The Republic of Uganda

MINISTRY OF TOURISM, TRADE AND INDUSTRY

PAMSU PROJECT

CONSOLIDATED LOW AND PEAK SEASONS EXPENDITURE AND MOTIVATION SURVEY REPORT

2003

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FOREWORD

For over a decade, the Government has implemented policies and programs that have resulted into growth of the tourism sector. Government has exhibited its commitment to ensuring growth of the sector through consistent investment in tourism infrastructure and other capacity needs. Growth of the country's tourism sector is now widely acknowledged; as the national bed capacity more than quadruples in less than ten years and tourist arrivals more than double in less than five years, among several other key sector growth indicators.

However, absence of data on key indicators and operating variables has continued to dodge monitoring and decision and policy making within the sector. Development of the tourism database and related Management Information Systems are, therefore, being undertaken as a key priority by the Ministry of Tourism, Trade and Industry (MTTI). To this end, a number of surveys were conducted by the Ministry between 2001 and 2003, through its Protected Areas Management and Sustainable Use (PAMSU) project, to obtain baseline information on the sector. The key surveys conducted are: (i) Inventory of Accommodation Establishments; (ii) Inventory of Non-Accommodation Tourism Related Establishments; (iii) Inventory of Currently Exploited and Potential Attractions; and (iv) Expenditure and Motivation Surveys (2001 and 2003).

This report on the Expenditure and Motivation Survey, conducted in 2003, has been shared widely, before publication, by all key stakeholders including the Uganda Bureau of Statistics, Bank of Uganda and the private sector (the Uganda Tourism Association). The report gives key characteristics about the expenditure, travel patterns and experiences and expectations of tourists to the country. MTTI welcomes comments aimed at improving similar reports in future.

MTTI is grateful to the development partners, particularly the World Bank, for the support given for the tourism data base and other activities. We also commend

the Consultant, Immigration and MTTI staff and other members of the inter-agency team for designing and implementing the survey.

Dr Sam Nahamya

PERMANENT SECRETARY

EXECUTIVE SUMMARY

The 2003 Consolidated Expenditure and Motivation Survey Report provides baseline statistics on general characteristics of tourist visitors to Uganda. The report is a product of two surveys conducted during the low and peak tourist arrivals periods experienced in the country. The low period survey was conducted during the months of March – May 2003, while the peak period one was undertaken during the months of July – September 2003.

Both the low and peak period survey interviews were conducted at the country's three main border entry/exit points of Entebbe International Airport, Busia and Malaba for a duration the 180 days.

The systematic sampling survey technique was used; and involved interviewing every 8th, 10th and 9th departing tourist at Entebbe Airport, Malaba and Busia, respectively. The face to face survey interview technique was adopted in order to ensure accurate results. Error terms (desired precision) were fixed at 2 percent and 3 percent, for air and road transport, respectively. The lower error term of 2% was set for Entebbe because of the higher tourist traffic experienced there compared to the road traffic. A 95 percent confidence level was adopted during the survey design.

The data from both surveys was combined to produce a single combined report. The strategy of combining the survey results was intended to provide more reliable statistics for reference in the five-year medium-term period.

The combined total of 7735 respondents was realized. The three entry/exit points realized 4327, 1850 and 1558 respondents for Entebbe International Airport, Malaba and Busia, respectively.

The report contains in-depth analysis of the general profile and expenditure and motivation aspects of tourists visiting Uganda. Like for general profiles and characteristics and expenditure and motivation aspects, the results and findings of the survey are diverse as reflected in the interpretations.

One of the key findings of the survey is that in 2003 the country received a total of at least US dollars 265.35 million as tourist expenditures in the country, excluding all expenditures made abroad. Further analysis indicated that tourism contributed about 4.0 percent to the country's Gross Domestic product. The contribution to foreign exchange earnings of the country was 29.1 percent, excluding all donor financing and remittances of externalized manpower.

To guide planning and policy, five year (2004 -2008) forecasts of tourist arrivals and corresponding receipts have been made and included in this report.

The report comprises six chapters, with the first five chapters containing analysis of specific aspects of the survey that are logically developed to guide comprehensive understanding of the country's tourism. The sixth chapter is devoted to recommendations that are intended to guide improvements, based on the survey findings.

Chapter one contains uni-variate analysis of the profile and general characteristics of the visitors to Uganda.

Chapter two contains analysis of relationships between general visitor characteristics.

Chapter three comprises analysis of the tourists travel behavior patterns.

The fourth chapter consists of the analysis of tourist expenditure patterns.

The fifth chapter is devoted to analysis of visitor rating of the Ugandan destination, including rating of particular services and facilities.

The last chapter consists of the Consultant's recommendations based on the survey results and findings.

It is worthwhile noting that the questionnaire design, interviewing and general management of the survey were implemented with heavy input from key stakeholders in the country, particularly the staff of the Ministry of Tourism, Trade and Industry, the Uganda Bureau of Statistics and Bank of Uganda.

Dhizaala Sanon Moses
DATA BASE CONSULTANT

CHAPTER ONE

GENERAL VISITOR CHARACTERISTICS

Introduction

Chapter one contains information on general characteristics of tourists who came to Uganda in 2003. The information comprises tables, charts and descriptive interpretation of the statistics presented. The analysis is limited to uni-variate frequency analysis of the general characteristics of tourists to the country.

In particular, the Chapter presents information regarding status of tourists and categorizes tourists that are foreign visitors and those that are Ugandans living abroad. The tourists are also categorized by sex, country of usual residence, nationality, occupation and purpose of visit. Other analyses in the Chapter include repeated visits and main sources of information used to know about Uganda.

1.1 Residence profile of tourists to Uganda

It is necessary to understand the residence status of tourists arriving in the country to guide tourism planning and marketing. Foreign visitors as opposed to Ugandans living abroad are the key consumers of tourism products and services. The latter spend less as they normally stay with friends and relatives.

The 2003 surveys results given in Table 1.1 show that only 1 percent of the tourist arrivals are Ugandans living abroad and 99 percent are foreign visitors. Using the Uganda Bureau of Statistics data, this implies that at least 30,000 Ugandans living abroad returned to the country for a visit.

However, a significant number of Ugandans may have come to visit the country during the Christmas holiday period of November-January, which period was not covered by both the low and high season surveys conducted.

The increase in the number of Ugandans returning for a holiday could play a significant role in expanding the country's tourism earnings.

Table 1.1: Tourists categorized by foreign visitors and Ugandan citizens living abroad

	Category of Respondents	Percentage	Number of Cases
1.	Visitors	99.0	7693
2.	Ugandans Citizens Living Abroad	1.0	82
Total		**100**	**7735**

1.2 Tourists by Country of usual residence

The analysis of residence of tourists by country of usual residence is given in Table 1.2. The results indicate that Kenya, the United Kingdom, the United States of America (USA), Tanzania and South Africa are the five leading tourist source markets. Other key tourist source markets are: Germany, Holland, India, Canada and Australia.

From the results in Table 1.2, Kenya, the United Kingdom and the United States of America generated 56 percent of Uganda's tourists.

It is worthwhile noting that Kenya, Tanzania and South Africa are Uganda's most important tourist source markets in Africa. The large number of tourists from Kenya appears to comprise the high income earning and affluent Kenyans of Asian origin and foreign residents working there.

Further market research is necessary to understand the neighboring African source markets better as their tourist supply elasticity may be more easily rewarding than Europe and America.

Table 1.2: Tourists by Country of usual residence

	Country of Usual Residence	% - age	No. of Cases			Country of Usual Residence	%-age	No. of Cases
1	KENYA	32.66	2526		40	FINLAND	0.17	13
2	UNITED KINGDOM	14.09	1090		41	BOTSWANA	0.14	11
3	USA	9.57	740		42	SLOVENIA	0.14	11
4	TANZANIA	5.07	392		43	ERITREA	0.12	9
5	SOUTHAFRICA	4.27	330		44	OMAN	0.12	9
6	GERMANY	2.68	207		45	POLAND	0.12	9
7	HOLLAND	2.68	207		46	SWAZILAND	0.12	9
8	INDIA	2.47	191		47	MAURITIUS	0.10	8
9	CANADA	2.06	159		48	RUSSIA	0.10	8
10	AUSTRALIA	1.54	119		49	SRILANKA	0.10	8
11	DRC	1.31	101		50	HONG KONG	0.09	7
12	SWEDEN	1.25	97		51	MALAYSIA	0.09	7
13	RWANDA	1.18	91		52	MOZAMBIQUE	0.09	7
14	ITALY	1.11	86		53	CAMEROON	0.08	6
15	DENMARK	1.10	85		54	LEBANON	0.08	6
16	FRANCE	1.02	79		55	LESOTHO	0.08	6
17	NORWAY	0.97	75		56	PHILIPINES	0.08	6
18	BELGIUM	0.81	63		57	SOMALIA	0.08	6
19	NEWZEALAND	0.74	57		58	CROATIA	0.06	5
20	ZIMBABWE	0.71	55		59	CZECH REPUBLIC	0.06	5
21	SUDAN	0.70	54		60	MADAGASCAR	0.06	5
22	IRELAND	0.69	53		61	NAMIBIA	0.06	5
23	ISRAEL	0.67	52		62	SINGAPORE	0.06	5
24	SWITZERLAND	0.67	52		63	ARGENTINA	0.05	4
25	SPAIN	0.63	49		64	BRAZIL	0.05	4
26	ETHIOPIA	0.58	45		65	BURKINAFASO	0.05	4
27	JAPAN	0.56	43		66	GAMBIA	0.05	4
28	NIGERIA	0.56	43		67	GREECE	0.05	4
29	ZAMBIA	0.52	40		68	IVORY COAST	0.05	4
30	AUSTRIA	0.49	38		69	NEPAL	0.05	4
31	UNITED ARAB EMIRATES	0.47	36		70	SENEGAL	0.05	4
32	BURUNDI	0.36	28		72	SEYCHELES	0.05	4
33	PAKISTAN	0.35	27			**OTHERS**		
34	CHINA	0.32	25			OTHER EUROPE	0.32	25
35	GHANA	0.31	24			OTHER AFRICA	0.30	23
36	MALAWI	0.28	22			OTHER ASIA	0.30	23
37	EGYPT	0.23	18			OTHER AMERICA	0.25	19
38	KOREA	0.22	17			NOT STATED	0.05	4
39	SCOTLAND-UK	0.18	14					
TOTAL							100	7735

1.2 Tourist Visitors by Nationality

The concept of nationality is often under-rated by tourism market researchers and planners. However, ethnic belonging often determines the values and norms

of visitors, which are key in determining the tourist's tastes and preferences for different types of activities, services and facilities.

The results in Table 1.3 show that 61 percent of the tourists to Uganda are nationals of Kenya, Britain, America, Tanzania and South Africa. The Kenyan nationals who visited Uganda in 2003 were 28.8 percent which contracts with the 32.7 Kenya residents reported in Table 1.2 above. The difference is attributed to foreign non-residents of Kenya who visited Uganda.

Table 1.3: Tourists by Nationality

	Nationality	Perce-ntage (%)	Number of Cases			Nationality	Percen-tage (%)	Number of Cases
1	KENYAN	28.80	2228		36	GHANAIAN	0.28	22
2	BRITISH (MAINLAND)	14.96	1157		37	EGYPTIAN	0.26	20
3	AMERICAN	9.70	750		38	KOREAN	0.26	20
4	TANZANIAN	4.29	332		39	MALAWIAN	0.25	19
5	SOUTHAFRICAN	3.66	283		40	FINISH	0.21	16
6	INDIAN	3.34	258		41	ERITREAN	0.16	12
7	DUTCH	3.09	239		42	SLOVENIAN	0.14	11
8	GERMAN	2.86	221		43	SRILANKAN	0.13	10
9	CANADIAN	2.34	181		44	CAMEROONIAN	0.12	9
10	AUSTRALIAN	1.71	132		45	MAURITIAN	0.12	9
11	UGANDAN	1.46	113		46	POLISH	0.12	9
12	CONGOLESE	1.36	105		47	MOZAMBIQUEAN	0.10	8
13	SWEDISH	1.27	98		48	SCOTISH	0.10	8
14	ITALIAN	1.20	93		49	BRAZILIAN	0.09	7
15	FRENCH	1.15	89		50	MEXICAN	0.09	7
16	DENISH	1.07	83		51	OMANIAN	0.09	7
17	SUDANESE	1.03	80		52	RUSSIAN	0.09	7
18	RWANDESE	1.02	79		53	BURKINABE	0.08	6
19	NORWAGIAN	1.00	77		54	CZECH	0.08	6
20	NEWZEALANDER	0.92	71		55	GREEK	0.08	6
21	IRISH	0.87	67		56	LEBANESE	0.08	6
22	BELGIAN	0.76	59		57	PHILIPIAN	0.08	6
23	ISRAELITE	0.72	56		58	SOTHU	0.08	6
24	NIGERIAN	0.69	53		59	SWAZI	0.08	6
25	SPANISH	0.66	51		60	ARGENTINIAN	0.06	5
26	ETHIOPIAN	0.65	50		61	COLOMBIAN	0.06	5
27	ZIMBABWEAN	0.63	49		62	GAMBIAN	0.06	5
28	JAPANESE	0.61	47		63	MALAYSIAN	0.06	5
29	SWISS	0.56	43		64	NEPALESE	0.06	5
30	AUSTRIAN	0.53	41			OTHER AFRICA	0.49	38
31	SOMALIAN	0.45	35			OTHER EUROPE	0.31	24
32	CHINESE	0.44	34			OTHER ASIA	0.30	23
33	ZAMBIAN	0.44	34			OTHER AMERICA	0.28	22
34	BURUNDIAN	0.43	33			OTHER MIDDLE EAST	0.10	8
35	PAKISTANESE	0.37	29			NOT STATED	0.03	2
TOTAL							**100**	**7735**

1.3 Visitors categorized by sex

Gender sensitivity in tourism statistical analysis is important to pin-point various underlying gender implications on tourism planning and product development.

The results in Table 1.4 show that about 66 percent of the tourists to Uganda are male while 34 percent are female.

The implications of the results on tourist sex ratios is that, other considerations notwithstanding, planning for tourism facilities in the country will continue to be biased towards a greater number of male visitors.

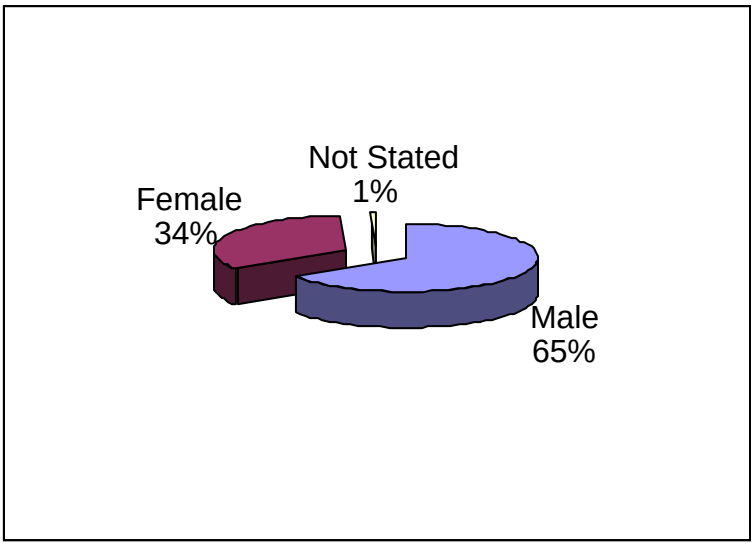
Besides the global inherent demographic and social factors, the country's prominent adventure tourism products such Gorilla tracking, water rafting on the Nile and mountain climbing of the Rwenzoris and Elgon may be responsible for the male dominance of tourist visitors to the Country.

Table 1.4:Tourists categorized by sex

Sex	Percentage	Number of Cases
Male	65.5	5068
Female	33.9	2626
Not Stated	0.5	41
Total	**100**	**7735**

The results in Table 1.4 are illustrated in Chart 1 below.

Chart 1: Tourists categorized by sex



1.4 Tourists by occupation/employment status

Occupation/employment determines the propensity to travel. The tourists' disposable incomes are usually directly related to employment, with the exception of the pension category of tourists. Occupation is also often an underlying factor behind the purpose of travel.

The results in table 1.5 show that study and business are the leading occupations among tourists to the country. Both the student and business occupations comprise about 27 percent of the tourists.
Educationalists (teachers/lecturers/professors), engineers and administrators are the second most important group of occupations of tourists to Uganda.

However, the occupation statistics should be interpreted correctly as occupation does not always explain the reason for the visitor's travel.

Table 1.5: Tourist Visitors by Occupation

	Occupation	Percentage (%)	Number of Cases
1	STUDENT	13.42	1038
2	BUSINESS	13.39	1036
3	TEACHER/LECTURER/PROFESSOR	6.70	518
4	ENGINEER	5.20	402
5	ADMINISTRATOR	5.17	400
6	BISHOP/RELIGIOUS	4.85	375
7	MEDICAL	4.27	330
8	ACCOUNTANT	2.93	227
9	CONSULTANT	2.79	216
10	SALES & MARKETING	2.65	205
11	PUBLIC SERVANT	2.56	198
12	DESIGNER	2.04	158
13	TECHNICIAN	1.73	134
14	IT	1.59	123
15	PENSIONER	1.59	123
16	BANKER	1.38	107
17	ECONOMIST/PLANNER/STATISTICIAN	1.32	102
18	LAWYER/MAGISTRATE	1.27	98
19	NGO	1.06	82
20	MEDIA/JOURNALIST/WRITER	1.05	81
21	SECRETARY/TYPIST	1.01	78
22	COMPANY EXECUTIVE	0.96	74
23	FARMER	0.93	72
24	RESEARCHER	0.85	66
25	SOCAIL WORKER	0.81	63
26	TOUR & TRAVEL WORK	0.80	62
27	CLERK	0.69	53
28	HOTELIER/HOSPITALITY	0.65	50
29	UN	0.61	47
30	AGRICULTURALIST/ORGANICIST	0.56	43
31	HEALTH/PUBLIC/ORGANISATION	0.54	42
32	ARTIST	0.53	41
33	HOUSEWIFE	0.53	41
34	TRANSPORTER	0.53	41
35	COMMUNITY/DEVT/YOUTH WORKER	0.52	40
36	DRIVER	0.48	37
37	DIPLOMAT	0.47	36
38	SCIENTIST	0.37	29
39	VOLUNTEER	0.34	26
40	PILOT/AVIATION	0.31	24
41	ELECTRICIAN	0.30	23
42	PHARMACIST	0.30	23
43	VETERINARIAN	0.30	23
44	ARCHITECT	0.27	21
45	BIOLOGIST/BOTANIST/ECOLOGIST	0.27	21
46	PILOT	0.27	21
47	HUMANITARIAN WORK	0.25	19
48	TRAINER	0.25	19
49	CARPENTER	0.23	18
50	CHEMIST	0.23	18
51	FINANCIAL MANAGEMENT	0.23	18
52	SPORTS	0.22	17
53	AGRONOMIST	0.19	15
54	AUDITOR	0.19	15

Table 1.5: Tourist Visitors by Occupation Cont'd

	Occupation	Percentage (%)	Number of Cases
55	HAIR DRESSER	0.19	15
56	CONSTRUCTION	0.18	14
57	INSURANCE	0.18	14
58	LOGISTICIAN	0.18	14
59	AID WORKER	0.17	13
61	ARTISAN	0.17	13
62	CONSELLOR	0.17	13
63	FORESTRY	0.17	13
64	GEOLOGIST/MINNER	0.17	13
65	PHOTOGRAPHER	0.16	12
66	BUILDER	0.14	11
67	CATERING	0.14	11
68	PROCUREMENT	0.13	10
69	SHOP KEEPER	0.13	10
70	ENVIRONMENTALIST	0.12	9
71	MILITARY/SECURITY/POLICEMAN	0.12	9
72	PUBLIC RELATIONS	0.12	9
73	WORLD BANK/EU	0.12	9
74	PHYSIOTHERAPIST	0.10	8
75	TAILOR	0.10	8
76	CLEARING AND FOWARDING	0.09	7
77	FILMING	0.09	7
78	HELPER	0.09	7
79	LIBRARIAN	0.09	7
80	REAL ESTATES	0.09	7
81	RECEPTIONIST	0.09	7
82	SURVEYOR	0.09	7
83	ANALYST	0.08	6
84	EVENTS MANAGER	0.08	6
85	TRANSLATOR	0.08	6
86	BEAUTICIAN	0.06	5
87	CASHIER	0.06	5
88	FOOD TECHNOLOGY	0.06	5
89	INDUSTRIALIST	0.06	5
90	PSYCHOLOGIST	0.06	5
91	TELECOMMUNICATIONS	0.06	5
	NOT STATED	1.33	103
	OTHERS	1.53	118
	TOTAL	**100**	**7735**

1.5 Tourists categorized by age-group

Age often determines the activity preferences of a tourist. It is a key factor in the tourist's choice of a tour package, nature of accommodation and demand of other services/facilities. There ought to be age considerations when planning/developing any tourism product.

The results in Table 1.6, illustrated in Chart 2, provide a general picture about the age-group distribution of tourists who come to Uganda. The statistics show that a majority of tourists to the country are aged 25-33, followed by those aged 35-44 and 45-54, respectively.

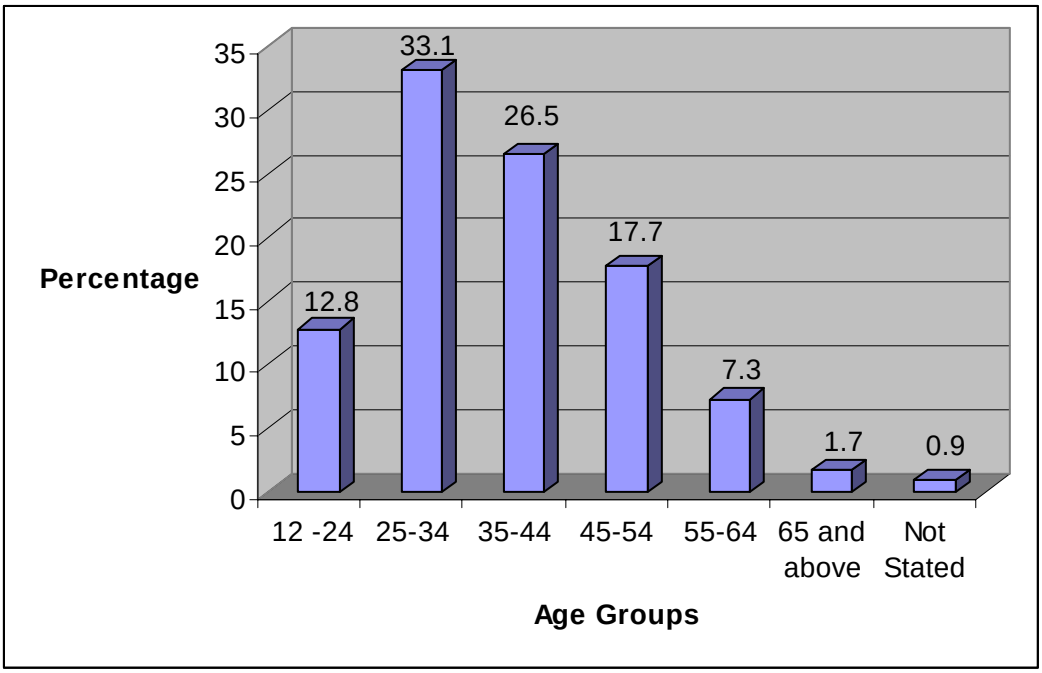
The results further indicate that while 72 percent of the tourist visitors to Uganda are aged 44 and below, only about 2 percent are aged 65 and above. Such age distribution of tourists may be significantly explained by the large share of adventure type of tourism products offered in the country.

Table 1.6: Tourist visitors by age-groups

	Age-Group	Percentage	Number of Cases
1	12-24	12.8	989
2	25-34	33.1	2559
3	35-44	26.5	2049
4	45-54	17.7	1371
5	55-64	7.3	564
6	65 and above	1.7	134
7	Not Stated	0.9	69
	Total	100	7735

Unfortunately, the dominant young tourist visitors normally undertake budget tours and short stays and may not be the target group when compared with the elderly pensioner group who stay longer and are high spenders. There is need to harmonize development of tourism products with the desired macro-level revenue focus.

Chart 2: Tourist visitors by age-groups



1.6 Tourist visitors by purpose of visit

Purpose of visit is a key concept in tourism research, planning and marketing. In particular, categorizing tourist arrivals by purpose of visit enhances the use of tourism statistics in planning of facilities and services. Numbers of holiday visitors to a country are often the main guide to infrastructure capacity considerations in protected areas and other tourism dedicated camps and resorts.

However, travel often involves more than one purpose. For instance, visitors on business, conference and other official obligations also often engage in brief but economically significant leisure activities.

Table 1.7 shows that business/conference/official activities constitute the largest share, 37.7 percent, among the five main categories of travel to Uganda. Travel to the country for holiday, leisure and vacation accounted for 25.7 percent, while 24.7 percent were visiting friends and relatives. Those that came on religious pilgrimage missions were 3.7 percent and 3.5 percent were in transit or were

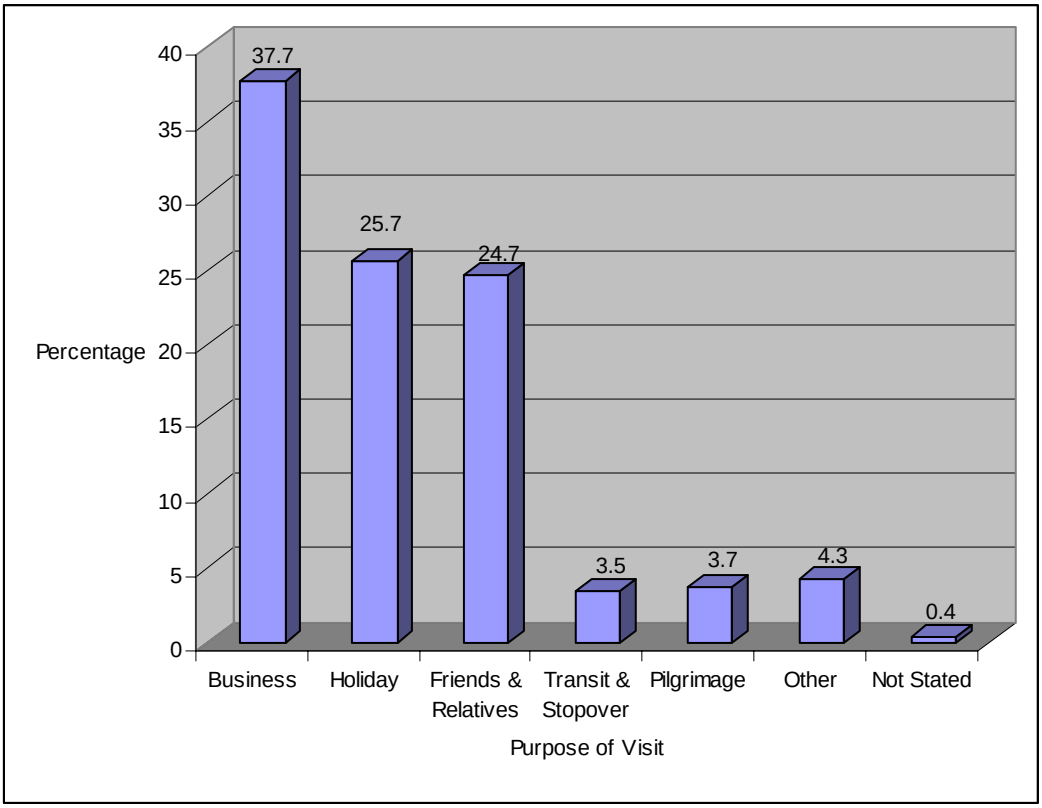
mere stop-over. Aggregation of numerous other purposes of visit comprised 5 percent. 0.4 percent did not state reason for their travel during the interview.

Table 1.7: Tourist Visitors by purpose of visit

	Purpose of Visit	Percentage	Number of Cases
1.	Business/Conference/Official	37.7	2917
2.	Holiday/Leisure/Vacation	25.7	1991
3.	Visiting Friends/Relatives	24.7	1909
4.	Transit/Stopover	3.5	267
5.	Pilgrimage/Religion	3.7	284
6.	Other Purpose	4.3	333
7.	Not Stated	0.4	34
Total		**100**	**7735**

The results on tourist visitors by purpose of visit are illustrated in Chart 3 below.

Chart 3: Tourist Visitors by purpose of visit



1.7 Repeated visits

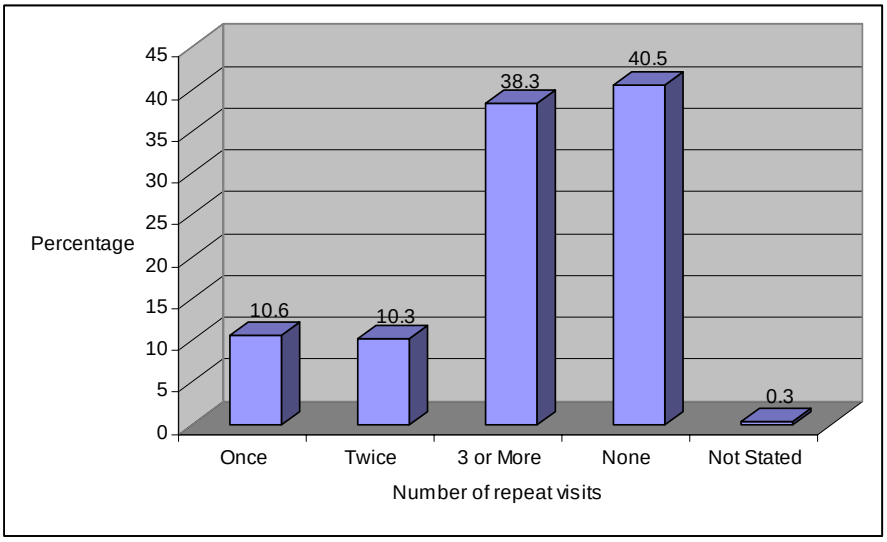
Repeated visits are important in tourism marketing and planning because they are an indicator of visitor satisfaction with the product offers, facilities and services of the destination.

The results in Table 1.8, which are also illustrated in Chart 4, show that 59.2 percent of the tourist visitors were repeat visits and 40.5 percent were visiting the country for the first time. This indicates that more than half of the country's visitors return to visit the country again. On the other hand, the highly significant percentage for first time visits is an indicator of the existing high potential of repeat visits, which could be harnessed through improved service delivery and marketing.

Table 1.8: Tourist visitors by repeated visits

	Number of Earlier Visits	Percentage	Number of Cases
1.	Once	10.6	816
2.	Twice	10.3	794
3.	Three or More	38.3	2962
4.	None	40.5	3134
5.	Not Stated	0.3	29
Total		**100.0**	**7735**

Chart 4: Tourist visitors by repeated visits



1.8 Main sources of information

Visitors were asked about their main source of information to guide future marketing strategies. Categorization of the main sources of information was based on the sources that are characteristic to Uganda.

The results in table 1.9 show that word of mouth through friends and relatives, with 59.1 percent, was the most important source of information for visitors to the country. Also worthwhile recognizing is the significance of business/Government sources and newspapers/magazines/radio, 24.9 and 24.5, respectively, as key sources of information on Uganda. The significance of these methods could be attributed to the wide publicity in the foreign media of the Presidential campaigns on various issues such as investment, tourism and AIDS.

19.1 percent of the visitors used the internet as a key source of information. This indicates that room still exists to develop the internet into a leading tourism marketing tool.

The results further indicate that travel guide books, used by 17.9 percent of the visitors, are also an important source of information for potential tourists.

Only 1.7 percent used the Uganda Tourist Board as a main source of information, which calls for review of the organization's functionality and information dissemination strategies.

Table 1.9: Tourist visitors by main sources of information on Uganda

	Main Source of Information	Percentage	Number of Cases
1.	Friends/Relatives	59.1	4569
2.	Previous Visits	35.8	2733
3.	Business/Government Sources	24.9	1932
4.	Newspapers, Magazines, Radio	24.5	1896
5.	Internet	19.1	1478
6.	Travel Guide Books	17.9	1385
7.	Travel Agent/Tour Operator	6.6	510
8.	Uganda Tourist Board	1.7	131
9.	Airlines	3.3	255
10.	Religious Contacts	0.39	30
11	Embassy/Diplomatic Offices	0.10	8
12	Others	0.97	75

1.9 Tourist visitors by length of stay

Length of stay of tourist visitors is often directly related to their expenditure and consumption of tourism services. On the other hand, tourist bed occupancy rates of accommodation facilities are directly related to the number of nights that the visitors spend in a country. It is, therefore, important to understand the average length of stay of visitors to the country in order to properly plan for provision of tourism services and facilities.

Table 1.10 shows that 10 percent of the tourist visitors spend only one day in Uganda, while 30.4 percent spend one to three nights in the country. The results also show that 25.5 percent of the tourist visitors spend between four and seven days in the country and about 20 percent of them spend between seven and fourteen nights. Those who spend fifteen to twenty-nine days are 13.4 percent and 8.3 percent spend between one and three months.

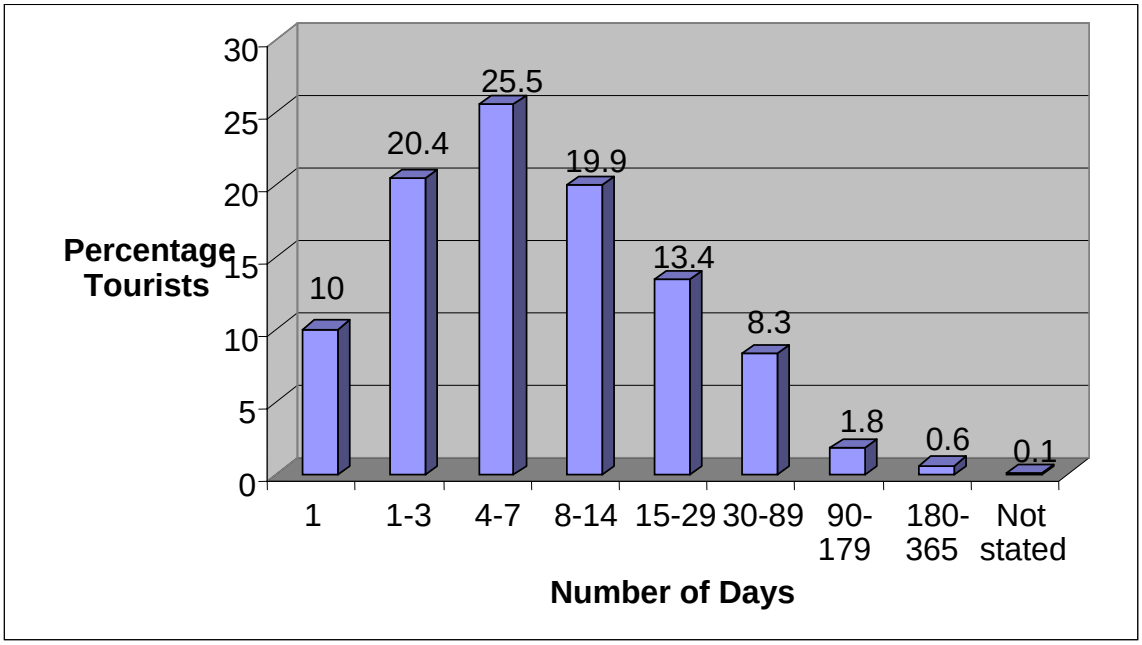
Overall, 59.3 percent of the tourist visitors spend less than a month in the country, while 10.1 percent spend between one month and 6 months. Only 0.6 percent spend more that six months in country.

Table 1.10: Tourists by length of stay

Number of Days	Percentage	Number of Cases
1	10.0	773
1 – 3	20.4	1575
4 – 7	25.5	1969
8 – 14	19.9	1536
15 – 29	13.4	1034
30 – 89	8.3	645
90 – 179	1.8	138
180 – 365	0.6	47
Not stated	0.1	18
Total	**100**	**7735**

The statistics on length of stay given in table 1.10 above are illustrated in chart 5 below.

Chart 5: Tourist visitors by length of stay



CHAPTER TWO

ANALYSIS OF RELATIONSHIPS BETWEEN GENERAL VISITOR CHARACTERISTICS

Introduction

This chapter is devoted to statistical analysis of relationships that exist between the combination of various general visitor characteristics presented in chapter one. The results presented in this chapter cover key relationships which are of great interest to tourism marketing, planning and policy making.

The relationships explored are: sex and country of usual residence; sex and age-group; sex and purpose of visit; length of stay and country of usual residence; length of stay and nationality; length of stay and age group; length of stay and purpose of visit; length of stay and repeated visits; and length of stay and port of entry.

Others are: purpose of visit and port of entry; purpose of visit and country of usual residence; purpose of visit and repeated visits; purpose of visit and nationality; and purpose of visit and age group.

2.1 Tourists by sex and country of usual residence

Further analysis of sex by country of usual residence is necessary to enable understanding of gender travel patterns in order to facilitate desirable detailed planning and appropriate product development.

The results in Table 2.1 show that Kenya had the greatest number of female visitors to the country. Australia had the highest female-to-men ratio of citizens visiting the Country.

The statistics in Table 2.1 may be used to assess gender proportions of tourists from various individual countries.

Table 2.1: Tourists categorized by country of usual residence and sex

Country of Usual Residence	Sex of Respondents			Total %-age
	Male %-age	Female %-age	Not Stated %-age	
KENYA	21.70	10.85	0.10	32.66
UNITED KINGDOM	8.33	5.70	0.06	14.10
USA	5.65	3.84	0.08	9.57
TANZANIA	3.56	1.47	0.04	5.07
SOUTHAFRICA	3.23	1.03	0.00	4.27
GERMANY	1.77	0.87	0.04	2.68
HOLLAND	1.58	1.06	0.04	2.68
INDIA	2.20	0.26	0.01	2.47
CANADA	1.13	0.92	0.01	2.06
AUSTRALIA	0.61	0.92	0.01	1.54
DRC	1.06	0.25	0.00	1.31
SWEDEN	0.74	0.50	0.01	1.25
RWANDA	0.91	0.27	0.00	1.18
ITALY	0.83	0.28	0.00	1.11
DENMARK	0.62	0.47	0.01	1.10
FRANCE	0.71	0.31	0.00	1.02
NORWAY	0.54	0.43	0.00	0.97
BELGIUM	0.47	0.35	0.00	0.81
NEWZEALAND	0.38	0.36	0.00	0.74
ZIMBABWE	0.54	0.17	0.00	0.71
SUDAN	0.52	0.17	0.01	0.70
IRELAND –UK	0.38	0.31	0.00	0.69
ISRAEL	0.49	0.18	0.00	0.67
SWITZERLAND	0.45	0.22	0.00	0.67
SPAIN	0.47	0.17	0.00	0.63
ETHIOPIA	0.43	0.16	0.00	0.58
JAPAN	0.41	0.14	0.00	0.56
NIGERIA	0.36	0.18	0.01	0.56
ZAMBIA	0.34	0.18	0.00	0.52
AUSTRIA	0.34	0.16	0.00	0.49
UNITED ARAB EMIRATES	0.40	0.06	0.00	0.47
BURUNDI	0.27	0.09	0.00	0.36
PAKISTAN	0.31	0.04	0.00	0.35
CHINA	0.22	0.10	0.00	0.32
GHANA	0.27	0.04	0.00	0.31
MALAWI	0.19	0.09	0.00	0.28
EGYPT	0.16	0.08	0.00	0.23
KOREA	0.14	0.05	0.03	0.22

Country of Usual Residence	Sex of Respondents			
	Male %-age	Female %-age	Not Stated %-age	Total %-age
SCOTLAND-UK	0.09	0.09	0.00	0.18
FINLAND	0.08	0.08	0.01	0.17
BOTSWANA	0.10	0.04	0.00	0.14
SLOVENIA	0.13	0.01	0.00	0.14
ERITREA	0.06	0.05	0.00	0.12
OMAN	0.05	0.06	0.00	0.12
POLAND	0.06	0.05	0.00	0.12
SWAZILAND	0.06	0.05	0.00	0.12
MAURITIUS	0.09	0.01	0.00	0.10
RUSSIA	0.09	0.01	0.00	0.10
SRILANKA	0.09	0.01	0.00	0.10
HONG KONG	0.06	0.03	0.00	0.09
MALAYSIA	0.08	0.01	0.00	0.09
MOZAMBIQUE	0.08	0.01	0.00	0.09
CAMEROON	0.08	0.00	0.00	0.08
LEBANON	0.06	0.01	0.00	0.08
LESOTHO	0.03	0.05	0.00	0.08
PHILIPINES	0.05	0.03	0.00	0.08
SOMALIA	0.05	0.03	0.00	0.08
CROATIA	0.04	0.03	0.00	0.06
CZECH REPUBLIC	0.04	0.03	0.00	0.06
MADAGASCAR	0.04	0.03	0.00	0.06
NAMIBIA	0.04	0.03	0.00	0.06
SINGAPORE	0.06	0.00	0.00	0.06
ARGENTINA	0.04	0.01	0.00	0.05
BRAZIL	0.05	0.00	0.00	0.05
BURKINAFASO	0.05	0.00	0.00	0.05
GAMBIA	0.05	0.00	0.00	0.05
GREECE	0.03	0.03	0.00	0.05
IVORY COAST	0.05	0.00	0.00	0.05
NEPAL	0.04	0.01	0.00	0.05
SENEGAL	0.04	0.01	0.00	0.05
SEYCHELES	0.03	0.03	0.00	0.05
TUNISIA	0.01	0.04	0.00	0.05
NOT STATED	0.01	0.01	0.01	0.04
OTHERS	0.83	0.34	0.01	1.19
TOTAL	66	34	1	100

2.2 Tourists by sex and age group

The relationship between sex and age group among tourists that visit Uganda has been explored in the attempt to understand the joint influence of both factors on tourist travel patterns to the country.

Table 2.2 shows that the largest number of both male and female tourists to Uganda are aged between 25 and 34. A majority of male tourist visitors, 20.5 percent, are aged 25 to 34, while a majority of females, 12.5 percent, are also of the same age group.

The results also show that the second largest number of males and females, 18.3 percent and 8.1 percent, respectively were aged 35-44.

On the other hand, well as the third largest number of males, 13.2 percent, were aged 45-54, the third largest number of females, 6.6 percent, were aged 12-24.

The results revealed that a larger proportion of young females than males aged between 12 and 24 visit Uganda; while a larger proportion of males than females aged 45-54 visit the country.

Table 2.2: Tourists by sex and age group

Age Group	Sex						Total	
	Male		Female		Not Stated			
	%-age	Number of Cases	%-age	Number of Cases	%-age	Number of Cases	%-age	Number of Cases
12-24	6.1	472	6.6	511	6.6	5	12.8	988
25-34	20.5	1586	12.5	968	12.5	5	33.1	2559
35-44	18.3	1413	8.1	628	8.1	8	26.5	2049
45-54	13.2	1020	4.4	338	4.4	13	17.7	1371
55-64	5.7	439	1.6	122	1.6	3	7.3	564
65 and above	1.2	94	0.5	36	0.5	4	1.7	134
Not stated	0.5	39	0.2	19	0.2	12	0.9	70
Total	**65.5**	**5063**	**33.9**	**2622**	**33.9**	**50**	**100.0**	**7735**

2.3 Tourists by sex and purpose of visit

The analysis of sex by purpose of visit is intended to bring out underlying relationship, if any, between gender and reasons for visiting the country.

The results in table 2.3 show that unlike males who visit the country mainly for business, conferences and other official work, 29 percent, a majority of females, 22.0 percent, visit the country for holiday, leisure, vacation and friends and relatives.

The results also show that the male sex who visit the country are greater than the females for all categories of purpose of visit.

Table 2.3: Tourists by sex and purpose of visit

Purpose of Visit	Sex						Total	
	Male		Female		Not Stated			
	%-age	Number Of Cases	%-age	Number Of Cases	%-age	Number Of Cases	%-age	Number Of Cases
Business/Conference/Official	29.3	2265	8.2	634	0.2	18	37.7	2917
Holiday/Leisure/Vacation	14.6	1129	11.0	852	0.1	10	25.7	1991
Visiting Friends/Relatives	13.5	1048	11.0	854	0.1	6	24.7	1908
Transit/Stopover	2.7	212	0.7	55	0.0	0	3.5	267
Pilgrimage/Religion	2.6	198	1.1	85	0.0	1	3.7	284
Other	2.5	192	1.8	139	0.0	2	4.3	333
Not Stated	0.3	22	0.1	7	0.1	6	0.5	35
Total	**65.5**	**5066**	**33.9**	**2626**	**0.6**	**43**	**100**	**7735**

2.4 Tourist length of stay by country of usual residence

Analysis of length of stay by country of usual residence is critical due to its direct applicable linkages to the design of marketing strategies and expenditure projection.

From the results in Table 2.4, it is possible to capture statistics on average length of stay by country, which data is valuable particularly for planning product packages and tour operations. For instance, the results in Table 2.4 indicate that a majority of tourist visitors from Kenya, the leading source market, spend only 1-

3 nights. Also by implication from the statistics in the table, only 4 percent spend 2-3 nights in the country since 6.2 percent spend one night.

It is worthwhile noting that a majority of tourist visitors from the other most important niche' markets of the United Kingdom and USA spend an average of 8-14 nights in the country.

Table 2.4: Tourist length of stay by country of usual residence

Country of usual Residence	Number of Nights Spent/Percentage									Total %-age
	1	1-3	4-7	8-14	15-29	30-89	90-179	180-365	Not Stated	
KENYA	6.2	10.2	8.4	3.5	2.2	1.7	0.4	0.1	0.1	32.7
UNITED KINGDOM	0.4	1.4	2.9	3.7	3.3	1.7	0.5	0.1	0.1	14.1
USA	0.4	1.2	2.2	2.8	1.6	1.1	0.2	0.1	0.0	9.6
TANZANIA	0.7	1.4	1.6	0.7	0.3	0.2	0.1	0.0	0.0	5.1
SOUTHAFRICA	0.3	1.1	1.5	0.7	0.4	0.2	0.0	0.1	0.0	4.3
GERMANY	0.1	0.3	0.5	0.7	0.7	0.3	0.1	0.0	0.0	2.7
HOLLAND	0.0	0.3	0.5	0.6	0.9	0.3	0.1	0.0	0.0	2.7
INDIA	0.1	0.5	0.6	0.4	0.4	0.3	0.1	0.1	0.0	2.5
CANADA	0.1	0.3	0.5	0.6	0.3	0.1	0.0	0.0	0.0	2.1
AUSTRALIA	0.0	0.1	0.4	0.5	0.3	0.1	0.0	0.0	0.0	1.5
DRC	0.3	0.4	0.3	0.1	0.1	0.1	0.0	0.0	0.0	1.3
SWEDEN	0.0	0.1	0.2	0.4	0.2	0.3	0.0	0.0	0.0	1.3
RWANDA	0.4	0.3	0.3	0.1	0.1	0.0	0.0	0.0	0.0	1.2
ITALY	0.0	0.1	0.4	0.2	0.2	0.1	0.1	0.0	0.0	1.1
DENMARK	0.1	0.1	0.2	0.3	0.3	0.2	0.0	0.0	0.0	1.1
FRANCE	0.1	0.2	0.2	0.2	0.2	0.1	0.0	0.0	0.0	1.0
NORWAY	0.1	0.2	0.2	0.3	0.1	0.1	0.0	0.0	0.0	1.0
BELGIUM	0.0	0.1	0.1	0.2	0.3	0.0	0.0	0.0	0.0	0.8
NEWZEALAND	0.0	0.0	0.1	0.5	0.1	0.1	0.0	0.0	0.0	0.7
ZIMBABWE	0.0	0.1	0.3	0.2	0.1	0.0	0.0	0.0	0.0	0.7
SUDAN	0.1	0.1	0.2	0.1	0.1	0.1	0.0	0.0	0.0	0.7
IRELAND	0.0	0.1	0.2	0.2	0.1	0.1	0.0	0.0	0.0	0.7
ISRAEL	0.0	0.1	0.2	0.2	0.2	0.1	0.0	0.0	0.0	0.7
SWITZERLAND	0.1	0.1	0.2	0.1	0.1	0.1	0.0	0.0	0.0	0.7
SPAIN	0.0	0.0	0.1	0.3	0.1	0.1	0.0	0.0	0.0	0.6
ETHIOPIA	0.0	0.1	0.2	0.1	0.0	0.1	0.0	0.0	0.0	0.6
JAPAN	0.0	0.1	0.2	0.2	0.0	0.1	0.0	0.0	0.0	0.6
NIGERIA	0.0	0.1	0.3	0.1	0.1	0.0	0.0	0.0	0.0	0.6
ZAMBIA	0.0	0.1	0.2	0.1	0.0	0.0	0.0	0.0	0.0	0.5
AUSTRIA	0.0	0.0	0.1	0.1	0.1	0.1	0.0	0.0	0.0	0.5
UNITED ARAB EMIRATES	0.1	0.1	0.2	0.0	0.0	0.1	0.0	0.0	0.0	0.5
OTHERS	0.4	1.1	1.9	1.5	0.7	0.5	0.1	0.1	0.0	6.2
Total	**10.0**	**20.4**	**25.5**	**19.9**	**13.4**	**8.3**	**1.8**	**0.6**	**0.2**	**100**

*n = 7735

2.5 Tourist length of stay by nationality

Tourism analysis of length of stay by nationality is aimed at capturing ethnicity linkages to the visitors' length of stay. Statistics from the combination of nationality and length of stay may facilitate planning for nationality related tastes and preferences of visitors.

Well as the results in Table 2.5 may be interpreted to be generally similar to those of nationality by country of usual residence in Table 2.4 above, there are a number of significant differences.

For instance, it can be noted from the comparison of the results in Tables 2.4 and 2.5 that 3.9 percent of the visitors from Kenya are actually not Kenyans by nationality. By similar analogy it can be noted that 0.9 percent of the British who come to visit Uganda do not usually reside in the United Kingdom. Also, 0.9 percent of the visitors from Tanzania are not of Tanzanian nationality.

Table 2.5: Tourist length of stay by nationality

Nationality	Number of Nights Spent / Percentage									Total
	1	1-3	4-7	8-14	15-29	30-89	90-179	180-365	Not Stated	
KENYAN	5.6	8.9	7.3	3.1	2.0	1.6	0.3	0.1	0.1	28.8
BRITISH	0.8	1.8	3.4	3.8	3.0	1.5	0.5	0.1	0.1	15.0
AMERICAN	0.5	1.4	2.3	2.7	1.6	0.9	0.2	0.1	0.0	9.7
TANZANIAN	0.6	1.2	1.4	0.5	0.2	0.2	0.1	0.0	0.0	4.3
SOUTHAFRICAN	0.3	0.9	1.2	0.6	0.4	0.2	0.0	0.1	0.0	3.7
INDIAN	0.2	0.9	0.8	0.5	0.4	0.4	0.1	0.1	0.0	3.3
DUTCH	0.1	0.4	0.7	0.6	0.9	0.3	0.1	0.0	0.0	3.1
GERMAN	0.1	0.4	0.5	0.7	0.6	0.3	0.1	0.0	0.0	2.9
CANADIAN	0.1	0.4	0.7	0.7	0.3	0.2	0.0	0.0	0.0	2.3
AUSTRALIAN	0.0	0.1	0.5	0.6	0.3	0.1	0.0	0.0	0.0	1.7
UGANDAN	0.0	0.2	0.2	0.3	0.3	0.3	0.1	0.0	0.0	1.5
CONGOLESE	0.3	0.4	0.3	0.1	0.1	0.1	0.0	0.0	0.0	1.4
SWEDISH	0.1	0.1	0.3	0.4	0.2	0.2	0.0	0.0	0.0	1.3
ITALIAN	0.1	0.1	0.4	0.2	0.2	0.1	0.1	0.0	0.0	1.2
FRENCH	0.1	0.3	0.2	0.2	0.2	0.1	0.0	0.0	0.0	1.2
DENISH	0.0	0.1	0.2	0.3	0.2	0.1	0.0	0.0	0.0	1.1
SUDANESE	0.1	0.2	0.3	0.2	0.2	0.1	0.0	0.0	0.0	1.0
RWANDESE	0.3	0.3	0.2	0.1	0.1	0.0	0.0	0.0	0.0	1.0
NORWAGIAN	0.1	0.2	0.2	0.3	0.2	0.1	0.0	0.0	0.0	1.0
NEWZEALANDER	0.0	0.0	0.2	0.5	0.1	0.1	0.0	0.0	0.0	0.9
IRISH	0.0	0.1	0.3	0.2	0.1	0.1	0.0	0.0	0.0	0.9
BELGIAN	0.1	0.1	0.2	0.2	0.2	0.0	0.0	0.0	0.0	0.8
ISRAELITE	0.0	0.1	0.2	0.2	0.2	0.1	0.0	0.0	0.0	0.7
NIGERIAN	0.0	0.1	0.3	0.1	0.1	0.0	0.0	0.0	0.0	0.7
SPANISH	0.0	0.0	0.1	0.3	0.1	0.1	0.0	0.0	0.0	0.7
ETHIOPIAN	0.0	0.1	0.2	0.2	0.1	0.1	0.0	0.0	0.0	0.6
ZIMBABWEAN	0.0	0.1	0.2	0.1	0.1	0.0	0.0	0.0	0.0	0.6
JAPANESE	0.0	0.1	0.1	0.3	0.0	0.1	0.0	0.0	0.0	0.6
SWISS	0.0	0.0	0.1	0.1	0.1	0.1	0.0	0.0	0.0	0.6
AUSTRIAN	0.1	0.1	0.1	0.1	0.1	0.1	0.0	0.0	0.0	0.5
SOMALIAN	0.0	0.0	0.0	0.1	0.1	0.2	0.0	0.0	0.0	0.5
OTHERS	0.4	1.2	2.2	1.4	0.8	0.5	0.1	0.1	0.0	6.7
Total	**10.0**	**20.4**	**25.5**	**19.9**	**13.4**	**8.3**	**1.8**	**0.6**	**0.2**	**100.0**

2.6 Tourist length of stay by age group

The relationship between length of stay and age group has been explored in order to understand possible linkage between both these attributes. The influence of age on choice of tour package and other services has already been pointed out in Section 1.6.

Well as it was shown in Table 1.6 that a majority of tourist to Uganda are within the groups 25-34, 35-44 and 45-54, Table 2.6 below shows that most of these tourists, 8.4 percent, 7.1 percent and 5.0 percent, respectively, spend an average of 4-7 days in the country.

It can also be seen from the results in Table 2.6 that there are no visitors to Uganda aged 65 and above who spend more than 89 days (three months) in the country.

Table 2.6: Tourist length of stay by age group

Age Group	Number of days and Corresponding Percentages									Total
	1	1-3	4-7	8-14	15-29	30-89	90-179	180-365	Not Stated	
12-24	0.6	1.8	2.3	2.5	2.4	2.3	0.8	0.2	0.1	**12.8**
25-34	3.4	6.7	8.4	6.7	4.4	2.8	0.5	0.2	0.0	**33.1**
35-44	3.2	6.4	7.1	4.9	2.9	1.6	0.3	0.1	0.1	**26.5**
45-54	2.2	3.9	5.0	3.4	2.1	0.8	0.1	0.1	0.0	**17.7**
55-64	0.5	1.2	2.1	1.9	1.0	0.4	0.1	0.0	0.0	**7.3**
65 and above	0.1	0.2	0.4	0.4	0.4	0.2	0.0	0.0	0.0	**1.7**
Not Stated	0.1	0.1	0.1	0.2	0.1	0.1	0.0	0.0	0.1	**0.8**
Total	**10.0**	**20.4**	**25.5**	**19.9**	**13.4**	**8.3**	**1.8**	**0.6**	**0.2**	**100.0**

2.7 Tourist length of stay by purpose of visit

Analysis of tourists length of stay by purpose of visit is important because it provides insight into reasons for various durations of stay.

The results in Table 2.7 show that a majority (7.8 percent) of the visitors on holiday stay in the country for an average 8-14 days, which indicates that the destination is beginning to attract large numbers of holiday visitors who spend the desired length of stay. More effort is, however, required to motivate holiday visitors spending 4-7 days (6.1 percent) to also undertake longer packages of 8-14 packages.

The results further indicate that a majority (11.8 percent) of the visitors on business, conference and other official work spend 4-7 days in the country.

The majority (5.2 percent) of visiting friends and relatives spend 1-3 and 4-7 days.

Most of the visitors on stop-over spend only one day, while those on pilgrimage spend 8-14 days.

Table 2.7: Tourist length of stay by purpose of visit

Purpose of Visit	Length of Stay									Total
	1	1-3	4-7	8-14	15-29	30-89	90-179	180-365	Not Stated	
Holiday/Vacation/Leisure	0.7	3.5	6.1	7.8	4.8	2.4	0.4	0.1	0.1	**25.7**
Business/Conference/Official	4.2	9.3	11.8	5.8	3.3	2.4	0.5	0.3	0.1	**37.8**
Visiting Friends/Relatives	2.7	5.2	5.2	4.4	3.9	2.6	0.5	0.1	0.0	**24.7**
Transit/Stopover	1.7	0.8	0.4	0.2	0.2	0.1	0.0	0.0	0.0	**3.5**
Pilgrimage/Religion	0.1	0.6	0.8	1.1	0.5	0.3	0.1	0.0	0.0	**3.7**
Other	0.4	0.8	1.0	0.5	0.6	0.6	0.3	0.1	0.0	**4.3**
Not Stated	0.0	0.1	0.1	0.1	0.0	0.0	0.0	0.0	0.0	**0.4**
Total	**10.0**	**20.4**	**25.4**	**19.9**	**13.4**	**8.3**	**1.8**	**0.6**	**0.3**	**100.0**

2.8: Tourist length of stay by repeated visits

The relationship between tourist length of stay and repeated visits may be used to guide projection of tourist numbers and corresponding durations based on travel elasticity considerations for the various categories of repeated visits.

Table 2.8 shows that a majority (3.1 percent) of the second time visitors, referred to as “Once” in the table, spend an average of 4-7 days. The majority (2.7 percent) of the third time (twice-repeat) visitors also spend an average of 4-7 days. The majority (9.5 percent) of those who have visited the country for at least four times (three or more times before) on average stay for 1-3 days. Most (10.5 percent) of the first time visitors (None –repeat) spend 4-7 days in the country.

It should be noted that a majority of the visitors who spend one day in the country are three or more times repeat visitors.

Table 2.8: Tourist length of stay by repeated visits

Repeated Visits	Length of Stay									Total
	1	1-3	4-7	8-14	15-29	30-89	90-179	180-365	Not Stated	
Once	0.9	2.3	3.1	2.0	1.3	0.7	0.1	0.0	0.0	**10.5**
Twice	1.0	2.4	2.7	2.2	1.0	0.8	0.1	0.1	0.0	**10.3**
Three or More	5.6	9.5	8.9	5.9	4.5	3.1	0.5	0.2	0.1	**38.3**
None	2.6	6.2	10.5	9.7	6.5	3.7	1.0	0.3	0.1	**40.5**
Not Stated	0.0	0.1	0.1	0.1	0.0	0.0	0.0	0.0	0.1	**0.4**
Total	**10.0**	**20.3**	**25.4**	**19.8**	**13.4**	**8.3**	**1.8**	**0.6**	**0.3**	**100.0**

2.9 Tourist length of stay by Port of entry

Port of entry by length of stay statistics in Table 2.9 are an indicator of the relative importance of each of Uganda's main points of entry/exit for tourism purposes. Entebbe is the most important tourist entry/exit point, handling 55.9 percent of the tourist arrivals, followed by Malaba with 23.9 percent of the tourist arrivals.

The results show that a majority, 14.3 percent and 6.0 percent, of the visitors passing through Entebbe and Malaba, respectively, stay in the country for an average of 4-7 days. The majority (5.1 percent) of visitors using Busia spend in the country an average of 1-3 and 4-7 days, as indicated in Table 2.9.

Table 2.9: Tourist length of stay and Port of entry

Port of Entry	Length of Stay									Total
	1	1-3	4-7	8-14	15-29	30-89	90-179	180-365	Not Stated	
ENTEBBE	3.8	9.9	14.3	12.3	9.2	5.1	0.8	0.4	0.1	**55.9**
MALABA	2.7	5.3	6.0	4.7	2.4	1.9	0.7	0.1	0.1	**23.9**
BUSIA	3.5	5.1	5.1	2.9	1.8	1.3	0.3	0.1	0.1	**20.1**
Total	**10.0**	**20.4**	**25.5**	**19.9**	**13.4**	**8.3**	**1.8**	**0.6**	**0.2**	**100.0**

2.10 Tourists by purpose of visit and Port of entry

The analysis of tourists by purpose of visit and Port of entry is facilitates understanding of tourist arrivals categorized by reasons for travel. The statistics obtained as in Table 2.10 are usually useful when planning for facilities and services for the holiday, vacation and leisure visitors at the key Ports of entry.

Table 2.10 shows that a majority (11.7 percent) of the visitors on holiday, vacation and leisure use Entebbe airport, while 9.2 percent and 4.8 percent of the holiday, vacation and leisure visitors use Malaba and Busia, respectively.

Most visitors on business, conferences and other official work (28.3 percent) also use Entebbe International Airport.

Entebbe International Airport is also the main point of entry those visiting friends and relatives, those on transit and stop-over and those on pilgrimage.

In general, most visitors passing through Entebbe Airport are on business/conference/official work, while most of those passing through Busia are visiting friends and relatives and most of those Malaba are on holiday/vacation/leisure.

Table 2.10: Tourist purpose of visit by Port of entry

Purpose of Visit	Port of Entry			Total
	Busia	Entebbe	Malaba	
Holiday/Vacation/Leisure	4.8	11.7	9.2	**25.7**
Business/Conference/Official	4.4	28.3	5.0	**37.7**
Visiting Friends/Relatives	7.6	10.8	6.3	**24.7**
Transit/Stopover	0.9	1.6	1.0	**3.5**
Pilgrimage/Religion	0.8	1.7	1.2	**3.7**
Other	1.6	1.6	1.2	**4.3**
Total	**20.1**	**55.9**	**23.9**	**100.0**

2.11 Tourists by purpose of visit and country of usual residence

Analyzing the relationship between purpose of visit and country of usual residence enables breaking down visitors by reason of travel and country of residence. By using the results in Table 2.11 it is possible to proportionately pin down visitors from a particular country by purpose of travel.

The results show that a majority (13.6 percent) of visitors from Kenya come for business, conferences and other official work.

Like for Kenya, the majority of visitors from the USA, Tanzania and South Africa come on business travel.

On the other hand, it is worthwhile noting that among key tourist niche' markets, a majority of visitors from the United Kingdom, German, Holland, Canada and Australia visit the country for holiday, vacation and leisure.

Table 2.11: Tourists by purpose of visit and country of usual residence

Country of Usual Residence	Purpose of Visit							Total
	Holiday/ Vacation	Business /Official	Friends/ relatives	Transit/ Stopover	Pilgrimage /Religion	Other	Not Stated	
KENYA	3.7	13.6	11.1	0.8	1.5	1.8	0.1	32.7
UNITED KINGDOM	6.2	3.5	3.3	0.2	0.4	0.5	0.0	14.1
USA	2.8	3.1	2.2	0.2	0.9	0.4	0.1	9.6
TANZANIA	0.6	2.3	1.4	0.2	0.1	0.5	0.0	5.1
SOUTHAFRICA	0.6	3.1	0.3	0.1	0.0	0.1	0.0	4.3
GERMANY	1.1	0.7	0.6	0.1	0.0	0.1	0.0	2.7
HOLLAND	1.3	0.6	0.6	0.0	0.0	0.1	0.0	2.7
INDIA	0.5	1.1	0.8	0.0	0.0	0.0	0.0	2.5
CANADA	1.0	0.4	0.5	0.1	0.0	0.1	0.0	2.1
AUSTRALIA	1.2	0.1	0.2	0.0	0.0	0.0	0.0	1.5
DRC	0.1	0.4	0.1	0.7	0.0	0.0	0.0	1.3
SWEDEN	0.4	0.4	0.3	0.0	0.0	0.1	0.0	1.2
RWANDA	0.1	0.4	0.2	0.4	0.0	0.0	0.0	1.2
ITALY	0.3	0.5	0.2	0.0	0.0	0.1	0.0	1.1
DENMARK	0.3	0.3	0.4	0.0	0.0	0.0	0.0	1.1
FRANCE	0.3	0.5	0.2	0.1	0.0	0.0	0.0	1.0
NORWAY	0.4	0.3	0.2	0.1	0.0	0.1	0.0	1.0
BELGIUM	0.3	0.2	0.1	0.1	0.0	0.0	0.0	0.8
NEWZEALAND	0.6	0.0	0.1	0.0	0.1	0.0	0.0	0.7
ZIMBABWE	0.0	0.5	0.1	0.0	0.0	0.0	0.0	0.7
SUDAN	0.1	0.4	0.2	0.1	0.0	0.0	0.0	0.7
IRELAND –UK	0.3	0.2	0.1	0.0	0.0	0.0	0.0	0.7
ISRAEL	0.4	0.2	0.1	0.0	0.0	0.0	0.0	0.7
SWITZERLAND	0.2	0.3	0.1	0.0	0.0	0.0	0.0	0.7
SPAIN	0.5	0.1	0.1	0.0	0.0	0.0	0.0	0.6
ETHIOPIA	0.1	0.4	0.1	0.0	0.0	0.0	0.0	0.6
JAPAN	0.4	0.1	0.1	0.0	0.0	0.0	0.0	0.6
NIGERIA	0.0	0.3	0.1	0.0	0.1	0.0	0.0	0.6
ZAMBIA	0.1	0.3	0.1	0.0	0.0	0.0	0.0	0.5
AUSTRIA	0.2	0.1	0.1	0.0	0.0	0.0	0.0	0.5
UNITED ARAB EMIRATES	0.1	0.3	0.1	0.0	0.0	0.0	0.0	0.5
OTHERS	1.5	3.2	0.9	0.2	0.2	0.2	0.1	6.2
Total	**25.7**	**37.7**	**24.7**	**3.5**	**3.7**	**4.3**	**0.4**	**100.0**

2.12 Tourists by purpose of visit and nationality

Table 2.12 shows that the main reason for visiting the country by a majority of the Kenyan nationals is business/conferences/other official (11.5 percent) and friends and relatives (10.3 percent).

The majority of British, Dutch, Germans, Canadians, Australians and Ugandans living abroad are on holiday; while Americans, Tanzanians and South Africans

are on business/conference/other work. The results in table 2.12 can be read for corresponding statistics on other countries.

Table 2.12: Tourists by purpose of visit and nationality

Nationality	Purpose of Visit							Total
	Holiday/ Vacation	Business /Official	Friends/ relatives	Transit/ Stopover	Pilgrimage /Religion	Other	Not Stated	
KENYAN	3.2	11.5	10.3	0.7	1.3	1.7	0.1	28.8
BRITISH	6.2	4.6	2.8	0.2	0.4	0.6	0.0	15.0
AMERICAN	2.9	3.2	2.0	0.3	1.0	0.3	0.1	9.7
TANZANIAN	0.3	1.9	1.3	0.2	0.1	0.5	0.0	4.3
SOUTHAFRICAN	0.5	2.7	0.2	0.1	0.0	0.1	0.0	3.7
INDIAN	0.6	1.6	1.0	0.1	0.1	0.0	0.0	3.3
DUTCH	1.4	0.8	0.6	0.1	0.0	0.1	0.0	3.1
GERMAN	1.2	0.8	0.7	0.1	0.0	0.1	0.0	2.9
CANADIAN	1.1	0.6	0.5	0.1	0.1	0.1	0.0	2.3
AUSTRALIAN	1.2	0.2	0.3	0.0	0.0	0.0	0.0	1.7
UGANDAN	0.3	0.2	0.9	0.0	0.0	0.0	0.0	1.5
CONGOLESE	0.0	0.5	0.1	0.7	0.0	0.0	0.0	1.4
SWEDISH	0.4	0.4	0.3	0.0	0.0	0.1	0.0	1.3
ITALIAN	0.4	0.5	0.2	0.0	0.0	0.1	0.0	1.2
FRENCH	0.4	0.5	0.2	0.1	0.0	0.0	0.0	1.2
DENISH	0.4	0.3	0.3	0.0	0.0	0.0	0.0	1.1
SUDANESE	0.1	0.5	0.3	0.1	0.0	0.0	0.0	1.0
RWANDESE	0.1	0.3	0.3	0.3	0.0	0.0	0.0	1.0
NORWAGIAN	0.4	0.4	0.1	0.1	0.0	0.1	0.0	1.0
NEWZEALANDER	0.6	0.1	0.1	0.0	0.1	0.1	0.0	0.9
IRISH	0.5	0.2	0.1	0.0	0.0	0.0	0.0	0.9
BELGIAN	0.3	0.2	0.1	0.1	0.0	0.0	0.0	0.8
ISRAELITE	0.4	0.2	0.1	0.0	0.0	0.0	0.0	0.7
NIGERIAN	0.0	0.4	0.1	0.0	0.1	0.0	0.0	0.7
SPANISH	0.5	0.1	0.1	0.0	0.0	0.0	0.0	0.7
ETHIOPIAN	0.1	0.4	0.1	0.0	0.0	0.0	0.0	0.6
ZIMBABWEAN	0.0	0.5	0.1	0.0	0.0	0.0	0.0	0.6
JAPANESE	0.4	0.1	0.1	0.0	0.0	0.0	0.0	0.6
SWISS	0.2	0.2	0.1	0.0	0.0	0.0	0.0	0.6
AUSTRIAN	0.2	0.1	0.1	0.0	0.0	0.0	0.0	0.5
SOMALIAN	0.1	0.0	0.3	0.0	0.0	0.0	0.0	0.5
OTHER	1.4	3.7	0.9	0.2	0.2	0.2	0.1	6.7
Total	**25.7**	**37.7**	**24.7**	**3.5**	**3.7**	**4.3**	**0.4**	**100.0**

2.13 Tourists by purpose of visit and repeated visits

The results in Table 2.13 indicate that a majority of those on first (3.7 percent), second (4.0 percent) and at least thrice time (18.1 percent) repeat visits are on business/ conference/official work.

The results also show that a majority of first time visitors (16.5 percent) are on holiday. Other useful interpretation of the results includes, for instance, that 3.1 percent of the 16.5 percent will return for a repeat visit. Based on reliable tourist arrival data estimates of categories of various repeat visits may be derived.

Table 2.13: Tourists by purpose of visit and repeated visits

Repeated Visits	Purpose of Visit							Total
	Holiday/ Vacation	Business /Official	Friends/ relatives	Transit/ Stopover	Pilgrimage /Religion	Other	Not Stated	
Once	3.1	3.7	2.7	0.3	0.4	0.3	0.0	10.6
Twice	2.0	4.0	3.0	0.3	0.4	0.5	0.0	10.3
Thrice or More	4.1	18.1	11.0	2.2	1.2	1.5	0.1	38.3
None	16.5	11.9	7.8	0.6	1.6	1.9	0.1	40.5
Not Stated	0.1	0.0	0.1	0.0	0.0	0.0	0.4	0.6
Total	**25.7**	**37.7**	**24.7**	**3.5**	**3.7**	**4.3**	**0.7**	**100**

2.14 Tourists by purpose of visit and age group

The statistics in Table 2.14 indicate that most of the tourist visitors in the age groups 25-34, 35-44, 45-54 and 55-64 visit the country for business.

The majority of visitors aged 12-24 are on holiday/vacation/leisure. However, tourists aged 25-34 comprise the majority of the visitors on holiday/vacation/leisure.

There is equal distribution of visitors aged 65 and above for holiday, business and friends/relatives categories.

Table 2.14: Tourists by purpose of visit and age-group

Age-Group	Purpose of Visit							Total
	Holiday/ Vacation	Business /Official	Friends/ relatives	Transit/ Stopover	Pilgrimage /Religion	Other	Not Stated	
12-24	6.0	1.3	3.4	0.3	0.6	1.1	0.1	**12.8**
25-34	9.7	11.6	8.4	1.3	0.9	1.2	0.1	**33.1**
35-44	4.6	12.4	6.7	1.1	0.8	0.7	0.1	**26.5**
45-54	3.2	8.5	3.9	0.4	0.7	0.8	0.1	**17.7**
55-64	1.5	3.0	1.6	0.2	0.5	0.3	0.0	**7.3**
65 and Above	0.5	0.5	0.5	0.0	0.1	0.1	0.0	**1.7**
Not Stated	0.1	0.3	0.1	0.0	0.0	0.0	0.8	**1.4**
Total	**25.8**	**37.7**	**24.7**	**3.5**	**3.7**	**4.3**	**1.0**	**100.0**

2.15 Tourists by repeated visits and age-group

The results in Table 2.15 show that a majority of visitors on first (No repeat), second and third visits are aged 25-34. The majority of those who have visited at least four times (thrice or more repeat visits) are aged 35-44.

A majority of the visitors aged 12-24 are first time visitors to the country.

Table 2.15: Tourists by repeated visits and age-group

Repeated Visits	Age Group of Tourists							Total
	12-24	25-34	35-44	45-54	55-64	65 and Above	Not Stated	
Once	1.5	3.9	2.6	1.6	0.9	0.1	0.0	**10.6**
Twice	0.9	3.5	2.9	2.0	0.7	0.2	0.1	**10.3**
Thrice or More	2.2	11.4	12.3	8.2	3.3	0.7	0.2	**38.3**
None	8.3	14.3	8.7	5.9	2.5	0.6	0.3	**40.6**
Not Stated	0.0	0.1	0.0	0.0	0.0	0.0	0.3	**0.5**
Total	**12.8**	**33.1**	**26.5**	**17.7**	**7.3**	**1.7**	**1.0**	**100.0**

CHAPTER THREE

TOURISTS TRAVEL BEHAVIOUR PATTERNS

Introduction

This chapter concentrates on analysis of characteristics of the travel behavior patterns of tourists who visit Uganda. The travel behavior patterns investigated during the survey included providing statistical information on any accompanying visitors, stating other African countries visited/considered for a visit during the trip, naming organized tours taken and places stayed in, including giving reasons for not taking any tours. Other inquiries were on whether the visitor was a fully independent traveler or came under a package tour arrangement.

3.1 Information on accompanying visitors

The information on accompanying visitors is intended to provide insight into group and family travel patterns. Such information is important in planning of tourist accommodation facilities. The information is also valuable for product development and planning/design of other tourist services.

The results in Table 3.1 show that a majority of the country's visitors (56.2 percent) are single travelers, while 43.4 percent are accompanied. By implication, therefore, it may, for instance, be advisable to under-pin the concept of expecting majority single travelers when designing a tourist resort/camp.

Table 3.1: Tourist visitors categorized by single and accompanied status

	Single / accompanied	Percentage	Number of Cases
1.	Single	56.2	4345
2.	Accompanied	43.4	3359
3.	Not Stated	0.40	31
Total		**100.0**	**7735**

However, tourism planners are also often interested in further classification of the accompanying visitors in order to understand their common relationships.

Understanding the relationships is useful particularly in design of tourist facilities and other products.

The results in Table 4.2 show that 10.6 percent of the visitors to Uganda were accompanied by their spouses, 5.0 percent by family children and 4.8 percent by other family adults. It should be noted that on the whole, only about 20 percent of the visitors travel with a family member.

On the other hand, the results show that 86.4 percent of the visitors were accompanied by adults that are not family members and 1.8 percent were accompanied by non-family children.

On average (mode), only one person from each of the categories accompanied the visitors. However, it can be imputed from the total number of accompanied respondents (3,791) and the total number of accompanying visitors (16,553) that the accompanied tourist visitors were on average accompanied by five other visitors.

The high ratio of five people traveling with each visitor may be attributed to the large groups of students who visit the country during vacation, particularly from the United Kingdom.

Table 3.2: Categories of tourists by type of accompanying visitors

Family Members		**Percentage**	**Number of Cases**	**Average Number of Accompanying Visitors (mode)**
1.	Spouse Partners	10.6	823	1
2.	Family Children	5.0	385	1
3.	Other Family Adults	4.8	369	1
Cases accompanied by family members		**20.4**	**1577**	**n/a**
Non-Family Members				
4.	Adults	27.4	2123	1
5.	Children	1.2	91	1
Cases accompanied by non-family members		**28.6**	**2214**	**n/a**

The results in Table 3.3 show that 89.3 percent of the visitors did not travel with their spouses, 95 percent did not travel with family children and 95.2 percent did not have other family adults.

Using similar analogy, 72.6 percent of the visitors traveled without non-family adults, 98.8 percent traveled without non-family children.

Table 3.3: Unaccompanied tourists by category

Family Members		Percentage	Number of Cases
1.	No Spouse Partners	89.3	6908
2.	No Family Children	95.0	7348
3.	No Other Family Adults	95.2	7366
Sub-Total		**n/a**	**n=7735**
Non-Family Members			
4.	No Adults	72.6	5,613
5.	No Children	98.8	7,643
Sub-Total		**n/a**	**n=7735**
Total		**n/a**	**N=7735**

3.2 Tourists' intention to visit other African countries

The survey intended to find out Uganda's immediate competing destinations for tourists within the African region. Knowing these destinations helps assess the impact of the differences between products offered by Uganda and those of other countries.

The results in Table 4.2 show that 22.07 percent of the tourists to Uganda also intended to visit Kenya during the same trip. This is a significant statistic and implies that Kenya is likely to be offering some products that are unique and different from those of Uganda.

Tanzania is second to Kenya with 6.0 percent of the tourists visiting the country during the same trip to Uganda. Other destinations significantly visited on the same trip to Uganda include Malawi (1.0 percent), South Africa (0.52 percent), Zambia (0.34 percent) and Namibia (0.31 percent).

The emergency of Malawi in the regional tourism circuit may be attributed to the decline of Zimbabwe as a tourist destination due to unpopular political and socio-economic policies currently under implementation in that country.

Table 3.4: Other African Countries visited after Uganda

Other African Countries		Percentage	Number of Cases
1.	Kenya	22.07	1707
2.	Tanzania	6.0	464
3.	Malawi	1.0	77
4.	South Africa	0.52	40
5.	Zambia	0.34	22
6.	Namibia	0.31	24

*n = 7735

3.3 Other African countries considered for a holiday before choosing Uganda

Tourist visitors were asked to indicate countries that they considered visiting for a holiday before choosing Uganda. The question was intended to obtain considered opinion and perception of the Uganda destination in comparison to others in the African region by intending tourists.

It is worthwhile noting that the results of the order of opinion and perception about the destinations in Table 3.5 is similar to that of the actual significance of visits in Table 3.4.

Kenya is still the leading considered competitor in Uganda's tourist niche' market as indicated in Table 3.5.

Table 3.5: Other African countries considered for a holiday before choosing Uganda

Other African Countries		Percentage	Number of Cases
1.	Kenya	4.89	378
2.	Tanzania	1.69	131
3.	Malawi	0.17	13
4.	Zambia or South Africa	0.09	7
5.	Zimbabwe	0.05	4
6.	DRC	0.03	2

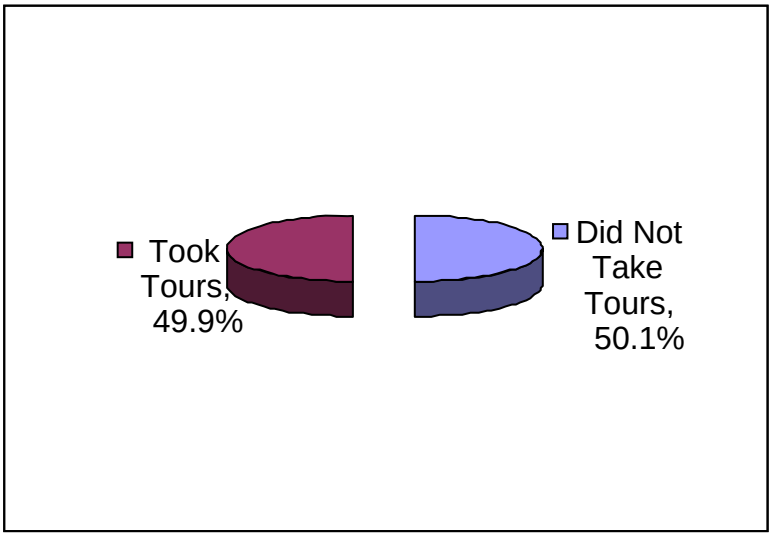
*n = 7735

3.4 Distribution of visitors between those who did and did not do sight-seeing tours, excursions and boat cruises in Uganda

Tourists who take organized tours are normally those on holiday, vacation and leisure visits. The results in Chart 2 show that 49.9 percent of the visitors to Uganda undertook some organized sightseeing tours, excursions and boat cruises. The results imply that a significant number of visitors to the country that are not on holiday/vacation/leisure also undertake sightseeing tours, excursions and boat cruises.

Chart 6 also shows that 50.1 percent of the tourists do not undertake any sightseeing tours, excursions and boat cruises. It should be noted that these are the immediate potential market for tourism products in the country who should be attracted to them.

Chart 6: Distribution of visitors between those who took and those who did not take organized sight-seeing tours, excursions and boat cruises in Uganda



3.5 Tourist visitors by popular tours taken

The survey required tourist visitors to indicate the popular tours they took during their visit to the country. The results provided are intended to confirm popularity of key tourism centers in the country.

The results in Table 3.6 indicate that a majority of tourists (28.0 percent) visit the source of the Nile, followed by Bujagali (22.0 percent), Kampala Tours (15.3 percent) and water rafting on the Nile (10.3 percent).

The other key tours include Murchison Falls National Park (7.0 percent), Southern Queen Elizabeth National Park (Ishasha Sector) (6.8 percent), Northern Queen Elizabeth National Park (6.3 percent) and Lake Bunyonyi (6.0 percent).

Others are: Bwindi Impenetrable Forest National Park (5.9 percent), Ssese and other Lake Victoria Islands and the Uganda Wildlife Education Center.

The important feature about the results in Table 3.6 is the overwhelming significance of the Nile in the country's tours. The results show that a total of 60.3 percent of the tourists to the country undertook tours that were related to the Nile. These tours are: Source of the Nile, Bujagali Falls and water rafting on the Nile.

It should also be noted that both water rafting and Bujagali Falls were visited by 32.2 percent of the tourists to the country. Similar analogy indicates that 91.0 percent of the visitors included within their tours visits to attractions located in Jinja, Kampala and Entebbe.

The results further indicate that the tour of Murchison Falls National Park is the most popular among the National Parks, followed by Queen Elizabeth National Park.

The apparent less significance of Bwindi Impenetrable Forest National Park in the results of Table 3.6 is attributed to the limited permits for gorilla viewing in the Park.

Table 3.6: Tourist visitors by popular tours taken

Tour/Excursion/Boat Cruise Taken		Percentage	Number of Cases
1	Source of the Nile	28.0	2164
2	Bujagali Falls	22.0	1702
3	Kampala Tours	15.3	1187
4	Water Rafting on the Nile	10.3	794
5	Murchison Falls National Park	7.0	545
6	Southern Queen Elizabeth National Park	6.8	524
7	Nothern Queen Elizabeth National Park	6.3	487
8	Lake Bunyonyi	6.0	467
9	Bwindi Impenetrable Forest National Park	5.9	459
10	Ssese and Other Lake Victoria Islands	5.6	436
11	Uganda Wildlife Education Center	5.4	416
12	Kazinga Channel	3.5	273
13	Lake Mburo	3.4	260
14	Mgahinga Forest National Park	2.3	175
15	Mount Elgon Climbing	2.2	172
16	Grand Tour (Western Uganda, Queen Elizabeth NP & Murchison Falls NP)	1.9	148
17	Rwenzori Mountain Climbing	1.3	104
18	Kidepo Valley National Park	0.9	69
19.	Nyero Rock Paintings	0.5	35
20	Others	8.2	642

3.6 Reasons given for not taking any organized tours, excursions and boat cruises

Visitors who did not take organized tours, excursions and boat cruises were asked to give reasons for not doing so. The results in Table 3.7 show that a majority of the visitors (27.6 percent) did not take organized tours due to the limited time they had to spend in the country.

It is important to note that 1.3 percent of the visitors perceive as expensive the tours within Uganda.

In addition, visitors who did not take tours because they lacked information were 0.6 percent.

Table 3.7: Reasons given for not taking any organized tours, excursions and boat cruises

Reasons for Not Taking Organized Tours		Percentage	Number of Cases
1.	Limited Time	27.6	2132
2.	Had other activities	8.7	670
3.	Conducting other business	5.1	392
4.	Limited Finance/Expensive Destination	1.3	100
5.	Had been there before	1.0	77
6.	Lacked Information	0.6	45
7.	Other Reasons	3.1	240

*n=7735

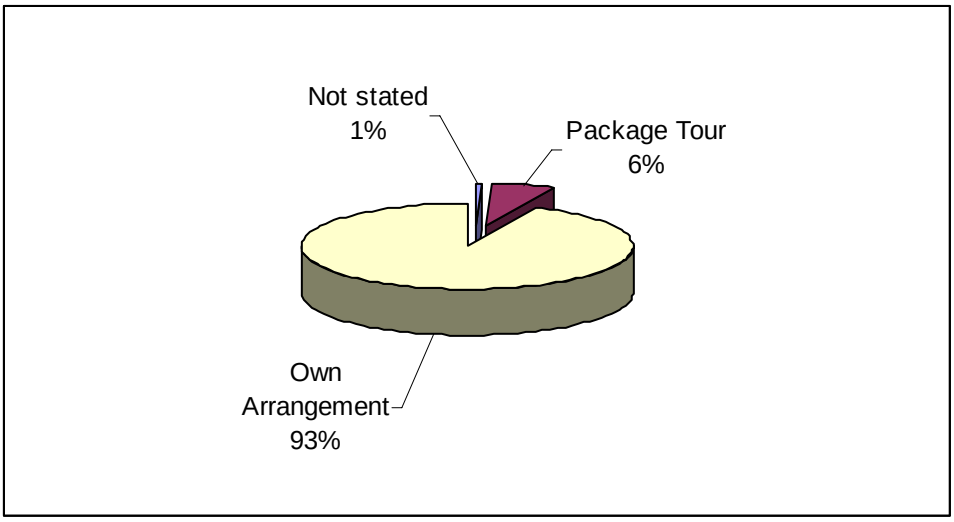
3.7 Tourist visitors by travel arrangement

Tourists are either fully independent or package travelers. The survey results, illustrated in Chart 7, show that a majority of the tourists (93 percent) coming to Uganda travel under their own arrangements (fully independent travelers), while 6 percent travel under package travel arrangements organized through tour operators and travel agents.

The results show that there is limited organized travel of visitors to Uganda which indicates the limited role of tour operators and travel agents in the country's tourism. Limited package visitors imply high overhead costs for the country's tour operators and travel agents leading to high costs for the few tourists handled.

The country should aim at attracting more international tour companies with capacity to make tour packages cheaper as they will handle bigger tourist numbers.

Chart 7: Tourist visitors by travel arrangement



Following up on the travel arrangement, tourists on package tour were asked to name the companies that they used to arrange their trip.

The results in Table 3.8 indicate that more than 39 tour companies handled the limited number of package visitors. This may be attributed to the absence of key multi-national tour companies with prominent presence in the niche' markets.

The results also show that the four companies that lead in handling tourists to Uganda have no direct presence in the country. These are: Absolute Africa (UK), Worldwide Travel (UK), Exodus (UK) and Pheonix Expeditions (UK).

The companies with direct presence in Uganda and handle a significant number of package tourists are: Afriland Safaris, Oasis Tours, Churchill, Gorriland, Pearl of Africa Tours and Travel and Lake Kitandara Tours and Travel.

Others are: Volcanoes Safaris, Classic Safaris, Livingstone Travels, African Pearl Safaris, Express Safaris Company, Let's Go Travel and Uganda Safari Company.

Table 3.8: Package tourists by Tour Company used

Tour Company Used		Percentage	Number of Cases
1	ABSOLUTE AFRICA (UK)	6.67	28
2	WORLDWIDE TRAVEL (UK)	5.95	25
3	EXODUS (UK)	3.10	13
4	PHEONIX-EXPEDITIONS (UK)	3.10	13
5	OVERLAND CLUB	2.86	12
6	KANANGA TOUR COMPANY	2.62	11
7	AFRILAND SAFARIS	2.62	11
8	OASIS TOURS	2.62	11
9	KUMUKA EXPEDITIONS	2.38	10
10	AFRICA OVERLAND CLUB	2.14	9
11	DRAGOMAN (UK)	2.14	9
12	CHURCHILL	1.90	8
13	GORRILAND	1.90	8
14	PEARL OF AFRICA TOURS & TRAVEL	1.90	8
15	AFRICAN TRAILS	1.67	7
16	EXPLORE WORLDWIDE	1.43	6
17	LAKE KITANDARA TOURS & TRAVEL	1.19	5
18	ACACIA ADVENTURE HOLIDAY	1.19	5
19	ECONOMIC EXPEDITIONS(UK)	1.19	5
20	ENCOUNTER UK	1.19	5
21	SAWADEE – HOLLAND	1.19	5
22	VOLCANOES SAFARIS	1.19	5
23	CLASSIC SAFARIS	0.95	4
24	LIVINGSTONE TRAVELS	0.95	4
25	AFRICA ADVENTURE	0.71	3
26	AFRICA VENTURE LIMITED	0.71	3
27	BUKIMA ADVENTURE TOURS	0.71	3
28	BUNSON TRAVEL AGENTS	0.71	3
29	GLOBAL TRAVEL AGENT	0.71	3
30	HABARI TRAVELS	0.71	3
31	LIBERTY TRAVEL	0.48	2
32	KISUMU TOUR & TRAVEL	0.48	2
33	MAGIC SAFARIS	0.48	2
34	DISCOVERY INITIATIVES	0.48	2
35	AFRICAN PEARL SAFARIS	0.48	2
36	EXPRESS TRAVEL CO	0.48	2
37	LETS GO TRAVEL	0.48	2
38	SWIFT FLIGHT	0.48	2
39	UGANDA SAFARI COMPANY	0.48	2
	OTHERS	29.76	125
	NOT STATED	7.62	32
TOTAL		**100**	**420**

3.8 Tourist visitors by type of accommodation

During the survey, respondents were asked to indicate the types of accommodation they stayed in during their trip to Uganda. The result was

intended to show the relative popularity of various types of accommodation to visitors.

Table 3.9 shows that a majority of visitors to the country (52.2 percent) stay in hotels followed by 36.3 percent who stay in private homes. Tourists who stay in hostels and campsites are 13.1 percent; those staying in motels, inns and guest houses are 11.3 percent; those staying in safari lodges and luxury tented camps are 6.9 percent; and those staying in cottages and bandas are 2.9 percent.

The results are consistent with earlier findings which indicated that a majority of visitors (91.0 percent) take tours in Jinja, Kampala and Entebbe where they stay in hotels. The results also show that a small number of the visitors stay in safari lodges, luxury tented camps and cottages and bandas which are mainly located in the protected areas.

However, it should be noted that the naming of accommodation establishments in Uganda is in many cases not consistent with international standards. For instance, establishments named as hotels may merely qualify to be Inns.

Table 3.9: Tourist visitors by type of accommodation

Type of Accommodation		Percentage	Number of Cases
1.	Hotel	52.2	4040
2.	Private	36.3	2808
3.	Hostel/Campsite	13.1	1017
4.	Motel/Inn/Guest House	11.3	873
5.	Safari Lodge & Luxury Tented Camp	6.9	534
6.	Cottage & Banda	2.9	221

*n=7735

Further analysis of accommodation by visitor nights spent was done to facilitate understanding of length of stay for each type of accommodation category.

The results in Table 3.10 show that a majority of visitors (27.8 percent) who stayed at Hotels on average spent 4-7 nights.

The results also show that a majority of those who stayed at Motels, Inns and Guest Houses (24.4 percent) and the majority of those that stayed at Safari lodges and Luxury Tented Camps (35.0 percent) spent 8-14 nights.

A majority of visitors who stayed in Bandas and Cottages (34.4 percent) on average spent 15-28 nights.

The majority of the visitors who stayed at Hostels and Campsites (31.0 percent) and the majority of those at the Private facilities (20.6 percent) spent 8-14 nights.

Table 3.10: Visitor-nights spent by type of accommodation

Type of Accommodation		Visitor-days Spent							Total
		1	1-3	4-7	8-14	15-28	1-6 months	6-12 months	
Hotel	Percentage	12.1	23.5	27.8	19.3	10.4	6.7	0.2	**100**
	Number of Cases	489	949	1123	780	419	269	10	**4039**
Motel/Inn/ Guest House	Percentage	7.8	14.6	22.6	24.4	17.2	13.0	0.5	**100**
	Number of Cases	68	127	197	213	150	113	4	**872**
Safari Lodge & Luxury Tented Camp	Percentage	2.1	5.2	16.3	35.0	27.3	13.3	0.7	**100**
	Number of Cases	11	28	87	187	146	71	4	**534**
Cottage & Banda	Percentage	0.5	3.6	11.8	32.6	34.4	16.7	0.5	**100**
	Number of Cases	1	8	26	72	76	37	1	**221**
Hostel/Campsite	Percentage	2.1	8.7	22.2	31.0	20.2	15.4	0.5	**100**
	Number of Cases	21	88	225	315	205	156	5	**1015**
Private	Percentage	6.1	14.6	20.1	20.6	19.3	18.1	1.2	**100**
	Number of Cases	170	410	564	578	541	507	35	**2805**

*n = 7735

3.9 Tourist visitors who stayed in hotels by location in Uganda

An attempt was made during the survey to know the location of the hotels where the tourists stayed during their trip to Uganda.

The results in Table 3.11 show that a majority of the tourists (77.46 percent) stayed in hotels located in Kampala. The results also show that 6.69 percent spent the residents in Entebbe, while 4.71 stayed in the hotels in Jinja.

The results show the relative importance of hotels in various locations in the country to the tourism sector. A higher percentage indicates a greater number of tourists utilizing the facility.

Table 3.11: Tourist visitors who stayed in hotels by location in Uganda

Location of Hotel		Percentage	Number of Cases
1	KAMPALA	77.46	3127
2	ENTEBBE	6.69	270
3	JINJA	4.71	190
4	SIPPI\KAPCHORWA\MBALE	1.61	65
5	MUKONO	1.04	42
6	QENP\KASESE\MWEYA	0.82	33
7	MFNP/MASINDI/HOIMA	0.79	32
8	MBARARA	0.79	32
9	FORTPORTAL	0.74	30
10	TORORO\MALABA\BUSIA	0.72	29
11	KISORO	0.47	19
12	KABALE	0.45	18
13	MASAKA	0.42	17
14	SOROTI	0.30	12
15	GULU	0.25	10
16	ARUA	0.22	9
17	BWINDI NP	0.17	7
18	IGANGA	0.17	7
19	SSESE\BULAGO ISLANDS	0.15	6
20	WAKISO	0.12	5
21	KIBAALE	0.12	5
22	ADJUMANI	0.10	4
23	MUBENDE\MITYANA	0.10	4
24	BUGIRI	0.05	2
25	LUWERO	0.05	2
26	RAKAI	0.05	2
27	MOROTO	0.05	2
28	KUMI	0.02	1
29	LIRA	0.02	1
30	PALISA	0.02	1
31	SEMLIKI	0.02	1
32	LOCATION OF HOTEL NOT STATED	1.29	52

*n = 7735

3.10 Tourist visitors who stayed at Motels\Inns\Guest Houses by location in Uganda

Motels, Inns and Guest Houses are in the same category of accommodation establishments in the country's tourism information data base of the Ministry of Tourism, Trade and Industry. By function, however, as opposed to Motels which are intended for night stopovers, Inns and Guest Houses are designed to keep guests for longer periods of stay.

The results in Table 3.12 show that 53.4 percent of the visitors to the country stayed in Motels, Guest Houses and Inns in Kampala. The results also show that 8.77 percent and 7.04 percent of the visitors stayed in this category of accommodation in Entebbe and Jinja, respectively. The other percentages corresponding to the locations in the country are also given in the table.

Table 3.12: Tourist visitors who stayed at Motels/Inns/Guest Houses by location in Uganda

Location of Motels/Inns/Guest Houses		Percentage	Number of Cases
1	KAMPALA	53.40	463
2	ENTEBBE	8.77	76
3	JINJA	7.04	61
4	KABALE/MUNYONYO	3.34	29
5	MBALE/SIPPI/KAPCHORWA	2.65	23
6	FORTPORTAL	2.19	19
7	KASESE	2.19	19
8	QENP/MWEYA	2.08	18
9	MBARARA\L.MBURO N.P	1.85	16
10	MASINDI/MFNP	1.38	12
11	KISORO	1.27	11
12	KIBAALE	1.15	10
13	HOIMA	0.92	8
14	MASAKA	0.92	8
15	GULU	0.81	7
16	ARUA	0.81	7
17	BWINDI	0.69	6
18	MUKONO	0.69	6
19	TORORO	0.69	6
20	LUWERO	0.46	4
21	MOROTO	0.46	4
22	BUSHENYI	0.35	3

Table 3.12: Tourist visitors who stayed at Motels\Inns\Guest Houses by location in Uganda Cont'd

Location of Motels/Inns/Guest Houses		Percentage	Number of Cases
23	RUKUNGIRI\KISIZI	0.35	3
24	SOROTI	0.35	3
25	BUSIA	0.23	2
26	IGANGA	0.23	2
27	KALANGALA	0.23	2
28	RAKAI	0.23	2
29	WAKISO	0.23	2
30	ADJUMANI	0.12	1
31	KIBOGA	0.12	1
32	KIBIMBA	0.12	1
33	MUBENDE	0.12	1
34	NAKASONGOLA	0.12	1
35	NTUGAMO	0.12	1
36	LIRA	0.12	1
37	LOCATION OF MOTEL NOT STATED	3.23	28

*n = 7735

3.11 Tourist visitors who stayed at Safari Lodges/Luxury Tented Camps by location

Safari Lodges and Luxury Tented Camps are mainly a preserve of protected areas in Uganda. They are therefore, located in National Parks and Wildlife Reserves of the country.

The results in Table 3.13 show that a majority of visitors (41.38 percent) that stayed in Safari Lodges\Luxury Tented Camps were in Kasese and Mweya Safari Lodge, in particular.

Murchison Falls (Paraa/Sarova Safari lodge) had 11.07 percent of the visitors staying there, which low performance is attributed to the insecurity that prevailed in parts of Gulu, including areas bordering northern parts of Murchison Falls National Park.

The relative importance of various safari lodges and tented camps in different locations in the country can be obtained from the results in Table 3.13.

Table 3.13: Tourist visitors who stayed at Safari Lodges/Luxury Tented Camps by location

Location of Safari Lodges/Luxury Tented Camps Strayed in		Percentage	Number of Cases
1	KASESE\MWEYA	41.38	228
2	MURCHISON FALLS NP/MASINDI	11.07	61
3	KAMPALA	9.44	52
4	BWINDI NP	7.62	42
5	JINJA	4.90	27
6	KABALE\BUNYONYI	3.81	21
7	MBARARA\L.MBURO	3.81	21
8	KABALE	1.81	10
9	KIBAALE	1.27	7
10	MBALE\KAPCHORWA	1.27	7
11	KIBAALE	1.27	7
12	KISORO	1.27	7
13	BUSHENYI	0.91	5
14	KOTIDO	0.91	5
15	SSESE ISLAND	0.91	5
16	ENTEBBE	0.73	4
17	NGAMBA ISLAND	0.73	4
18	FORTPORTAL	0.54	3
19	MUKONO	0.54	3
20	SEMLIKI	0.54	3
21	ARUA	0.36	2
22	GULU	0.36	2
23	MASAKA	0.36	2
24	MPIGI	0.18	1
25	SEMBABULE	0.18	1
26	KITGUM	0.18	1
27	WAKISO	0.18	1
28	LOCATION OF SAFARI LODGE NOT STATED	3.45	19

*n = 7735

3.12 Tourist visitors who stayed at Hostels/Campsites by location in Uganda

Hostels and Campsites are commonly used by budget visitors to the country.

The results show that most visitors who stayed in hostels and campsites did so in Kampala (36.99 percent). Jinja, Budhagali in particular, had 23.67 percent of the visitors that stayed in hostels and campsites.

Other places that are popular with hostels and campsites include lake Bunonyi (6.97 percent), Mweya (6.35 percent), Murchison Falls National Park (5.94 percent) and Bwindi National Park (4.41 percent).

The relative importance of other locations in the country that offer hostel and campsite accommodation are also given in Table 3.14 below.

Table 3.14: Tourist visitors who stayed at Hostels/Campsites by location in Uganda

Location of Hostels/Campsites Strayed in		Percentage	Number of Cases
1	KAMPALA	36.99	361
2	JINJA/BUDHAGALI	23.67	231
3	KABALE/L.BUNYONYI	6.97	68
4	MWEYA/KASESE	6.35	62
5	MASINDI/MURCHISON FALLS NP	5.94	58
6	BWINDI NP	4.41	43
7	ENTEBBE	1.95	19
8	KISORO/MUGHAHINGA	1.33	13
9	SSESE ISLANDS	1.13	11
10	FORTPORTAL	0.92	9
11	KIBAALE NP	0.82	8
12	MASAKA	0.72	7
13	MBALE/TORORO	0.61	6
14	NYERO/SOROTI	0.61	6
15	MUKONO	0.51	5
16	KIDEPO/KARAMOJA	0.31	3
17	ARUA	0.20	2
18	BANDA ISLAND	0.20	2
19	IGANGA	0.20	2
20	KAAZI	0.20	2
21	RUKUNGIRI	0.20	2
22	WAKISO	0.20	2
23	KISOZI	0.10	1
24	HOIMA	0.10	1
25	LIRA	0.10	1
26	MPIGI	0.10	1
27	MUBENDE	0.10	1
28	NABUGABO	0.10	1
29	RAKAI	0.10	1
30	SEMLIKI	0.10	1
31	LUWERO	0.10	1
32	LOCATION OF HOSTEL/ CAMPSITE NOT STATED	4.66	45

*n = 7735

3.13 Tourist visitors who stayed at Cottages and Bandas

Cottage and Banda accommodation are common both in urban and wildlife protected areas of Uganda.

Table 3.15 shows that a majority of the tourists who stayed in cottages and bandas did so in Kampala (11.93 percent), followed by Bwindi National Park (10.09 percent).

Other areas popular with cottages and bandas included Bujagali (9.63 percent), Murchison Falls National Park (9.63 percent), Lake Mburo National Park (8.72 percent), Lake Bunyonyi (8.26 percent) and Queen Elizabeth National Park (7.80 percent).

Others are: Sesse Islands (6.88 percent), Kibaale (6.42 percent), Mount Elgon National Park (4.13 percent) and Mugahinga National Park (2.75 percent).

Table 3.15: Tourist visitors who stayed at Cottages and Bandas by location in Uganda

Location of Cottages and Bandas stayed in		Percentage	Number of Cases
1	KAMPALA	12.85	26
2	BWINDI/BUHOMA	10.09	22
3	BUJAGALI/JINJA	9.63	21
4	MASINDI/MURCHISON FALLS NP	9.63	21
5	L.MBURO	8.72	19
6	KABALE/L.BUNYONYI	8.26	18
7	QENP/KASESE	7.80	17
8	KALANGALA/SSESE	6.88	15
9	KIBAALE	6.42	14
10	SIPPI/MT. ELGON NP	4.13	9
11	KISORO/MUGHAHINGA NP	2.75	6
12	ENTEBBE	1.38	3
13	FORTPORTAL	1.38	3
14	APOKA/KIDEPO	0.92	2
15	BUGALA ISLAND	0.92	2
16	NGAMBA ISLAND	0.46	1
17	MUKONO	0.46	1
18	SEMLIKI	0.46	1
19	KARINZU FOREST	0.46	1
20	LOCATION OF COTTAGE/BANDA NOT STATED	6.42	14

3.14 Tourist visitors who stayed in private homes

The survey also required to know the extent to which tourist visitors to the country stay in private homes. Private homes refer to accommodation places that are not gazetted commercial establishments. These places include private homes where the visitors stay with relatives and friends and those that owners temporarily vacate and instead dedicate to their visitors.

The results in Table 3.16 show that a large majority of tourists who stay in private homes do so in Kampala (70.14 percent).

Other areas popular with accommodation of tourists in private homes include Jinja (5.16 percent), Entebbe (3.74 percent) and Mbale (2.92 percent).

Table 3.16: Tourist visitors who stayed in private homes by location in Uganda

Location of Private Accommodation stayed in		Percentage	Number of Cases
1	KAMPALA	70.14	1971
2	JINJA	5.16	145
3	ENTEBBE	3.74	105
4	MBALE	2.92	82
5	MUKONO/LUGAZI	1.60	45
6	L.MBURO/MBARARA	1.25	35
7	MASAKA	1.25	35
8	BUSIA/MALABA/TORORO	1.10	31
9	WAKISO	0.82	23
10	ARUA/KOBOKO	0.78	22
11	KABALE/L.BUNYONYI	0.78	22
12	MFNP/MASINDI	0.60	17
13	LUWERO	0.60	17
14	GULU	0.57	16
15	QENP/KASESE	0.50	14
16	FORTPORTAL	0.46	13
17	KAMULI	0.39	11
18	IGANGA	0.36	10
19	MUBENDE/MITYANA	0.36	10
20	SOROTI/KATAKWI	0.32	9
21	HOIMA	0.25	7
22	MPIGI	0.25	7
23	KARAMOJA	0.21	6
24	KIBAALE	0.21	6
25	SSESE ISLANDS	0.18	5
26	BUGIRI	0.14	4
27	BUJJAGALI	0.14	4
28	LIRA	0.14	4
29	KITGUM	0.14	4
30	NEBBI	0.14	4
31	ADJUMANI	0.11	3
32	KAPCHORWA	0.11	3
33	MAYUGE	0.07	2
34	BUSHENYI	0.07	2
35	IBANDA	0.07	2
36	KISIZI	0.07	2
37	KIBOGA	0.07	2
38	RAKAI	0.07	2
39	SEMILIKI	0.07	2
40	BUDONGO FOREST	0.04	1
41	BOMBO - LUWERO	0.04	1
42	BUNDIBUGYO	0.04	1

Table 3.16: Tourist visitors who stayed in private homes by location in Uganda Cont'd

Location of Private Accommodation stayed in		Percentage	Number of Cases
43	KALIRO	0.04	1
44	KANUNGU	0.04	1
45	KISORO	0.04	1
46	MOYO	0.04	1
47	NTUGAMO	0.04	1
48	PACKACH	0.04	1
49	PADER	0.04	1
50	PALLISA	0.04	1
51	APAC	0.04	1
52	LOCATION OF PRIVATE HOME NOT STATED	3.35	94
TOTAL		100	2810

*n = 7735

CHAPTER FOUR

TOURIST EXPENDITURE PATTERNS

Introduction

This chapter is devoted to presentation of results of the survey regarding tourist expenditure patterns. Tourist expenditure estimates are crucial to macro and micro-level planning and policy and operational decision making. The expenditure estimates are particularly important indicators of the general trend of the tourism sector, which are often the basis for government interventions.

Tourist expenditures provide direct incomes and employment to service providers who in turn use the incomes to purchase goods/services and create employment in so doing and so on. This chain of expenditure generates multiplier effects of income, employment and output, which are the ultimate measurable impact of tourism.

A number of other economic indicators can be derived from the relationship between tourism and other economic variables in order to describe tourism related performance on the economy. These indicators include the percentage contribution of tourism to the Gross Domestic Product (GDP) and exports in the economy.

The survey results on tourist expenditure questions are presented in three sections in the chapter, namely; package, fully independent (own arrangement) and overall tourist expenditures. Analysis results are also presented for expenditures within the country and outside.

Tourists were asked to declare their expenditure in any currency, which were translated into United States dollars using average international exchange rates for 2003, for ease of comparison.

Attempt has been made to derive the country's total earnings from direct tourism expenditure during the year 2003. Forecasts have been made of the country's expected tourism earnings for the next five years (2004-2008). The forecasts are based on the country's expected growth in tourist traffic.

4.1 Total average tourist expenditure

Tourist visitors were asked to state their total expenditure in Uganda, including family members/friends traveling with them. The expenditure excluded all pre-payments made from abroad before embarking on their trip.

The results in Table 4.1 show that visitors passing through Entebbe were the highest spenders, with an average expenditure of US dollars 1068. Visitors passing through Malaba were the second highest spenders with an average expenditure of US dollars 340. Visitors passing through Busia were the spend least in the country at an average rate of US dollars 243.

The low expenditure of tourists passing through Busia and Malaba is attributed to budget visitors.

The results give an average combined tourist expenditure in Uganda of US dollars 719 for the three key border posts of Entebbe, Malaba and Busia.

The results also indicate the total number of persons included in the expenditure by border entry/exit point.

Table 4.1: Total average tourist expenditure by Border entry/exit point

Border Post		Overall Average Expenditure (in USD)	Number of Persons Included in Expenditure	Number of Respondents	Not Stated
1.	BUSIA	243	2057	1479	79
2.	ENTEBBE	1068	5767	4070	257
3.	MALABA	340	2739	1787	63
TOTAL		**719**	**10563**	**7336**	**399**

4.2 Percentage distribution of ALL visitors by services paid for in Uganda, excluding international airfare

It was envisaged necessary to establish what items the tourists actually paid for in the country. The results are intended to provide information on relative importance of services in the country.

Table 4.2 indicates that a majority (68.6 percent) of tourists spent on meals in the country, followed by accommodation (60.6 percent). 33.4 percent of the visitors spent on breakfast, 21.5 percent on car rental, 20.6 percent on sightseeing and 12.6 percent on National Park visits.

Other significant expenditures included 3.3 percent who spent on airport transfers and 1.2 percent who spent on domestic airfare. 76.6 percent of the visitors declared to have spent on items other than those that were specifically categorized in the questionnaire.

Table 4.2: Percentage distribution of ALL visitors by services paid for in Uganda, excluding international airfare

Service Paid For		Percentage	Number of Respondents
1.	Meals	68.6	5307
2.	Accommodation	60.6	4686
3.	Breakfast	33.4	2582
4.	Car-Rental	21.5	1661
5.	Sight-Seeing	20.6	1590
6.	National Park Visit	12.6	974
7.	Airport Transfers	3.3	252
8.	Domestic Airfare	1.2	96
9.	Other Services	76.6	5926

*n = 7735

4.3 Break-down of ALL visitors expenditure in Uganda by category of service and Port of entry, excluding prepaid expenditure and packages.

Sections 4.1 and 4.2 above looked at aggregated expenditures by Port of entry/exit and average expenditures by item, respectively.

The results in Table 4.3 below show average expenditure of tourists by items spent on by Port of entry/exit, excluding all pre-paid expenditures.

From the statistics, it is shown that the total average expenditure on accommodation is US dollars 387; on restaurants and bars is US dollars 217; Domestic air transport is US dollars 290; Organized sightseeing is US dollars 270; and National Parks is US dollars 697.

Other total average expenditures include handicrafts and souvenirs at US dollars 189, other transport at US dollars 197, other shopping at US dollars 175 and miscellaneous (tips and donations) at US dollars 322.

Table 4.3: Break-down of ALL visitors expenditure in Uganda by category of service and Port of entry, excluding prepaid expenditure and packages

Category of Service		Busia		Entebbe		Malaba		Total	
		Average Amount in USD	Respo-ndents	Average Amount in USD	Respo-ndents	Average Amount in USD	Respo-ndents	Average Amount in USD	Respo-ndents
1.	Accommodation & Room Service	126	814	563	2465	192	1136	387	4415
2.	Restaurants & Bars (outside place of stay)	339	906	248	2077	91	1381	217	4364
3.	Domestic Air Transport	88	21	348	102	220	25	290	148
4.	Organised Sight Seeing Tours	197	170	384	653	150	513	270	1336
5.	National Park Visits	155	74	217	401	169	222	195	697
6.	Other Transport	238	806	255	1553	93	1193	197	3552
7.	Handicrafts & Souvenirs	924	92	149	955	66	242	189	1289
8.	Other Shopping	104	663	268	1209	99	858	175	2730
9.	Miscellaneous (Tips & Donations)	90	394	457	1461	116	521	322	2376

*n = 7735

4.4 Tourist visitors' expenditure by purpose of visit

It is often useful to understand the pattern of expenditure of tourists by purpose of visit. Obtaining average expenditures for each category of tourists gives indication of the revenue benefit from the corresponding category of visitors. The survey results in Table 4.4 give the average tourist expenditure by category of visitors to Uganda.

The results show that visitors on holiday, leisure and vacation spent US dollars 796, on average. This result is close to and consistent with that of the average expenditure for independent tourists of US dollars 842, in section 4.10. Further interpretation of the average expenditure of tourists on holiday, leisure and vacation gives a daily expenditure of about US dollars 60-100 per tourist, considering that a majority of holiday visitors spend an average of 8-14 days in

the country. This average expenditure for holiday visitors is low by international standards and is attributed to the large number of budget tourists to the country.

On the other hand, the highest average tourist expenditure was US dollars 1437, by the category of visitors on business, conference and official work. The average daily expenditure of this category was about US dollars 200-360 per day, considering that a majority of them spent an average of 4-7 days in the country. This scenario may explain the bias of hotel and travel agents' operations to business and conference activities.

The results also indicate that the category of those visiting friends and relatives had an average daily expenditure of about US dollars 100-175, considering that they spent an average of 4-7 days.

A majority of visitors on stop-over stayed for one day and spent US dollars 136, on average.

The average expenditure by pilgrims of US dollars 687 translates into a daily average expenditure of US dollars 100-170.

A majority of the "others" category spent an average of 1-3 days and US dollars 723 during the stay. This implies that they had an average daily expenditure of about US dollars 240-725. This category of high expenditure is attributed to visitors on international development/peace and charity activities.

Table 4.4: Tourist visitors' expenditure by purpose of visit

Purpose of Visit	Average Expenditure in USD	Number of Respondents
Holiday/Leisure/Vacation	796	1991
Business/Conference/Official	1437	2917
Visiting Friends/Relatives	697	1909
Transit/Stop-Over	136	267
Pilgrimage/Religion	687	284
Other	723	333

4.5 Advance expenditure of ALL visitors by Border entry/exit point

Tourist visitors were asked to state their advance expenditure on the trip before coming to Uganda. Advance expenditures indicate possible macro-economic leakages linked to the tourism sector.

The results in Table 4.5 indicate that average advance expenditures exceed expenditures made within the country for all three key Ports of entry/exit in Table 4.1. In particular, advance payments for visitors passing through Busia exceeded expenditures in the country by 326 percent, while advance expenditures in Entebbe and Malaba exceeded by 20 percent and 50 percent, respectively.

The high advance expenditure for visitors through Busia and Malaba may be explained by the high cost of hiring trucks met by over-landers.

On the whole, the total average advance expenditure is US dollars 879, which exceeds the average expenditure within the country by 22.3 percent.

It is interesting to note that while tourists passing through Entebbe make the highest advance payments, they also spend highest in the country.

Table 4.5: Advance expenditure of ALL visitors by Border entry/exit point

Border Post		Advance Average Expenditure (in USD)	Number of Persons Included in Expenditure	Number of Respondents	Not Stated
1.	Busia	1036	127	1473	85
2.	Entebbe	1284	866	3844	483
3.	Malaba	510	1004	1030	820
Total		**879**	**1997**	**6347**	**1388**

4.6 Package visitor expenditure in Uganda by Border entry/exit point

Previous analysis in section 3.7 indicated that 6 percent of the visitors were package tourists. They, therefore, traveled under arrangements of tour operators, travel agents, hoteliers and transport operators. The main purpose of visiting for package visitors is normally holiday, vacation and leisure. Most of their travel expenses are also normally made before commencement of the trip.

The survey results in Table 4.6 below indicate that package visitors spent an average of US dollars 1349 in 2003.

The results also indicate that package visitors passing through Entebbe were the highest spenders, with an average expenditure in the country of US dollars 1614. Package tourists through Malaba were the second biggest spenders, with an average of US dollars 1517. Package visitors passing through Busia were the least spenders, with an average expenditure of US dollars 613.

Table 4.6: Package visitor expenditure in Uganda by Border entry/exit point

Border Post		Average Expenditure (in USD)	Number of Persons Included in Expenditure	Number of Respondents	Not Stated
1.	Busia	613	208	1492	66
2.	Entebbe	1614	415	4157	170
3.	Malaba	1517	257	1700	150
Total		**1349**	**880**	**7349**	**386**

4.7 Percentage distribution of package visitors by expenditure on items, excluding international airfare

Further analysis was conducted to understand expenditure patterns on items by package visitors.

The results in Table 4.7 indicate that 80.5 percent of package visitors spend on accommodation; 64.9 percent spend on meals; 48.4 percent on National Park visits; 47.3 percent spend on sightseeing; 22.8 percent on airport transfers; 23.4 percent on car rentals; 17.4 percent on breakfast and one main meal; and 5.4 percent on domestic airfares. Expenditure on other services were made by 17.6 percent.

The high prominence of expenditure on National Park visits and sightseeing is consistent with the package tourists' main purpose of visit, holiday/vacation/leisure.

Table 4.7: Percentage distribution of package visitors by expenditure on items, excluding international airfare

Item		Percentage	Number of Cases
1.	Accommodation	80.5	371
2.	All Meals	64.9	299
3.	National Park Visits	48.4	223
4.	Sightseeing	47.3	218
5.	Airport Transfers	22.8	105
6.	Car Rental	23.4	108
6.	Breakfast & One Main Meal	17.4	80
7.	Domestic Airfares	5.4	25
8.	Other Services	17.6	81

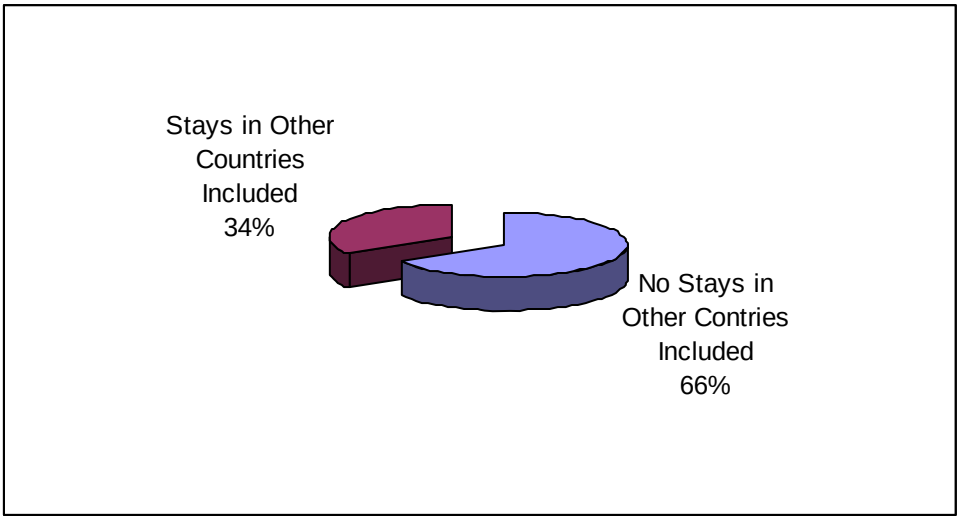
*n = 461

4.8 Percentage distribution of Package visitors by inclusion of stays in other Countries

In relation to items included in the package tour, visitors were asked whether their package included stay in other countries on this trip.

The survey results in Chart 8 indicate that the package for a majority of tourists (66 percent) did not include stay in other countries, while 34 percent included stay in other countries. This implies that most of the package cost was spent in Uganda.

Chart 8: Percentage distribution of Package visitors by inclusion of stays in other Countries



*n = 461

4.9 Expenditure of visitors on own arrangement by category of items/services purchased

The analysis in section 3.7 indicates that 93 percent of the visitors to Uganda travel under own (fully independent arrangement). This implies that 93 percent of the visitors had minimum or no contact at all with tourism institutions. The analysis of advance average expenditure by item revealed the results in Table 4.8.

The results show that domestic airfare was the highest advance average cost (US dollars 854) paid by visitors on own arrangement. The second highest advance expenditure was accommodation, with an average payment of US dollars 378.

Other advance average expenditures by independent tourists are: meals at US dollars 171; car rental at US dollars 113; National Park visits at US dollars 144; sightseeing at US dollars 87; and other services at US dollars 220.

Table 4.8: Average advance expenditure of visitors on own arrangement by category of items/services purchased

	Item	Average Expenditure in USD	Persons Involved	Number of Respondents
1.	Accommodation	378	284	150
2.	Any Meals	171	249	137
3.	Domestic Airfare	854	56	43
4.	Car Rental	113	144	73
5.	National Park Visits	144	120	60
6.	Sight-Seeing Tours	87	101	49
7.	Other Services	220	218	147

*n = 7224

4.9 Expenditure for travelers on own arrangement by Port of entry/exit

Like for overall and package visitors, the analysis was conducted to establish the average expenditure of independent travelers by Port of entry/exit.

The results in Table 4.9 show that independent tourists passing through Entebbe are the highest spenders, with an average expenditure of US dollars 1145. The second biggest spenders are those independent tourists passing through Malaba, with an average expenditure of US dollars 642. Independent travelers passing through Busia are the least spenders, with average expenditure of US dollars 256.

In general, independent tourists to Uganda spend an average of US dollars 842.

It should be noted that the average expenditure of independent tourists is less than that for package tourists. This may be attributed to limited number of package tourists, a factor leading to high over-head costs for the tourism institutions. Overall, a higher optimum number of tourists will lead to reduced costs for both independent and package tours in Uganda.

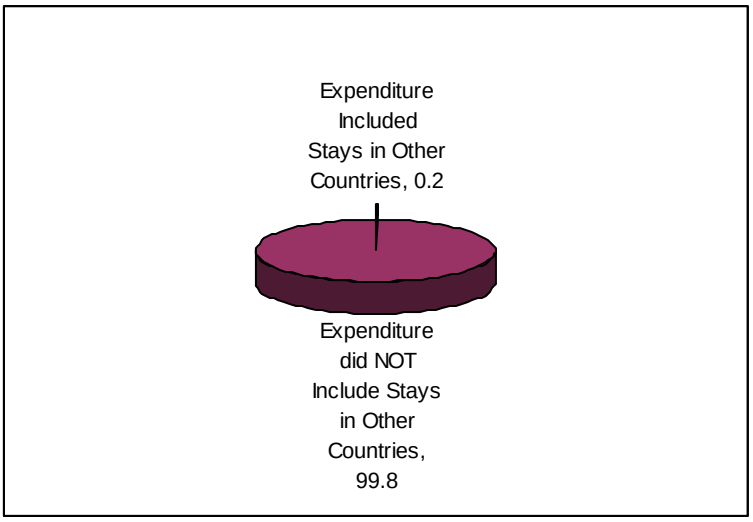
Table 4.9: Average expenditure for Independent Travelers by Port of entry/exit

	Port of Entry/Exit	Average Expenditure in USD	Persons Involved	Number of Respondents	Non-Response
1.	BUSIA	256	2114	1426	127
2.	ENTEBBE	1145	5683	3914	410
3.	MALABA	642	2409	1619	229
TOTAL		**842**	**10206**	**6959**	**766**

*n = 7224

In order to ascertain whether most of the tourist expenditure was made in Uganda, fully independent tourists were required to confirm whether their expenditure declared during the survey included stays in other countries. The results illustrated in Chart 9 indicate that 99.8 percent spent their money in Uganda.

Chart 9: Percentage distribution of Independent Travel visitors by inclusion of expenditure for stays in other countries.



4.10 Estimates of tourist expenditure in Uganda for the year 2003

Estimate of the total annual tourist expenditure is one of the key results of expenditure and motivation surveys. The total annual tourist expenditure estimate is equivalent to the total tourist earnings of the country. Tourist expenditures are actual receipts which indicate the impact of tourism at every level of tourism related income (multiplier).

Careful data cleaning was undertaken in order to ensure that only true and accurate records of the tourist declaration on expenditure are included in the analysis. In addition, the data declared by tourists in various currencies were translated into US dollars using international exchange rates to obtain uniformity.

During earlier analysis in section 3.7, percentages of package and fully independent tourists were established to be 6.0 percent and 93.4 percent, respectively. 0.6 percent did not state their travel arrangement during the survey. In order to obtain figures for total tourist expenditure for the year 2003, the average expenditures for independent (US dollars 842) and package (US dollars

1349) tourists were applied on corresponding monthly time series tourist arrivals data.

The monthly tourist arrivals data for the year 2003 show persistent high tourist traffic during the months of July – October. This high tourist traffic season is attributed to the summer holiday period in Europe and America, when many residents of the temperate countries take their tourism activities. The seeming high season of December-January is mainly due to travel of relatives and friends coming and expatriates departing from the country for Christmas.

The figures in Table 4.10 show that the period March – May are clearly the lowest tourism season. The month of May had the lowest tourist arrivals and receipts during the year 2003.

Table 4.10 shows that the total tourism receipts from visitors on package arrangements were US dollars 24.7 million, while those from visitors on own arrangement were US dollars 240.6 million.

The overall total tourism receipts for the country were US dollars 265.349 million.

Table 4.10: Estimates of total tourist expenditure for the year 2003, excluding payments made abroad

Month	Total Number of Tourist Arrivals	Estimated Package Tourists (6.0%)	Estimated Independent Travelers (93.4%)	Estimated Package Tourist Expenditure in USD	Estimated Independent Travelers Expenditure in USD	Estimated Total Tourist Expenditure in USD
January	23,000	1,380	21,482	1,861,620	18,087,844	19,949,464
February	23,569	1,414	22,013	1,907,675	18,534,946	20,442,621
March	22,756	1,365	21,254	1,841,871	17,895,868	19,737,739
April	22,190	1,331	20,725	1,796,059	17,450,450	19,246,509
May	15,599	936	14,569	1,262,583	12,267,098	13,529,681
June	22,923	1,375	21,410	1,855,388	18,027,220	19,882,608
July	28,501	1,710	26,620	2,306,871	22,414,040	24,720,911
August	24,481	1,469	22,865	1,981,492	19,252,330	21,233,822
September	29,591	1,775	27,638	2,395,096	23,271,196	25,666,292
October	32,498	1,950	30,353	2,630,388	25,557,226	28,187,614
November	25,044	1,503	23,391	2,027,061	19,695,222	21,722,283
December	35,568	2,134	33,434	2,878,766	28,151,428	31,030,194
Total	305,720	18,342	285,754	24,744,870	240,604,868	265,349,738

Source: MTTI and UBOS

Note: The difference of 0.06 percent in the figures above is attributed to non-response.

4.11 Relationships between the 2003 tourist expenditure receipts and national accounts

National Accounts refer to statistics compiled to measure the value of economic activities in a country, for a specific period of time, usually a year. Important statistics compiled include those of the Gross Domestic Product (BOP), national export earnings and Balance of Payments (BOP).

During macro-economic analysis, coefficients are obtained to indicate the relative importance of sectors to the country's GDP. The coefficients may be used either in specific macro-econometric models or input-output tables designed. Total tourism receipts are an important input into such analysis.

The results of this tourist expenditure survey were used to assess the relative importance of tourism to Uganda's economy. This was done by computing the percentage contribution of tourism to the country's exports and GDP.

Preliminary statistics obtained from the Uganda Bureau of Statistics gave a total GDP of Uganda Shillings 11,634,441 million (at current prices) and total exports (including re-exports) of US dollars 552,583,000, for the year 2003.

Bank of Uganda's estimate of invisible exports was US dollars 40 million. The invisible exports computed include communication services, transportation and government services. The Government services include expenditure by embassies.

It was necessary to convert the Shilling GDP to US dollars for comparability with export earnings and tourism receipt figures. An average exchange rate of US dollars 1750, obtained from Bank of Uganda reports, was used.

The results in Table 4.11 show that tourism contributes about 4.0 percent to Uganda's GDP.

The results also show that tourism contributed 29.1 percent of the country's export earnings in 2003. This implies that tourism contributed 30.9 percent of the country's foreign exchange earnings, excluding remittances from the informally externalized manpower and donor support to non-Government activities and Government projects and programs.

Table 4.11: Uganda's tourism receipts as a percentage of total export earnings and Gross Domestic Product for the year 2003.

Tourism Receipts in USD (Millions)	Tangible Export Earnings in USD (Millions)	Invisible Export Earnings in USD (Millions)	Total Export Earnings (Millions)	GDP in USD (Millions)	%-age of Tourism Receipts to Total Export Earnings	%-age of Tourism Receipts to GDP
265.350	552.583	94.167	912.55	6,648.252	29.1	4.0

Source: Uganda Bureau of Statistics, Bank of Uganda and MTTI

4.12 Five-year forecasts of tourism receipts

To guide tourism planning, policy and decision making, it was found necessary to make five year projections of Uganda's tourism receipts. The forecasts are based on the 2003 baseline expenditure statistics and the time series annual tourist arrivals data of the Uganda Bureau of Statistics.

The forecasts were derived by applying the Autoregressive Integrated Moving Averages (ARIMA) model technique on the tourist arrivals data and making adjustments for the upper and lower control limits.

The forecasts in Table 4.12 show that Uganda will earn about US dollars 316.6 million in 2004. The revenue is expected to grow and reach about US dollars 477.0 million in 2008.

However, it should be understood that the forecasts in Table 4.12 could be surpassed in case of major policy interventions in the tourism sector.

Table 4.12: Estimates of Uganda's five-year (2004 – 2008) tourist receipts

Year	Total Number of Tourist Arrivals	Estimated Package Tourists (6.0%)	Estimated Independent Travelers (93.4%)	Estimated Package Tourist Expenditure in USD	Estimated Independent Travelers Expenditure in USD	Estimated Total Tourist Expenditure in USD
2004	365,000	21,900	340,910	29,543,100	287,046,220	316,589,320
2005	405,000	24,300	378,270	32,780,700	318,503,340	351,284,040
2006	445,000	26,700	415,630	36,018,300	349,960,460	385,978,760
2007	495,000	29,700	462,330	40,065,300	389,281,860	429,347,160
2008	550,000	33,000	513,700	44,517,000	432,535,400	477,052,400

Source: MTTI

CHAPTER FIVE

VISITOR RATING OF THE UGANDAN DESTINATION

Introduction

This chapter is devoted to analysis of answers to motivational questions of the survey. The motivational questions were aimed at providing information on visitor satisfaction with services and facilities.

Visitor satisfaction is critical for sustainable tourism because it influences return visits and new arrivals. Tourist visitors are more likely to return to destinations that fulfilled their expectations than those that did not. Moreover, satisfied visitors are a key source of information through word of mouth as explained in section 1.9.

Visitor rating determines the choice of a destination where to undertake a holiday or vacation in comparison to others.

5.1 Tourist visitors rating of services and facilities

Key services and facilities that are part of the visitors' travel chain were selected for inclusion in the survey. The services and facilities selected are likely to have significant influence on the motivation of visitors to travel to the country.

The results on visitor rating of services and facilities in Table 5.1 show that a majority of visitors (41.6 percent) rated hotels in Uganda as good and 18.0 percent considered the hotels they stayed in excellent. 1.4 percent of the visitors considered the hotels poor. The relative satisfaction with the hotel services is attributed to the limited number of sophisticated upper class tourists who normally demand corresponding three star and higher class hotel services and facilities.

A majority of visitors (52.9 percent) also rated restaurants good. It is likely that this is due to the recent improvements with the opening up of a number of restaurants serving international Indian and Chinese dishes. It is also possible that local Ugandan dishes are appealing to the taste of visitors.

In addition, a majority of the visitors rated as good the following services: tours/excursions, tour guide services, local shopping, entertainment, shopping, visitor information, immigration, customs, banking and airport passenger handling.

Excellent majority scores were given to the Ugandan people (63.5 percent) and the country's National Parks (10.6 percent).

Fairly outstanding in the results are the significant scores against local transport, value for money and banking services. The problem with local transport could be the rampant traffic jams in Kampala, while the limited use of credit cards may explain the discontent with banking in Uganda.

A significant number of tourists (2.1 percent) were dissatisfied with the value for their money spent and rated it poor. This should be of immediate concern to tourism institutions and other service providers.

Table 5.1: Percentage distribution of service rating by category of service

Facility/Service		Rating					Not Stated	Total
		Excellent	Good	Adequate	Moderate	Poor		
1	Hotel	18.0	41.6	8.6	4.5	1.4	25.8	**100**
2	Restaurants	15.4	52.9	8.5	3.9	1.0	18.4	**100**
3	Tours/Excursions	12.7	16.2	2.1	0.6	0.2	68.3	**100**
4	Tour Guide Services	8.8	11.0	1.9	0.6	0.3	77.4	**100**
5	Local Transport	10.8	34.6	12.7	5.0	4.0	32.8	**100**
6	Entertainments	9.2	20.9	4.2	1.5	0.5	63.4	**100**
7	National Parks	10.6	7.2	1.3	0.3	0.1	80.6	**100**
8	Duty Free Shopping	2.1	6.3	2.0	0.6	0.4	88.5	**100**
9	Other Shopping	8.0	30.5	6.9	2.2	0.7	51.6	**100**
10	Visitor Information	6.6	23.3	6.6	4.4	3.1	55.9	**100**
11	Attitude of Immigration Officials	35.0	50.5	5.1	1.8	1.3	6.3	**100**
12	Attitude of Customs Officials	15.7	33.8	5.1	1.7	0.9	42.9	**100**
13	Banking Facilities/Forex Bureau	15.3	43.6	7.7	2.8	2.2	28.3	**100**
14	Airport Passenger Handling	17.0	30.0	3.9	1.0	0.9	47.2	**100**
15	Ugandan People	63.5	29.6	1.7	1.1	0.3	3.9	**100**
16	Value for Money	22.4	47.8	8.2	4.5	2.1	14.9	**100**

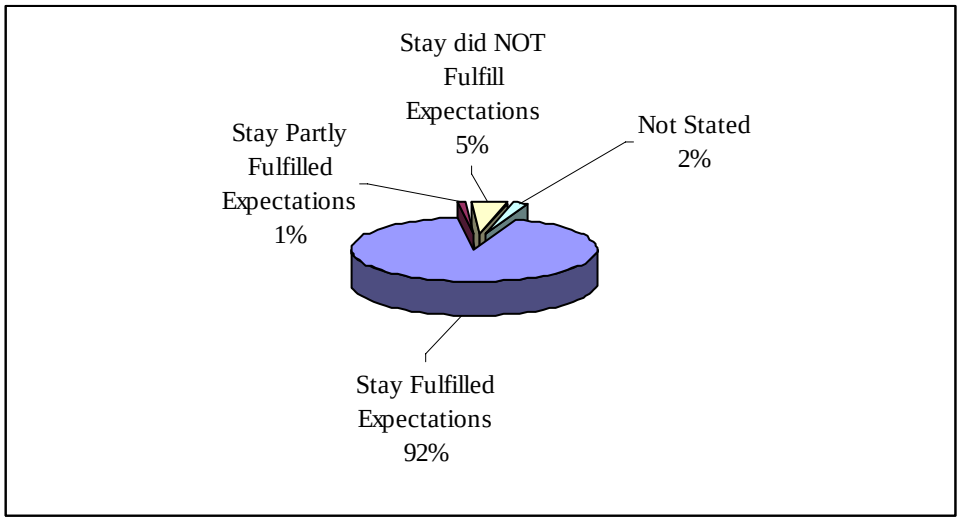
*n = 7735

5.2 Tourist visitors' fulfillment of expectations

Chart 10 represents the results of the analysis regarding the visitors' fulfillment of expectations. The Chart shows that 92 percent of the visitors fulfilled their expectations. This is positive and likely to motivate more visitors to come to the country.

On the other hand, 5 percent of the visitors did not fulfill their expectations, while 1 percent only partly did so.

Chart 10: Percentage distribution of tourists by fulfillment of expectations



*n = 7735

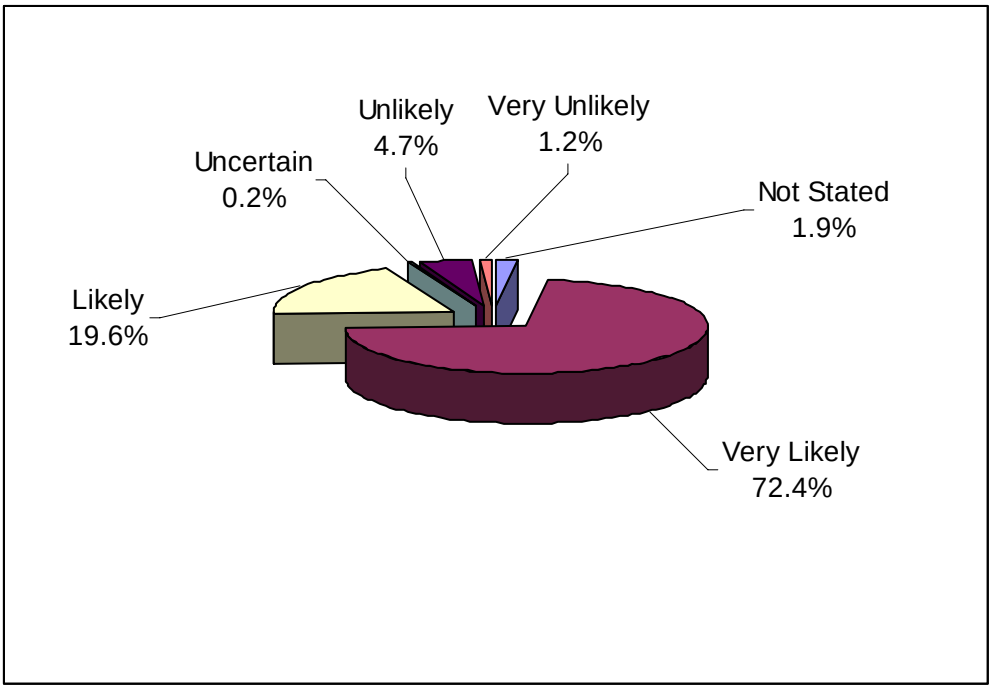
5.3 Tourists' anticipation of making repeated visits to Uganda

Visitors were asked about their likeliness to return to Uganda for a holiday in the next five years. The result was intended to provide indication on future business and popularity of the destination. It should be recalled that repeat visits make up a significant part of the country's tourist traffic (see section 1.8).

The results for the tourists' anticipated repeated visits represented in Chart 11 below show that 72.4 percent and 19.6 percent of the visitors are very likely and likely, respectively, to return to the country for a visit.

However, 1.2 percent, 4.7 percent and 0.2 percent are very unlikely, unlikely and uncertain, respectively, to return for a visit.

Chart 11: Tourists' anticipation of making repeated visits to Uganda



*n = 7735

5.4 Reasons for and against return visits to Uganda

The survey results also established the reasons for and against return visits. Table 5.2 giving the results shows that reasons for the repeated visits are: visiting friends and relatives, natural attractions/climate, friendly people, good security, entertainment/culture and religious pilgrimage.

Table 5.2: Percentage distribution of respondents by reasons given and likelihood of return visit in the next five years (Positive Reasons)

Positive Reasons	Very Likely	Likely	Uncertain	Unlikely	Very Unlikely	Total
Visiting Friends & Relatives	80.89	18.01	0.10	0.77	0.24	100
Natural Attractions/Climate	66.27	32.67	0.00	0.79	0.26	100
Friendly People	71.45	27.75	0.00	0.80	0.00	100
Good Security	90.20	9.80	0.00	0.00	0.00	100
Business	85.35	13.51	0.11	0.80	0.23	100
Official Visit	78.56	19.44	0.00	1.60	0.40	100
Entertainment/Culture	76.60	23.40	0.00	0.00	0.00	100
Local Dishes	78.95	21.05	0.00	0.00	0.00	100
Good Infrastructure	75.00	25.00	0.00	0.00	0.00	100
Stop Over/Transit	84.00	13.00	0.00	2.00	1.00	100
Religion/Pilgrimage	82.02	17.98	0.00	0.00	0.00	100
Education	75.81	14.52	0.00	9.14	0.54	100
Vacation/Holiday	76.42	22.87	0.00	0.51	0.20	100
Others	58.61	22.22	0.28	14.44	4.44	100

Table 5.3 shows that visitors expressed unwillingness to make repeat visits due to limited time, Uganda's distance from niche' markets and need to visit other countries. Others are: limited attractions, bad infrastructure and unfriendly services/Government officials.

Table 5.3: Percentage distribution of respondents by reasons given and likelihood of return visit in the next five years (Negative Reasons)

Negative Reasons	Uncertain	Unlikely	Very Unlikely
Limited Time	3.57	50.00	14.29
Far/Expensive to come to Uganda	2.61	67.32	15.69
Have to Visit Other Countries	2.70	69.59	12.84
Limited Attractions	0.00	25.00	35.00
Bad Infrastructure	0.00	0.00	0.00
Unfriendly Services/Government Officials	0.00	0.00	14.29

5.5 Tourist visitors' willingness to recommend Uganda to friends and relatives for a holiday visit

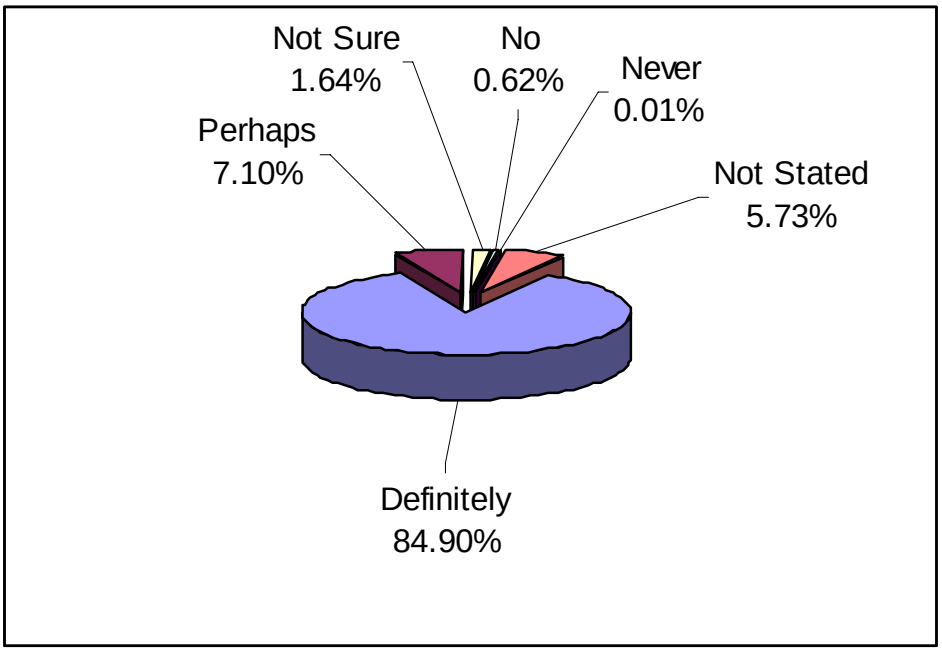
The willingness for tourists to recommend others to visit a destination arises out of satisfaction with services consumed there. Previous visitors are the most

effective tourism promotion tool. Persons intending to undertake travel are more likely to trust information from previous visitors than tourism institutions.

The results of the survey represented in Chart 5.3 indicate that about 85 percent of the visitors are willing to recommend Uganda to their friends and relatives for a visit.

7.1 percent of the tourist visitors were uncertain about recommending the country to friends and relatives.

Chart 11: Tourists willingness to recommend Uganda to friends and relatives for a holiday visit



*n = 7735

5.6 Tourist visitors' best memory/experience of Uganda

It is necessary to understand the destination's strongest opportunities for further development of tourism. These opportunities were obtained from the survey and results of the analysis are given in Table 5.3.

The results in Table 5.3 reveal that the hospitality of the Ugandan people, natural attractions and climate are the visitors' leading best memory and experience about Uganda. 52.8 percent of the visitors considered them to be their best memory/experience in the country.

The other key best memories/experiences for visitors to the country are culture/entertainment/education, local dishes/fruits, rafting, the source of the Nile and Gorilla Tracking.

It is likely that those admiring the country's transport/communication (2.66 percent), business environment (2.65 percent) and rapid infrastructure developments (2.57 percent) are repeat visitors from neighboring countries, who have visited the country during the bad historical times.

It is worthwhile noting that 2.27 percent of the visitors commended the country's security situation. This is attributed to the contrast between headline media reports on the Lords Resistance Army activities in northern Uganda and relative peace in other areas of the country. These visitors may also be comparing Kampala's security and safety of persons and property with the contrary situation in Nairobi, where a majority of them pass to come to the country.

Table 5.4: Percentage distribution of tourists' best memory/experience of Uganda

Best Memory/Experience		Percentage	Number of Cases
1	Ugandan people/Hospitality	35.53	2939
2	Natural attractions/climate	17.27	1429
3	Culture/Entertainment/Education	7.20	596
4	Local dishes & fruits	5.58	462
5	Rafting	3.92	324
6	Source of the Nile	3.55	294
7	Gorilla Tracking	3.20	265
8	Transport System/Communication	2.66	220
9	Markets/Business Environment	2.65	219
10	Infrastructure Development	2.57	213
11	Security	2.27	188
12	Bujagali Falls	1.95	161
13	Murchison Falls	1.34	111
14	National Parks	1.27	105
15	Religion/Pilgrimage	1.11	92
16	Hotel and Catering Services	1.09	90
17	Trucking	0.48	40
18	Lake Bunyonyi	0.48	40
19	Kasubi Tombs	0.42	35
20	Hygiene	0.36	30
21	Sipi Falls	0.29	24
22	Uganda Wildlife Education Centre	0.29	24
23	Lake Mburo NP	0.24	20
24	Cheap Destination	0.13	11
25	Sports	0.13	11
26	Health Programme	0.11	9
27	Prostitutes	0.07	6
28	Kidepo NP	0.07	6
29	Bulago Island	0.02	2
30	Nyero Rock Painting	0.01	1
31	Others	3.70	306

*n = 7735

5.7 Tourist visitors' most unpleasant experience in Uganda

Unpleasant experiences are a repellant to potential visitors to the country, which should receive immediate attention of the concerned institutions.

The results of the survey, in Table 5.5, show that a majority of the respondents (26.72 percent) considered poor transport system to be the most unpleasant experience in Uganda. Traffic jams in Kampala, lack of clear signage and absence of town bus and passenger rail transport services are likely to be the reason for the overwhelming visitor discontent with the country's transport system.

6.76 percent of the visitors indicated the country's hotel and catering services as their most unpleasant experience. Considering the key role of the hotel and catering sector in tourism, intervention to understand and correct its underlying problems is critical.

Other most unpleasant experiences indicated by tourists that were outstanding are: general unsatisfactory services, poor drivers/cyclists, pick-pocketing, poor infrastructure, poor hygiene, language barrier, insecurity and malaria.

It should, however, be noted that most of the unpleasant experiences that are greatly detrimental to growth of tourism in the country, are planning and management issues which can be sorted.

Table 5.5: Percentage distribution of tourists' most unpleasant experience in Uganda

Most Unpleasant Experience		Percentage	Number of Cases
1	Poor Transport System	26.72	933
2	Poor Hotel and Catering Services	6.76	236
3	Unsatisfactory Services	5.87	205
4	Speeding Drivers/Cyclists	5.21	182
5	Pick Pocketing	5.01	175
6	Poor General Infrastructure	4.41	154
7	Poor Hygiene	4.12	144
8	Language Barrier	3.75	131
9	Insecurity/High Crime Rate	3.61	126
10	Malaria/Insect Bites	3.55	124
11	Poor Integrity Levels	3.12	109
12	Poor Hospitality	3.06	107
13	Poverty	2.26	79
14	Environmental Pollution	2.00	70
15	Price Discrimination Against Tourists	1.80	63
16	Bad Weather	1.69	59
17	Absence of Toilets for Drop Calls	1.63	57
18	Money Changers	1.49	52
19	Bureaucracy	1.37	48
20	Poor Banking	0.95	33
21	Power Load Shedding	0.74	26
22	Absence of Use of Credit Cards/Poor Banking Services	0.66	23
23	Expensive Destination	0.52	18
24	Vendors and Hawkers	0.29	10
25	Poor Street Lighting	0.26	9
26	Politics	0.20	7
27	Child Abuse/Labour	0.17	6
28	Asian Shop Keepers	0.14	5
29	None	0.69	24
30	Others	7.95	277
Total		**100**	**3492**

5.8 Suggestions by tourists on how to improve tourism in Uganda

Tourist visitors were required to give suggestions for improving tourism in the country. This was thought important as it would yield genuine guide to improvement efforts within the sector.

A majority of the respondents (18.49 percent) suggested that marketing and advertising need to be improved upon for tourism in Uganda to grow. This means

that either more effort is required or that there are obvious flaws in the marketing and advertising strategies being implemented.

Tourists also suggested, in large numbers (17.75 percent), that improvement should be made on the country's infrastructure, particularly the roads.

Further improvement was suggested on transport system, hotel/restaurant services and security.

Another key outstanding suggestion was the need to provide updated guide books and more tourist information.

The entire list of suggestions provided in Table 5.5 should be reviewed to understand the priority concerns of tourists, with a view to implement them.

Table 5.6: Percentage distribution of suggestions to improve tourism in Uganda

Suggestions		Percentage	Number of Cases
1	Improve Marketing/Advertisement	18.49	1152
2	Improve Infrastructure/Roads	17.75	1106
3	Improve on Transport System	9.87	615
4	Improve Hotel/Restaurant Services	7.62	475
5	Improve on Security	5.43	338
6	Provide Updated Guide Books/More Tourist Information	4.45	277
7	Provide train services	3.90	243
8	Create more products or Improve Existing Ones	3.52	219
9	Multi-lingual Training	3.40	212
10	Advertise More	2.71	169
11	Maintain Hospitality	2.52	157
12	Improve on Hygiene	2.30	143
13	Improve Banking Services/ATM/Credit Credit	2.20	137
14	More Tourism Information Centers	2.13	133
15	Reduce National Park Charges	1.61	100
16	Reduce Hotel Charges	1.19	74
17	Improve Integrity	0.82	51
18	Control Environment Pollution	0.80	50
19	Reduce Visa Cost	0.61	38
20	Reduce Poverty	0.58	36
21	More Accessible Toilets for Drop Calls	0.53	33
22	Improve Beaches/Entertainment	0.27	17
23	Improve Electricity	0.26	16
24	Improve Variety of Shopping Commodities	0.19	12
25	Cab Pick-Pocketing	0.19	12
26	Limit Power Dams on the Nile	0.16	10
27	Streamline Park Entrance	0.14	9
28	Prohibit Street Kids	0.13	8
29	Reduce Bureaucracy	0.11	7
30	Encourage Eco-Tourism	0.11	7
31	Provide Maps in Game Parks	0.10	6
32	Sensitise Asia Shopkeepers	0.06	4
33	Regulate Prostitution	0.06	4
34	Others	5.78	360
Total		**100**	**n/a**

*n = 7735

CHAPTER SIX

RECOMMENDATIONS

Introduction

This is a consolidated report of the results of both the low and peak season Expenditure and Motivation Surveys conducted in 2003. The results were combined in order to provide reliable baseline data for planning, policy and decision making. The report has given insight into the general characteristics of the tourist visitors to Uganda, including providing detailed analysis of the relationships between them. The report reveals useful travel and expenditure patterns, which could be used to guide micro and macro level tourism planning. In addition, the report has provided analysis of motivational aspects necessary for improving tourism in the country.

However, the findings in the report are of value only when they are effectively applied to meet the objectives of the survey. Therefore, a number of general recommendations, related to the findings in this report, are proposed here below to guide efforts aimed at developing the country's tourism.

6.1 Recommendations for enhancing the country's tourism traffic and receipts.

The earlier Expenditure and Motivation Survey Report of 2001 was based on an experimental survey conducted during the peak season of that year in order to obtain some idea on the tourism situation then. This 2003 Consolidated Low and Peak Season Expenditure and Motivation Survey Report has now provided reliable information that has until now been lacking on the general characteristics and travel and expenditure patterns of tourists visiting Uganda.

The key objective of these research efforts is to provide information for planning in order to enhance growth of tourism traffic and receipts. The growth in tourism

traffic and receipts has related positive multiplier effects relating to income, employment, foreign exchange and Government revenue.

It is, therefore, important to synthesize the results of the survey for use in developing realistic strategies that will yield the desired economic benefits. For instance, the results show that a majority of holiday tourists stay for an average of 8-14 days and spend an average of US dollars 60-100. Considering that the number of visitors and length of stay are the key factors that directly influence tourist expenditure, it is necessary for tourism institutions to review the packages, with a view to providing more paying tours. It may be possible to increase the average expenditure, while maintaining the average length of stay of 8-14 days for holiday visitors, by attracting the upper class tourists.

The analysis has also revealed that, apart from the case of Britain, a majority of the visitors to Uganda from the other leading tourist source markets of Kenya, USA, Tanzania and South Africa are actually traveling to the country for business and official work. This indicates that more marketing work is required to increase the number of visitors coming from these countries to Uganda for a holiday.

The survey results have further shown that a majority of Uganda's tourists are students, which explains the low revenue generated from tourism. It is necessary to design strategies that will attract well-paid professionals and pensioners, through highly focused marketing among these groups in order realize higher tourism returns. This can be achieved by learning from experience and best practices of other countries and tourism institutions such as Kenya, South Africa and Tanzania.

Overall, it is necessary to streamline the various organizational and structural issues that continue to hinder implementation of appropriate marketing strategies.

In addition, it is envisaged that the end of the current civil wars in the great Lakes region, including the one in northern Uganda, will offer opportunity for rapid increase in tourism traffic and receipts for the country.

6.2 Recommendations on motivational aspects

The results of the survey have indicated motivation and facilitation issues that require attention of tourism institutions and Government. Issues pointed out regarding infrastructure and services such as poor transport systems, poor hotel and catering services and unsatisfactory services in general require appropriate attention in order to ensure development of sustainable tourism.

On the other hand, planning tourist facilities is a micro-level concern of tourism managers, requiring understanding the needs and preferences of the tourists. Tourist needs and preferences are influenced by various factors including age (lifecycle), sex, nationality, level of affluence/education, occupation, lifestyle (income), etcetera. These factors were analyzed and their relative importance established in this report. It is, therefore, recommended that the findings be used as applicable in planning, design and improvement of facilities and services.

It is recognized that the tourism private sector in Uganda is still weak. The argument for self regulation in a developing country is also weakened by the principal of conflict of interest. Therefore, Government or other mandated organizations ought to play the necessary role of regulating and inspecting activities of the sector, with a view to ensuring that tourists receive value for their money. The need to streamline and strengthen these functions is long overdue and immediate attention is required for quality assurance in tourism service delivery.

The report highlights various levels of service dissatisfaction. These are detrimental to growth of tourism in the country. The key solution to poor services is training as the sustainable strategy for ensuring professionalism and provision

of quality services. It is necessary for employers to provide input into the design of the tourism training curriculum. Appropriate curriculum design and Government regulation should ensure quality tourism services, that will motivate more visitors to visit the country.

6.3 Recommendations for strengthening research and monitoring

This report has provided key indicators to various aspects of tourism in Uganda, including benefits of the sector to the economy. It is not possible to understand these benefits and status of the sector without measurement. It would, for instance, be impossible to know the average tourist expenditure or the total tourism receipts of the country, without the surveys conducted. Tourism stakeholders would not know the measurable status of tourism activities without research and regular collection and analysis of arrivals data. Planning for tourism development in such a situation becomes a nightmare as policy makers and planners grapple in the dark.

Government and tourism institutions, therefore, need to invest in data collection and research to ensure good planning and making of informed decisions.

It is recognized that the Ministry of Tourism, Trade and Industry (MTTI), with the support of the ended EU Tourism Support project and the currently on-going World Bank funded PAMSU project, have significantly invested in developing tourism statistics. A tourism data base was established and baseline statistics are now available to guide key policy and planning issues within the sector. The data base comprises information on; all accommodation establishments found in Uganda by December 2002; information on all tourism related non-accommodation establishments found in Uganda by December 2002; and information on all potential and exploited attractions in Uganda.

In addition, MTTI implemented a high season expenditure and motivational survey in 2001, to provide a quick insight into the state of affairs in the sector

before undertaking the main low and peak season surveys whose results are consolidated in this report.

MTTI also provided substantial support to tourism statistics activities at UBOS, including designing new East African Community arrival and departure cards. The cards were approved by the Heads of State Summit in 2002 and their implementation by the Immigration Department, Ministry of Internal Affairs was still being awaited by the time of completing this report.

However, a lot still remains to be done in the area of tourism statistics in order to ensure regular availability of data. For instance, sustainable capture and reporting of accommodation statistics still eludes MTTI and UTB. Also, UBOS still collects and analyses incomplete tourist arrivals data due to the failure by the Immigration Department to implement the new East African cards. MTTI also continue to grapple with lack of capacity to fully analyze data provided by UBOS. The analysis required includes producing forecasts using standard statistical techniques.

Other analyses required involve producing income, output and employment multipliers, which describe the impact of economic tourism more precisely. Establishing a Tourism Satellite Account will, gradually though, facilitate development of many of these key economic indicators.

Lastly, it should be noted that the results contained in this consolidated expenditure and motivation report are valid only for a limited period of time. Due to the rapid economic changes taking place in the country, it is anticipated that these results will cease to have the desired relevancy four years from the time of this report. It is, therefore, recommended that another set of low and peak season surveys be conducted in 2006.