



Uganda Tourism

POLICY 2015



Foreword

Uganda is endowed with a favorable climate all year round, an attractive location and geographic attributes coupled with a diverse cultural setting and heritage. This rich assemblage of attractions gives Uganda a rich and competitive tourism appeal.

Globally tourism is one of the world's fastest growing industries with a strong multiplier effect for the rest of the economy. In Uganda, tourism has increasingly become a major contributor to economic growth, empowerment and government revenue.

The importance of Tourism in Uganda has become recognized in the Uganda Vision 20140 and the National Development Plan. Tourism is regarded as a key driver to social economic transformation of Uganda.

Addressing the need to capitalize on the potential of tourism, the sector initiated a review and update of the policies and plans to match the current trends and to address the binding constraints to growth.

This policy document reviews the situation, identifies the key growth constraints of the sector and outlines the framework and strategies that will guide the growth of the sector to enhance competitiveness of the destination while mainstreaming the principles of inclusiveness and sustainability.

I would like to extend my gratitude to our global partners, the United Nations Development Programme and the United Nations World Tourism Organization for the technical support and the various stakeholders for the invaluable contribution to the document.

I call upon all stakeholders to embrace the vision and strategies described in this Policy to guide and develop our tourism industry.



Hon. Dr. Maria Mutagamba
Minister.

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LIST OF ACRONYMS

| | | | |
|---------------|--|----------------|---|
| AUTO | Association of Uganda Tour Operators | PRESTO | Presidential Initiative for Sustainable Tourism |
| CICS | Competitiveness and Investment Climate Strategy (MoFPED) | TCC | Tourism Co-ordination Committee |
| COBATI | Community Based Tourism Initiatives | TDMG | Tourism Development Management Group |
| DMO | Destination Management/Marketing Organisation | TIMS | Tourism Information Management System |
| FIT | Foreign Independent Traveler | TTCI | Travel and Tourism Competitiveness Index |
| GDP | Gross Domestic Product | TUGATA | The Uganda Association of Travel Agents |
| EAC | East African Community | UBOS | Uganda Bureau of Statistics |
| EU | European Union | UCOTA | Uganda Community Tourism Association |
| HTTI | Hotel and Tourism Training Institute | UGX | Ugandan Shillings |
| IGO | Inter-Governmental Organisation | UHFTAWU | Uganda Hotels, Food, Tourism and Allied Workers' Union |
| MICE | Meetings, Incentive Travel, Conferences and Exhibitions | UIA | Ugandan Investment Authority |
| MOFPED | Ministry of Finance, Planning and Economic Development | UNDP | United Nations Development Programme |
| MOJCA | Ministry of Justice and Constitutional Affairs | UNRA | Ugandan National Roads Authority |
| MOLG | Ministry of Local Government | UNWTO | United Nations World Tourism Organization |
| MOTWA | Ministry of Tourism, Wildlife and Antiquities | USAGA | Uganda Safari Guides Association |
| NDP | National Development Plan | UTA | Uganda Tourist Authority and Uganda Tourism Association |
| NFA | National Forestry Authority | UTB | Uganda Tourist Board |
| NPA | National Planning Authority | UWA | Uganda Wildlife Authority |
| NGO | Non-Governmental Organisation | UWEC | Uganda Wildlife Education Center |
| NP | National Park | UWRTI | Uganda Wildlife Research and Training Institute |
| NTO | National Tourist Office | VFR | Visiting Friends and Relatives |
| PAMSU | Protected Area Management and Sustainable Use | WTTC | World Travel and Tourism Council |
| | | WTO | World Trade Organization |

1.0 INTRODUCTION

1.1 Background

Uganda is a country of exceptional beauty, encompassing a zone of overlap between the savannahs of East Africa and the West African rain forests. Designated by Churchill as the Pearl of Africa, Uganda is endowed with a vast array of natural and cultural attractions and a growing MICE potential.

Uganda has over 53 per cent of the world's remaining population of mountain gorillas, 7 per cent of the world's mammal species, 11 per cent of the world's bird species, and a variety of butterflies. The country has scenic mountain ranges including the snow-capped Rwenzori Mountains, Lake Victoria, the world's 2nd largest fresh water lake, Lake Bunyonyi, believed to be one of the world's deepest lake and the source of the Africa's longest river (Nile) with beautiful waterfalls and unique scenery. This presents the country with numerous tourism opportunities to stimulate economic growth and earning significant revenues from strengthening primary, secondary and tertiary tourism industries.

Tourism is the second biggest foreign exchange earner for the country contributing US\$ 1.003 Billion as of 2012. The sector accounted for 14.6 per cent of total employment in Uganda for 2011. The tourist arrivals have been increasing at an average rate of 20 per cent in the last ten years. In 2012, the international arrivals were recorded at 1.2 million visitors.

The tourism industry is expected to play a major role in the economy and become the major contributor to GDP by 2040. It will provide enormous employment opportunities directly and in related service industries and projected to earn over USD 12 billion by 2040. In addition to the direct benefits, the industry will spur the growth of the associated secondary and tertiary industries.

The overall goal of the Tourism Policy is to set the strategic objectives and broad framework for management and development of the sector by creating an environment that will encourage investment and growth necessary for socio-economic transformation of Uganda in line with the National Vision 2040.

Tourism is sometimes referred to as the visitor economy; this term is used to describe the movement and economic activity of people for every purpose other than their regular employment and normal day-to-day activity.

The words 'visitor' and 'tourist' are employed as technical descriptions with specific meanings, defined by the UN World Tourism Organization as follows:

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

1.2 Existing Policy and Legal Framework for Tourism Development in Uganda

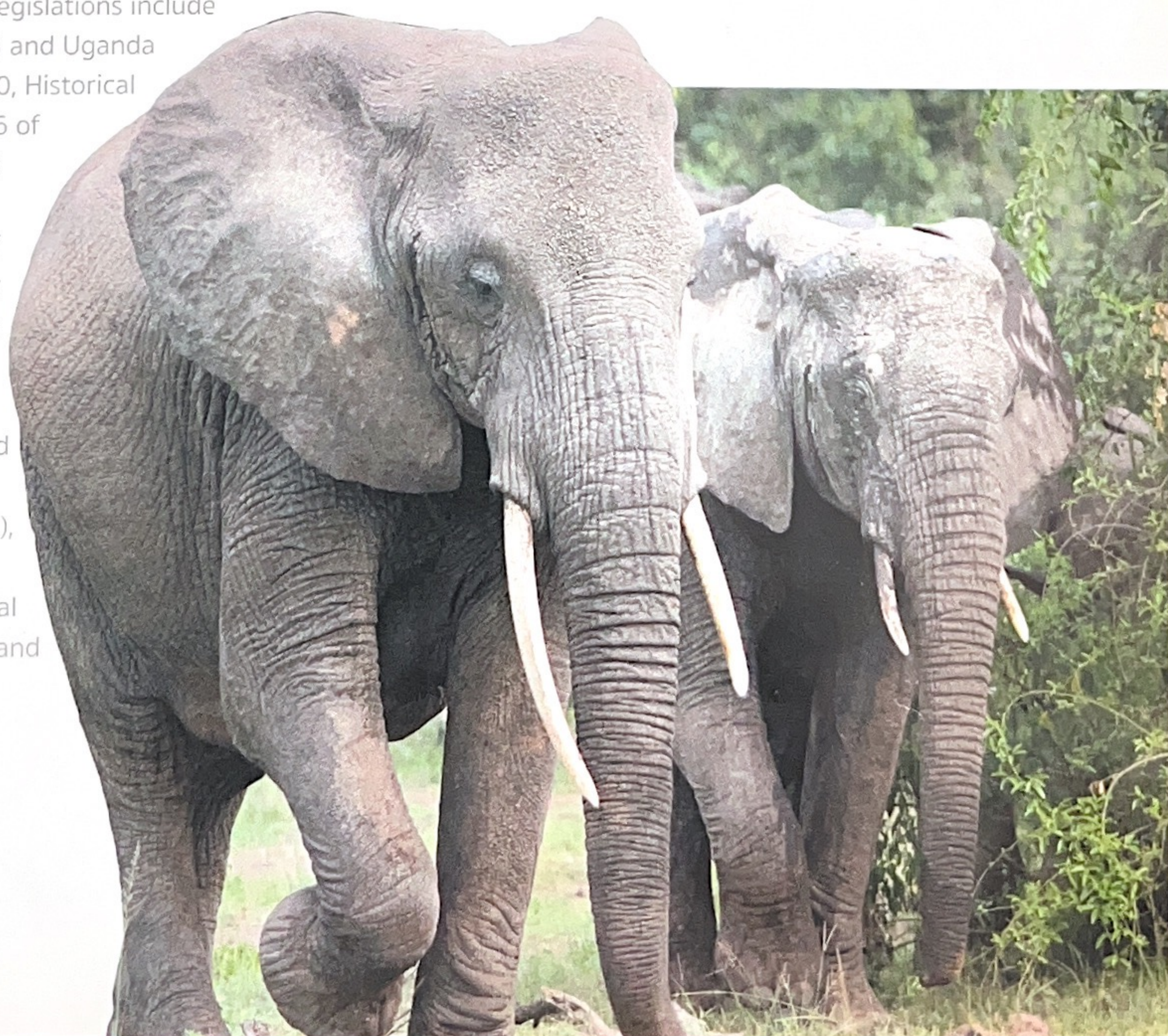
The 1995 Constitution of the Republic of Uganda provides for state protection of important natural resources such as land, water, wetlands, minerals, fauna and flora for ecological and tourism purposes on behalf of the people of Uganda under Objective XIII. It provides for creation and development of Parks, Reserves, recreation areas and conservation of natural resources by central and or Local Governments under Objective XXVII.

Tourism development is governed under the overall policy guidance of the national Constitution supported by various framework policies and laws under Uganda Tourism Policy 2003 and Uganda Tourism Act, 2008. Other relevant policies and legislations include Uganda Wildlife Policy, 2013 and Uganda Wildlife Act, Cap 200 of 2000, Historical Monuments Act 1967 Cap 46 of 2000, National Environment Policy (1994) and National Environment Act, Cap 153 of 2000, The Local Government Act (1997), National Forestry and Tree Planting Act, 2003, Oil and Gas Policy for Uganda 2008, BTVET Act and the Universities and Other Tertiary Institutions Act (2001), Uganda National Culture Policy 2006 and the Traditional Rulers (Restitution of Assets and Properties) Act of 1993.

1.3 International law

The 1995 Constitution of the Republic of Uganda sets out the principles of foreign policy objective of Uganda as (a) promotion of the national interest of Uganda; (b) respect for international law and treaty obligations; (c) peaceful co-existence and nonalignment; (d) Settlement of international disputes by peaceful means; (e) opposition to all forms of domination, racism and other forms of oppression and exploitation.

Uganda is a signatory to a number of international conventions, treaties and Agreements relating to tourism. International laws most direct and of immediate importance for tourism development to which Uganda is a member state includes UNWTO Statute of 1975 and subsequent statutes at global level and East African Community Treaty at regional scale.



2.0 THE SITUATION ANALYSIS

2.1 The Global Perspective

Over the past six decades, international tourism has experienced continued expansion and diversification, becoming one of the largest and fastest-growing economic sectors in the world. Many new destinations have emerged, challenging the traditional ones of Europe and North America.

Despite occasional shocks, international tourist arrivals have shown virtually uninterrupted growth – from 277 million in 1980 to 528 million in 1995, and 983 million in 2011. In 2012, international tourist arrivals surpassed the 1 billion mark (1.035 billion) for the first time in history, representing a growth rate of 4 per cent (UNWTO, Tourism Highlights, 2012). The number of international tourist arrivals worldwide is expected to increase by 3.3 per cent a year on average from 2010 to 2030 (UNWTO, Tourism Towards 2030, 2012).

In the past, destinations in emerging economies have grown faster than advanced economies, and this trend is set to continue in the future. Between 2010 and 2030, arrivals to emerging economies are expected to increase at double the pace (+4.4 per cent a year) of those to advanced economies (+2.2 per cent a year) (ibid).

As a result, the market share of emerging economies has increased from 30 per cent in 1980 to 47 per cent in 2011, and is expected to reach 57 per cent by 2030, equivalent to over one billion international tourist arrivals (ibid).

Over the ten years from 2010, international visitor arrivals in East Africa are forecast to grow at a rate of 6.2 per cent from 12.1 million to 22 million by 2020, and 37 million by 2030 (UNWTO, Tourism towards 2030, 2012).

2.2 The Tourism Economy in Uganda

In Uganda, tourism is an important sector of the economy, generating a valuable and growing stream of foreign revenue. In 2012, foreign visitors were estimated to be responsible for US\$ 1.003 billion of revenues (Uganda Bureau of Statistics 2012). Taking into account induced and indirect impacts, the tourism sector now accounts for around 9 per cent of GDP, amounting to \$1.7 billion (World Bank, Situational Analysis, 2012).

In the last decade, the number of foreign visitors has grown more than fourfold from 205,000 in 2001 to 945,000 in 2010 (and 1.23 million in 2012). In 2011, 76 per cent of visitors arrived from Africa, while 13.4 per cent came from Europe and 5.2 per cent from North America.

2.3 Domestic Tourism

A strong domestic market is important in providing stable demand for tourism attractions and services that may suffer from seasonal and economic fluctuations of foreign visitor markets. To ensure a sustainable future for the tourism sector, Government will take initiatives to stimulate the development of Domestic tourism.

A recent study titled “Uganda’s Domestic Market, 2013”, shows that domestic tourism is at present overwhelmingly composed of day trips to nearby local attractions. 76 per cent of travelers spend less than 12 hours away from home, and 81.5 per cent spend at most UGX50, 000 on their trip. Visitors to important cultural and wildlife institutions such as the Uganda Wildlife Education Centre (UWEC) and the Uganda Museum in Kampala are predominantly domestic, but the largest proportions of these visitors are school groups and students.



Nevertheless, the economic impact is estimated to generate up to US\$187 million (according to the UNDP study) and offers excellent growth potential and entrepreneurial and job creation opportunities.

Achieving significant growth will involve researching and adapting or developing the type of attractions and activities that are capable of attracting the domestic visitor, which may be very different from what appeals to the foreign market. Visitation of Ugandans to National Parks (NP) and staying in NP accommodation facilities is constrained due to a shortage of suitable transport into the Parks, prices that are not adapted to the local market, and a general lack of awareness of Uganda's wildlife and natural resources. To ensure a sustainable future for the tourism sector, concerted initiatives need to be taken to stimulate its development. Government will create awareness on the available tourism opportunities for the domestic market

2.4 Tourism Planning and Funding

Tourism is recognized by Government in the National Vision 2040 and the National Development Plan 2010/11-2014/15 as one of the nation's primary growth sectors. In the NDP, Hotels and Catering are forecast to be the country's fastest growing sector at +26.5 per cent in 2010/11 and declining to +18.4 per cent in 2014/15.

Listed among the investment priorities for the five year period of the Plan is tourism infrastructure, specifically roads, hotels and restaurants in tourist areas. Other priority areas for intervention that may assist tourism development are transport infrastructure, energy and Information and Communication Technology (ICT). However, owing to the limited resource envelope, the funding provided to the tourism sector has not matched the funding foreseen in the National

Development Plan.

In 2011, in recognition of its enhanced status, tourism was separated from trade and industry and given its own autonomous Ministry (Ministry of Tourism, Wildlife and Antiquities).

The current tourism promotion budget is limited and insufficient to allow for a meaningful scope for promotion of Uganda in the markets that produce greatest returns. The areas that require increased investment in tourism include; capacity building, product development and destination marketing.

2.5 Raising the Awareness of Tourism

Whereas Tourism is recognized as a key sector in the National Development Plan, the awareness of its capacity to create employment and entrepreneurial opportunities and to generate substantial economic and social benefits, including in remote disadvantaged communities, is still limited. Government will pursue a continuous campaign of information and awareness creation among all stakeholders of the actions that will stimulate or stifle growth in the tourism sector.

There is limited awareness of tourism's benefits and inclusiveness of local communities adjoining Protected Areas, where livelihoods are negatively affected by the human wildlife conflicts. Government will address these issues and in addition, initiate and sustain measures to increase awareness and provide training in tourism skills and entrepreneurial management to benefit these communities.

Government will promote initiatives to raise the appreciation of Uganda's natural and cultural assets by the general public, and focus on the school going generation to inculcate a culture of tourism.

2.6 The Potential for Growth

The potential for market growth – notably in the high-value wildlife/safari, conference, and events subsectors, and niche activities including water and adventure sports - is substantial.

In terms of its tourism product, Uganda possesses quite exceptional natural assets and is unique in being home to the Big Five, the mountain gorilla and the chimpanzees. The gorillas are the iconic attraction primarily responsible for attracting the high-spending visitors.

Uganda also boasts of the source of the Nile, beautiful lakes, Africa's highest mountain range- the Rwenzori Mountains, and one of the world's biggest varieties of bird and butterfly species, together with a climate that is exceptionally well suited to tourism all year round. Most of these assets are under-exploited, as is its history and cultural heritage. In recent years, a thriving international conference and meetings market has developed, creating a promising high-value revenue stream.

Since 2001, when a gross total of 205,000 foreign tourists were recorded, the number of foreign leisure tourists has grown very slowly, the result of inadequate promotion in Uganda's main source markets (UNWTO, 2012).

2.7 Challenges and Rewards

Generating tourism growth in Uganda will depend on finding solutions to a number of major challenges. It requires substantial investment in essential infrastructure, capacity building and sustained marketing, with strong leadership supported by efficient collaboration between government departments, central and local government, and increased co-ordination among all stakeholders.

In addition to a substantial increase in foreign revenues, a thriving tourism sector will create enterprise opportunities and linkages in economically deprived areas, facilitate socio-economic development and help fund the protection and conservation of Uganda's rich natural and cultural heritage.



3.0

PERFORMANCE OF THE NATIONAL TOURISM POLICY 2003

Since the publication of the National Tourism Policy in 2003, visitor arrivals and tourism revenues in Uganda have grown significantly, much faster than forecasted. A review of future policy and strategy was therefore clearly needed in order to build on the progress made, taking into account of the changing economic environment and preparing for new challenges.

In the 2003 Tourism Policy, tourism's primary purpose was seen as a vehicle for poverty reduction, gradually spreading wealth via economic linkages to communities around the country.

The Policy forecasted market growth over the following ten years from around 200,000 to 500,000 foreign arrivals and of the high-spending leisure visitor market segment from approximately 20,000 to 100,000 arrivals. Tourism revenues were expected to increase to US\$360 million by 2011.

Total foreign arrivals in 2010 quadrupled to 945,000, and revenues were more than twice the 2003 forecast. The high-spending leisure market grew to 149,000 arrivals more than estimated 100,000 in 2010.

The Policy strongly advocated for the development of niche products in order to meet the needs of niche tourism markets, in particular eco-tourism, agro-tourism and community-based initiatives.

The marketing strategy recommendations also proposed a focus on niche markets in preference to the mainstream wildlife market. Despite the Policy recommendations, little investment in eco- and agro-products has taken place subsequently, and only a very small number of Community Based initiatives have been achieved.

The Policy also called for investment in protecting and developing Protected Areas, for the regulation of wetland use, the implementation of management plans

and the Forest Policy 2001, support for the Uganda Wildlife Education Centre (UWEC), the Wildlife Clubs of Uganda (WCU), and the Uganda Wildlife Society. Development should be concentrated on designated Tourism Focal Points, and draw on Uganda's 'unique natural and cultural resources'. Some of these policies and management plans have been pursued; however, more effort is needed to fully achieve these policy objectives.

The necessity to improve tourism skills was strongly emphasized, but few of the practical recommendations have been implemented. The flagship training institution, HTTI, is yet to be refurbished and upgraded.

Uganda's cultural heritage was seen to form 'an essential element in the promotion, marketing and product development of Uganda. The number of thriving cultural heritage products is still very limited and needs further development.

Government investment in marketing the destination was too limited to fund the activity needed, and a tourism levy was therefore proposed. The Tourism Levy foreseen in the Uganda Tourism Act is yet to be implemented.

The Policy suggested that the marketing functions of UTB should gradually be assumed by the private sector Uganda Tourism Association (UTA). Foreign missions were expected to support UTB promotions and information distribution.

There was 'a lack of sufficient resources at UTB' and insufficient collaboration between UTB, UTA and UWA in product development and marketing. The Policy identified the key growth markets as 1) niche markets, 2) 'mainstream tourists' (i.e. foreign leisure/wildlife tourists), 3) regional markets including South Africa, 4) and the domestic market.

Since 2001, the foreign leisure/wildlife segment has grown at a slow pace, but it is responsible for a very high proportion of tourist expenditure, whereas niche markets have also developed slowly.

Although its size, characteristics and economic impact were unknown, the domestic market was declared to be important because it was seen as less susceptible to fluctuation than foreign markets, although its size, characteristics and economic impact were unknown. It was acknowledged that Ugandan citizens showed limited interest in visiting the National Parks (in part because of transport difficulties, high prices, etc) and in staying in NP accommodation. The key segment of the domestic market was the foreign residents, who were the main visitors to the National Parks. The largest segments of the foreign leisure market were backpackers and overlanders.

The principal constraints on tourism growth were seen as the lack of security, the poor image of Uganda, the limited capacity of public and private sector institutions, responsibility for tourism being allocated to a Ministry with a much wider remit, and a fragmented private sector. Today, security is no longer a major concern, and tourism has its own Ministry, but the problems of image, capacity, and fragmentation of the private sector persist in different degrees.

The exclusion zones in some of the concessions offered by UWA are proving to be a significant impediment to growth, and are partly accountable for the modest

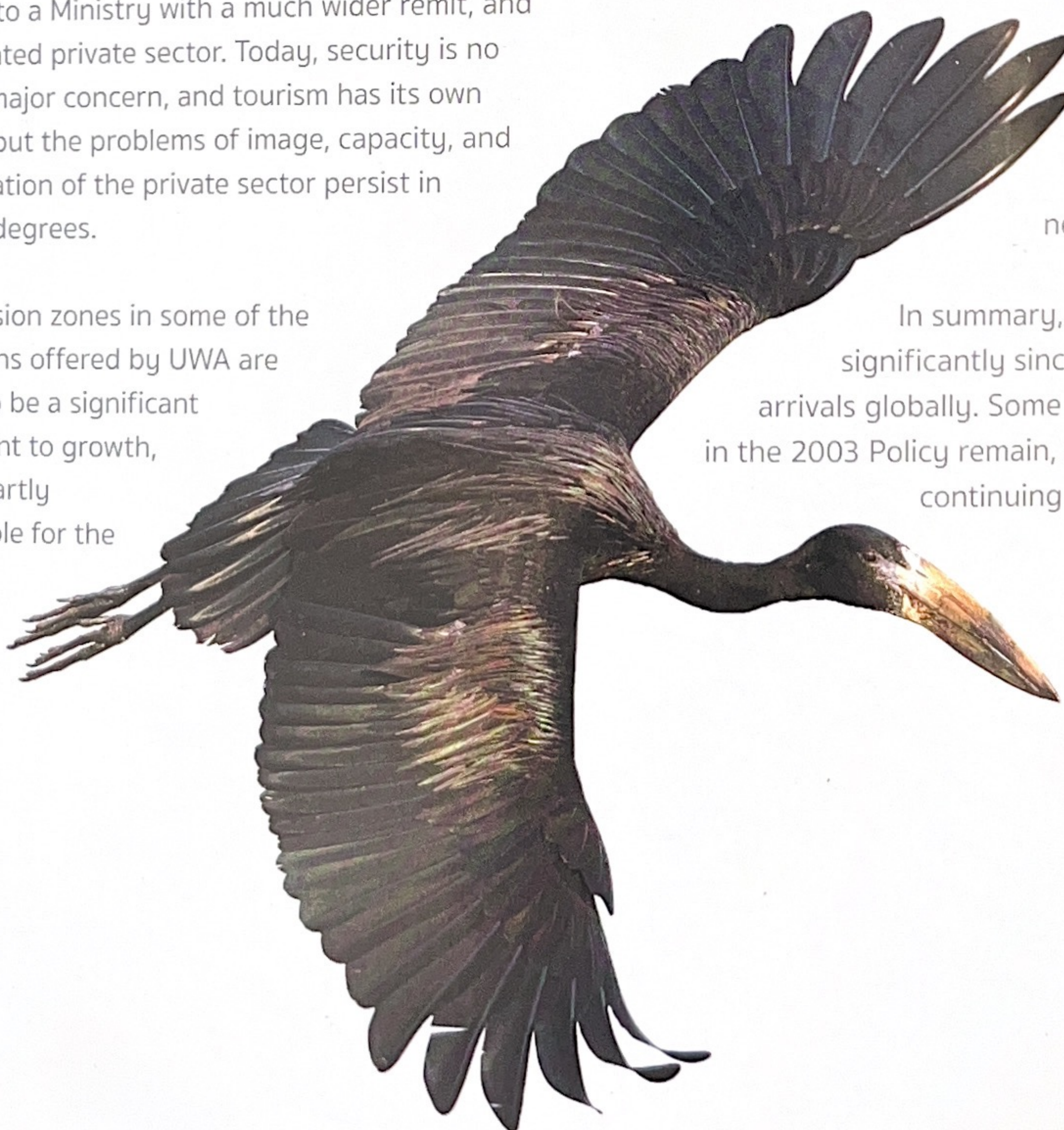
investment and visitor numbers in the affected National Parks. Government will further pursue renegotiation of these exclusion zones.

Easy accessibility by road and public transport to tourism areas and products was stated to be crucial, and government investment in transport infrastructure was essential. In 2013, the poor state of the infrastructure is still one of the major impediments to growth of the high-value leisure market and after consolidating security, Government has now embarked on infrastructure development.

The Policy called for a zero rate of VAT on tourism, which should be designated an export industry, with import duty exemptions on certain items of tourism equipment. This was largely achieved in addition to waiving taxes on tourism vehicles. These policies need to be further pursued to attract more investment in the sector.

Policies on improving data collection (visitor arrivals, occupancy rates, etc), tourism awareness initiatives, quality assurance, and environmental protection have been largely implemented but more effort is needed.

In summary, tourism has grown significantly since 2003, as have tourism arrivals globally. Some constraints identified in the 2003 Policy remain, and may restrict continuing growth.



4.0 THE SWOT ANALYSIS

4.1 The Strengths and Weaknesses of the Tourism Sector

4.1.1 Key Strengths

- Existence of unique wildlife diversity including Mountain Gorillas, the chimpanzee, Golden monkey, high diversity of bird and butterfly species.
- Scenic landscapes including mountains like Rwenzori, Virunga and Elgon; water bodies including the source of the Nile and the second world's largest fresh water lake (Lake Victoria), waterfalls and rapids along the River Nile, Lake Bunyonyi, believed to be Africa's second deepest lake; the western arm of the great East African Rift Valley and the Kazinga channel
- Unique savannah and tropical rainforest Protected Areas including National Parks, Wildlife Reserves, Central Forest Reserves, Ramsar Sites and Important Bird Areas (IBAs)
- Pleasant all year round tropical climate with temperatures ranging from 15 to 30 degrees Celsius.
- A hospitable people with diverse and unique culture including a rich cuisine, arts and crafts, dance, fashion, a big number of Kingdoms and chiefdoms.
- Existence of historical sites and monuments including Bigobya mugenyi; Mparo, Kasubi, Kamukuzi, Mparo and Karambi royal tombs; Nyero rock art, Namugongo Martyrs shrine; the Bahai Temple.
- World heritage sites like Kasubi tombs, Bwindi Impenetrable Forest and Rwenzori Mountains and Man and Biosphere reserves like Queen Elizabeth Landscape and Mount Elgon.
- Existence of a diverse range of tourist accommodation and MICE facilities catering for budget, mid-range and high end tourist market.

- Strong Political Will including enabling policy and legal framework and an elaborate institutional framework with a dedicated Ministry and various Agencies.
- An enthusiastic nascent and self-motivated private sector
- Availability of a wide range of investment incentives including 20 per cent initial capital allowance and 5 per cent depreciation rate for hotels, hospitals and industrial buildings, 25 per cent annual starter up capital spread over 4 years and tax exemption for imported tourist vehicles.

4.1.2 Key Weaknesses

4.1.2.1 Support infrastructure

- Poor road access to and between key tourist sites and international airport
- Inadequate road and air links between key tourist attractions
- Shortage of quality accommodation capacity.
- Poor public transport access to main Parks from local towns
- Inadequate energy, water and ICT facilities in key tourism sites
- Lack of international airports close to the main National Parks
- Poor signage around most tourist attractions

4.1.2.2 Planning

- Shortage of tourism expertise among local government planners
- Inadequate protection for landscapes and environmentally sensitive sites
- Lack of planned tourism zones and clusters
- Lack of protection for historic buildings and cultural heritage sites

4.1.2.3 Product

- Narrow product diversity and over-reliance on the gorilla market.
- Shortage of wildlife stock in key Protected Areas
- Limited tourism activities and infrastructure in most Protected Areas.
- Poor quality cultural heritage product
- Shortage of major events
- Poor range of quality craft and souvenir products

4.1.2.4 Human resources

- Insufficient tourism skills, especially at hotel management level
- Shortage of tourism management and marketing skills in government agencies
- Shortage of quality tourism training capacity
- Poor quality tourism training infrastructure, notably at HTTI and UWTI

4.1.2.5 Marketing

- Inadequate sustained destination marketing in key source markets
- Underfunded Uganda Tourism Board
- Insufficient niche marketing capacity (conferences, birding etc)
- Weak brand image in key international markets
- Shortage of up-to-date online information and booking facilities
- Inadequate visitor information provision and Tourism Information Centers
- Insufficient PR/communications and emergency response capacity
- High prices - uncompetitive international airfares, high regional airfares
- Weak domestic market

4.1.2.6 Tourism management and regulation

- Inadequately resourced tourism institutions
- Shortage of reliable up-to-date tourism statistics and data
- Inadequate reliable statistics collection and analysis systems and reporting requirements
- Lack of a Tourism Information Management System
- Insufficient coordination and some overlap between government agencies
- Limited tourism development awareness and expertise in local government
- Inadequate tourism regulation capacity
- Multiple national and local taxes and fees, especially for hotels
- Inadequate government funding for tourism sector
- Weak and fragmented private sector

4.1.2.7 Community involvement

- Limited awareness of tourism benefits among communities adjoining Protected Areas and other tourism areas
- Inadequate appreciation among Ugandans of their own natural and cultural Attractions

4.2 Opportunities

4.2.1 Product development potential

- Wildlife viewing activities in and around the Protected Areas (improved tracks, sanctuaries, wildlife education centers, canopy walk ways)
- Niche activities (purpose-built facilities for bird-watching, fishing, nature trails) and experiential tourism
- Water based tourism activities on lakes and rivers (island resorts, houseboats, boat cruises, ferries, rafting and sailing)
- Thematic tourism (development/interpretation of historical and cultural sites – e.g. Source of the Nile interpretation centre, Winston Churchill/ Great Explorers trails/stories, Idi Amin story etc)
- Museums and interpretation centers (redeveloped National Museum, Royal Palaces)
- Conference and meeting facilities
- Mountain tourism (trails, huts, cable-cars, mountain biking)
- Luxury lodges and mid-market hotels, including pioneering eco-friendly developments
- Craft products and markets (craft co-operatives)
- Community-based tourism (guided tours of local communities and markets)
- Events (cultural/dance/musical/fashion/sports etc, for domestic and regional markets)

4.2.2 Markets

- Luxury high-spending leisure markets
- Mid-market leisure visitors
- Regional and emerging markets (East/South Africa, Ugandan Diaspora, Gulf, Asia, etc)
- Conference and business markets
- Niche activities (bird-watching, adventure sports, fishing, spas etc)
- Faith based tourism
- Domestic tourism
- EAC and other regional collaborations on cross-border tourism

4.3 Threats

- Oil, gas and mineral exploration and production in ecologically sensitive National Parks and wildlife reserves
- Lower-cost regional competitors especially in air transport, accommodation in rural tourist attractions
- Increased investment in development and marketing by regional competitors
- Exclusion zones in key tourism sites holding back essential development
- Regional security conflicts and terrorism
- Disease outbreaks
- Unpredictable global economic outlook
- Negative media publicity and travel advisories



5.0 A VISION FOR TOURISM IN 2024

The policy vision for the tourism sector is “Uganda established as Africa’s top sustainable tourism destination.

By 2040, Uganda will offer a broad and enticing range of tourism products and activities, based on its wealth of natural assets and its rich cultural heritage. The tourism sector will have evolved into a major and sustainable source of revenue and employment across the country, thereby making a substantial contribution towards overall social and economic development.

The volume of foreign receipts will have grown at least fivefold, on the basis of reform in every area of the industry. This transformation will be delivered by concerted action among all public and private stakeholders guided by the following principles

5.1 Mission

The Mission of the Uganda Tourism Policy is “To develop and promote sustainable tourism in Uganda significantly contributing to national development”

5.2 Guiding principles

The following principles will guide the development of responsible tourism in Uganda:

- 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 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 of East Africa
- viii. Tourism development will support the economic, social and environmental goals and policies of the government

5.3 Critical success factors

For Uganda to achieve its vision for tourism, a number of key conditions must be met, as identified below:

- i. Sustainable environmental management practices
- ii. Involvement of local communities
- iii. A safe and stable tourism environment
- iv. Globally competitive practices, by offering quality services and value for money
- v. Innovative and responsive to customer needs
- vi. Focus on product enhancement and emphasize diversity
- vii. Effective tourism training, education and awareness
- viii. Creative and aggressive marketing and promotion
- ix. Strong economic linkages with other sectors of the economy
- x. Appropriate institutional structures
- xi. Appropriate supportive infrastructure
- xii. Data driven decision making

6.0 POLICY OBJECTIVES

These objectives are the key elements in shaping a strategy for development of the tourism sector. They address the most significant constraints to growth by prescribing the essential measures needed to create an environment for sustainable development, and the targeted outcomes for visitor numbers and tourism receipts.

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. Promote conservation of natural and cultural heritage resources



7.0 STRATEGIES AND ACTIONS

Government of Uganda undertakes to employ the following strategies and actions to achieve the set policy objectives.

7.1 Tourism products development and diversification

1. Strengthen Protected Area management aimed at increasing wildlife diversity and abundance
2. Develop experiential nature based tourism products
3. Re introduce the extinct captivating wildlife species including the rhinos
4. Introduce new tourism activities in Protected Areas including birding, butterfly watching, canopy walks, hot air balloons among others.
5. Support public-private partnerships in wildlife and cultural heritage enterprise development
6. Open new trails and tracks with in Protected Areas
7. Develop regional wildlife education centers and museums
8. Support the development of cultural attractions in collaboration with cultural/community institutions and enterprises
9. Support initiatives to improve the design, marketing and packaging of arts, crafts and souvenirs.
10. Conserve historical sites and monuments and develop them into tourism products
11. Develop emerging tourism packages based on faith, agriculture, education, medical and historical events
12. Develop and support the Meetings, Incentives, Conventions and Events (MICE) industry including expos, carnivals, musical events, fairs and exhibitions
13. Support development of recreational and

amusement parks, theatres, public parks and entertainment facilities

14. Support establishment of water based tourism attractions and activities including boat cruises, rafting, aquaria, house boats, floating restaurants.
15. Support research to guide investment in tourism product development and diversification
16. Ensure that the integrity of natural and cultural assets is not compromised by tourism and other development activities.

7.2 Tourism infrastructure and facilities

1. Link all key tourism sites with paved roads and all-weather murram roads where appropriate
2. Develop air transport services and facilities that link all tourism development areas
3. Develop water based tourism infrastructure and services on major lakes and rivers
4. Renegotiate concession agreements with exclusive rights in Protected Areas with a view of eliminating exclusion zones
5. Develop mountaineering facilities including cable cars and zip lines.
6. Promote establishment of high quality low cost and mid range accommodation in and around key tourism development areas.
7. Support extension of energy, water and ICT facilities to all tourism development areas
8. Establish well serviced visitor stop-over facilities and tourism information centers along the tourism circuits
9. Install appropriate tourist information and signage along all tourism circuits
10. Integrate tourism development planning into physical infrastructure planning and

development at Central and Local Government levels.

11. Support extension of rail transport services and facilities to tourism development areas
12. Build and furnish a tourism house to permanently accommodate tourism sector headquarters

7.3 Promotion and Marketing

1. Develop, implement and periodically review a marketing strategy for Uganda
2. Brand destination Uganda with "Pearl of Africa"
3. Strengthen the Uganda Tourism Board to effectively promote and market Uganda as a tourism destination
4. Establish and maintain presence in key tourism source markets through destination marketing offices and Uganda's foreign missions.
5. Build and protect a positive image of Uganda as a tourism destination
6. Pursue a regional approach to tourism promotion and marketing
7. Develop and disseminate a broad range of tourism marketing collateral
8. Capitalize on emerging media platforms to market Uganda including social media, mobile applications and the internet in general
9. Support domestic and international market sales and destination awareness initiatives including trade fairs, roads shows, and familiarization and education tours.
10. Support initiatives aimed at engaging all nationals in promotion and marketing destination Uganda
11. Support tourism market research to guide promotion and marketing investment decisions

7.4 Human resource and institutional capacity development

1. Strengthen tourism and hospitality education and training in line with the needs of the sector and international best practices.
2. Ensure that training Institutions recruit personnel of the right qualifications and competence.
3. Regularly review the tourism and wildlife curricula with a view of upgrading them to international standards and harmonize courses through accreditation
4. Support the development of tourism and hospitality, and wildlife management training institutions as Regional Centers of Excellence.
5. Establish satellite tourism and hospitality training centres within the Country
6. Promote vocational training in tourism and hospitality, and wildlife management
7. Enhance tourism and hospitality skills among public and where appropriate private sector players
8. Equip public and where appropriate private sector players in the tourism sector to effectively deliver their mandates
9. Create and maintain a comprehensive Inventory of the private training Institutions involved in tourism, hospitality and wildlife management training
10. Continuously monitor and respond to the human resource capacity development needs of the sector

7.5 Tourism regulation, coordination and management

1. Review the Uganda Tourism Act 2008 to address emerging issues in the sector
2. Upgrade the Quality Assurance Division of the Ministry of Tourism, Wildlife and Antiquities into a fully fledged Department headed by the Commissioner for Quality Assurance.
3. Develop and implement regulations, standards and guidelines to ensure quality services and facilities
4. Rationalize tourism business licensing structure to enhance competitiveness
5. Establish a tourism sector coordination framework to enhance stakeholder participation in sector development
6. Establish regional tourism offices and strengthen participation of Local Governments in the development of tourism
7. Establish tourism zones and clusters to enhance tourism planning and coordination
8. Establish a Tourism Information Management System (TIMS) to enhance data collection, analysis and reporting
9. Support strengthening and reorganization of the private sector into a strong self-regulating body
10. Establish mechanisms aimed at providing sustainable financing of the tourism sector

7.6 Community involvement and enterprise development

1. Identify and Map investment opportunities for community enterprises within tourism development areas
2. Create awareness of tourism investment opportunities among the local people
3. Support the development of community group enterprises within the tourism development areas
4. Support harmonious co-existence of local people and wildlife through sustainable wildlife

utilization programmes and sharing of benefits

5. Protect and promote the integrity of indigenous community historical rights and culture
6. Support the Integration of the local communities into the tourism value chain

7.7 Safety and security

1. Develop a tourism safety and security strategy
2. Establish and promote tourism emergency reporting, response and rescue systems and acquire the necessary equipment
3. Enhance the capacity of the tourism security and safety personnel to effectively secure tourists and tourism assets
4. Strengthen coordination and collaboration of security organs operating within the tourism sector
5. Build the capacity of private sector to enhance safety and security of tourists and their property at their service points

7.8 Promotion of local, regional and global partnerships

1. Domestic and implement regional and international tourism development protocols to which Uganda is a member
2. Initiate bi lateral and multi-lateral tourism development partnerships
3. Effectively represent Uganda's interests in tourism development international agenda

8.0

POLICY IMPLEMENTATION, MONITORING AND EVALUATION

8.1 INSTITUTIONAL FRAMEWORK

In performing their respective roles, institutions under the tourism sector shall maintain good working relationships and shall consult each other to avoid conflicts and duplication of functions. The institutional arrangement below shall guide implementation of this policy.

8.1.1 The Ministry responsible for Tourism

The ministry responsible for tourism will provide the overall supervision, coordination and monitoring of implementation of the policy. The ministry shall be directly in charge of policy development, licensing, international conventions, quality assurance, monitoring implementation and evaluation of all tourism sector policies, overall sector planning, and coordination and inter- state Government link for the tourism sector.

8.1.2 Uganda Tourism Board (UTB)

As the lead agency for implementation of the tourism policy, UTB shall be in charge of tourism product development, promotion and marketing, and quality assurance. Collate and distribute tourism statistics and research to all stakeholders through a Tourism Information Management System

8.1.3 Hotel and Tourism Training Institute (HTTI)

As the lead agency for tourism and hospitality skills development, HTTI shall be in charge of tourism and hospitality training, research, consultancy and curriculum development. The Hotel and Tourism Training Institute shall work with the National Council of Higher Education to monitor the training and curriculum of the Tourism and hospitality Private Training Institutions.

All Higher Institutions of learning offering Tourism courses shall send their students to the Institute for hands on training as part of their qualifications and accreditation.

8.1.4 Uganda Wildlife Authority (UWA)

As the lead agency for wildlife management in Uganda, UWA shall be in charge of wildlife protected area management and regulation of management of wildlife outside wildlife protected areas. In order to effectively deliver this mandate, UWA shall collaborate with other institutions that have related mandates including wetlands and forest management institutions.

8.1.5 Uganda Wildlife Education Centre (UWEC)

As the lead agency for conservation education in Uganda, UWEC shall be responsible for conservation education and awareness, rescue and rehabilitation of wildlife, captive wildlife breeding and management.

8.1.6 Uganda Wildlife Research and Training Institute (UWRTI)

As the lead agency for wildlife research and training, UWRTI shall be responsible for wildlife research, training and consultancy services. This will be done in partnership with Universities and other higher training and research institutions involved in wildlife research and training.

8.1.7 National Forestry Authority (NFA)

As the institution in charge of forestry management in Uganda, National Forestry Authority shall in accordance with this policy and relevant tourism development plans be in charge of ecotourism development in forest reserves under its jurisdiction under technical guidance of Uganda Tourism Board.

8.1.8 National Environment Management Authority (NEMA)

As the regulator for environment management and compliance in Uganda, NEMA shall ensure that all development activities in tourism development areas comply with strategic environment assessments and environmental impact assessment requirements.

8.1.9 Uganda Foreign Missions

In collaboration with the Ministry responsible for tourism and its affiliated Agencies, Uganda foreign missions will promote and market Uganda as a tourism and tourism investment destination.

8.1.10 Local Governments

The Local Governments shall work with the Ministry responsible for tourism to establish and develop Tourism Development Areas, clusters and zones; enforcement of regulations and standards; mobilisation and awareness creation among communities about tourism opportunities and tourism product development under their respective areas of jurisdiction.

10.0.11 Ministry responsible for Education

The Ministry responsible for Education shall:

- 1) In collaboration with the Hotel and Tourism Training Institute conduct admissions to the Institute.
- 2) Integrate tourism matters into National Education Curriculum at all levels.

10.0.11 National Council for Higher Education

The National Council for Higher Education shall be responsible for accreditation of the Training Curricula and assist with quality assurance.

8.1.13 Other Government Ministries, Departments and Agencies

All Ministries, Departments and Agencies of Government while implementing their respective mandates, shall strive to promote the development of tourism through provision of requisite enabling policies, plans and facilities.

8.1.14 Private Sector, Civil Society and Academia

Government recognises the important role played by the Academia, Media, Religious Leaders, Cultural Institutions, NGOs and the private sector in the promotion and development of tourism. In order to encourage their participation and involvement in the management and development of the tourism sector and implementation of this policy in general, Government shall provide necessary support, appropriate incentives, guidelines and collaborative initiatives to private sector, civil society and academia to play a meaningful role in tourism development.

Government shall streamline procedures, and provide appropriate fora where the academia, the private sector and NGOs can meet with the concerned government institutions to discuss issues of mutual interest or concern. Government shall endeavour to build capacity of the private sector and civil society organisations in the tourism sector.

8.1.15 Regional and International Co-Operation

International and regional co-operation is an important tool for tourism development. Uganda is a signatory to and has ratified a number of international and regional tourism related protocols. The provisions in the various protocols encourage and often help individual countries to meet their respective development goals.

Uganda is a signatory to the East African Co-operation Treaty (EAC) and actively participates in EAC Sectoral Council on Tourism and Wildlife Management deliberations. There are a number of opportunities to implement important aspects of the tourism policy through regional and international co-operation.

The effective tourism promotion and marketing requires regional and international co-operation. Significant benefits can be realised and effectiveness increased through regional and international initiatives. Government shall therefore pursue regional and international cooperation in implementation of this policy.

8.2 FINANCING STRATEGY

The underlying principle of Uganda's financial strategy in respect to tourism development is that adequate and sustainable financing are fundamental to effective development and promotion of tourism.

Approaches that shall be taken to finance implementation of this policy include tourism and business development, Government core support, service levies, wildlife use rights, collaborative management arrangements, public private partnerships and tourism trusts and or funds. The following strategies shall be pursued to finance this policy;

1. Establishment of resource mobilisation public-private partnerships
2. Allocate more core public resources to the tourism sector
3. Diversifying and promoting the wildlife and associated tourism products base
4. Service levies
5. Development partner support

8.3 MONITORING AND EVALUATION

Appropriate monitoring and evaluation systems are important to measure the impact of the new strategies, ascertain their progress and assess the effectiveness of making additional resources available to the sector.

In order to properly assess the impact of the Tourism Policy and the effectiveness of those programmes that support its implementation, a constant and progressive monitoring and evaluation shall be carried out by the Ministry responsible for tourism. This will provide information on the status of the tourism sector, and the effectiveness of new development strategies.

There shall also be internal monitoring and evaluation systems to measure the efficiency and effectiveness of the policy implementation institutions in the sector.

“Uganda established as Africa’s top sustainable tourism destination.”

MINISTRY OF TOURISM,
WILDLIFE AND ANTIQUITIES





Ministry of Tourism, Wildlife and Antiquities

Rwenzori Towers 2nd Floor, P. O. Box 4241 Kampala
Plot 6 Nakasero Road, Kampala, Uganda.
Phone: +256 414 561 700 | Email: info@tourism.go.ug
www.tourism.go.ug