



## **Ministry of Tourism, Wildlife and Antiquities**

### **MTWA Statistical Bulletin** **Vol 3**

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## Tourism Stakeholders trained in Tourism Satellite Accounts

Uganda's tourism sector has moved a step closer to the development of a **Tourism Satellite Account (TSA)**. The Satellite Account is used by many developed countries to assess the total impacts (both direct and indirect) of tourism to the country's economy. Currently the country relies on data published by the World Travel and Tourism Council (WTTC) which are normally derived based on simulations from Oxford Economics global macroeconomic forecasting models and usually don't reflect the actual impacts.

Thanks to the United Nations Economic Commission for Africa (UNECA) and Ministry of Tourism, Wildlife and Antiquities (MTWA), the dream is yet to be realized.

The Ministry, working closely with Uganda Bureau of Statistics (UBOS) requested the UN body to address capacity gaps such as human resource skills as one of the steps towards collecting, analyzing and Quality Tourism data while following TSA guidelines put in place by the World Tourism Organization (UNWTO).

A one week training workshop in Entebbe organized by the UN body brought together all the key stakeholders in Uganda's tourism sector ranging from government institutions such as *Bank of Uganda (BOU), National Planning Authority (NPA), (UTA), Civil Aviation Authority (CAA), Ministry of internal Affairs (MIA), Ministry of Tourism, Wildlife and Antiquities (MTWA), Uganda Bureau of Statistics (UBOS), Uganda Revenue Authority (URA), Makerere University, Uganda Wildlife Authority (UWA)* to private sector bodies like *Association of Uganda Tour Operators (AUTO), Uganda Hotel Owners Association (UHOA), Uganda Tourism Association.*



Private Sector bodies were well represented

The training also institutionalized the stakeholders into a TSA committee that will spearhead collection and dissemination of tourism statistical data, which will put Uganda ahead of other African countries in TSA implementation making her the third to only Rwanda and South Africa in owning a Tourism Satellite Account in Africa.



The team composed of 19 tourism stakeholders representing 12 institutions

Since tourism is Uganda's leading foreign exchange earner, generating an annual **USD 1.35 bn** (about **23.5%** of total exports) according to MTWA Statistical abstract 2016, producing reliable and timely statistical information will guide in sector strategic planning and investment to yield more benefits for the country. The sector is followed by remittances from abroad and coffee which earn the country **USD 1.10bn** and **0.40 bn** respectively.

Tourism had created **464,500** jobs by 2015 and another **708,000** indirect and induced jobs, according to World Travel and Tourism Council (WTTC).

To underscore the importance of tourism statistical information, one needs to look at the contribution of travel and tourism to world GDP which is currently estimated at **USD 7.6 trillion**, a total of **10.2%**. The sector now supports 292 million people in employment, about **1 in 10 jobs** on the planet.

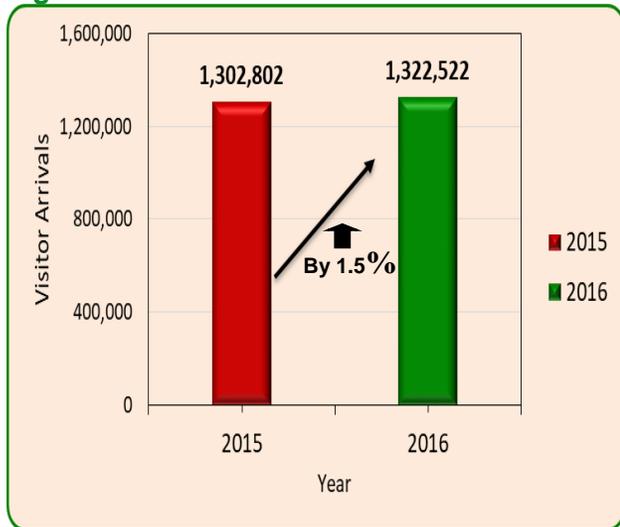
Some of the tourism statistics that will guide the TSA process are already being published by the Ministry and sister agencies like UBOS and Bank of Uganda (BOU). This ranges from accommodation statistics, visitor arrivals, employment statistics, tourist expenditure, to mention but a few. Other data required will be obtained from surveys to be conducted starting in September 2017. (*The inbound Tourist Survey and the domestic Tourism Survey*).

# Comparative Overview of visitor arrivals to Uganda

## Introduction

Throughout the year 2016, Uganda attracted a total of **1,322,522** visitor arrivals. This translates to an increase of **1.5%** when compared to the **1,302,802** arrivals recorded in 2015.

**Figure 1: Visitor Arrivals**

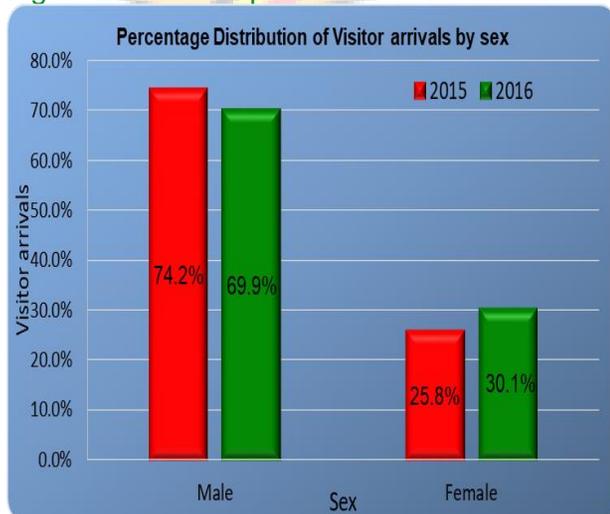


Source: Uganda Bureau of Statistics

## Demographic Profile

Among total visitor arrivals the distribution of demographic characteristics remained relatively constant over the period under review, while experiencing mixed rates of growth.

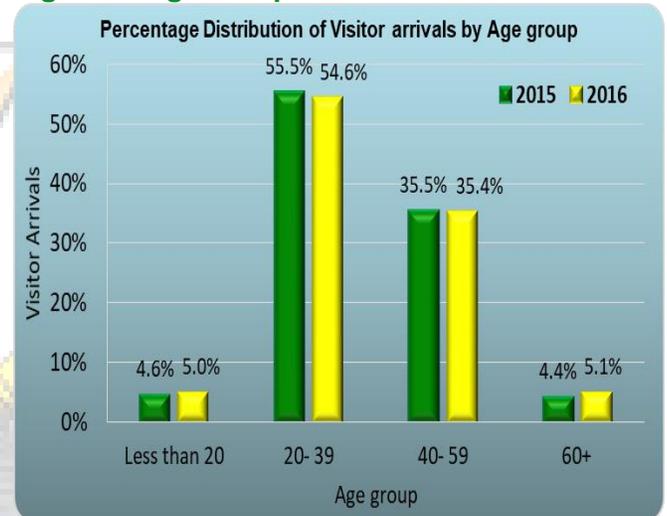
**Figure 2: Sex Composition of visitor Arrivals**



Source: Uganda Bureau of Statistics

Figure 2 shows that over the review period, the majority of visitor arrivals were males. In 2016, **74.2%** of Visitor arrivals or **924,221** visitors were male while females represented **396,521** tourists or **25.8%** of total visitor arrivals. The statistics of 2016 compared with those of 2015 shows that there was a reduction of **4.2%** in number of male visitors and an increase of **18.2%** in the number of females.

**Figure 3: Age Composition of Visitor Arrivals**



Source: Uganda Bureau of Statistics

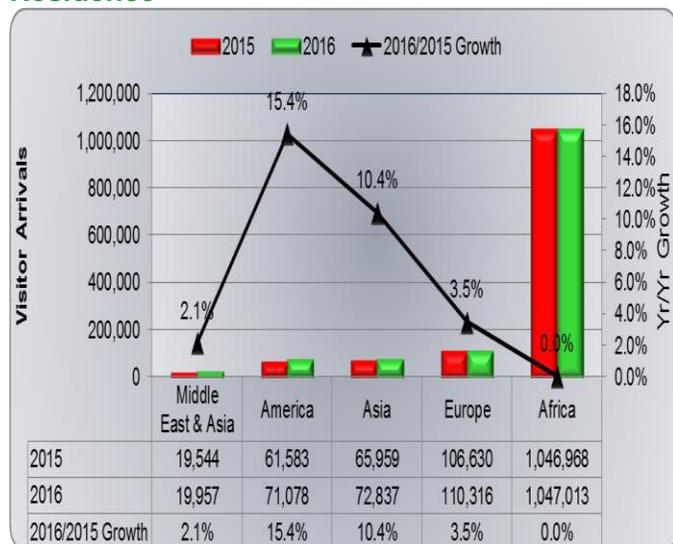
With respect to the age distribution of visitor arrivals, **Figure 3** illustrates the domination of overnight arrivals by visitors aged 20-59 years. Those 20-39 years of age represented **54.6%** of total visitor arrivals in 2016, while those 40-59 years accounted for **35.4%**. Arrivals by children under the age of 20 and adults 64 years and over accounted for **5.0%** and **5.1%** of total visitors correspondingly. Growth rates in visitor arrivals by age group ranged from a low of **0.4%** among visitors 20-39 years of age and peaked at **17.9%** among those 64 years and over.

## Visitor arrivals by Country of residence

A review of visitor arrivals by Region of residence status also revealed consistency in distribution over the review period (see **Figure 4**). Africa represented the vast majority of visitor arrivals with a **79.2%** share in 2016, marginally below the share of **80.4%** recorded in 2015. This translates to a **0.004%** increase in arrivals by visitors from the African region when compared to 2015.

The highest shares in visitor arrivals were also evidently seen from regions of Europe, Asia and America as shown in figure 4 below;

**Figure 4: Visitor Arrivals by Region of Usual Residence**



Source: Uganda Bureau of Statistics

## Market Analysis

An analysis of the top ten source markets for Uganda revealed that most visitors to Uganda (82 percent) come from the following source markets;

**Table 1: Source Markets**

S/N	Country	2015	2016	%Share 2016	Growth(%) 2016-2015
1	Rwanda	300,747	362,865	27.4%	20.7%
2	Kenya	409,417	352,817	26.7%	-13.8%
3	DR Congo	79,430	90,148	6.8%	13.5%
4	Tanzania	95,933	86,091	6.5%	-10.3%
5	USA	49,414	57,959	4.4%	17.3%
6	United Kingdom	40,851	39,539	3.0%	-3.2%
7	Sudan	45,221	35,353	2.7%	-21.8%
8	India	26,671	30,210	2.3%	13.3%
9	China	17,051	19,175	1.4%	12.5%
10	Germany	9,585	10,586	0.8%	10.4%
	Rest of World	228,482	237,779	18.0%	4.1%
	<b>Total</b>	<b>1,302,802</b>	<b>1,322,522</b>	<b>100%</b>	<b>1.5%</b>

Source: Uganda Bureau of Statistics

**Figure 5** clearly shows that with the exception of source markets of *Kenya, Tanzania, United*

*Kingdom and Sudan*, visitor arrivals in 2016 outperformed those in 2015

**Figure 5: Visitor Arrivals by Market**



Source: Uganda Bureau of Statistics

Rwanda dominated the visitor market with a total of **362,865** tourists; a market share of **27.4%** (Table 1). The Rwanda market recorded positive growth of **20.7%**, which was the highest level of growth among visitor markets. Visitor arrivals from Kenya totaled **352,817** tourists, down by **13.8%**.

USA visitor arrivals increased by **4.4%** over 2015 to **57,959** visitor arrivals in 2016. India, China and Germany visitor arrivals grew over the period by **13.3%**, **12.5%** and **4.1%** respectively.

The remaining countries of Kenya, Tanzania, United Kingdom and Sudan all dropped by **13.8%**, **10.3%**, **3.2%** and **21.8%** respectively (see Figure 5). It can be noted that in the top ten (10), 50% were African countries specifically the neighboring countries and 50% were from outside Africa.

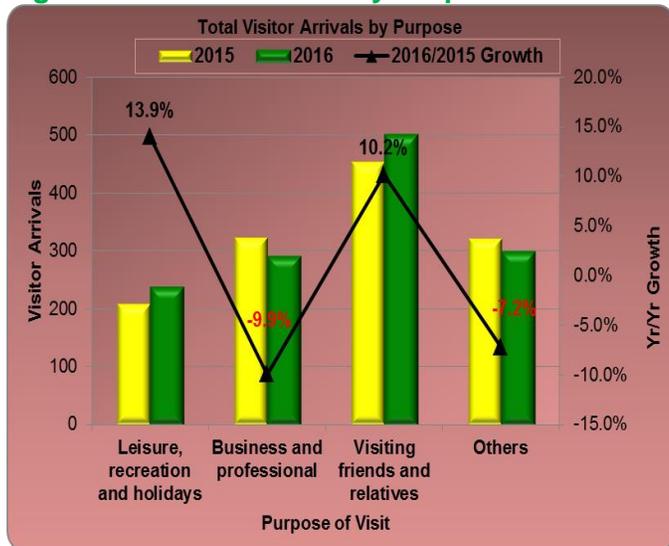
## Purpose of Visit

Among total visitor arrivals to Uganda in 2016, **237,312** visitors or **17.9%** came for Leisure, recreation & Holiday, representing a **13.9%** increase when compared to 2015. Visitors who came on business or to attend conferences stood at **289,932** or **21.9%** and those that came to visit their friends and relatives constituted

37.7% of total visitor arrivals or 498,745 arrivals.

Figure 6 shows that the majority of visitor arrivals came into the country to visit friends and relatives followed by those who came on business or to attend conferences then those who came for Leisure, recreation and holidays.

Figure 6: Visitor Arrivals by Purpose



Source: Uganda Bureau of Statistics

The most significant growth level was achieved among visitors who travelled to Uganda for Leisure, recreation and holiday, which showed positive growth of 13.9% when compared to 2015 and those who travelled to visit friends and relatives, which showed positive growth of 10.2% when compared to 2015. Declines in arrivals were recorded among visitors who came for purposes of Business and Professional Conferences (9.9%) and Other (7.2%).

### Length of Stay

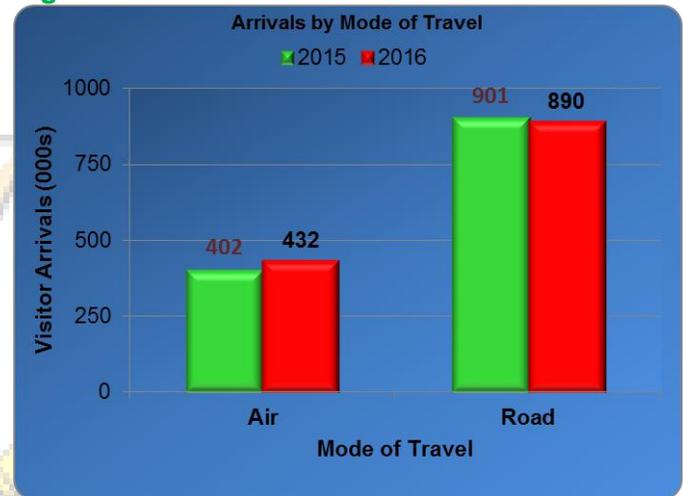
In 2016, the average intended length of stay among total visitors was 7 days; this was equivalent to the 7 days spent on average in 2015.

### Mode of Travel

There two major forms of travel into and out of Uganda namely Air and Road, Out of 22 gazetted entry points, only Entebbe International Airport can be accessed by air. The other points are only accessible by road.

The number of visitor arrivals by air transport increased from 402,207 in 2015 to 432,282 or 32.7% visitor arrivals in 2016, reflecting a 7.5 percent increase in air travel. The majority of the visitor arrivals used road as mode of travel.

Figure 7: Mode of Travel



Source: Uganda Bureau of Statistics

The number of visitor arrivals by road declined from 901,595 in 2015 to about 890,240 or 67.3% in 2016. Katuna, Busia, Malaba, Cyanika and Mutukula were the major land entry borders used.

### 2016/2015 Highlights

- ✓ Visitor Arrivals in 2016 totaled 1,322,522 (↑ 1.5%)
- ✓ Gender ratio for 2016 visitor arrivals: 285 males per 100 females.
- ✓ Most tourists were aged 20-39 years in 2016 (↑ 0.4%).

# Five Year Review

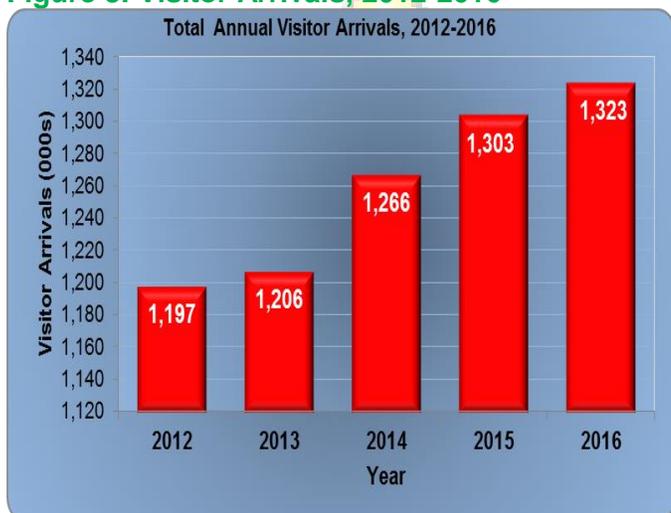
## Introduction

This section presents a concise report on visitor arrival trends for visitor arrivals over the period 2012-2016.

## Visitor Arrivals

A consistency in visitor arrivals to Uganda is clearly indicated by **Figure 8**, which shows that the country continues to surpass levels of tourist arrivals previously achieved.

**Figure 8: Visitor Arrivals, 2012-2016**



Source: Uganda Bureau of Statistics

Figure 8 shows a consistent trend in the number of visitors from 1.197 million visitors in 2012 to 1.323 million visitors in 2016.

**Table 2: Visitor Arrivals from EAC Partner states, 2012-2015**

Country of Residence	2012	2013	2014	2015	2016	2017	2016/2015 Growth (%)
<b>Arrivals</b>							
Burundi	40	34	41	46	47	3.6%	2.2%
Kenya	393	381	361	409	353	26.7%	-13.7%
Rwanda	256	280	348	301	363	27.4%	20.6%
Tanzania	80	74	57	96	86	6.5%	-10.4%
<b>Total EAC Arrivals</b>	<b>769</b>	<b>769</b>	<b>807</b>	<b>852</b>	<b>849</b>	<b>64.2%</b>	<b>-0.4%</b>
Other Countries	428	437	459	451	474	35.8%	5.1%
<b>Total Annual Visitor Arrivals</b>	<b>1,197</b>	<b>1,206</b>	<b>1,266</b>	<b>1,303</b>	<b>1,323</b>	<b>100%</b>	<b>1.5%</b>

Source: Uganda Bureau of Statistics

## 2016/2015 Highlights (cont'd)

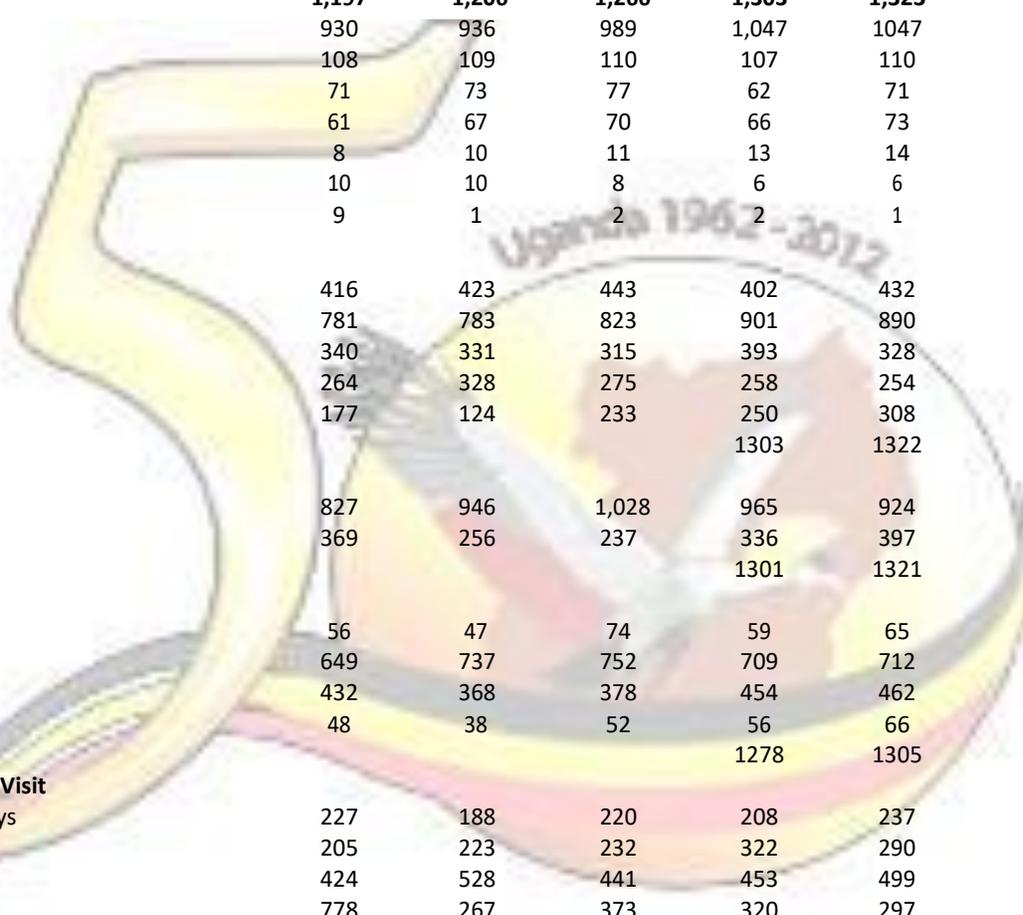
- ✓ The Rwanda market showed significant improvement in the supply of tourists (↑20.7%).
- ✓ Visitor Arrivals from the United Kingdom visitor market fell by 4,230 (↓3.2%).
- ✓ Kenya and Tanzania markets also dropped (↓13.8% & ↓10.3% respectively)
- ✓ 17.9% of visitors came for Leisure, recreation & holiday (↑13.9%).
- ✓ Business or conference visitor arrivals declined (↓9.9%).
- ✓ The average length of stay was maintained at 7 days.
- ✓ Air arrivals rose to 432,282 (↑7.5%).
- ✓ Most Visitor arrivals are from the African continent followed by Europe then Asia and America
- ✓ Visitors who came to see friends and relatives increased to 498,745 (↑10.2%)

# Appendix

Table 3:

Summary of Main Indicators

	2012	2013	2014	2015	2016	2016/2015 Growth (%)
<b>Total Visitor Arrivals</b>	<b>1,197</b>	<b>1,206</b>	<b>1,266</b>	<b>1,303</b>	<b>1,323</b>	<b>1.5</b>
<b>Visitor Arrivals by region</b>	<b>1,197</b>	<b>1,206</b>	<b>1,266</b>	<b>1,303</b>	<b>1,323</b>	<b>1.5</b>
Africa	930	936	989	1,047	1047	0.0
Europe	108	109	110	107	110	2.8
America	71	73	77	62	71	14.5
Asia	61	67	70	66	73	10.6
Middle East	8	10	11	13	14	7.7
Oceania	10	10	8	6	6	0.0
Other & Not Stated	9	1	2	2	1	-50.0
<b>Mode of Travel</b>						
Air	416	423	443	402	432	7.5
Road	781	783	823	901	890	-1.2
Busia and Malaba	340	331	315	393	328	-16.5
Katuna	264	328	275	258	254	-1.6
Other Border Posts	177	124	233	250	308	23.2
				1303	1322	
<b>Sex</b>						
Male	827	946	1,028	965	924	-4.2
Female	369	256	237	336	397	18.2
				1301	1321	
<b>Age group (Years)</b>						
Less than 20	56	47	74	59	65	10.2
20- 39	649	737	752	709	712	0.4
40- 59	432	368	378	454	462	1.8
60+	48	38	52	56	66	17.9
				1278	1305	
<b>Visitor Arrivals by purpose of Visit</b>						
Leisure, recreation and holidays	227	188	220	208	237	13.9
Business and professional	205	223	232	322	290	-9.9
Visiting friends and relatives	424	528	441	453	499	10.2
Others	778	267	373	320	297	-7.2



**Table 4: Key Source Markets to Uganda**

Country of Residence	2012	2013	2014	2015	2016	2016/2015 Growth (%)
<b>Africa</b>	<b><u>929,569</u></b>	<b><u>935,983</u></b>	<b><u>988,641</u></b>	<b><u>1,046,968</u></b>	<b><u>1,047,013</u></b>	<b><u>0.004%</u></b>
Rwanda	256,004	280,431	348,175	300,747	362,865	20.7%
Kenya	393,369	380,614	360,664	409,417	352,817	-13.8%
DR Congo	42,604	49,925	55,628	79,430	90,148	13.5%
Tanzania	79,795	74,485	57,197	95,933	86,091	-10.3%
Sudan	43,258	40,067	49,281	45,221	35,353	-21.8%
Ethiopia	6,466	5,432	6,099	6,298	7,020	11.5%
Egypt	2,080	2,494	2,658	2,644	3,211	21.4%
Other Africa	105,993	102,535	108,939	107,278	109,508	2.1%
<b>America</b>	<b><u>70,749</u></b>	<b><u>73,075</u></b>	<b><u>76,616</u></b>	<b><u>61,583</u></b>	<b><u>71,078</u></b>	<b><u>15.4%</u></b>
USA	55,912	56,766	60,226	49,414	57,959	17.3%
Canada	10,186	9,729	10,424	9,124	9,863	8.1%
Other America	4,651	6,580	5,966	3,045	3,256	6.9%
<b>Asia</b>	<b><u>61,192</u></b>	<b><u>66,814</u></b>	<b><u>70,002</u></b>	<b><u>65,959</u></b>	<b><u>72,837</u></b>	<b><u>10.4%</u></b>
India	24,849	28,647	29,620	26,671	30,210	13.3%
China	8,645	10,792	14,633	17,051	19,175	12.5%
Japan	4,186	3,889	4,029	3,179	3,791	19.3%
Pakistan	2,950	3,085	2,419	2,864	3,790	32.3%
Other Asia	20,562	20,401	19,301	16,194	15,871	-2.0%
<b>Europe</b>	<b><u>108,364</u></b>	<b><u>108,641</u></b>	<b><u>110,476</u></b>	<b><u>106,630</u></b>	<b><u>110,316</u></b>	<b><u>3.5%</u></b>
United Kingdom	42,508	43,009	36,577	40,851	39,539	-3.2%
Germany	11,701	11,070	11,824	9,585	10,586	10.4%
Netherlands	8,275	7,510	8,781	8,247	9,165	11.1%
Italy	6,732	7,128	5,859	6,776	7,153	5.6%
Denmark'	3,890	3,426	3,513	4,360	5,404	23.9%
Sweden	5,866	5,670	5,559	5,028	5,265	4.7%
Belgium	5,094	5,050	5,045	4,623	5,240	13.3%
France	4,938	4,594	4,180	4,694	5,041	7.4%
Austria	2,132	1,724	5,623	3,574	3,245	-9.2%
Norway	2,705	2,543	3,833	3,160	3,228	2.2%
Russia	4,250	3,542	5,397	3,582	2,536	-29.2%
Switzerland	2,362	2,896	1,932	2,212	2,298	3.9%
Ireland	2,414	1,694	1,708	1,601	1,579	-1.4%
Czechoslovakia	383	536	404	497	877	76.5%
Finland	642	490	612	512	450	-12.1%
Yugoslavia	26	24	54	86	56	-34.9%
Other Europe	4,446	7,735	9,575	7,242	8,654	19.5%
<b>Middle East</b>	<b><u>8,105</u></b>	<b><u>10,424</u></b>	<b><u>10,525</u></b>	<b><u>13,391</u></b>	<b><u>13,668</u></b>	<b><u>2.1%</u></b>
<b>Oceania</b>	<b><u>9,551</u></b>	<b><u>10,421</u></b>	<b><u>8,256</u></b>	<b><u>6,153</u></b>	<b><u>6,289</u></b>	<b><u>2.2%</u></b>
Australia	7,165	7,842	6,420	4,969	4972	0.1%
New Zealand	690	598	840	787	823	4.6%
Other Oceania	1,696	1,981	996	397	494	24.4%
<b>Others &amp; Not Stated</b>	<b><u>9,235</u></b>	<b><u>976</u></b>	<b><u>1,530</u></b>	<b><u>2,118</u></b>	<b><u>1,321</u></b>	<b><u>-37.6%</u></b>
<b>Total</b>	<b><u>1,196,765</u></b>	<b><u>1,206,334</u></b>	<b><u>1,266,046</u></b>	<b><u>1,302,802</u></b>	<b><u>1,322,522</u></b>	<b><u>1.5%</u></b>