for tourism.

(f) Hotel and Tourism Training Institute and Uganda Wildlife Training Institute

HTTI and UWTI institutions are mandated to develop the human resource capacity of the tourism, wildlife and hospitality management labour force in fulfillment of their mandate. The institutions will develop into international centers of excellence through providing high quality training and research services and develop competitive training programmes, establish satellite training centers and introduce electronic educational platforms.

In addition to the above institutions, the Master Plan identifies key Ministries, Departments and Agencies (MDAs) that either directly or indirectly support the development of the tourism sector. For each sector the Master Plan identifies the key interventions expected and the key stakeholders involved as summarized in Table 19

Table: 4. 1 The role of Key MDAs Supporting Tourism

Sector	Key Interventions	Key Stakeholders
Transport Sector	<p>Promoting accessibility and addressing the cost of travel which is important to attracting and facilitating more travel and tourism. In this regard government will focus on the following actions to support travel;</p> <p>Road Transport Development</p> <ol style="list-style-type: none"> 1. Prioritization to develop the key tourism roads 2. Development of tourism information and directional signage on all major highways 3. The provision of Tourist stop over points and have them incorporated in all major road developments 4. Prioritize programmes to ease traffic congestion in the city 5. Support incentives for tour operators to procure tourist special purpose vehicles <p>Rail development The redevelopment of rail transport system will mainstream tourism by prioritizing accessibility to tourist attraction areas, passenger travel and developing tourist facilities at key rail stations</p> <p>Water transportation</p> <ol style="list-style-type: none"> 1. Conduct Technical mapping studies of all key water bodies to facilitate safe water navigation particularly on Lake Victoria and the river Nile. 2. Support the promotion of cost effective water transportation through incentives for innovative and efficient water transport technologies 3. Support the mapping and development of tourist itineraries of key tourist attraction areas within the water bodies particularly on the islands of Lake Victoria and along the River Nile 4. Develop and facilitate the East Africa regional tourist travel on Lake Victoria <p>Air transportation</p> <ol style="list-style-type: none"> 1. Renovation and expansion of the international airports and airstrips 2. Establish new airstrips in underserved tourist areas 3. Support the establishment of scheduled domestic flights to key tourism areas 4. Support the establishment and coordination of an air rescue service for emergencies in tourist attraction areas 5. Facilitate the development of a cost effective domestic and regional air service 	MoWT, UNRA,CAA, DWD MoLG

Sector	Key Interventions	Key Stakeholders
Justice, Law and Order	<p>Development of tourism and travel industry requires conducive legal environment. Ministry of Tourism will work closely with the Justice, Law and Order sector to institute and support a regulatory environment in the areas of;</p> <p>Regulation Development</p> <ul style="list-style-type: none"> • Review and harmonize multiple regulations to facilitate tourism trade • Support the development of operational regulations and guidelines for the tourism sub sectors <p>Immigration</p> <ul style="list-style-type: none"> • Support development of electronic visa processing platforms • Promote and facilitate the East African single visa • Build the capacity of immigration officers in customer handling and visitor statistics collection • Promote the integration of electronic visitor data verification and information collection and sharing platforms e.g. PISCES <p>Tourism policing</p> <ul style="list-style-type: none"> • Expand and support Tourism Police deployment in key tourism attraction areas • Build the capacity of the Tourism Police to investigate and prosecute tourism related crime • Build the capacity of Tourism Police to support visitor information and service needs • Support the collection of travel and tourism visitor statistics • Support tourism regulation enforcement and quality assurance 	MoIA, MoJCA
International and Regional Affairs	<p>The competitiveness of the destination is enhanced by actions that broaden the country's visibility and positive image in the international community and easing the facilitation of travel. The Tourism sector in Uganda will achieve these objectives by working with the international relations sector on the following interventions;</p> <ul style="list-style-type: none"> • Promoting good relations with the regional neighbors • Support member states to mainstream regional tourism plans in national development plans • Promoting the East African single visa and visa on arrival provisions • Promoting travel facilitation through the online visa processing platforms • Facilitate destination promotional programmes and visitor information provision • Support proactive engagement programmes to address negative travel advisories and crisis management • Support partnership development with international tourism and travel organizations • Attract regional investment into the tourism sector 	MoFA, MTIC, MEACA, IGAD secretariat

Sector	Key Interventions	Key Stakeholders
Local Government	<p>The development of Tourism attractions and enterprises will be supported and promoted by the local government administration areas. The sector will work with the local governments to achieve the development objectives through the following interventions;</p> <ul style="list-style-type: none"> • Support the identification, zoning and facilitation of key tourism attraction areas • Support to identify, gazette and protect key tourism installations, nature and cultural heritage attractions • Mainstream tourism in all local government sector development programmes and allocate them development budgets • Support and promote the establishment of regional tourism clusters • Strengthen tourism regulation and data collection services • Establish district tourism associations to coordinate public and private sector development • Condition half of the local service tax collection to tourism development activities • Establish district tourism focal point development offices • Establish green parks and greening programmes in the local urban centers • Mobilize and guide communities to integrate tourism in their development initiatives • Promote investment, incentive and attraction of tourism enterprise • Establish and monitor tourism development performance indicators 	MoLG, Districts
Water and Environment	<p>The sector will coordinate with the water and environment sectors to promote the following initiative;</p> <ul style="list-style-type: none"> • Protect wildlife resources in the forest reserves and wetlands • Establish and promote ecotourism products within the forest reserves and wetlands • Protect lake and river shores from encroachment and pollution • Strengthen and coordinate the enforcement of EIA and Audits in tourism enterprises and developments. • Strengthen the enforcement of pollution control laws and guidelines • Support programmes to mitigate climate change and promote the green environment programmes • Support the control and protection of water and forest reserves from invasive species and pollutants 	MoWE, NFA, NEMA

Sector	Key Interventions	Key Stakeholders
Energy Sector	<p>A competitive tourism sector will be hinged on the accessibility, prudent use and cost effectiveness of the energy supplies to the tourism enterprises. The sector will coordinate with the energy sector to promote the following actions;</p> <ul style="list-style-type: none"> • Enhance and widen the network grid of energy supply to tourism attraction areas and enterprises • Promote alternative sustainable energy sources in tourism areas - particularly those outside the supply range of the hydro electric grid • Support and promote energy efficient measures in tourism enterprises • Regulate oil exploration and development activities in the conservation areas to protect the eco systems • Regulate energy programmes like hydroelectric dam construction to avoid them negatively impacting on tourism resources and attractions • Mainstream tourism development in major energy and mineral development projects 	MoEM, ERA, REF,
Gender, labour and Culture	<p>Uganda is endowed with a rich and diverse cultural attraction resource. To develop this resource the sector will enhance coordination to achieve the following actions;</p> <ul style="list-style-type: none"> • To initiate a mapping and documentation of cultural tourism resources and attractions • To protect and develop cultural tourism products • Support cultural institutions to protect and develop their cultural assets as tourism products • Promote and empower youth, women and marginalized communities to benefit from tourism • Promote the enforcement of occupational health and safety regulations in the tourism sector • Promote the enforcement of labour laws and fair-trade practices in the tourism sector 	MGLSD
Defense and Security	Ensure safety and security of tourists, tourism resources and installations	MoD, MoIA
Office of the Prime Minister	<p>Ensure that all MDAs mainstream tourism in implementation of their mandates</p> <p>Require all public officers traveling abroad to mandatorily travel with tourism promotional materials</p> <p>Ensure a Tourism Disaster Management Plan is formulated</p>	OPM
All other MDAs	While implementing their respective mandates, all MDAs will mainstream tourism in their respective sectoral planning and implementation of activities	OPM

4.2 Sector Coordination and Engagement

Tourism being a multi sectoral industry, the government will engage all players and mainstream tourism in all sectors to support the holistic development of the industry. In pursuit of this goal, the sector will actively engage and empower the existing structures of policy formulation (Cabinet and Parliament) and policy implementation (Ministry and Agencies). To further enhance coordination and engagement the sector will create and promote the development of new governance and service delivery structures (Tourism Coordination Committee, Tourism Sector Working Group, Tourism Development Areas and Tourism Private Sector Associations) – as illustrated in Figure 4.1 and explained below.



To further enhance coordination and engagement the sector will create and promote the development of new governance and service delivery structures

4.2.1 Policy Formulation and Implementation

The key policy making and monitoring organs of government are the executive and legislative arms. In order to enhance the coordination and implantation of the Tourism agenda, the ministry will promote the engagement of these structures by supporting an adhoc tourism cabinet committee to address the mainstreaming and coordination of tourism implementation programmes

The ministry will actively engage the Session Committee and the Parliamentary Advocacy Committee to promote the tourism agenda. The ministry will promote and build awareness of the impact and value of tourism in the social and economic transformation, to the public opinion leaders and policy making institutions and leverage their iconic and political power to sensitize the general public and promote the tourism agenda.

Government will recognize and support the Uganda Tourism Association to provide an official voice and effectively represent the interests of the private sector.

4.2.2 Tourism Sector Coordination

Tourism Coordination Committee: The ministry will establish a Tourism Coordination Committee structure composed of the key implementing agencies that will harmonize and coordinate the development programmes, and address issues and propositions generated by the various consultative and advocacy forums. The ministry will establish and support a framework of the tourism coordination committee to convene and make decisions for implementation.

Tourism Sector Working Group: In recognition of the tourism sector as a multi sectoral enterprise, the ministry will establish and coordinate a Tourism Sector Working Group comprised of key Ministries, Departments and Agencies that impact on tourism development. The business of the sector working group will be generated and developed through thematic groups that cluster common interest areas. The initial thematic groups will include; marketing, infrastructure, quality assurance, development partners, media and communication. The ministry will establish and support a framework of regular consultation with the tourism sector working group

Private Sector Coordination: Tourism enterprises grow and expand along the value chain. As these enterprises grow, they tend to cluster and associate to address issues of common interest through actions of advocacy, knowledge sharing and joint bargains.

Government will recognize and support the Uganda Tourism Association (the umbrella association that enjoins all sub sector associations) to provide an official voice and effectively represent the interests of the private sector. Government will also, through the umbrella body, support the sectoral associations representing key sub sectoral enterprises such as tour operators, hoteliers, travel operators, tour guides, and community groups.

The ministry will develop guidelines to support the accreditation and development of the tourism associations, coordinate the tourism agencies and institutions, and establish a frame work of regular consultation to interface with the private sector.

Tourism Development Areas: As noted in the situational analysis management of tourism is largely centralized around the public sector and lacks an effective presence at the decentralized structures of governance. Additionally, most natural and cultural tourism attractions have a presence in more than one local government. In order to effectively develop and promote these resources, the sector will cluster districts with common tourism attractions as regional Tourism Development Areas (TDAs).

The ministry will organize the districts into viable Tourism Development Areas and support them to plan and coordinate regional tourism development. Development of tourism in the TDA will radiate from a focal district and town that will host the coordination office. A regional tourism coordinator will be appointed to support the development, promotion, regulation and implementation of tourism policies in the region.

The ministry will facilitate the development of tourism support infrastructure and offices at the regions including a tourism capacity building and information management center.

Tourism Clusters: Tourism clusters are an emerging concept enjoining the tourism stakeholders along a regional or interest area. These groupings have convened as a result of common interest with adhoc organizational arrangements and specific objectives ranging from advocacy for tourism infrastructure, popularizing attraction areas to organizing tourism expos.

The sector recognizes the importance of clusters in guiding and empowering tourism development. In this regard the ministry will support clusters to strengthen governance structures and create an interface platform to coordinate and support the objectives of the clusters. More so the ministry will promote and support the development and replication of tourism clusters in emerging tourism development areas to bridge the stakeholder mobilization and empowerment objectives

District Tourism Development: To enhance tourism development at the district level, the ministry will:

- support the development of district level structures to enhance the public sector management of tourism
- coordinate with the local governments to establish tourism development focal offices and promote the tourism development committee structures in all districts
- support the development of district tourism development plans and establish a performance monitoring framework
- build the capacity of the districts to establish product development, promotion and quality assurance programmes
- support the establishment of tourism development associations' enjoining the public and private sectors to manage common interest and issues of tourism development

4.3 The Communication Strategy

4.3.1 Goal

To institutionalise a systematic, comprehensive, and coherent approach to communication that will foster public confidence and stakeholder engagement in the tourism sector.

4.3.2 Objectives

- 1) To formulate a framework for planning and managing the communication function in the tourism sector.
- 2) To develop mechanisms for coordination and collaboration among stakeholders in all domains of tourism.
- 3) To create a system for generating and disseminating information to attract foreign visitors and enlist the participation of citizens in tourism activities.

4.3.3 Action Plan and Strategic Interventions

In response to the communication challenges and issues that have been singled out for prioritisation, the strategy recommends an action plan based on a set of strategic interventions, with each intervention revolving around a series of action points and key result areas.

- 1) Create a structure to facilitate sectoral management of the communication function and stakeholder engagement.
- 2) Design a public relations plan that will institutionalise a robust system of internal communication within and outreach to the tourism external audiences.
- 3) Develop a media relations plan through which sector will build a mutually productive relationship with media industry.

- 4) Formulate a community outreach plan through which sector will engage with and bring on board communities in local tourist destinations.
- 5) Develop an advocacy plan through which sector will secure support for the tourism sector and the buy-in of influential actors.
- 6) Devise a crisis communication plan that will enable the tourism sector to manage crises and reputational risks.



4.4 Monitoring and Evaluation Framework

KEY RESULT AREAS	OUTPUT INDICATORS	OUTCOMES
STRATEGY 1: Create a structure to facilitate sectoral management of the communication function and stakeholder engagement by MoTWA.		
1. Define roles and composition of TCWG.	<ul style="list-style-type: none"> Ministerial approval of TCWG's terms of reference A fully constituted and operational TCWG TCWG annual work plan Periodical reviews of the communication function 	<ul style="list-style-type: none"> A culture of timely and regular information-sharing institutionalised. Higher confidence in MoTWA's role as mediator for the industry's interests. MTWA's capacity for dialogue and engagement with stakeholders strengthened.
2. Seek ministerial/management endorsement of TCWG.		
3. Build and maintain relations with stakeholders.		
4. Liaise with UTB in marketing the destination.		
5. Define and divide communication roles among stakeholders.		
6. Assess the performance of the communication function.		
STRATEGY 2: Design a public relations plan that will institutionalise a robust system of internal communication within MTWA and outreach to external audiences.		
1. Conduct baseline KAP survey.	<ul style="list-style-type: none"> KAP survey conducted within 6 months of the roll out of the communication strategy Tourism information products and messages disseminated Talk shows aired Events calendar circulated Quarterly meetings held with private sector representatives 	<ul style="list-style-type: none"> Greater public awareness of and interest in tourism. All internally generated knowledge of public interest regularly tracked, documented, and shared. Information of public interest packaged and disseminated in accessible and user-friendly formats.
2. Produce public information packages out of key policy and working documents.		
3. Publish monthly in-house e-newsletter.		
4. Publish bi-annual sectoral magazine.		
5. Sponsor quarterly radio and TV talk shows in TDAs.		
6. Develop tourism events calendar.		
7. Develop standardised messages and facts on tourism.		
8. Create public information materials and resources.		
9. Develop popular versions of key policy and working documents.		
10. Engage the private sector.		

**STRATEGY 3:
Develop a media relations plan through which MTWA will build a mutually productive relationship with journalists and the news industry.**

1. Conduct baseline media content analysis.	<ul style="list-style-type: none"> • Baseline content analysis conducted within 6 months of the roll out of the communication strategy • Ministerial briefings at Uganda Media Centre briefings • Staff undertake media training • Daily media tracking and reports • News releases on important developments • Periodical interactions with journalists • Annual tourism reporting awards sponsored • Tourism champions identified and engaged in promotional activities 	<ul style="list-style-type: none"> • More constructive and sustained coverage of tourism issues. • Increased media coverage of tourism. • More regular and pro-active supply of information to journalists. • More favourable investor attitudes towards Uganda's tourism industry.
2. Liaise with the Uganda Media Centre on communicating tourism issues.		
3. Organise quarterly ministerial briefings.		
4. Provide media training for senior and field staff.		
5. Monitor media coverage.		
6. Establish media response mechanisms.		
7. Issue periodical news releases.		
8. Procure media monitoring services.		
9. Use monitoring data to inform media responses and content.		
10. Network with journalists who cover the tourism sector.		
11. Sponsor tourism media awards.		
12. Create media kit.		
13. Identify public figures to serve as tourism ambassadors.		

**STRATEGY 4:
Formulate a community outreach plan through which MoTWA will engage with and bring on board communities in local tourist destinations.**

1. Organise sensitisation workshops for communities/leaders in TDAs.	<ul style="list-style-type: none"> • Sensitisation workshops and community dialogues conducted in TDAs • Customised community information products disseminated 	<ul style="list-style-type: none"> • Local communities place greater value on local tourist resources. • Local communities get more involved in harnessing local tourism opportunities to improve their livelihoods. • Higher sense of ownership of and identification with local tourism initiatives.
2. Produce information on community benefits from tourism.		
3. Support local leaders and DCOs to network and dialogue with communities.		

STRATEGY 5: Develop an advocacy plan through which MoTWA will secure support for the tourism sector and the buy-in of influential actors.		
1. Review tourism research and publications for dissemination.	<ul style="list-style-type: none"> • Policy information products disseminated • Advocacy activities conducted in TDAs • Tourism policy promoted and popularised • E-forum for tourism stakeholders activated 	<ul style="list-style-type: none"> • Better appreciation by policy and decision makers of the links among economic growth, poverty reduction, and investment in tourism. • Greater spotlight on the broader issues that impact allocation of resources to tourism at the national and sub-national levels. • Existing partnerships consolidated and new ones nurtured and embraced.
2. Review media tracking findings and respond as needed.		
3. Seek opportunities for linkages and collaboration within MTWA and with stakeholders.		
4. Build capacity and devolve advocacy to TDAs.		
5. Use tourism-related events and milestones as advocacy opportunities.		
6. Promote awareness of and will to implement the tourism policy and master plan.		
7. Create e-forum to link tourism stakeholders.		
8. Produce periodical information packages for use by DCOs and TDAs.		
9. Identify and disseminate tourism data.		
STRATEGY 6: Devise a crisis communication plan that will enable MoTWA and the tourism sector to manage crises and reputational risks.		
1. Conduct regular environmental scans to detect (potential) crises.	<ul style="list-style-type: none"> • Quarterly sectoral environmental scan reports • Tourism incorporated in national crisis management plan • Crisis communication plan implemented when situations occur 	<ul style="list-style-type: none"> • Improved level of preparedness to deal with crises affecting the tourism sector. • More pro-active involvement in inter-agency responses to crises management.
2. Integrate crisis communication into national crisis management.		
3. Gather and approve all public information during crises.		
4. Monitor public reaction to crises and respond as appropriate.		

4.5 Implementation matrix

The Master Plan provides a systematic implementation matrix (Table 20) detailing the key issues, the strategic interventions, key performance indicators, time framework and the responsible stakeholders. The implementation strategy is planned in three phases (Phase 1 – Consolidation, Phase 2 – Expansion and Diversification and Phase 3 – Sustained Growth) over ten years, and takes into account both what is feasible within this timeframe and the likely availability of financial and human resources.

Programme	Key issues	Strategic interventions	Key Performance Indicators	Time Frame										Responsible Agencies	Costing (UGX. Billion)			
				Consolidation			Expansion & Diversification				Sustained Growth							
				1	2	3	4	5	6	7	8	9	10					
Tourism Planning and Management	Inadequately resourced tourism institutions	<ul style="list-style-type: none"> Enhance human resource capacity to implement plans Review, formulate and implement the regulatory laws and guidelines Ensure supporting tourism regulations and guidelines are in place Strengthen the implementation of existing laws and guidelines Recruit staff for tourism information management Provide funding for tourism research Operationalize the Tourism Satellite Account system Establish a tourism observatory system Develop a regulatory framework to allow stakeholders to regularly submit data to a central system. Develop an inter-ministry data collection and sharing mechanism Establish a collaboration mechanism with local governments in tourism data collection Establish a Tourism Information Management system 	<ul style="list-style-type: none"> Number of human resource capacity trainings Number of personnel recruited and retained Extent of regulatory laws and guidelines implementation Number of supporting tourism regulations and guidelines developed Extent of implementation of existing laws and guidelines Number of tourism information management staff recruited Amount of funding provide for tourism research Fully operational Tourism Satellite Account system An establish tourism observatory system A regulatory framework developed An Inter-ministry data collection and sharing mechanism established Collaboration mechanism established An operational Tourism Information Management system 	X	X	X	X	X	X	X	X	X	X	X	MoTWA (lead)	150		
				X	X	X	X	X	X	X	X	X	X	X	X	MoFPED		
				X	X	X	X	X	X	X	X	X	X	X	X	X	MoPS	
				X	X	X	X	X	X	X	X	X	X	X	X	X	MoTWA (lead)	
				X	X	X	X	X	X	X	X	X	X	X	X	X	MoFPED - UBOS - URA	
				X	X	X	X	X	X	X	X	X	X	X	X	X	MoPS	
				X	X	X	X	X	X	X	X	X	X	X	X	X	Academic Institutions	
				X	X	X	X	X	X	X	X	X	X	X	X	X	MoICT	
				X	X	X	X	X	X	X	X	X	X	X	X	X	MoLG	
				X	X	X	X	X	X	X	X	X	X	X	X	X	Private sector	

Programme	Key issues	Strategic Interventions	Key Performance Indicators	Time Frame										Responsible Agencies	Costing (UGX. Billion)				
				Consolidation		Expansion & Diversification					Sustained Growth								
				1	2	3	4	5	6	7	8	9	10						
		<ul style="list-style-type: none"> Establish a strong dedicated research unit Identify and purchase tourism/market intelligence information 	<ul style="list-style-type: none"> strong dedicated research unit established Amount of tourism/market intelligence purchased 																
Infrastructure Development	<p>Road transport Poor state of some roads to key tourism areas</p> <p>Insufficient purpose built rest stops</p> <p>Inadequate signage</p> <p>Limited tourist tracks within some tourism destinations areas</p> <p>Air Transport High cost of regional flights</p> <p>Existence of only one international airport</p> <p>Need for national carrier</p> <p>Need to upgrade upcountry airfields</p> <p>Water transport Limited water transport facilities</p> <p>Railway Transport Absence of passenger railway services</p> <p>Accommodation and Hospitality Facilities • Few budget, mid-range and high-end accommodation facilities in key tourism areas</p>	<ul style="list-style-type: none"> Construct new roads and upgrade priority tourism roads Establish tourism stop overs on key tourism routes Install tourist signage on roads to key tourism areas Establish and upgrade tracks, walkways, footbridges in key tourist destinations Negotiate for lower charges and harmonize regional flights using regional cooperation framework Establish/upgrade selected airfields into an international airports in key tourism areas Establish a National carrier Upgrade upcountry airfields in key tourism destinations Establish water transport facilities (ferries, boats, launch cruises etc) Introduce passenger railway services Encourage and support investment in accommodation sector (esp. mid-range & budget) in key tourism areas 	<ul style="list-style-type: none"> Length of roads developed and upgraded Number of tourism stop overs constructed Number of tourist signage installed Number and length tracks, walkways, footbridges upgraded/constructed Reduction in regional flight costs Number of established/upgrade airfields into an international airports established Number of upcountry airfields upgraded Number of established water transport facilities Number/capacity of passenger railway coaches Number of accommodation facilities established 	X	X	X	X	X	X	X	X	X	X	X	X	X	X	MoWT (lead) - UNRA MoFED	3,500

Programme	Keyissues	Strategic Interventions	Key Performance Indicators	Time Frame										Responsible Agencies	Costing (UGX. Billion)		
				Consolidation			Expansion & Diversification				Sustained Growth						
				1	2	3	4	5	6	7	8	9	10				
Conservation of Natural and Cultural heritage	<ul style="list-style-type: none"> Encroachment on protected areas Loss biodiversity Loss of wildlife habitat 	<ul style="list-style-type: none"> Lobby for political support and good will in protecting natural resources Review and Enforce conservation laws Increase public awareness Strengthen community conservation initiatives Clearly mark and secure all Protected Area boundaries Regularly inspect Protected Areas to ensure sustainable management Increase financial resources to conservation agency 	<ul style="list-style-type: none"> Size of areas under protection Incidences of illegal activities reported Number of public awareness campaigns Number of community conservation projects initiated and implemented Number of Protected Areas with marked boundaries Number of inspections undertaken Amount of finances committed to conservation 	X	X	X	X	X	X	X	X	X	X	X	X	MOTWA <ul style="list-style-type: none"> UWA UWEC UCOTA Private sector MoEM MEW	1000
				X	X	X	X	X	X	X	X	X	X	X	X		
	Limited private sector and community involvement/participation in conservation	<ul style="list-style-type: none"> Build capacity of private sector and local communities to be involved in conservation 	<ul style="list-style-type: none"> Number of communities & private sector involved in conservation 	X	X	X	X	X	X	X	X	X	X	X	X		
	Limited implementation of Trans-boundary resource management agreements	<ul style="list-style-type: none"> Strengthen implementation of Bi/multilateral conservation agreements 	<ul style="list-style-type: none"> Number of Bi/multilateral conservation meetings participated in Number of national plans to implement international protocols Number of nationally sponsored resolutions adopted in international protocols 	X	X	X	X	X	X	X	X	X	X	X	X		
	Illegal wildlife trade, poaching	<ul style="list-style-type: none"> Enhance wildlife monitoring and control Strengthen adherence and observation of international conservation conventions and treaties 	<ul style="list-style-type: none"> Reduced Number of illegal trade and poaching cases Number and extent of international conventions and treaties adhered to 	X	X	X	X	X	X	X	X	X	X	X	X		

Programme	Key issues	Strategic Interventions	Key Performance Indicators	Time Frame										Responsible Agencies	Costing (UGX. Billion)			
				Consolidation			Expansion & Diversification				Sustained Growth							
				1	2	3	4	5	6	7	8	9	10					
Human/Wildlife conflicts	<ul style="list-style-type: none"> Strengthen sector institutional capacity to handle conflicts Continued sensitization and awareness of communities Establish and maintain barriers along protected areas Review revenue sharing arrangements to mitigate human-wildlife conflicts 	<ul style="list-style-type: none"> Number of conflicts successfully handled Number of communities sensitized Number, and extent of barriers established & maintained A reviewed revenue sharing arrangement 	X	X	X	X	X	X	X	X	X	X	X					
			<ul style="list-style-type: none"> Ensure co-existence of wildlife and oil/ gas activities Establish standards, guidelines and mitigation measures Enhance capacity of wildlife sector institutions to monitor impacts of oil and gas 	<ul style="list-style-type: none"> Number of environmental compliance audits reports made and implemented Standards, guidelines and mitigation measures formulated Number of monitoring visits 	X	X	X	X	X	X	X	X	X	X	X			
					<ul style="list-style-type: none"> Enhance and support wildlife research and training Collaborate with Universities and other research institutions 	<ul style="list-style-type: none"> Number of research and training initiatives supported Number of MOU's signed 	X	X	X	X	X	X	X	X	X	X		
							X	X	X	X	X	X	X	X	X	X	X	
<ul style="list-style-type: none"> Limited wildlife research and training 	<ul style="list-style-type: none"> Involve cultural institutions in documentation and knowledge transfer Enhance public awareness Review and strengthen the legal and regulatory framework Support training institutions Promote skills education and exchange programmes 	<ul style="list-style-type: none"> Number of cultural institutions involved 	X	X	X	X												
<ul style="list-style-type: none"> Cultural heritage Limited documentation, interpretation and awareness of historical and cultural heritage resources Limited training and experts in cultural heritage conservation Limited coordination between regional/ community museums and cultural centres Limited funding and investment 	<ul style="list-style-type: none"> Involve cultural institutions in documentation and knowledge transfer Enhance public awareness Review and strengthen the legal and regulatory framework Support training institutions Promote skills education and exchange programmes 	<ul style="list-style-type: none"> Number of cultural institutions involved 	X	X	X	X												

• **MoTWA**
Dept. of
Museums &
monuments

MGLSD
Cultural
institutions

Programme	Key issues	Strategic Interventions	Key Performance Indicators	Time Frame										Responsible Agencies	Costing (UGX. Billion)			
				Consolidation			Expansion & Diversification									Sustained Growth		
				1	2	3	4	5	6	7	8	9	10					
		<ul style="list-style-type: none"> Establish and maintain a network of regional/ community museums and cultural centres in the country Create enabling environment for development of private Museums and cultural centres Promote PPP's in development and management of museums 	<ul style="list-style-type: none"> Number of documentation published Number of public awareness campaigns conducted Reviewed legal and regulatory framework Number of training institutions supported Number of skills education and exchange programmes A network of established Number of private Museums and cultural centres developed Number of PPP agreements signed 	X	X	X	X	X	X	X	X	X	X	X	X			
Product Development	<p>Limited awareness of Uganda tourism products</p> <p>Limited product development skills and capacity</p> <p>Limited zoning of potential tourism product areas</p>	<ul style="list-style-type: none"> Conduct comprehensive product mapping Increase tourism product awareness Mobilise funding for product development Limited exposure to product development examples Create Tourism Development Areas (TDAs) 	<ul style="list-style-type: none"> Comprehensive product mapping report Number of product awareness campaigns Number of products developed Amount of funds mobilised Number of complied product development examples Number of operational Tourism Development Areas 	X	X	X	X	X	X	X	X	X	X	X	X	X	500	MoTWA (Lead) - UTB, UWA Regional Tourism Clusters

Programme	Key issues	Strategic Interventions	Key Performance Indicators	Time Frame										Responsible Agencies	Costing (UGX. Billion)		
				Consolidation			Expansion & Diversification				Sustained Growth						
				1	2	3	4	5	6	7	8	9	10				
	Limited quality vocational and technical training institutions	<ul style="list-style-type: none"> Strengthen the supervision and quality assurance of training institutions Upgrade HTTI and UWTI to training centres of excellence 	<ul style="list-style-type: none"> Number of certified training institutions Upgraded HTTI and UWTI to centres of excellence 	X	X	X	X	X	X								
	High cost of establishing tourism and hospitality training	<ul style="list-style-type: none"> Create an enabling environment to attract to tourism training investments 	<ul style="list-style-type: none"> Number and amount of investments 	X	X		X										
	Limited tourism Research and Development	<ul style="list-style-type: none"> Promote sector demand driven tourism research 	<ul style="list-style-type: none"> Number of applied researches conducted 	X	X	X	X	X	X	X	X	X	X	X	X	X	
	Unfavourable image of the tourism profession	<ul style="list-style-type: none"> In-build tourism education in curriculum at all education levels Strengthen tourism profession career guidance 	<ul style="list-style-type: none"> Tourism In-built in education curriculum Profession career guidance seminars held 	X	X	X	X	X	X	X	X	X	X	X	X	X	
	Limited Continuous Professional Development (CPD) among tourism enterprises	<ul style="list-style-type: none"> Support training institutions and professional associations to offer CPD's 	<ul style="list-style-type: none"> Number of CPDs conducted by training institutions and professional associations 	X	X	X	X	X	X	X	X	X	X	X	X	X	
	Inadequate tourism management and development expertise – both at national and local levels	<ul style="list-style-type: none"> Reskill, train, recruit and retain staff 	<ul style="list-style-type: none"> Number of reskilled, trained, recruited and retained staff 	X	X	X	X	X	X	X	X	X	X	X	X	X	
Tourism Financing and Investment	Inadequate funding of sector	<ul style="list-style-type: none"> Operationalize the tourism development fund and levy Lobby government for increased funding of the sector Have conditional funding to local governments to support tourism development programmes Local government to give tourism funding priority in development plans Explore alternative funding for tourism sector 	<ul style="list-style-type: none"> Operational tourism development fund and levy Amount of funding increased Amount of conditional funding Prioritization rank of tourism Amount of funds from alternative sources 	X	X	X	X	X	X	X	X	X	X	X	X	X	50

Programme	Key issues	Strategic Interventions	Key Performance Indicators	Time Frame										Responsible Agencies	Costing (UGX. Billion)
				Consolidation			Expansion & Diversification				Sustained Growth				
				1	2	3	4	5	6	7	8	9	10		
Private Sector Capacity Development	Weak & fragmented sector players	<ul style="list-style-type: none"> Provide support to UTA and recognized umbrella trade associations Improve communication between government & private sector 	<ul style="list-style-type: none"> Type and amount of support provided Established communication mechanism 	X	X	X	X	X	X	X	X	X	X	MoTWA Private Sector • UTA • AUTO • UHOA • TUGATA MoFED MoTW PSFU Regional Tourism Clusters	25
				X	X	X	X	X	X	X	X	X	X		
	Low capitalization	<ul style="list-style-type: none"> Provide affordable credit and financing arrangements 	<ul style="list-style-type: none"> Amount of affordable credit and financing available 	X	X	X	X	X	X	X	X	X			
	Inadequate knowledge and skills base	<ul style="list-style-type: none"> Promote continuous professional development programmes 	<ul style="list-style-type: none"> Number of continuous professional development programmes conducted 	X	X	X	X	X	X	X	X	X			
	Weak business management capacity	<ul style="list-style-type: none"> Provide relevant training on trade fair/exhibitions Provide subsidized business development services for tourism private sector 	<ul style="list-style-type: none"> Number of people trained Number of enterprises that have accessed subsidized business development services 	X	X	X	X	X	X	X	X	X	X		
Community Tourism Development	Low business volumes in low tourism season	<ul style="list-style-type: none"> Promoting domestic/regional tourism flows in the low season Attract niche markets (retrees) 	<ul style="list-style-type: none"> Number of tourist travel in the low season Number of niche market tourists attracted 	X	X	X	X	X	X	X	X	X	UCOTA (Lead) COBATI UWA Cultural Institutions	25	
				X	X	X	X	X	X	X	X	X			
	Weak self-regulation	<ul style="list-style-type: none"> Develop/strengthen self-regulation mechanisms 	<ul style="list-style-type: none"> Number of enforced regulations 	X	X	X	X	X	X	X	X	X			
	Limited community tourism products	<ul style="list-style-type: none"> Build communities capacities in product development and diversification Create awareness of potential tourism products 	<ul style="list-style-type: none"> Number of product development and diversification trainings Number of awareness campaigns 	X	X	X	X	X	X	X	X	X			X
	Limited business management and entrepreneurial skills	<ul style="list-style-type: none"> Enhance business management and entrepreneurial skills training 	<ul style="list-style-type: none"> Number of people trained 	X	X	X	X	X	X	X	X	X			X
Inadequate linkage between private sector and community to ensure community development	<ul style="list-style-type: none"> Establish a framework for private/community collaboration Strengthen umbrella community associations 	<ul style="list-style-type: none"> Framework established 	X	X	X	X	X	X	X	X	X	X			

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The following documents were made available for consultation and taken into account by the project team during the formulation of the Master Plan.

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APPENDICES

APPENDIX 1 INTERVIEWEES AND COLLABORATORS

Name	Position	Organisation
Public Sector		
The Hon. Dr Maria Mutagamba	Minister	Ministry of Tourism, Wildlife and Antiquities
Ambassador Patrick Mugoya	Permanent Secretary	Ministry of Tourism, Wildlife and Antiquities
Mrs Grace Mbabazi Aulo	Ag Director, Tourism, Wildlife and Antiquities	Ministry of Tourism, Wildlife and Antiquities
Mr James Lutalo	Commissioner, Wildlife Conservation	Ministry of Tourism, Wildlife and Antiquities
Mwanja Nkaale Rose	Commissioner, Museums and Monuments	Ministry of Tourism, Wildlife and Antiquities
Mr Vivian Lyazi	Principal Tourism Officer and UNWTO Project Co-ordinator	Ministry of Tourism, Wildlife and Antiquities
Mr Alex Asiimwe	Ag Principal Policy Analyst	Ministry of Tourism, Wildlife and Antiquities
Mr Akankwasah Barirega	Ag Principal Wildlife Officer	Ministry of Tourism, Wildlife and Antiquities
Mr James Tumusiime	Chairman of the Board	Uganda Tourism Board (UTB)
Mr Baguma Cuthbert Balinda	Executive Director	Uganda Tourism Board (UTB)
Mrs Margaret Komuhendo Kobusinge	Head of Planning	Uganda Tourism Board (UTB)
Mr Edwin Muzahura	Marketing and Public Relations Manager	Uganda Tourism Board (UTB)
Ms Dorcas Namajja	Marketing/Information Officer	Uganda Tourism Board (UTB)
Mr Herman Olimi	Social Media Officer	Uganda Tourism Board (UTB)
Mr John Paul Waigo	Administration Manager	Uganda Tourism Board (UTB)
Mr Benjamin Otto	Chairman, Board of Trustees	Uganda Wildlife Authority (UWA)
Dr Andrew Seguya	Ag Executive Director	Uganda Wildlife Authority (UWA)

Mr Stephen SanyiMasaba	Business Development Manager	Uganda Wildlife Authority (UWA)
Mr Richard Kapere	Senior Planning Officer	Uganda Wildlife Authority (UWA)
Mr Samuel Amanaya	Conservation and Community Manager	Uganda Wildlife Authority (UWA)
Mr Stephen SanyiMasaba	Business Development Manager	Uganda Wildlife Authority (UWA)
Mr Emmanuel Dhikusooka	Head ICTU	Uganda Wildlife Authority
Ms Justine Namara	Planning Officer	Uganda Wildlife Authority
Mr John Makombo	Director Conservation	Uganda Wildlife Authority
Mr DhizaalaSanon Moses	Head of Research, Innovation, Monitoring and Evaluation	National Planning Authority
Mr OthienoOdoi	Senior Planner – Trade & Tourism	National Planning Authority
Mr Michael Mugisa	Executive Director	National Forestry Authority
Ms Tanaka Kanako	Japan Overseas Cooperation Volunteer	National Forestry Authority, Ecotourism Division
Mr Alex Mukuluma	Programme Officer	Ministry of Trade, Industry & Cooperatives – Enhanced Integrated Framework Sec.
Mrs ProsieKikabi	Investment Executive	Uganda Investment Authority
Mr Naava C. Nabagesera	Special Presidential Assistant	The President's Office
Dr Peter Ngategize	National Coordinator	CICS – Competitiveness and Investment Climate Strategy Secretariat
Ms Namutosi Miriam Amori	Ag. Principal	Hotel and Tourism Training Institute (HTTI)
Mr Samson Ndyaguma	Ag. Academic Registrar	Hotel and Tourism Training Institute (HTTI)
MukataShabanMuyaki	Hotel Manager	Hotel and Tourism Training Institute (HTTI)
Mr Samuel Echoku	Principal Statistician	Uganda Bureau of Statistics (UBOS)
Mr Wilson Nyegenye	Principal Statistician	Uganda Bureau of Statistics (UBOS)
Mr Sam Kaisiromwe	Senior Statistician	Uganda Bureau of Statistics (UBOS)
Mr Koire Y. Kugya	Statistician	Uganda Bureau of Statistics (UBOS)
Ms Justine Odongo	Road Maintenance Manager	Uganda National Roads Authority (UNRA)
Mr Davis Brian Muhwezi	Transport Planning Officer	Uganda National Roads Authority (UNRA)
Mr MedardMuganzi	Manager Energy for Rural Transformation	Rural Electrification Agency,
Mr Charles Auk	Assistant Commissioner, Telecoms and Posts	Ministry of Information and Communications Technology
Mr Jimmy Ambrose Atwoko	Deputy Director	Kampala Capital City Authority
Mr Alex M Mukuluma	Programme Officer	Ministry of Trade, Industry & Cooperatives Enhanced Integrated Framework Secretariat
Mr P. ElimuElyetu	Project Manager	Ministry of Trade, Industry & Cooperatives, Enhanced Integrated Framework Secretariat
Ms Bernadette Nabaggala	Assistant Human Resource Officer	National Council for Higher Education
Mr Otengei Samson Omuudu	Head of Department Leisure and Hospitality	Makerere University Business School
Private Sector		
Mr Anthony Chege	General Manager	Kampala Serena Hotel
Mrs Allen Ampaire	Country Sales & Marketing Manager	Kampala Serena Hotel
Mr CymonChamley	General Manager	Protea Hotel Entebbe
Ms Nicole Braun	Front Office Manager	Protea Hotel Kampala
Mr Ajit Singh	Front Office Manager	Speke Resort Munyonyo

Mr Isaiah Kojwang	Director Sales & Marketing	Holiday Express Hotel
Mr Justus ArihoByarugaba Managing Director	Managing Director	Hotel AribasMasindi
Ms Rebecca Nyamahunge	General Manager	Kabalega Resort Hotel Masindi
Mr Chris Pollard	General Manager	Sheraton Kampala Hotel
Mr Moses H Hussein	Personnel Officer	Sheraton Kampala Hotel
Mr Julius Bagonza	Manager Special Projects	Sheraton Kampala Hotel
Mr James Rattos	Asst Director of Sales and Marketing	Sheraton Kampala Hotel
Mr Solomon Kajoba	Managing Director	Hotel Sojvallo
Mr Gary Segal	Group General Manager	WildPlaces Africa
Mr Wekesa Amos Masaba	Managing Director	Great Lakes Safaris Ltd
Mr Mel Gormley	Director	Classic Africa Safaris
Mr AndimillehMakumbi	General Manager	Mweya Safari Lodge & Silverback Lodge
Mr Elijah M. Kaboyo	Tour Guide	Group Tours and Transporters
Mr Ashok Gurtu	General Manager	Haandi Group Restaurants
Mr Andrew Roberts	Editor	Bradt Guide to Uganda
Mr Celestine Katongole	Director Africa Region. Author, Uganda Domestic Tourism Study 2013 (UNDP)	Celes International Ltd
Mr James Ssebagala	Consultant. Author, Tourism Human Resource Capacity in Uganda 2013 (UNDP)	Hospitality Associates Consult
Dr George Lugalambi	Consultant	Appcom Associates Ltd.
Donor Agencies - NGOs		
Mr LebogangMotlana	Country Director	United Nations Development Programme (UNDP)
Mr Wilson Kwamya	Team Leader, Poverty Reduction Programme and UNWTO Project Director	United Nations Development Programme (UNDP)
Mr Nicholas Burunde	Project Officer, Poverty Reduction Programme and UNWTO Project Co-ordinator	United Nations Development Programme (UNDP)
Mr Alex Warren-Rodrigues	Economics Advisor	United Nations Development Programme (UNDP)
Mr Moses K. Kibirige	Financial and Private Sector Development	The World Bank
Mr John Tinka	Programme Manager	Kibale Association for Rural and Environmental Development (KAFRED)
Ms Maria Baryamujura	Executive Director	Community Based Tourism Initiatives (COBATI)
Industry Associations		
Mr Samuel G. L. Balagadde	Executive Director	Uganda Hotel Owners Association
Ms Jeanne Byamugisha	Executive Secretary	Uganda Hotel Owners Association
Mauku R. Moses	Director of Planning, Research & Development	Uganda Hotels, Food, Tourism & Allied Workers' Union
Mr Bonifence Byamukama	Chairman (and MD of Lake Kitandara Tour & Travel Ltd.)	AUTO - Association of Uganda Tour Operators
Mr Geoffrey Baluku	Secretary to the Board	AUTO - Association of Uganda Tour Operators
Mr Peter Kagwa	Chairman	EAU - Events Association of Uganda
Mr Herbert Byaruhanga	Chairman	Uganda Tourism Association ; Uganda Safari Guides Association
Ms Susan Nyanzi	CEO	TUGATA – The Uganda Association of Travel Agents

Ms Helen Lubowa	Executive Director	UCOTA - Uganda Community Tourism Association
Mr Felex Kamalha	Field Officer	UCOTA - Uganda Community Tourism Association
Mr Paulo Lubega	Field Officer	UCOTA - Uganda Community Tourism Association
Mr Gideon Badagawa	Executive Director	Private Sector Foundation Uganda
Ms Monica Malega	Advocacy Officer	Uganda Women Entrepreneurs Association Ltd
Mr Charles Ocici	Executive Director	Enterprise Uganda

Appendix 2

TOURISM AND HOSPITALITY INSTITUTIONS

Public and Private Sector Institutions Offering Tourism and Hospitality Programmes

Public institutions	Private institutions
1. Makerere University Kampala (MAK)	1. Nkumba University
2. Makerere University Business School (MUBS)	2. Kampala International University
3. Hotel and Tourism Training Institute (HTTI)	3. Kampala University
4. Uganda Wildlife Training Institute (UWTI)	4. Kabale University
5. Uganda College of Commerce, Tororo	5. Muteesa I Royal University
6. Uganda College of Commerce, Aduku	6. Jimmy Sekasi Institute of catering
7. Uganda College of Commerce, Soroti	7. Kabarole College of Commerce
8. Uganda College of Commerce, Kabale	8. Rwenzori College of Commerce
9. Uganda College of Commerce, Pakwach	9. YMCA
	10. YWCA
	11. Buganda Royal Institute of Business and Technical Education
	12. Celak Vocational College
	13. Victoria Business Institute, Tororo
	14. Shoa Institute of Hotel Management and Business studies
	15. African College of Commerce, Kabale
	16. Tourism and Hotel Training Institute, Kabale
	17. CCP Vocational Training, Mbale
	18. Nile Vocational Institute, Buikwe
	19. Maecora Youth Centre, Arua
	20. Flamingo Vocational Training Centre, Arua
	21. African International Christian Ministry Vocational Training Centre
	22. Father Bodewig Technical Institute, Jinja
	23. Tubalera Kawuma Vocational Centre

Source: UNDP (2013) *Assessment of the Tourism Human Resource Capacity in Uganda*

Institutions Offering Tourism and Hospitality Programmes by Category

Universities	Business Schools	Vocational Institutes	Tourism and Hospitality Schools
1. MUK	1. UCC Tororo	1. YMCA	1. HTTI
2. MUBS	2. UCC Kabale	2. YWCA	2. UWTI
3. Kampala International University (KIU)	3. UCC Soroti	3. Buganda Royal Institute of Business and Technical Education	3. Jimmy Sekasi Institute of Catering
4. Nkumba University	4. UCC Aduku	4. Celak Vocational College	4. Tourism and Hotel Training Institute, Kabale
5. Kampala University	5. UCC Pakwach	5. CCP Vocational Training, Mbale	
6. Kabale University	6. Kabarole College of Commerce	6. Nile Vocational Institute, Buikwe	
7. Muteesa I Royal University	7. Rwenzori College of Commerce	7. Maecora Youth Centre Arua	
	8. Victoria Business Institute Tororo	8. Flamingo Vocational Training Centre, Arua	
	9. Shoa Institute of Hotel Management and Business studies	9. African International Christian Ministry Vocational Training Centre	
	10. African College of Commerce, Kabale	10. Father Bodewig Technical Institute, Jinja	
		11. TubaleraKawuma Vocational Centre	

Source: UNDP (2013) Assessment of the Tourism Human Resource Capacity in Uganda

Institutions and Qualifications they award

Course	Qualification	Training Institute
Hospitality Management	Post Graduate	MUBS, KIU, Nkumba University, Kampala University, Kabale University, Muteesa I Royal University
Tourism Management	Post Graduate	MAK, MUBS, KIU, Nkumba University, Kampala University, Kabale University
Hospitality Management	Undergraduate	MUBS, KIU, Nkumba University, Kampala University, Kabale University
Tourism Management	Undergraduate	MAK, MUBS, KIU, Nkumba University, Kampala University, Kabale University
Hospitality Management	Diploma, Certificate	MAK, MUBS, KIU, Nkumba University, Kampala University, Kabale University HTTI, Jimmy Sekasi, Buganda Royal Institute of Business and Technical Education, Celak Vocational College, Father Bodewig Technical Institute, Jinja, TubaleraKawuma Vocational Centre
Tourism Management	Diploma, Certificate	MAK, MUBS, KIU, Nkumba University, Kampala University, Kabale University HTTI, Jimmy Sekasi, UWTI
UDHIC	Diploma	UCC – Aduku, Soroti, Toror, Kabale, Pakwach
Catering	Diploma, Certificate	YMCA, YWCA
Tour and Travel	Diploma, Certificate	HTTI, Jimmy Sekasi, UWTI, Kabale University
AITA	Diploma	Career Institute
Food Production	Diploma	HTTI, Jimmy Sekasi
Food and Beverage Service	Diploma	HTTI, Jimmy Sekasi
Front office	Diploma	HTTI, Jimmy Sekasi
House keeping	Diploma	HTTI, Jimmy Sekasi,

Source: UNDP (2013) Assessment of the Tourism Human Resource Capacity in Uganda

Appendix 3

NATIONAL HISTORIC SITES & MONUMENTS IN UGANDA

KEY HISTORICAL SITE: Commemorating a period in history

MONUMENT: Commemorating an event in history

No	Site Name	District	Description	Ownership/ Category
1	Kasubi Tombs	Kampala	Buganda Kings Royal Tombs	UNESCO WH Site, Monument/ Historical
2	Nyero	Kumi	Rock paintings	UNESCO Tentative List, Archaeological
3	Mukongoro	Kumi	Rock painting/gongs	UNESCO Tentative List, Archaeological
4	Dolwe Island(Lolwe)	Namayingo	Rock paintings /gongs, carpules	UNESCO Tentative List, Archaeological
5	Kakoro	Palisa	Rock painting	UNESCO Tentative List, Archaeological
6	Komuge	Bukedea	Rock paintings	UNESCO Tentative List, Archaeological
7	Kapir	Ngora	Rock paintings	UNESCO Tentative List, Archaeological
8	BigoByaMugenyi, Ntusi Mounds and Bwogero Basin	Sembabule	Earthworks/mounds/basin	UNESCO Tentative List, Archaeological
9	Kibiro Salt Gardens	Hoima	Traditional salt working village	UNESCO Tentative List, Historical/ archaeological
10	Kanamuget / Kanasumet	Moroto	Rock paintings	GOU, Archaeological
11	Nsongezi rock shelter	Isingiro	Early to Late Stone Age settlements	GOU, Archaeological
12	Magosi I	Kotido	Rock paintings, late stone age site	GOU, Archaeological
13	Magosi II	Moroto	Rock paintings, late stone age site	GOU, Archaeological
14	Entebbe Hippo Bay	Entebbe	Early settlement site	GOU, Archaeological
15	Kantsyore Island	Isingiro	Early settlement site	GOU, Archaeological
16	Tanda Pit Shafts	Mityana	Old mining pit shafts	Buganda Kingdom, Archaeological / Ritual
17	Munsa Earthworks	Kibaale	Earthworks, Rock shelters, traditional shrines	GOU, Archaeological
18	Fort Patiko	Gulu	1872	GOU, Monumental/Historical
19	Fort Dufile	Moyo	1874	GOU, Historical
20	Fort Wadelai	Nebbi	1876	GOU, Historical
21	Fort Katasiha	Hoima	1894	GOU, Historical
22	Fort Lugard	Kampala	1890	GOU, Historical
23	Fort Portal	Kabalore	1893	GOU, Historical
24	Bweyorere	Isingiro	Capital site of Abagabe of Nkore, 17/18C	GOU, Archaeological
25	Kigezi Memorial	Kisoro	Monument of 1910 where the Agreement on the boundary demarcation of Uganda & Rwanda was signed (British and Belgians)	GOU, Historical

26	Rubaga Cathedral	Kampala	Catholic Cathedral	Kampala Arch-dioceses Monument
27	Namirembe Cathedral	Kampala	Anglican Cathedral,1913	Namirembe Dioceses Monument
28	Uganda Museum	Kampala	Oldest Museum in East Africa,1908	GOU, Historical
29	Basiima House	Kampala	Historic Building,1904	Buganda Kingdom, Monument
30	Constitutional Square	Kampala	2nd World War Memorial,	GOU, Monument.
31	Kibuli Mosque	Kampala	Seat of the Muslim faith	Uganda Muslim Supreme Council
32	Kololo Ceremonial Grounds	Kampala	Commemoration of Uganda's Independence/ HerosSquare	GOU,Monument
33	Njeru	Buikwe	Site where Speke sighted the Source of Nile	GOU, Historical
34	Kangai	Dokolo	Monument where Mwanga/Kabalega were captured 1899 by the colonialists	GOU, Historical
35	Villa Maria	Masaka	First Catholic Church & brick house,1891	Masaka Archdioceses, Monument
36	Kyando, Memorial	Mayuge	Memorial to the killing of Bishop Hanington in 1885	GOU, Monument
37	Independence Monument	Kampala	Statue representing Independence of Uganda (Mother & Child), 1962	GOU, Monument
38	Natete Church	Kampala	First site of the arrival of CMS missionaries in the country1890s (Mackay)	Church of Uganda, Monument
39	Kigungu	Wakiso	Catholic landing, 1879 (Lourdel & Amans)	Kampala Archdioceses, Monument
40	Namugongo Matyrs Shrines	Wakiso	In memory of Uganda Martyrs of 1885-86	Kampala Archdioceses/ Church of Uganda, Monument
41	Nakayima Tree	Mubende	Last Cwezi Capital	GOU, Archaeological/ Ritual
42	Lake Katwe	Kasese	Volcanic crater lake associated with salt production	GOU, Archaeological
43	Sipi Falls, Mise Cave	Kapchorwa	Falls, caves	GOU, Archaeological
44	Napak Volcanic Mountain	Napak	Oldest paleo-anthropological site on the evolution of man, 20m years old	GOU, Paleontological
45	Bulange	Kampala	Royal seat of the3 King of Buganda	Buganda Kingdom, Monument/Historical
46	Karambi Tombs	Kabarole	Burial site of the Kings of Toro	Toro Kingdom, Monument
47	Kamuswaga Tombs	Rakai	Burial site of the King of Kooki	Kooki Kingdom, Monument
48	NaggalabiBuddo	Wakiso	Coronation Site for Buganda Kingdom Kings	Buganda Kingdom, Historical
49	AmaberegaNyinamwiru	Kabarole	Cwezi legends, Mother of Ndahura	Private, Archaeological
50	Katereke	Wakiso	Prison ditch for Buganda Prince & princesses	Buganda Kingdom, Historical
51	Nkokonjeru	Mbarara	Royal Tombs of the Abagabe of Ankole	GOU, Historical
52	Mparo	Hoima	Royal Tomb of Abakama of Bunyoro	Bunyoro Kingdom, Monument
53	Wamala	Wakiso	Royal Tombs for Buganda 1856 (Sunna II)	Bunyoro Kingdom, Monument
54	Lotuturu Hills	Kitgum	Hot springs and Caves	GOU, Archaeology
55	Balonyo Memorial	Lira	300 people massacred in 2004	GOU, Monument
56	Pabbo Camp	Amuru	Memorial, 1 st IDP and Largest Camp	GOU, Historical

Source: MoTWA, Department of Museums and Monuments

APPENDIX 4 ADVERTISING COSTS

Costs of Advertising in the Ugandan Media

ITEM	UNIT COST	TOTAL COST	FREQUENCY	TIME FRAME
Television				
Talk shows(4TV stations)	1,825,000/=	51,100,000/=	7 times	July-December
Radio(4)				
Radio Talk show	985,000/=	15,760,000/=	Once every month	JULY-OCTOBER
Radio Sweepers adverts	@ 30,000/=	12,000,000/=	5 times a day	July-OCT & DEC
ROS adverts on Radio	@250,000/=	250,000/=	Once	July-December
Newspapers(2)				
Supplementary	5,655,000/=	22,620,000/=	Half page-2 times @ newspaper	September and November
Tourism feature in Sunday Magazine	3,326,000/=	6,452,000/=	2 times	July -December
School Outreach Program				
Trip for winning children from the quiz	4,000,000/=	16,000,000/=	once	September
Fuel for distribution of materials	870,000/=	3,480,000/=	Multiple times	July-November
Quiz price	1,000,000/=	1,000,000/=	once	September
Total		128,662,000/=		

Source: UTB

Cost of Advertising in a Specialist Magazine in the UK



Publishing Dates for 2013/14

Sept/Oct 2013, No 107:
On sale 27th August
Copy deadline 1 August

Nov/Dec 2013, No 108:
On sale 27th October
Copy deadline 1 October

Jan/Feb 2014, No 109:
On sale last week of Dec
Copy deadline 1 Dec

Mar/Apr 2014, No 110:
On sale 27th February
Copy deadline 1 February

May/June 2014, No 111:
On sale 28th April
Copy deadline 1 April

July/Aug 2014, No 112:
On sale 28th June
Copy deadline 1 June

Advertising Rates

Display Advertising:
20% off on 5 issues
Full page print mag: £1,300
Full page print position: £1,300
Half page: £650
Quarter page: £325
 Eighth page: £162.50

Online Advertising:
For details and rates of advertising on our website please see page 3.

DISCOUNTS:
50% on 5 issue booking & 20% on 4 issue booking

Classifieds:
From £250 per annum
Directory listing: £150
For information call: 01789 450000

Inserts and Sponsorships:
Starts: 1,457,000
Sponsorship: PGM

Advert Sizes and Type Area

PLEASE NOTE: all sizes below are given in millimetres, height x width
DPS trim: 207 x 426, bleed: 303 x 426, type area: 275 x 391
Full page trim: 207 x 276, bleed: 303 x 276, type area: 275 x 187
Half page vertical trim: 207 x 141, bleed: 303 x 141, type area: 275 x 83
Half page horizontal trim: 141 x 276, bleed: 303 x 276, type area: 138 x 187
Quarter page: 135 x 90
Quarter page vertical strip: 275 x 43
 Eighth page: 66 x 90
 Classified: 1 column: 304 x 2
 Classified: 2 columns: 304 x 90

Contact:
Display: Vicki Neal - 01789 450000, vicki@atmagazine.co.uk
Classified: Alex Johnson - 01789 450000, alex@atmagazine.co.uk

'The most positive growth performance over the past four years in any outdoor magazine' OCC MAGAZINE

Other information

Credit Terms:
Invoice to 30 days of invoice.
Series of classified adverts possible in advance. All prices subject to VAT. Cheques/certs to pay at time of booking.

Commission:
Agency commission is 10%.

Contact:
Display: Vicki Neal - 01789 450000, vicki@atmagazine.co.uk
Classified: Alex Johnson - 01789 450000, alex@atmagazine.co.uk

Publishing Information

Adventure Travel is:
The UK's leading and longest-running outdoor travel magazine targeted at all outdoor enthusiasts. It's not an adventure sports magazine nor a technical climbing/mountaineering magazine, but the mainstay of the editorial which is tightly focused on achievable goals. Editorial focus also includes a full range of outdoor and adventure sports such as walking, mountain biking, cycle touring, kayaking, canoeing, sea kayaking, climbing, scrambling, skiing and snowboarding, ski-touring, ultra-marathon, cycling, adventure racing, trail running and more. Destinations include the UK and Europe as well as the rest of the world. We also feature outdoor kit and expert advice as well as interviews, events and more.

Reader Demographics:
Affluent (90% ABC1), over 40s - female only, active females, all ages (average 31-40), active and travel all year round, magazine for new product and always looking for new ideas. 80% keep their magazines for reference and 80% say they don't read another outdoor magazine.

Key reader interests are: where to go, what to do, who to go with, when to go, what to take, the environment, health, insurance, fitness, fitness, flights + transport, water, food, cost, equipment, gear.

Specifications:
Frequency: 6 issues per year
Cover Price: £3.99
Free run: 100,000
Reader per copy: 3-4
Readership print/digital combination (approx): 100,000
Online: 276,406 unique visits in June 2013
 £570
Export: Smartphone, Tablet, Android
Subscriptions: 4,166
Digital issue: 1,500
Social media: 1,500

Website:
www.adventuretravelmagazine.co.uk is regularly updated with news, gear reviews, interviews and outdoor travel features from the UK and around the world.

Distribution:
Wholesale: Whitbread Travel, Merton W&A's, Waterstones throughout the UK.

Webstats:
The website received 276,406 unique visits in June 2013, which represents a significant increase since the digital version was made available.

To book Display contact Vicki: 01789 450000 vicki@atmagazine.co.uk

To book Classified contact Alex: 01789 450000 alex@atmagazine.co.uk

Appendix 5

SALES MANUAL STRUCTURE AND CONTENT

The sales manual should have the following structure and content:

- a map on the inside folding flap giving an initial overview of the location of attractions in Uganda;
- a welcome message from the Minister of Tourism or a prominent tourism stakeholder from Uganda;
- an introduction to Uganda describing positively recent events about the sector and how tourism will develop in the near future;
- a section presenting tourism statistics, studies and reports on tourism in Uganda;
- detailed information on the attractions, culture, people, architecture, historical villages, religious and archaeological sites found in the country;
- a description of the main shopping and entertainment venues in each tourism centre in the country such as malls, restaurants and bars, and nightclubs with contact addresses;
- an overview of the structure of the industry and what can be realistically expected;
- a comprehensive list of accommodation options in Uganda with location, quality rating, number and types of rooms, amenities and facilities, access and parking, Internet access and Wi-Fi, and contact details;
- a list of local tour operators with contact details and the type of products they offer; ground handlers; airport representation companies; and tour guide agencies and/or individual guides;
- information on transport to Uganda and around the country and a listing of firms that hire vehicles and drivers;
- the contact details of Tourist Information Centres around the country;
- detailed practical information at the destination which must include: climate and tourist seasons, public holidays; money issues (currency exchange, banks, ATMs); business environment (hours, practices and so on); general information (i.e. tipping; taxis; insurance; hospitals and medical facilities);
- a section on festivals, events and meetings for the year with contact and booking details;
- dates for scheduled familiarisation trips, road shows, attendances at trade fairs where operators and agents can meet Uganda service providers and the UTB;
- an official high quality photo library held at the UTB offices or online for registered users to download; and
- A section on tourism administration, plans and tender opportunities in Uganda.

Appendix 6

STRUCTURE OF INTERNSHIP PROGRAMME

Internship placements should be at least 46 working weeks, commencing any time between July and September following the conclusion of the second year of academic study, and finishing the following summer. Students have the freedom to apply for the placements that interest them, the institute facilitates the process. The institute should build up close relationship with employers and sets up a database. These should be advertised to students who apply to the places of their preference. Student should also be able to arrange their own placement with an employer not featured on the list, but any such placement can only go ahead with prior approval from the institute. Detailed support and guidance on the process of finding and securing a placement is to be provided via the Internship Orientation programme during the second year of study. There should be no limit on the size or nature of the organisation, provided the role itself provides the opportunity to gain relevant management experience.

Institutions should strive to support the principle of paid placements, and should only approve an unpaid placement in very specific circumstances. If possible, placements should offer a salary at the current market rate. Overseas placements should be allowed. Students should be able to go anywhere, provided the role is suitable, the destination is deemed safe and proper supervision from the institute can be ensured through either personal visit or regular Skype (or similar) meetings.

The placement should be assessed through a written business report plus performance reports from the employer and academic tutor. Students on placement will be assigned an academic tutor for the year, who will be contactable throughout the year to provide guidance and support. Students should also have 3 (personal or Skype) meetings with their tutor during the year, preferably at the place of work.

APPENDIX 7

UNWTO PROJECT TEAM

The Tourism Development Master Plan was drafted between mid-June and mid-August 2013 by the following team of technical experts, assembled by the UN World Tourism Organisation (UNWTO):

Team Leader & Chief Technical Adviser	Mr Roger Goodacre
Human Resources Development	Dr Edith Szivas
Institutional and Regulatory Reform	Mr Jim Flannery
Marketing, Branding, Community Involvement	Mr Lionel Becherel
Physical Planning inc. Demonstration Projects	Mr Jim Jessamine
Infrastructure Development	Mr Peter Whitehead
Tourism Finance & Economics	Mr Charles Blair
National Legal expert (seconded)	Mrs Jackie Akunyo

At UNWTO Headquarters, the project was technically and logistically managed by:

Director, Technical Cooperation and Services	Dr Harsh Varma
Programme Officer	Ms Vanessa Satur

Appendix 8

TECHNICAL ADVISORY COMMITTEE (TAC) MEMBERS

Please provide names







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