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REVIEWING UGANDA'S TOURISM SECTOR FOR ECONOMIC AND SOCIAL UPGRADING




BY
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The Economic Policy Research Centre (EPRC) is an autonomous not-for-profit organization established in 1993 with a mission to foster sustainable growth and development in Uganda through advancement of research –based knowledge and policy analysis. Since its inception, the EPRC has made significant contributions to national and regional policy formulation and implementation in the Republic of Uganda and throughout East Africa. The Centre has also contributed to national and international development processes through intellectual policy discourse and capacity strengthening for policy analysis, design and management. The EPRC envisions itself as a Centre of excellence that is capable of maintaining a competitive edge in providing national leadership in intellectual economic policy discourse, through timely research-based contribution to policy processes.

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ABSTRACT

In tourism the use of sector's employment opportunities and contribution to gross domestic product (GDP) as a measure of its performance may be deceptive as the sector is prone to foreigners domination and has a lot of 'leakages'. Global production network (GPN) analysis is becoming popular analytical frameworks for understanding industries like tourism. In this paper, we review literature on global production networks, with a focus on the tourism sector in Uganda. The main objective of the study is to establish information availability and point out existing information gaps in understanding Uganda's participation in the tourism GPN with respect to economic and social upgrading/downgrading. It was observed that the tourism sector remains an important avenue for economic growth and poverty reduction, and has experienced growth in investment along the value chain, attractiveness and operational complexity. Information gaps were observed on levels of functional integration among tourism actors, impacts of tourism on employment and poverty reduction among gender and social classes and factors that will affect trajectory for social and economic upgrading/downgrading for the tourism actors in Uganda.

1. INTRODUCTION

Although the development of a tourism industry is viewed as an engine of economic growth and development in the inbound country, the sector is mostly dominated by foreigners and has a lot of 'leakages' which may hinder achievement of expected results. Gross domestic products (GDP) growth and total employment used as indicators of a country's economic development may be deceptive, as some economies are characterised by foreign capital domination, limited local backward and forward linkages, and locals are only employed in low skill and labour-intensive jobs. Tourism is viewed as an important sector especially in developing countries, due to a number of advantages and economic growth opportunities it offers. Tourism advantages includes: source of employment; potential linkage with other sectors; provides opportunities for off-farm diversification (particularly in areas that do not attract other types of development options); is a foreign exchange earner; generates demand for assets (e.g. natural resources and culture); creates initial demand for goods and services; delivers consumers to the product rather than the other way around; is associated with infrastructural development in remote places, and offers a relatively rapidly growing market (Roe, et al. 2004).

In a country like Uganda, which is interested in both macroeconomic and inclusive growth, the use of GDP alone may not be a sufficient measure of wellbeing. With the massive globalisation of production led by multinational companies, especially in developing countries, the use of industrial net income may mask the details behind economy performance. Some industries in developing countries are export-oriented, implying that their economic development has to consider moving into higher productivity and higher value-added aspects of production and export. Global value chain (GVC) or global production network (GPN) analysis are becoming popular analytical frameworks for understanding the overall structure of industries, their geographical dimension, actors driving the industry, and the ability or difficulties for countries and firms to economically and socially upgrade. Although sectors with value chain hierarchies across countries may result in lopsided economic benefits, they have advantages, in that network flagships transfer both explicit and tacit knowledge to local actors, especially in the less developed countries, through informal mechanisms (Ernst and Kim, 2002).

Initially, global value chain analysis focused on the commercial dynamics between firms in different segments of production chains. In the recent past, however, it has evolved to examine not only the interaction between lead firms and suppliers, but also the whole range of actors that contribute to influencing and shaping global production, such as the government, multinational organisations, and civil societies. GVC has widened its scope to consider the social and institutional embeddedness of production, and power relations between actors, which vary as sourcing is spread across multiple developing countries (Barrientos, *et al.* 2010). In this paper, we review literature on global production networks, with a focus on the tourism sector in Uganda. The main objective of the study is to establish information availability and point out existing information gaps in understanding Uganda's participation in the tourism GPN with respect to economic and social upgrading/downgrading.

2. IMPORTANCE OF TOURISM IN UGANDA

Tourism contributes significantly to Uganda's gross domestic product, provides significant investment opportunities and employment and is a major source of foreign currency. Table 1 shows the estimated contribution of tourism to Uganda's economy in 2011 and prospects for 2021.

Table 1. Estimates and forecast of tourism's contribution to the Ugandan economy, 2011 and 2021

	2011			2021		
	US$ million[1]	% of total	Growth[2]	US$ million	% of total	Growth[3]
Direct contribution to GDP	682	3.2	8.9	1198	3.1	5.8
Total contribution to GDP	1628	7.6	7.7	2887	7.4	5.9
Direct contribution to employment[4]	181	2.7	5.6	250	2.6	3.3
Total contribution to employment[4]	447	6.6	4.4	625	6.4	3.4
Visitors export	743	14.6	10.9	1282	13.3	5.6
Domestic spending	397	1.9	5.9	703	1.8	5.9
Leisure spending	393	2.8	-3.5	720	1.8	6.2
Business spending	752	3.5	17.1	1275	3.2	5.4
Capital investment	216	4.6	3.6	355	4.4	5.1

[1]2011 constant prices and exchange rate; [2]2011real growth adjusted for inflation (%); [3]2011-2021 annualised real growth adjusted for inflation (%); [4]'000 jobs.
Source : World Travel & Tourism Council 2011

The direct contribution of tourism to GDP in 2011 has been estimated at 3.2 percent of the total income, a value that is slightly lower than that recorded in 2009 of 3.4 percent (UBoS, 2010a). Other tourism contributions to the country's economic welfare include 7.6 percent of total GDP, and 2.7 and 6.6 percent of direct employment and total employment, respectively. The industry has growth potential in all aspects in the next decade, entailing government attention through research, management and policy interventions. The industry is forecasted to expand in all major aspects, except leisure spending, which will decline by 3.5 percent in 2021. Although the sector is expected to experience positive growth in all its aspects, including direct and indirect contribution to GDP, employment and different spending options by 2021, its proportional contribution to GDP will decline compared to current levels. This implies that other sectors of the economy will expand more than the tourism. While the benefit of tourism at the macro-level appears enormous and promising, it is important to understand the microeconomics aspects of the sectors. Although the actors at various levels of the tourism production chain are known, no value chain analyses have been done. Secondary data available from Uganda Bureau of Statistics (UBOS) are quite general and may be insufficient to conduct value chain analysis.

Although the gross return from the tourism sector is always presented in the UBOS annual *Statistical Abstract*, detailed analysis of the actors may be hampered by the way the data is presented. Activities in tourism are considered to be hotels and restaurants, and transport and communication. This presentation is very broad and includes other sectors that are outside the scope of tourism – for example, local public transportation for other purposes, e.g. reporting for duties, is not a tourism activity. It is difficult to delineate the contributions of tourism actors from such a broad categorisation, and for specific global production networks. The amounts earned by different value chain actors whether Uganda's or foreign global networks have not been documented.

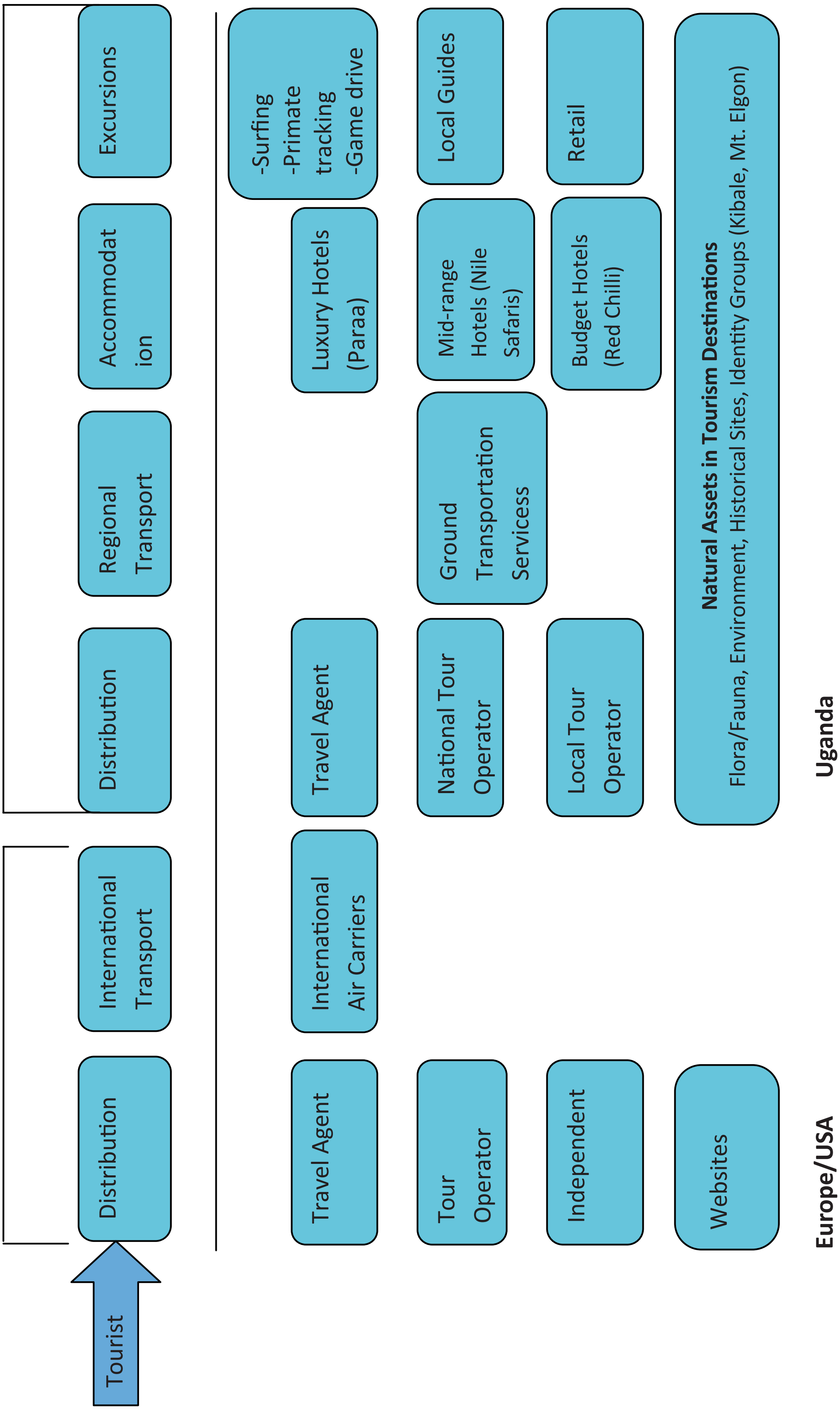
Tourism is prioritised among eight primary sectors out of the 18 productive and supportive sectors that will transform the country from a peasant society to a modern and prosperous economy in the next 30 years (GoU, 2010). The government has therefore recommended a number of interventions necessary for development of the sector, including: developing and reviewing all policies; creating a legal and regulatory framework for the sector; and increasing the contribution of tourism to GDP and employment. These interventions are very general and also fail to integrate other government priorities, including poverty reduction and inclusive growth. The interventions are also silent on the role various stakeholders would play in the sector's development. Lack of information on value chain notwithstanding, incorporation of government priorities and role of stakeholders in the tourism plan will improve the sectors' success. If specification of stakeholders' role and targets were made clear in the tourism plan monitoring and the need for economic and social upgrading would have been simplified.

3. TOURISM GLOBAL VALUE CHAIN

3.1 Outbound country

As in most countries' tourism value chains, Uganda's has a set of actors in outbound countries and others operating within its geographical jurisdiction. The functions of marketing and facilitating travel or distribution activities reach product consumers in their country of abode. Here the distribution systems include tour operators, who provide information on tour package options and link consumers to the product. The travel agents provide logistics services that ensure that consumers reach their destinations. The internet has been a strong marketing tool and has provided a preview of products. Websites for Ugandan tour operators provide information on tour packages globally and are accessible by outbound country markets. Most tour operators have websites with Marasa Holding, Uganda Travel Bureau, etc., showing spectacular previews of tourism attractions. In some cases, an individual visiting for business and family reasons ends up touring some local attractions. Although the outbound countries production networks are very important for the Uganda's tourism, documentation on their activities, their linkages with local actors and how they could influence or respond to the process of economic and social upgrading of local country tourism is unknown. It is suspected that some outbound actors have invested heavily in the inbound value chain, either through vertical or horizontal integration. Yet no study has documented levels of investments by either Ugandan or foreigners in an effort to improve the tourism sector in the country. Figure 1 shows the Uganda tourism global value chain.

Figure 1: Uganda's tourism global value chain



Source: Adapted from Christian 2011-

3.2 International Airlines

A number of international air carriers serve the country through the sole international airport at Entebbe (EIA) about 45km from the capital city. Major air carriers operating in Uganda are shown in Table 2. Kenya Airways is the most frequent airline in Uganda. British Airway makes five trips to Entebbe every week from London. Brussels Air has combined trips to Entebbe with those to Kigali and Nairobi. Air Emirates route to Entebbe from Dubai includes Addis Ababa, Ethiopia. Although KLM Royal Dutch partners with Kenya Airways, it also makes five trips weekly to Entebbe. Other air lines serving Uganda include Ethiopian, South Africa and Turkish Airlines. Regional airlines include Air Uganda, Rwanda Air Express, Fly540 and Precision Air.

Table 2. Airlines serving Uganda tourism through the Entebbe International Airport in June 2011

Company	Company Headquarter (Hub)	Destinations/ operations	Weekly flights to hubs	Proportional flights (%)
Air Uganda	Entebbe Uganda	Departures (5 EA cities)	36	-
Rwanda air Express	Kigali	Regional	14	-
Kenya Airways	Nairobi	International	28	42
British Airways	London	International	5	8
Brussels Air	Brussels (Kigali/Nairobi)	International	3	5
South African Airline	Johannesburg	International	7	11
Ethiopian Airline	Addis Ababa	International	7	11
Air Emirates	Dubai (Addis Ababa)	International	7	11
Fly 540	Nairobi	Regional	7	-
Turkish Air	Istanbul	International	3	5
Precision Air	Arusha	Regional	-	-
KLM	Amsterdam	International	5	7

Source: Authors' own compilation, 2011.

Little information is available on the employment and economic benefits of airline business to the country. The role and benefits derived by various nationals of different gender and education from the airline business is yet to be documented. . Qatar Airways' entry to Uganda, in 2011 provided an opportunity for 19 employment positions for its office in Kampala. The 19 were to join 15,000 other employees from 100 countries. The position advertised included a Sales Manager, two Sales Executives, a Sales Support Agent, Reservation Supervisor, five Reservations Agents, an Airport Services Manager, an Airport Services Duty Officer, five Senior/ Airport Service Agents, an Executive Secretary and a Driver/Messenger. Six of the positions required degree holders, while others were expected to have between two and 10 years of experience on the duty they were to perform (*Daily Monitor Newspaper*, 10 August 2011). These vacancies were not shown in the company's website, implying they were targeted at the local market.

Indirectly related to the airline business are returns and employment opportunities provided by the Uganda Aviation Authority (CAA) and the airport activities, including the duty-free shops and other personal and cargo handling services. No assessment or analysis has been done along the tourism value chain to determine what types of intervention are necessary for improving benefits from airlines. It is also important to establish factors attracting airlines to Uganda, existing opportunities and challenges to entry. While a link exists between airlines, travel agents and tour operators; the type of relationship and ease of entry into such a relationship in Uganda is still undocumented. The effect of technological change (e.g. online booking) on employment and economics benefits, and opportunities for increasing gains from technological change also need to be established.

3.3 Travel and tour operators

The regulation framework of the tour and travel operators is provided by the Uganda Tourism Act 2008, the Tourist Agents (Licensing) Regulation, 1972 and The Tourist Agents (Licensing) Act (1968). The regulations aim at standardising and harmonising firms' operations and consider issues to do with location, staff and their qualifications, capital requirements, and annul licensing fees. While the regulation frameworks may appear to be based on old guidelines, updates have been provided by newer documents (GoU, 1992; GoU, 2009a).

Entry to either the tour operator or travel agent business is quite easy, with interested individuals required to fulfill the above regulatory framework. The major issues of concern are location, number of staff members and their qualifications, capital requirements, and annual licensing fees. Requirements for anyone wishing to be a tour operator include: registered company; a minimum share capital of US$10,000; at least nine staff members (managing director, tour manager, reservation officer, accounts officer, secretary, two trained guides and drivers); and registration of vehicles intended for use with the Ministry of Tourism. Annual licence for a tour operator costs US$50. Those intending to operate as travel agents are required to have a minimum authorised capital of US$50,000, one vehicle for administrative duties, which should be clearly marked with the company's name, a model staff structure, consisting of a managing director, reservations/ticket officer, accounts manager, and office messenger. Firms are also required to prove membership of the Association of Uganda Travel Agents (TUGATA). The annual licence for travel agents is charged at US$30. Other requirements for both travel and tour operators registration include provision of details of vehicles to be used, a copy of the trading licence, and proof of membership to the Association of Uganda Tour Operators (AUTO). The minimum education requirements for the employees to occupy any of the positions in either tour operator or travel agent companies are also provided. The labour requirement for the model staff is quite modest, with the highest education requirement being an Advance Education Certificate (A level). Considering that the country has a number of universities and tertiary institutions, Uganda is able to provide labour force for tour and travel operators.

Limited information exists on operations of travel and tour operators in Uganda. The Uganda Tourist Boards (UTB) has embarked on a process of establishing firms, operating as travel and tour operators, their contact locations and adherence to the regulations. UTB has already listed about 170 travel and tour companies operating in the country (see Appendix 2). Information on 93 percent of the companies operating travel and tour businesses is found on the internet. Four out of 10 companies were found to be also operating in other countries, including 21 and 20 percent in developing and developed countries, respectively. A number of travel and tour operators provided their company's profiles for the Fifth Africa-Asia Business Forum, which was interested to link local travel and tour operators to the Asian outbound agents (AABF, 2009). From the listed companies, it was observed that employment opportunities were low, with most having fewer than five members of staff, although reporting high turnover and investment. Travel and tour operators were observed to be involved with other businesses, including manufacturing, hotel management, agriculture and other services (school management and insurance). Most of the firms are new and their incorporation could have coincided with market opportunity in the in-bound country. In 2007, the country hosted the Commonwealth Heads of Government Meeting (CHOGM), which was well advertised and inculcated investors in the tourism sector, some of whom received other incentives from the government (Kibikyo, 2011). Uganda seems to be young in the tourism sector, considering that it had political turmoil in the 1970s and early 1980s, with some conflict reported later in the Northern part (Collier and Reinikka, 2001). The conflict contributed to a poor image abroad that led to the decline and stagnation of the sector (Teye, 1986). Promotion activities through the media improved the image and perceived risk (Lepp, 2011), leading to the observed positive growth.

Travel and tour operators act at two levels within the tourism value chain. In the outbound country, tour operators provide guidance on the opportunities for tourism in Uganda. Working in collaboration with the Uganda-based actors in the value chain, they provide packages to tourists. Outbound travel agents provide logistics for tourists visiting Uganda in air travel, accommodation and itinerary, based on clients' interests and financial means, and available tourism products in the destination. Websites and internet communications across the globe are changing the operations of these actors, since tourists can learn directly about attraction products options, book airline online, communicate directly with, e.g. hotels in Uganda, and make reservations. Travel agents and tour operators in the outbound country have been involved in tourism exhibitions in the outbound country by Uganda's hotels, air lines servicing the country and local travel and tour operators.

Cases of vertical and horizontal integration are common among tour and travel operators. Some tour and travel companies have their main offices in outbound countries and branch (es) in Uganda. Volcano Tours have offices in both USA and UK, and locally in Uganda and Rwanda. Others carry different names in outbound and in inbound countries, e.g. Uganda Travel Bureau operates also as American Express and offers various services in Uganda, including African safaris, air travel, hotel accommodation, car rentals, tours, travel insurance, visa sourcing, holiday packages and other tailor-made safaris and travel plans. Information on travel agents and tour operators' ownership and relationship with outbound country tour operators has not been documented.

Migration data across borders indicates tourists crossing to Kenya and vice versa. It is important to have a deeper understanding on the relationship between the two countries. While most of these tourists appear to be independent travellers using transboundary public transport across the countries, some are directed to tour operators in either of the countries from other operators in the first landing country. Since the tourism infrastructure is more to the central and western parts of Uganda, connection from Kenya tourism pockets (Mombasa and Nairobi) to more central Kampala and Jinja via long-haul buses is logistically effective. It is not known whether tourists pay the whole package in one country where the operators organise transport, accommodation and excursion, even in the second country. Overland tourists visiting multiple countries have been crossing from either Kenya to Uganda or otherwise. What is yet to be established are the starting and departure points for these 'overlanders', although it is suspected that they originate from either South Africa or Kenya.

No analytical study on Ugandan tour and travel operators has been identified in the literature and it is therefore difficult to establish what opportunities and challenges the operators experience. Opportunity for research exists on analysis of the role played by tour and travel operators, their contribution to the tourism global network production and opportunities for social and economic upscaling.

3.4 Hotels

Globally, hotels serving niche customers are classified in internationally recognised categories (as from one- to five-star hotels), based on ratings systems such as the Automobile Association (AA) and its American counterpart the (AAA) and the Michelin Red Guide. In Uganda such classification has not been done, although impetus was high prior to the CHOGM. Yet among industry actors, some hotels are considered to either belong to certain star classifications based on size, perceptions, services, prices and comparison with others. The widely used classification of hotels in Uganda is based on prices charged. Hotels are therefore classified into luxury hotels, mid-range hotels and budget hotels.

a) Luxury hotels: example of hotels in these range include Serena, Sheraton and Speke in Kampala. Others may include Paraa, Mweya, Chobe and Jacana in the national parks. Luxury hotels are more sophisticated in equipment, services and management and charge higher fees compared to others. More financial outlay is required to invest in such facilities and quality services call for better trained and motivated human resources. Luxury hotels have a history of government ownership, and longer duration of service. The 10 percent ownership of hotels by government (Obot, 2011) is at this level.

b) Mid-range hotels: this category of hotel is not as sophisticated in facilities and charges less than the luxury hotels. The differentiation with the luxury hotels except on charges is not clear. This category of hotel requires high capital for investment and has attracted bigger companies with business interests elsewhere and in chains of hotel ownership. Hotels in this category include Nile Safaris Lodge, Hotel Africana, Protea and Golf Course Hotel.

c) Budget hotels: except for the prices charged and tourist numbers served, it is difficult to differentiate this category of hotels from some mid-range and the unclassified. Except for marketing costs and management expertise, it is quite inexpensive to start a hotel of this category, especially in the areas around the protected areas. Some tour operators own hotels in this category as an entry to accommodation services, e.g. African Pearl Safaris. Examples of hotels in this category include Fairway (Kampala) and Red Chilli in Murchison Falls National Park.

Since hotel categorisation aims to assure customers of quality, the criteria used in Uganda may not provide a very good indicator of quality without consideration of location, available hotels and clients' financial capacity. Due to proximity to an attraction, a hotel may charge high fees and therefore be considered more luxurious than a hotel with better services further away. For example, Masindi Tourist Lodge at the entry town to Murchison Falls National Park (MFNP) could be better equipped and could offer more and better services than a hotel and camp right in the park, but due to price and lack of marketing it may not be captured in the above categorisation. Red Chilli Camp and Sambiya River Lodge (SRL), although found in the same MFNP, attract tourists with a different priority of product choice, with the former interested in game drives, and the latter in Falls sighting and sport fishing. They may be rated the same, but SRL has sophisticated facilities and with increased numbers of clients, improved management and a hike in prices it could as well be rated as a luxury hotel.

Commission provision to tour operators, who recommend and deliver clients to hotels, influences whether a hotel will be categorised or not. Tour operators provide marketing services to hotels if they are in agreement on charging tour operators' clients a lower rate than the rack rates charged to any other customer. While tour operators' interest may influence the accuracy of categorisation, and may hinder incentives for economic upgrading, it has been observed elsewhere that ratings based on describing quality, as influenced by price, may be more accurate than those provided by national authorities, as the former are better informed

(Clerides et al., 2008). An all-inclusive classification system based on set standardisation will not only benefit clients, through improved services, but will also provide hotels with guidelines on which specific areas or products to improve (Minazzi, 2010).

Hotels in environmental adventure areas, also referred as lodges, have been providing tour packages, especially those products associated with their locations. By having many branches, lodges have been able to compete with tour operators. For example, Geo-Lodges operates lodges in seven different protected areas and through its expansion to various attraction sites has been able to market a wide range of tour packages. Although still managing hotels, Geo Lodges is now one of the biggest tour operators. Hotels in the capital city have been known not to operate tours, but a new trend is being observed, whereby hotels open a travel desk and are able to execute successful tours to the wilderness. Most hotels' front desks also offer travel information and services. Charges for entry to Bujagali Falls (along the Nile at Jinja) are collected by Speke Hotel, an indication that the hotel is managing the site and diversifying from business and professional accommodation provision to environmental adventure tourism services.

Information on hotels' financial operations and human resources is limited. Most hotels are known to be owned by Ugandans, with the major ones owned by a few individuals and managed through hotel chains, although with different brand names. Among the country's large hotels, seven are owned and operated by Ruparelia Groups, three by Marasa Holdings, six by Imperial Group and seven by Geo-Lodges. These hotels form part of many other businesses owned by the individuals or companies. For example, Marasa Holdings is part of Madhivani Group. The Group has many business in Uganda, Kenya, Europe and Asia, with its activities in Uganda contributing about 10 percent of the country's GDP (Kibikyo, 2011). Geo-Lodges is owned by Allan Group, which is also known to be involved in the steel/manufacturing industry. An information gap exists on hotels' share of income from the total spending on tourism. Although most hotels are owned by Ugandans, it has been observed that most management positions and in some instances supervisory roles are performed by foreigners from developed countries (e.g. USA, Britain and Canada) and other developing countries (Kenya, South Africa and Nepal etc). No documentation exists on employment opportunities at various levels of hotel, employees' nationality, gender, education levels and remuneration by category of service.

Table 3 shows the major hotels in Uganda, their location, classifications and ownership.

Hotel Name	Location	Rating	Owner /management
Serena Hotel	Kampala	Luxury	TPS Serena Groups, (shares at NSE, Kenya)
Serena Hotel	Entebbe	Luxury	
Sheraton	Kampala	Luxury	GoU, Sheraton Hotel Groups
Speke Resort	Kampala	Luxury	Speke Hotels, Ruparelia Groups of Company, Ugandan
Speke Hotel		-	
Kabira County Club		-	
Tourist Hotels	Kampala	Budget	
Imperial Royale	Kampala	Luxury	Imperial Groups of hotels, Ugandan
Imper. Resort Beach	Entebbe	Mid-range	
Imperial Botanical	Entebbe	Mid-range	
Nile Safari Lodge	MFNP	Mid-range	Geo-Lodges (Allan Groups), Ugandan
Jacana Safaris	QENP	Luxury	
Rain Forest Lodge	Mabira Forest	-	
Silver Back Lodge	BINP	-	
Paraa Safari Lodge	MFNP	Luxury	Marasa Holding (Madhivani Group), Ugandan
Chobe Safari Lodge	MFNP	Luxury	
Mweya Safari Lodge	QENP	Luxury	
Nile Tourist Resort	Jinja	Mid-range	Mada Groups of Company (Kenyan)
Gorilla Forest	BINP	-	Sanctuary Retreat, London (13 other hotels in Africa)
Red Chilli Rest Camp	MFNP/Kampala	Budget	Steve Willi's family (British)

Source: Author 2011.

Although they play an important part in the country's national domestic products (GDP), contributing about eight percent of total national income in 2010 (UBOS 2010a), little analytical research has been done on the hotel industry in the country. Tukamushaba and Katongore (2009) prioritised human resources development in quality service improvement in the Kampala hotels ahead of beautification, infrastructural development and price interventions. While such a study is important for the sector, its focus on local users, who may be restricted to small uncategorised hotels, limits its use, especially when dealing with the tourism sector. The National Development Plan acknowledges a lack of adequate human resources, particularly in tourism promotion, hotels and restaurants, tour and travel, leisure and hospitality, as a major constraint on the tourism sector. It recommends reviewing tourism and wildlife manpower training curricula, enhancing the capacity of tourism and wildlife tertiary institutions through in-service staff training and developing Uganda Hotel and the Tourism Training Institute into a fully fledged university college (GoU, 2010). Little is known about how the tourism industry impacts on the agricultural sector, especially in local areas. Hotels are the major link between the tourism and agricultural sectors. The supportive roles tourism plays to agriculture and vice versa need to be established.

3.5 Local communities in tourism areas

Natural resources attraction-based tourism thrives on a limited exploitative use of resources, which denies the local community opportunities to maximise production, considering the available resources. Local communities are major stakeholders, as they are the custodian (wildlife reserve) or represent part of the tourism experience through the products they create based on their historical and cultural connection to locations. How the local community benefits from tourism is important for distributive justice. Although communities are perceived to be benefiting through employment (especially non-specialised jobs) and market opportunities for their produce, either handcrafts or agriculture, little is documented about such returns, or the employment opportunities for local communities within the chain, their numbers and levels of education, and the specific role they play compared to others from the cities.

Benefits and resources sharing schemes have been reported in protected areas in Uganda (EPRC, 2011) but the criteria used and the share allocations are not clear. Although UCOTA represents those involved in trading with tourists, information on the level of representation for local communities is sparse. It is also important to highlight the costs incurred by communities around the wildlife estates, especially when animals stray onto their farms, causing damage to crops, livestock and even human life (EPRC, 2011), thereby affecting livelihood and giving rise to negative attitudes towards tourism.

3.6 Government

Government activities in the tourism sectors have been in two broader areas, including providing policy guidelines and direct involvement of government agencies. The sector is guided mainly by the National Tourism Policy (2003) and the Uganda Wildlife Policy (1999). In 2010, the government launched its five-year development strategies for the country, which recognised tourism as one of the keys for transforming the economy. Specifically, the government aims to focus on operationalising the tourism development levy fund, developing marketing tools, packaging the country as a preferred tourism destination, strengthening tourism and wildlife information systems, securing international and domestic source markets for tourism, diversifying tourism products, regulating tourism product development, supporting the development of tourism enterprises, developing tourism human resources, tourism support infrastructure, and strong public and private sector institutional linkages, undertaking research to support the industry, and improving human-wildlife relationships, among others (GoU, 2010).

Other important policy frameworks that have aided the tourism sector include the launch of Integrated Tourism Development Master Plan (1992), a policy document defining the role of government and other stakeholders in the development of tourism. For its part, the government committed itself to promoting the tourism industry, both inside and outside the country, ensuring conservation of wildlife and other resources of natural scenic and scientific value that attract tourism, establishing training facilities on wildlife and hotel and tourism and ensuring that there is a ministry with capacity to serve the sector.

The government provides budgetary support to the Ministry of Trade, Tourism and Industries (MTTI) and institutions under it that deal with tourism, including Uganda Tourism Board (UTB) and Uganda Wildlife Authority (UWA). In some instances, the government has been reported to offer resources to some private actors in the tourism sector (Kibikyo, 2011).

Through UWA, the government goes beyond a supportive role in the tourism sector, and is a direct actor in the value chain. UWA is the final product service provider and therefore an important stakeholder in the tourism industry. UWA is a statutory body established by the Uganda Wildlife Act 2000. Its mandate includes: i) management and conservation of wildlife, both in and outside the protected areas; ii) promoting public participation in wildlife management using mechanisms such as wildlife use rights and community conservation programmes, as a means of eradicating poverty and promoting wildlife as a form of land use; iii) ensuring the protection of rare, endangered and endemic species of wild plants and animals, through provision of appropriate wildlife policies, management plans and promotion of best practices in wildlife management; iv) ensuring timely and appropriate responses to reported problem animals, in collaboration with the communities concerned and their respective local authorities; v) enhancing economic benefits from wildlife management through promotion of tourism; vi) implementing relevant international treaties, conventions, agreements or other arrangements to which Uganda is a party. UWA is responsible for the management of 10 national parks, 12 wildlife reserves and seven wildlife sanctuaries and provides guidance over the management of five community wildlife areas.

Through a benefit sharing scheme, UWA shares 20 percent of park entry fees with the local community, mostly through social amenities (schools, health facilities, bridges) and infrastructure development, after agreeing on specific projects with the local government (Shah and Muramira, 2001). Controversies have been associated with the scheme, concerning the perceived purposes, differences and secrets around the amount collected, high expectations, and delayed or lack of remittance for projects (Wild and Mutebi, 1996). UWA publishes its financial returns annually and records various sources of income and expenses. Only 14 percent of the wildlife estates are able to cater for their operational costs (UWA, 2010). The government finances about 75 percent of UWA recurrent budgets (UEPB, 2006) – an indication that the management of estates is not profitable. Although several studies have shown that the wildlife estates have high economic benefit potential (Moyini and Uwimbabazi, 2000; UEPB, 2006), financial returns have remained dismally low (EPRC, 2011). No practical solution has been provided on how to improve financial return on this important tourism value actor. Opportunities for improving the economic and social welfare of Ugandans from proceeds of the wildlife estates are yet to be established. While their productivity is low, their conversion to other uses, especially agriculture, may not be feasible, due to the high reversibility costs (EPRC, 2011). There is a need to establish factors that will encourage tourism in the wildlife estates, and the practical strategies that will improve the attractiveness as tourist destination.

3.7 Tour guides

Tour guiding is an important link between attraction sites and the fulfillment of tourism services. Occasionally, tour guiding has been carried out by locals who understand the history, culture and aspirations of a site. Tour guiding functions mostly incorporate the local community in the tourism value chain. Tour guides with basic and vocational training always find themselves serving in either hotels (Safari Lodges) or tour operators as drivers. Although training institutions are providing a curriculum for tour guides, on site the important employment criteria are communication capability and having done an apprenticeship on guiding. Merging of the roles of guide and driver ensure efficiency in human resources utilisation, especially for game drives. Information gaps exist on tour guide operations, their gender composition and educational levels.

3.8 Other supportive sectors

3.8.1 Member associations

Within the tourism sector in Uganda, all value actors have umbrella institutions that promote actors' interests while ensuring adherence to industry standards**.** Although membership of these organisations is voluntary, the government has made efforts to enforce membership. So, before a sector's value actors are licensed to operate, they are required to prove membership of the respective organisation representing the activity they would like to engage in. For example, before allocation of a license to operate as a travel agent, one is required to be a member of TUGATA. Membership of the Association of Uganda Tour Operators (AUTO) is open to those organisations whose primary activities are the planning, marketing and execution of package tours in Uganda. Umbrella associations for actors in the tourism sector include: Association of Uganda Tour Operators (AUTO); Board of Airlines Representatives in Uganda (BAR); Hotel and Catering Association of Uganda (HCAU); Uganda Association of Travel Agents (TUGATA); Uganda Association of Air Operators (UAAO); Uganda Association of Tourism Training Institutions (UAATI); Uganda Community Tourism Association (UCOTA); Uganda Safari Guide Association (USAGA); and Uganda District Tourism Associations (UDTA), which represents various upcountry locations.

3.8.2 Education institutions on tourism

A number of universities are currently offering tourism-related training. Makerere University Business School (MUBS) offers degrees in Leisure and Hospitality, Catering and Hotel Management, Hotel and Restaurant Business Management, and Travel and Tours Management. Diploma certificates are offered in Restaurant and Business Management, and Recreation and Events Management. Makerere University also provides tourism and wildlife resources management-related training at undergraduate and post-graduate levels. Other Ugandan universities preparing human resources for the tourism sector include Kyambogo, Kabale, Kampala International and Kampala University.

Public institutions established specifically to train personnel to serve the sector include the Hotel and Tourism Training Institute (HTTI), and the Uganda Wildlife Training Institute. Although the country's desire to protect wildlife as a tourism activity and for biodiversity conservation dates backs to 1926 (EPRC, 2011), the establishment of capacity building in the tourism sector is a recent intervention. The Uganda Wildlife Training Institute (UWTI) was established by a statutory Act (Chap. 139) of 1996. HTTI has been in operation for the last 25 years and although its graduates are expected to have contributed significantly to the tourism sectors, the extent of their inputs and participation is yet to be documented.

The total number of graduates from these institutions, the employment roles they are undertaking and the industry perceptions of their qualifications need to be established. It is also important to survey these training institutions and establish opportunities for improvements.

4 TOURISM TYPOLOGIES

The National Development Plan considers tourism attractions to fall into one of the following categories: eco-tourism; cultural heritage; faith-based; community development; and meetings, incentives conferences and events (MICE) (GoU, 2010). From the perspective of the broadest tourism typologies, the products in Uganda could be considered to be environmental adventure, cultural and business. Table 4 shows the tourism typologies in Uganda, their excursion activities and typical providers.

Table 4 Tourism typologies in Uganda

Tourism typologies	Excursion activities	Typical providers	Attraction area
Environmental adventure	National park, hiking, trekking, sport fishing, animal and bird watching.	Global incoming, local operators, excursion operators, local guides.	Mass tourism (game drives) e.g. MFNP, QENP, LMNP. Eco-tourism (primate tracking) e.g. BINP, MNP. Mountain visits (Ruwenzori and Mt. Elgon).
Cultural	Sightseeing, indigenous trips, and visits to museums, architecture and pilgrimage sites.	Global, incoming, local operators, excursion operators, museum guides, retail bazaars.	Cultural and religious sites (Kasubi tombs, Namugongo shrines. etc.).
Business	Sightseeing based, hotel based (conferences, games, etc.).	Luxury hotels to budget hotels, local excursion operators, local providers, vendors.	Large towns product markets, conference hosts.
Surf	Site-based water sports.	Global, incoming, local operators, excursion operators, local operators.	White water rafting, kayaking adventure and bungee jumping at Nile River, Jinja.

Source: GoU, 2010

Although most African countries that have been successful in attracting tourism (Kenya, Tanzania and South Africa) have adopted mass tourism in the protected areas, Uganda has taken a different approach. Both ecotourism and mass tourism have been adopted based on a sensitive approach to biodiversity. Restricted visiting is practised on primate tracking sites at both Bwindi Impenetrable and Mgahinga Gorrilla National Parks. The most significant values for the two parks are that they are afromontane forest regions, water catchment areas and habitat for the endangered mountain gorilla (Gorilla gorilla beringei) (UWA, 2003). Only 12 visitors are allowed per day at Bwindi, while six are allowed at Mgahinga. Despite the restrictive management option, the national parks continue to attract a large number of tourists and significant financial returns (UWA, 2010). At full capacity utilisation, the national annual economic impacts of Bwindi and Mgahinga combined were estimated at US$4.4 million from foreign exchange earnings, while sales effects, income and government revenue were estimated at US$8.8 million, US$3.9 million and US$2.7 million, respectively. Annual employment opportunities provided were estimated to be 946 posts (Moyini and Uwimbabazi, 2000). The same study also estimated annual benefits flowing to UWA and local communities as US$ 2.1 million and US$ 678,000, respectively, if full capacity was achieved.

Even parks attracting mass tourism in the country are sustainably utilized, as the industry is nature based (NEMA, 2004). Yet the activity is not devoid of negative environmental issues, as cases of severe deforestation, and biodiversity losses have been reported. Consequently, it has been recommended that any development should undertake a feasibility study, consider ecological preservation and have its environmental impacts monitored (Obua, 1997).

Tourism products are not sufficiently diversified in terms of both space (locations) and variety, and hence involve limited innovations. Potential for improved returns from tourism exists and stakeholders, especially the government, have initiated strategies to tap onto this opportunity (GoU, 2010). Challenges faced by the industry include natural barriers to entry which hinder resource use efficiency (Andersson, Croné and Stage, 2005) and which are not addressed by government intervention strategies (GoU, 2010). In areas such as Kibale National Park, tourists have raised their concern about the low standard of services and have proposed several changes that could improve tourism product utility (Obua, 1996). Incorporating such recommendations into the planning and management of the park is important and will add value to the tourism sector.

5. TARGETING LABOUR FORCE SOCIAL AND ECONOMIC UPGRADING

A Uganda urban labour force participation rate of 69.3 percent was observed, with men reporting 77.3 percent and women 61.9 percent (see Appendix). In every category, including by residence (Kampala and other urban areas) and educational levels (no formal schooling, primary, secondary, completed Senior 6, other specialisation and degree) men had higher labour participation than women. Tourism-based industries, including hotels and restaurants, and transport and communication, contributed 7.3 and 7.9 percent, respectively, of the working population. Female hotel and restaurant workers accounted for 12.4 percent, while those in transport made up 0.8 percent of the workforce. Men working in hotels and restaurants, and transport and communication, accounted for 3.8 and 12.8 percent, respectively, of the urban working population. Weekly actual working hours for hotels and restaurant were 70.1, with men and women recording 68.1 and 71.0 hours, respectively. Except for those employed in private households, workers employed in tourism-associated industries (hotels and transport) reported the highest weekly number of hours actually worked (UBOS, 2010b). The law stipulates a working duration of at most 56 hours a week (GoU, 2006), which implies that tourism sector employees work longer than the law stipulates. While the law requires that any hours worked above 48 hours should attract overtime payment, it is not known whether workers are compensated for the extra hours worked. The remuneration levels of tourism sector workers need to be established for different services and for personnel of different educational levels, gender and nationality. Comparing the tourism remuneration levels among functions, actors, nationality and with those of other sectors will provide a relative measure, as Uganda has no minimum wage law. The sector's welfare assessment could be carried out based on a basket of basic goods, along the lines of poverty studies measures (EPRC, 2011).

Membership of labour unions is low; this is despite the fact that enrolment is open to all workers and that the goal for association is to improve members' welfare. The unions promote and safeguard the interests of all registered members (e.g. social and economic benefits). Uganda Hospitality and Leisure Allied Workers Union, which caters for some workers in the tourism sector, has not been successful in attracting membership. Although there is a potential membership of 190,000, the union only has 200 enrolled members, including 87 women workers (NOTU, 2010). The Hotels, Food, Tourism and Allied Workers Union, which is supposed to represents the sector's workers, is also not doing well (Obot, 2011). Economic and social upgrading of the sector may require an understanding of the operations of the tourism-associated labour unions and the factors that influence the failure of workers to enrol with these labour movements.

Uganda is a signatory to most international conventions on labour, including those on i) abolition of forced labour; ii) minimum age of entry to employment, and elimination of the worst forms of child labour; iii) economic, social and cultural rights; iv) elimination of discrimination against women; and v) civil and political rights. The country has also enacted a number of labour-related bills, including the Employment Act; the Labour Union Act; the Occupational Safety and Health Act; and the Labour Disputes (Arbitration and Settlement) Act. The national constitution provides for the right of persons to work under satisfactory, safe and healthy conditions; to ensure equal pay for equal work without discrimination; and to ensure that every worker receives reasonable working hours and periods of holiday with pay, as well as remuneration for public holidays.

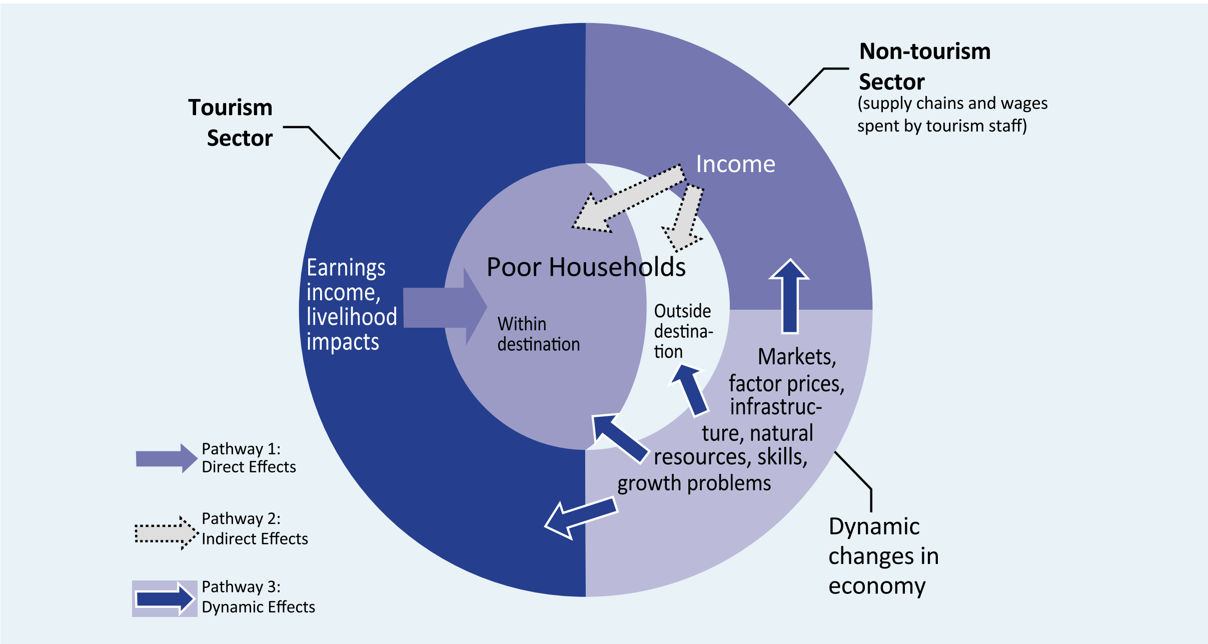
The Employment Policy (2009) addresses critical challenges facing the country, namely attainment of full employment coupled with decent work and equitable economic growth. In this document, employment creation is considered to be an effective route to poverty eradication. The main thrust of the policy, therefore, is generating sufficient productive jobs for Ugandans. While the policy and regulatory framework appears to be focused on improved welfare of workers in Uganda, there is a dearth of information on how far the tourism industry fulfils the stipulated labour requirement.

6. TOURISM AND POVERTY

The potential for tourism to accelerate economic growth and reduce poverty in many poor countries is gaining recognition. Yet the ability of tourism to reduce poverty will depend on the linkages between the tourism value chain and poor people in the community. Despite its potential for economic growth, improved livelihoods and socio-cultural development, all of which are critical for poverty alleviation, tourism is r a complex industry. It is driven by the private sector and often large international companies interested in profit maximisation. The adoption of technology as cost-reduction measures, mainly by outbound country firms, may lead to reduced socio-economic benefits for inbound countries. In addition, tourism can have negative impacts, such as environmental problems, cultural pollution and decline in behavioural standards, including prostitution, which may aggravate poverty in the country of destination (Luvanga and Shitundu, 2003).

Figure 2 shows different linkages between tourism and poverty that could be instrumental for poverty reduction with improved tourism development. Tourism is an important industry, which yields income for the country, profits for the actors and wages for employees. Tourism has the potential to reduce poverty directly, through employment provision, profits and trickle-down effects from other supplementary sectors. Indirectly, tourism improves livelihoods through dynamic changes in the economy, including access to infrastructure, markets and growth in skills that lead to development in other sectors which in turn contribute income to the economy.

Figure 2 Different types of linkage between tourism and the poor



Adapted from Mitchell & Ashley 2007

Development economists and policy makers are advocating pro-poor tourism. This refers to interventions that specifically focus on addressing poverty – they move beyond 'trickledown' theory and generate net benefits for the poor. Pro-poor tourism (PPT) is not a specific tourism product or sector, it is an overall approach designed to unlock opportunities for the poor (Jamieson *et al*. 2004)**.** In some economies, the priority of the tourism sector is more targeted on increased development of national indicators, including arrivals, bed occupancy, increased foreign exchange, improved balance of trade and increased national income. In an effort to ensure that the sector contributes to economic development, the government has set targets to raise the number of arrivals, and increase investment, employment provision and income (GoU, 2010). Yet specific conservation area and national parks management plans emphasise poverty reduction in the neighbourhood through resources and benefits sharing. Unlike in other countries, where chain analysis studies have been taken on Role of tourism on poverty reduction, e.g. Gambia (Mitchell and Faal, 2008), Tanzania (Luvanga and Shitundu, 2003), Zanzibar (Steck *et al.* 2010) and Mozambique (Jones & Ibrahimo, 2008)limited information is available on Uganda. Those that are available look at the aggregate national income against the country's poverty numbers (Bennett *et. al.,* 1999), which may not provide production global value chain-related interventions.

7. GLOBAL AND NATIONAL VALUE CHAIN VERTICAL AND HORIZONTAL INTEGRATION

Although vertical integration of functions along the local production value chain has been observed and discussed, levels of integration with the global chain have not been established. Literature is missing on levels of vertical integration among global and national actors in the tourism sector in Uganda. Cases of horizontal integration of functions among global and local value chain actors have been observed, e.g. the cases of Volcano Safaris, and Uganda Travel Bureau. Detailed research is required to establish the role that global actors play in influencing the sector. The type of tourism distribution channel observed in the country has implications for the absolute earnings of a country, level of leakages and intervention strategies for social or economic upgrading.

More information could be collected on the integration of functions among regional actors, especially now that the East African Community is tackling the issues of a common market. While no boundary has been observed with investors, as they have been observed to operate in either of the countries, little information is available on tourism investments. Already, Marasa Holdings has three hotels in Kenya (The Ark, Aberdare Country Club, and Mara Leisure Camp) and is running others in Uganda. Knowledge on how the tourism industry in either country benefits from operations on the other is important for upgrading the industry.

8. CHALLENGES FACING THE TOURISM INDUSTRY

The ministry and stakeholders in the sector have anticipated improved performance of the sector, but constraints and limitation have been observed. The major problems affecting the performance of tourism in Uganda, as highlighted in the NDP (GoU, 2010), include:

a) Perceived and actual insecurity in some parts of the country.
b) Inability of some tour operators, travel agents and accommodation facility providers to provide 'value for money'.
c) The current worldwide threat of terrorism and the consequent negative travel advice given by foreign missions.
d) The inability of the government to provide sufficient funds for sector development.
e) Failure of the communities to play a significant proactive role in protecting natural and cultural resources in Uganda. Nature adventure-based tourism in Uganda thrives on the conservation of wildlife and its habitat. Population pressure has led to higher levels of diversity loss and threatens the tourism industry.

9. RESEARCH AREAS IN TOURISM GNP FOR SOCIAL AND ECONOMIC UPGRADING

With the exception of routine data collections by statutory organisations (UWA, UBoS and the Migration Department), little research has been conducted on tourism in Uganda. The Migration Department collects information on individuals entering and exiting the country. Other information collected includes nationality of individuals visiting the country and duration of stay. The country has a number of entry/exit ports, including Entebbe International Airport and other border posts. The major border posts are located on the east (Malaba and Busia), south (Mutukula and Katuna), and west and north. Uganda's neighbours are Kenya, Tanzania, Rwanda, Democratic Republic of Congo and South Sudan on the east, south, south-west, west and north, respectively. UWA collects information on those entering the parks. Information collected by UWA includes data on nationality and duration of stay. UBoS assembles information from various government institutions and produces an annual report on the various economic activities taking place in the country. Periodically, UBoS collects specific information to fill existing gaps. For example, UBoS has recently been involved in sampling hotels for information on capacity. Review of information and in-depth analysis of information available from UBoS is important for understanding the tourism sector in Uganda. There is a need therefore to establish what information is available from UBoS, either published or unpublished, the methodology of data collection and existing opportunities for more information from UBoS' collaborators. The available information should be analysed, taking into consideration the GNP and the need for social and economic upgrading/downgrading.

A detailed study is required to understand the tourism sector in Uganda. Some of the research areas that could be prioritised for study include:

i) Factors that influence tourists visiting Uganda. Although yet to be verified, there has been concern that most tourists visiting Uganda are either in transit to/from other tourism destinations or have entered the country for other reasons, including visiting family members or friends, or attending other activities, such as conferences, religious activities or businesses. Marketing of the country and tourism typologies will be improved by understanding the factors attracting tourists to Uganda. Information derived from such a study would aid in formulating options for social and economic upgrading/downgrading.

ii) Review of tourism's labour requirements and working environment. Appraisal of activities related to labour issues will be evaluated. Issues to be addressed may include: jobs allocation by categories, nationality, gender, education levels, age, and regional/ethnic backgrounds; and working conditions for employees in different job positions, including remuneration, working hours, engagement with labour organisations, discrimination, availability and types of duty leave, health and accident insurance, provision of social amenities, etc. The survey to collect information on labour issues would sample tourism value chain actors.

iii) Effects of information technology on tourism. The adoption of information technology (IT) innovation has influenced the operations and returns of firms globally. There is a dearth of information on adoption levels of IT in Uganda and the effects of its adoption on firms involved in tourism.

iv) Levels of functional integration among tourism actors in Uganda. Although cases of vertical and horizontal integration of functions in the tourism global network have been quoted, more verification of the industry's integration levels is required. Integration should be considered both within and outside Uganda, including functional integration with firms based in other African countries (Kenya, Rwanda, Tanzania and South Africa) and the outbound countries. This study would necessitate primary data collection among tourism value chain actors in Uganda.

v) Impacts of tourism on employment and poverty reduction. Although tourism has been recognised as a major contributor to the country's GDP (GoU, 2010), levels of employment provision and welfare contribution to the local community need to be established. It is also important to understand how tourism contributes to other industries, including agriculture, other services sector (e.g. insurance), manufacturing, etc.

vi) Available options for tourism value addition in Uganda. Although the country has allocated a great deal of land for wildlife protection, with the aim of earning from tourism (GoU, 2010), returns per unit area remain low (EPRC, 2011). The government has continued to subsidise the tourism sector by financing the operations of UWA. Any intervention that would increase utilisation and returns from the infrastructure already allocated for game estate is important.

vi) Determination of trajectory for social and economic upgrading/downgrading for tourism actors in Uganda.

vii) Inter-regional tourism activities. While migration data indicate the existence of transboundary tourism between Uganda and its neighbours, especially Kenya and Rwanda (UBoS 2010a), little information is available on factors influencing such activities. Kenya, Uganda, Tanzania and Rwanda are members of the East Africa Community, which is considering political and monetary union. Ugandan competitiveness within the regional block needs to be established, especially considering the similarity of the tourism products. Uganda tourism typologies include game drives, which are popular in Kenya and Tanzania, and primate tracking, which is a major attraction in Rwanda. Although its success compared with Rwanda is undocumented, its performance in game drives lags behind that of Kenya and Tanzania.

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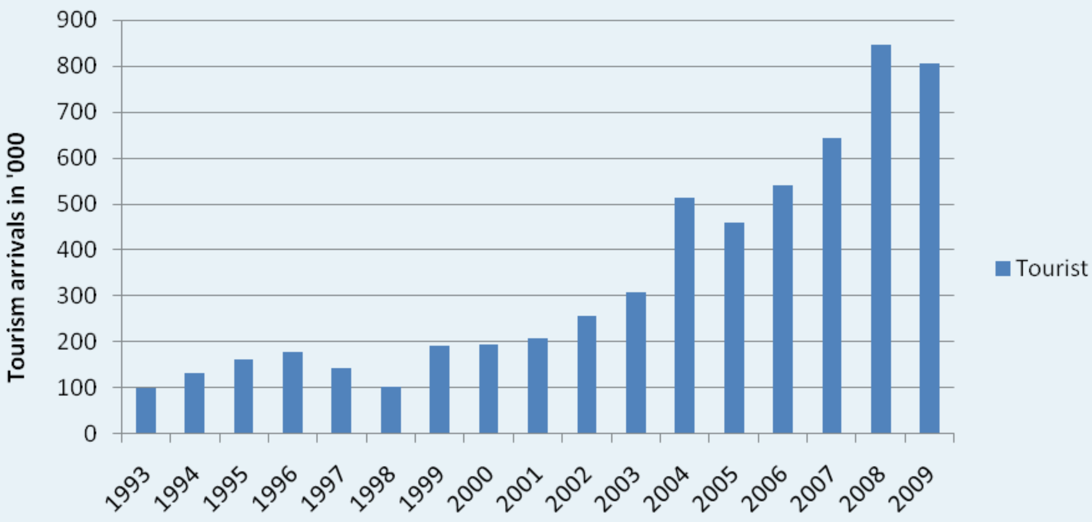
APPENDICES

Appendix 1. Total tourist arrivals in Uganda, 1993-2009



Source: UBOS, 2010a

Appendix 2. Ugandan citizens and foreign tourists that visited the National Parks in 2009

National Park	Foreigners		Ugandan	
	Non- resident	Residents	Citizen	Total
Murchison Falls NP	17,523	4,563	17,151	39,237
Queen Elizabeth NP	16,415	4,018	42,080	62,513
Kidepo Valley NP	535	835	1,554	2,924
Lake Mburo NP	6,052	1,801	9,668	17,521
Ruwenzori Mountain NP	527	195	559	1,281
Bwindi Impenetrable NP	11,097	108	601	11,806
Mgahinga Gorilla NP	1,112	131	643	1,886
Semliki NP	648	598	1,455	2,701
Kibale NP	6,214	305	481	7,799
Mount Elgon NP	804	246	1,894	3,708
Katonga NP	14	15	419	448
Semuliki WR	249	351	159	759
Total	61,190	13,166	77,462	151,818

Source: UBOS, 2010a

Appendix 3. Tour operators in Uganda, 2010

1	A1 Travel Ltd	83	Great Value Safaris Ltd
2	AA Safaris & Tours Ltd	84	Gulf Safaris Ltd
3	Able Safaris Ltd	85	Hamlet Birding Tours & Safaris
4	Acacia Safaris Ltd	86	Hertz Rent A Car
5	Access Uganda Tours Ltd	87	Hog Safaris Ltd
6	Adrift Adventure Co. Ltd	88	Impala Car Hire Services
7	Afri Tours & Travel Ltd	89	Impala Safaris
8	Africa Expedition Safaris Ltd	90	Intercontinental Travel Services
9	Africa Runners Co Ltd	91	Interline Tours & Travel Ltd
10	Africa Travel Ltd	92	Into Africa Safaris Ltd
11	Africa's Great Exploration Safaris (AGE)	93	Jes International Travel Consultant
12	African Jungle Safaris Ltd	94	Jet Tours & Travel Ltd
13	African Pride Tours & Travels	95	Jillex Tours &Travel
14	African White Rhinos Safaris Ltd	96	Jumbo Travel & Tours Ltd
15	Almanda Travel & shipping Agency Ltd	97	Just Travel Uganda
16	Almmader Marine Tours and Travel Services Ltd	98	K.A Tours & Travel
17	Alpha & Omega Tours & Travel Company Ltd	99	Karibu Travel Services
18	Ariba Tours & Travel Ltd	100	Klean Services Safaris & Car Hire
19	Asante Travel Care	101	Ku Tunza Travel (Ug) Ltd
20	Atlas Travel Centre Ltd (Atlas Safaris)	102	King Air Tours & Travel
21	Abex Safari's & Tours	103	Lake Kitandara Tours & Travel Ltd
22	Advanced Tours & Travel	104	Let's Go Travel
23	Africa 1 Travel	105	Luks Tours and Travel
24	African Pearl Safaris	106	Magrib Tours & Travel
25	Africana Tours & Travel	107	Majestic Safaris Ltd
26	Air masters Travel Ltd	108	Maranatha Tours & Travel Ltd
27	AJ Safaris	109	Matoke Tours Ltd
28	Albright Tours & Travel Ltd	110	Midas Touch Travel Services Ltd
29	Almasoud Investments	111	Masai Tour & Travel Ltd
30	Amazing Tours & Travel	112	Metropolitan Travel Bureau Ltd
31	Ark Flight Tours &Travel	113	Multiswift International Travel Centre
32	Arrow Safaris	114	Nalubale Rafting
33	Asyanut Tours & Travel	115	Nature Link Safaris
34	Avian Watch Uganda	116	Netspan Tours & Travel
35	B & B Car Rentals	117	Nile Safaris
36	Barloworld Logistics Tours & Travel	118	Nile River Explorers
37	Betsam travel Bureau	119	Panari Safaris Ltd
38	Beyond the Sky Tours & Travel Bureau	120	Pearl of Africa Tous & Travel Ltd
39	Blessed Safaris	121	Platinum Tours & Travel
40	Blessing Tours & Travel Company	122	Pearl of Africa Tours & Travel
41	Breeze Travel & Safaris Ltd	123	Pinnacle Africa Safaris
42	Brovad Tours & Travel Ltd	124	Regional Travel Bureau Co. Ltd
43	BS Travel and Tours	125	Royal Travel Agency of Scotland
44	Belex Tours	126	Royal Venture Tour & Travel Agency Ltd
45	Bunyonyi Safaris Ltd	127	Royal World Tours & Travel Ltd
46	Chattel Investment Ltd	128	Safari Centre (U) Ltd
47	Chiba Tours & Travel Ltd	129	Samaritan Tours & Travel Ltd
48	Chico Travel Bureau Ltd	130	Sana Travels
49	Churchill Safaris & Travel	131	Satguru Travel & Tours Services Ltd
50	City Cars Ltd	132	Shammah Tours & Travel Ltd
51	Classic Africa Safaris	133	Shumuk Tours & Travel
52	Compassion Tours & Travels Ltd	134	Sky Travel Ltd

53	Concord Express Travel Ltd	135	Speedwing Travel Centre
54	Concord International Travel Bureau Ltd	136	Ssesse Palm Beach Resort
55	Connectline Tours & Travel Co. Ltd	137	Sterling Travel & Tours Services (U)
56	Crested Crane Tours & Travel	138	Sunny Safaris Ltd
57	Crested safaris Tours & Travel	139	Safari Eye
58	Car Rentals Africa Ltd	140	Sites Travel
59	Chauffeur Spot	141	Sky Stars Tours & Travel
60	Coastline Freight Tours & Travel	142	Sunlink Tours & Travel
61	Country Safaris	143	Sunset Tours and Travel
62	Destination Jungle	144	Swanair Travel
63	Discovery Tours & Travel	145	Tangaza Tours
64	Dove Tours & Travel Ltd	146	The Far Horizon
65	Davide & Francesco E. African	147	The Uganda Safari Company
66	Diplomat Travel Bureau	148	Tourist Centre
67	Escape Tours & Safaris	149	Travel Dot Com
68	Ever Based Tours & Travel Ltd	150	Travelog
69	East African Explorers Safaris	151	Trinita Safaris Ltd
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80	Globetrotters Travel & Tours Ltd	163	World Ventures Ltd
81	Gorilla Tours Ltd	164	World Tutor Travel
82	Great Safari Places		

Source: Uganda Tourism Board, (2011) *Names and Locations of the Tour Operators and Travel Agents in Uganda in 2010. Unpublished Information. UTB, Kampala, Uganda.*

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