



THE REPUBLIC OF UGANDA

MINISTRY OF TOURISM, WILDLIFE AND ANTIQUITIES

TOURISM DEVELOPMENT PROGRAMME ANNUAL PERFORMANCE REPORT

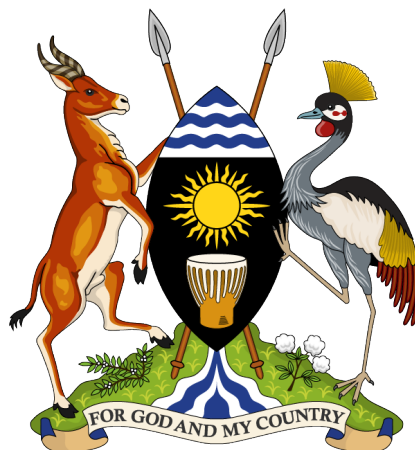
FINANCIAL YEAR 2022/23





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CONTENTS

MESSAGE FROM THE MINISTER.	VI
MESSAGE FROM THE PERMANENT SECRETARY.	VII
EXECUTIVE SUMMARY	VIII
ABBREVIATIONS AND ACRONYMS	XII
1. INTRODUCTION	1
1.1. Overview of the Programme.	1
1.1.1. The Programme's key targeted results to be achieved over the next five years (FY 20/21 to FY 24/25) are:	1
1.2. Goal and Objective of the Programme.	1
1.3. Summary of the Expected Deliverables for the NDP III period	1
2. SCOPE AND OBJECTIVE OF THE TOURISM DEVELOPMENT PERFORMANCE REPORT	3
3. METHODOLOGY	5
4. PERFORMANCE OF THE PROGRAMME FOR FY 2022/23	7
4.1. Overview of Progress of the Tourism Industry	7
4.1.1. Global Tourism Performance in the year 2022	7
4.1.2. International Tourists to East African Community Partner States	8
4.1.3. Tourism Performance in Uganda	9
4.1.4. Top Tourist Source markets for Uganda	10
4.1.5. Contribution to the Economy.	11
4.1.6. Arrival Demographic Statistics (Main Purpose of Visit, Mode of Travel, Gender, Age group)	12
4.1.7. Visitation to National Parks and other Select Attraction Sites.	13
4.1.8. Hotel and Accommodation Statistics	14
4.1.9. Performance of Tourism Training Institutions	15
5. FINANCIAL AND REVENUE PERFORMANCE, FY 2022/23	17
5.1. Direction of Programme financing over the NDP III period: A case of MTWA MDAs.	17
5.2. Financial Performance by MTWA and Agencies, FY 2022/23	18
5.3. Financial Performance by sub-programme	18
5.4. Trend in Non-Tax Revenue Generation by MDAs, FY 2018/19 – FY 2022/23	19
6. PHYSICAL PERFORMANCE OF THE TOURISM DEVELOPMENT PROGRAMME	21
6.1. Overall physical performance	21
6.2. Programme outcomes and the performance against their targets	21

6.2.1. Sub-programme 1: Promote domestic and inbound tourism	23
6.2.2. Sub-programme 2: Infrastructure, Product Development and Conservation 27	
6.2.3. Sub-programme 2: Infrastructure, Product Development and Conservation 32	
6.2.4. Sub-programme 3: Regulation and Skills Development	37
6.2.5. Sub-programme 3: Regulation and Skills Development	39
6.3. PERFORMANCE OF PROJECTS UNDER THE TOURISM DEVELOPMENT PROGRAMME	42
6.3.1. GOVERNMENT OF UGANDA FUNDED PROJECTS.	42
6.4. PERFORMANCE OF INTERVENTIONS UNDER OFF-BUDGET SUPPORT. . .	43
6.4.1. The Handicraft and souvenir Development Project (HSDP) in Uganda . .	43
6.5. COMPETITIVENESS AND ENTERPRISE DEVELOPMENT PROJECT (CEDP) . .	44
6.6. ASSESSMENT OF TOURISM NRM COMMITMENTS FY 2021/22 -FY2025/2026	45
7. PLANNED PROGRAMME PERFORMANCE FOR THE FINANCIAL YEAR 2023/24	49
7.1. Sub-programme 1: Promote domestic and inbound tourism.	49
7.2. Sub-programme 2: Infrastructure, Product Development and Conservation 49	
7.3. Sub-programme 3: Regulation and Skills Development	51
8. PROGRESS OF ACTIVITIES UNDER PROGRAMME GOVERNANCE AND MANAGEMENT	53
8.1. INTRODUCTION	53
8.1.1. Tourism Development Programme Mission Statement:.	53
8.1.2. Tourism Development Programme Strategic Objectives	53
8.1.3. Expected programme outcome deliverables	53
8.2. Progress on the Status of Implementation of Activities under Tourism Development Programme Working Group	53
8.2.1. Composition of the Membership to the Tourism Development Programme Working Group.	53
8.2.2. Creation of Technical Working Groups and setting up of the Secretariat	54
8.2.3. Performance of the Tourism Development Programme Working Group	54
8.2.4. Challenges faced by the Tourism Development Program Working Group	54
8.2.5. Recommendations.	54
9. IMPLEMENTATION CHALLENGES AND MITIGATION MEASURES . .	55
APPENDIX	56

FIGURES

Figure: 1	International Tourist Arrivals, 2019-2022	7
Figure: 2	Regional Variations in Tourist Arrivals in the World	8
Figure: 3	Tourist Arrivals to the East African Community, 2019-2022	9
Figure: 4	Visitor Arrivals to Uganda, 2018-2022	9
Figure: 5	Regional distribution of Tourists to Uganda	10
Figure: 6	Top 15 Source markets for Uganda.	11
Figure: 7	Demographic Statistics 2022	12
Figure: 8	Top Source Markets by Purpose of Visit, 2022	13
Figure: 9	Hotel Occupancy Levels, 2017-2022	14
Figure: 10	Distribution of Hotel Occupancy by Region	15
Figure: 11	Visitor Exports, 2019-2022.	15
Figure: 12	Distribution of Tourism Expenditure, 2022	16
Figure: 13	Revenues generated by the Tourism development Programme, FY2017/18 to FY2022/23.	19
Figure: 14	ICCA RANKING 2022 VS 2019	27

TABLES

Table: 1	Visitors to selected Tourist attraction Sites in Uganda	14
Table: 2	Annual GOU approved funding against NDP III plans for MTWA and Agencies 17	
Table: 3	MDA Specific budgets, FY 2022/23	18
Table: 4	Distribution of funding FY 2022/23 by Sub-programme	18
Table: 5	Non-Tax Revenue performance by MDA	20
Table: 6	FY 2022/23 Programme performance Score card.	21
Table: 7	Outcome Level performance Score card.	22
Table: 8	Output level performance Score card	23
Table: 9	Performance against targets under domestic and inbound tourism Promo- tion	24
Table: 10	Performance against targets under Infrastructure Development	28
Table: 11	Already paved and Completed Civil Works.	30
Table: 12	Civil works are already ongoing, feasibility studies and detailed designs have been completed.	30
Table: 13	Civil works to start in the remaining NDP III period FYs 2023/24 or 2024/25	31
Table: 14	Awaiting resources and scheduled to start after NDP III	31
Table: 15	Performance against targets under Product Development and Conservation	32
Table: 16	Performance against targets under Skills Development	38
Table: 17	Performance against targets under Regulation	40
Table: 18	Projects under Public investment Plan	42

Table: 19	General Performance against the NRM Manifesto 2021-2026 commitments	45
Table: 20	Global Tourism Performance, 2019-2022	56
Table: 21	Tourism Performance in Africa and Regions.	56
Table: 22	Tourism Performance among EAC Partner States	56
Table: 23	Tourism Arrivals to Uganda by Purpose, 2019-2022	56
Table: 24	Regional Distribution of Tourists to Uganda by Purpose, 2019-2022.	56
Table: 25	Monthly Tourist Arrivals to Uganda, 2019-2022.	57
Table: 26	Visitation to Uganda's National Parks.	57

MESSAGE FROM THE MINISTER



I am delighted to present to the public this Annual Tourism Development Programme Performance Report for the Financial Year 2022/23. This is an important instrument of accountability on how the Programme is delivering on its NDPIII goal of increasing Uganda's attractiveness as a preferred tourist destination.

This performance report highlights both the financial and physical performance of the programme during the financial year including the revenues generated by sector departments and agencies. It also highlights the achievements at output and outcome levels in areas of Marketing and Promotion, Infrastructure, Product Development and Conservation and Regulation and Skills Development.

The Financial Year 2022/23 was a recovery year in our tourism industry that was greatly affected by the COVID-19 pandemic. Full opening up of the economy created an opportunity for Uganda to reposition itself as a global tourism destination.

The programme continued to register significant recovery or further growth in domestic tourism, tourist arrivals; foreign exchange earnings; contribution of tourism to GDP; employment, tourism business as well as the population of key wildlife species among others.

These successes are attributed to the combined efforts by various stakeholders including the Ministry, its agencies, other GOU MDAs, the Private Sector, Civil Society Organizations, Development Partners, and NRM Government that have provided a conducive environment and partnerships to develop the tourism industry to such heights.

Over the remaining NDP III period, we shall enhance efforts in the implementation of interventions to promote domestic and inbound tourism, increase the stock and quality of tourism infrastructure, develop, conserve and diversify tourism products and services and develop a pool of skilled personnel along the tourism value chain

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

For God and My Country.

A handwritten signature in black ink, appearing to read 'Tom R. Butime', with a long horizontal line extending to the right.

Tom R. Butime MP

MINISTER OF TOURISM, WILDLIFE AND ANTIQUITIES

MESSAGE FROM THE PERMANENT SECRETARY



The Financial Year 2022/23 followed two years of the global COVID-19 pandemic which significantly affected tourism. With the impact of COVID-19 restrictions, the opportunities for encouraging the return of travel were constrained in the first half of the financial year.

When the international borders were open, we embarked on our journey of making Uganda a preferred tourist destination in Africa. Our extended focus on domestic marketing, in response to the pandemic, with our 'Explore Uganda' regional campaigns as well as content, PR and social media channels of all the incredible experiences that tourism in Uganda offers, have yielded great results.

The annual performance assessment and review of the Tourism Development Programme is a much-needed exercise that provides an opportunity to showcase the performance of the Programme.

Uganda's Tourism Sector continues to be on a positive trend and generated USD 729 million by end of FY 2022/23 and contributed 4.7% to the country's GDP. International tourist Arrivals increased by 58.8% from 512,945 in 2021 to 814,508 in 2022 while domestic tourists increased to 1.42 million in 2022/23.

I acknowledge our tourism industry private sector players who have endured an incredibly difficult couple of years. I am indeed proud to work in an industry of remarkably resilient, talented and passionate actors.

I am very grateful for your continued support and will continue to collaborate and work with you and all other players, to fast-track the implementation of interventions that grow tourism, conserve our wildlife and cultural resources while making Uganda a preferred destination on the continent.

A handwritten signature in black ink, appearing to read 'D. Katusiime', with a stylized flourish at the end.

Doreen S. Katusiime (Mrs)
PERMANENT SECRETARY

EXECUTIVE SUMMARY

Introduction

This Tourism Development Programme Annual Performance Report FY2022/23 provides highlights on the performance of the programme focusing on the 3rd National Development Plan (NDP III), the NRM Manifesto 2021-26, the annual operational plans for MDAs as well as the revenue performance.

The report presents the performance of the Tourism industry at the national, East African Community (EAC) and global scale and also gives insights into the issues that limit the realisation of the Programme objectives and its aim of making Uganda the preferred tourist destination. It highlights what has been delivered at output and outcome levels.

The objective of the report is to provide timely and focused information to the decision makers and other stakeholders on the performance of the Tourism Development Programme during the Financial Year 2022/23 as well as the recent past.

It provides financial and physical accountability for the Programme budget outlining key areas of performance and under-performance. It is timely at this critical moment when the Government is kickstarting the preparation of the 4th National Development Plan.

Global and Regional outlook of the Tourism Industry

In 2022, the international tourist arrivals doubled to 963 million when compared to the year 2021, but remained 34% below 2019 levels. Most of the recovery was recorded in the regions of Europe and the Middle East with the latter reaching 90% of the pre-COVID-19 levels. Africa recovered to 67% and Asia was at the lowest realizing only 28% of the 2019 levels due to stricter pandemic-related restrictions.

Furthermore, in the year 2022, the tourism sector contributed 7.6% of the global GDP, supported 295 million jobs and accounted for 9% of total employment. All economies earned tourism foreign exchange totaling to US\$ 1 trillion in the year 2022 but the average expenditure by an international visitor was still low at only 64% of pre-COVID-19 levels.

The East African Community (EAC) attracted 5.2 million tourists, a 49.4% increase from 2021 but still 39.8% lower than 2019 levels.

Uganda's tourism on stead path to full recovery and further growth

Uganda's tourism witnessed a significant recovery in the year 2022 where a total of 814,508 tourist arrivals were recorded translating into a 59% increase from the year 2021 where a total of 512,945 were recorded. While this reflects positive progress in the sector's post-pandemic comeback, the performance is only 53% of the arrivals in the year 2019. The outlook for Uganda's tourism sector in 2023 appears optimistic, thanks to the full reopening of key tourism source markets, including Europe, North America, Asia, China, Japan, and Africa.

Africa continued to be the primary source of tourists to Uganda in 2022, accounting for 88% of total international arrivals. The leading markets remained the neighboring countries of Kenya, Rwanda, South Sudan and Tanzania. Notably, India, United States, the United Kingdom, and China ranked among the top 12 source markets.

The top reasons for tourists visiting Uganda in 2022 were; reconnecting with friends and relatives (38.2%) and business (15.5%), while only 11.7% visited for leisure and holidays. Different source markets were associated with varying purposes of visits, with leisure and holiday visitors mainly originating from the USA and the UK, while meetings, conferences, and business visits had greater contributions from East African Community (EAC) member states.

During the year, the total contribution of tourism to GDP was Ushs 7.9 trillion (4.7% of GDP). This reflects the economic activity generated by industries such as hotels, travel airlines, activities of restaurants and leisure industries, as well as the wider effects from investments, the supply chain and induced income. Tourism also accounted for 620,000 jobs or 3.5% of total employment in 2022.

Tourism Receipts/foreign exchange earnings were Ushs 2.7 trillion (equivalent to USD 0.736 billion) in the year 2022. This represented a substantial 12.2% of the country's total exports and a significant 41.4% of its service exports for the year.

The hotel and accommodation sub-sector attained occupancy rates of 46.9% in 2022 from the low of 20.1%

recorded in the year 2020. During the year, the highest occupancy was in Kampala region at 61.4% while the Central and Western regions had the lowest occupancy rates at 33.8%.

Tourist Sites in Uganda record unprecedented performance

Uganda's selected tourist sites, including National Parks, the Source of the Nile, Museums, and Uganda Wildlife Conservation Education Centre (UWEC), experienced a complete recovery in visitor numbers and indeed surpassed the 2019 levels. These sampled sites altogether, hosted a total of 1,060,354 visitors in 2022, indicating a substantial 15.2% growth compared to the year 2019 levels. Visitation to National Parks doubled in 2022, from 189,988 visitors in 2021 to 367,869 in 2022 and such huge numbers have never been realized ever since the establishment of these tourist sites.

Financial Performance over the NDP III Period

Over the NDP III period of 5 years (FY 2020/21 – 2024/25), the Ministry and Agencies were tasked to deliver on various interventions as detailed in the Programme Implementation Action Plan (PIAP) at a cost of Ushs 2.906 trillion. In the first 3 years, a cumulative total of Ushs 576 billion was approved as GOU funding and this includes Ushs 238 billion Non-Tax Revenue collections from the Ministry and its Agencies.

In addition to the above Government Of Uganda (GOU) funding, two major World Bank Funded projects have been implemented namely the Competitiveness and Enterprise Development Project (CEDP – AF) which has supported the implementation of interventions at UWEC, UWA, UHTTI, UTB and MTWA at a cost of about Ushs 30 billion over the 3 years of NDP III period; as well as the Investing in Forests and Protected Areas for Climate Smart Development (IFPA-CD) which provided funding amounting to Ushs 3.9 billion during the FY 2022/23.

During the FY 2022/23, only Ushs 199 billion was appropriated against the NDP III planned expenditure of Ushs 635 billion translating into 31 percent. This persistent gross underfunding has affected several Programme interventions including the mass roll-out of the Explore Uganda brand; the upgrade of Protected Areas; massive investment in tourism products such as mountaineering; water-based products including the Source of the Nile, Hotsprings and water falls; the Convention Centre; modernisation and expansion of UWEC; Upgrade of Training institutions (UWRTI and UHTTI) to achieve the international centre of excellence status; Cultural heritage sites development; quality assurance of tourism services, and labour force skills development. This has had a huge impact on the realisation of the NDP III planned targets for the FY 2022/23.

Non-Tax Revenue (NTR) Generation by the Ministry and its Agencies

The Ministry and Agencies internally generated Ushs 105.3 billion against a target of Ushs 92.8 billion for the FY 2022/23. This translates into 113 percent performance and this relatively good performance is attributed to higher-than-projected rate of recovery of Uganda's tourism especially for the activities in Protected Areas. The Uganda Wildlife Authority remains the largest contributor and accounted for 93 percent of all NTR collections.

The recovery of tourism activities at most sites has been enhanced by the intensified marketing efforts both domestically and internationally that have undoubtedly led to the increase in the number of visitors to National Parks that nearly doubled from 189,988 in 2021 to 367,869 in the year 2022; Increase in visitation to Uganda Museum from 2,883 visitors in 2021 to 67,366 in the year 2022; and UWEC visitation that increased from 131,117 people in 2021 to 486,464 in the year 2022.

However, this performance was below the pre-COVID-19 levels where the NTR of Ushs 130 billion was collected in FY 2018/19. It is projected that in the FY 2023/24, the pre-COVID-19 revenue collections will be surpassed.

Physical Performance of the Tourism Development Programme

The Tourism Development Programme consists of 110 indicators (23 at outcome level and 87 at output level) and overall, 52 percent of these indicators were achieved by end of FY2022/23 while 36 percent were not achieved and 12 percent not assessed. This performance is largely attributed to the gross underfunding where the funding levels are way below the NDP III planned funding against which the targets were hinged. In FY 2022/23, only 31 percent of the planned funding was approved which could mainly cover the fixed costs of wage, gratuity, rent, animal welfare, Protected Area management as well as sustenance of training institutions.

At outcome level, 57 percent of the indicator targets were achieved. This achievement was registered in areas of expenditure per international tourist which increased to US\$ 1,550 against NDP III target of 1,361; the number of Ugandans visiting key tourist attractions which surpassed a million mark; the accommodation capacity where

the total number of rooms in all accommodation facilities were 350,550; improved wildlife ecosystems where the population of elephants and antelopes surpassed NDP III targets. Tourism contribution to total employment is currently at 14.7% (1,559,147 million jobs) against the NDP III target of 7.5%. During the financial year, the Cultural heritage conservation was boosted and the visitation to the cultural heritage sites increased to unprecedented levels.

Conversely, the underperformance was registered in the areas of tourism foreign exchange earnings, contribution to GDP, leisure tourism, the number of direct flight routes and airlines, International Tourist arrivals from the Americas, Europe and China, population of lions, and Incidences of human Wildlife Conflicts.

At output level, 51 percent of the output indicator targets were achieved while 34% were not achieved and 15 percent not assessed.

Sub-programme 1: Promote Domestic and Inbound Tourism

Excellent performance was registered in the aspects of: Association with the Explore Uganda brand; domestic tourism promotion, digital marketing campaigns; promotion of MICE; establishment and operationalisation of information centers;

Underperformance at the output level was largely in the areas of Explore Uganda brand rollout in the regional and international source markets; deployment of Market Destination Representative firms in key source markets; training of Ugandan diplomats and Visa/consular staff to support tourism;

Sub-programme 2: Infrastructure, Product Development and Conservation

Excellent performance was registered in the aspects of: maintenance of tourism trails; internet connectivity of tourism sites; CITES permitting; souvenir and craft centres; tourism roads; tourism product development; modernisation of UWEC; the legal framework for the Museums and Monuments sub-sector; cultural heritage conservation as well as the management of Uganda's Wildlife Protected Areas including 10 National Parks and 12 Wildlife Reserves.

Underperformance at the output level was largely in the areas of Regional aerodromes development; Marine routes development/upgrade including 20 docking piers and access roads on Lake Victoria; International hotel chains establishment; Accommodation and catering services in protected areas; product development; new ranger outposts establishment in protected areas; electric fencing; upgrade of Key Wildlife Reserves and Natural Central Forest Reserves to National Park status; as well as invasive species encroachment on Protected Areas.

Sub-programme 3: Regulation and Skills Development

Excellent performance was registered in the aspects of: regulations and standards to operationalize the Uganda Wildlife Act 2019; the legal framework for the Museums and Monuments sub-sector; training at UWRTI and UHTTI; quality assurance of Tourism service standards as well as governance and coordination.

Underperformance at the output level was largely in the areas of grading and classification of tourism facilities; UHTTI infrastructure (class rooms, labs, admin block) development; UWRTI infrastructure (class rooms, labs, admin block, fence, staff housing, guest house) development; Creation of partnerships with private sector for apprenticeship projects; Establishment of the Tourism investment fund and Tourism levy; apprenticeship and on job-training for the private sector labour force; as well as capacity built for local hospitality sector enterprises for increased participation in local, regional and global tourism value chains.

Progress in implementation of NRM Manifesto commitments

The NRM government through its Manifesto 2021-2026 pronounced 16 commitments to deliver on the advancement of tourism as key driver to achieving economic growth. Out of the 16 commitments, 14 (87.5%) are on track and are likely to be fully achieved by the end of the term. These include the support to the sector to fast-track its recovery from the impacts of COVID-19; development of infrastructure including Hoima/Kabaale International Airport and expansion of Entebbe International Airport; brand rollout in Africa and overseas; development of accommodation and conference facilities; development of an International Convention Centre in Entebbe; natural and cultural heritage conservation and upgrade of key wildlife reserves and natural central forest reserves to National Parks; establish 10 valley dams in water stressed conservation areas; electric fencing; Modernization of UWEC and the National Museum; Upgrade and transformation of UWRTI and UHTTI into cen-

tres of excellence for wildlife and tourism training and research; as well as the development and diversification of tourist attractions sites.

In contrast, little has been realized on the commitment to rehabilitate marine routes including development of 20 piers on Lake Victoria; as well as the enhancement of the capacity of labour force along the tourism value chain through undertaking on-job training for 20,000 workers as well as apprenticeship for 1,000 Ugandans.

Challenges in Implementation

Insecurity arising from political instabilities in some of the neighbouring states; disease outbreaks; the negative media coverage and travel advisories; inadequate budgetary allocations of only about 30 percent of the NDP III requirements; limited facilities and training equipment at UHTTI and UWRTI; increasing pressure from the expanding human populations resulting in human wildlife conflicts; illegal activities such as poaching or killing wildlife outside park boundaries, climate change, as well as habitat destruction; Invasive species; encroachment on cultural heritage sites; and increased intensity of problem animals; Multiple licensing frameworks and taxes making tourism business less competitive; as well as gaps in critical infrastructure such as regional aerodromes, tourism roads; internet coverage; limited extension of water and electricity to tourism sites; gaps in skills and quality standards.

Planned Programme performance for the next Financial Year 2023/24

A total budget of Ushs 248 billion was approved for the Tourism Development Programme to implement the approved work plans for the FY 2023/24.

At outcome level, and in line with the NDP III results framework, the Programme is expected to realise a proportion of 28% leisure tourist arrivals; have 20% Ugandan enterprises associating with Uganda's brand; record at least 568,885 Ugandans visiting National Parks, Museums and UWEC; realise Global tourism competitiveness position of 93 out of 136 countries; achieve 77% tourist satisfaction; have at least 12.8% of tourist arrivals as package tourists. The Programme further targets to realise 1.88 million tourist arrivals and generate US\$ 1.774 billion in foreign exchange earnings while contributing 8% of Uganda's GDP.

At output level, the Explore Uganda brand will be rolled out both domestically and international markets; the MICE industry will be developed; Uganda's 22 Wildlife Protected Areas managed and conserved; Tourism Information Management System operationalized (TIMS); UWEC modernised and maintained; students enrolled, maintained and trained at UHTTI and UWRTI; and tourism regulations shall be enforced. Additionally, the private sector will be supported to participate in local, regional and global tourism value chains; and tourism infrastructure shall be developed including construction of Tourism roads as well as the completion and operationalisation of Hoima International Airport and the expansion of Entebbe International Airport.

ABBREVIATIONS AND ACRONYMS

AEWA	African–Eurasian Water Bird Agreement
AGM	Annual General Meeting
AUTO	Association of Uganda Tour Operators
BFP	Budget Framework Paper
BINP	Bwindi Impenetrable National Park
BMCT	Bwindi and Mgahinga Conservation Trust
BOQs	Bills of Quantity
BOU	Bank of Uganda
CA	Conservation Area
CEDP	Competitiveness and Enterprise Development Project
CEDP-AF	Competitive Enterprises Development Project Additional Financing
CICS	Competitive Investment Climate
CITES	Convention of International Trade in Endangered Species of wild fauna and flora
CMS	Convention on Migratory Species of Wild Animals
CoP	Conference of Parties
CSOs	Civil Society Organizations
CSWCT	Chimpanzee Sanctuary and Wildlife Conservation Trust
DCO	District Commercial Officer
DPs	Development Partners
EAC	East African Community
FY	Financial Year
GAPR	Government Annual Performance Report
GDP	Gross Domestic Product
GMP	General Management Plans
GoU	Government of Uganda
Ha	Hectares
IAS	Invasive Alien Species
IATA	International Air Travel Agency
IGAD	Inter Government Agency for Development
IGP	Inspector General of Police
IRA	Insurance Regulatory Authority
ISO	Internal Security Organization
KCCA	Kampala Capital City Authority
KNP	Kibale National Park
KVNP	Kidepo Valley National Park
LDPG	Local Development Partners Group
LGs	Local Governments
LMNP	Lake Mburo National Park
M&E	Monitoring and Evaluation
MBWR	Matheniko Bokora Wildlife Reserve
MDAs	Ministries, Departments and Agencies
MEACA	Ministry of East African Affairs
MECA	Mount Elgon Conservation Area
MEMD	Ministry of Energy and Mineral Development
MFNP	Murchison Falls National Park
MFPA	Murchison Falls Protection Area
MGNP	Mgahinga Gorilla National Park
MIA	Ministry of Internal Affairs
MICE	Meetings Incentives Conferences and Events/Exhibitions
MICT & NG	Ministry of ICT and National Guidance
MODVA	Ministry of Defence and Veteran Affairs
MOES	Ministry of Education and Sports
MoFA	Ministry of Foreign Affairs
MoFPED	Ministry of Finance, Planning and Economic Development
MoLG	Ministry of Local Government
MoPS	Ministry of Public Service
MOU	Memorandum of Understanding
MoWE	Ministry of Water and Environment
MoWT	Ministry of Works and Transport

MPS	Ministerial Policy Statement
MTEF	Medium Term Expenditure Framework
MTIC	Ministry of Trade, Industry and Cooperatives
MTWA	Ministry of Tourism, Wildlife and Antiquities
NDP	National Development Plan
NEMA	National Environmental Management Authority
NFA	National Forest Authority
NITA-U	National Information Technology Authority
NP	National Park
NPA	National Planning Authority
NTR	Non Tax Revenue
PA	Protected Area
PACU	Problem Animal Control Units
PIAP	Programme Implementation Action Plan
POATE	Pearl of Africa Tourism Expo
PPDA	Public Procurement and Disposal Authority
PPP	Public-Private Partnerships
PSFU	Private Sector Foundation Uganda
PUWR	Pian Upe Wildlife Reserve
QENP	Queen Elizabeth National Park
RMNP	Rwenzori Mountains National Park
SMEs	Small and Medium Enterprises
SNP	Semliki National Park
TDA	Tourism Development Area
TDP	Tourism development programme
TIMS	Tourism Information Management System
TORs	Terms of Reference
TSA	Tourism Satellite Account
TSWG	Tourism Sector Working Groups
TSWR	Toro-Semliki Wildlife Reserves
TUGATA	The Uganda Association of Travel Agents
UA	Uganda Airlines
UBC	Uganda Broadcasting Corporation
UBOS	Uganda Bureau of Statistics
UCAA	Uganda Civil Aviation Authority
UCDA	Uganda Coffee Development Authority
UCOTA	Uganda Community Tourism Association
UDC	Uganda Development Corporation
UEPB	Uganda Export Promotion Board
UHOA	Uganda Hotel Operators Association
UHTTI	Uganda Hotel and Tourism Training Institute
UIA	Uganda Investment Authority
UK	United Kingdom
UNDP	United Nations Development Programme
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNRA	Uganda National Roads Authority
UNWTO	United Nations World Tourism Organization
UPDF	Uganda People's Defence Forces
URSB	Uganda Registration Service Bureau
USAGA	Uganda Safari Guide Associations
UTA	Uganda Tourism Association
UTB	Uganda Tourism Board
UWA	Uganda Wildlife Authority
UWEC	Uganda Wildlife Conservation Education Centre
UWRTI	Uganda Wildlife Research and Training Institute
WB	World Bank
WCU	Wildlife Clubs of Uganda
WTTC	World Tourism and Travel Council
WWF	World Wildlife Fund



Chimpanzee at Ngamba Island

1. INTRODUCTION

1.1. OVERVIEW OF THE PROGRAMME.

Tourism Development is one of the 20 Programmes adopted by Government in the new Programme - based Approach to planning, budgeting and Implementation under NDP III. The programme is expected to contribute to delivery of required results aimed at addressing the 13 strategic bottlenecks adopted by the African Union. Likewise, the program contributes to the attainment of the results of NDP III's objective one which is; to increase production and productivity of the key growth sector.

1.1.1. The Programme's key targeted results to be achieved over the next five years (FY 20/21 to FY 24/25) are:

1. Increase annual tourism revenues from USD 1.45 billion to USD 1.862 billion;
2. Maintain the contribution of tourism to total employment at 667,600 people;
3. Increase inbound tourism revenues per visitor from USD1, 052 to USD1, 500;
4. Maintain the average number of International Tourist arrivals from the U.S, Europe, Middle East, China and Japan at 225,300 tourists;
5. Increase the proportion of leisure to total tourists from 20.1 percent to 30 percent;
6. Increase the number of direct flight routes to Europe and Asia from 6 to 15.

To achieve the Programme's targeted results, Ministry of Tourism Wildlife and Antiquities created five Technical Committees of the Tourism Development Working Group chaired by the Permanent Secretary. These include; Marketing & Promotion Working Committee, Product Development and Infrastructure Working Committee, Regulation & Quality Assurance Working Committee, Natural and Cultural Heritage Working Committee and Skills Development Working Groups

The committees instituted by the ministry are expected to work in close coordination with other government institutions (MDAs), private sector players, Civil Society Organisations (CSOs), Religious Leaders, and Development Partners to deliver on key targeted results.

1.2. GOAL AND OBJECTIVE OF THE PROGRAMME.

The overarching goal of this programme is to increase Uganda's attractiveness as a preferred tourism destination.

The objectives of the programme are to:

1. Promote domestic and inbound tourism;
2. Increase the stock and quality of tourism infrastructure;
3. Develop, conserve and diversify tourism products and services;
4. Develop a pool of skilled personnel along the tourism value chain and ensure decent working conditions; and
5. Enhance regulation, coordination and management of the tourism.

1.3. SUMMARY OF THE EXPECTED DELIVERABLES FOR THE NDP III PERIOD

For the 5 period of implementation of NDP III, Tourism Development programme is expected to have the following deliverables;

1. National Tourism Marketing Strategy developed
2. Domestic promotional campaigns conducted
3. 2.1 Million Tourists attracted to Uganda
4. Brand Manuals, Logos, Slogans and other related materials developed, produced and rolled out.
5. 80,000 promotional materials produced
6. 651,317 Ugandans Visiting Tourist sites (National Parks, UWEC, Museums and Cultural heritage sites and monuments) by 2025

7. 10 digital marketing campaigns undertaken in the source markets
8. 12 Market Destination Representatives (MDRs) firms contracted and maintained in key source markets including China, Japan and Asia to promote Uganda
9. 12 Tourism information centers constructed/ established in selected regions
10. A total of 15 direct flight routes to Europe and Asia operational.
11. 735 Kms of identified tourism roads network paved including roads leading to cultural heritage sites of Bigo Byamugenyi archaeological heritage, Nyero, Patiko, Emin Pasha's fort.
12. 2,300kms Length of trails and trucks maintained inside protected areas (PAs)
13. National convention Center Constructed
14. 20 water dams constructed in Protected Areas
15. 5,000 Tourism enterprises inspected, graded and classified
16. 9 cultural sites developed
17. 3 Key Wildlife Reserves and Natural Central Forest Reserves upgraded to National Park status
18. UWRTI infrastructure developed
19. UHTTI infrastructure developed.



Mountain Gorilla In Mgahinga Gorilla National Park

2. SCOPE AND OBJECTIVE OF THE TOURISM DEVELOPMENT PERFORMANCE REPORT

The objective of the Tourism Development Programme Performance Report is to provide stakeholders particularly decision makers across all fronts (Government & Private) with timely and focused information on the performance of the programme during the previous Financial Year (2022/23) and in the medium term. The assessment focuses on the performance of the Tourism Development Programme against the key objectives as outlined in the Tourism implementation Action Plan (PIAP).

More so, the programme performance report gives an annual assessment of programme set targets, achievements, and outputs, but also highlights the major challenges or strategic issues which affect performance. The report includes data and analysis with respect to the agreed key indicators.





Elephant in Muchison Falls National Park

3. METHODOLOGY

The compilation of tourism performance report took on a mixed method of approach. Both Qualitative and Quantitative information concerning different elements of performance were sought, including gathering information from key source documents including reports available within the Ministry, its Departments and Agencies. The following approaches were employed;

The team compiled performance data from existing reports, surveys, and progress reports.

Input was sought from the Programme implementing members to inform the assessment.

Analysis of data collected from the above sources was conducted and reporting done according to the appropriate format.





Shoebill in Mabamba Swamp

4. PERFORMANCE OF THE PROGRAMME FOR FY 2022/23

4.1. OVERVIEW OF PROGRESS OF THE TOURISM INDUSTRY

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

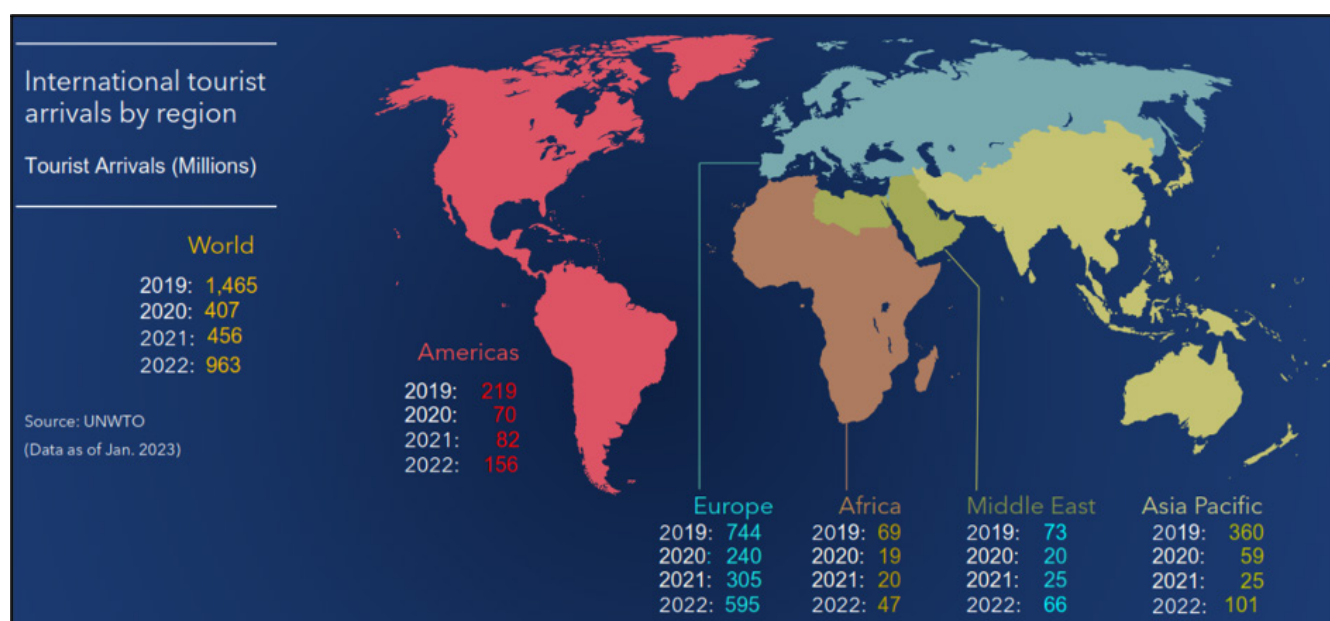
4.1.1. Global Tourism Performance in the year 2022

International Tourist arrivals doubled in 2022 when compared with the year 2021, but remained 34% below 2019. A total of 963 million tourists travelled internationally in 2022 as shown in Figure 1, twice as many as in 2021. International tourism recovered 63% of pre-pandemic levels in 2022, with Europe and Middle East in the lead. This recovery was largely attributed to the lifting or relaxation of travel restrictions in a large number of countries.

Europe, the world's largest destination region, recorded 595 million arrivals in 2022 to reach 80% of pre-pandemic levels (-20% over 2019). The Middle East enjoyed the strongest relative increase across regions in 2022 with arrivals climbing to 90% of pre-pandemic numbers (-10% versus 2019). The region welcomed large events such as Expo 2020 Dubai and the FIFA World Cup in Qatar, as well as a highly attended Hajj pilgrimage in Saudi Arabia. Africa recovered about 67% of its pre-pandemic visitors and the Americas recovered about 71% of its pre-pandemic visitors, while Asia and the Pacific reached only 28%, due to stronger pandemic-related restrictions.

International Tourist arrivals to Africa more than doubled in 2022 when compared with 2021 to reach 47 million arrivals in 2022 but was 32.6% fewer than the 2019 levels. This shows that Africa is recovered at 67% by end of 2022. The sub-Saharan Africa is the most popular sub region in Africa for tourists

Figure: 1 International Tourist Arrivals, 2019–2022



Source: UNWTO, 2023

Furthermore, the year 2022 saw a strong rebound in tourism spending, resulting in the recovery of pre-pandemic levels in income across many destinations. International tourism receipts reached USD 1 trillion in 2022, growing 50% in real terms compared to 2021, driven by the important rebound in international travel.

As a result, international visitor spending reached 64% of pre-pandemic levels (-36% compared to 2019, measured in real terms). By regions, Europe enjoyed the best results in 2022 with USD 550 billion in tourism receipts, equivalent to 87% of pre-pandemic levels. Africa recovered 75% of its pre-pandemic receipts, the Middle East 70% and the Americas 68%.

The recovery can also be seen in outbound tourism, with strong international spending in 2022 from major source markets. Saudi Arabia (+6%), Germany (+2%) and France (0%) recovered prepandemic spending levels, as well as Portugal (+8%) and Austria (+6%). The United States (-13%), Italy, Netherlands, Sweden (all -8%) and Belgium (-7%) all came close to 2019 levels.

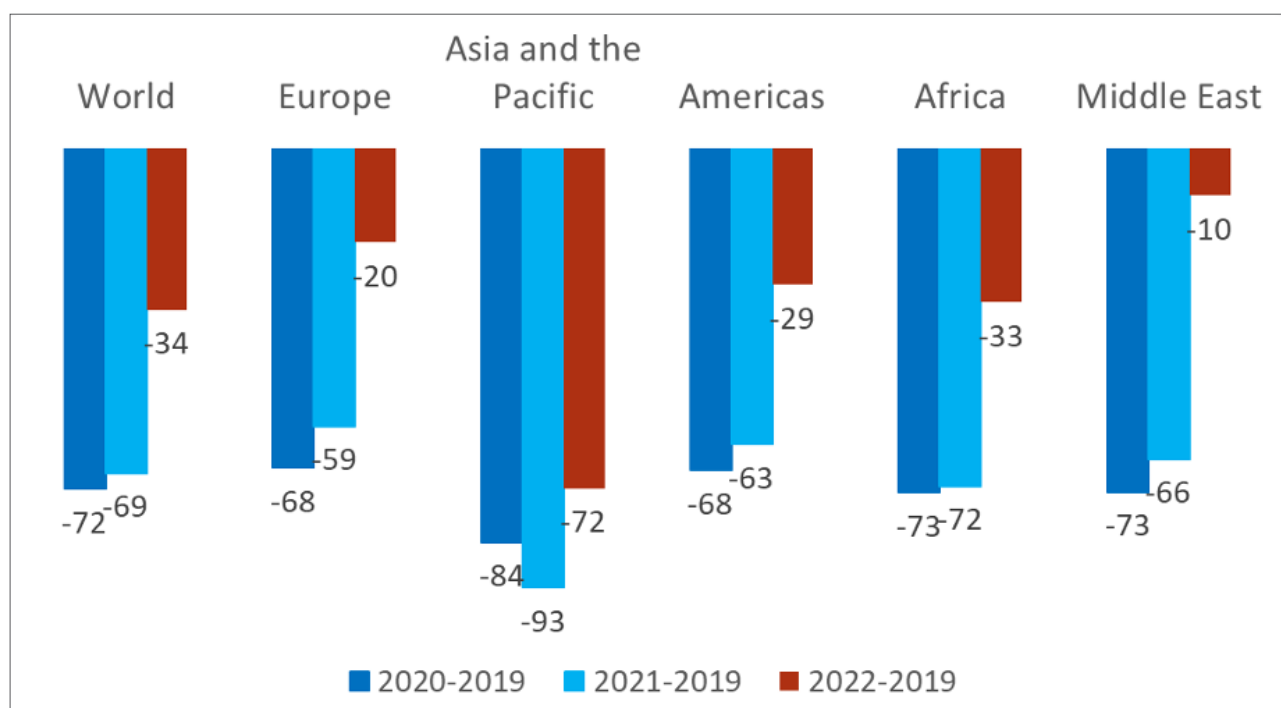
Looking ahead, international tourism is set to consolidate its recovery in 2023, backed by pent-up demand, particularly from Asia and the Pacific as destinations and markets open up. The UNWTO Panel of Experts survey indicates that 72% of respondents expect better performance in 2023. However, most experts (65%) also believe international tourism will not return to 2019 levels until 2024 or later.

4.1.2. International Tourists to East African Community Partner States

In 2022, the East African Community (EAC) attracted 5.2 million tourist arrivals to the region. This was an increase of 49.4 percent over the year 2021 but remained 39.8% lower than 2019 levels. EAC international tourist arrivals recovered at a similar level with the global recovery rate at 60% of pre pandemic levels in 2022, with Tanzania and Kenya taking the Lead.

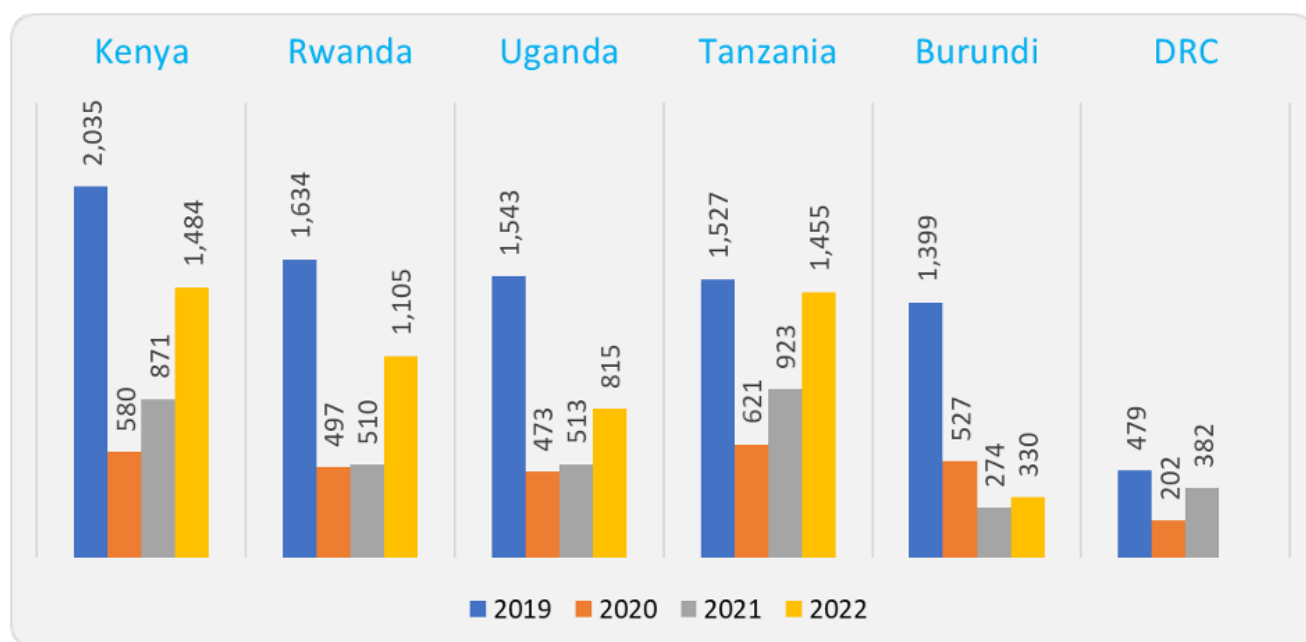
Tanzania recorded 1.455 million tourist arrivals in 2022 to reach 95% of pre-pandemic levels (-5% over 2019). Tourist Arrivals to Rwanda doubled in 2022 to reach 68% of the 2019 levels while Kenya enjoyed a relative increase in Tourist arrivals in East Africa of 70.4% recording 1.484 million tourists reflecting a 73% recovery level from the 2019 levels.

Figure: 2 Regional Variations in Tourist Arrivals in the World



Source: UNWTO, 2023

Figure: 3 Tourist Arrivals to the East African Community, 2019–2022



Source: UNWTO, 2023

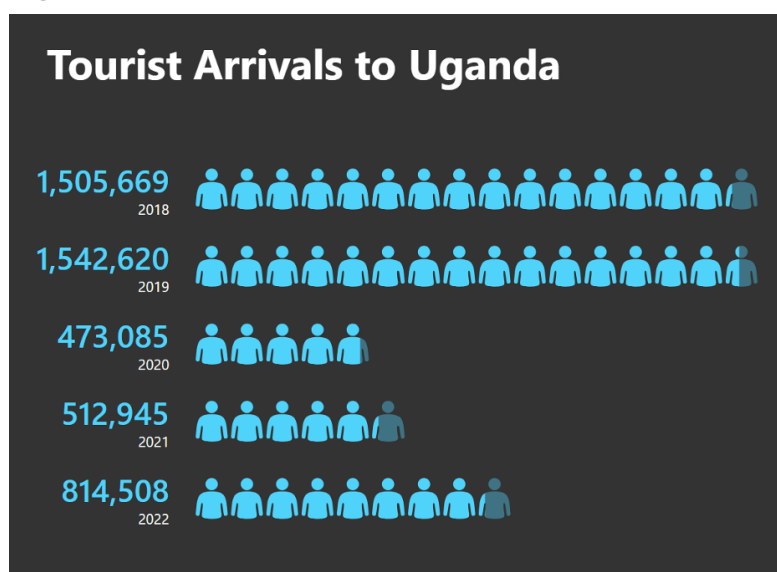
4.1.3. Tourism Performance in Uganda

International Tourist Arrivals to Uganda

In the year 2022, Uganda experienced a notable upswing in the number of international travelers, with visitor arrivals surging by 58.8% from 512,945 to 814,508 tourists with the sector showing recovery of 52.8% from the 2019 levels. This increase stands as a promising indicator of the tourism sector's recovery from the adverse impacts of the coronavirus pandemic.

The trajectory toward restoring Uganda's tourism sector to its pre-pandemic vigor appears to be on a positive track, with projections pointing towards a full rebound in 2023. This encouraging outlook can be largely attributed to the reopening of key tourism source markets for Uganda, encompassing Europe, North America, Asia, China, Japan, and, of course, Africa – which represents the primary source of international tourists arriving in Uganda and aggressive marketing.

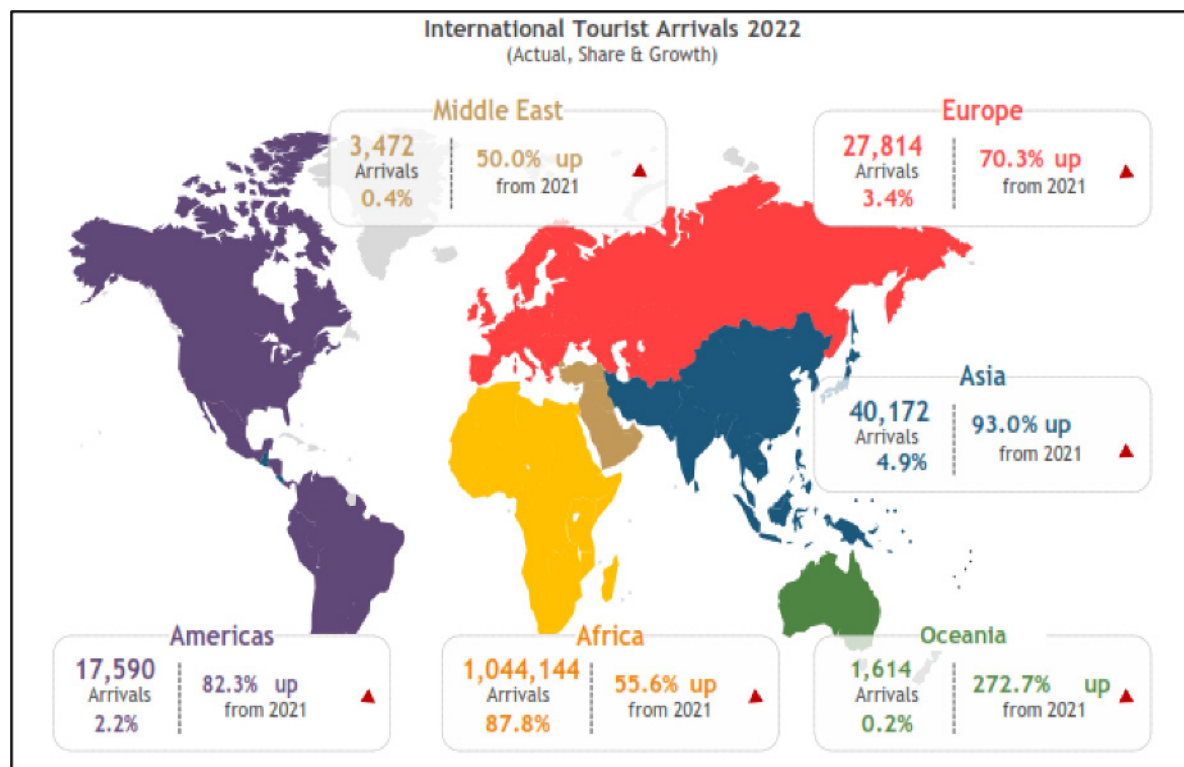
Figure: 4 Visitor Arrivals to Uganda, 2018–2022



Source: Pisces Data, Ministry of Internal Affairs

Moreover, in the year 2022, Africa continued to uphold its position as the primary origin continent for tourists visiting Uganda, constituting 87.8% of the total international tourist influx (See Figure xx below). On the other hand, Europe and America slipped down to the third and fourth positions, while Asia emerged as the second leading source with a share of 4.9%. Notably, every region experienced growth, with Oceania, America, and Asia displaying the most substantial surges at rates of 272.7%, 93%, and 82.3% correspondingly.

Figure: 5 Regional distribution of Tourists to Uganda

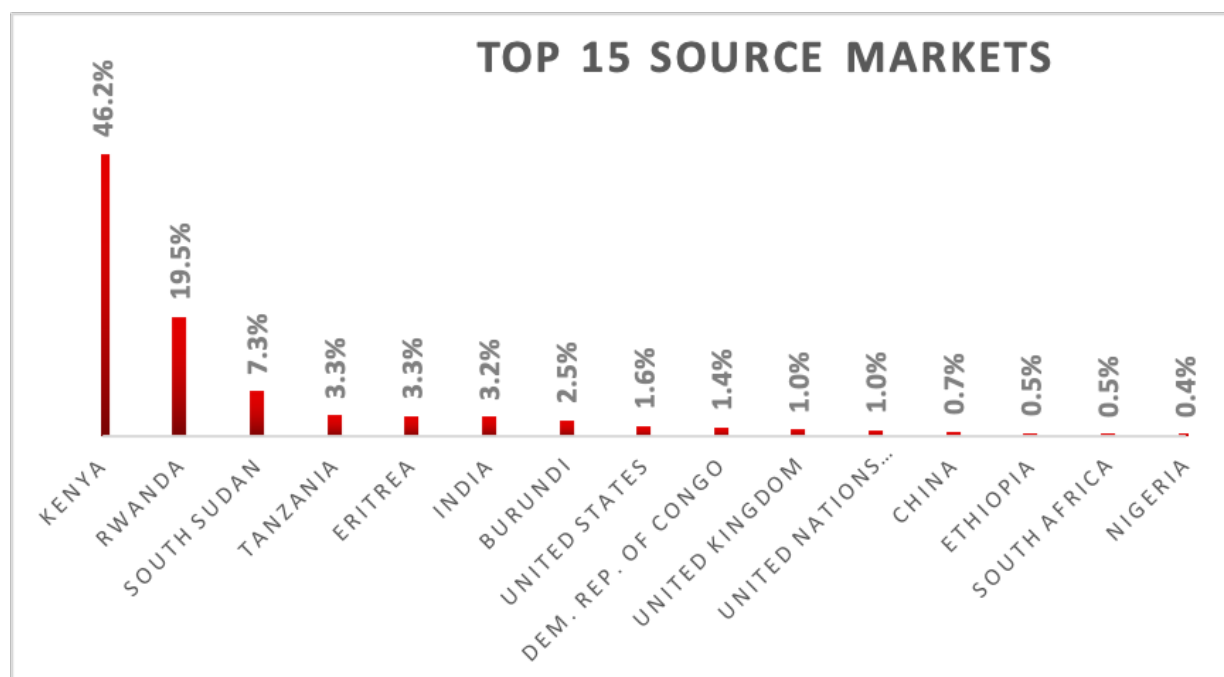


Source: Pisces Data, Ministry of Internal Affairs

4.1.4. Top Tourist Source markets for Uganda

During the year 2022, Uganda's primary sources of visitors were its neighbouring countries (Kenya, Rwanda, South Sudan, and Tanzania), constituting the leading markets. Subsequently, Eritrea and India featured significantly as source markets. Notably, the United States of America, United Kingdom, and China occupied the 8th, 10th, and 12th positions, respectively, among Uganda's source markets in 2022.

Figure: 6 Top 15 Source markets for Uganda



Source: Pisces Data, Ministry of Internal Affairs

The Top 10 primary Overseas Source Markets in 2022 were India, USA, United Kingdom, China, Germany, Canada, Pakistan, Netherlands, France and Ireland

4.1.5. Contribution to the Economy

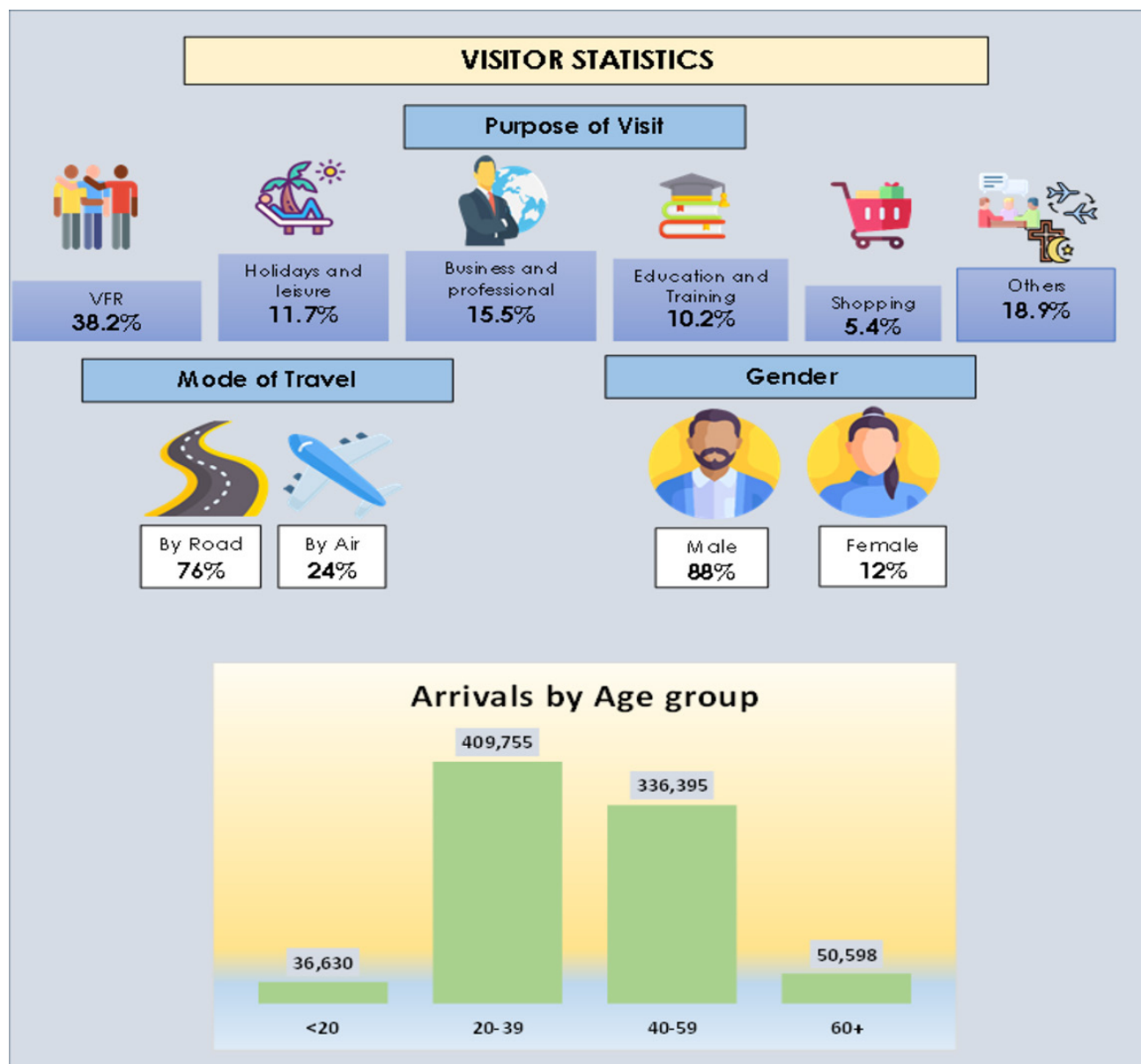
	<div> <div>\$</div> <div>Total GDP contribution:</div> </div>		<div> <div>Person Icon</div> <div>Total Travel & Tourism jobs:</div> </div>	
2019	5.9% (of Total Economy) UGX 9,110.4BN (USD 2.5BN)	Change in 2020: -54.5%	0.67MN =4.2% (Share of Total Jobs)	Change in 2020: -24.2%
2022	4.7% UGX 7,916.1BN (USD 2.1BN)	Annual Change: +31.2% (-13.1% vs 2019) Economy Change: +5.1%	0.62MN =3.5%	Annual Change: +14.9% (-7.8% vs 2019)

According to WTTC, Tourism contributed USD. 2.1 billion to the economy of Uganda in 2022. This is equivalent to 47% of the country's GDP. This is still USD. 400 million less than the 5.9% GDP contribution the sector made in 2019.

In terms of employment, Tourism contributed 620,000 direct jobs in 2022, which translates to approximately 3.5% of the total employment in Uganda.

4.1.6. Arrival Demographic Statistics (Main Purpose of Visit, Mode of Travel, Gender, Age group)

Figure: 7 Demographic Statistics 2022



Reconnecting with Friends & Relatives and doing business were the top two reasons why tourists came to Uganda in 2022, accounting for 38.2 percent of the total and 15.5 percent, respectively. One in ten visitors to Uganda in 2022 did so for Leisure and Holiday.

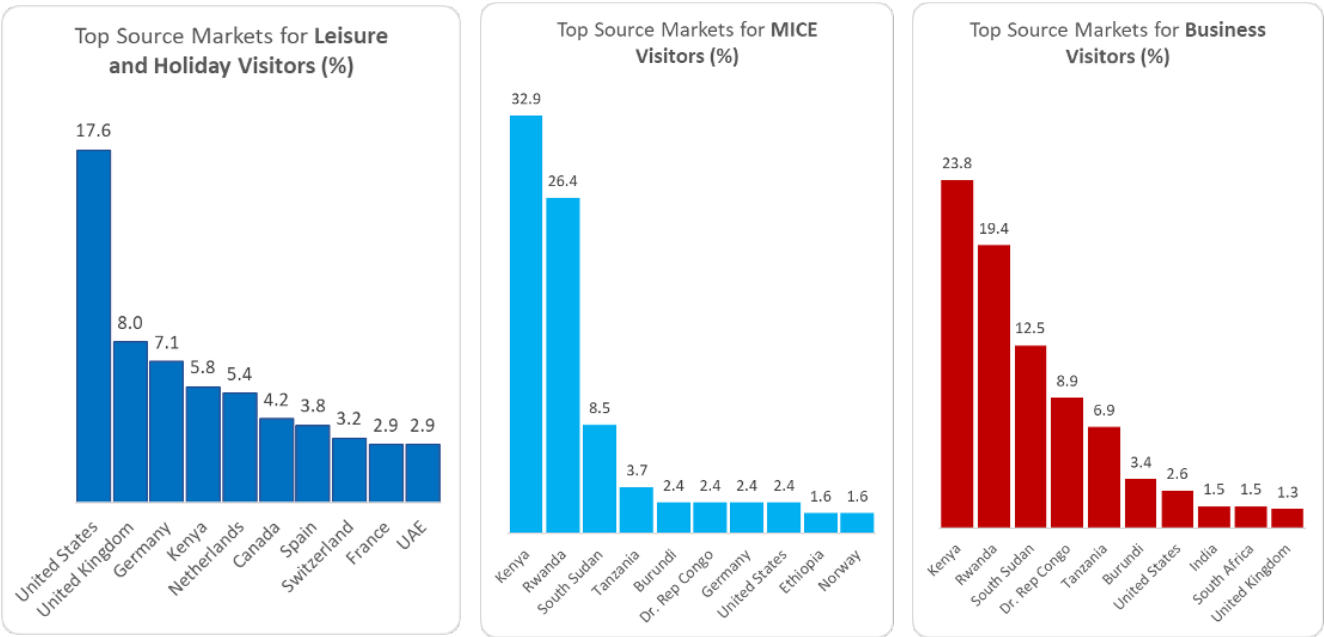
The majority of visitors to Uganda came by road (76 percent), while only 24 percent came by air, through Entebbe International Airport. 88 percent of the arrivals were male, while only 12 percent were female.

The majority of tourists that came to Uganda were in the 20 – 39 years age group. These represented 49 percent of total arrivals. This was followed by 40 – 59 years (40 percent), Above 60 years (6 percent). Those below the age of 20 made up only 4 percent.

Examining the source markets based on the purpose of visits, it becomes evident that the primary origins of leisure and holiday visitors are the USA and the United Kingdom. Additionally, there's a presence of leisure travelers from diverse countries like Germany, Kenya, Netherlands, Canada, and Spain.

Conversely, when considering Meetings and Conferences, as well as Business-related visits, the dominant contributors are the member states of the East African Community (EAC), highlighting their importance in these sectors.

Figure: 8 Top Source Markets by Purpose of Visit, 2022



Source: Pisces Data, Ministry of Internal Affairs

4.1.7. Visitation to National Parks and other Select Attraction Sites

The number of visitors to Uganda’s selected tourist sites, encompassing National Parks, the Source of the Nile, Museums, and UWEC, achieved a complete recovery, returning to the levels witnessed in 2019 during the year 2022. The visitor numbers surged from 906,961 in 2019 to reach an impressive 1,060,354 visitors in 2022. This signifies a notable growth of 15.2 percent in visitation during 2022 when compared to the figures of 2019.

Of note, UWEC and the Uganda Museum experienced the most substantial increases in visitor numbers in 2022 as compared to the records of 2019.

In the year 2022, the number of visitors to National Parks nearly doubled, surging from the recorded count of 189,988 visitors in 2021 to reach a remarkable total of 367,869 visitors. This upswing represented a significant 93.6 percent increase in visitation compared to the preceding year.

Prior to the onset of the COVID-19 pandemic, there was a noticeable upward trajectory in the number of visitors to National Parks, peaking at 325,345 visitors in 2018. However, the year 2020 witnessed a sharp decline of -68.7 percent in National Park visitation, plummeting from the previous year’s tally of 323,861.

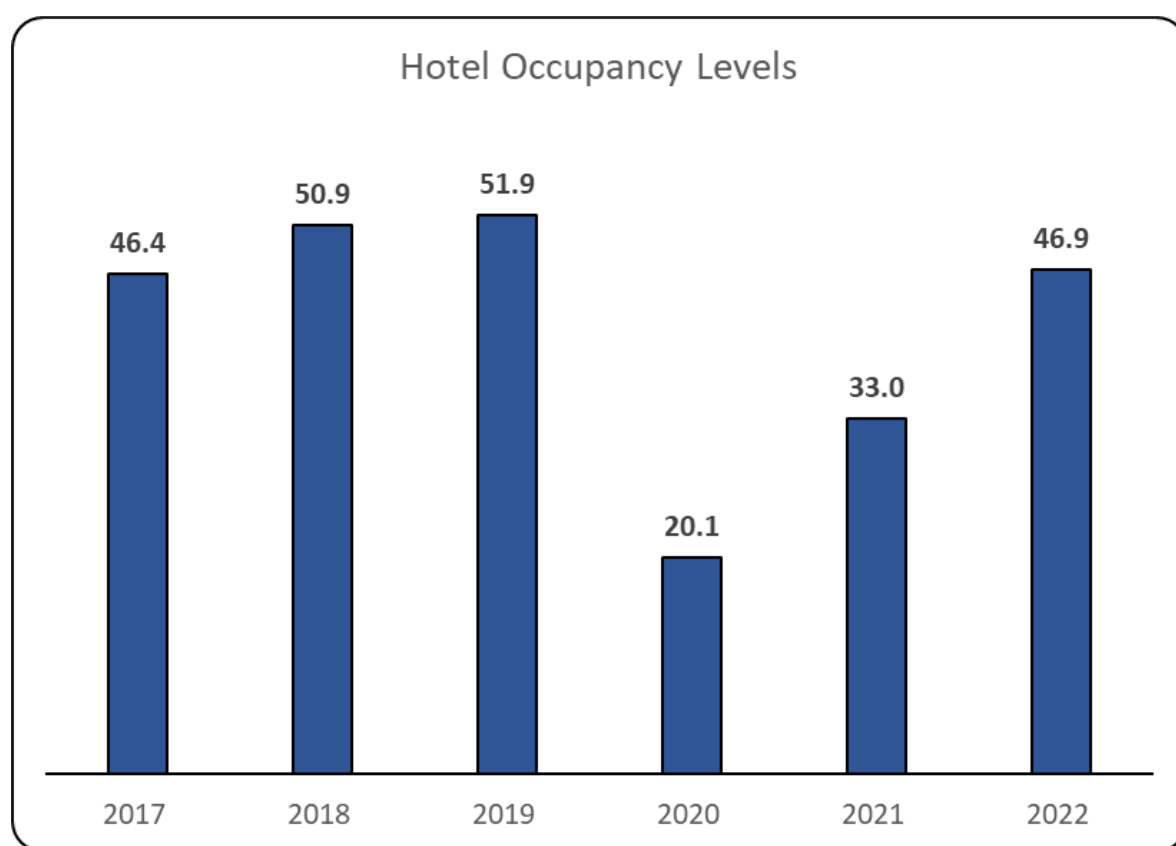
Table: 1 Visitors to selected Tourist attraction Sites in Uganda

Attraction Site	Year					%	% Recovery
	2018	2019	2020	2021	2022		
Uganda Museum	54,378	55,426	3,910	2,883	67,366	6.4%	21.5
UWEC	364,121	383,398	67,789	131,117	486,464	45.9%	26.9
SON	163,117	157,925	28,128	48,316	138,655	13.1%	-12.2
National Parks	325,345	323,861	101,331	189,988	367,869	34.7%	13.6
Total	906,961	920,610	201,158	372,304	1,060,354	100%	15.2

Source: MTWA Statistical Abstract, 2022

4.1.8. Hotel and Accommodation Statistics

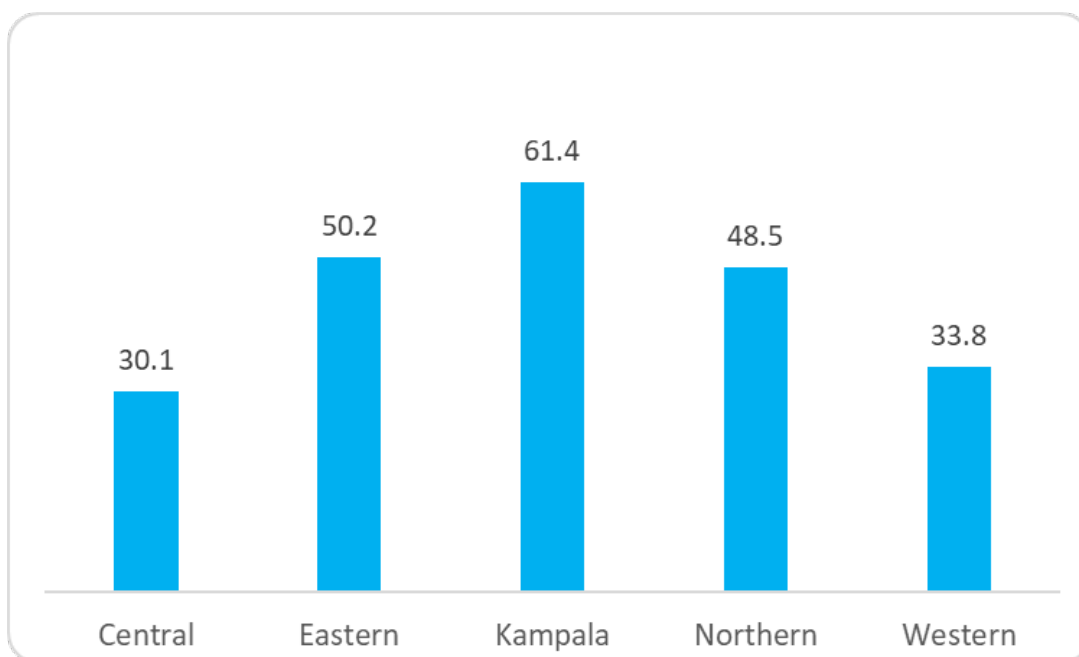
The occupancy rate for hotels during the year 2022 was 46.9%. Hotel occupancy peaked in 2019 at 51.9 percent, but it then witnessed a sharp decrease, reaching its lowest level in 2020 at 20.1 percent. From the 33 percent occupancy documented in 2021 to the present 46.9 percent recorded in 2022, the occupancy levels showed a recovery pattern in the following years.

Figure: 9 Hotel Occupancy Levels, 2017–2022

Source: MTWA Statistical Abstract, 2022

Additionally, in 2022, the peak of hotel occupancy was observed in the Kampala region, reaching a substantial 61.4 percent. Following closely were the Eastern and Northern regions, reporting occupancy rates of 50.2 percent and 48.5 percent respectively. On the contrary, the lowest hotel occupancy rates were recorded in the Central Region and Western regions, both standing at 33.8 percent in the year 2022.

Figure: 10 Distribution of Hotel Occupancy by Region



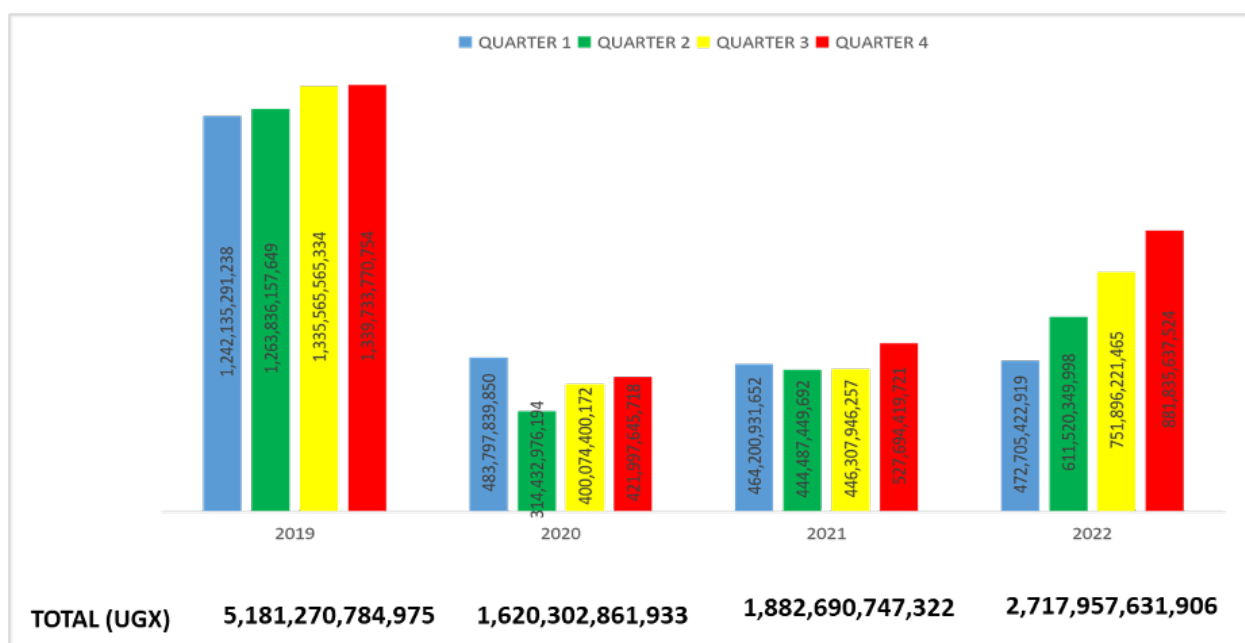
Source: MTWA Statistical Abstract, 2022

4.1.9. Performance of Tourism Training Institutions

5.1.0 Tourist Expenditure in Uganda

In 2022, the expenditure by non-resident visitors within Uganda, known as inbound tourism expenditure, contributed significantly to the economy. The earnings from Tourism/visitor exports amounted to UGX 2,718.0 billion (equivalent to USD 0.736 billion), accounting for 12.2 percent of the total exports and 41.4 percent of service exports in that year. This marked a substantial growth of 44.4 percent in visitor exports from the previous year, although there was still a notable decline of 47.5 percent compared to the levels recorded in 2019.

Figure: 11 Visitor Exports, 2019–2022

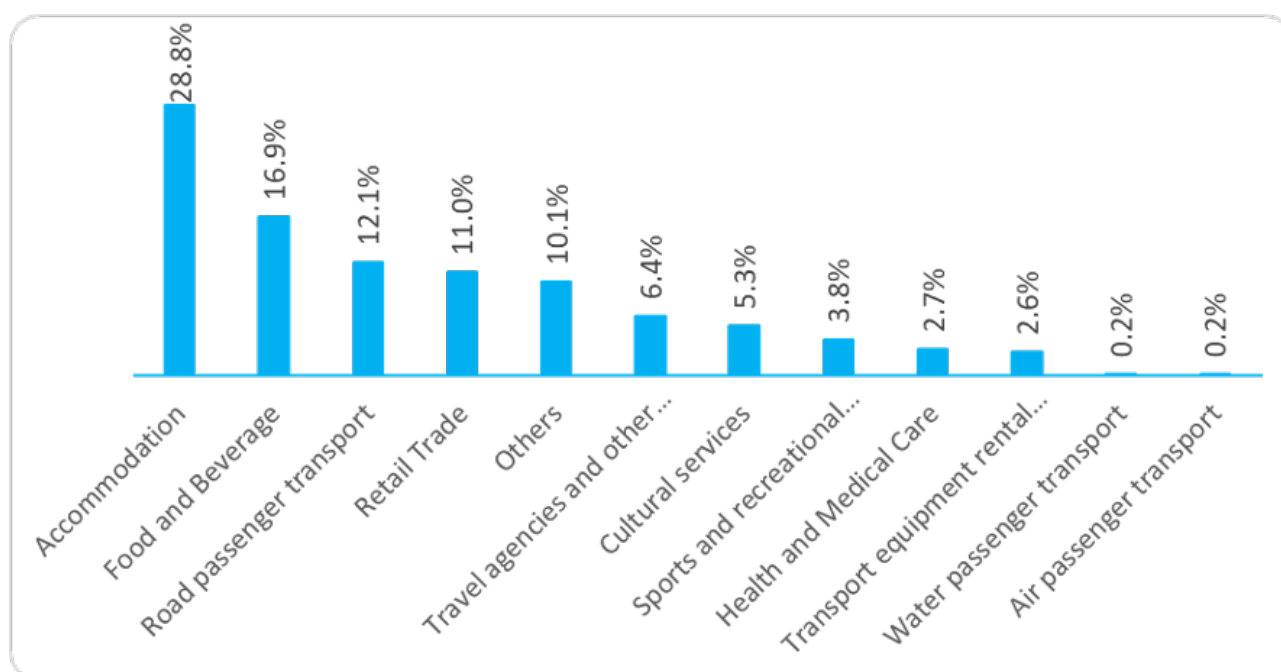


Source: Tourism Satellite Account, 2019

5.1.1 Tourism Expenditure by Spending Category

The four main products in Inbound Tourism Expenditure were Accommodation, Food and Beverage, Passenger transport and retail trade with a combined share of 68.8 percent in 2022. This means 68.8 cents of every dollar/shilling by inbound visitors is spent on Accommodation, Food, Transport and Retail Trade. For every dollar/shilling spent by international tourists, 29 cents is spent on Accommodation, 17 cents on Food and Beverage, 12 cents on Passenger Transport and 11 cents on Shopping. 99.8% of expenditure from Inbound visitors was from overnight visitors/Tourists (UGX 2,712.3 bn). Same day Visitors spent UGX 5.7 billion mostly on Road Passenger Transport (48 percent) and Food and Beverages (25 percent).

Figure: 12 Distribution of Tourism Expenditure, 2022



Source: Tourism Satellite Account, 2019



Launch of the Maiden Uganda Tourism Satellite Account at Sheraton Hotel

5. FINANCIAL AND REVENUE PERFORMANCE, FY 2022/23

5.1. DIRECTION OF PROGRAMME FINANCING OVER THE NDP III PERIOD: A CASE OF MTWA MDAS

Over the NDP III period of 5 years (FY 2020/21 – 2024/25), the Ministry and Agencies were tasked to deliver on various interventions as detailed in the Programme Implementation Action Plan at a cost of Ushs 2,906 trillion. In the first 3 years, a cumulative total of Ushs 576 billion was approved as GOU funding and this includes Ushs 238 billion Non-Tax Revenue collections from MTWA MDAs for the 3 years.

In addition to the above GOU funding, two major World Bank Funded projects have been implemented.

The Competitiveness and Enterprise Development Project (CEDP – AF) which has supported the implementation of interventions at UWEC, UWA, UHTTI, UTB and MTWA at a cost of Ushs 20 billion over the 3 years of NDP III period.

Investing in Forests and Protected Areas for Climate Smart Development (IFPA-CD) which has provided funding amounting to Ushs 10 billion during the FY 2022/23.

Table: 2 Annual GOU approved funding against NDP III plans for MTWA and Agencies

MDA	Annualized Funding (Billions)								
	2020/21			2021/22			2022/23		
	NDP III Requirement	Approved GOU Funding	%ge	NDP III Requirement	Approved GOU Funding	%ge	NDP III Requirement	Approved GOU Funding	%ge
MTWA	57.8	27.1	47%	154.2	21.0	14%	279.9	41.8	15%
UHTTI	17.0	6.9	41%	44.6	5.7	13%	41.2	10.0	24%
UTB	22.9	26.8	117%	66.5	17.7	27%	81.0	26.5	33%
UWA	136.5	119.5	88%	149.5	119.5	80%	188.1	106.7	57%
UWEC	21.0	13.2	63%	26.5	11.9	45%	34.7	10.9	31%
UWRTI	10.0	3.9	39%	10.7	3.2	30%	10.0	3.5	35%
Grand Total	265.2	197.5	74%	452.0	179.0	40%	634.9	199.3	31%

The table above presents the funding levels and reveals a clear mismatch between the expected and the approved annual funding for each of the MDAs.

The NDP III had envisaged progressive increase in funding and performance from year 2 as as the implementation of key projects and interventions shifts from preparatory phase and contracting to take-off state (investment and massive activity rollout) in the following years e.g the massive roll-out of the brand; the upgrade of protected areas; massive investment in tourism products such as mountaineering; water-based products including the Source of the Nile, Hotsprings and water falls; the Convention Centre; modernisation and expansion of UWEC; Upgrade of Training institutions (UWRTI and UHTTI); Cultural heritage sites development; among others.

The continued increase in the requirement-funding gap has disrupted the implementation of the planned interventions in all MDAs. As indicated in the Table 5.1 above, only 31% of the expected funding was approved in the FY 2022/23. This has had a huge impact on the realisation of the NDP III planned targets for the FY 2022/23. Only 56% of the output-level targets were achieved as detailed in the section 5.4.

In an effort to ensure realistic plans and maximise on the remaining 2 years of the NDP III, the National Planning Authority spearheaded an exercise to reprioritise the interventions with focus on scaling them down to match with the anticipated fiscal space of the Government for the financial years 2023/24 and 2024/25.

5.2. FINANCIAL PERFORMANCE BY MTWA AND AGENCIES, FY 2022/23

A total of Ushs 199.347 billion was approved for spending by the MDAs during the financial year. Out of this, Ushs 180.637 was released as detailed in Table 3 below.

Table: 3 MDA Specific budgets, FY 2022/23

Vote	MDA	Approved FY 2022/23 (including supplementary)	Released/Realised	%ge release
Vote 022	UWEC	10,857,000,000	10,857,000,000	100%
	UHTTI	10,031,200,000	10,031,200,000	100%
	UWRTI	3,485,357,287	3,485,357,287	100%
	UWA	106,749,303,391	106,749,303,391	100%
	MTWA	41,770,823,725	30,629,257,613	73%
Vote 117	UTB	26,454,088,208	18,885,000,000	71%
	GRAND TOTAL	199,347,772,611	180,637,118,291	91%

It is important to note that out of the above, a total of Ushs 68 billion was collected and utilised by UWA at source.

5.3. FINANCIAL PERFORMANCE BY SUB-PROGRAMME

The analysis on Subprogramme financial performance is limited to Votes 022 and 117 which cover MTWA and Agencies.

Table: 4 Distribution of funding FY 2022/23 by Sub-programme

	Sub-programme	NDP III Planned FY 2022/23 (Bn Ushs)	Approved budget FY 2022/23 (Bn Ushs)	
1	Marketing and Promotion	73.54	24.5	33%
2	Infrastructure, Product Development and Conservation	446.70	140.3	31%
3	Regulation and Skills Development	114.66	34.5	30%
	TOTAL FOR THE PROGRAMME (Limited to Votes 022 & 117)	634.90	199.3	31%

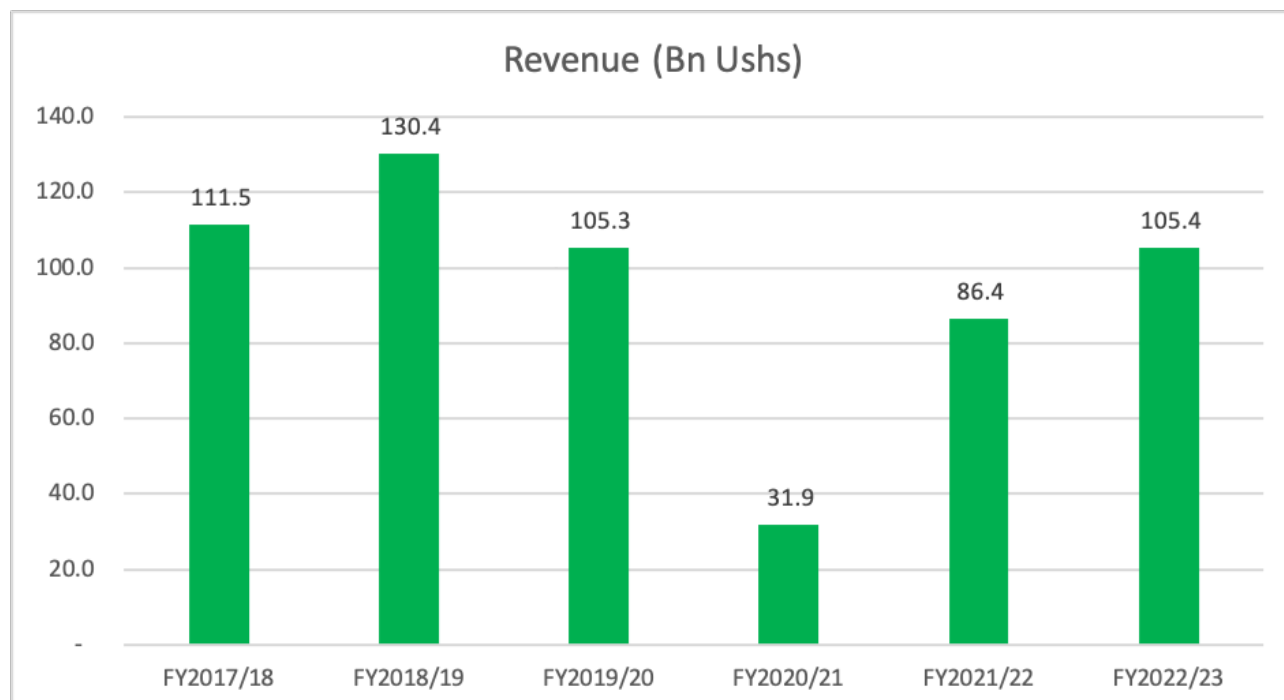
In absolute terms, the Sub-programme of Infrastructure, Product Development and Conservation took a significantly larger share of the funding through MTWA and Agencies. This is mainly because of the wildlife conservation element of management, maintenance and surveillance for all Uganda's 10 National Parks and 12 Wildlife Reserves.

In contrast, the Marketing and promotion subprogramme took only Ushs 24.5 billion out of the approved budget of 199 billion. These are the funds available for supporting all the tourism marketing and promotion including sustaining the human resources in place, domestic tourism promotion activities as well all the rollout of the brand in the international market among others.

5.4. TREND IN NON-TAX REVENUE GENERATION BY MDAS, FY 2018/19 – FY 2022/23

The Ministry MDAs internally generated UGX 105.3 billion in FY 2022/23, an increase by Ushs 19 billion from the collections in the previous FY 2021/22.

Figure: 13 Revenues generated by the Tourism development Programme, FY2017/18 to FY2022/23



Source: Annual Budget Performance reports for MDAs, FYs 2017/18 – 2022/23

Over the past six years, the lowest collections were recorded in FY 2020/21 at the peak of COVID-19 pandemic while the highest were in FY 2018/19 where Ushs 130 billion was generated. In fact, this high performance was unprecedented as it was the highest collection ever made in a single financial year ever since the establishment of the Ministry or Agencies.

With continued implementation of tourism interventions aimed at full recovery and further growth, coupled with a conducive environment, it is projected that the FY 2018/19 performance will be surpassed in the FY 2023/24. The Ministry and Agencies are committed to increase the Non-Tax Revenue collections to Ushs 210 billion by the financial year 2028/29.

5.4 Non-Tax Revenue generation by individual MDAs during the Financial Year.

Various Tourism Development Programme MDAs collect Non-Tax Revenue. For the MDAs under MTWA, a total of Ushs 105.3 billion was collected against a target of Ushs 92.8 billion for the FY 2022/23. This translates into 113 percent performance and this relatively good performance is attributed to higher-than-projected rate of recovery of Uganda's Tourism.

Specifically, this good performance is attributed to;

The intensified marketing efforts both domestically and abroad that led to the increase in the number of visitors to National Parks that nearly doubled from 189,988 in 2021 to 367,869 in the year 2022; Increase in visitation to Uganda Museum from 2,883 visitors in 2021 to 67,366 in the year 2022; and UWEC visitation that increased from 131,117 people in 2021 to 486,464 in the year 2022.

Improvement of infrastructure and facilities in protected areas-accommodation facilities, domestic tourism buses and boats.

The continued easing of payment procedures including the establishment of digital payment platforms for services.

Enhancements in product offerings at UWEC, Protected Areas as well as expansion of services including the accommodation facilities.

Full resumption of operations at UWRTI and UHTTI.

The Uganda Wildlife Authority contributed the highest i.e 93 percent of the total revenue collections.

Table: 5 Non-Tax Revenue performance by MDA

	FY2018/19 Actual	FY2020/21 Actual	FY2022/23 Projection	Actual	%ge performance (Actual Vs Target)
UWA	124.313	28.809	88.128	98.414	112%
UWEC	4.033	1.576	2.420	3.844	159%
UHTTI	1.596	0.968	1.596	2.139	134%
UWRTI	0.311	0.500	0.311	0.308	99%
UTB			0.300	0.332	111%
MTWA-Museums & Sites	0.177	0.022	0.106	0.331	312%
Grand Total	130.431	31.876	92.862	105.369	113%

It can be observed from Table 5 above that three MDAs i.e UTB, UHTTI and Museums surpassed the pre-COVID-19 revenues by significant margins while UWA, UWEC and UWRTI are yet to fully recover.

Financial sustainability is critical for the advancement of Uganda's tourism. The country is still largely reliant on nature-based tourism products and the funding of wildlife management and conservation interventions is heavily dependent on revenue collections from tourism activities in Protected Areas.

These facts compel the MDAs to unceasingly continue to dedicate effort and commitment to generate more Non- Tax Revenue against which a case for enhanced GOU funding is easily justified.



White water Rafting on the Nile

6. PHYSICAL PERFORMANCE OF THE TOURISM DEVELOPMENT PROGRAMME

6.1. OVERALL PHYSICAL PERFORMANCE

The Tourism Development Programme consists of 110 indicators (23 at outcome level and 87 at output level) as shown in Table 6 below. Overall, 57 percent of the indicators were achieved by end of FY2022/23 while 36 percent were not achieved. This performance is largely attributed to the gross underfunding where the funding levels are way below the NDP III planned funding against which the targets were hinged. In FY 2022/23, only 31 percent of the planned funding was approved which could mainly cover the fixed costs of wage, gratuity, rent, animal welfare, Protected Area management as well as sustenance of training institutions.

Table: 6 FY 2022/23 Programme performance Score card

Level	Achieved		Not Achieved		No assessment		Total
	Indicators	%	Indicators	%	Indicators	%	
Outcome level	13	57%	10	43%	0	0%	23
Output level	44	51%	30	34%	13	15%	87
Overall Performance	57	52%	40	36%	13	12%	110

Key

Achieved - The annual target has been attained

Not achieved – The annual target has not been achieved

No assessment – Performance against target not established either due to lack of indicator target for the FY 2022/23 or lack of data on progress.

6.2. PROGRAMME OUTCOMES AND THE PERFORMANCE AGAINST THEIR TARGETS



The Tourism Development Programme interventions are focused on the delivery of the following 5 outcomes.

Performance of the Tourism Development Programme over the Financial Year, FY2022/23 by Outcomes.

Table 2 below shows the Programme outcome level performance. As shown, performance was higher under outcome 3 and 4 scoring 43 percent and 33 percent respectively.

Table: 7 Outcome Level performance Score card

Key Result Area	Achieved	Not Achieved	No assessment	Denominator (No of indicators)
1. Increased Tourism Receipts	25%	75%	0%	8
2. Accessibility to Tourism Goods and Services	67%	33%	0%	3
3. Improved Wildlife Ecosystems	57%	43%	0%	7
4. Increased Employment/Job Creation along the Tourism Value Chain	100%	0%	0%	3
5. Improved Compliance to Tourism Service Standards	100%	0%	0%	2
Overall Programme Performance	57%	43%	0%	23

Performance against each Outcome indicator

Programme Objective: Promote domestic and inbound tourism

Outcome: Increased tourism receipts

Indicator	NDP III Target FY2022/23	Actual performance FY2022/23	Rating
1.1 Contribution of Tourism to GDP (%)	8	4.7	Not Achieved
1.2 Annual Foreign exchange earnings (USD - Bn)	1,689	0.729	Not Achieved
1.3 Average Inbound tourism revenues per leisure tourist (USD)	1,361	1,550	Achieved
1.4 Number of International Tourist arrivals from the U.S., Europe and China	260,000	46,743	Not Achieved
1.5 Number of direct flight routes to Europe and Asia	12	7	Not Achieved
1.6 Average annual Hotel occupancy rate (room occupancy rate, %)	52	46.9	Not Achieved
1.7 Tourism arrivals	1,706,563	814,508	Not Achieved
1.8 Number of Ugandans visiting key tourist attractions	828,971	1,012,129	Achieved

Programme Objective: Increase the stock and quality of tourism infrastructure

Outcome: Improved accessibility to tourism goods and services

Indicator	NDP III Target FY2022/23	Actual performance FY2022/23	Rating
2.1 Length of stay/ overnights in all types of accommodation	8	8	Achieved
2.2 Proportion of leisure to total tourists (%)	28%	11.7%	Not Achieved
2.3 Accommodation Capacity (No. of rooms)	161,161	350,550	Achieved

Programme Objective: Develop, conserve and diversify tourism products and services

Outcome: Improved Wildlife Ecosystems

Indicator	NDP III Target FY2022/23	Actual performance FY2022/23	Rating
3.1 Population of Elephants	7,227	7,975	Achieved
3.2 Population of Antelopes	160,175	175,590	Achieved
3.3 Population of Lions	621	493	Not Achieved
3.4 Population of Mountain Gorillas	532	459	Not Achieved
3.5 Incidences of human Wildlife Conflicts (number)	1,348	6,999	Not Achieved
3.6 Number of visitors to Museums and cultural sites	104,888	147,799	Achieved
3.7 Number of visitors to National Parks and UWEC	800,016	858,409	Achieved

Programme Objective: Develop a pool of skilled personnel along the tourism value chain and ensure decent working conditions

Outcome: Increased employment/ jobs created along the tourism value chain

Indicator	NDP III Target FY2022/23	Actual performance FY2022/23	Rating
4.1 Contribution of tourism to total employment (%)	7.5%	14.7%	Achieved
4.2 Visitor satisfaction (%)	76	79	Achieved
4.3 Number of people directly employed along the tourism value chain	290,000	1,559,147	Achieved

Programme Objective: Enhance regulation, coordination and management of the tourism

Outcome: Improved compliance to Tourism service standards

Indicator	NDP III Target FY2022/23	Actual performance FY2022/23	Rating
5.1 Visitor satisfaction (%)	76	79	Achieved
5.2 Level of Compliance to Tourism Service Standards (% enterprises)	50	55	Achieved

4.4 Sub-Programme results against annual targets - Output Level Performance

Output level performance Score card

Table: 8 Output level performance Score card

Sub-Programme	Achieved	Not Achieved	No assessment	Denominator (No of indicators)
1. Promote domestic and inbound tourism	61%	30%	9%	23
2. Infrastructure, Product Development and Conservation	44%	33%	22%	45
3. Regulation and Skills Development	53%	42%	5%	19
Overall output-level performance	51%	34%	15%	87

Key

Achieved - The annual target has been attained

Not achieved – The annual target has not been achieved

No assessment – Performance against target not established either due to lack of indicator target for the FY 2022/23 or lack of data on progress.

6.2.1. Sub-programme 1: Promote domestic and inbound tourism

Programme Objective: Promote domestic and inbound tourism

Interventions:

- 1.1** Review and implement a national tourism marketing strategy targeting both elite and mass tourism segments
 - Brand Image: Build a positive and competitive image of the destination by increasing market presence in key source markets and improving destination awareness in domestic and key source markets
 - Build Market Structures to promote access to Source Markets through trade representation and Tourism Information centres
 - Establish a Market Intelligence Framework to monitor trends and status of Tourism Growth
- 1.2** Develop international, regional and domestic connectivity with countries already attracting large numbers of tourists and for domestic markets. In particular, upgrade and expand Entebbe airport and regional aerodromes
- 1.3** Develop a more robust public/ private sector system to collect and analyse information on the industry in a timely fashion. In particular, establish partnerships with domestic, regional and international airlines/ carriers
- 1.4** Upgrade handling and negotiation capacity of frontier services and foreign intermediaries
 - Train Ugandan diplomats to support tourism marketing and handling, and Visa/ consular staff in customer care; am
 - Introduce mechanisms to allow online purchase or pre-approval of visas

Table: 9 Performance against targets under domestic and inbound tourism Promotion

#	Output/ Actions	Indicators	NDP III Target FY2022/23	Actual performance FY2022/23	Rating	Lead MDA	Remarks
Intervention 1.1: Review and implement a national tourism marketing strategy targeting both elite and mass tourism segments							
1	National Tourism Marketing Strategy developed	Tourism Marketing strategy developed	Yes	No	Not Achieved	UTB	The process has started. To be completed in FY 2023/24
2		Level of implementation of the National tourism marketing strategy, %	100		No assessment	UTB	The National Marketing Strategy is not yet in place
3	Brand manual, logos, slogans and materials developed, produced and rolled out.	Proportion of Ugandan enterprises associating with Uganda's brand, %	15	20	Achieved	UTB	
4		Number of 360 roll-out campaigns done in the regional and international source markets	4	3	Not Achieved	UTB	
5		Number of 360 roll-out campaigns done in the domestic market	4	4	Achieved	UTB	
6	Promotional materials such as notebooks, flash disks, shirts, fliers etc.	Number of tourism promotional materials produced, ('000s)	60	57	Not achieved	UTB	UTB produced 57,415 pieces.
7	Domestic tourism intensified with domestic tourism initiatives	No of domestic drives / campaigns conducted	6	6	Achieved	UTB	
8	including drives/ campaigns	Number of Ugandans Visiting Tourist sites (National Parks, Museums and UWEC)	531,668	697,204	Achieved	MTWA	
9	Digital marketing implemented	Number of digital marketing campaigns undertaken in the source markets	6	7	Achieved	UTB	Explore Uganda digital marketing campaign undertaken raising 572 million impressions and reaching over 60 million unique users.
10		Number of products with digital marketing Materials developed	1	3	Achieved	UTB	Uganda Museum, UWEC, National Parks.
11	Market Destination Representative firms hired and deployed in key markets	Number of MDR firms contracted in key source markets	10	2	Not Achieved	UTB	Two Market Destination Representatives contracted to support marketing activations in Africa.
12	Information centers designed and constructed in designated tourism development	Number of information centers constructed/ established (cumulative)	2	2	Achieved	MTWA	-Pakwach Tourism Information Centre. - Kampala Tourism Information Centre at Sheraton.
13	Destination management system developed.	Level of development of the Destination Management System, %	30	0	Not Achieved	UTB	
14	Market Intelligence Framework	Market Intelligence Framework in place	Yes	Yes	Achieved	UTB	
Intervention 1.2: Develop international, regional and domestic connectivity with countries already attracting large numbers of tourists and for domestic markets. In particular, upgrade and expand Entebbe airport and regional aerodromes							
15	Regional aerodromes developed	No. of regional aerodromes developed (Arua, Gulu, Kidepo, Pakuba, and Kasese)	1	0	Not Achieved	MoWT	

16	Entebbe airport up-grade completed	Number of airlines with flights into Uganda	15	16	Achieved	UCAA	
17		Number of direct flight routes to America, Europe, Asia, etc.	12	14	Achieved	UCAA	
18	Domestic tourists increased	No. of domestic tourists, millions	1.04	2.42	Achieved	MTWA	
Intervention 1.3: Develop a more robust public/ private sector system to collect and analyse information on the industry in a timely fashion. In particular, establish partnerships with domestic, regional and international airlines/carriers							
19	Tourism Information Management System developed	Level of development of the Tourism Information Management System, %	30	50	Achieved	MTWA	System Development and Integration stage completed; the operational Acceptance Testing underway.
Intervention 1.4: Upgrade handling and negotiation capacity of frontier services and foreign intermediaries							
20	Ugandan diplomats and Visa/consular staff trained to support tourism marketing and handling and in customer care.	Number of Ugandan diplomats and Visa / consular staff trained to support tourism marketing and handling and in customer care (all missions abroad)	200	146	Not achieved	MoFA	UTB undertook destination training for 40 Uganda Mission staff.
21	Mechanisms introduced to allow online purchase or pre-approval of visas	e- visa operational	Yes	1	Achieved	MoA, MoFA	
22		Proportion of Visas pre-approved or purchased online, %	50	50	Achieved	MoA, MoFA	At least 50% are applied online.
23	Improved coordination with intermediaries	Global tourism competitiveness	97/136		No Assessment	WEF	

Sub-programme 1: Promote Domestic and Inbound Tourism

During the financial year, the following were realised;

1. Domestic tourism campaigns “Explore Uganda” conducted in the regions of Eastern, Northern, Western and South Western in a bid to highlight the tourism potential of the regions as well as show the domestic tourism Market what these Circuits have to present.
2. The Campaigns managed to have maximum reach through social media engagements that saw the #ExploreElgon get maximum visibility and still getting the same visibility. Cultural aspects of the regions were showcased in the Imbalu dance, key attractions spotlighted like the Mugaba palace, Agro-tourism, Jinja Bridge, Wanale Hill, Queen Elizabeth, Murchison Falls National Park, as well as the Sipi Falls not forgetting the Nightlife. The campaigns increased local business. Conducted familiarization tours and produced destination campaign and tourism promotional content with key influencers including African travel social media influencers (Wode Maya and Ms. Trudy), renown sports tourism enthusiast, Rob Walker, among others.
3. Commemorated international and national days for increased domestic tourism arrivals across Uganda in partnership with tourism stakeholders i.e. Uganda Martyrs’ day, Uganda Film Festival, World Tourism Day, 2023 World Wildlife Day and Independence Day.
4. Established partnership with Uganda Hotel Owners Association (UHOA) for joint tourism promotion, standards enforcement and skilling; Ministry of Education & Sports to promote sports tourism.
5. Religious and film tourism were promoted during the Uganda Martyr’s Day celebrations and Uganda Film Festival respectively, in partnership with Church of Uganda and Uganda Communications Commission
6. Destination and brand immersion training was conducted for Missions staff in Spain, Kenya, Mombasa, United Kingdom, South Africa, Germany and Russia
7. Explore Uganda brand was rolled out in ten markets at 17 expos and two roadshows i.e. Experience Africa Travel Show, IMEX Frankfurt, Uganda Canada Convention, AviaDev, Magical Kenya Tourism Expo, United States Tour Operators Association (USTOA) Annual Conference and Marketplace, Kenya-Uganda Tourism Business Summit in Mombasa, IBTM Barcelona, World Travel Market London, Africa Hotel Investment Forum (AHIF), Uganda South Africa Summit, Meetings Africa 2023, EAC Tourism Expo, ITB Berlin, Moscow International Travel & Tourism Exhibition, Uganda tourism roadshows in Munich, Germany and Johannesburg, South Africa.

8. Explore Uganda destination promotional video won three film awards from prestigious world film festivals i.e. International Committee of Tourism Film Festivals (CIFFT) 2022 in Valencia Spain, Zagreb Tour film Festival in Serbia and Cannes Media Film Festival in France
9. Explore Uganda brand gained international visibility on CNN where Uganda was recognised as one of the top 23 destinations to visit in 2023
10. Uganda's investment opportunities were promoted at the Africa Hospitality Investment Forum (AHIF) 2023 and AviaDev 2023 in Kenya with a focus on investment in the hospitality industry, international hotel chain development and tourism air connectivity
11. Uganda's Tourism products promoted in 9 domestic and regional tourism events and the Elgon Campaign conducted covering Elgon Cultural Festival (Food, dance, music, exhibition of crafts); 3 Hills Challenge; Taryet marathon with the Champions among others.
12. Explore Uganda digital brand campaign raised over 1.6 million views on YouTube, Google display ads earned 572 million impressions and 381,000 website clicks, brand web site earned 441,000-page views. The campaign hashtag earned over 1 billion impressions and reached over 150 million unique users.
13. Destination promotion content provided for Uganda Airlines inflight magazine "N'gaali" (Dec 2022-Feb 2023) and "Safari Uganda" media campaign produced and aired on nation media channels (print and broadcast) for the festive season
14. Coordinated the Uganda-Mombasa tourism conference and exhibition held in Mombasa, Kenya; Supported organization of a familiarization tour across Uganda for a delegation of 30 Kenyan tour operators in partnership with Uganda Tourism Association.
15. Produced and disseminated tourism articles and stories on Uganda's tourism offerings in the Kenyan, East African and regional media channels and 57,000 pieces of branded promotional materials produced and disseminated.
16. 25 digital kiosks were received from the Hungarian Government and deployed for tourism promotion at strategic locations within Kampala and Wakiso Districts. i.e. the Uganda Museum, KCCA, UWEC, URA, Serena, Mestil & Sheraton Hotels, URA, UTB, etc.
17. Uganda's investment opportunities were promoted at the Africa Hospitality Investment Forum (AHIF) 2023 and AviaDev 2023 in Kenya with a focus on investment in the hospitality industry, international hotel chain development and tourism air connectivity.
18. 6 cities supported with tools and equipment including furniture, ICT equipment to enhance their tourism development efforts Kampala, Mbale, Gulu, Arua, Mbarara and Fort Portal; and Guidelines for the disbursement of the LG conditional grants developed and disseminated.

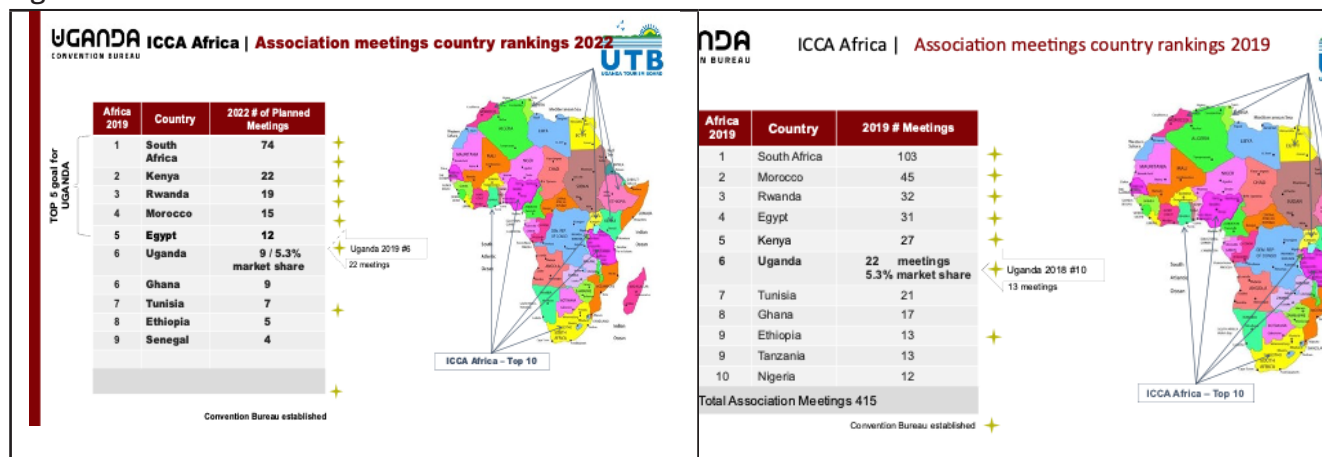
MICE (Meeting Incentives, Conferences and Events)

1. The Uganda Conference Bureau (UCB) secured two bids to host the African Blood Transfusion Conference (ABTC) in March 2024 and the 2025 International Association for Impact Assessment (IAIA); MICE collateral produced; and MICE business opportunities were promoted in four markets at five expos and trade shows i.e. POATE 2023, IMEX Frankfurt, IBTM Barcelona, Uganda South Africa Summit and Meetings Africa 2023.
2. MICE offerings promoted at locally hosted conferences, events and investment summits i.e. 2nd East African Judicial Conference 2022, 3rd international conference on Governance and service in developing economics delivery, Afro – India Trade Investment and Tourism Summit 2022, and South to South Triangular Conference 2023, and Permanent Secretaries Forum.
3. UCB Business Plan 2022-25 developed which targets to achieve \$100 towards GDP targeting to host at least 130 Meetings by 2025 both governmental and Association Meetings
4. Developed MICE implementation strategy 2022- 2025.
5. MICE brand and collateral developed to align with 'Explore Uganda' brand
6. Three global MICE trade shows attended – potential business sourced from these expos stand at approximately US\$ 56 million sourced against target of US\$ 100 million by 2025. These will be advanced through the sales funnel.
7. Theory & Practice of MICE' educational programme developed and commenced roll-out. Presentations have been made to a number of MDAs including URA, Uganda Cancer institute, NPA, Forum for Directors,

Commissioners and Undersecretaries and also 30 officials from different MDAs were trained on MICE. This is an avenue to lobby for the MICE mandate across Government.

8. POATE 2023 (MICE buyers & Seminar); First time, hosted 8 MICE buyers in the country and held a Seminar session facilitated by MICE experts on the continent.
9. Private sector – stakeholder partnerships; Held several meetings with the private sector through UACII (Uganda Association for Conference and Incentive Industry), UTA and UHOA as a way of developing a long-term working relationship in advancing the MICE agenda. Trained 55 DMCs (Destination Marketing Companies) in incentive travel market facilitated by SITE Africa, an association that represents incentive travel market in the world.
10. Support private sector through participation in exhibitions that is; Meetings Africa 2023; 14 companies, IBTM World 2022; 10 companies and IMEX Frankfurt 2023; 10 Companies.

Figure: 14 ICCA RANKING 2022 VS 2019



6.2.2. Sub-programme 2: Infrastructure, Product Development and Conservation

Programme Objective: Increase the stock and quality of tourism infrastructure

Interventions

- 2.1. Expand, upgrade and maintain tourism national transport infrastructure and services
 - Improve the road for southern access to Bwindi National Park
 - Build a bridge across the Nile at Murchison Falls National Park
 - Relocate and upgrade the airstrip at the periphery of Kidepo Valley National Park
 - Expand, upgrade and/or maintain National tourism roads
 - Improve and/or maintain access to Protected Areas
 - Construct/rehabilitate/upgrade marine/water routes including 20 docking piers on Lake Victoria and Lake Albert
 - Develop and improve the roads to cultural heritage sites of Bigo Byamugenyi archaeological heritage, Nyeru, Patiko, Emin Pasha's fort
- 2.2. Support the development and/or upgrade of accommodation and conference facilities of all types and sizes as well as leisure attractions and facilities (including, restaurants, bars and cafes)
 - Increase the number of hotel rooms and food and beverage facilities
 - Facilitate the establishment of International hotel chains
 - Construct a National Convention center to scale up MICE tourism
- 2.3. Support the private sector to provide low-cost accommodation facilities in protected areas
- 2.4. Develop digital capability in the tourism industry to market and improve access to products
 - Provide fast, accessible and reliable internet connectivity all wildlife protected areas and other major tourists' attractions
 - Promote use of e-tourism services
- 2.5. Construct water dams in Toro Semuliki Wildlife Reserve, Lake Mburo National park, Kidepo Valley National

Park, Murchison Falls National Park, Pian Upe Wildlife Reserve and Bokora-Matheniko Wildlife Reserve savannah wildlife protected areas

2.6 Establish trade and service facilities, including; insurance, banking, sports and recreation, cultural and craft facilities and services at the different tourist attraction points

Table: 10 Performance against targets under Infrastructure Development

#	Output/ Actions	Indicators	NDP III Target FY2022/23	Actual performance FY2022/23	Rating	Lead MDA	Remarks
Intervention 2.1: Expand, upgrade and maintain tourism national transport infrastructure and services							
1	Roads upgraded and paved	Kms paved Roads	40	57	Achieved	MoWT	
2	A bridge constructed across the Nile at Murchison Falls National Park	Level of Completion of the bridge, %	100	100	Achieved	UNRA	
3	Airstrip constructed at the periphery of Kidepo Valley National Park	Level of completion of construction of Airstrip at the periphery of Kidepo Valley National Park	60	0	Not Achieved	MoWT	
4	National tourism roads expanded, upgraded and/or maintained	Km. of identified tourism roads network paved	1,300	1,120	Not Achieved	UNRA	
5	Mt. Elgon trails improved with infrastructure and facilities	Proportion of the required Mt. Elgon tourism infrastructure developed, %	20	0	Not Achieved	MTWA	
6	Trails inside protected areas maintained	Length of trails maintained	2,200	2,481.5	Achieved	UWA	759 km of tracks, 412.5km of roads, and 1,310 km of trails maintained in Protected Areas.
7	Marine/water routes developed/ upgraded including 20 docking piers and access roads on Lake Victoria constructed/ rehabilitated	Number of Piers/ docking facilities (including the access roads) constructed/ rehabilitated at selected islands (Bugala, Ngamba, Dolwe, Buvuma etc) and identified areas such as Port Bell, Jinja, Mukono (Bule), Munyonyo, Entebbe (Port Alice and Nakiwogo), Ggaba, Butebo, Lutoboka and Lambu, etc	4	0	Not Achieved	MoWT	Source of the Nile modern pier is under construction.
8		Number of Cruise Ships and Water Buses provided	5	5	Achieved	MTWA	The private sector has invested on Kazinga Channel, L. Victoria.

9	Roads leading to cultural heritage sites of Bigo Byamugenyi archaeological heritage, Nyero, Patiko, Emin Pasha's fort improved	Km of road upgraded-Bigo Byamugenyi (15kms)	-		No assessment	UNRA	Target is on the later years of the NDP III period.
10		Km of road upgraded-Nyero (10kms)	-		No assessment	UNRA	Target is on the later years of the NDP III period.
11		Km of road upgraded-Patiko (37kms)	-		No assessment	UNRA	Target is on the later years of the NDP III period.
12		Km of road upgraded- Emin Pasha's fort (40kms)	-		No assessment	UNRA	Target is on the later years of the NDP III period.
13		Km of road upgraded-Barlonyo (12kms)	-		No assessment	UNRA	Target is on the later years of the NDP III period.
Intervention 2.2: Support the development and/or upgrade of accommodation and conference facilities of all types and sizes as well as leisure attractions and facilities (including, restaurants, bars and cafes)							
14	Room Stock increased	No hotel rooms available	7,000	350,550	Achieved	MTWA	
15	International hotel chains established	No. of international hotel chains established	7	5	Not achieved	UTB	
16	National convention center established	Level of development of the National convention Center	70	10	Not Achieved	MTWA	Land secured and titled in Entebbe.
Intervention 2.3: Support the private sector to provide low-cost accommodation facilities in protected areas							
17	Accommodation and catering services developed and/or upgraded in protected areas	No of tourist accommodation rooms in protected areas	1,129	981	Not Achieved	UWA	
Intervention 2.4: Develop digital capability in the tourism industry to market and improve access to products							
18	Access to fast accessible and reliable internet connectivity in PAs	Number of Wildlife Protected areas with fast accessible and reliable internet connectivity	6	19	Achieved	NITA-U	Still gaps in coverage. Some sports in protected areas do not have adequate coverage.
19	e-tourism services provided	Proportion of Tourism service providers (Tour operators, accommodation, recreational/ tourism site) that offer online services such as bookings	50	61	Achieved	UTB	
20		No. of tourism circuits connected to internet	2	2	Achieved	UTB	
21		Permitting processes automated and permit management systems developed	1	1	Achieved	MTWA	The CITES permitting system was developed and is under use.
Intervention 2.5: Construct water dams in Toro Semuliki Wildlife Reserve, Lake Mburo National park, Kidepo Valley National Park, Murchison Falls National Park, Pian Upe Wildlife Reserve and Bokora-Matheniko Wildlife Reserve savannah wildlife protected areas							
22	Water dams established in selected savannah wildlife protected areas	Number of water dams constructed in Protected Areas	2	2	Achieved	UWA,MoWE	
Intervention 2.6: Establish trade and service facilities, including; insurance, banking, sports and recreation, cultural and craft facilities and services at the different tourist attraction points							
23	Trade and service facilities established	No. of tourist stop-overs developed.	-		No assessment	MTWA	
24		No. souvenir and craft facilities /centres established/ rehabilitated	1	1	Achieved	MTWA, MoTIC	Masindi souvenir and craft facilities /centres established.

During the financial year, the following were realised;

1. 1,218km of trails, 533km of tracks and 392.5km of roads were maintained and 5 new bridges were installed in Kyambura Gorge to ease chimp tracking within the gorge.
2. Hoima/Kabaale International Airport is about 90% complete and Entebbe International Airport expansion is at advanced stages.

Uganda Airlines has been fully operationalised.

Progress on the development of Tourism Roads

A total of 65 roads with a total length of about 4,000 kms were mapped out in 2012 as Tourism roads that need to be upgraded to improve tourist connectivity. These are national roads that connect the tourism zones including national parks and other tourist attractions.

Visible progress has been made with the construction of over 18 roads already completed with total length of 1,507 kms. The other roads are at various stages of development- civil works are ongoing on 19 roads (about 948kms), while 9 Roads (about 594kms) have civil works planned for the FY 2023/24 and 2024/25. A total of 310kms covering 6 Roads are planned for civil works after the NDP 3 period.

In order to fast-track their development, Government has committed to working on at least 150kms of tourism roads annually over the remaining three years of NDP III. Owing to the slow rate of development of these roads mainly due to limited resources, other modes of financing such as contractor facilitated financing are being explored by Government.

Table: 11 Already paved and Completed Civil Works

No	Road Link	Kms
1	Kamwenge – Fort Portal	65
2	Fort Portal - Bundibugyo - DRC Border (Lamia)	90
3	Nakapiripirit - Moroto	95
4	Gulu – Kitgum – Palongo – Lututur(Gulu - Acholibur Section)	170
5	Nebbi – Ajai (Gulu - Arua highway)	50
6	Kapchorwa – Okolim – Nakapiripirit (Kapchorwa to Muyembe section)	80
7	Soroti - Moroto	170
8	Jinja – Kayunga along River Nile	45
9	Kabwoya- Bulima /Hoima	66
10	Kabwoya – Bulima/Hoima	66
11	Hoima – Masindi (Hoima – Bulima – Masindi Route)	52
12	Kyenjojo – Kabwoya	144
13	Mpigi – Kibibi – Mityana (Mpigi – Kibibi - Kanoni section)	120
14	Kyenjojo – Kabwoya	144
15	Paliisa- Mukongoro Rock Paintings	30
16	Masaka-Bukakata	45
17	Paliisa- Mukongoro Rock Paintings	30
18	Masaka-Bukakata	45

Table: 12 Civil works are already ongoing, feasibility studies and detailed designs have been completed.

No	Road Link	Kms
1	Masindi-Para	92
2	Pakwach-Para	45
3	Hoima – Biiso Masindi -Wanseko	108
4	Buliisa-Para	30
5	Namugongo Ring Road	52
6	Access to the fishing villages: Kasenyi (12km), Hamukungu(17km) Kahendero(20km)	49
7	Jinja – Bujagali -Itanda falls	40
8	Kyenjojo – Kigarale – Kahunge –Rwamwanja – Kihura	24
9	Bisozi – Bihanga – Buremba – Kazo	36
10	Luku – Kalangala – Lutoboka	36
11	Hamukungu(17km) Kahendero(20km)	37
12	Access Road to Mweya and Katwe	60
13	Biiso-Masindi section	

No	Road Link	Kms
14	Masindi-Biiso-Butiaba Port	68
15	Rukungiri-Kihihi	48.3
16	Kihihi – Kanyantoro section lies along Kanungu – Kihihi 9.2 kms and Kihihi-Ishasha 11kms	20.2
17	Ishasha – Katunguru	66
18	Kanungu – Hamurwa	92
19	Soroti – Amuria – Obalanga – Achan Pii	45

Table: 13 Civil works to start in the remaining NDP III period FYs 2023/24 or 2024/25

No	District	Kms
1	Mbale-Buduuda Elgon park boundary -Lwakhakha	60
2	Mbale – Buduuda – Elgon Park Boundary – Lwakhakha	60
3	Kotido – Kaabong	68
4	Kabale – Lake Bunyonyi	12
5	Buwaya – Kasanje – Mpigi	52
6	Kasanje – Sisa – Kisubi	23
7	Kisoro - Mgahinga NP Headquarters	18.3
8	Karenga-Kapedo-Kaabong-	66
9	Lira – Abim – Kotido	52
10	Tororo – Buduuda – Elgon-park boundary	23
11	Karugutu – Ntoroko	12
12	Sironko – Budadiri – Bunasifa	60
13	Kisoro – Nkuringo – Rubuguri – Muko	65
14	Kitgum-Orom-Karenga	116
15	Gayaza (Ziobwe) – Wobulenzi	24
16	Kihihi - Butogota – Buhoma (Kanyantoro – Butogota (16.5km) and Butogota – Buhoma (15km) sections are part of Buleme – Buhoma – Butogota - Hamayanja – Ifasha – Ikumba road)	31.5
17	Kapchorwa – Okolim – Nakapiripirit (Muyembe – Nakapiripirit section)	80
18	Arua – Yumbe – Moyo – Dufile	54
19	Kamwenge – Dura – Hima	48.3
20	Mpigi – Kibibi – Mityana	120
21	Kotido-Moroto	120
22	Karenga-Apoka/Sudan border	40
23	Kasese – Nyakalengija	108

Table: 14 Awaiting resources and scheduled to start after NDP III

No	District	Kms
1	Kabale - Ruhija – Buhoma	144
2	Pakwach – Wankadu – Panyimur	30
3	Nebbi – Ajai (Okollo – Inde road	29
4	Rukungiri – Kigezi WR – L. Edward Fishing Village	30
5	Pakwach – Ajai- Ocoko	9.2
6	Kyegegwa – Katonga	68

6.2.3. Sub-programme 2: Infrastructure, Product Development and Conservation

Programme Objective: Develop, Conserve and diversify product range

Interventions

- 3.1 Develop new tourist attraction sites profiled by region to include new products such as: Community tourism; Adventure tourism further enhanced by developing hiking, climbing and cable cars in the Rwenzori Mountains; Water-based (marine) tourism; e.g. from Semuiki National Park to East Madi wildlife reserve through Lake Albert, Semuliki river and River Nile; MICE; Agro-tourism
- 3.2 Upgrade, maintain and redevelop existing tourist attraction sites profiled by region to include new products like dark tourism, culinary tourism, adventure tourism, wellness 'tourism, war tourism
- 3.3 Diversify tourism products eg cultural and map potential across the country including conducting hazard risk and vulnerability mapping for tourism areas
- 3.4 Establish and enforce quality marks/ standards for the tourism industry and its sub-segments through regular inspection and grading of tourism-related facilities such as accommodation, attractions, beaches, restaurants and travel as well as enforce service standards for tour operators
- 3.5 Develop competitive tour packages (including transportation, lodging, and excursions)
- 3.6 Provide security at tourist attraction sites including addressing human-wildlife conflicts
- 3.7 Develop and implement a framework for conserving natural and cultural heritage
- 3.8 Strengthen enforcement against tourism crime
- 3.9 Remove evasive species in protected areas

Table: 15 Performance against targets under Product Development and Conservation

#	Output/ Actions	Indicators	NDP III Target FY2022/23	Actual performance FY2022/23	Rating	Lead MDA	Remarks
Intervention 3.1: Develop new tourist attraction sites profiled by region to include new products such as: Community tourism; Adventure tourism further enhanced by developing hiking, climbing and cable cars in the Rwenzori Mountains; Water-based (marine) tourism; e.g. from Semuiki National Park to East Madi wildlife reserve through Lake Albert, Semuliki river and River Nile; MICE; Agro-tourism							
1	Tourist attractions developed, upgraded and/or maintained (Source of the Nile, Kagulu Hill and Namugongo)	Number of Tourism Products upgraded/ developed(cumulative)	8	6	Not achieved	MTWA	Products developed or under development include Kagulu Hills, Source of the Nile, Mountaineering on Rwenzori, Kikorongo equator, Mugaba Palace, Nyeru rock art site.
Intervention 3.2: Upgrade, maintain and redevelop existing tourist attraction sites profiled by region to include new products like dark tourism, culinary tourism, adventure tourism, wellness 'tourism, war tourism							
2	Tourist attractions developed, upgraded and/or maintained	Source of the Nile & Namugongo developed into major domestic tourism centres	-	-	No assessment	MTWA	Contractor procured for the Source of the Nile modern pier. NDP III target put on the next FY.
Intervention 3.3: Diversify tourism products eg cultural and map potential across the country including conducting hazard risk and vulnerability mapping for tourism areas							
3	Tourism products profiled by region to include new products like:- dark tourism, culinary tourism, adventure tourism, wellness tourism, war tourism	No. of regional tourism product portfolios developed	2	3	Achieved	MTWA	Studies conducted and profiles developed for the Greater Kampala Metropolitan Area Tourism Circuit (led by NPA), Culinary tourism, and the Albertine Graben Integrated Destination Development Plan (IDDP).
Intervention 3.4: Establish and enforce quality marks/ standards for the tourism industry and its sub-segments through regular inspection and grading of tourism-related facilities such as accommodation, attractions, beaches, restaurants and travel as well as enforce service standards for tour operators							

4	Quality marks/ standards enforced through regular inspecting, grading of tourism-related facilities such as accommodation, attractions, beaches, restaurants and travel	Number of Tourism enterprises inspected, graded and classified	4,500	495	Not Achieved	UTB	149 facilities inspected.
5		No. of star-rated hotels, lodges, apartments, hostels, camping sites, etc	190	0	Not Achieved	UTB	Inventory exercise concluded and the facilities that qualify for star-rating identified.
6		Level of facilities/ operators complying to standards, %	45	55	Achieved	UTB	
Intervention 3.5: Develop competitive tour packages (including transportation, lodging, and excursions)							
7	A competitive tour package	Number of Tour packages developed	6		No assessment	AUTO	
8		Visitor Satisfaction, %	76	79	Achieved	MTWA	Details in TEMS survey reports, 2022/23.
9		% of package tourists to total tourist arrivals	11.8	3.0	Not Achieved	UTB	Details in TEMS survey reports, 2022/23.
Intervention 3.6: Provide security at tourist attraction sites including addressing human-wildlife conflicts							
10	Tourism police strengthened	Tourism police units recruited, trained and equipped	Yes	Yes	Achieved	UPF	11 senior tourism police officers trained on the existing tourism regulatory framework
11		Joint Tourism Security Committee strengthened	1	1	Achieved	UWA	
12	Adequate accommodation for Tourism security personnel provided	Proportion of tourism sites/facilities with appropriate safety and rescue facilities, %	13	30	Achieved	UPDF	
13	Human-wildlife conflicts managed	No. of new ranger outposts established in protected areas	5		Not Achieved	UWA	
14		Kms of protected areas fenced off	260	106.7	Not Achieved	UWA	A total of 106.7km of the electric fence in Queen Elizabeth NP -57 km and Murchison Falls NP.
Intervention 3.7: Develop and implement a framework for conserving natural and cultural heritage							
15	Uganda National museum upgraded	Uganda National museum upgraded	20%	22%	Achieved	MTWA	National museum Exhibits curated and maintained and an additional temporary exhibition mounted. Designs and BoQs prepared and approved for the expansion.
16	Regional museums established/ developed at Jinja, Soroti, Moroto, Arua, Fort portal and Gulu	No of Regional museums established/ developed	1	1	Achieved	MTWA	Soroti regional museum floor renovated and water born toilets constructed; Designs and BoQs for the proposed modern Moroto Museum developed and approved.
17		No of tourists visiting Museums and cultural heritage sites	110,000	147,799	Achieved	MTWA	School groups make up the largest percentage on visitors to the museum and schools were closed for most of 2021.
18	New National and regional Theatres established	New National and regional Theatres in place		0	No assessment	MTWA	

19	Key Wildlife Reserves and Natural Central Forest Reserves upgraded to National Park status	No of Key Wildlife Reserves and Natural Central Forest Reserves upgraded to National Park status	3	0	Not Achieved	UWA	The Statutory Instruments/ regulations for all Protected Areas earmarked for upgrade were developed and submitted for approval. Consultations and district resolutions secured for the upgrade of Katonga WR, Toro-Semliki WR, Echuya CFR, Kagombe CFR, Bukaleba CFR, Sangobay CFRs and wetlands, Kasato CFR, Rwengeye CFR, Kyamurangi CFR.
Intervention 3.8: Strengthen enforcement against tourism crime							
20	Reduced tourism crime	No. of security incidents at various tourist attraction sites	3,455	No data	No assessment	MTWA	
Intervention 3.9: Remove evasive species in protected areas							
21	Spread of evasive species controlled	Proportion of Protected Areas encroached by invasive species, %	27	28	Not achieved	UWA	A total of 3067ha of invasive and exotic species cleared in Wildlife Protected Areas.

During the financial year, the following were realised;

1. All Uganda's 10 national parks and 12 wildlife reserves protected and guidance provided for the management of 5 community wildlife areas and 13 wildlife sanctuaries. These include Murchison Falls, Queen Elizabeth, Lake Mburo, Wildlife, Pian Upe, Bugungu, Karuma, East Madi, Kyambura, Kigezi, Katonga, Bwindi Impenetrable NP, Mgahinga Gorilla NP, Kidepo Valley NP and Mount Elgon NP, Matheniko WR, and Bokora WR and Karenga CWA. Standards and guidelines developed for implementation of Wildlife Act.
2. All Wildlife Use right holders in 35 districts inspected to ensure compliance with CITES and wildlife utilisation. These are; North-Eastern (Kween, Amudat, Nabilatuk, Nakapiripirit, Napak, Kaabong and Karenga) Western (Mubende, Kyenjojo, Hoima, Nakasongola, Nakaseke, Butambala, Luwero, Mpigi, Mukono, Kikuube and Buliisa), Kyankwanzi, Kiboga, Mpigi, Butambala, Wakiso, Mukono and Luwero, Kyotera, Kabale, Mbarara, Kanungu, Kiruhura, Kasese, Mbale, Tororo, Kamuli Buikwe; Nakasongola, Nakaseke, Butambala, Luwero, Mpigi, and Mukono.



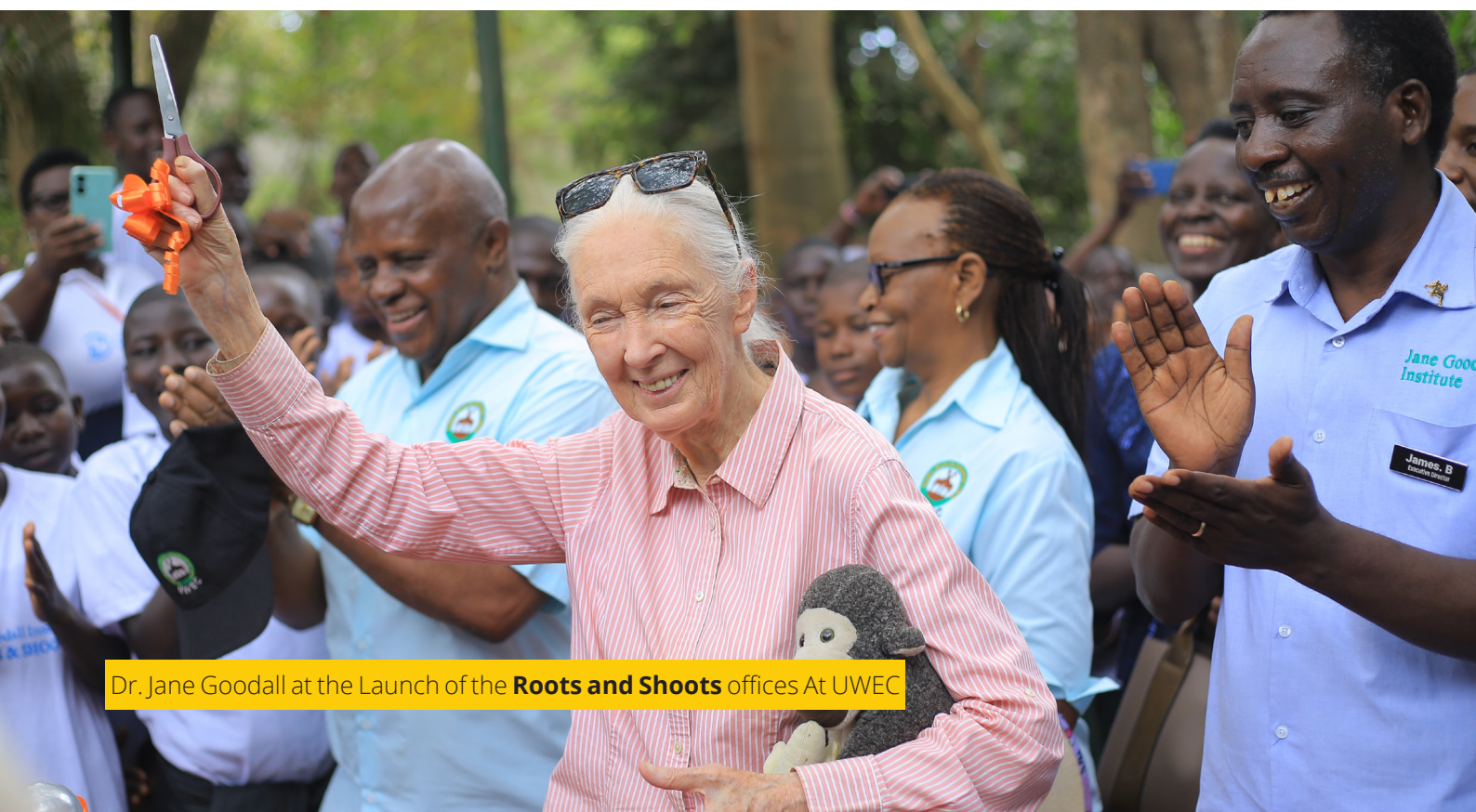
3. 102.7 km of electric fence maintained in Protected Areas; 04km of electric fence constructed in Wangkarwar sector and Karuma in MFPA; 4,081 metres of stonewall were maintained in MGNP
4. Invasive species management continued in PAs with 3,067 hectares of invasive species cleared.

5. A total of 409.3km (against annual target of 416kms) of PA boundary maintained. Boundary management continued with 15km of the PAs boundary planted with live markers.
6. Law enforcement operations across the country to combat wildlife crime continued smoothly with 18,823 patrols conducted across the country, resulting into the arrest of 2,145 suspects and the recovery of 30578 assorted poaching and trafficking implements and 10190 assorted wildlife and wildlife products
7. 22.9km of the elephant trench was excavated in QENP-04km, KNP-14.9km and MFNP-19.4 km; 8km of trenches maintained in QENP (6km) and KNP (2km);
8. 339 scouts from MFNP, MGNP, QENP, KNP, SNP and LMNP trained and equipped with the basic knowledge in problem animal management.
9. 15 community scouts in Mgahinga (MGNP), Murchison Falls (MFNP): 03 scout groups involving 50 members refreshed on human wildlife conflict management; 15members of Diima Scout group, 15 members of Nyamahasa Scout group and 20 Members of Jumah Scout group. LMNP: 05 wildlife scouts trained in tour guiding. KVNP: A scouts' verification exercise conducted and the scout database updated. A total of 21 groups composed of 385 scouts registered and inducted on the scout guidelines
10. A total of 850 Rangers (against a target of 800) recruited and trained.
11. A total of 713 ha (against annual target of 250 ha) of the degraded area in Kibaale, Mt. Elgon and Rwenzori mountains restored.
12. 480.6km of fire lines were maintained in MENP-37.9km, QENP-41km, RMNP-18.8km, KTWR-16km, TSWR-20km, MGNP-54km, PUWR-84km and KVNP-62.7km, MFNP-142.2km, KNP-4km



13. 200 Uganda kobs were translocated from Kabwoya WR to KVNP
14. Veterinary diagnostic laboratory at Queen Elizabeth Conservation Area operationalized and samples processed. 06 routine disease surveillances conducted tin issues of anthrax, rhino reintroduction, Marburg, other bat borne pathogens, chimpanzees in Kibaale NP that presented lesions on the mouth/face, loss of hair (alopecia), weight loss and poor appetite among the Kanyanchu group.
15. Aerial survey conducted in TSWR and ground animal censuses undertaken in Bugungu, Katonga Wildlife reserves and Nakaseke; Crocodile nest assessment undertaken in MFNP; Key wildlife species were monitored in all PAs using various monitoring systems including earth ranger, SMART, ODK and RBDC. Increased sighting of animals was noted; Monitored 26 gorilla families in BMCA, 02 golden monkey groups in MGNP and 04 families of Chimpanzees in KNP and Kyambura WR. The primates were reported healthy; The population of giraffe in LMNP has grown to 51 and 38 in PUWR; Ground animal survey undertaken in Nakaseke Concession Area

- 16.
17. The Revenue sharing funds worth Ushs 3,955,722,602 disbursed to communities neighbouring protected areas of Queen, Kibaale and Kidepo Valley National Parks.
18. 730 awareness meetings, 144 outreaches and 66 radio talk shows were held by PAs targeting neighboring communities and 180 schools and 20 community groups were received in the PAs for conservation education. A total of 18,485 benefited from conservation education program.
19. 2,481.5 kms of trails inside protected areas maintained (759 km of tracks, 412.5km of roads, and 1,310 km of trails maintained in Protected Areas.)
20. 1,310 km of trails, 759 km of tracks and 412.5km of roads were maintained. Rehabilitation of infrastructure in Kyambura gorge was completed; 12 Campsites, all guest houses, Visitor Information Offices and Offices and other facilities were maintained to improve on visitor satisfaction; Construction of 04 water borne toilets in QENP, MFNP, KVNP and MENP completed; 1262m of boardwalks were maintained in SNP (850m) and KNP (412m).
21. Rwenzori Elena Camp developed with facilities (rescue and first aid block; dining structure, 40 pax tourist accommodation and 60pax guides/porters accommodation, kitchen) and progress at 35%. Once completed, the facilities will contribute to tourist safety and satisfaction.
22. Fully-fledged customer service centres operational at UWA HQs, Sheraton and in QENP, RMNP, MFNP, KNP and BINP; The UWA H/Q customer service centre improved with installation and operationalization of a queuing machine. This has helped to reduce on customer complaint and waiting time, keeping the queues organized and improved reservations staff efficiency.



Dr. Jane Goodall at the Launch of the **Roots and Shoots** offices At UWEC

CULTURAL HERITAGE CONSERVATION

1. A total of 16 sites and Museums and artifacts preserved including Kabale, Wedelai, Partiko, Nyero, Kafir, Mukongoro, Moroto, Dolwe, Barlonyo, Kakoro, Mugaba, Fort Thurston, Bigo Byamugenyi and Komuge. The sites and museums were open to domestic and foreign visitors.
2. Uganda's Napak cultural heritage site successfully presented to UNESCO and listed as one of the 100 Geo Parks in the World. This is a key milestone and the site's listing will increase tourism and conservation. This achievement was effectively secured during the International Union of Geo Sites (IUGS) conference in Zumaia-Bilbao- Spain.
3. UNESCO Mission from Paris hosted in Uganda on the assessment of restoration of the Kasubi Tombs to

expedite the enlistment of Tombs of Buganda Kings at Kasubi. Uganda represented at the 47th UNESCO World Heritage committee and UNESCO General Assembly

4. The Museums and Monuments Bill approved by Parliament. It enhances the utilization, protection and promotion of cultural heritage resources as well as the participation by the host communities in conservation and tourism to benefit from these assets.
5. Uganda National, Kabale and Soroti Museums maintained; Security at the National Museum and Bigo byamugenyi managed. 100% of the exhibits at the Uganda National and Soroti Museums curated and artifacts preserved. The National Museum Modern Transport gallery opened to the public.
6. National History Exhibition Uganda @60 produced and opened by H.E the President of Uganda on 5th October 2022 at Uganda Museum. More than 10, 000 visitors toured the exhibition. An iconic artifact of one mountain gorilla (Ndahura silverback) designed, constructed and mounted at the National Museum. The visitation to Museums and sites increased by 119% from 67,366 in FY 2021/22 to 147,799 tourists in FY 2022/23.
7. Ten (10) cultural heritage conservation education outreaches conducted covering 33 schools in the central region, Northern and 30 teachers in Kabale district (19 male and 11 female) as well as Entebbe. More than 10,000 Ugandans sensitized on Museums and Heritage.
8. Mugaba Palace renovations completed (paving, landscaping, and filling of the amphitheater space, construction of short walls, cutting of roads, installation of three power-phased lines, and construction of sculptures). The Mugaba cultural heritage site will be open for domestic and international tourists. The host communities will benefit through education (history), sale of their handicraft and souvenirs as well as direct employment.
9. 10 sites in Northern Uganda and 20 in Bunyoro sub region surveyed for titling

UWEC:

1. A total of 503 individual animals (63 species) maintained, fed and veterinary care provided at UWEC in Entebbe.; 3 new animal species acquired through community rescues (Giant eagle owl, Debrazer monkey and a reed buck); Responded to 100% rescue calls (60 animals) in and around Entebbe. 21 animals rehabilitated at UWEC; Health checks conducted, deworming done for 4 chimpanzees, 10 lions, 2 Cheetahs, 2 Hyenas and 1 Giant Eagle Owl has been done; A total of 710 pets vaccinated during the veterinary camp.
2. A total of 4,336 institutions of learning engaged in general guided tours and 38 interns enrolled at UWEC and trained in conservation education Thematic guided tours have been implemented for secondary schools engaging 65 scouts, 26 secondary schools (3,832). Wildlife heritage conservation education conducted covering 32 schools and 18,182 learners through; 6 community outreaches in Mbarara and Makanaga Wetland Ecotourism site, a teachers' workshop, a Conservation Education booklet (Volume One) which was produced and 255 copies distributed.

6.2.4. Sub-programme 3: Regulation and Skills Development

Programme Objective: Develop a pool of skilled personnel along the tourism value chain and ensure decent working conditions

Interventions

- 4.1 Implement the tourism curriculum at the Uganda Hotel and Tourism Training Institute (HTTI).
- 4.2 Provide tailor-made training for actors across the entire tourism value chain
 - Develop the Jinja and Kasese institutes to international standards
 - Provide a financing framework for this training
- 4.3 Incentivize the private sector to provide skills through internship and apprenticeship programs
- 4.4 Nurture local hospitality sector enterprises for participation in local, regional and global tourism value chains
- 4.5 Establish and operationalize a tourism investment fund to enable private investors get access to affordable finance.
- 4.6 Strengthen/ develop the legal and policy framework and mechanisms to ensure decent working conditions in the industry so as to reduce incidences of exploitation

Table: 16 Performance against targets under Skills Development

#	Output/ Actions	Indicators	NDP III Target FY2022/23	Actual performance FY2022/23	Rating	Lead MDA	Remarks
Intervention 4.1: Implement the tourism curriculum at the Uganda Hotel and Tourism Training Institute (HTTI).							
1	HTTI curriculum revised and implemented	Reviewed HTTI curriculum operationalized	Yes	Yes	Achieved	MTWA	The UHTTI Curriculum is operational and being implemented
Intervention 4.2: Provide tailor-made training for actors across the entire tourism value chain							
2	UHTTI infrastructure developed (training application hotel, class rooms, labs, admin block)	Level of development of UHTTI infrastructure (training application hotel, class rooms, labs, admin block), %	100	45	Not Achieved	MTWA	An 80-room hotel constructed. Class rooms, labs, admin block yet to be constructed.
3	Students enrolled at Uganda Hotel and Tourism Training Institute (UHTTI)-Jinja	No of students enrolled Uganda Hotel and Tourism Training Institute (UHTTI)-Jinja	500	633	Achieved	MTWA	
4	UWRTI infrastructure developed (class rooms, labs, admin block, fence, staff housing, guest house, etc)	Level of development of UWRTI infrastructure (class rooms, labs, admin block, fence, staff housing, guest house, etc), %	100	20	Not achieved	MTWA	Infrastructural designs prepared; Funding secured; contractor procured.
5	Students enrolled at Uganda Wildlife Research Training Institute (UWRTI)	No of students enrolled at Uganda Wildlife Research Training Institute (UWRTI)	300	248	Not achieved	MTWA	248 students enrolled, maintained, trained and examined in different programs.
Intervention 4.3: Incentivize the private sector to provide skills through internship and apprenticeship programs							
6	Incentives provided	Number of incentives provided to the private sector	1	1	Achieved	MTWA	Waiver on Value Added Tax (VAT) during COVID-19 to aid recovery. Tourism credit created (UDB & EU) to extend soft loans to aid recovery and offer short term debt reliefs.
7	Partnerships with private sector created for apprenticeship projects	No. of private sector companies partnered with	6	0	Not achieved	MTWA	The program has not yet started
Intervention 4.4: Nurture local hospitality sector enterprises for participation in local, regional and global tourism value chains							
8	Capacity built for local hospitality sector enterprises for increased participation in local, regional and global tourism value chains	Number of trainings conducted to nurture local hospitality sector enterprises	6	4	Not achieved	UTB	
9	Tourism Business Development Services strengthened through best practice training and benchmarking	Proportion of hospitality enterprises complying to international standards	48	55	Achieved	Enterprise Uganda	
Intervention 4.5: Establish and operationalize a tourism investment fund to enable private investors get access to affordable finance.							
10	A tourism investment fund established and operationalized by BOU	Tourism Investment Fund in Place	Yes	No	Not achieved	MTWA	
Intervention 4.6: Strengthen/ develop the legal and policy framework and mechanisms to ensure decent working conditions in the industry so as to reduce incidences of exploitation							

11	Policies, Standards and regulations developed for the Management and Utilization of Natural and Cultural Heritage Resources.	No of regulations and standards developed to operationalize the Uganda Wildlife Act 2019	2	6	Achieved	MTWA	-Community Wildlife Committee; Community Wildlife Management Area; Wildlife Sanctuary Regulations, revenue sharing; compensation; Concessions Regulations developed.
12		No of regulations and standards developed to operationalize Museums and Monuments Bill once enacted.	1	1	Achieved	MTWA	National Museums and Monuments Act, 2023 approved by Parliament and assented to by H.E the President. The Museums and Monuments guidelines drafted and reviewed by the Parliamentary counsel.

During the financial year, the following were realised;

1. Maintenance, Training (theory, practicals, and field tours), field attachment and assessment (examinations, coursework) conducted for all the 633 UHTTI students in year 2022/23. A total of 603 UHTTI students placed on Internship as part of practical learning and assessment. 250 new students enrolled at UHTTI.
2. An 80-room new application hotel constructed at UHTTI; Institute infrastructure and equipment maintained.
3. UWRTI: A total of 248 students enrolled at UWRTI including (160 new); 115 students deployed and supervised for internship in different wildlife-based organisations. Designed 2 research projects on the invasive species and one on Environmental, Education, negotiated access Alternative Livelihoods and Decentralized co-management (ENAD). The main administration building and the multi-purpose hall renovated.
4. 180 tourist guides trained in sector guides regulations in partnership with Uganda Wildlife Authority and Tour Guides Forum Uganda
5. Assessed 260 Level 1 tourist guides and 186 tourist guides for worker's pass in partnership with Directorate of Industrial Training
6. Trained 75 tour and travel operators in tourism national standards and regulations, product promotion, customer handling, itinerary design and digital marketing in partnership with the Association of Uganda Tour operators (AUTO)
7. Trained 58 travel agents in the tourism regulatory framework, operationalization of the Global Distribution Systems (Amadeus) and digital marketing in collaboration with Uganda Travel Agents Association
8. 704 Security officials, Tourism Police and Criminal Department Officers trained in enforcement of Tourism regulations in Kabarole. Kasese, Mbarara, Kabale, Kampala, Masaka, Hoima, Gulu, Arua, Lira, Jinja, Mbale and Masindi.
9. Trained 222 hotel owners in the tourism regulatory framework, use of the Electronic Fiscal Receipting and Invoicing Solution (EFRIS), customer handling and digital marketing in partnership with Uganda Hotel Owners Association (UHOA) in the districts of Kampala, Jinja, Kalangala and Mbarara.
10. Trained 555 tourism service providers in the tourism regulatory framework, operationalization of the Global Distribution Systems (Amadeus) and Electronic Fiscal Receipting and Invoicing Solution (EFRIS), customer handling, product promotion, itinerary design and digital marketing in Kampala, Jinja, Kalangala and Mbarara

6.2.5. Sub-programme 3: Regulation and Skills Development

Programme Objective: Enhance regulation, coordination and management of the tourism

Interventions

- 5.1 Develop a Tourism Information Management System
- 5.2 Establish quality marks/ standards for grading of tourism-related facilities such as accommodation, attractions, beaches, restaurants and travel
- 5.3 Strengthen inspection and enforcement of service standards for tourism facilities and tour operators

5.4 Strengthen institutional partnerships for tourism development**Table: 17 Performance against targets under Regulation**

#	Output/ Actions	Indicators	NDP III Target FY2022/23	Actual performance FY2022/23	Rating	Lead MDA	Remarks
5.1 Develop a Tourism Information Management System							
1	An online portal developed for the Tourism information Management System	Level of completion of the online Tourism information Management System (TIMS)	30	50	Achieved	MTWA	System Development and Integration stage completed; the operational Acceptance Testing underway.
5.2 Establish quality marks/ standards for grading of tourism-related facilities such as accommodation, attractions, beaches, restaurants and travel							
2	Quality marks/ standards for grading of tourism-related facilities	No. of quality marks/ standards for grading of tourism-related facilities developed	1	1	Achieved	MTWA, UTB	Domesticated the new classification & grading criteria for tourism facilities.
5.3 Strengthen inspection and enforcement of service standards for tourism facilities and tour operators							
3	Capacity building conducted for the actors in quality assurance of Tourism service standards.	No. of tour and travel agents registered and trained.	500	356	Not achieved	UTB	Tour and travel companies registered and inspected for compliance to minimum service standards and Uganda's tourism product offering
4		No. of Tour guides registered, trained, assessed and licensed (5-10% growth rate)	600	1,278	Achieved	UTB	Assessment supported by certified tourist guides from the Directorate of Industrial Training (DIT) Developed an e-self registration system for improved remote access.
5		No. of accommodation and restaurant facilities registered, inspected	3,600	495	Not achieved	UTB	
5.4 Strengthen institutional partnerships for tourism development							
6	A framework developed to strengthen public/private sector partnerships.	A framework developed to strengthen public/ private sector partnerships.	Yes	Yes	Achieved	UTB	
7	Framework for the Tourism levy reviewed and operationalized	Tourism fund established from collection of the levy			No assessment	MTWA	No NDP III target for the FY 2022/23

During the financial year, the following were realised;

1. National Museums and Monuments Act, 2023 approved by Parliament and assented to by H.E the President. Sensitizations and dialogues undertaken on the provisions of the Museums and Monuments Act 2022 to increase awareness on the need to protect and conserve museums and monuments.
2. Community Wildlife Management Area and Wildlife Sanctuary Regulations developed. These facilitate the participation of communities in conservation and promotion of sustainable use of wildlife resources.
3. Tour and Travel Operators: Registered 157, inspected 165 and licensed 108
4. Tour Guides: Registered 314, assessed 899 tourist guides in preparation for licensing and licensed 65
5. Accommodation Facilities: Registered 59, inspected 43 and licensed 47.
6. Inventoried 64 accommodation facilities to determine readiness for grading and classification in Kampala, Wakiso, Masaka, Jinja, Mbarara and Mbale; Qualified 54 facilities for classification
7. Completed the E-Grading and Classification System and participated in the review of the EAC Classification Criteria with the EAC Secretariat
8. Trained assessors in operation of the E-Grading and Classification system.
9. The Statutory Instruments/ regulations for all Protected Areas earmarked for upgrade were developed and submitted for approval.
10. 4 Development project Proposals developed and submitted to the Development Committee of MoFPED

including Mt. Elgon Tourism Infrastructure Development Project at Prefeasibility, Development of water based Eco-adventure tourism parks at Feasibility stage, UWEC infrastructure Development project at profile stage and Mitigating Human Wildlife Conflicts at feasibility stage and code assigned.

11. Tourism performance data collected and statistics compiled and disseminated; Policy analysis, research and planning; Tourist Expenditure and Motivation survey Report Produced; Immigration data capture decentralised; Tourism Satellite Account (TSA launched).
12. Political leadership and oversight provided and the Programme Working Group operationalized. All the 3,640 staff under Vote 022 MDAs (MTWA, UWA, UWEC, UHTTI and UWRTI) were supported, supervised, maintained and wage paid.



The State minister of Tourism and Kyabazinga of Busoga at the Peak of Kaguru Rock

6.3. PERFORMANCE OF PROJECTS UNDER THE TOURISM DEVELOPMENT PROGRAMME

6.3.1. GOVERNMENT OF UGANDA FUNDED PROJECTS

The Tourism Development Programme is currently implementing 3 Government Funded development projects in the PIP;

Table: 18 Projects under Public investment Plan

S/No	PROJECT TITLE	TOTAL PROJECT COST	CUMULATIVE PERFORMANCE AS AT END OF 2022/23
1	Development of Museums and Heritage Sites for Cultural Tourism Phase Two (01/07/2021 to 30/06/2026)	44.32 billion	1) Mugaba Palace renovations and landscaping completed 2) Nyero Interpretation Center completed 3) Designs and BOQs for Moroto Museum completed. 4) Procurement of a contractor to construct the Moroto Museum in progress 5) Soroti Museum refurbished, Toilets constructed, and restocking in progress 6) Kikorongo Equator Monument construction is underway. 7) Signages for six heritage sites designed, fabricated, and installed 8) Development of Designs and BOQs of Mwanga and Kabalega underway (to begin construction this FY) 9) Development of Designs and BOQs Napak Open-air Museum (to begin construction this FY)
2	Development of Source of the Nile Project (Phase II) (01/07/2021 to 30/06/2026)	90.55 billion	Source of the Nile 1) Resettlement Action Plan (RAP) study is on-going and mapping exercise has been concluded in Jinja and Buikwe. 2) Seven acres of land secured at the source of the Nile core area for the construction of major infrastructure to include a modern pier 3) A Contractor for the construction of a modern pier at the source of the Nile has been procured and deployed 4) TORs for design and build of the Nile observation tower have been developed 5) 50 solar lights have been installed. Other 50 planned to be installed on the completion of major infrastructure 6) 200 heavy duty life-jackets distributed. More 300 to be procured Kagulu Hills 1) Construction of concrete steps is complete 2) Installation of 50mm GL Pipe along the concrete steps completed. 3) Installation of Chain link along the steps done 4) Starting platform has been constructed. Rails have also been installed 5) Construction of two viewpoints 6) Installation of four directional and one informative signage done Bishop Hannington site 1) Six stance washroom constructed at Bishop Hannington
3	Mt. Rwenzori Tourism Infrastructure Development Project (01/07/2021 to 30/06/2026)	70.59 billion	1) A board walk with length of 100 meters established at Kicuucu point along the Rwenzori central circuit. 2) Nyabitaba Camp improved along the Central Circuit with cold proof accommodation for 40 pax tourists including dinning and kitchen facilities. 3) Elena Camp is 35% complete with cold proof accommodation for 40 pax tourists, 60 pax porters and rescue facilities 4) A total of 127 Rwenzori mountaineering service provides including tour operators, guides and porters trained and sensitized on the promotion of the Rwenzori tourism product, customer care, product development and personal development.

6.4. PERFORMANCE OF INTERVENTIONS UNDER OFF-BUDGET SUPPORT

6.4.1. The Handicraft and souvenir Development Project (HSDP) in Uganda

PROJECT DESCRIPTION			
IMPLEMENTING DEPARTMENT/AGENCY	Ministry of Tourism, Wildlife and Antiquities		
SOURCE OF FUNDING	Enhanced Integrated Framework (EIF)		
DATE OF SIGNATURE OF MOU	08/04/2019		
MOU EXPIRY DATE	07/04/2022		
EXTENSION	TO 28/08/2023		
PROJECT FINANCING (IN USD)	Original Financing	Additional Financing	Total Financing
	1,500,400	200,000	1,700,400

Objective of the project

The main objective of the HSDP was to support the development of the crafts sector through product development, increased production and export. The project also facilitated the creation of linkages between the producers, associations and the traders of handcrafted products and the tourism industry with a view of improving the livelihoods for some of the marginalized communities in Uganda in line with Uganda's Vision 2040.

Summary of Key Results

1. Constructed, equipped and handed over, one handicraft production center in Masindi near the Murchison Falls National Park
2. Re-tooled over 20 handicrafts producers by providing them with modern tools for their work such as hacksaws, machetes and smoothing planes, as well as machines like Swing Arm Clicking Machine, Electric Leather Skiving Machine, eyeleting machines, weaving needles, among others.
3. Supported three handicraft exporting companies in attainment of fair trade certification and another three in ISO 9001: 2015.
4. Capacity built to over 150 craft producers and associations representatives in quality management systems, use of e-commerce, leadership and governance and product design and market development under the training of trainers (ToT) practice of the project.
5. Developed Standards for assorted handicrafts/souvenirs such as Mats, Baskets, Jewellery, Ceramics/Pottery, Bark cloths products, Wood products and Cow Horn products
6. Developed the handicrafts Catalogue depicting Uganda's authentic handicrafts and souvenirs.
7. Developed and published the Uganda Export Manual for Exporters, the Uganda Souvenir Development Guide, the Code of Conduct and the Branding and Marketing Strategy for the handicraft and souvenir sector.
8. Held of 12 purposive marketing expos throughout the country in a bid to link the handicrafts sector to the tourism sector.
9. Held a Uganda Handicrafts Expo (UHE 2022) to showcase and create market for Ugandan crafts to the entire public.
10. Participated in 5 international handicrafts Exhibitions in a bid to create market access for the producer/exporters
11. In order to create awareness of the sector, a four 5 minutes Handicraft series of cluster videos in four regions of the country and a 20-minute video documentary were developed and clips disseminated on various media .
12. Produced promotional materials to create awareness of the project and the sector in general such as brochures, assorted stickers, bookmarks, flash discs, catalogues and tee-shirts with caps.
13. Undertook benchmarking trips for Exchange of Best practices to Ghana, Kenya and Laos, the results of which are being used during implementation.
14. Updated Market Opportunity Study for niche craft products and tourism activities
15. Developed a database of producer groups and exporters of handcrafted products in Uganda

6.5. COMPETITIVENESS AND ENTERPRISE DEVELOPMENT PROJECT (CEDP)

PROJECT DESCRIPTION			
IMPLEMENTING DEPARTMENT/AGENCY	Private Sector Foundation Uganda (PSFU)		
SOURCE OF FUNDING	World Bank		
DATE OF SIGNATURE OF MOU	09-May-2013		
MOU EXPIRY DATE	May 30, 2024		
DEVELOPMENT PARTNER CONTRIBUTION (UGX)	Original Financing	Additional Financing	Total Financing
TOURISM COMPONENT	25	43.10	68.1

Project Goal

The original Project Development Objective (PDO) of the parent project, CEDP (P130471) was: to improve the competitiveness of enterprises in Uganda by providing support for (i) the implementation of business environment reforms, including the land administration reform, and (ii) the development of priority productive and service sectors.

Under Additional Financing (AF), the PDO was revised and became more specific and focused on outcomes directly attributable to the project and to allow for better evaluation as follows: To support measures that facilitate increased private sector investment in the tourism sector and strengthen effectiveness of the land administration system.

Summary of Key Results

1. During the period under review, the following progress has been achieved:
2. The TIMS attained the System Development and Integration stage; and development of the operational Acceptance Testing Report is in progress;
3. The concepts and requisitions for the TSA 2022 and for Procurement of hardware and software ICT equipment were finalised;
4. Reviewed and Harmonized Tourism Licensing and Taxation Framework;
5. Draft Report for the Albertine Graben;
6. Uganda's Tourism brand, and promotional materials;
7. World Tourism Day September, 2022
8. PoATE 2023
9. UTB's and Private sector participation in three International Tourism Expos (IBTM-2022, Barcelona; Meetings Africa, Jo'burg; IMEX, Frankfurt)
10. Market Destination Representation for Uganda in the Africa tourist source markets;
11. Disbursement of TEF to first lot of beneficiaries;
12. Final report on the sustainability of existing funding mechanisms;
13. UM business investment plan, and KPIs;
14. Vehicles to support project activities (8 D/cabins, 3 Vans, 2 Minibuses, 1 Stn wagon, 2 customised tourism trucks)
15. Reviewed and Approved UWRTI Curriculum;
16. Contract for Design and Supervision of Construction Works at the Uganda Museum
17. Uganda Museum Educational outreach booklets and Lerner's kits;
18. ESIA for planned infrastructure developments in UWEK;
19. UHTTI additional 30-room training hotel floor at 68% completion rate; and
20. contracts signed and under implementation (UHTTI interior designer services; UWRTI Strategic Plan, and business plan; construction Supervision of Works at UHTTI Phase 11)

6.6. ASSESSMENT OF TOURISM NRM COMMITMENTS FY 2021/22 -FY2025/2026

Tourism is an increasingly important contributor to Uganda's economy. The sector's contribution over the years particularly to the Country's GDP and Job creation has been significant. The National Resistance Movement (NRM) government has been supportive and takes cognizant of the sector's key role in realizing her aspirations, also as enshrined in the Vision 2040.

The NRM government through its Manifesto 2021-2026 pronounced 16 commitments to deliver on the advancement of tourism as key driver to achieving economic growth. Out of the 16 commitments, 14 (87.5%) are on track and are likely to be fully achieved by the end of the term. These include the support to the sector to fast-track its recovery from the impacts of COVID-19; development of infrastructure including Hoima/Kabaale International Airport and expansion of Entebbe International Airport; brand rollout in Africa and overseas; development of accommodation and conference facilities; development of an International Convention Centre in Entebbe; natural and cultural heritage conservation and upgrade of key wildlife reserves and natural central forest reserves to National Parks; establish 10 valley dams in water stressed conservation areas; electric fencing; Modernization of UWEC and the National Museum; Upgrade and transformation of UWRTI and UHTTI into centres of excellence for wildlife and tourism training and research; as well as the development and diversification of tourist attractions sites.

In contrast, little has been realized on the commitment to rehabilitate marine routes including development of 20 piers on Lake Victoria; as well as the enhancement of the capacity of labour force along the tourism value chain through undertaking on-job training for 20,000 workers as well as apprenticeship for 1,000 Ugandans.

Table: 19 General Performance against the NRM Manifesto 2021-2026 commitments

#	Manifesto Commitments	Achievement	Rating	Comments
1	Provide support to the sector to fast-track its recovery from the impacts of COVID-19 as well as adapt resilience measures for the sector's growth and Sustainability.	Undertook national-wide domestic tourism awareness drives dubbed 'Tulambule' to promote the country's tourism offering and encourage Ugandans to visit tourism sites. GOU provided funds towards wage related costs of UWA staff.	On track	The 'Tulambule' campaigns organized in different Regions have consistently attracted huge crowds of Ugandans who have expressed the desire to explore more sites.
2	Implement a national tourism marketing strategy- domestic and international- as well as building a positive and competitive image by rolling out the Pearl of Africa brand in Africa and 12 overseas markets.	The Government has focused on domestic tourism promotion to ensure sustainability of tourism business amidst declines in international tourist arrivals. Explore Uganda brand rolled out and promoted in the 6 regional and 5 international markets. As a result, Uganda gained international visibility e.g on CNN where Uganda was recognised as one of the top 23 destinations to visit in 2023 Uganda's Tourism products promoted in 9 domestic and tourism events and campaigns e.g the Elgon Campaign, Explore west campaign.	On track	

#	Manifesto Commitments	Achievement	Rating	Comments
3	Increase the stock and quality of tourism infrastructure by upgrading 1,000km of national tourism roads, development of Hoima International Airport and expansion of Entebbe International Airport as well as domestic airports such as Arua, Gulu and Kasese.	Government has provided a conducive environment for tourism to flourish. Civil works are ongoing on 19 tourism roads (about 948kms) including Masindi-Para; Pakwach-Para; Hoima – Biiso Masindi -Wanseko; Buliisa-Para; Namugongo Ring Road; Jinja – Bujagali -Itanda falls; Kyenjojo – Kigarale – Kahunge –Rwamwanja – Kihura; Bisozi – Bihanga – Buremba – Kazo; Luku – Kalangala – Lutoboka; Access Road to Mweya and Katwe; Biiso-Masindi section; Masindi-Biiso-Butiaba Port; Rukungiri-Kihihi; Kihhihi – Kanyantoro section lies along Kanungu – Kihhihi 9.2 kms and Kihhihi-Ishasha 11kms; Ishasha – Katunguru; Kanungu – Hamurwa; Soroti – Amuria – Obalanga – Achan Pii. Over the last 10 years, at least 18 tourism roads have been completed with total length of 1,507 kms. Hoima International Airport is about 90% complete and Entebbe International Airport expansion is at advanced stages. Uganda Airlines has been fully operationalised.	On track	
4	Construct and rehabilitation of marine routes including 20 piers on Lake Victoria.	No progress	No progress	
5	Enhance regulation, co-ordination and management of the tourism sector to facilitate the development of accommodation and conference facilities of all types and sizes as well as leisure attractions and facilities (including, restaurants, bars and cafes).	Issued concessions in protected areas and more areas identified and earmarked for the private sector investments in accommodation. Registered 1,509 and inspected and licensed 787 Tour and Travel Operators. Registered 279, inspected and licensed 88 Accommodation Facilities from Eastern and Western Uganda	On track	The process to complete registration, inspection and Licensing is ongoing and intends to cover all regions. Need for strengthened coordination between MTWA, NIRA and other key Stakeholders
6	Support the private sector to provide low-cost accommodation facilities in protected areas and tourism zones to increase the stock of tourist accommodation rooms by 15,000.	There are tax waivers on importation of selected hotel development inputs (furnishing and machinery) Through UDB, the tourism sector accesses credit for development. 12 concessions have been approved by the UWA Board for implementation in the PAs Another 20 sites have been identified and UWA is working with UIA to identify credible investors and shorten the procurement process Tax waiver granted on Tourist vehicles and Boats	On track	The process to identifying credible investors is ongoing. The Ministry expects the number of rooms available for accommodation to increase more than 15,000 by mid FY 2023/24.
7	Working with the private sector, support tourism enterprises to promote investment in the sector, inclusive community participation and attract five successful international brands in the tourism value chain.	Current international brands operating in the country are; Marriot, Sheraton, Serena, Hilton, Radisson. Uganda's investment opportunities showcased in international markets including the Africa Hotel Investment Forum (AHIF) held in Morocco	On track	
8	Build a Mahatma Gandhi International Convention Centre in Entebbe to boost the capacity of the Country to host larger international conferences and events.	Land has been secured in Entebbe and titled (11 acres) for the proposed Mahatma Gandhi International Convention Centre.	On track	Still on track despite procurement processes have slowed down the entire process. To be handled in the next FY
9	Promote conservation of natural and cultural heritage through upgrading key wildlife reserves like Katonga, Pian Upe and Semliki. Conserve natural central forest reserves like Echuya, Budongo, Bugoma, Kalinzu and Maramagambo and create new national parks and wildlife reserves for tourism	Consultations and district resolutions secured for the upgrade of Katonga WR, Toro-Semliki WR, Echuya CFR, Kagombe CFR, Bukaleba CFR, Sangobay CFRs and wetlands, Kasato CFR, Rwengeye CFR, Kyamurangi CFR.	On track	

#	Manifesto Commitments	Achievement	Rating	Comments
10	Establish 10 valley dams in water stressed conservation areas; electric fencing 500km of the identified parts of protected area boundary to mitigate human wildlife conflicts; as well as sustainable management and maintenance of 22 wildlife protected areas.	5 dams were desilted (1dam in Kabwoya, 2 in Kidepo and 2 in Lake Mburo) to enhance their water holding capacity. We have continued to protect, manage and sustain 22 Protected Areas (10 National Parks and 12 Wildlife Reserves) across the country. These cover about 10% of Uganda's surface area. Electric fence constructed (106 kms) in identified parts of protected area boundary for Queen Elizabeth and Murchison falls National Parks	On track	
11	Modernize UWEC to undertake conservation awareness and education around protected areas and increase UWEC visits to 460,000 in FY2024/25 from 365,715 visitors in FY2018/19.	UWEC modernized with major structural improvements such as; New and automated gate constructed and equipped with digital controls and express ticketing system to manage crowds, dormitory restructured into cubical, a fully functioning 64 camera control system installed in place and manned 24/7 to strengthen monitoring and enhancement of general security of the area, an Elephant Enclosure reinforced, cold room (for storage of fresh animal food) powered 24/7 now in place, a world class animal hospital renovated and fully equipped, holdings for animals like Leopards , Lions, etc. reinforced, Primates section reinforced to world class standards, all birds' sections enclosed, information Centre digitalized and equipped with internet to provide timely information, snake section reconstructed to minimize human risks, etc. A total of 260,821 visitors at UWEC had a guided conservation and education tour of cocktail of services offered in there.	On track	The transformation at UWEC over the years has been significant. The safety of both animals and visitors has been increased. The ability to undertake conservation awareness and education around protected areas has too increased, reflected in the increase in number of visitors visiting the Center annually. Number of visitors gradually rising though still low compared to years before covid-19 pandemic period.
12	Regional UWEC satellite center to be established in all major tourism development areas starting with Mbale.	Land secured (60 acres) from NFA in Mbale municipality for the establishment of the Regional UWEC satellite center	On track	
13	Conserve and develop Uganda's cultural heritage through expansion and modernization of the National Museum. Establishment of two regional museums and maintaining the integrity of 100 cultural heritage sites through boundary protection and land titling as well as nomination of three sites to the UNESCO World Heritage List.	Designs and BOQs developed for the expansion of Uganda Museum Three new exhibits established at Uganda Museum i.e Amin, Uganda Apes (Ndahura silverback) and National History Exhibition Uganda @60 Land secured and designs produced for the proposed Fort Portal Museum 20 cultural heritage sites titled. Uganda's Napak cultural heritage site successfully presented and listed as one of the 100 Geo Parks in the World. Completed the renovation of Mugaba Place cultural heritage site in Mbarara. Museums and Monuments Bill enacted.	On track	
14	Develop and enhance the capacity of labor force along the tourism value chain through undertaking on-job training for 20,000 workers as well as apprenticeship for 1,000 Ugandans.	No progress	No progress	
15	Upgrade and transform the Uganda Wildlife Research Training Institute (UWRTI) and Uganda Hotel and Tourism Training Institute (UHTTI) into centers of excellence for wildlife and tourism training and research.	An 80-room 3-star training application hotel constructed at UHTTI in Jinja. UHTTI and UWRTI have been restructured.	On track	Entire civil work complete, finishing (painting, furniture, electricity) work nearly completion before official handover ceremony.

#	Manifesto Commitments	Achievement	Rating	Comments
16	Promote, improve, develop and diversify tourist attractions sites and products including: Equator Point at Kayabwe; Education and health; Road along the Equator; Kagulu Hill and Bishop James Hannington sites in Busoga sub-region; Kitagata, Sempaya, Panyimur, Kibiro, Rwagimba, Amoropii, Ihimba and Amuru hot springs; Mt. Elgon tourism circuit; The Source of the Nile; Nyero rocks; Eclipse site; Fort Patiko; GKMA tourism circuit; Stopover recreation facilities every 100km; The Martyrs' trail; Profile Ugandan culinary tourism; Water-based (marine) tourism; Mountaineering - cable cars and hiking facilities; St. Gonzaga Gonza in Mbulamuti, Kamuli; St. Matia Mulumba Kyebando in Kamuli.	Kagulu Hills tourism product modernized with concrete steps, rail guards and chains, starting platform, two viewpoints, a monument, and a shelter structure to increase tourist competitiveness, safety, capacity of the site and accessibility. Kitagata phase 1 constructed (landscaping, fencing) The proposed Mt. Elgon development project appraised and ready for implementation The Source of the Nile modern pier is under implementation and will have facilities including a dock for 19 boats, a viewing bridge, 2 water fountains and ancillary facilities. Rwenzori mountains hiking facilities established including 2 tourist camps at Nyabitaba, 3,200 meters of boardwalks, 650 metres of climbing ladders. Pre-feasibility study for cable car was done and funds for full feasibility are yet to be secured.	On track	

7. PLANNED PROGRAMME PERFORMANCE FOR THE FINANCIAL YEAR 2023/24

A total budget of Ushs 248 billion was approved for the Tourism Development Programme to implement the approved work plans for the FY 2023/24.

At outcome level, and in line with the NDP III results framework, the Programme is expected to realise a proportion of 28% leisure tourist arrivals; have 20% Ugandan enterprises associating with Uganda's brand; record at least 568,885 Ugandans visiting National Parks, Museums and UWEC; realise Global tourism competitiveness position of 93 out of 136 countries; achieve 77% tourist satisfaction; have at least 12.8% of tourist arrivals as package tourists. The Programme further targets to realise 1.88 million tourist arrivals and generate US\$ 1.774 billion in foreign exchange earnings while contributing 8% of Uganda's GDP.

At output level, the planned deliverables are presented under the respective sub-programmes as follows;

7.1. SUB-PROGRAMME 1: PROMOTE DOMESTIC AND INBOUND TOURISM

1. Explore Uganda brand rolled out in the international markets through brand promotional campaigns, Expo participation, brand training for Missions abroad.
2. Domestic tourism promotion undertaken for increased domestic tourism visitors and revenue through POATE 2024; regional cluster tourism promotion for 6 TDAs, Promotion of key national days and events; media advertising (outdoor, indoor, digital), sports advertising, influencer marketing.
3. Uganda's business opportunities showcased in 4 international MICE markets including IMEX Frankfurt business expo and international conferences hosted by Uganda and Site inspection visits conducted for MICE buyers. Additionally, Government will maintain membership to 3 global MICE associations to support client sourcing – ICCA - International Congress and Convention Association (ICCA), Union of International Associations (UIA); Society for Incentive Travel Excellence (SITE).
4. National MICE audit conducted for 10 major cities to ascertain readiness to host large international events; and Strengthened capacity of stakeholders in MICE and bidding for international meetings, conferences and events to be hosted in Uganda and bids placed to host for 5 international Meetings, Conferences and Events in Uganda.
5. Diverse and improved product ranges developed in collaboration with 12 cities, Local Governments and MDAs i.e. city tourism; Tourism product portfolios developed for 12 cities/towns in the country in partnership with the city authorities and Local Governments; Tourism research studies and surveys conducted and the Tourism Satellite Account produced.
6. High resolution content developed for tourism promotion and advertising in the core and emerging source markets.
7. 80 private sector tourism actors trained in itinerary development for the four regions of Uganda.

7.2. SUB-PROGRAMME 2: INFRASTRUCTURE, PRODUCT DEVELOPMENT AND CONSERVATION

1. Uganda's 10 national parks and 12 wildlife reserves protected and guidance provided for the management of 5 community wildlife areas and 13 wildlife sanctuaries.
2. A total of 335,906 tourists hosted in Wildlife Protected Areas.
3. A total of 1,295 hectares in the protected areas of L. Mburo Kidepo Valley Mt. Elgon Kibaale Pian Upe and Semliki cleared of invasive species and 165ha of degraded areas restored in the wildlife areas of Kapk-wata and Suam and the previously restored areas in MENP and KNP maintained.
4. 22,895 patrols conducted across the country to detect and counter illegal activities in Protected Areas such as poaching and illegal harvest of resources.
5. Law enforcement and undercover operations enhanced through acquisition of 1000 rifles, 20 pistols and 100 hand cuffs. The aircraft and UWA fleet maintained and aircraft fees paid to sustain surveillance and response capabilities.
6. Priority interventions in the Problem animal management strategy (PAM) mainly through maintenance of 106km of Electric fence, 8 Hippo fences and Hippo demonstration cages; elephant trenches; 110 meters of stone wall reinforced with Erythrina.

7. 120 boundary pillars installed;(100 in QENP and 20 in TSWR); 84 km of live marker planted (MENP-50 KM, PUWR-30km and Katonga WR-04km); Routine boundary maintenance conducted (151.5km in MENP-100km, SNP-23KM, TSWR-18.5km, Kabwoya-5km and KNP-5km, 300 pillars in Karuma WR)
8. Communities and Fifty (50) PACU (problem Animal Control Unit) staff trained in problem animal management.
9. 100% of wildlife import/export permit applications processed within one week of application. All Wildlife Use Rights holders in northern, eastern, western, and central Uganda to ensure compliance with the laws; Compliance inspections conducted to ensure compliance to environmental standards for the existing developments and best practices in operating in ecologically sensitive areas.
10. Capacity building of 50 youth (50 male & 50 female) in bird guiding and nature interpretation.
11. Protected Area facilities improved including L. Mburo CA Lakeside Restaurant; Bushiyi Campsite.
12. Facilities and infrastructure established in protected areas including ranger accommodation units in MECA and LMCA; a low cost banda for visitor accommodation in Katonga WR; office/gates at Katunguru Community boat site, Kasenyi, Ishasha and Ruhija; 2 ranger outposts; 3 new radio masts installed in TSWR, BINP and KVNP and communication masts repaired and operationalized in 12 locations; Murchison Top of Falls Trail improved with focus on board walks, tracks, trails and bridges.
13. A total of 3 Small boats (each 10-seater) secured and deployed at Queen, L. Mburo and Murchison Falls National Parks.
14. 10 campsites, 3 campsite shelters and 05 bandas, 03 guest houses, gates, toilets, 30 signage and other tourism facilities maintained and equipped.
15. 5 concessions agreements reviewed- Marasa (Para, Chobe and Mweya), Red Chilli and Jacana 10 new concessions investment opportunities developed based on the GMPs.
16. Conservation awareness and engagements through news features, workshops, talk shows and recorded radio messages; mobile van campaigns and quiz as well as film videos; World Wildlife Day celebrations co-ordinated and held to raise wildlife conservation awareness among 1,000,000 Ugandans targeting male and female natural resource-dependent communities around protected areas and the young people in and outside school.
17. 4 wildlife surveys conducted; (Kabwoya WR/Kaiso Tonya CWA - Ground Survey, Pian Upe Wildlife Reserve - Ground Survey and RMNP, One crocodile survey and one egg nest survey in MFNP).
18. 4 UWA staff trainings conducted (Human Rights Training for Rangers, Refresher trainings for Investigators, Legal officers and finance staff, Mweka College of Wildlife Training & human resource analytics, conflict Management)
19. 158 veterinary rescue operations conducted in all PAs and UWA Diagnostic & Research Laboratory - Mweya accredited and operationalized.
20. White rhinos at Ziwa Rhino Sanctuary maintained and protected.
21. 70% of reported problem crocodiles and snakes translocated from the communities to PAs
22. 350 individual animals (constituting 60 species) maintained, fed, rehabilitated and veterinary services provided at UWEC.Wildlife animal rescue (at least 90% of all reported animal rescue cases)
23. A total of 490,000 visitors hosted at UWEC and taken through wildlife conservation education and awareness. General guided conservation Education tours conducted for 370,000 learners, 3400 Institutions of learning and 120,000 other visitors 4 CE programs developed.
24. 5 Conservation Education Programs in Schools and Communities implemented; 45 Wildlife Clubs of Uganda (WCU) supported to enhance Conservation Education (CE) in Schools and 5 National/ International CE events organized and implemented in collaboration with stakeholders.
25. UWEC modernized with construction of wall fence and a pier.
26. 15 cultural heritage sites of Wedelai, Partiko, Nyero, Kafir, Mukongoro, Dolwe, Barlonyo, Mugaba Palace, Kakoro, Mugaba, Fort Thurston, Bigo Byamugenyi, Kibiro, Mutanda caves and Komuge maintained and opened to tourists.
27. Three museums of National Museum, Kabale and Soroti maintained and services opened to the public hosting 110,000 tourists during the year.
28. Eight (8) Museums and cultural heritage sites developed for cultural tourism and heritage conservation

promotion namely Kikorongo Equator monument (in Kasese District); Karamoja Museum and handcraft center (in Moroto district); Napak Open Air Museum Interpretation centre; Fort Portal Regional Museum and handcraft center; Kibiro community Interpretation centre; The Martyrs trail including Katoosa Martyrs site Kyenjojo; The Centre of Uganda (Amolatar District); Kabalega-Mwanga site in Dokolo district as well as 10 Luweero Triangle monumental graves.

29. Boardwalks (12,689 metres) established along the Rwenzori Kilembe and Central circuit trails; The Rwenzori central circuit trail improved with expansion of width to 1.5 metres (2 kms stretch for Nyabitaba - John Matte section and 3 km stretch for the John Matte – Bujuku stretch); Rwenzori Elena camp development completed and operationalized with cold-proof facilities to accommodate 40 tourists and 60 guides/ support personnel; Rescue, safety and climbing equipment provided to improve the Rwenzori hiking experience and safety.
30. Rwenzori mountaineering tourism product developed with completion and operationalization of the Rwenzori Elena camp with cold-proof facilities to accommodate 40 tourists and 60 guides/ support personnel; establishment of 8,000 metres of boardwalks along the trails; Hiking equipment and service providers trained in mountaineering visitor handling to improve visitor experience and increase community participation in the provision of tourism services.
31. The Source of the Nile modern pier established and completed with facilities including a dock for 19 boats, a viewing bridge, 2 water fountains, outdoor restaurant, sanitary, vehicle parking area, relaxing gardens, staff station and offices, security station and waiting lobbies; A Resettlement action plan for Source of the Nile finalized.
32. Kitagata hot springs completed. The product will enrich the South western tourism circuit and will increase tourism activity and the resultant benefits to the host community including jobs, market.
33. Kafu tourist stopover development done with production of designs and plans, landscaping, and structures.
34. Private sector supported to participate in local, regional and global tourism value chains and a total of four (4) handicraft and souvenir production centres supported with tools and training to produce competitive and high-quality products for export.
35. Tourism roads; Hoima International Airport and expansion of Entebbe International Airport

7.3. SUB-PROGRAMME 3: REGULATION AND SKILLS DEVELOPMENT

1. National tourism decentralization, planning, development and capacity building strategy and Toolkit for the local governments and other stakeholders developed and disseminated.
2. Tourism Information Management System operationalized (TIMS) and 25 tourism data collection centers across the country equipped to implement TIMS.
3. A total of 600 students enrolled at UHTTI (including 200 new) and trained; field attachments conducted for all UHTTI finalist students; 2 regional training clinics conducted.
4. A total of 280 enrolled at UWRTI including 120 new students in the different programmes; 2 students in internship attachments done in wildlife related organisations; Field based practicals conducted for 280 students; 4 UWRTI Training Curricula revised and modularized; and 3 short tailor-made training programmes conducted in tour guiding, Nature interpretation and driving.
5. Tourism Regulations Enforced (150 tour and travel companies registered; 150 tour and travel companies inspected; 100 Tourist Guides registered, 300 assessed for licensing; 200 Tourist Guides licensed; 500 accommodation facilities registered, 500 inspected, 400 licensed).
6. 150 accommodation facilities graded; 450 registered and licensed tourism service providers trained in service standards, emerging trends for tourism product development and service delivery
7. Wildlife Pet or Ornaments Regulations developed; Uganda Wildlife (Trade Regulations) gazetted and disseminated National Action Plan for Conservation of the Shoe Bill disseminated; Uganda Wildlife (Compensation Scheme) Regulations and the Uganda Wildlife (Revenue Sharing) Regulations disseminated Wildlife Farming and Ranching Regulations developed.



Swallow-tailed Bee-eater

8. PROGRESS OF ACTIVITIES UNDER PROGRAMME GOVERNANCE AND MANAGEMENT

8.1. INTRODUCTION

Government of Uganda adopted the Programmatic Approach to Planning and budget implementation effective FY2020/21 guided by NDP III national priorities. Twenty (20) Programmes were created to actualize the aspirations of NDP III enshrined in the National Vision 2040. Guided by Office of the Prime Minister, National Planning Authority and Ministry of Finance Planning and Economic Development. Tourism Development Programme was among the 20 Programs created to implement the Programmatic Approach to planning and Budgeting.

8.1.1. Tourism Development Programme Mission Statement:

To promote the development of sustainable tourism, wildlife and cultural heritage resources in order to significantly contribute towards the socio-economic transformation of Uganda from a peasant society to modern and prosperous one:

8.1.2. Tourism Development Programme Strategic Objectives

The goal of the Ministry over the next five years is to increase Uganda's attractiveness as a preferred tourist destination. The following strategic objectives guide the implementation process:

Objective 1: To Promote domestic and inbound tourism;

Objective 2: To develop a pool of skilled personnel along the tourism value chain and ensure decent working conditions;

Objective 3: To develop, conserve and diversify tourism products;

Objective 4: To increase the stock and quality of tourism infrastructure;

Objective 5: To enhance regulation, coordination and management of the tourism Program;

8.1.3. Expected programme outcome deliverables

- i) Increase annual tourism revenue from USD 1.45bn to USD 1.862bn
- ii) Maintain the contribution of tourism to total employment at 667,600 people;
- iii) Increase inbound tourism revenues per visitor from USD1,052 to USD 1,500;
- iv) Maintain the average number of International Tourists arrivals from USA, Europe, Middle East, China and Japan at 225,300 tourists;
- v) Increase the number of direct flights routes to Europe and Asia from 6 to 15.

8.2. PROGRESS ON THE STATUS OF IMPLEMENTATION OF ACTIVITIES UNDER TOURISM DEVELOPMENT PROGRAMME WORKING GROUP

8.2.1. Composition of the Membership to the Tourism Development Programme Working Group

In order to operationalize the Tourism Programme Working Group (TDPWG), membership was drawn from MDAs, Development Partners, Civil Society and other Non-State Actors. There is a total of 38 active members namely;

Ministry of Tourism, Wildlife and Antiquities, Uganda Tourism Board (UTB), Ministry of Works and Transport (MoWT), Uganda National Roads Authority (UNRA), Uganda Civil Aviation Authority (CAA), Ministry of Finance, Planning and Economic Development (MoFPED), Ministry of ICT and National Guidance (MICT &NG), Ministry of Internal Affairs (MIA), Ministry of Local Government (MoLG), Uganda Police Force (UPF), Uganda Tourism Association (UTA), Uganda Wildlife Authority (UWA), Uganda Hotel and Tourism Training Institute (UHTTI), Uganda Wildlife Research Training Institute (UWRTI), Uganda Wildlife Conservation Education Centre (UWEC), National Planning

Authority (NPA), Ministry of Water and Environment (MoWE), Ministry of Trade, Industry and Cooperatives (MTIC), Kampala Capital City Authority (KCCA), Ministry of Gender, Labor and Social Development (MOGLSD), Uganda Export Promotion Board (UEPB), Uganda Broadcasting Corporation (UBC), National Council of Sports (NCS), Civil Society, Uganda Airlines, Ministry of Foreign Affairs (MoFA), and Uganda People's Defence Forces (UPDF).

The inaugural meeting was held on 13th October 2020. Items for deliberation included the following: Presentation of NDP III and the Program Approach to Planning and Budgeting, Presentation of Terms of Reference for the Tourism Development Programme Working Group and Presentation and discussion of the NDP III Tourism Development Programme Implementation Action Plan (PIAP). The Permanent Secretary, Ministry of Tourism, Wildlife and Antiquities as Technical Leader, chairs the Program Working Group.

8.2.2. Creation of Technical Working Groups and setting up of the Secretariat

In order to support the programs and activities of the Tourism Development Programme Working Group, a Secretariat was set up headed by the Director, Tourism Wildlife and Antiquities (Secretariat Technical Leader). The Secretariat Staff are composed of Officers drawn from Departments and Agencies of the Ministry. The following Technical Working Groups were created to support the activities and programs of the Tourism Development Programme Working Group:

- i) Regulation and Quality Assurance Technical Working Group;
- ii) Natural and Cultural Heritage Technical Working Group;
- iii) Skills Development Technical Working Group;
- iv) Marketing and Promotion Technical Working Group; and,
- v) Product Development and Infrastructure Technical Working Group.

Each of these Technical Working Group has an appointed Chairperson and Deputy with a membership of 30 drawn from the public and private sectors. All the Sub- Committees are operational and have held numerous meetings.

8.2.3. Performance of the Tourism Development Programme Working Group

- i) Considered and approved the NDP III Tourism Development Program Implementation Action Plan (PIAP) FY2020/2021-2024/25
- ii) Alignment of the annual budgets to the National Development Plan III and the PIAP
- iii) Reviewed and approved the Tourism Development Programme Budget Framework Papers for the 3 years
- iv) Supported the identification and appraisal of projects and so far, 4 project concept notes approved by the Programme Working Group have been approved by the Development Committee.
- v) Policy Development Process: Considered and approved the Road Map and Inception Report for undertaking Regulatory Impact Assessment (RIA) to Inform the Development of a Gender Equality Policy in Tourism Development Programme.
- vi) Reviewed and approved the Tourism Development Programme Annual Performance Reports

8.2.4. Challenges faced by the Tourism Development Program Working Group

- i) Programme Working Groups are inadequately funded, hence hindering high level performance of the program in fulfilling their mandates. Resources are required for office operations, staffing, capacity building of members including familiarization activities to fully understand tourism operations.
- ii) Secretariat is not fully constituted with full time staff to fill in the performance gaps due to inadequate staffing levels;
- iii) Lack of adequate office space and office equipment to provide conducive working environment for the staff.

8.2.5. Recommendations

- i) Government should adequately budget for Programme Working Groups given the widened scope under NDP III;
- ii) Recruit permanent Staff for the Secretariat as recommended under the Terms of Reference for National Development Plan (NDP III) Program Leadership-December 2022).
- iii) Provide for office space and equipment for the Secretariat to enhance their performance.

9. IMPLEMENTATION CHALLENGES AND MITIGATION MEASURES

The Tourism Development Programme is still facing numerous challenges including:-

1. Inadequate resources for the various interventions of the Tourism Development Programme. During the first 3 years of the NDP III, the Ministry and Agencies received only 20% of the planned funding for the entire 5-year period. This hampered the implementation of several commitments and the funding gap needs to be mitigated if we are to achieve a faster Tourism recovery as well as the achievement of commitments in the NRM manifesto and the NDP III. The relevant authorities have been engaged and although still low, the funding has improved from Ushs 199 billion in FY 2022/23 to ushs 148 billion for the next FY 2023/24. Additionally, strategies have been put in place to increase Non -Tax Revenue collections to over Ushs 200 billion by the year 2028.
2. Low levels of product development to keep the tourists much longer and spend more. This is largely due to the limited funding available for product development. The Ministry spends several years developing a product yet the same product can be developed in one year if adequate resources are available. Priority products have been identified and resources enhanced for their development.
3. Lack of land for the development of tourism sites such as the Entebbe Convention Centre, Kayabwe Equator point, Regional UWEC centres. Appropriate approaches have been deployed to secure land e.g the land for UWEC regional centres has been secured from National Forestry Authority while the certificate of title for the site for the proposed Entebbe Convention centre in Entebbe has been processed. The Resettlement action plan for Source of the Nile has been produced to guide compensations.
4. Encroachment on the wildlife and cultural heritage sites and lack of land titles for most of the cultural heritage sites. Priority has been given to titling of cultural heritage sites and at least 20 sites are surveyed and title certificates processed annually.
5. Inadequate staffing and skills across the sector is problem existing both in the tourism private and public sector. Upgrading of UHTTI and UWRTI into centres of excellence for tourism and hospitality training and wildlife research and training respectively, is being undertaken and infrastructure development of these two institutions is underway. Restructuring has been undertaken.
6. Human Wildlife Conflicts, poaching and illegal wildlife trade, wildfires and Invasive Species. UWA has recruited, trained and deployed additional 868 rangers to strengthen Protected Areas surveillance and management.
7. Uncompetitive Destination- The Study by the World Travel and Tourism Council (WTTC: 2018) ranked Uganda relatively uncompetitive, only a head of 4 countries (no.136) out of 140 countries assessed. The areas of consideration included Health and Hygiene, Air transport infrastructure, ICT and Safety and security. The GOU is working on tourism support infrastructure and services to enhance competitiveness.
8. Insecurity arising from political instabilities in some of the neighbouring states, election violence, disease outbreaks such as Ebola, the negative media coverage of public probes, the LGBTQ bill, have counteracted destination marketing and revenue generation efforts.
9. Negative perception of the destination in the aftermath of the 2022 Ebola outbreak affected the destination's promotion efforts that translated into a reduction in tourist arrivals. Intensified domestic and international media relations to depict a positive destination image in regard to health, safety and security.
10. Inadequate regulatory framework. There is lack of operational regulatory framework regarding the development and management of the tourism development Levy, Tourism Development Fund and licensing fees for tour operators and tour guides. The Bill for the Tourism law is under consideration. Additionally, a study has been conducted on the Framework for Harmonization of Taxes and Licenses and the study finds are being considered for reforms.
11. Gaps in the Tourism Coordination Framework. The Tourism Development Programme Working Group lacks dedicated funding and staffing. The ministry has endeavoured to keep the Programme Working Group operational and the staffing process is underway.

APPENDIX

Table: 20 Global Tourism Performance, 2019-2022

Tourist Arrivals	Year of Travel (Millions)				Change (%) Vs. Previous year 22/21	Recovery (%) vs. 2019
	2019	2020	2021	2022		
World	1,465	407	456	963	111.3	66
Regions						
Europe	744	240	305	595	95.0	80
Asia and the Pacific	360	59	25	101	305.2	28
Americas	219	70	82	156	90.9	71
Africa	69	19	20	47	137.2	67
Middle East	73	20	25	66	163.5	90

Source: UNWTO, 2023

Table: 21 Tourism Performance in Africa and Regions

EAC Partner States	2019	2020	2021	2022	Change (%) Vs 2022- 2021	Change (%) Vs 2022- 2019	Recovery (%) Vs. 2019
Africa	69	19	20	47	136.0	-32.6	67
North Africa	25.6	5.6	6.6	19	187.9	-25.8	74
Subsaharan Africa	43.4	13.1	13.1	27.5	109.9	-36.6	63

Source: UNWTO, 2023

Table: 22 Tourism Performance among EAC Partner States

EAC Partner States	2019	2020	2021	2022	Change (%) Vs 2022- 2021	Change (%) Vs 2022- 2019	Recovery (%) Vs. 2019
Kenya	2,035	580	871	1,484	70.4	-27.1	73
Rwanda	1,634	497	510	1,105	116.8	-32.3	68
Uganda	1,543	473	513	815	58.9	-47.2	53
Tanzania	1,527	621	923	1,455	57.6	-4.7	95
Burundi	1,399	527	274	330	20.4	-76.4	24
DRC	479	202	382		-100.0	-100.0	0
TOTAL	8,617	2,900	3,473	5,189	49.4	-39.8	60

Source: UNWTO, 2023

Table: 23 Tourism Arrivals to Uganda by Purpose, 2019-2022

Purpose	2019	2020	2021	2022	Percent	%Age Change
Business & Professional	390,043	302,871	128,236	297,453	36.5%	132.0%
Leisure & Holiday	376,391	10,811	46,165	95,394	11.7%	106.6%
Others	226,225	94,801	169,272	110,247	13.5%	-34.9%
Visiting Friends and Relatives	549,961	64,602	169,272	311,414	38.2%	84.0%
TOTAL	1,542,620	473,085	512,945	814,508	100%	58.8%

Source: MTWA Statistical Abstract 2023

Table: 24 Regional Distribution of Tourists to Uganda by Purpose, 2019-2022

Region	2019	2020	2021	2022	% Change 2022-2021	% Change 2022-2019
Africa	1,044,144	420,115	459,359	714,576	55.6%	-31.6%
America	150,796	11,776	9,651	17,590	82.3%	-88.3%
Asia	31,339	18,665	20,813	40,172	93.0%	28.2%
Europe	248,869	18,112	16,329	27,814	70.3%	-88.8%
Middle East	29,864	2,293	2,314	3,472	50.0%	-88.4%
Oceania	37,608	964	433	1,614	272.7%	-95.7%
Unspecified		1,160	4,046	8,847	118.7%	
Total	1,542,620	473,085	512,945	814,085	58.7%	-47.2%

Source: MTWA Statistical Abstract 2023

Table: 25 Monthly Tourist Arrivals to Uganda, 2019-2022

	2018	2019	2020	2021	2022	Recovery
TOTAL	1,505,669	1,542,620	473,085	512,945	814,508	52.8%
1st QUARTER	357,642	369,821	141,256	126,473	154,808	41.9%
January	123,492	125,321	56,446	39,946	49,554	39.5%
February	116,730	121,899	49,781	40,355	46,882	38.5%
March	117,420	122,601	35,029	46,172	58,372	47.6%
2nd QUARTER	360,491	376,282	91,806	121,102	200,269	53.2%
April	117,590	122,760	24,338	39,686	65,319	53.2%
May	122,374	127,734	28,922	42,402	66,429	52.0%
June	120,527	125,788	38,546	39,014	68,521	54.5%
3rd QUARTER	401,056	397,638	116,811	121,598	211,445	53.2%
July	132,512	132,289	42,214	37,719	72,082	54.5%
August	141,916	133,254	40,301	43,249	69,869	52.4%
September	126,628	132,095	34,296	40,630	69,494	52.6%
4th QUARTER	386,480	398,879	123,212	143,772	247,986	62.2%
October	119,152	124,277	40,864	46,256	79,219	63.7%
November	124,843	130,194	41,267	48,073	77,932	59.9%
December	142,485	144,408	41,081	49,443	90,835	62.9%

Source: MTWA Statistical Abstract 2023

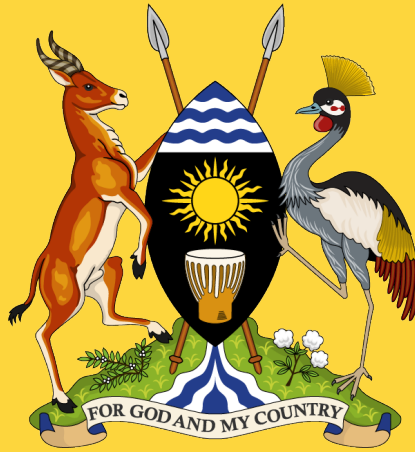
Table: 26 Visitation to Uganda's National Parks

National Parks and Wildlife Reserves	CY 2019	CY 2020	CY 2021	CY 2022	Perc Share 2022	Recovery From 2019
Murchison Falls National Park	103,665	33,194	78,655	146,649	40%	41%
Queen Elizabeth National Park	77,995	24,362	40,488	95,340	26%	22%
Bwindi Impenetrable National Park	36,341	9,829	15,736	32,628	9%	-10%
Lake Mburo National Park	33,188	10,727	18,741	28,540	8%	-14%
Semliki National Park	22,577	7,322	14,403	26,631	7%	18%
Kibale National Park	19,521	5,558	7,789	15,641	4%	-20%
Kidepo Valley National Park	12,648	4,860	7,846	8,343	2%	-34%
Rwenzori Mountains National Park	6,043	1,151	1,048	5,659	2%	-6%
Mgahinga Gorilla National Park	7,593	2,409	3,455	5,477	1%	-28%
Mount Elgon National Park	3,519	1,006	780	1,246	0.3%	-65%
Pian Upe Wildlife Reserve	-	336	516	915	0.2%	
Toro Semliki Wildlife Reserve	771	512	378	471	0.1%	-39%
Katonga-Wildlife Reserve	-	65	153	329	0.1%	
Total	323,861	101,331	189,988	367,869		

Source: MTWA Statistical Abstract 2023







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