



UGANDA BUREAU  
OF STATISTICS



MINISTRY OF TOURISM,  
WILDLIFE AND ANTIQUITIES



United Nations  
Economic Commission  
for Africa



# UGANDA TOURISM **SATELLITE ACCOUNT**

MEASURING THE CONTRIBUTION OF  
TOURISM TO THE ECONOMY OF UGANDA

POPULAR VERSION 2023

# INTRODUCTION

In 2019, the average Ugandan took 3 day trips and spent 5 nights away from home on domestic trips. As a nation we welcomed more than 1.5 million non-resident visitors during the year. 297,380 Ugandan residents travelled out of Uganda for a foreign travel and stayed an average of 4.4 nights. Collectively, spend by domestic tourists and international visitors was UGX 7,996.92 billion (USD2.2bn). The Tourism Satellite Account helps the Tourism industry and government track growth and support strategies for a stronger and more sustainable tourism industry

The Tourism Satellite Account (TSA) is an accounting framework designed to measure goods and services associated with tourism according to international standards, concepts, classifications and definitions. The purpose of a Tourism Satellite Account is to analyse in detail all the aspects of demand for goods and services associated with the activity of visitors along with the operational interface with the supply of such goods and services within the economy; to describe how this supply interacts with other economic activities. The TSA is compiled following the Tourism Satellite Account: Recommended Methodological Framework 2008 (TSA:RMF 2008).

## Why do we have a Tourism Satellite Account?

Tourism cuts across many different industry sectors and cannot be measured in the same way as other parts of the economy. Using an internationally accepted methodology developed by the World Tourism Organization (UNWTO), a national Tourism Satellite Account (TSA) has been developed for Uganda to estimate the impact of tourism on the Ugandan economy.

## Headline Results

In 2019, total tourist consumption was UGX 7,996.92 billion (USD2.2bn), which resulted in:

- The Direct Contribution of Tourism to GDP was UGX 5,093 billion (USD 1.37bn), 3.64% of total GDP in 2019
- In 2019, Tourism directly supported 1,559,147 jobs (14.7% of total employment)
- 2 in 10 Ugandans are employed in Tourism
- Visitor Exports generated UGX 4,580.4 billion (USD 1.24bn), 20 percent of total exports in 2019 and 59% of Service Exports
- Imports of UGX 1,666.28 billion (USD0.45bn) from Ugandan residents travelling overseas.
- UGX 2.9 trillion (USD786.6bn) surplus in Tourism trade balance (inbound tourism net export)
- International Visitors spent 10 times more per day than Domestic Visitors
- Tourism is helping to reduce the Trade Deficit
- Tourism is an industry with high self employed and female employment
- Tourism is an industry with a large informal sector
- Two thirds of tourism jobs are in food and beverage serving services
- Tourism contributes significantly to taxes. The direct contribution of tourism to taxes in 2019 was UGX 264.2 billion (USD71mn), 2.63% of total taxes Tourism investment in 2019 was UGX Ugx 6.4 trillion, 19.0% of total investment (USD1.74bn)

There three main forms of Tourism Namely Inbound Tourism, Domestic Tourism and Outbound Tourism

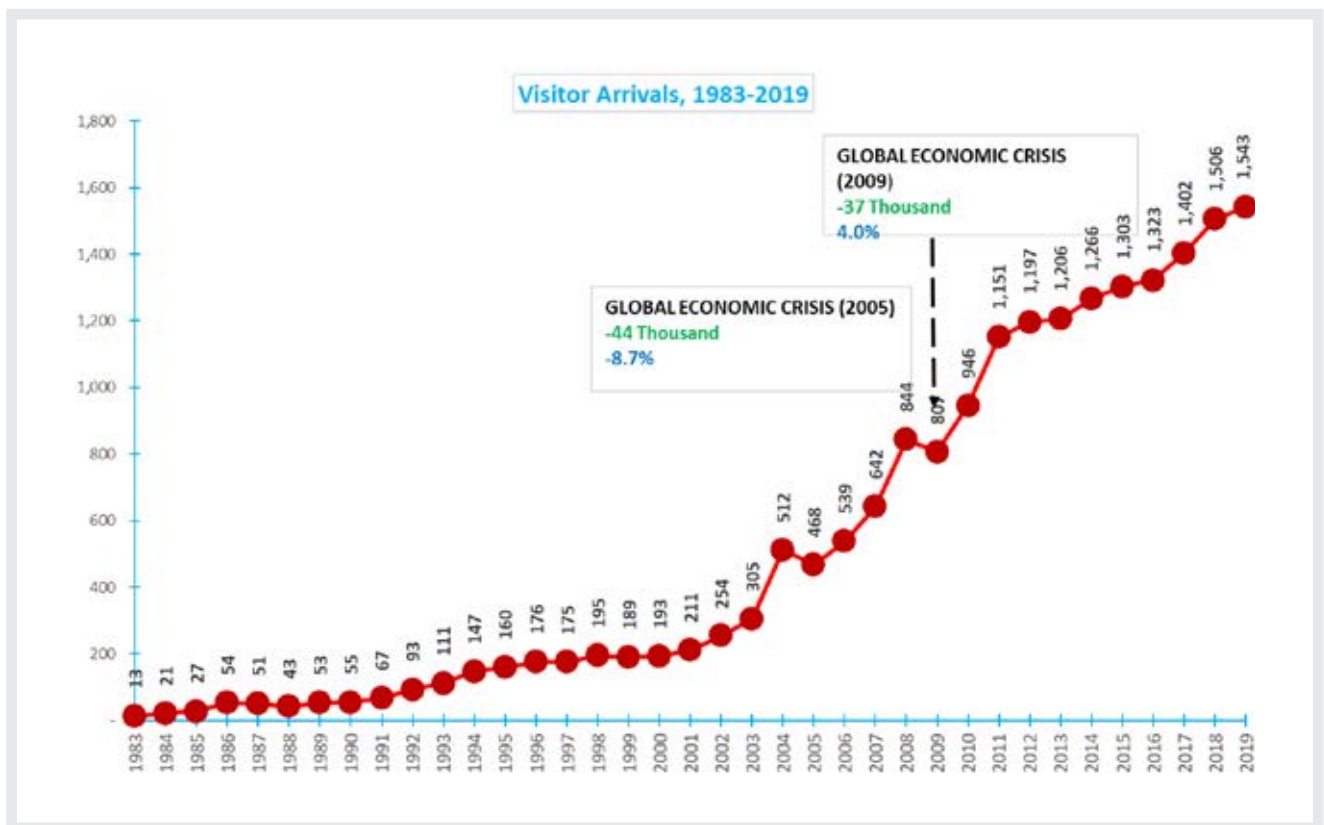
# INBOUND TOURISM

Inbound Tourism refers to tourism of non-resident visitors (foreign visitors and nationals permanently residing abroad) within the economic territory of Uganda. Visitors comprise of Excursionists and Tourists.

## 1.543 million visitors arrived in Uganda in 2019 and stayed for an average of 8.3 days

A total of 1,542,620 inbound visitors were recorded in the year 2019 (2018: 1,505,669), a 2,4 percent increase from 2018. Out of these 73,744 were excursionists/same day visitors while 1,468,876 were Tourists/overnight visitors.

Exhibit 1: Visitor Arrivals, 1983-2019



Inbound Tourists' average length of stay in 2019 was 8.3 nights. Leisure visitors stayed longer than all visitor types. Leisure & Holiday visitors, on average spent 7.6 nights, Business visitors stay for on average 3 nights while VFR visitors stay for almost a week (6.4 nights).

### Inbound Tourism Expenditure (Visitor Exports/Forex Earnings)

Inbound tourism expenditure is the tourism expenditure of a non-resident visitor within Uganda.

### Visitor Exports/Forex Earnings stood at UGX 4,580.4 Billion (USD 1.24 Bn) in 2019

Inbound Tourism Expenditure amounted to UGX 4,580.4 Bn (USD 1.24 Bn) in 2019. The three main products in Inbound Tourism Expenditure were Accommodation, Food and Beverage and Passenger transport with a combined share of 75.2 percent in 2019. This means 75.2 cents of every dollar/shilling by inbound visitors is spent on Accommodation, Food and Transport.

### Main Components of Inbound Tourism Expenditure



# DOMESTIC TOURISM

Domestic tourism refers to tourism of resident visitors within the economic territory of Uganda.

A total of 2,420,927 domestic visitors were recorded in 2019 majority (52.2 percent ) being same day visitors and 47.8 percent as overnight visitors

- Domestic trips- A total of 21,490,958 domestic trips were recorded; same day visitors made about 3 trips and the Overnight visitors made 2 trips on average every three months.
- Length of stay- on average, the domestic tourists stayed 5.1 nights.
- The main purpose of visit for Domestic Visitors was to Visit Friends and Relatives (VFR) followed by Spiritual and Religious related visits.

## Domestic Tourism Expenditure

Domestic tourism refers to tourism of resident visitors within the economic territory of Uganda.

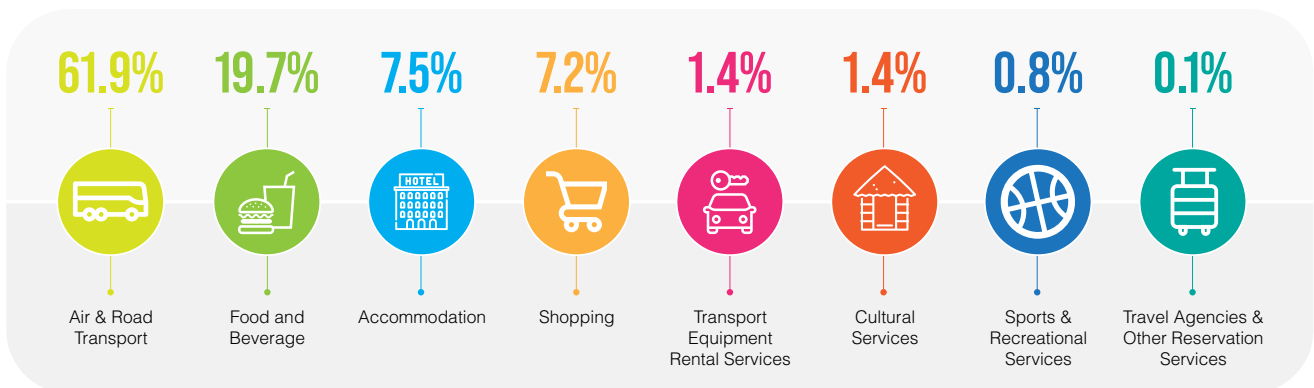
## Tourism Receipts/earnings from Domestic Visitors amounted to UGX 2,965.9 Billion (USD 0.8 Bn) in 2019

Domestic Tourism Expenditure recorded UGX 2,965.9 billion (USD 0.8 Bn) in 2019. Among domestic travellers, 14% of expenditure was from day trips (UGX 416.6 bn) and 86% from overnight trips (UGX 2,549.3 bn).

## 96.3 cents of every dollar/shilling went on Transport, Accommodation, Food and shopping

The four main tourism products domestic tourists spend on are Passenger Transport, Food and Beverage, Accommodation and Shopping with a combined share of 96.3 percent in 2019.

### Main Components of Domestic Tourism Expenditure



# OUTBOUND TOURISM

Outbound tourism expenditure refers to spending of Ugandan visitors while travelling outside the country.

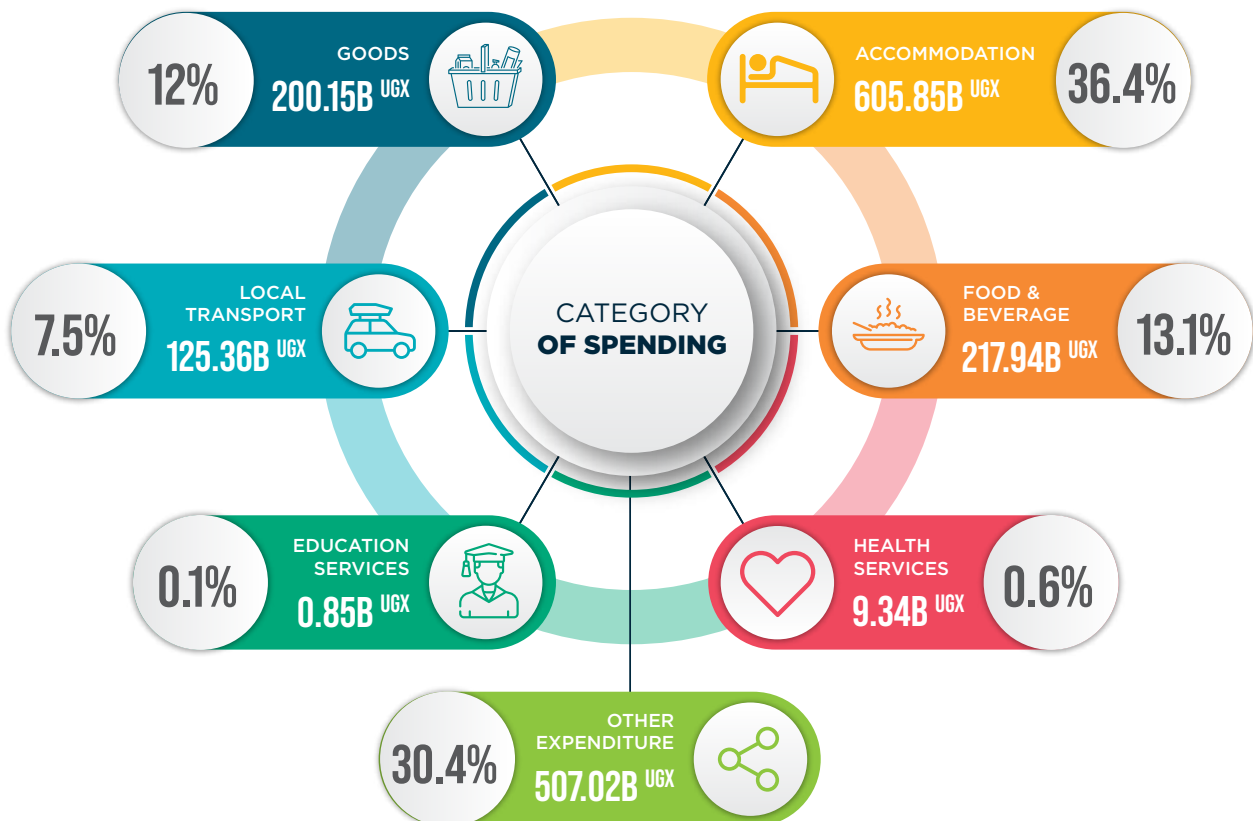
In 2019, 297,380 outbound visitors were recorded. Residents majorly went for a Foreign Travel for business related purposes (49 percent) and personal visits (47 percent). The average length of stay by Ugandan tourists abroad was 4.4 nights.

## Outbound Tourism Expenditure (Tourism Imports)

**Uganda Residents spent UGX 1,666.28 billion (USD0.45bn) on Foreign Travel in 2019**

The Tourism Imports/Resident Spending on Foreign Travel stood at UGX 1,666.28 billion in 2019. The three main products in Outbound Tourism Expenditure were Accommodation, Food and Beverage and purchase of goods with a combined share of 61.5 percent in 2019.

## Main Components of Domestic Tourism Expenditure





# TOURISM TRADE BALANCE

## TOURISM IS HELPING TO REDUCE THE TRADE DEFICIT

The aggregate expenditure by international visitors adds to Uganda's Tourism Export earnings, and totaled UGX 4,580.4Bn in 2019, and makes tourism one of our largest service exports – **accounting for 20.0% of all Ugandan exports for the year 2019.**

Aside from exports, there is an import aspect to tourism as well, which is measured by the expenditure of Ugandans travelling abroad. In 2019, the figure for outbound tourism amounted to UGX 1,666.28 billion.

Therefore, in 2019, the value of tourism exports exceeded the value of the imports resulting into a surplus Tourism trade balance with the rest of the world (inbound tourism net export) estimated at UGX 2.9 trillion (USD786.6bn) surplus as compared to UGX 13.4 trillion deficit registered for the total economy in the same year. This results in a declining trade deficit due to the impact of Tourism.

Exhibit 2: Tourism trade balance in 2019

|                                     | Imports (**)      |                          | Exports (**)      |                          | Net Exports (**)   |                          |
|-------------------------------------|-------------------|--------------------------|-------------------|--------------------------|--------------------|--------------------------|
|                                     | Total Output      | Tourism Share (In Value) | Total Output      | Tourism Share (In Value) | Total Output       | Tourism Share (In Value) |
| Tourism specific products           | 1,473,506         | 949,019                  | 189,397           | 4,028,140                | -1,284,109         | 3,061,896                |
| Othe non-consumption products (***) | 34,807,279        | 717,261                  | 22,670,706        | 552,259                  | -12,136,573        | -165,002                 |
| <b>Total Output</b>                 | <b>36,280,785</b> | <b>1,666,281</b>         | <b>22,860,103</b> | <b>4,580,399</b>         | <b>-13,420,683</b> | <b>2,914,119</b>         |

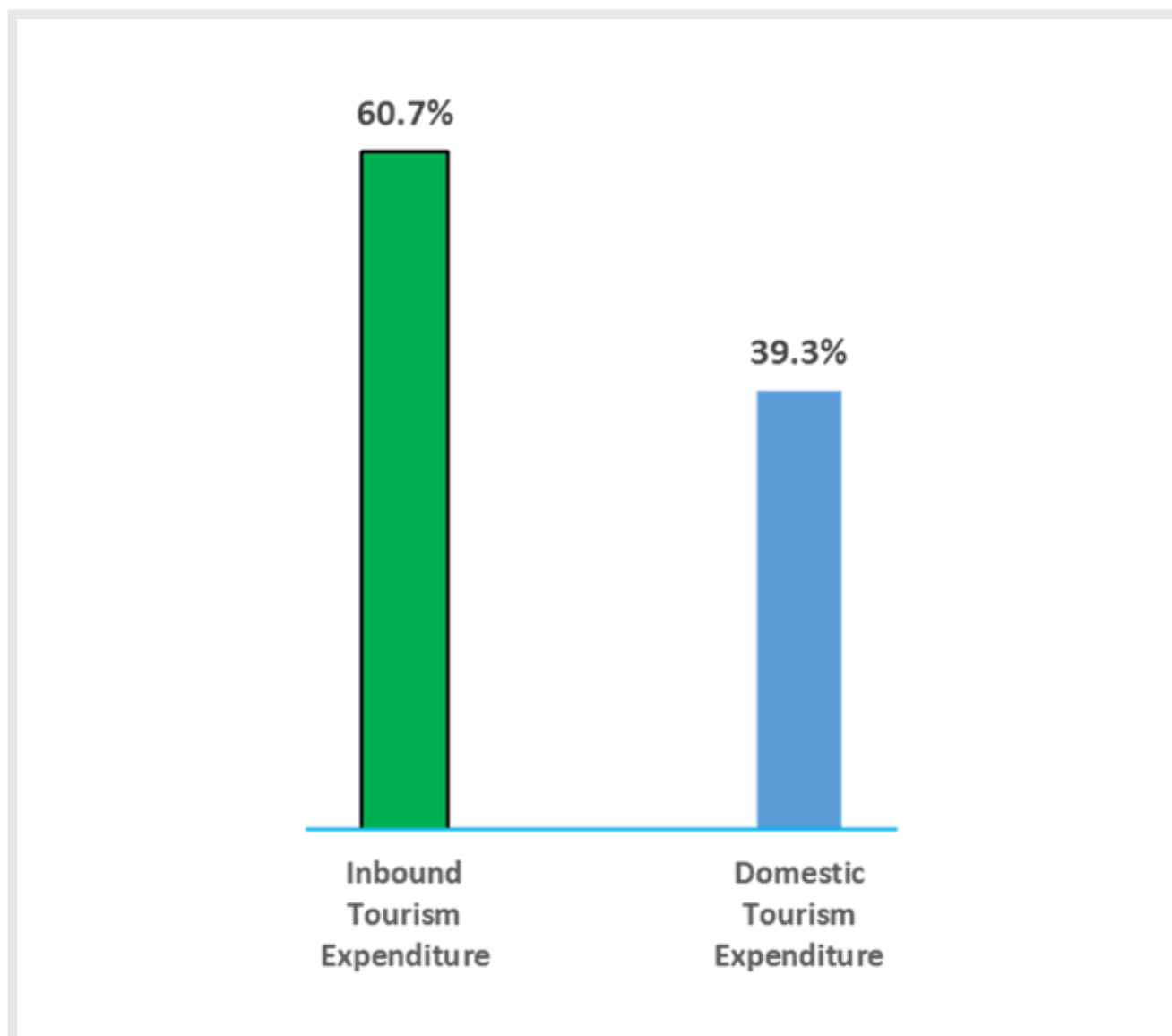
## INTERNAL TOURISM EXPENDITURE

Internal tourism refers to the combined inbound tourism and domestic tourism in 2019. Total internal Tourism Expenditure amounted to UGX 7,546.27 billion in 2019.

**Inbound Tourism dominated internal tourism expenditure with 60.7 percent in 2019 showing its role in contributing to Tourism Performance**

Expenditure from domestic tourism accounted for 39.3 percent of the total internal tourism spending

Exhibit 3: Internal Tourism Expenditure



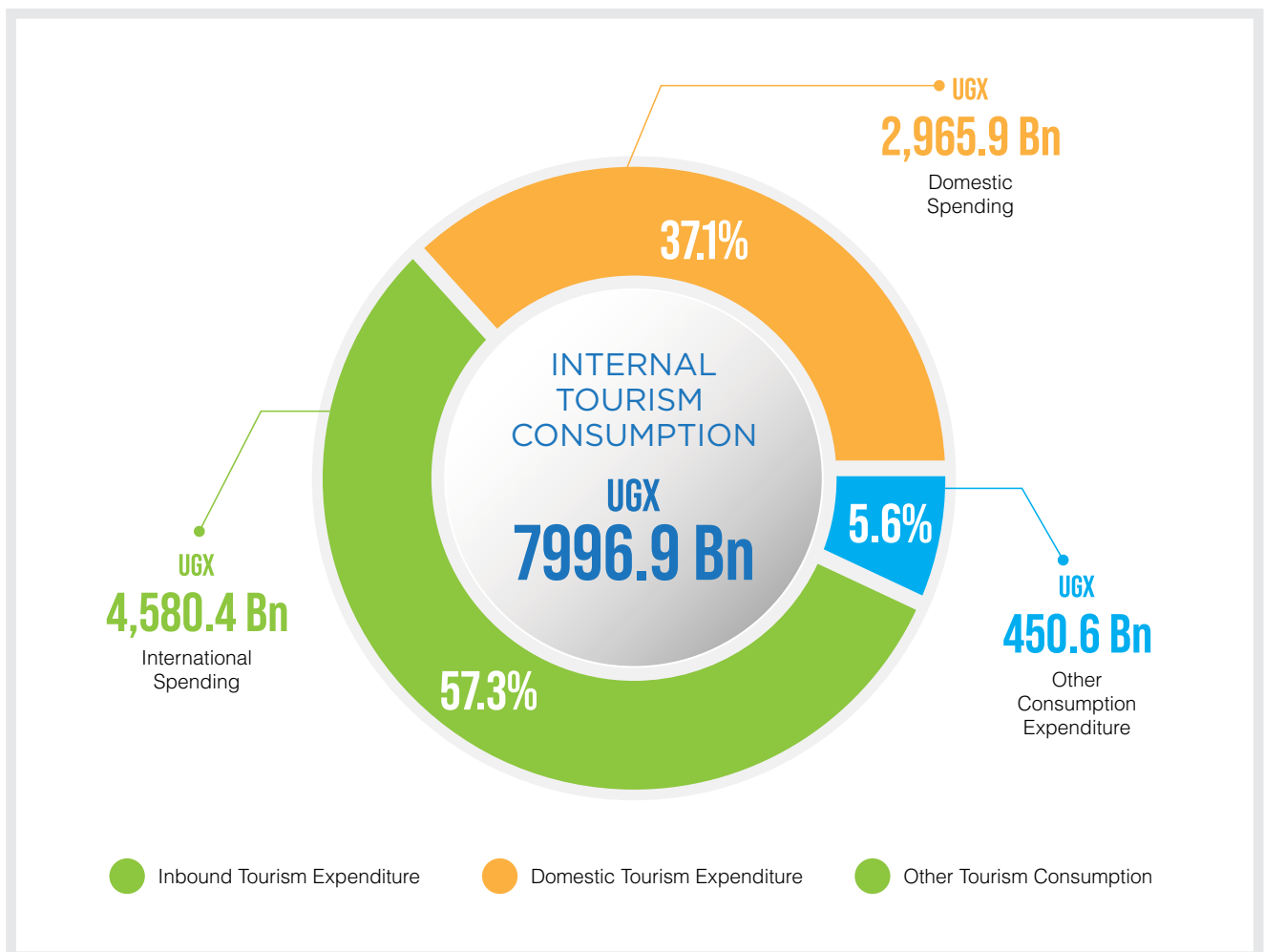


# INTERNAL TOURISM CONSUMPTION

Total Tourism receipts/earnings stood at UGX 7,996.9 billion (USD2.2bn) in 2019

Internal Tourism Consumption comprises inbound tourism expenditure and domestic tourism expenditure plus other consumption expenditures. A total of UGX 7,996.92 billion of internal tourism consumption was generated in 2019. Domestic Tourism showed its significant role in generating tourism performance in Uganda by contributing 37.1 percent to internal tourism consumption while Inbound tourism recorded 57.3 percent. This implies that in 2019, a total of UGX 7,996.92 billion were generated in total Tourism receipts.

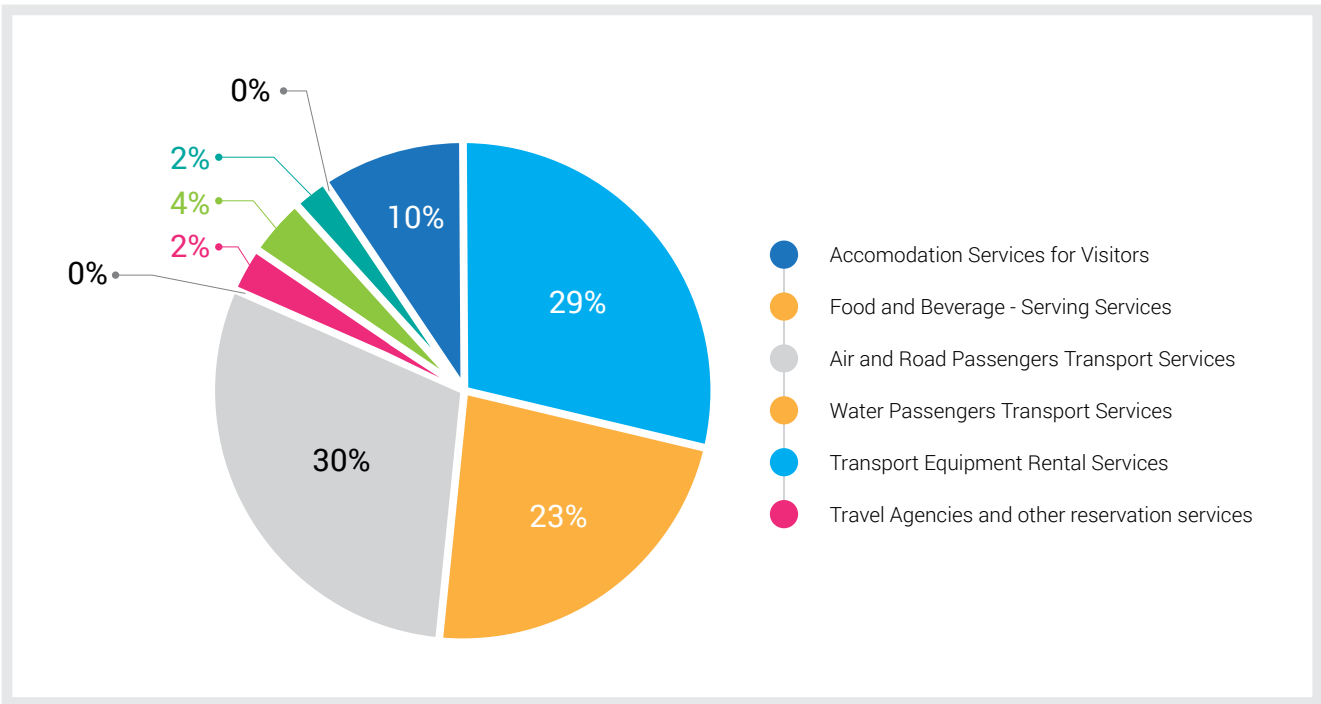
Exhibit 4: Internal Tourism Consumption



### 82 cents of every dollar/shilling went on Transport, Accommodation and Food and

In 2019, the main item of expenditure among tourists (Inbound and Domestic) was Passenger transport within Uganda. Total expenditure on Transport was UGX 2,411.5 billion—equal to **30 cents out of every dollar/shilling spent by international and domestic tourists**. With expenditure of UGX 2,290.5 billion for the year 2019, Accommodation for visitors accounted for **29 cents every dollar/shilling**, while total Food and Beverage of UGX 1,838.6 billion represented another 23 cents.

Contribution of key tourism products to total visitor consumption expenditure, 2019



### INTERNATIONAL VISITORS SPENT 10 TIMES MORE PER DAY THAN DOMESTIC VISITORS

International visitors spent an average of UGX 411,200 per day in 2019. Consumption of domestic tourists was UGX 40,239 per day. Due to costs of accommodation, expenditure by domestic visitors varies substantially between day trips and overnight trips—average spend per overnight trip was UGX 51,304 in 2019 compared to UGX 30,121 per average day trip.

### ... AND THEY SPENT IT DIFFERENTLY

For every shilling spent by international tourists, 39 cents is spent on Accommodation, 24 cents on Food and Beverage, 13 cents on Passenger Transport and 12 cents on country specific items.

Among domestic visitors, the main items of expenditure in 2019 were passenger transport (61.9%), Food and Beverage (19.7%), Accommodation 7.5 percent) and Shopping (7.2 percent).

# GROSS VALUE ADDED OF TOURISM INDUSTRIES (GVATI)

## Gross value Added of Tourism Industries (GVATI) amounted to UGX 4.4 trillion in 2019

The GVATI is the sum of all gross value added (GVA) of establishments that are considered tourism industries, regardless of whether they serve tourists or not. In 2019, Gross value Added of Tourism Industries (GVATI) amounted to UGX 4.4 trillion which was adjusted for value added from other non-tourism industries to generate Tourism direct gross value added (TDGVA) which was estimated at UGX 4.8 trillion. Accommodation, passenger Transport and Food and beverage were the major contributors to the Tourism industry.

### Main Components of GVATI



## TOURISM GROSS VALUE ADDED

Tourism Value Added is the value of goods and services produced by tourism establishments less the cost of producing these goods and services

### Tourism contribution to GVA was estimated at 3.7 percent (UGX 4,829.0 Bn)

Accommodation facilities for visitors were the largest contributors to gross value added in 2019 accounting for 31.8% or UGX 1,533.8 billion. The share of Food and beverage services GVA attributed to the tourism sector was estimated at 57.3 percent translating into 21.3 percentage contribution to tourism GVA. The share of Air and Road passenger transport services GVA attributed to the tourism sector was estimated at 85.1 percent translating into 30.7 percentage contribution to tourism GVA. The share of Cultural services GVA attributed to the tourism sector was estimated at 97.1 percent translating into 3.1 percentage contribution to tourism GVA.

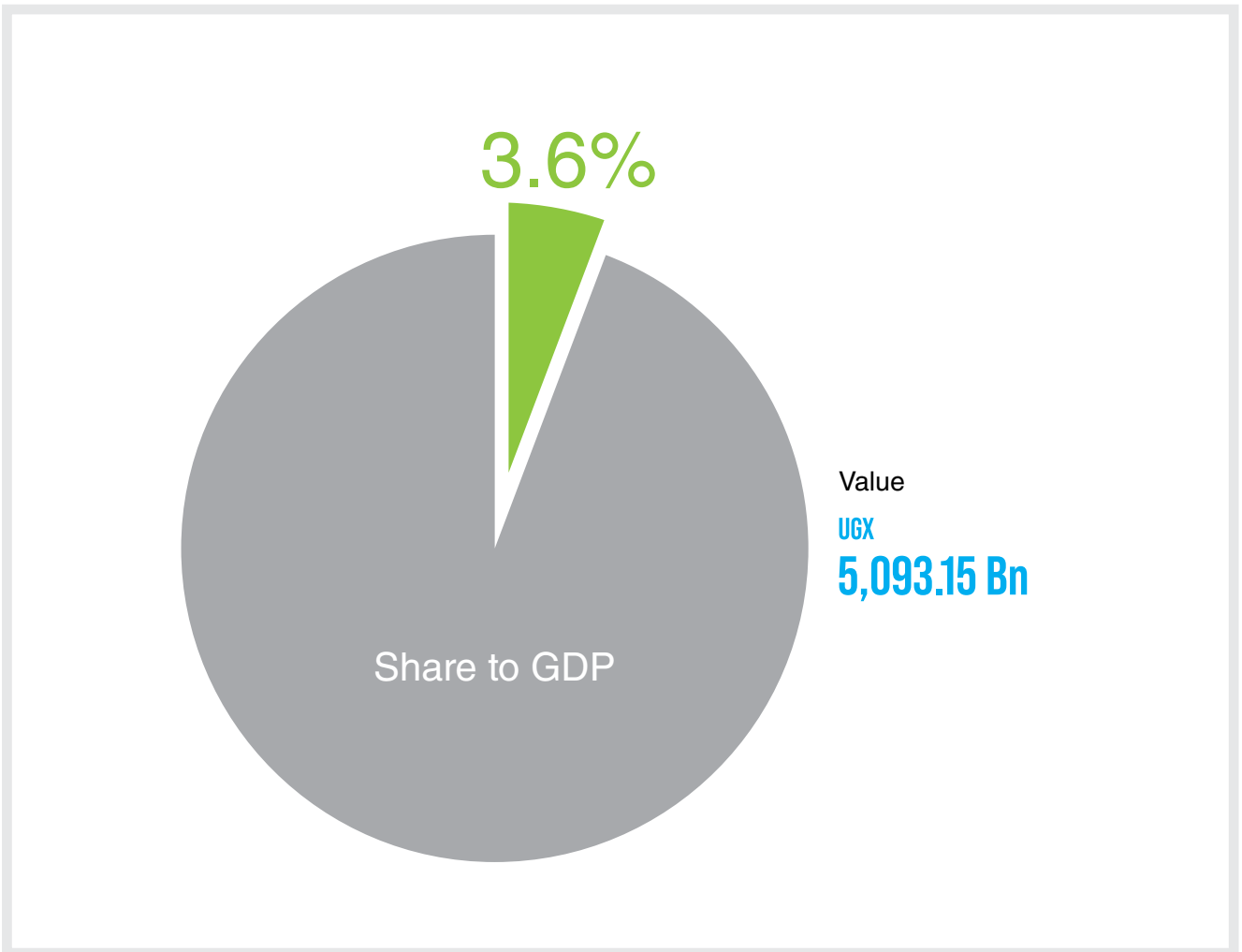
#### Exhibit 5: Tourism Contribution to Gross Value added

| Industries                                     | Total economy GVA | Tourism share  | Tourism percentage share | Percentage contribution to total GVA |
|--|-------------------|----------------|--------------------------|--------------------------------------|
| Accommodation services for visitors            | 2,105.6           | 1,533.8        | 72.8                     | 31.8                                 |
| Food and beverage services                     | 1,797.8           | 1,030.2        | 57.3                     | 21.3                                 |
| Air and Road passenger transport services      | 1,741.0           | 1,481.7        | 85.1                     | 30.7                                 |
| Water passenger transport services             | 14.6              | 8.6            | 58.8                     | 0.2                                  |
| Transport equipment rental services            | 40.6              | 23.5           | 57.9                     | 0.5                                  |
| Travel agencies and other reservation services | 111.1             | 65.7           | 59.2                     | 1.4                                  |
| Cultural services                              | 155.4             | 150.9          | 97.1                     | 3.1                                  |
| Sports and recreational services               | 113.2             | 62.6           | 55.3                     | 1.3                                  |
| Other consumption products                     | 153.9             | 9.7            | 6.3                      | 0.2                                  |
| Other non tourism products                     | 123,628.4         | 462.3          | 0.4                      | 9.6                                  |
| <b>Total GVA</b>                               | <b>129,861.6</b>  | <b>4,829.0</b> | <b>3.7</b>               | <b>100.0</b>                         |

# TOURISM DIRECT GROSS PRODUCT (TDGDP)

Uganda's Tourism Industry directly contributed UGX 5.1 trillion to GDP—Equivalent to 3.64% of GDP

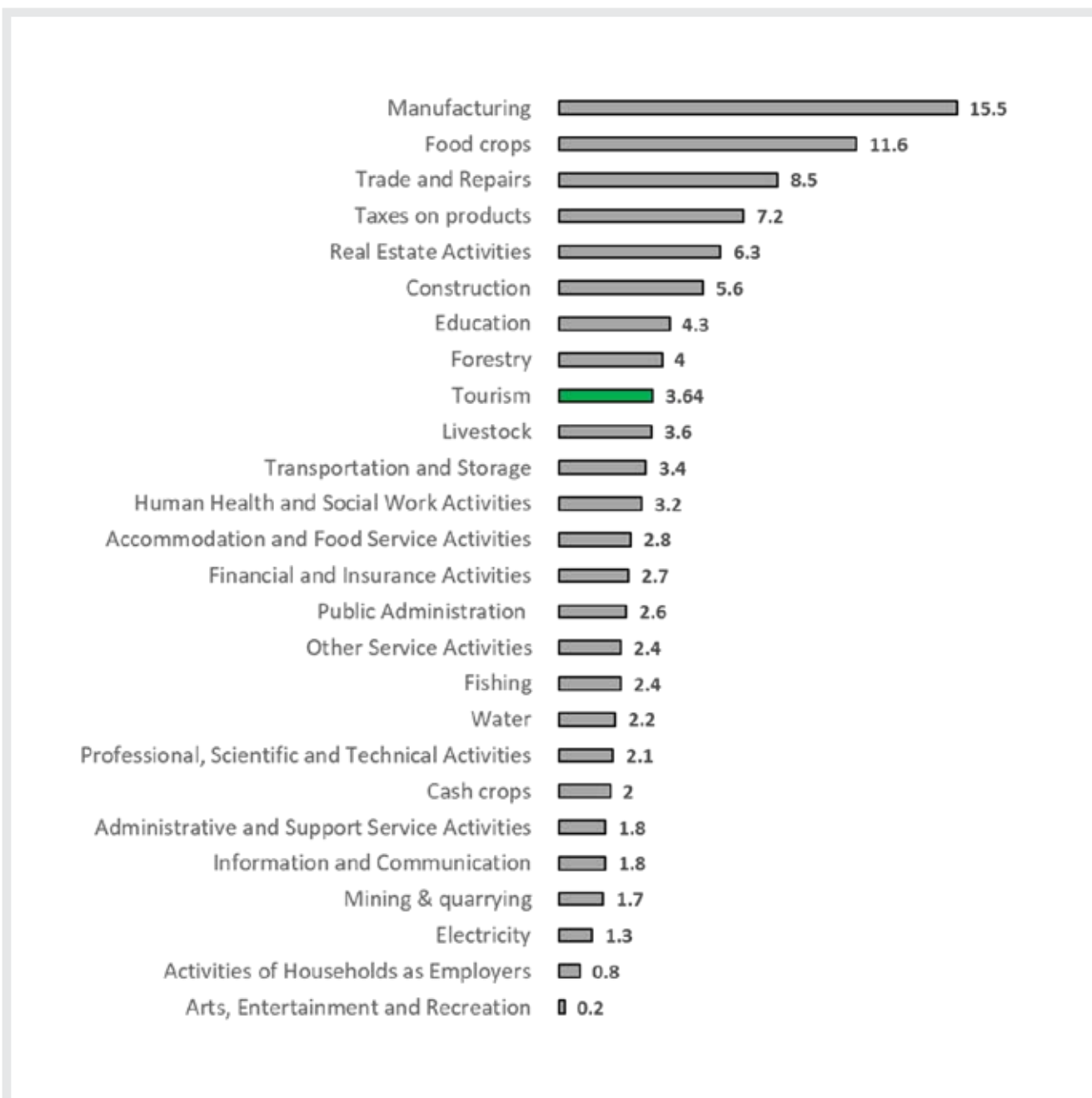
Tourism Direct Gross Product (TDGDP) (adjusted for taxes, trade and transport margins) totaled to UGX 5,093 billion in 2019. Overall, Tourism industry directly contributed 3.64 percent to GDP in 2019.



**TOURISM CONTRIBUTES MORE TO THE ECONOMY THAN LIVESTOCK, TRANSPORTATION & STORAGE, FINANCIAL & INSURANCE ACTIVITIES, FISHING, CASH CROPS, MINING & QUARRYING,**

Tourism Direct Gross Domestic Product was 3.64 percent of the national economy in 2019, which places tourism ahead of Livestock, Transportation and Storage, Human Health and Social Work Activities, Financial and Insurance Activities, Public Administration, Fishing, Water, Professional, Scientific and Technical Activities, Cash crops, Administrative and Support Service Activities, Information and Communication, Mining & quarrying and Electricity.

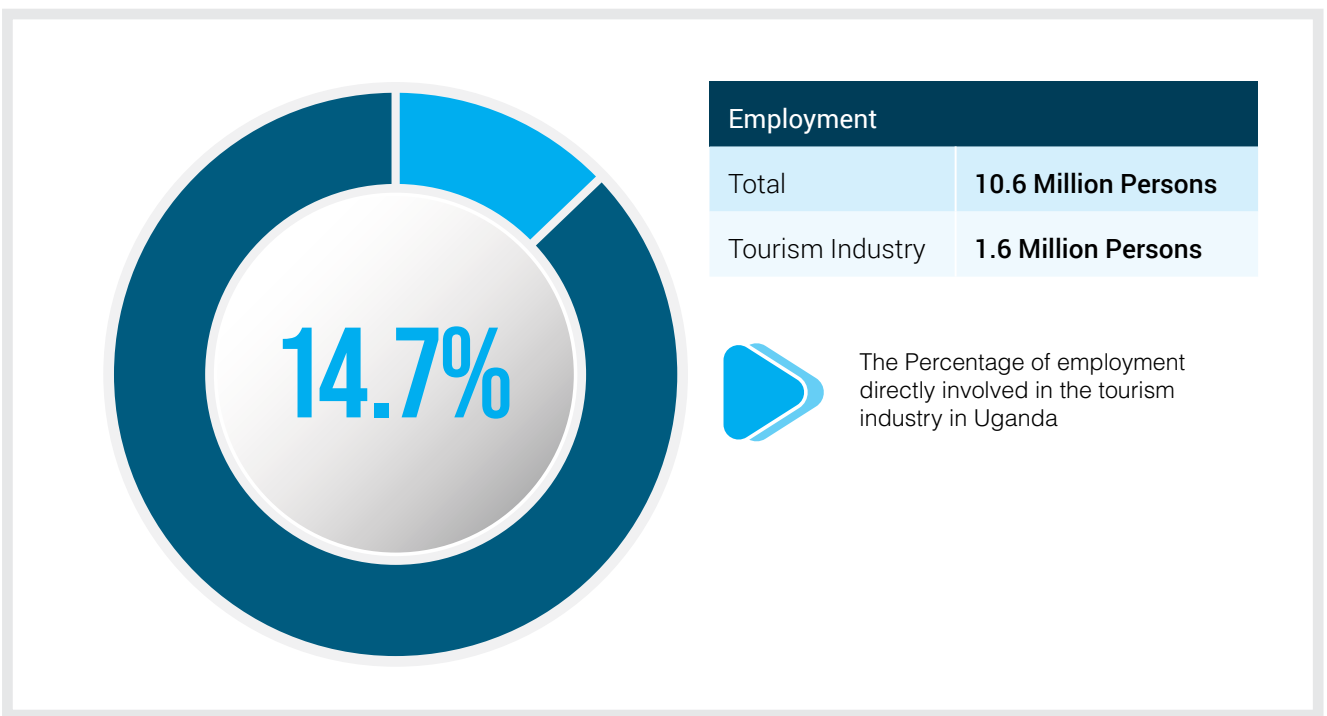
Exhibit 6: Comparison of Tourism Direct GDP to the rest of the Economy



# UGANDA'S TOURISM WORKFORCE

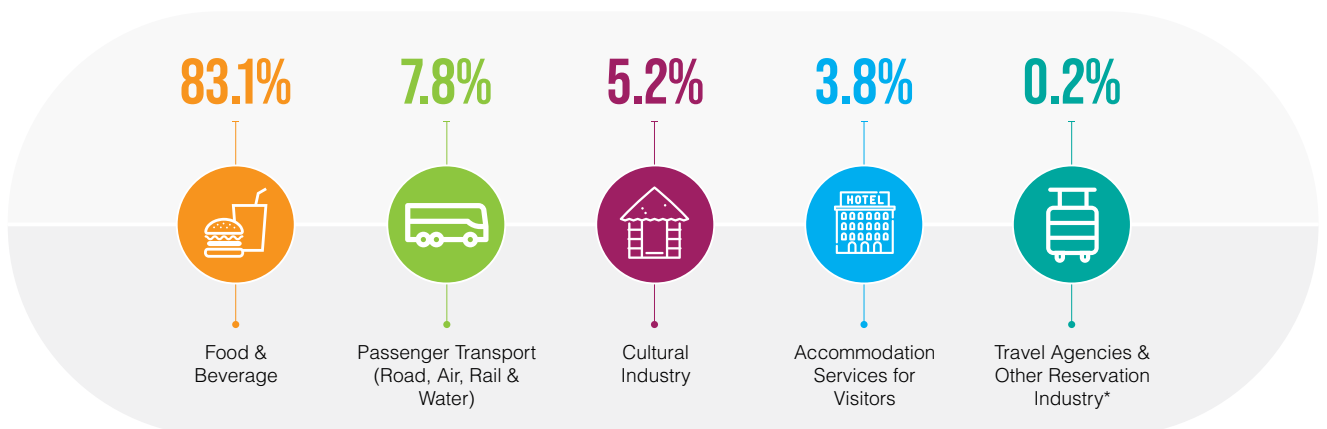
## Higher Employment in the Tourism Industry: Nearly 2 in 10 of Ugandans are employed in Tourism

Tourism covers a diverse range of activities and provides a substantial contribution to Uganda's economy, making it a major employer of Uganda's workers. The Tourism Industry in 2019 provided jobs for 1,559,147 workers directly-equivalent to 14.7 percent of the total employment in Uganda.



## 8 in every 10 workers is in the Food and Beverage Serving industry

The top contributors to Employment in Tourism





### TOURISM IS AN INDUSTRY WITH HIGH SELF EMPLOYED AND FEMALE EMPLOYMENT

Those working in tourism are more likely to be self-employed. In 2019, tourism provided employment to 819,574 self-employed workers and 739,573 employees, meaning that 52.6 percent were self-employed.

One factor contributing to the larger share of self-employed workers is the high rate of female employment. In 2019, there were 1,059,300 females employed in the industry-68 percent of the total workforce implying that about 7 in every 10 persons employed in the Tourism industry are female. The number of males employed in tourism was 499,847 in 2019.

### TOURISM IS AN INDUSTRY WITH A LARGE INFORMAL SECTOR

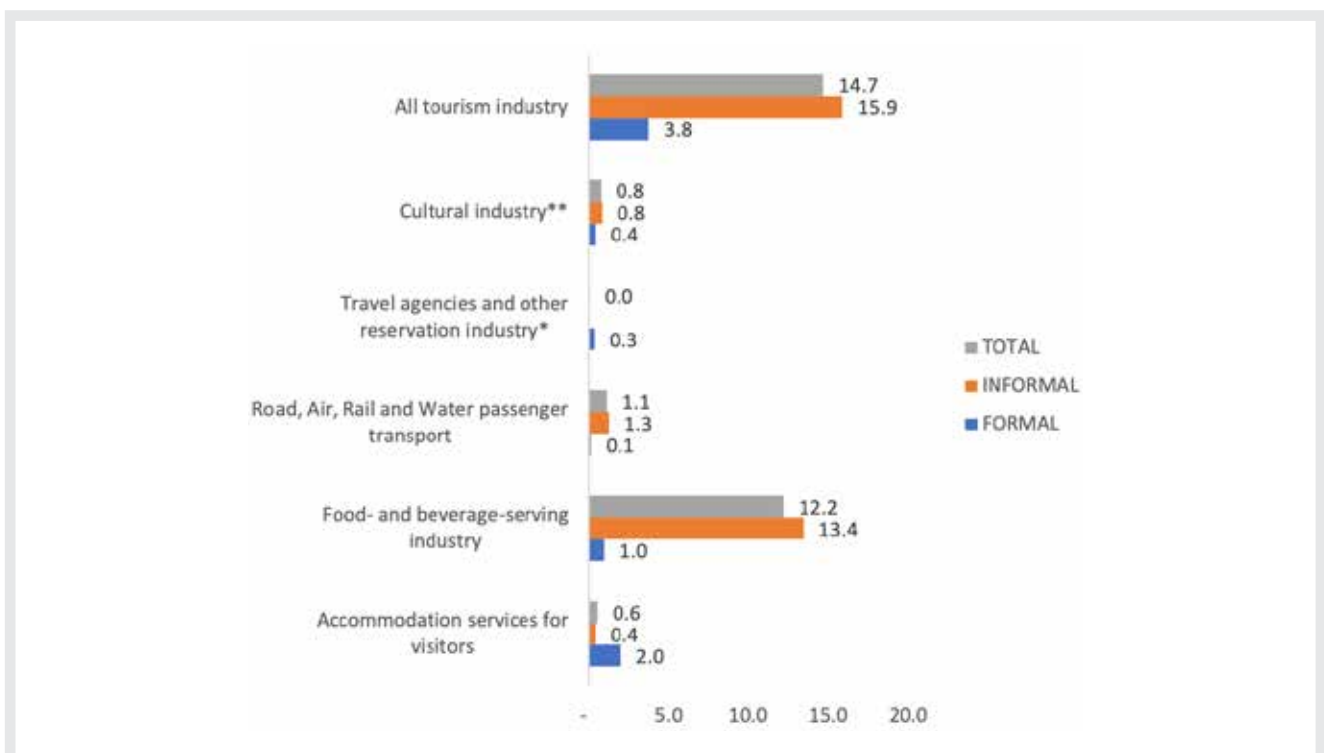
In 2019, 1,519,173 workers were employed in the informal sector and only 39,974 workers in the formal sector. This means most direct employment in the tourism industry is in the informal sector (16%) and is mainly attributed to the high employment in the food and beverage serving industry (12%).

### TWO THIRDS OF TOURISM JOBS ARE IN FOOD AND BEVERAGE SERVING SERVICES

The food services industry consists of cafes, restaurants and takeaways and clubs, pubs and bars which are the main employers of tourism workers. The industry provided employment to 1,295,281 persons in 2019. Other leading employers were

- Road, Air, rail and Water Passenger Transport - **120,913 workers**
- Cultural Industry - **80,869 workers**
- Accommodation - **58,716 workers**
- Travel agencies and other reservation industry - **3,368 workers**

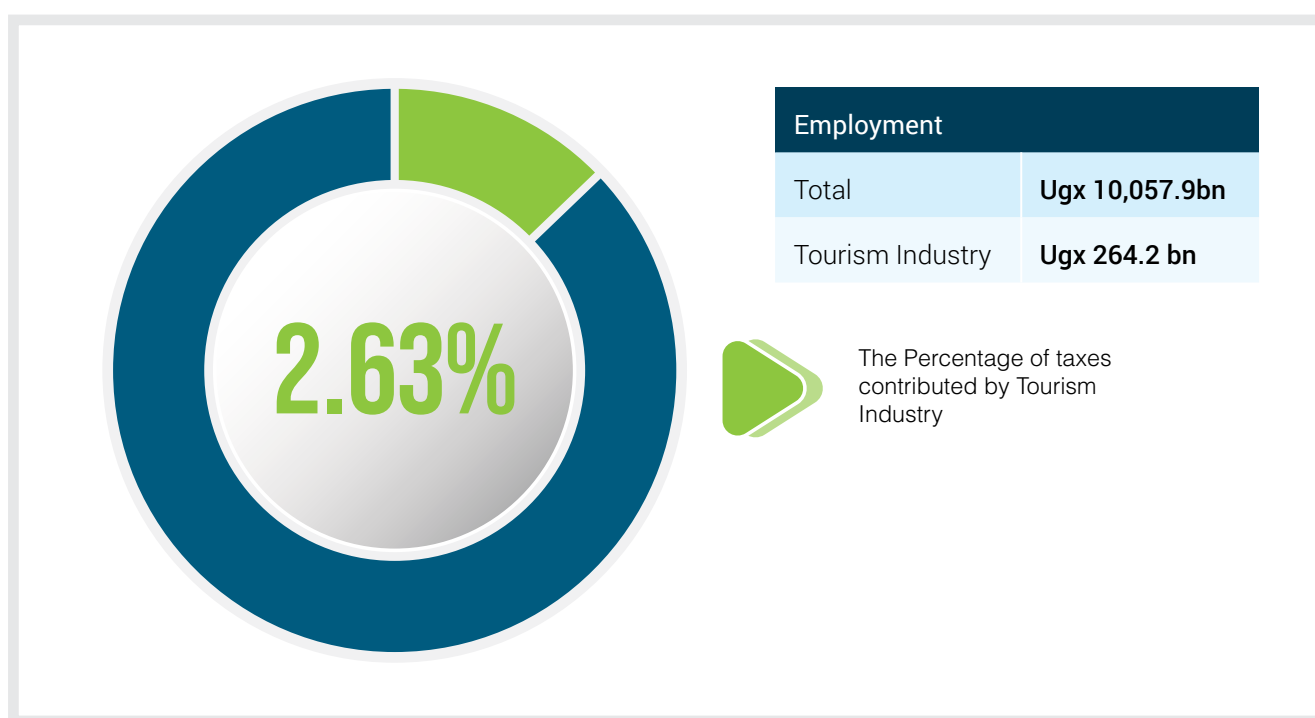
Exhibit 7: Direct contribution of tourism to employment by type of industry



# TOURISM CONTRIBUTION TO TAXES

## TOURISM CONTRIBUTES SIGNIFICANTLY TO TAXES

In 2019, Tourism directly contributed UGX 264.2 billion to taxes - **equivalent to 2.63 percent of total taxes.**



## TOURISM GROSS FIXED CAPITAL FORMATION

Tourism gross fixed capital formation (GFCF) refers to investment on produced fixed assets which are used exclusively or almost exclusively in the production of tourism characteristic goods and services. Tourism driven investment can generally be classified in three main categories, as follows:

- Tourism-specific fixed assets;
- Investment by the tourism industries in non-tourism-specific fixed assets;
- Tourism-related infrastructure

**The Tourism GFCF amounted to UGX 6.4 trillion in 2019:** GFCF was estimated at UGX 33.8 trillion of which direct contribution of Tourism was UGX 6.4 trillion representing 19.0 percent of the total investment in 2019.

## TOURISM COLLECTIVE CONSUMPTION

Tourism Collective Consumption Tourism collective consumption refers to government expenditure associated with support and control of tourism

The total collective consumption largely related to tourism was valued at UGX 903.34 Bn. This represents 2.41 percent of the total collective consumption in Uganda. The highest expenditure for tourism related consumption is on Public administrative services, contributing 78.1% of the total tourism collective consumption.

## NON-MONETARY INDICATORS

Exhibit 8: Number of trips and overnights by forms of tourism and classes of visitors, 2019

|                      | Inbound Tourism               |                                   | Domestic Tourism              |                                   | Outbound Tourism              |                                   |
|----------------------|-------------------------------|-----------------------------------|-------------------------------|-----------------------------------|-------------------------------|-----------------------------------|
|                      | Tourists (overnight visitors) | Excursionists (same-day visitors) | Tourists (overnight Visitors) | Excursionists (same-day visitors) | Tourists (overnight visitors) | Excursionists (same-day visitors) |
| Number of trips      | 1,468,876                     | 73,744                            | 8,608,127                     | 12,882,831                        | 297,380                       |                                   |
| Number of overnights | 12,191,712                    |                                   | 23,458,783                    |                                   | 4,758,080                     |                                   |

Source: Uganda Migration Statistics 2019 (MoIA), Uganda National household Survey 2019/20, Bank of Uganda Outbound survey 2019, Tourist Expenditure and Motivation Survey 2019

Close to 580,000 inbound visitors (35.8 percent) of arrivals travelled by air through scheduled flights, the rest of inbound arrivals (64.2 percent) were reported to have used Road as their mode of travel in 2019

Exhibit 9: Inbound tourism: Number of arrivals and overnights by modes of transport, 2019

|                        | Number of Arrivals | Number of Overnights |
|------------------------|--------------------|----------------------|
| <b>1. Air</b>          | 579,957            | 4,583,548            |
| 1.1. Scheduled flights | 579,957            | 4,583,548            |
| <b>3. Land</b>         | 962,663            | 7,608,165            |
| <b>Total</b>           | <b>1,542,620</b>   | <b>12,191,712</b>    |

Source: Uganda Migration Statistics 2019 (MoIA), Tourist Expenditure and Motivation Survey 2019

Uganda has a total of 16,465 accommodation establishments. These include Hotels, Resort hotels, Motels, Motor hotels, Guesthouses, Bed and breakfast units, Time-share units, Chalets, housekeeping cottages, cabins, among others.

Exhibit 10: Number of establishments and capacity by types of accommodation

| Accommodation for visitors in ISIC 55 | Short-term Accommodation Activities |
|---------------------------------------|-------------------------------------|
| Number of establishments              | 16,465                              |
| Capacity (rooms)                      | 255,203                             |
| Capacity (beds)                       | 270,252                             |
| Capacity utilization (rooms)          | <b>51.9%</b>                        |
| Capacity utilization (beds)           | 45.8%                               |

Source: MAPU 2016/17, UBOS Quarterly Accommodation Surveys 2019 and Population Census 2014

A total of 998,876 Tourism establishments were available in 2019 with the majority employing an average between 1 to 4 workers (85.2 percent of the total number of Establishments). 10.3 percent of the establishments (103,107) employed between 5 to 9 workers while less than 5 percent offered more than 10 jobs in 2019.

Exhibit 11: Number of establishments in tourism industries classified according to average number of jobs (2019)

| Tourism Industries                                 | Number of Jobs |                |               |               |              |              | TOTAL          |
|--|----------------|----------------|---------------|---------------|--------------|--------------|----------------|
|  | 1-4            | 5-9            | 10-19         | 20-49         | 50-99        | >100         |                |
| 1. Accommodation services for visitors             | 17,585         | 2,631          | 2,237         | 141           | 20           | 2            | 22,616         |
| 2. Food- and beverage-serving industry             | 699,192        | 93,213         | 30,350        | 11,408        | 7            | 52           | 834,222        |
| 3. Road, Air, Rail and Water passenger transport   | 102,507        | 3              | 6             | 9             | 377          | 6            | 102,908        |
| 4. Travel agencies and other reservation industry* | 1,733          | 226            | -             | 1             | 36           | -            | 1,996          |
| 5. Cultural industry**                             | 29,973         | 7,033          | 87            | 37            | 3            | 1            | 37,134         |
| <b>Total</b>                                       | <b>850,989</b> | <b>103,107</b> | <b>32,680</b> | <b>11,596</b> | <b>443</b>   | <b>61</b>    | <b>998,876</b> |
| <b>Percentage</b>                                  | <b>85.2%</b>   | <b>10.3%</b>   | <b>3.3%</b>   | <b>1.2%</b>   | <b>0.04%</b> | <b>0.01%</b> | <b>100%</b>    |

## POLICY IMPLICATIONS AND CONCLUSIONS

- i). The TSA measures the Direct Contribution of Tourism to economic growth and investment. This informs policy makers on which areas have higher returns to investment and how the sector can be boosted for poverty alleviation and gender equality.
- ii). The Tourism sector contributed 3.64 percent to GDP in 2019 implying that without the tourism sector, the GDP would have been UGX 134.8 trillion instead of UGX 140 trillion reported in 2019.
- iii). Without tourism, the service sector would have contributed 39.5 percent only to total GDP instead of 43 percent and 0.2 percent of taxes wouldn't have been realised.

| National Accounts, 2019 in Billion UGX    | GVA     | GVA Tourism Share | %ge Share to Total GDP | %ge Share to GDP less Tourism | Real %ge Tourism Share to GDP |
|---|---------|-------------------|------------------------|-------------------------------|-------------------------------|
| GDP at market prices                      | 139,920 | 5,093             | 100.0                  | 100.0                         | 3.6                           |
| Agriculture, forestry and fishing         | 32,979  | -                 | 23.6                   | 23.6                          | -                             |
| Cash crops                                | 2,772   | -                 | 2.0                    | 2.0                           | -                             |
| Food crops                                | 16,231  | -                 | 11.6                   | 11.6                          | -                             |
| Livestock                                 | 5,049   | -                 | 3.6                    | 3.6                           | -                             |
| Agriculture Support Services              | 20      | -                 | 0.0                    | 0.0                           | -                             |
| Forestry                                  | 5,587   | -                 | 4.0                    | 4.0                           | -                             |
| Fishing                                   | 3,320   | -                 | 2.4                    | 2.4                           | -                             |
| Industry                                  | 36,779  | -                 | 26.3                   | 26.3                          | -                             |
| Mining & quarrying                        | 2,310   | -                 | 1.7                    | 1.7                           | -                             |
| Manufacturing                             | 21,656  | -                 | 15.5                   | 15.5                          | -                             |
| Electricity                               | 1,873   | -                 | 1.3                    | 1.3                           | -                             |
| Water                                     | 3,111   | -                 | 2.2                    | 2.2                           | -                             |
| Construction                              | 7,829   | -                 | 5.6                    | 5.6                           | -                             |
| Services                                  | 60,104  | 4,829             | 43.0                   | 39.5                          | 3.4%                          |
| Trade and Repairs                         | 11,943  | 10                | 8.5                    | 8.5                           | -                             |
| Transport and storage                     | 4,797   | 1,579             | 3.4                    | 2.3                           | 1.1%                          |
| Accommodation and Food Service Activities | 3,850   | 2,564             | 2.8                    | 0.9                           | 1.8%                          |
| Information and Communication             | 2,553   | -                 | 1.8                    | 1.8                           | -                             |
| Financial and Insurance Activities        | 3,748   | -                 | 2.7                    | 2.7                           | -                             |
| Real Estate Activities                    | 8,863   | -                 | 6.3                    | 6.3                           | -                             |

| National Accounts, 2019 in Billion UGX            | GVA    | GVA Tourism Share | %ge Share to Total GDP | %ge Share to GDP less Tourism | Real %ge Tourism Share to GDP |
|---|--------|-------------------|------------------------|-------------------------------|-------------------------------|
| Professional, Scientific and Technical Activities | 2,911  | -                 | 2.1                    | 2.1                           | -                             |
| Administrative and Support Service Activities     | 2,556  | -                 | 1.8                    | 1.8                           | -                             |
| Public Administration                             | 3,668  | -                 | 2.6                    | 2.6                           | -                             |
| Education   | 5,963  | -                 | 4.3                    | 4.3                           | -                             |
| Human Health and Social Work Activities           | 4,546  | -                 | 3.2                    | 3.2                           | -                             |
| Arts, Entertainment and Recreation                | 258    | 214               | 0.2                    | 0.0                           | 0.2%                          |
| Other Service Activities                          | 3,388  | 462               | 2.4                    | 2.1                           | 0.3%                          |
| Activities of Households as Employers             | 1,059  | -                 | 0.8                    | 0.8                           | -                             |
| Taxes on products                                 | 10,058 | 264.2             | 7.2                    | 7.0                           | 0.2%                          |

- iv). Accommodation and food services for tourism had the biggest contribution of 1.8 percent followed by transport and storage with a 1.1 percent contribution to the total tourism share. This implies that in order to realise higher returns in tourism, the transport sector, accommodation and food service activities should be given a special attention in investment. (See Exhibit above)
- v). Arts, entertainment and recreational services were almost entirely tourism as shown by the 0.2 percent contribution to GDP. This implies that in order to boost tourism, this sector is key. Bodies like Uganda Wildlife Authority, Uganda Museum, Uganda National Cultural Centre (UNCC), Uganda Community Tourism Association etc should be supported and their activities boosted by government in order to impact their efficiency and effectiveness to the economy. Uganda has many cultural sites but the United Nations Educational, Scientific and Cultural Organization (UNESCO) recognize only three. These bring in forex exchange and if all the sites are improved to the standard of UNESCO, it will pay off as a good investment for the country
- vi). Tourism alone directly contributed 14.7 percent to the total employment implying that tourism can be applied as a tool for combating poverty and unemployment.
- vii). Almost all establishments directly involved in tourism (99%) were in the informal industry with a negligible proportion in the travel agency and other reservation industry. This implies that policies targeting the growth of the informal sector should be formulated if we are to boost tourism and contribute to improvement of livelihood of Ugandans.
- viii). The distribution of persons employed directly in the Tourism industries is biased towards females (68%) implying that about 7 in every 10 persons employed in the Tourism industry are female though, sex differentials are seen in the tourism industries with males' dominant in all industries except food and beverage serving industry and accommodation services for visitors. Therefore, the tourism industry could be targeted to balance the gender inequality gap.
- ix). The information in the Uganda Tourism Satellite Account (UTSA) can be used to measure Uganda's progress in meeting her national and global development goals.
- x). The Tourism Satellite Account results can be used by the Tourism industry and government to track growth and support strategies for a stronger and more sustainable tourism industry

Exhibit 12: Basic Data and Indicators for Inbound Tourism

| 1.   | Inbound Tourism                       | Units  | 2019      | %    |
|------|---------------------------------------|--------|-----------|------|
|      | <b>Data</b>                           |        |           |      |
|      | <b>Arrivals</b>                       |        |           |      |
| 1.1  | Total                                 | ('000) | 1,542,620 | 100  |
| 1.2  | Overnight visitors (tourists)         | ('000) | 1,468,876 | 95.2 |
| 1.3  | Same-day visitors (excursionists)     | ('000) | 73,744    | 4.8  |
| 1.4  | * of which, cruise passengers         | ('000) |           |      |
|      | <b>Arrivals by region</b>             |        |           |      |
| 1.5  | Total                                 | ('000) | 1,542,620 | 100  |
| 1.6  | Africa                                | ('000) | 1,044,227 | 67.7 |
| 1.7  | Americas                              | ('000) | 150,440   | 9.8  |
| 1.8  | East Asia and the Pacific             | ('000) | 38,335    | 2.5  |
| 1.9  | Europe                                | ('000) | 248,800   | 16.1 |
| 1.10 | Middle East                           | ('000) | 29,858    | 1.9  |
| 1.11 | South Asia                            | ('000) | 30,960    | 2.0  |
| 1.12 | Other not classified                  | ('000) |           |      |
| 1.13 | * of which, nationals residing abroad | ('000) |           |      |
|      | <b>Arrivals by main purpose</b>       |        |           |      |
| 1.14 | Total                                 | ('000) | 1,542,620 | 100  |
| 1.15 | Personal                              | ('000) | 911,688   | 59.1 |
| 1.16 | * holidays, leisure and recreation    | ('000) | 297,726   | 19.3 |
| 1.17 | * other personal purposes             | ('000) | 613,962   | 39.8 |
| 1.18 | Business and professional             | ('000) | 630,932   | 40.9 |
|      | <b>Arrivals by mode of transport</b>  |        |           |      |
| 1.19 | Total                                 | ('000) | 1,542,620 | 100  |
| 1.20 | Air                                   | ('000) | 579,957   | 38   |
| 1.21 | Water                                 | ('000) |           |      |
| 1.22 | Land                                  | ('000) | 962,663   | 62   |
| 1.23 | * railway                             | ('000) |           |      |
| 1.24 | * road                                | ('000) | 962,663   | 62   |
| 1.25 | * others                              | ('000) |           |      |



| 1.   | Inbound Tourism                                     | Units   | 2019      | %    |
|------|---|---------|-----------|------|
|      | <b>Arrivals by form of organization of the trip</b> |         |           |      |
| 1.26 | Total   | ('000)  | 1,542,620 | 100  |
| 1.27 | Package tour  | ('000)  | 125,302   | 8.1  |
| 1.28 | Other forms   | ('000)  | 1,417,318 | 91.9 |
|      | <b>Indicators</b>                                   |         |           |      |
| 1.39 | Average size of travel party                        | Persons | 1.9       |      |
|      | Average length of stay                              |         | 8.3       |      |
| 1.44 | Average expenditure per day                         | US\$    | 111       |      |

Exhibit 13: Basic Data and Indicators for Domestic Tourism.

| 2.   | Domestic Tourism                     | Units  | 2019       | %    |
|------|--------------------------------------|--------|------------|------|
|      | <b>Data</b>                          |        |            |      |
|      | <b>Trips</b>                         |        |            |      |
| 2.1  | Total                                | ('000) | 21,490,960 | 100  |
| 2.2  | Overnight visitors (tourists)        | ('000) | 8,608,132  | 40.1 |
| 2.3  | Same-day visitors (excursionists)    | ('000) | 12,882,828 | 59.9 |
|      | <b>Trips by main purpose</b>         |        |            |      |
| 2.4  | Total                                | ('000) | 21,490,960 | 100  |
| 2.5  | Personal                             | ('000) | 18,426,952 | 85.7 |
| 2.6  | * holidays, leisure and recreation   | ('000) | 4,068,552  | 18.9 |
| 2.7  | * other personal purposes            | ('000) | 14,358,400 | 66.8 |
| 2.8  | Business and professional            | ('000) | 3,064,008  | 14.3 |
|      | <b>Trips by form of organization</b> |        |            |      |
| 2.16 | Total                                | ('000) | 21,490,960 | 100  |
| 2.17 | Package tour                         | ('000) | 657,124    | 3.1  |
| 2.18 | Other forms                          | ('000) | 20,833,836 | 96.9 |
|      | <b>Indicators</b>                    |        |            |      |
|      | Average length of stay               |        | 5.1        |      |
| 2.28 | Average expenditure per day          | UGX    | 40,239     |      |

Exhibit 14: Key findings of the Tourism Satellite Account for Uganda

| #   | Indicators  | 2019 (Ugx Billion) |
|-----|---|--------------------|
| 1.  | Inbound Tourism Expenditure (Tourism Exports)   | 4,580.40           |
| 2.  | Outbound Tourism Expenditure (Tourism Imports)  | 1,666.28           |
| 3.  | Tourism Trade Balance with the Rest of the World (Net Export)                               | 2,914.12           |
| 4.  | Domestic Tourism Expenditure  | 2,965.87           |
| 5.  | Internal Tourism Expenditure  | 7,546.27           |
| 6.  | Other Components of Tourism Consumption   | 450.65             |
| 7.  | Internal Tourism Consumption  | 7,996.92           |
| 8.  | Total Gross Value Added (GVA)   | 129,861.60         |
| 9.  | Tourism Direct Gross Value Added (TDGVA)  | 4,828.99           |
| 10. | Tourism Direct Gross Value Added (TDGVA) (% Of GVA)   | 3.72%              |
| 11. | Total Gross Domestic Product (GDP)  | 139,919.54         |
| 12. | Tourism Direct Gross Domestic Product (TDGDP)   | 5,093.15           |
| 13. | Tourism Direct Gross Domestic Product (TDGDP) (% Of GDP)                                    | 3.64%              |
| 14. | Total persons employed (millions)   | 10.64              |
| 15. | Persons directly engaged in producing goods and services purchased by visitors (Millions)   | 1.559              |
| 16. | Persons directly engaged in producing goods and services purchased by visitors (% of total) | 14.7%              |
| 17. | Total Gross Fixed Capital Formation (GFCF)  | 33,847.7           |
| 18. | Tourism Direct Gross fixed Capital Formation (TGFCF)  | 6,444.83           |
| 19. | Tourism Direct Gross Fixed Capital Formation (% of GFCF)                                    | 19.0%              |
| 20. | Total Collective Consumption  | 37,480.54          |
| 21. | Tourism Collective Consumption (TCC)  | 903.34             |
| 22. | Tourism Direct Collective Consumption (% of Total Collective Consumption)                   | 2.41%              |

Exhibit 15: Macroeconomic indicators

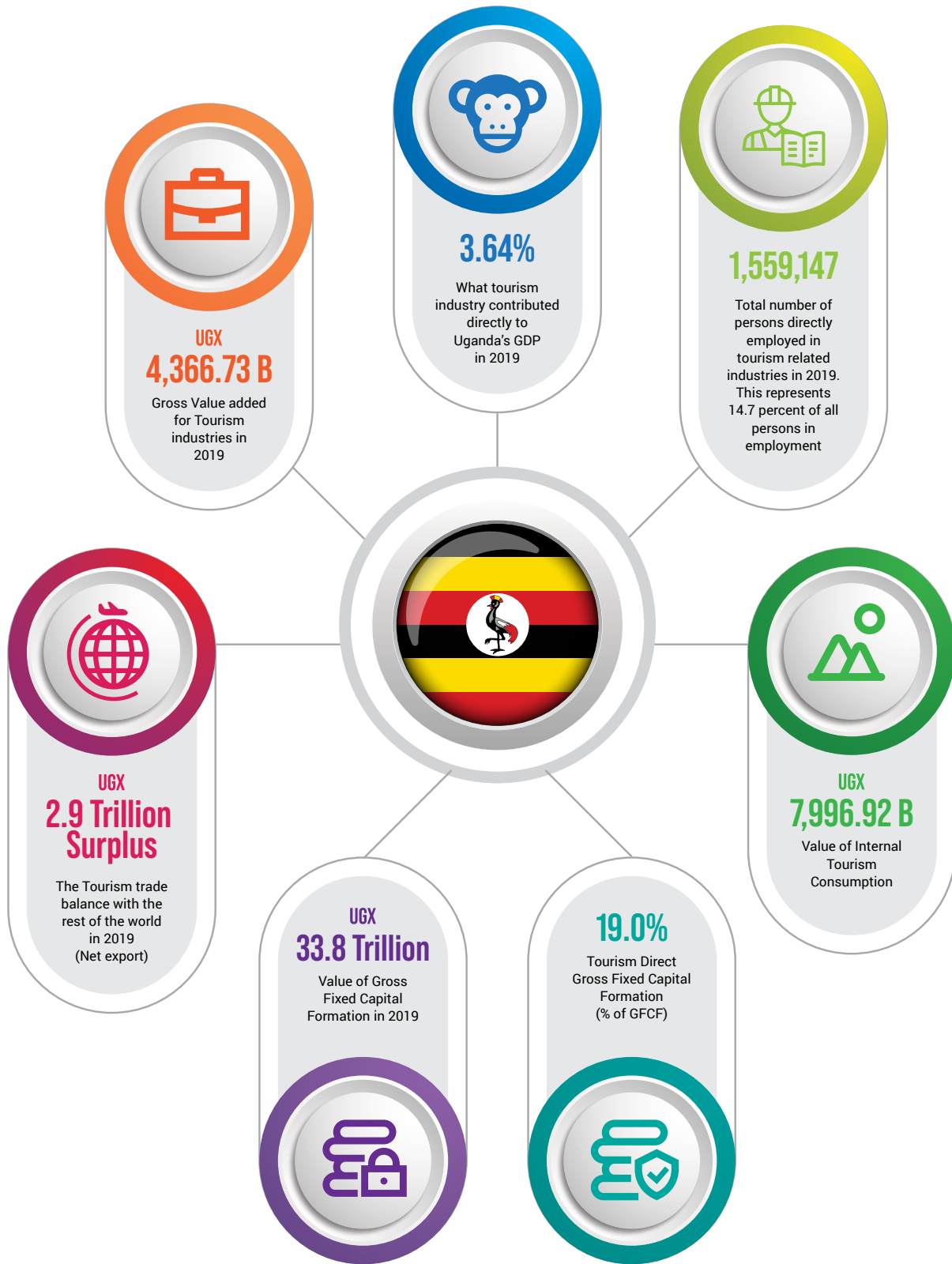
|                                     |   | Units   |             |
|-------------------------------------|---|---------|-------------|
| GDP                                 | Tourism Direct GDP as % of total GDP    | Percent | 3.6         |
|                                     | Total Gross Domestic Product (GDP)      | UGX Mn  | 139,919,538 |
|                                     | Tourism Direct GDP                      | UGX Mn  | 5,093,149   |
| GDP                                 | Tourism Direct GVA as % of total GVA    | Percent | 3.7         |
|                                     | Total Gross Value Added (GVA)           | UGX Mn  | 129,861,604 |
|                                     | Tourism Direct GVA                      | UGX Mn  | 4,828,985   |
| <b>Internal tourism consumption</b> |   |         |             |
|                                     | Internal tourism expenditure            | UGX Mn  | 7,546,273   |
|                                     | of which: Inbound tourism expenditure   | UGX Mn  | 4,580,399   |
|                                     | of which: Domestic tourism expenditure  | UGX Mn  | 2,965,874   |
|                                     | Other components of tourism consumption | UGX Mn  | 450,650     |
|                                     | Total Internal tourism consumption      | UGX Mn  | 7,996,923   |
|                                     | GVA in tourism industries (GVATI)       | UGX Mn  | 4,366,734   |

Exhibit 16: Macroeconomic international tourism related indicators

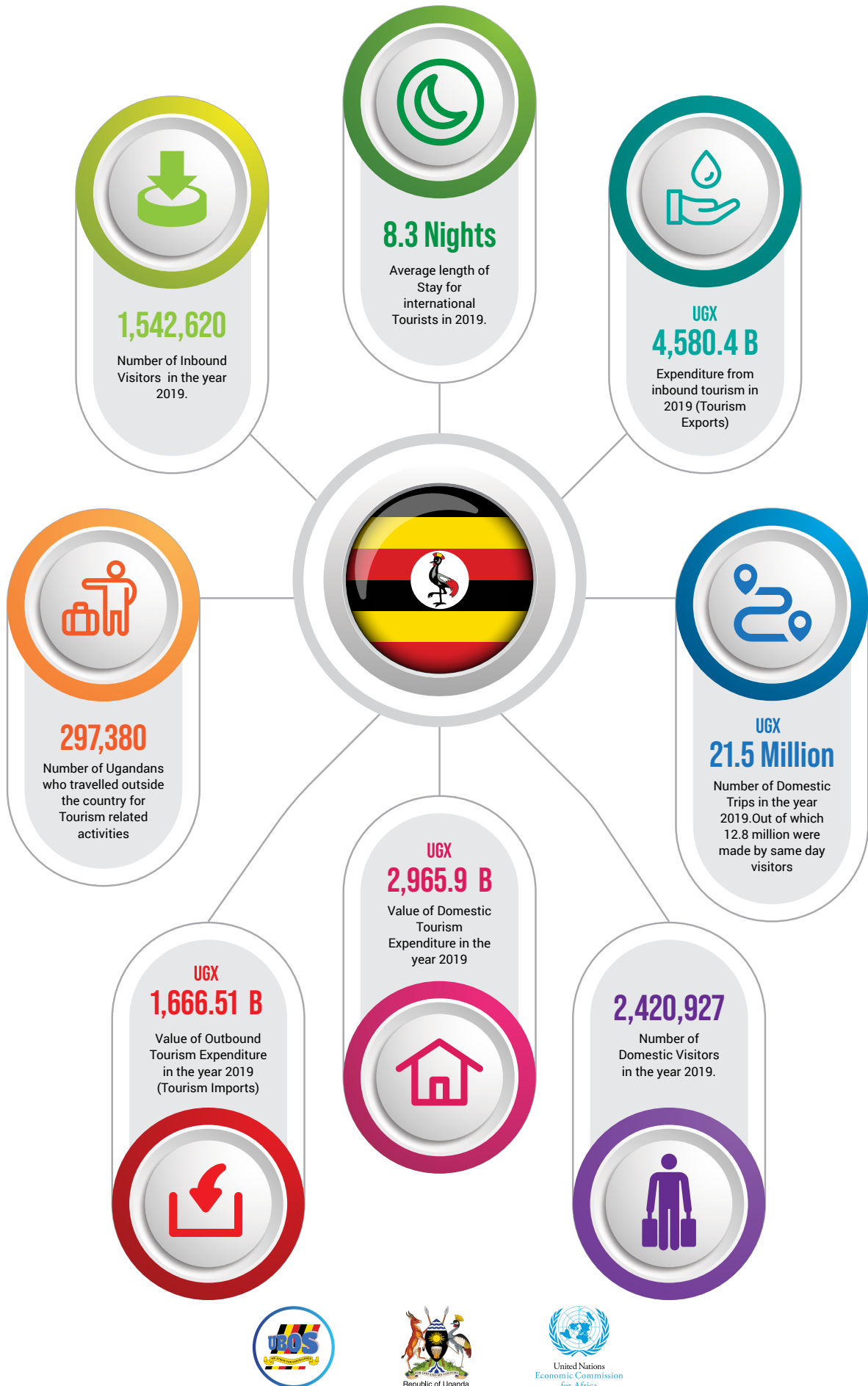
| Macroeconomic indicators related to international tourism             | -         | -           | %     |
|---|-----------|-------------|-------|
| Inbound tourism expenditure over GDP                                  | 4,580,399 | 139,919,538 | 3.3   |
| Outbound tourism expenditure over GDP                                 | 1,666,281 | 139,919,538 | 1.2   |
| Tourism balance (inbound minus outbound tourism expenditure) over GDP | 2,914,119 | 139,919,538 | 2.1   |
| Tourism openness (inbound plus outbound tourism expenditure) over GDP | 6,246,680 | 139,919,538 | 4.5   |
| Tourism coverage (inbound over outbound tourism expenditure)          | 4,580,399 | 1,666,281   | 274.9 |
| Inbound tourism expenditure over exports of goods                     | 4,580,399 | 15,170,202  | 30.2  |
| Inbound tourism expenditure over exports of services                  | 4,580,399 | 7,689,901   | 59.6  |
| Inbound tourism expenditure over exports of goods and services        | 4,580,399 | 22,860,103  | 20.0  |
| Inbound tourism expenditure over current account credits              | 4,580,399 | 30,602,800  | 15.0  |
| Outbound tourism expenditure over imports of goods                    | 1,666,281 | 25,373,064  | 6.6   |
| Outbound tourism expenditure over imports of services                 | 1,666,281 | 10,907,721  | 15.3  |
| Outbound tourism expenditure over imports of goods and services       | 1,666,281 | 36,280,785  | 4.6   |
| Outbound tourism expenditure over current account debits              | 1,666,281 | 39,891,212  | 4.2   |

Source: UBOS Statistical Abstract 2019, TSA Technical Committee Estimates, TEMS 2019, UNHS 2019/20, BOU Outbound Survey

## TOURISM SATELLITE ACCOUNT (TSA)



# TOURISM SATELLITE ACCOUNT (TSA)





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