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UGANDA BUREAU OF STATISTICS AND MINISTRY OF TOURISM WILDLIFE AND ANTIQUITIES

UGANDA TOURISM SATELLITE ACCOUNT REPORT 2025

Measuring the contribution
of tourism to the economy of Uganda
for calendar year 2023

MARCH 2025

UGANDA TOURISM SATELLITE ACCOUNT REPORT FOR THE YEAR 2025

This Publication presents the direct contribution of Tourism to the economy of Uganda for the calendar year 2023.

This work is a product of the Staff of Ministry of Tourism, Wildlife and Antiquities and the Uganda Bureau of Statistics with financial support from the Competitiveness and Enterprise Development Project, World Bank.

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UGANDA TOURISM

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FOREWORD

Tourism continues to be a vital pillar of Uganda's economy, playing a crucial role in driving economic growth, job creation, and foreign exchange earnings. The Uganda Tourism Satellite Account (TSA) for the year 2023 highlights the remarkable recovery and growth of the tourism industry. This report, developed through the collaborative efforts of the Uganda Bureau of Statistics (UBOS) and the Ministry of Tourism, Wildlife and Antiquities (MTWA), provides a comprehensive and internationally comparable assessment of tourism's direct contribution to Uganda's economy.

In 2023, Uganda witnessed a significant surge in inbound tourism, with international visitor arrivals increasing by 56.5% to reach 1,274,210 visitors, contributing to an inbound tourism expenditure of UGX 3,818.6 billion, marking a 48% increase from 2022. Domestic tourism also experienced robust growth, with the number of domestic visitors rising to 2.80 million, reflecting a 5.2% increase and leading to a substantial 38.5% growth in domestic tourism expenditure, reaching UGX 5,090.7 billion.

The sector's economic contributions are further underscored by the impressive growth in Tourism Direct GDP (TDGDP), which rose by 34.6% to UGX 6,061 billion, directly accounting for 3.2% of Uganda's GDP, up from 2.5% in 2022. Tourism also played a pivotal role in employment, providing direct jobs to 803,691 individuals, a 31.6 % increase from the previous year, representing 7.2% of total national employment.

Of notable significance is the positive impact of tourism on Uganda's balance of payments. In 2023, tourism exports surpassed imports, generating a surplus of UGX 2,759.0 billion, compared to UGX 1,673 billion in 2022. Tourism exports accounted for 15.8% of total exports and 69.7% of service exports, reinforcing the sector's contribution to foreign exchange earnings.

Investments in tourism-related infrastructure and services have also been robust, with the Gross Fixed Capital Formation (GFCF) in the sector amounting to UGX 7,458 billion, representing 17.2% of the national total. These investments, coupled with increased government spending on tourism promotion and public administration, have laid a solid foundation for sustainable growth.

The achievements captured in this report are a testament to the collaborative efforts of various stakeholders, including government agencies, private sector actors, and development partners.

As Uganda continues to position itself as a premier destination for both leisure and business travelers, it is imperative to build on these gains through sustained investment in infrastructure, innovation in tourism offerings, and promotion of responsible tourism practices that preserve our natural and cultural heritage.

On behalf of the Ministry of Tourism, Wildlife and Antiquities, I extend my gratitude to all contributors to this report. We remain committed to leveraging data-driven insights to steer the growth of a resilient, inclusive, and sustainable tourism industry that benefits all Ugandans.



Tom R. Butime, MP

Minister of Tourism, Wildlife and Antiquities

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PREFACE

The Tourism Satellite Account (TSA) is an accounting framework established by the United Nations (UN) to measure goods and services related to tourism using international standards, concepts, classifications, and definitions. The TSA offers stakeholders—governments, businesses, and citizens—reliable data for policy-making and tourism business strategies.

The 2023 Uganda Tourism Satellite Accounts (TSAs) were developed in alignment with the **Tourism Satellite Account: Recommended Methodological Framework (TSA: RMF 2008)** of the United Nations World Tourism Organization (UNWTO). This methodology examines tourism and its economic linkages within the **System of National Accounts (SNA 2008)**. By doing so, it quantifies tourism's contribution to national economic aggregates and enables comparisons with other industries.

The TSA provides an internationally standardized approach to assessing the scale of tourism-related production and its interconnections across various sectors. It offers a comprehensive database that highlights tourism's role in the economy, presenting a clearer understanding of its performance and the benefits it delivers. Such insights are essential for making informed, effective policy decisions to guide the industry's future development.

The “tourism industry” is defined from the demand side by measuring the consumption of various tourism-related commodities. This approach establishes a link to the supply side by identifying tourism-specific goods and services. Industries characteristic of or connected to tourism are then identified based on their reliance on tourism-generated demand.

The Uganda Bureau of Statistics, in collaboration with the Ministry of Tourism, Wildlife and Antiquities, extends its appreciation to all Ministries, Departments, and Agencies (MDAs) that supported the compilation of this TSA. Special gratitude is owed to the World Bank, particularly the **Competitiveness and Enterprise Development Project (CEDP)**, for providing financial support during the compilation process. The Bureau also acknowledges the technical working committee's efforts in consolidating this report. Constructive feedback from stakeholders is welcomed to strengthen data production systems further and enhance the development of this valuable resource.



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Special appreciation goes to the TSA Technical Committee for their dedicated efforts in data compilation and report drafting. We are particularly grateful to Ms. Alizik Kaudha Lubega, Director of Macroeconomic Statistics at UBOS, and Mr. Lyadda I. Manga, Assistant Commissioner, Finance and Planning at MTWA, for their exemplary leadership in steering the technical teams.

We also acknowledge the World Bank's Competitiveness and Enterprise Development Project (CEDP) for their financial and technical support, which was instrumental in this endeavor.

To all stakeholders, technical staff, and partners involved in the production of this report, we express our heartfelt appreciation for your commitment and collaboration.

EXECUTIVE SUMMARY

The Tourism Satellite Account (TSA) is an accounting framework adopted by the UN Tourism formerly United Nations World Tourism Organization (UNWTO), and was designed to measure goods and services associated with tourism according to international standards, concepts, classifications, and definitions. The direct economic contribution of Tourism to the economy of Uganda for the year 2023 was measured through the compilation of the 10 TSA tables. The ten tables were systematically compiled using primary and secondary data. It analysed all aspects of demand for goods and services associated with the tourism sector within the economy, monitored the operational interface of the supply of such goods and services, and evaluated how supply interacts with other economic activities.

The Uganda Tourism Satellite Account Report for the year 2023 establishes the direct contribution of Tourism to the economy using the recommended Tourism Satellite Account methodology. The specific goals were to;

1. Estimate tourism demand and supply,
2. Assess value added by tourism activities to the economy,
3. Establish the level of employment generated by the tourism activities,
4. Measure the gross fixed capital formation by the sector, and
5. Measure the collective consumption of tourism services by the Government.

The Uganda TSA was developed to respond to these objectives by establishing macroeconomic aggregates that describe the size and economic contribution of different forms of tourism. This required gathering data on tourism consumption (inbound, Domestic and Outbound tourism), domestic supply and imports, and compilation of detailed production accounts of the tourism industries.

The compilation of the UTSA for the year 2023 was based on the Tourism Satellite Account: Recommended Methodological Framework (TSA: RMF 2008) and International Recommendations for Tourism Statistics (2008). The compilation of the Uganda TSA used the following data sources; the Tourism Expenditure and Motivation Survey 2023, Uganda National Household Survey 2023/24, Bank of Uganda Outbound Travel Survey (2023), Arrival and Departure Statistics (UBOS) and Macroeconomic aggregates from National Accounts.

In 2023, Uganda welcomed 1,274,210 international visitors (inbound tourism), who spent an average of 7.6 nights. The total amount of inbound tourism expenditure (tourism exports) in 2023 was UGX 3,818.6 billion, a significant increase from UGX 2,571.53 billion in 2022 (TSA Table 1).

Uganda's domestic tourism has steadily grown, with visitor numbers rising from 2.66 million in 2022 to 2.80 million in 2023, a 5.2 percent increase. Domestic tourism expenditure was estimated at UGX 5.09 trillion in 2023, up from UGX 3.68 trillion in 2022, contributing 4.0% to Household Final Consumption Expenditure (HFCE) (TSA Table 2).

A total of 711,265 Ugandan Residents travelled abroad for a foreign trip in 2023 (Outbound Tourists) mainly for personal visits such as Holiday and Leisure. Outbound tourism expenditure (tourism imports) rose by 17.9%, from UGX 899 billion in 2022 to UGX 1,059.7 billion in 2023. (TSA Table 3).

Internal tourism expenditure of Uganda was estimated at UGX 8,909.4 billion in 2023, 42.6 percent higher compared with UGX 6,246.8 billion in 2022 (covering both international and domestic tourism expenditure) (TSA Table 4). The 2025 UTSA report estimates the internal tourism consumption at UGX 9,157.1 billion in 2023 compared to 6,668.2 billion in 2022, a 37.3 per cent (or UGX 2,488.9 billion) increase from 2022 covering internal tourism expenditure plus other components of tourism consumption amounting to UGX 247.8 billion in 2023 compared to 421.4 billion in 2022 mainly by inbound tourists. (TSA Table 4).

Internal Tourism Consumption contributed 6.0 percent to Household Final Consumption Expenditure (HFCE) and Exports in 2023, up from 4.8 percent in 2022.

The total output at basic prices for tourism industries in 2023 was estimated at UGX 12,026 billion, a 12.4 percent increase from UGX 10,695 billion in 2022. This growth was driven primarily by increased food and beverage services, air and road passenger transport services and accommodation services which collectively accounted for 89.1 percent of the total tourism industry output. The Gross Value added for tourism-related industries was estimated at UGX 7,311 billion in 2023 compared to UGX 6,592 billion in 2022, representing a 10.9 percent increase (TSA Table 5).

Uganda's tourism exports exceeded tourism imports, resulting in a UGX 2,759 billion trade surplus in 2023, up from UGX 1,673 billion in 2022. This improvement highlights tourism's positive contribution to Uganda's balance of payments position, despite the overall goods and services balance registering a deficit of UGX 18,035 billion. Tourism Exports accounted for 15.8 percent of total exports and 69.7 percent of service exports, up 65 percent from 2022. Tourism imports accounted for 8 percent of service imports and 2.5 percent of total imports. (TSA Table 6).

Tourism Direct GDP (TDGDP) reached UGX 6,061 billion in 2023, marking a 34.6 percent increase from UGX 4,502 billion in 2022, and contributing 3.2 percent to Uganda's GDP (up from 2.5 percent in 2022). This improvement was mainly driven by increased demand and supply of accommodation services. The Tourism Direct Gross Value Added (TDGVA) increased by 26.5 percent to UGX 5,692 billion in 2023, contributing 3.2 percent to national GVA, up from 2.6 percent in 2022 (TSA Table 6).

Tourism-generated taxes increased to UGX 370 billion in 2023, contributing 2.6 percent to total tax revenue, up from UGX 280 billion (2.1 percent) in 2022. This highlights tourism's growing importance to Uganda's fiscal base, with a notable UGX 90 billion year-over-year increase. (TSA Table 6)

In 2023, Uganda's internal tourism demand increased to UGX 9,157 billion, raising the demand-to-supply ratio to 68.9% (up from 54.8% in 2022), indicating stronger domestic consumption of tourism services. Approximately 69% of available tourism services were utilized, reflecting improved alignment between supply and traveler demand.

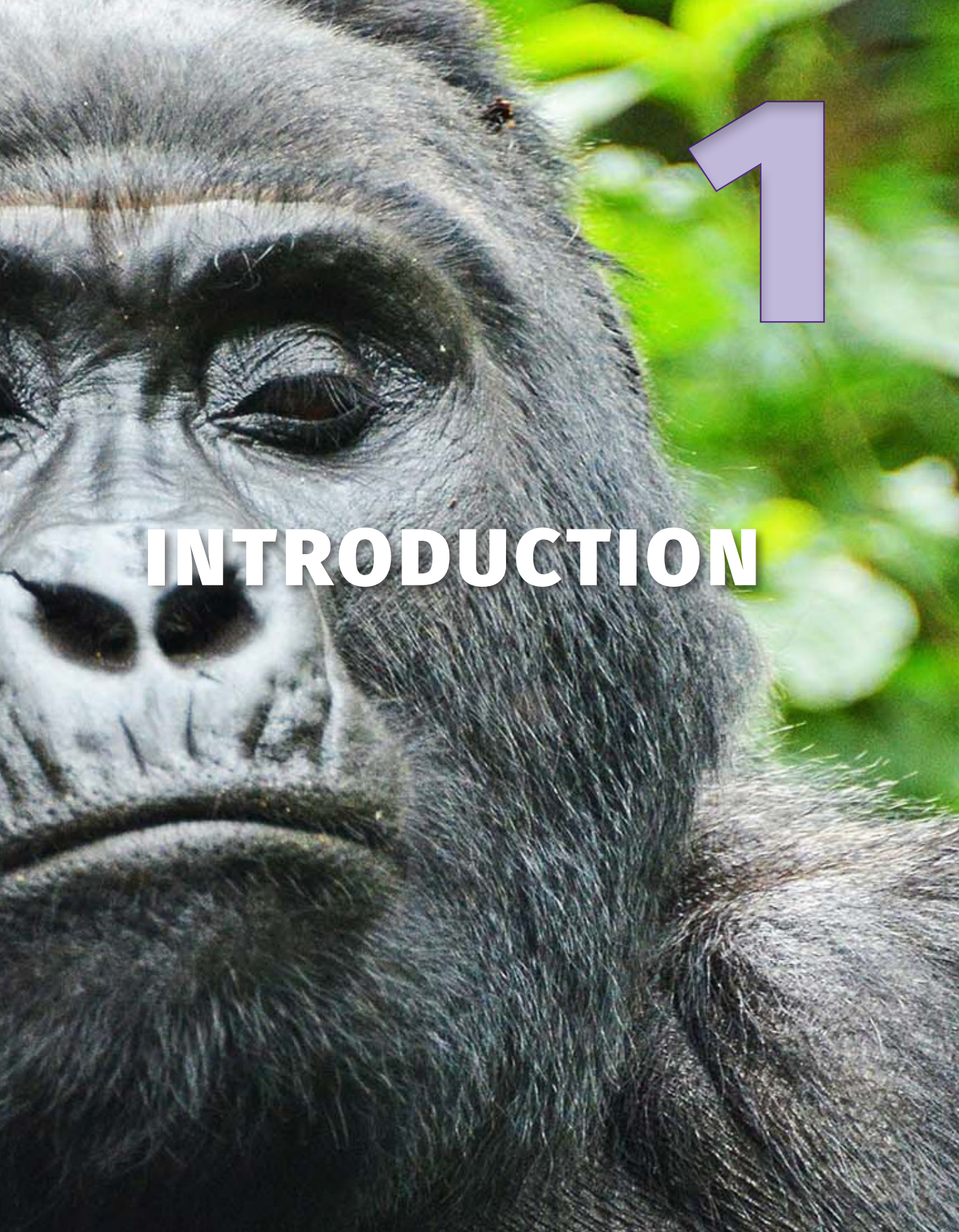
Direct employment in tourism grew by 31.6 percent, adding 192,885 new jobs, bringing total direct employment to 803,691 workers in 2023, up from 610,806 workers in 2022. Tourism directly accounted for 7.2 percent of total employment, ranking as the fifth highest employer in the country, after Agriculture, Trade, Manufacturing and Transport and storage. 52.2 percent of tourism workers were self-employed and the industry was male dominated, with 75.1 percent. (TSA Table 7)

Total Tourism Gross Fixed Capital Formation (GFCF) amounted to 7,458 billion in 2023 representing 17.2 percent of the total GFCF in the economy. Tourism's share in the GFCF has declined from 18.3 percent in 2022, a 1.1 percentage point drop. (TSA Table 8)

Tourism Collective Consumption was estimated at UGX 356.9 billion in 2023, up 33.8 percent from UGX 266.7 billion in 2022. This growth was driven by increase in educational support services, tourism promotional services and tourism public administration services. Tourism contributed 0.7 percent to total collective consumption in 2023 (TSA Table 9).

The Uganda TSA 2023 underscores the growing significance of tourism in Uganda's economy with notable increase in GDP contribution, employment, exports, tax contributions and internal tourism expenditure.





INTRODUCTION

CHAPTER 1: INTRODUCTION

1.1 BACKGROUND

Uganda's Tourism Satellite Account (TSA) development process began in 2017, led by the Ministry of Tourism, Wildlife and Antiquities (MTWA) in collaboration with the Uganda Bureau of Statistics (UBOS) and supported by the United Nations Economic Commission for Africa (UNECA). MTWA, UBOS, and the Bank of Uganda conducted surveys, and a consultant hired through a UNECA-supported capacity-building project analyzed the data. This process was concluded in March 2023 with the release of Uganda's first TSA report, focusing on 2019 as the base year. The delay however came in handy as it provided an insight into tourism economic performance prior to COVID-19 pandemic.

A multi stakeholder approach was used with a TSA Committee comprised of the Bank of Uganda (BOU), Uganda Revenue Authority (URA), Uganda Tourism Board (UTB), Uganda Wildlife Authority (UWA), National Planning Authority (NPA), Uganda Investment Authority (UIA), Makerere University Kampala (MUK) and Uganda Tourism Association (UTA) constituted.

The second TSA report 2022 was also produced for Uganda which helped to highlight tourism recovery from the pandemic.

This report is the third edition of the Uganda TSA, produced with support from the World Bank's Competitive and Enterprise Development Project- Additional Funding (CEDP-AF). The process brings together several members of the TSA Committee with various roles of data collection, data compilation and analysis to come up with the report. Recognizing existing systems for tracking tourism demand, the TSA aims to provide a comprehensive measure of tourism's contribution to the economy. Because it's an internationally applied tool, TSA enables comparison of tourism performance with other countries.

The report's compilation is divided into two key principles: Providing a detailed analysis of demand for goods and services associated with visitor activities, and observing the operational interface between demand and supply within the economy, and describing how supply interacts with other economic activities. By adopting this approach, the TSA offers a detailed understanding of tourism's economic impact, informing policy and decision-making processes.

1.2 RATIONALE FOR DEVELOPMENT OF THE UGANDA TSA

Tourism is a vital sector in Uganda's economy, as emphasized in the Third National Development Plan (NDP III). Recognizing its potential, Uganda has adopted the Tourism Satellite Account (TSA) methodology to systematically measure the direct economic impact of tourism. This includes assessing tourism expenditure, its contribution to GDP, employment, and related industries.

As tourism is comprised of multiple sectors, a specialized approach is necessary. Utilizing the internationally accepted methodologies developed by the United Nations World Tourism Organization (UNWTO), the 2025 Uganda TSA provides estimates of tourism's impact on the national economy for calendar year 2023.

This report serves as a crucial tool for policymakers, investors, and stakeholders, offering data-driven insights to inform decision-making and support sustainable tourism development. The Uganda Tourism Satellite Account Report 2025 plays a pivotal role in analyzing the growth and development of the tourism sector.

By providing accurate and up-to-date information, this report will guide policymakers and stakeholders in making informed decisions that promote sustainable tourism growth, economic development, and preservation of Uganda's rich natural and cultural heritage.

1.3 COMPONENTS OF THE TSA

The Tourism Satellite Accounts (TSA) is a statistical framework that measures the direct economic impact of tourism. It consists of 10 tables, designed to provide accurate and comprehensive data in line with the United Nations World Tourism Organization's (UNWTO) methodological framework.

1. TSA Table 1 Inbound Tourism: Non-Resident Consumption; Analyze the demand or consumption made by international visitors in Uganda.
2. TSA Table 2 Domestic Tourism Expenditure: Examines the expenditure components of domestic visitors, including estimates of pre-trip expenses for outbound travel.
3. TSA Table 3 Outbound Tourism Expenditure: Measures the amount of goods and services consumed by Ugandans outside the country.
4. TSA Table 4 Total Tourism Internal Expenditure: Presents the total expenditure for tourism purposes by both residents and non-residents within Uganda's economic territory.
5. TSA Table 5 Supply Table: Displays the total commodity production by industry in a matrix form, regardless of who consumes the products.
6. TSA Table 6 Core Table: Reconciles internal tourism consumption and domestic supply, presenting a synthesis of domestic supply for each tourism characteristic product.
7. TSA Table 7 Employment in the Tourism Industry: Provides information on employment in the tourism sector.
8. TSA Table 8 Investments in the Tourism Industry: Presents data on investments in the tourism sector.
9. TSA Table 9 Tourism Collective Consumption: Analyzes collective consumption of tourism-related goods and services.
10. TSA Table 10 Non-Monetary Indicators: Presents important non-monetary indicators associated with tourism.

1.4 THE IMPORTANCE OF TSA

The Uganda Tourism Satellite Account (TSA) for 2023 is a vital tool that provides stakeholders with accurate and timely data to inform policy and business strategies in the tourism sector. The TSA's implementation is crucial for addressing several key objectives:

- Tracking National Development: Monitoring progress towards achieving the third National Development Plan and other strategic government plans.
- Standardizing Tourism Data: Generating comparable tourism economic data, such as Tourism Direct GDP, to align with other economic statistics.
- Employment and Job Creation: Identifying employment opportunities in the tourism value chain and assessing tourism's role in job creation.
- International Comparison: Providing a standard measure of tourism outputs for international comparison.
- Analyzing Tourism's Economic Impact: Developing quantitative estimates of Tourism Value Added to analyze tourism's economic impact.
- Extending Tourism's Role: Highlighting tourism's role in various industries that produce goods and services for visitors.
- Informing Policy and Decision-Making: Generating and sharing tourism information to guide policy formulation, strategic planning, and decision-making.

1.5 AVAILABLE DATA SOURCES

The compilation of the Uganda TSA for the year 2022 utilized the following data sources as outlined below:

1. UBOS Uganda Supply and Use Table (SUT), 2016/17
2. MTWA Statistical Abstract 2023
3. MTWA Tourist Expenditure and Motivation Survey (TEMS), 2023
4. UBOS National Labor Force Survey, 2021
5. UBOS Uganda National Household Survey, 2022/23
6. UBOS Statistical Abstract, 2024
7. MTWA Annual Tourism Development Programme Performance Report, FY 2023/24
8. UBOS Quarterly Accommodation Statistics Surveys, 2023
9. UBOS Arrivals and Departure Statistics, 2023
10. BOU Quarterly Outbound Survey, 2023
11. MTWA Tourism Statistical Abstract, 2023
12. BOU Balance of Payments (BOP) Report, 2023
13. UBOS Midyear Population Projections, 2023
14. UBOS Consumer Price Index Calendar Year series, 2023
15. UBOS National Accounts Calendar Year series, 2023
16. MOFPED Approved Estimates of Revenue and Expenditure (Recurrent and Development), FY 2023/24
17. UNRA Annual Performance Report, 2023/24
18. MOFPED Expenditure Local Government releases, FY 2023/24
19. Uganda Tourism Association Annual Report, 2023.

1.6 METHODOLOGY

The Tourism Satellite Account (TSA) is compiled annually, following the guidelines outlined in the Uganda TSA Compiler's Manual 2019. This manual was developed by the Uganda TSA Committee, ensuring consistency with:

- Tourism Satellite Accounts Recommended Methodological Framework 2008 (UNWTO)
- International Recommended Methodological Framework 2008 (UNWTO)
- Systems of National Accounts 2008 (United Nations Statistical Commission)

This rigorous framework guarantees the accuracy and reliability of the TSA data.

A person with a backpack is walking away on a rustic wooden bridge made of logs, surrounded by dense tropical forest with many ferns and moss-covered trees.

2

INBOUND TOURISM DEMAND

CHAPTER 2: TSA TABLE 1: INBOUND TOURISM

2.1 INTRODUCTION

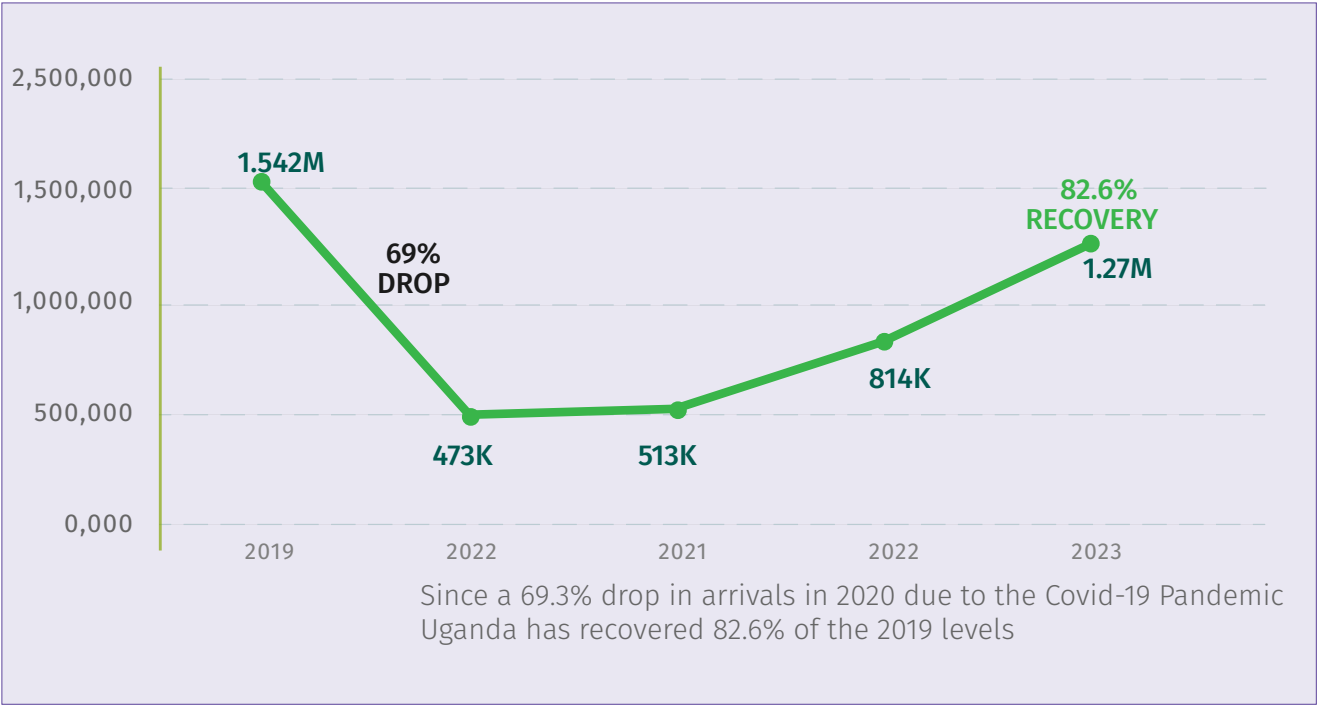
According to the International Recommendations for Tourism Statistics (IRTS), 2008, Inbound tourism, comprises the activities of a non-resident visitor within the country of reference on an inbound tourism trip. An inbound trip refers a visitor's journey from the moment they arrive in a country until they depart. These visitors are defined as non-residents traveling for less than a year in the country's economic territory, in this case Uganda, for any purpose other than being employed by an entity/organization in the country.

This section presents arrivals of overnight and same day visitors, their length of Stay and Expenditures within Uganda in 2023. The total number of Inbound Visitors is an aggregate of the Excursionists (Same-Day Visitors) and the Tourists (Overnight Visitors).

2.2 VISITOR ARRIVALS, 2019-2023

In Uganda, inbound tourism statistics are mainly computed from two sources i.e. Arrival and Departure statistics from UBOS and the Tourist Expenditure and Motivation Survey from MTWA. Visitor Arrivals in 2023 increased by 56.5 percent from 2022. However, this was still 17.4 percent below the 2019 levels. In 2023, 1,274,210 visitors travelled to Uganda as shown in Figure 1 below. The growth in tourist arrivals to Uganda was strongly backed by positive growth recorded from Mainland Africa and growth in the country's traditional Overseas source markets such as UK, USA and India.

Figure 1: Visitor Arrivals to Uganda, 2019-2023



Source: Arrival and Departure Statistics (UBOS), 2023, Annual Tourism Development Programme Performance Report FY2023/24.

Additionally, out of the 1,274,210 visitor arrivals, 184,854 (14.5%) were Excursionists (same day visitors) while 1,089,356 (85.5%) were Tourists (Overnight Visitors).

Figure 2: Regional Distribution of Tourists to Uganda 2023



Source: Arrival and Departure Statistics (UBOS), 2023

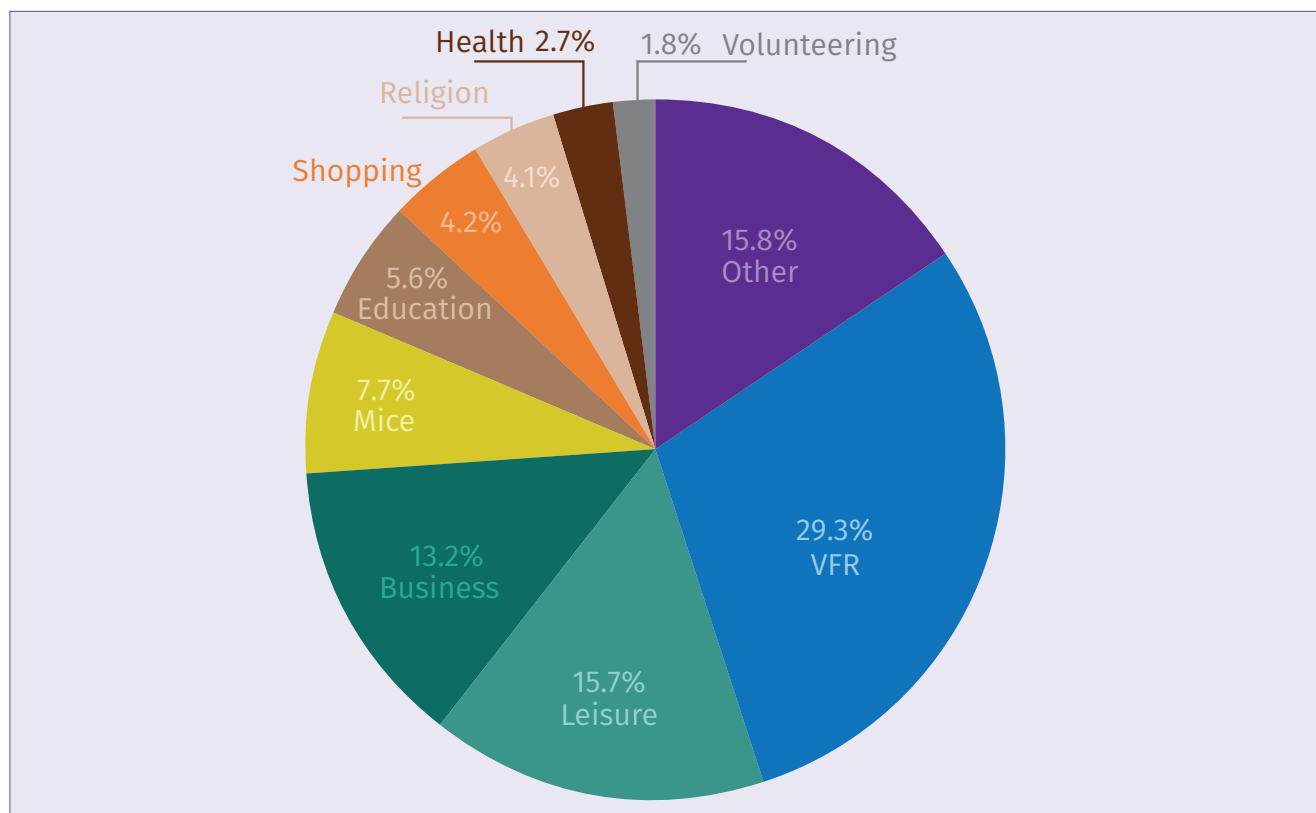
Overseas arrivals accounted for 10.8% of total visitor arrivals to Uganda in 2023. Asia (4.4%), Europe (3.1%) and the Americas (1.9%) continue to be the biggest contributors of overseas tourist arrivals. Tourist Arrivals from Africa were 1,136,216 in 2023 accounting for 89.2% of all inbound Tourists compared to 714,576 in 2022 which is a 59% increase.

2.3 VISITOR’S MAIN PURPOSE OF VISIT

In 2023, the highest proportion of visitors (58.2%) came for the three purposes of visiting friends and relatives (VFR) with 29%, Leisure with 15.7% and Business with 13.2%.

The percentage of Leisure visitors increased from 12% to 16% in 2023, highlighting the investment effort in marketing by the Government of Uganda. Market share of MICE visitors increased to 8% in 2023, up from 5% in 2022. The percentage of Business and VFR dropped in 2023 compared to 2022. Overall, the data indicates significant increase in most of the purposes of visit categories, especially in Leisure, MICE, Volunteering, and Others.

Figure 3: Purpose of Visit of Tourists in Uganda, 2023



Source: Arrival and Departure Statistics (UBOS), 2023, Annual Tourism Development Performance Report FY2023/24.

2.4 VISITOR'S LENGTH OF STAY

In 2023, tourists who visited Uganda stayed for an average of 7.6 nights compared to 7.4 nights in 2022. This is below the average length of stay of 8.3 nights in 2019. Business tourists stayed longest (9.7 nights on average) in 2023, a significant increase from 2022 (7.4 nights on average), while the average stay of Leisure visitors dropped from 10.5 nights on average in 2022, to 7.5 nights on average in 2023. Those visiting friends and relatives (VFR) decreased from spending an average of 9.7 nights in 2022 to 9.2 nights in 2023.

Table 1: Visitor's length of Stay, 2023

Purpose of visit	Mean Length of Stay (Nights)		
	2019	2022	2023
Business & Professional	3.0	7.4	9.7
Holidays, Leisure & Recreation	7.6	10.5	7.5
Other	21.3	4	3.5
VFR	6.4	9.7	9.2
GRAND TOTAL	8.3	7.4	7.6

Source: Tourism Expenditure and Motivation Survey Report, 2023 (MTWA)

2.5 INBOUND TOURISM EXPENDITURE (TOURISM EXPORTS)

Inbound tourism expenditure is the tourism expenditure of a non-resident visitor within the economy of reference, in this case Uganda.

The total inbound tourism expenditure/value of tourism exports in 2023 amounted to UGX 3,818.6 billion, which was 48 percent higher than the UGX. 2,571.53 billion recorded in 2022, but still lower than the UGX 4,580.40 billion in the year 2019.

Table 2: Inbound Tourism Expenditure by Product, Uganda at Current prices, 2019-2023

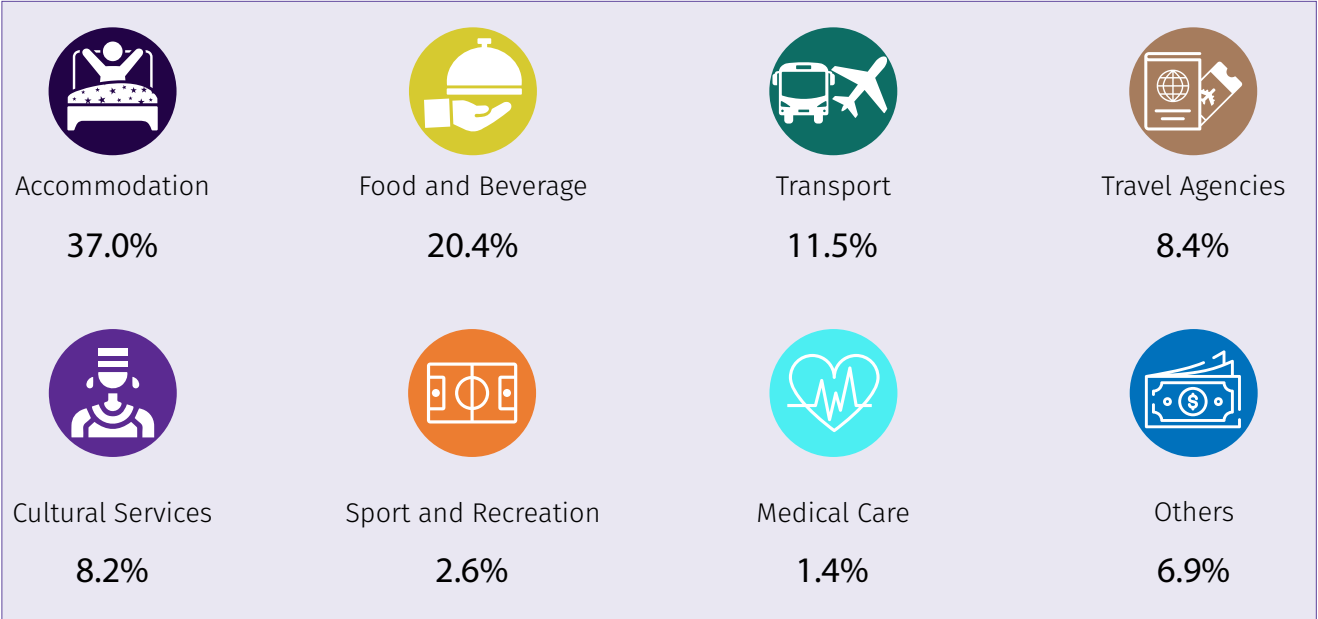
CONSUMPTION PRODUCTS (*)	2019 UGX billion	2022	2023
A.1. Tourism characteristic products			
1. Accommodation services for visitors	1,786.7	1,011.8	1,411.8
2. Food- and beverage-serving services	1,084.2	499.3	778.8
3. Air & Road passenger transport services	574.5	353.9	438.80
4. Water passenger transport services	14.5	6.2	98.6
5. Transport equipment rental services	-	40.1	38.6
6. Travel agencies and other reservation services	157.9	158.8	320.3
7. Cultural services	269.5	171.8	313.3
8. Sports and recreational services	123.6	127.0	101.2
A.2. Other consumption products (a)			
1. Health and Medical Care	-	89.5	53.2
2. Retail Trade	17.2	7.0	0.4
B1. Valuables	0.0	0.0	0.0
B2. Other	552.3	106.1	263.7
TOTAL INBOUND TOURISM EXPENDITURE	4,580.4	2,571.5	3,818.6

Source: Tourism Expenditure and Motivation Survey Report, 2023 (MTWA), Arrival and Departure Statistics (UBOS), 2023

2.6 MAIN COMPONENTS OF INBOUND TOURISM EXPENDITURE

The three main products /industries/products in Inbound Tourism Expenditure in 2023 were Accommodation (37.0 percent), Food and Beverage (20.4 percent) and Passenger transport (11.5 percent) with a combined share of 70 percent. This means 70 cents of every dollar by inbound visitors is spent on Accommodation, Food and Transport. The main products of Inbound Tourism remained consistent with those in 2019 and 2022.

Figure 4: Main Components of Inbound Tourism Expenditure, 2023



Source: Tourism Expenditure and Motivation Survey Report, 2023 (MTWA), Arrival and Departure Statistics (UBOS), 2023,

3

DOMESTIC TOURISM DEMAND

CHAPTER 3: TSA TABLE 2: DOMESTIC TOURISM IN UGANDA

Domestic tourism consists of residents traveling to and staying in places within Uganda but outside their usual environment (District) for not more than 12 consecutive months for leisure, business, or other purposes other than employment by an entity/organization in place visited.

3.1 INTRODUCTION

In Uganda, Domestic tourism comprises the activities of a resident visitor in Uganda either as part of a domestic trip or part of an outbound trip (IRTS 2008). TSA Table 2 focuses on domestic tourism expenditure by-products, classes of visitors, and types of trips.

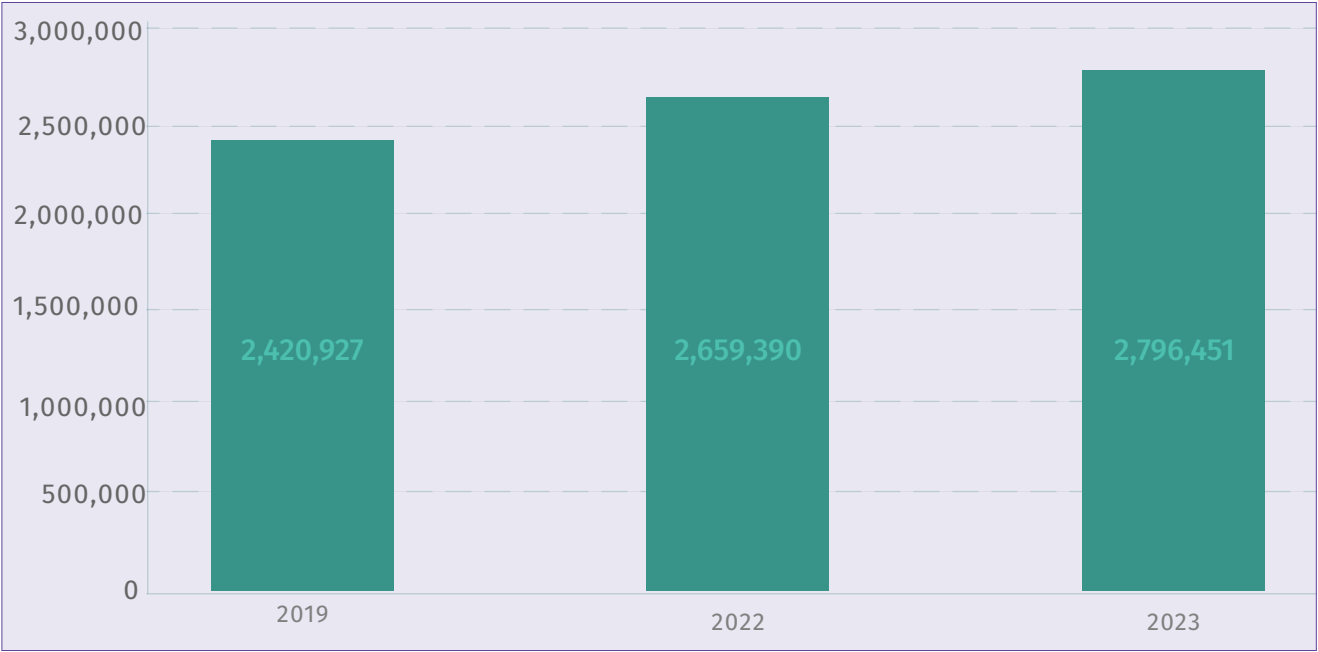
This TSA Table 2 is also an input into TSA Table 4 that combines internal tourism expenditure, made up of in-bound tourism expenditure from TSA Table 1 and domestic tourism expenditure from TSA Table 2.

The Uganda National Household Survey (UNHS) 2023/24 was used to compile the Data on Domestic Tourism in 2023. This survey is carried out once every three years. To complete TSA Table 2, domestic tourism expenditure was not limited to only the expenditure of visitors on domestic trips, but also the expenditure within the country for visitors that undertake outbound trips.

3.2 DOMESTIC VISITORS, 2023

Uganda's domestic tourism has steadily grown, with visitor numbers rising from 2.66 million in 2022 to 2.80 million (2023)—a 5.2% increase. This growth reflects enhanced government tourism initiatives towards domestic tourism, and a rising preference for local travel.

Figure 5: Number of Domestic visitors by Year, 2019-2023



Source: Uganda National Household Survey (UNHS), 2023/2024

3.2.1. Visitors by Main Purpose of Travel (2019-2023)

In 2023, visiting friends and relatives (VFR) remained the leading reason for domestic travel, accounting for 55.3% of all visits, a sharp increase from 33.3% in 2022. Leisure and holiday travel followed at 13.8%, while business and professional travel saw a slight rise to 9.4%. Notably, spiritual and religious visits dropped significantly from 24.1% in 2022 to 7.8% in 2023. Meanwhile, meetings, conferences, and medical treatment-related travel increased, reflecting a shift in travel priorities.

Table 3: Purpose of Visit of Domestic Visitors, 2019-2023

Main Purpose of Visit	2019	2022	2023	%Share 2022	%Share 2023
Leisure, recreation and holidays	325,928	358,032	386,530	13.5%	13.8%
Business and professional	221,900	243,757	264,152	9.2%	9.4%
Spiritual, Religious visit / pilgrimage	583,914	641,430	217,217	24.1%	7.8%
Meetings, trainings and Conferences	39,051	42,897	115,849	1.6%	4.1%
Medical Treatment	128,575	141,239	170,729	5.3%	6.1%
Visiting friends and relatives	806,907	886,388	1,547,203	33.3%	55.3%
Other (specify)	314,652	345,646	94,771	13.0%	3.4%
Total	2,420,927	2,659,390	2,796,452	100%	100%

Source: Uganda National Household Survey (UNHS), 2023/2024

3.2.2. Domestic Trips

In 2023, 17.1 million domestic trips were recorded, down from 23.6 million in 2022, with more trips spent by overnight visitors (52%). Ugandans average six domestic trips yearly, with business travel leading (10 trips), followed by meetings (8), religious visits, and leisure (6 each).

Table 4: Number of Domestic Trips, 2019-2023

Type of Visitor	Total Trips			% Trips
	2019	2022	2023	2023
Same Day Visitors	12,882,831	14,151,793	8,210,663	48
Overnight Visitors	8,608,127	9,456,037	8,898,406	52
Total	21,490,958	23,607,830	17,109,069	100

Source: Uganda National Household Survey (UNHS), 2023/2024

3.2.3. Nights spent by domestic visitors

In 2023, domestic visitors in Uganda spent an average of 6.3 nights per trip, up from 5.8 nights in 2022. Visiting friends and relatives (7.2 nights) and business travel (6.8 nights) had the longest stays, while funerals had the shortest (2.2 nights). Daily expenditure also increased, with tourists spending UGX 82,021 per day, higher than same-day visitors (UGX 41,529). The rise in both stay duration and spending suggests a shift toward longer, higher-value domestic travel.

Table 5: Average Length of stay and Expenditures for Domestic visitors

Indicators	Units	2019	2022	2023
Average length of stay	Nights	5.1	5.8	6.3
Overall Average expenditure per day	UGX	40,239	45,323	65,954
Tourist Average expenditure per day	UGX	51,304	57,786	82,021
Same day Average expenditure per day	UGX	30,121	33,927	41,529

Source: Uganda National Household Survey (UNHS), 2023/2024

3.2.4. Domestic Tourism Expenditure, 2019-2023

In 2023, Uganda's domestic tourism expenditure grew by 38.5%, reaching UGX 5.09 trillion, up from UGX 3.68 trillion in 2022. The highest spending was on passenger transport (UGX 2.89 trillion, +23.6%) and food & beverages (UGX 995.8 billion, +40.3%), while accommodation saw the largest growth (+254.5%). However, cultural services declined by 55.6%, indicating shifting spending patterns. The overall rise reflects increased domestic travel activity and higher spending per trip.

Table 6: Domestic Tourism Expenditure by Products, In Uganda Shillings, 2019-2023

CONSUMPTION PRODUCTS (*)	2019	2022	2023	%Change
A.1. Tourism characteristic products				
1. Accommodation services for visitors	223.79	220.11	780.3	254.5%
2. Food- and beverage-serving services	583.76	709.86	995.8	40.3%
3. Air & Road passenger transport services	1,837.08	2,335.26	2,886.9	23.6%
4. Transport equipment rental services	42.47	63.45	64.1	1.0%
5. Travel agencies and other reservation services	1.55	3.83	15.1	294.3%
6. Cultural services	40.17	50.95	22.6	-55.6%
7. Sports and recreational services	22.66	26.51	64.9	144.8%
A.2. Other consumption products (a)				
1. Others	214.39	265.27	261.0	-1.6%
B.1. Valuables				
B2. Other				
TOTAL DOMESTIC TOURISM EXPENDITURE	2,965.87	3,675.24	5,090.7	38.5%

Source: Uganda National Household Survey (UNHS), Uganda Bureau of Statistics

3.3 MAIN COMPONENTS OF DOMESTIC TOURISM EXPENDITURE, 2019-2023

The total domestic tourism expenditure for 2023 reached UGX 5.09 trillion, with road and air passenger transport contributing the largest share (56.7%), though lower than 63.5% in 2022. Food and beverage services (19.6%) remained stable, while accommodation spending significantly increased to 15.3% from 6.0% in 2022, indicating a rise in overnight stays. Other expenditures, including cultural services (0.4%) and transport rental (1.3%), remained minimal, while sports and recreation spending doubled to 1.3%. The shift suggests higher spending on accommodation and leisure activities.

Table 7: Contribution of Each Industry to Total Domestic Tourism Expenditure, 2022-2023

CONSUMPTION PRODUCTS (*)	2019	2022	2023
A.1. Tourism characteristic products			
1. Accommodation services for visitors	7.5%	6.0%	15.3%
2. Food- and beverage-serving services	19.7%	19.3%	19.6%
3. Air & Road passenger transport services	61.9%	63.5%	56.7%
4. Transport equipment rental services	1.4%	1.7%	1.3%
5. Travel agencies and other reservation services	0.1%	0.1%	0.3%
6. Cultural services	1.4%	1.4%	0.4%
7. Sports and recreational services	0.8%	0.7%	1.3%
A.2. Other consumption products (a)			
1. Others	7.2%	7.2%	5.1%
B.1. Valuables			
B2. Other			
TOTAL	100%	100%	100%

Source: Uganda National Household Survey (UNHS), 2023/2024

3.4 DOMESTIC TOURISM EXPENDITURE AND HOUSEHOLD FINAL CONSUMPTION EXPENDITURE (HFCE)


In 2023, Uganda's domestic tourism expenditure grew by 38.5% to UGX 5.09 trillion, contributing 4.0% to House-hold Final Consumption Expenditure (HFCE), up from 3.1% in 2022. HFCE increased by 7.7% to UGX 128.52 trillion, indicating higher household spending. The steady growth in domestic tourism's share of HFCE reflects increasing consumer confidence and a greater allocation of household budgets toward travel and leisure.

Table 8: Domestic Tourism Expenditure and Household Final Consumption Expenditure (HFCE) (at current prices), 2019-2023

Year	Domestic Tourism Expenditure (UGX Billions)	Growth rate	Household Final Consumption Expenditure (HFCE) (UGX Billions)	Growth Rate	Share of Domestic Tourism Expenditure to HFCE (In percent)
2019	2,965.87		93,568.27		3.2%
2022	3,675.24	23.9%	119,281.02	27.5%	3.1%
2023	5,091.70	38.5%	128,520.67	7.7%	4.0%

Source: Uganda National Household Survey (UNHS), National Accounts (UBOS)





4

OUTBOUND TOURISM DEMAND

CHAPTER 4: TSA TABLE 3: OUTBOUND TOURISM

4.1 INTRODUCTION

In Uganda, Outbound tourism is defined as the tourism activity of Uganda’s residents outside its economic territory. It includes all activities of Ugandan residents travelling to and staying in places outside Uganda for not more than twelve consecutive months.

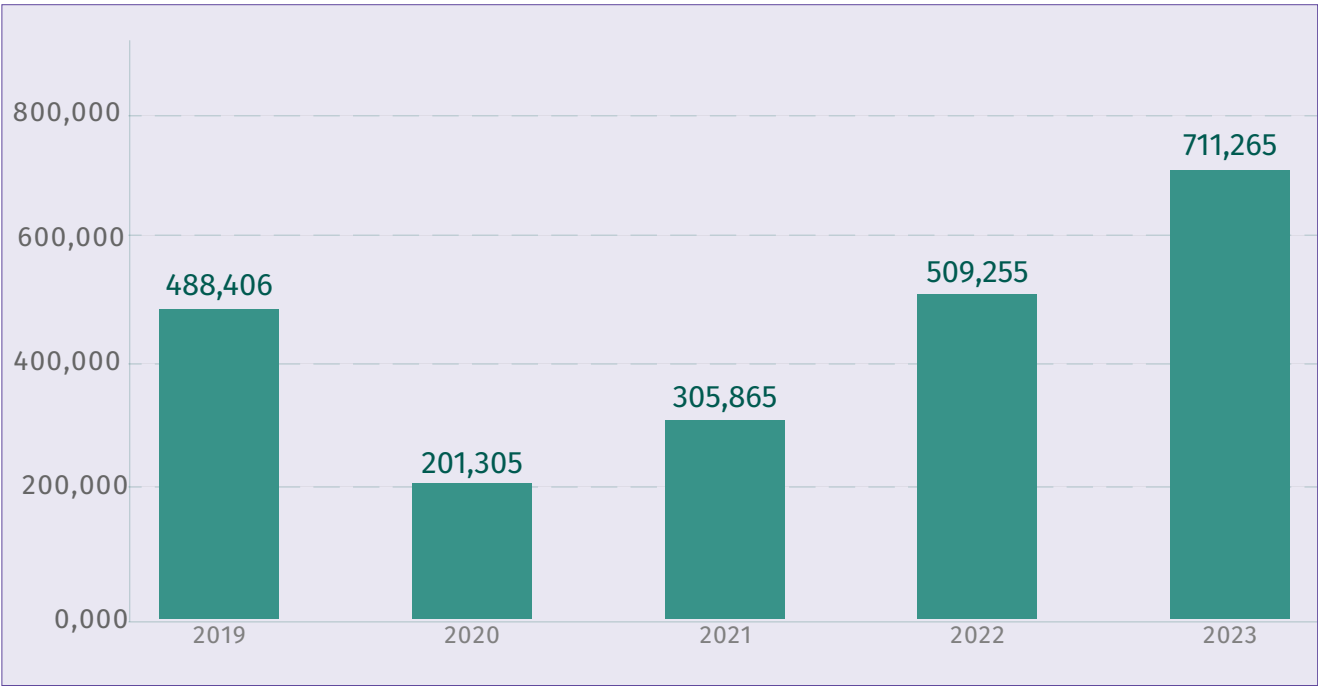
While inbound tourism includes visits within the country of reference, outbound tourism refers to trips of resident visitors outside the economy of reference, either as part of a domestic trip or as part of an outbound tourism trip.

In the definition of a round trip, an outbound trip involves travel from the time of departure from one’s place of residence until they return to that same place, in which their main destination was out of the country. It is important to note therefore that not all expenditure may happen outside the economic territory. Data on international outbound tourism was obtained and derived from Bank of Uganda Quarterly Outbound Survey, 2022.

4.2 OUTBOUND VISITORS, 2019-2023

The number of Ugandan residents traveling abroad on a foreign travel increased by 39.6 percent, from 509,255 in 2022 to 711,265 in 2023, surpassing pre-pandemic levels recorded in 2019 (488,406 travelers). This recovery is driven by eased travel restrictions, economic recovery, and renewed interest in international travel.

Figure 6: Ugandan Residents on a Foreign Trip, 2019-2022

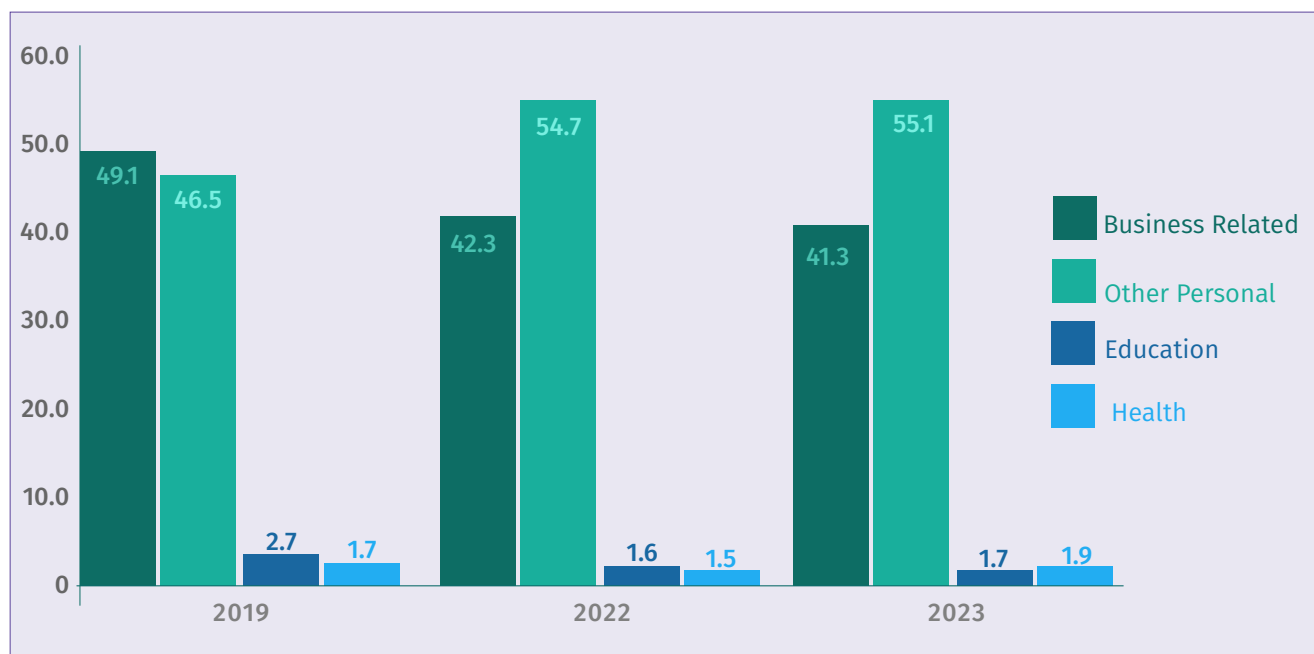


Source: Bank of Uganda Quarterly Outbound Survey, 2023, Arrival and Departure Statistics (UBOS).

4.3 MAIN PURPOSE OF VISIT FOR OUTBOUND VISITORS

In 2023, Ugandan Residents majorly went for a Foreign Travel for personal visits including Holiday visits (55.1 percent) and Business (41.3 percent). A significant number left the country for Education and Medical treatment (3.6%) as shown below.

Figure 7: Ugandan Residents' main purpose for Travel abroad, 2019-2023



Source: Bank of Uganda Quarterly Outbound Survey, 2023, Arrival and Departure Statistics (UBOS).

4.4 OUTBOUND TOURISM EXPENDITURE (TOURISM IMPORTS)

Outbound tourism refers to tourism of Ugandan residents during overseas travel or outside the economic territory of Uganda, while outbound tourism expenditure refers to spending by Ugandan residents while travelling outside Uganda.

Ugandan Residents spent UGX 1,059.7 billion on Foreign Travel in 2023, compared to UGX 899.0 billion in 2022. This represents a 17.9 percent increase in spending by Ugandan residents on foreign travel.

Table 9: Outbound Tourism Expenditure by Product at Current Prices in billions, Uganda, 2019-2023

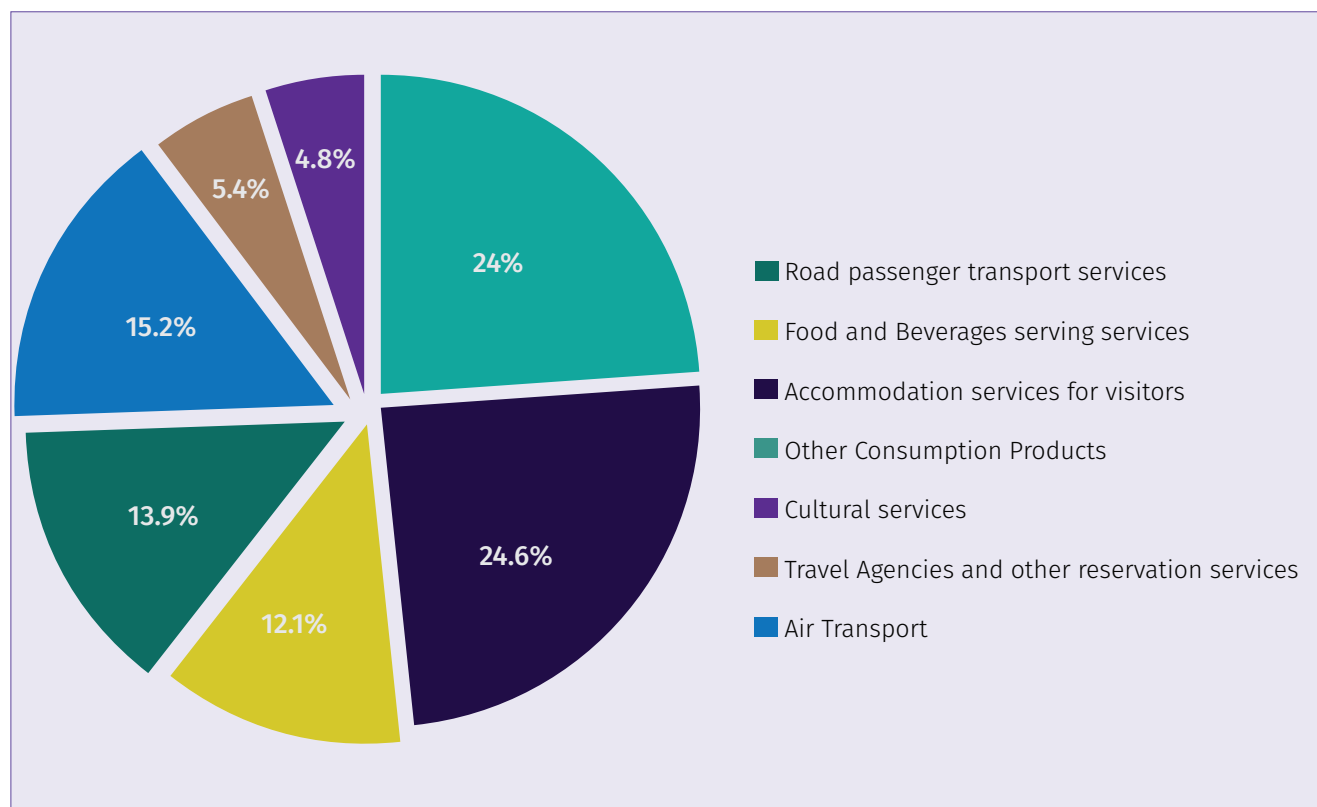
CONSUMPTION PRODUCTS (*)	2019	2022	2023
A.1. Tourism characteristic products			
2. Accommodation services for visitors	605.8	220.9	260.4
3. Food- and beverage-serving services	217.9	108.7	128.2
4. Road passenger transport services	125.3	124.8	147.1
5. Air passenger transport services	0.0	136.7	161.2
6. Travel agencies and other reservation services	0.0	48.5	57.2
7. Cultural services	0.0	43.5	51.3
A.2. Other consumption products (a)	0.0	25.1	29.5
B.1. Valuables	717.3	190.8	224.9
TOTAL OUTBOUND TOURISM EXPENDITURE	1,666.3	899.0	1,059.7

Source: Bank of Uganda Quarterly Outbound Survey, 2023, Arrival and Departure Statistics (UBOS).

4.5 MAIN COMPONENTS OF OUTBOUND TOURISM EXPENDITURE

The three main products in Outbound Tourism Expenditure in 2023 were Accommodation (24.6%), Other expenses (24.0%) and Air passenger transport (15.2%) with a combined share of 63.8 percent.

Figure 8: Main Components of Outbound Tourism Expenditure, 2023



Source: Bank of Uganda Quarterly Outbound Survey, 2023, Arrival and Departure Statistics (UBOS).

A hippopotamus is shown from the chest up, partially submerged in water. Its head is facing forward, and its ears are visible. The water is calm, and the background is slightly blurred, showing some distant lights. A large, purple, stylized number '5' is overlaid on the right side of the image, partially covering the hippo's ear and the background.

5

INTERNAL TOURISM CONSUMPTION

CHAPTER 5: TSA TABLE 4: INTERNAL TOURISM CONSUMPTION

5.1 INTRODUCTION

Internal Tourism Consumption consists of tourism expenditure plus imputed consumption by domestic, inbound, and outbound visitors on tourism related products, including those sold at prices that are not economically significant.

TSA Table 4 presents other components of tourism consumption in addition to tourism expenditure given in Tables 1 to 2.

These components include:

- i) **Services associated with vacation accommodation on own account.** This item includes all imputed accommodation services related to accommodation units on own account and to all other types of vacation home ownership, as well as expenditure related to their acquisition that is not capitalized as part of the investment, for instance, charges for time-share exchanges.
- ii) **Tourism social transfers in kind (except refunds).** This item includes the value of individual non-market services provided by governments and non-profit institutions serving households (NPISH) that benefit visitors and exceed the values paid by the visitors themselves: costs of museums, performing arts, short-term education, health services provided short term in special establishments, etc.
- iii) **Other imputed consumption.** This item includes all other imputed items not previously included, such as services benefiting visitors for which they do not pay (costs of vacation residences or camps provided by producers for the benefit of their employees, financial intermediation services indirectly measured (FISIM) on purchases related to tourism trips, etc.). However, these “other” components are not captured in the current study (Column 4.2).

5.2 INTERNAL TOURISM EXPENDITURE

Internal tourism refers to the combined inbound tourism and domestic tourism. In 2023, internal tourism expenditure of Uganda reached UGX. 8,909.4 billion, which was 43 percent greater than the UGX 6,246.8 billion in 2022 and even higher than the UGX 7,546.3 billion in 2019. This marked increase is mainly due to the rise of domestic tourism expenditure, which went from UGX. 3,675.24 billion in 2022 to UGX. 5,090.7 billion in 2023.

Table 10: Internal Tourism Expenditure by Product at Current Prices, Uganda, 2019-2023

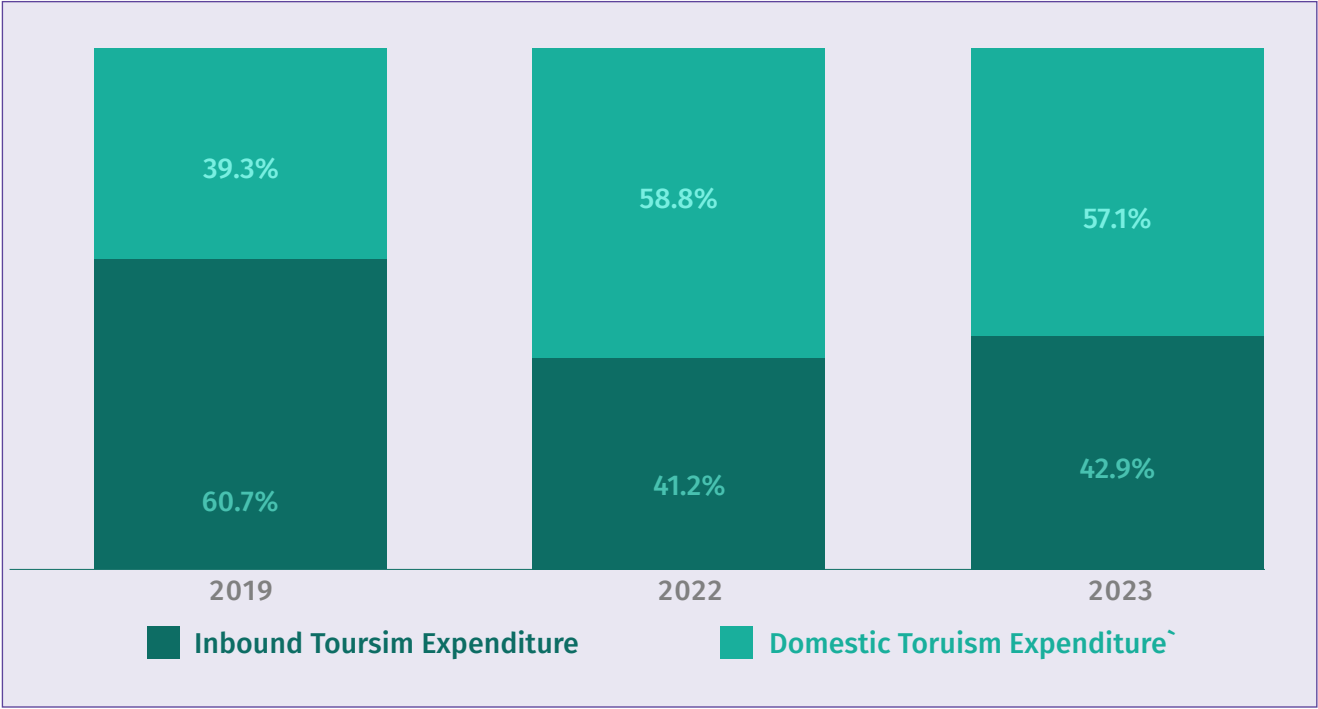
CONSUMPTION PRODUCTS (*)	2019 UGX Billions	2022 UGX Billions	2023 UGX Billions
A.1. Tourism characteristic products			
1. Accommodation services	2,010.5	1,231.9	2,192.1
2. Food- and beverage-serving services	1,667.9	1,209.2	1,774.6
3. Road passenger transport services	2,411.5	2,689.1	3,305.5
4. Water passenger transport services	14.5	6.2	118.8
5. Transport equipment rental services	42.5	103.6	102.8
6. Travel agencies and other reservation services	159.5	162.6	335.4
7. Cultural services	309.6	222.8	335.9
8. Sports and recreational services	146.3	153.5	166.1
9. Others	-	-	578.3
A.2. Other consumption products (a)			
1. Retail Trade	17.2	7.0	
2. Others	766.7	460.9	
B.1. Valuables			
TOTAL INTERNAL TOURISM EXPENDITURE	7,546.3	6,246.8	8,909.4

Source: Tourism Expenditure and Motivation Survey Report, 2023 (MTWA), Arrival and Departure Statistics (UBOS), 2023, BOU Outbound Travel Survey 2023 and the Uganda National Household Survey (UBOS)

Expenditures from domestic tourism accounted for 57.1 percent of the total internal tourism spending dominating internal tourism expenditure in 2023 and hence showing the role domestic Tourism contributed to Tourism Performance as the main driver in 2023. On the other hand, Expenditures from international tourists accounted for 42.9 percent of the total internal tourism spending in 2023.

Comparatively, Inbound tourism expenditure accounted for 41.2 percent in 2022 while Domestic tourism expenditure accounted for 58.8 percent.

Figure 9: Contribution of Inbound and Domestic Tourism to Tourism Performance

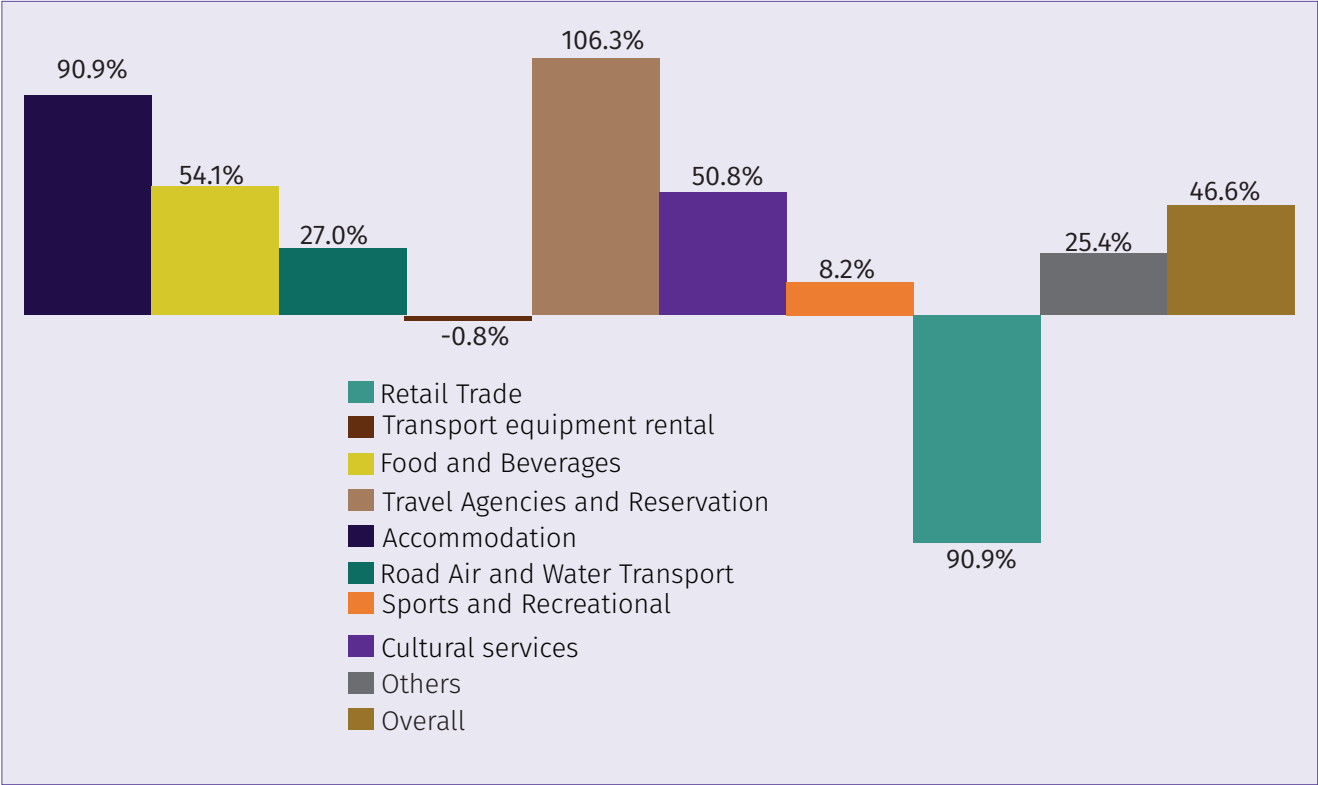


Source: Tourism Expenditure and Motivation Survey Report, 2023 (MTWA), Arrival and Departure Statistics (UBOS), 2023, BOU Outbound Travel Survey 2023 and the Uganda National Household Survey (UBOS)

Travel agencies and other reservation (106.3 percent) registered the fastest growth in 2023 from UGX. 162.6 billion in 2022 to UGX. 335.4 billion. This was followed by Accommodation for visitors which increased from UGX. 1,231.9 billion in 2022 to UGX. 2,192.9 billion in 2023, a 77.9 percent increase.

On the other hand, expenditures on Retail trade (-94.3 percent) and Transport Equipment Rental (-0.8 percent) registered a decline in internal tourism consumption in 2023 compared with 2022.

Figure 10: Internal Tourism Expenditure by Product Growth Rates (in Percent), 2022-2023



Source: Tourism Expenditure and Motivation Survey Report, 2023 (MTWA), Arrival and Departure Statistics (UBOS), 2023, BOU Outbound Travel Survey 2023 and the Uganda National Household Survey (UBOS)

5.3 INTERNAL TOURISM CONSUMPTION

In the TSA: RMF 2008, internal tourism consumption is defined as the central aggregate to describe the size of direct visitor acquisition within a country of reference. Combining the inbound and the domestic tourism expenditure plus the other components of tourism consumption brings us the fourth TSA table, which records the internal tourism expenditure by expenditure item. This key aggregate will be the basis for estimating the Tourism Direct Gross Value Added (TDGVA) and Tourism Direct Gross Domestic Product (TDGDP).

Tourism Internal consumption was UGX. 9,157.1 billion, which was 37.3 percent higher than from 2022 (UGX 6,668.2 billion). The other components of tourism consumption amounted to UGX 247.75 billion in 2023. This was a reduction of 41% from the UGX 421.4 billion of other components of tourism consumption recorded in 2022.

Table 11: Internal Tourism Consumption by Product at Current Prices, Uganda, 2019-2023

CONSUMPTION PRODUCTS (*)	2019 UGX Billions	2022 UGX Billions	2023 UGX Billions
1. Accommodation services	2,290.5	1,513.7	2,351.5
2. Food- and beverage-serving services	1,838.6	1,348.7	1,862.9
3. Air and Road passenger transport services	2,411.5	2,689.1	3,305.5
4. Water passenger transport services	14.5	6.2	118.8
5. Transport equipment rental services	42.5	103.6	102.8
6. Travel agencies and other reservation services	159.5	162.6	335.4
7. Cultural services	309.6	222.8	335.9
8. Sports and recreational services	146.3	153.5	166.1
9. Others	766.7	460.9	578.3
10. Retail trade	17.2	7.0	-
TOTAL INTERNAL TOURISM CONSUMPTION	7,996.9	6,668.2	9,157.1

5.4 COMPARISON OF INTERNAL TOURISM CONSUMPTION AND HOUSEHOLD FINAL CONSUMPTION EXPENDITURE (HFCE) AND EXPORTS

In 2023, Internal Tourism Consumption contributed 6.0 percent to Household Final Consumption Expenditure (HFCE) and Exports. This is higher than the 4.8 percent contribution in 2022 but still lower than the 6.9 percent in 2019.

Table 12: Internal Tourism Consumption and Household Final Consumption Expenditure (HFCE) and Exports (at current prices), 2019-2023

Year	Internal Tourism Consumption (UGX billions)	Growth Rate	HFCE and Exports (UGX billions)	Growth Rate	Share of Internal Tourism Expenditure to HFCE & Exports (In percent)
2019	7,997		116,428		6.9%
2022	6,668	-16.6%	138,974	19.4%	4.8%
2023	9,157	37.3%	152,760	9.9%	6.0%

Source: Derived Indicators

5.5 KEY INDICATORS IN INTERNAL TOURISM CONSUMPTION

Internal tourism expenditure and internal tourism consumption characterize globally the acquisitions by visitors within the economy of reference, tourism expenditure being the most immediately measurable one, while tourism consumption is the most inclusive one.

Table 13: Key Indicators in Internal Tourism Consumption¹

	Billion UGX			2022-2023 %Change
	2019	2022	2023	
Internal tourism expenditure	7,546.30	6,246.80	9,157.14	42.6%
Of which: Inbound tourism expenditure	4,580.40	2,571.50	4,066.40	48.5%
Of which: Domestic tourism expenditure	2,965.90	3,675.20	5,090.74	38.5%
Other components of tourism consumption	450.6	421.4		-41.2%
Total Internal tourism consumption	7,996.90	6,668.10	9,157.14	37.3%

Source: Derived Indicators

¹ (See TSA: RMF 2008 para. 4.82-4.84).



6

TOURISM SUPPLY



CHAPTER 6: TSA TABLE 5: TOURISM SUPPLY

6.1 INTRODUCTION

TSA Table 5 captures the total production of tourism characteristic industries and their products. The data used is obtained from the published National accounts production dataset; this includes Industrial Output and intermediate consumption and then the tourism gross value added at basic prices is derived. Output is valued at basic prices and intermediate consumption is presented valued at purchasers' prices. The difference between these two values results into the gross value added (GVA) at basic prices for each industry and the economy at large.

TSA Table 5 shows the Production accounts of tourism industries, other industries, by tourism products and other consumption & non-consumption products within the economy. The GVA for each tourism industry appears as it is in the National Accounts tables and the sum of gives GVA for the tourism industry.

Therefore, tourism industries and products are highlighted and embedded in the framework suitable for tourism analysis. Industries are classified using the International Standard Industrial Classification (ISIC) for economic activities revision 4 while products are classified using the Central Product Classification (CPC) revision 2.

6.2 PRODUCTION PERFORMANCE BY PRODUCT, 2022-2023

In 2023, the total output at basic prices for tourism industries in Uganda was estimated at UGX 12,026 billion, reflecting a 12.4 percent increase from UGX 10,695 billion in 2022. This growth was primarily driven by increased production in food and beverage-serving services, air and road passenger transport services, and accommodation services for visitors. These three key sectors collectively accounted for 89.1 percent of the total tourism industries output in 2023, slightly down from 89.4 percent in 2022.

Major Contributors to Growth:

- Food and Beverage Serving Services: This category experienced the most significant growth, with output increasing from UGX 3,442 billion in 2022 to UGX 4,028 billion in 2023, a 17.0 percent increase. Its share of the total tourism output rose to 33.5 percent in 2023 from 32.2 percent in 2022.
- Accommodation Services for Visitors: Output increased from UGX 2,747 billion in 2022 to UGX 3,129 billion in 2023, representing a 13.9 percent growth. Its contribution to the total output slightly improved from 25.7 percent in 2022 to 26.0 percent in 2023.
- Air and Road Passenger Transport Services: This segment grew modestly by 5.4 percent, from UGX 3,372 billion in 2022 to UGX 3,554 billion in 2023. Despite the increase, its share of total tourism output decreased from 31.5 percent in 2022 to 29.6 percent in 2023, reflecting relatively slower growth compared to other sectors. (See Table 6.1).

Table 14: TSA Table 5- Production accounts of tourism-related products, 2019 -2023

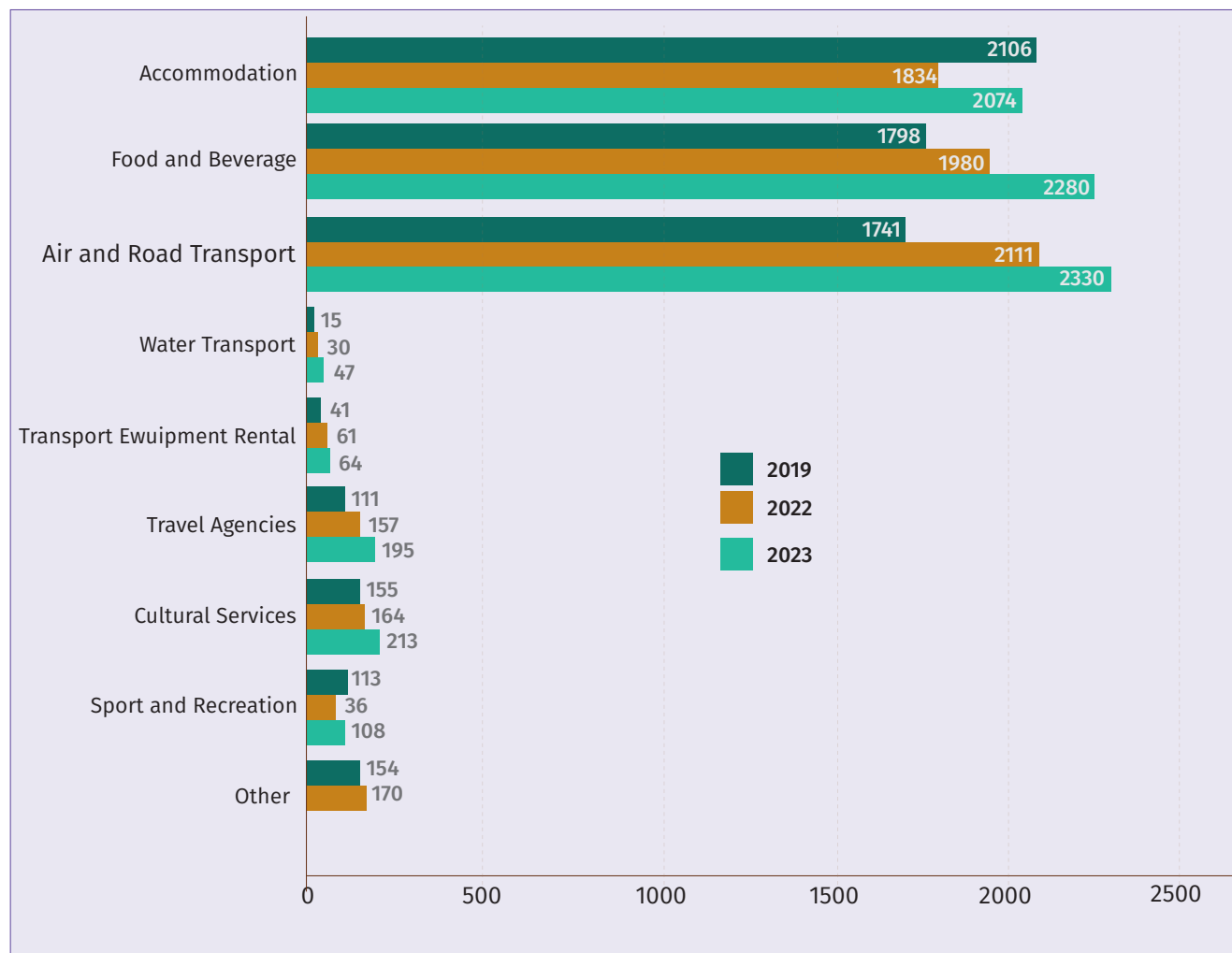
Products	Billion Shillings			Composition (%)		
	2019	2022	2023	2019	2022	2023
Accommodation services for visitors	3,090	2,747	3,129	30.9	25.7	26.0
Food- and beverage-serving services	2,993	3,442	4,028	30	32.2	33.5
Air and road passenger transport services	2,833	3,372	3,554	28.4	31.5	29.6
Water passenger transport services	25	51	79	0.2	0.5	0.7
Transport equipment rental services	73	106	106	0.7	1	0.9
Travel agencies and other reservation services	239	278	327	2.4	2.6	2.7
Cultural services	293	295	379	2.9	2.8	3.1
Sports and recreational services	238	178	212	2.4	1.7	1.8
Other consumption products (a)	206	226	212	2.1	2.1	1.8
Total output (at basic prices)	9,989	10,695	12,026	100	100	100

Source: National Accounts (UBOS)

6.3 GROSS VALUE ADDED (GVA) AT BASIC PRICES.

The Gross Value added for tourism-related industries was estimated at UGX 7,311 billion in 2023 compared to UGX 6,592 billion recorded in 2022, representing a 10.9 percent increase in value added over the period. This growth was driven by air and road passenger transport service, Food and beverage serving services and Accommodation services (See Table 6.2).

Table 15: TSA Table 5- Value Added accounts of tourism-related industries (Billion Shillings), 20219-2023



Source: National Accounts (UBOS)

In a nutshell, in 2023, there was a 12.4 percent increase in total output and 10.9 percent increase in Gross Value Added at basic Prices over a year's period compared to 2022. This means that the supply (production) side of tourism related industries had a recognizable growth.



7

RECONCILIATIONS



CHAPTER 7: TSA TABLE 6: RECONCILIATION OF DEMAND AND SUPPLY

7.1 INTRODUCTION

TSA Table 6 reconciles the demand side (internal tourism consumption, Table 4) with the supply side (production accounts of tourism industries, Table 5). This reconciliation enables the calculation of key indicators, including product-specific "tourism ratios in supply", "tourism value added", and "tourism gross domestic product". It serves as the backbone of the Tourism Satellite Account for calculating the contribution of Tourism in the following as a set of relevant indicators.

1. Internal tourism expenditure
2. Internal tourism consumption
3. Gross value added of the tourism industries (GVATI)
4. Tourism direct gross value added (TDGVA)
5. Tourism direct GDP (TDGDP)

7.2 TOURISM DIRECT GDP BY PRODUCT AT CURRENT PRICES, UGANDA 2023

In 2023, Uganda's Tourism Direct GDP reached UGX 6,061 billion, representing a 34.6% increase from UGX 4,502 billion in 2022. The sector's contribution to the economy also grew, from 2.5 percent in 2022 to 3.2 percent in 2023. Although still below pre-pandemic levels, this growth signals a positive trend towards recovery. The growth was driven by significant increases in demand for and supply of accommodation services.

Tourism Direct Gross Value Added (TDGVA) also rose to UGX 5,692 billion in 2023, up from UGX 4,498 billion in 2022, and contributed 3.2 percent to the economy, compared to 2.7 percent in 2022. The tourism contribution to tax revenue was estimated at UGX 370 billion in 2023 compared to UGX 280 billion in 2022, representing a 2.6 percent contribution to total taxes (See Table 7.1)

Table 16: Tourism direct gross value added and tourism direct gross domestic product (Billion Shillings), 2019-2023

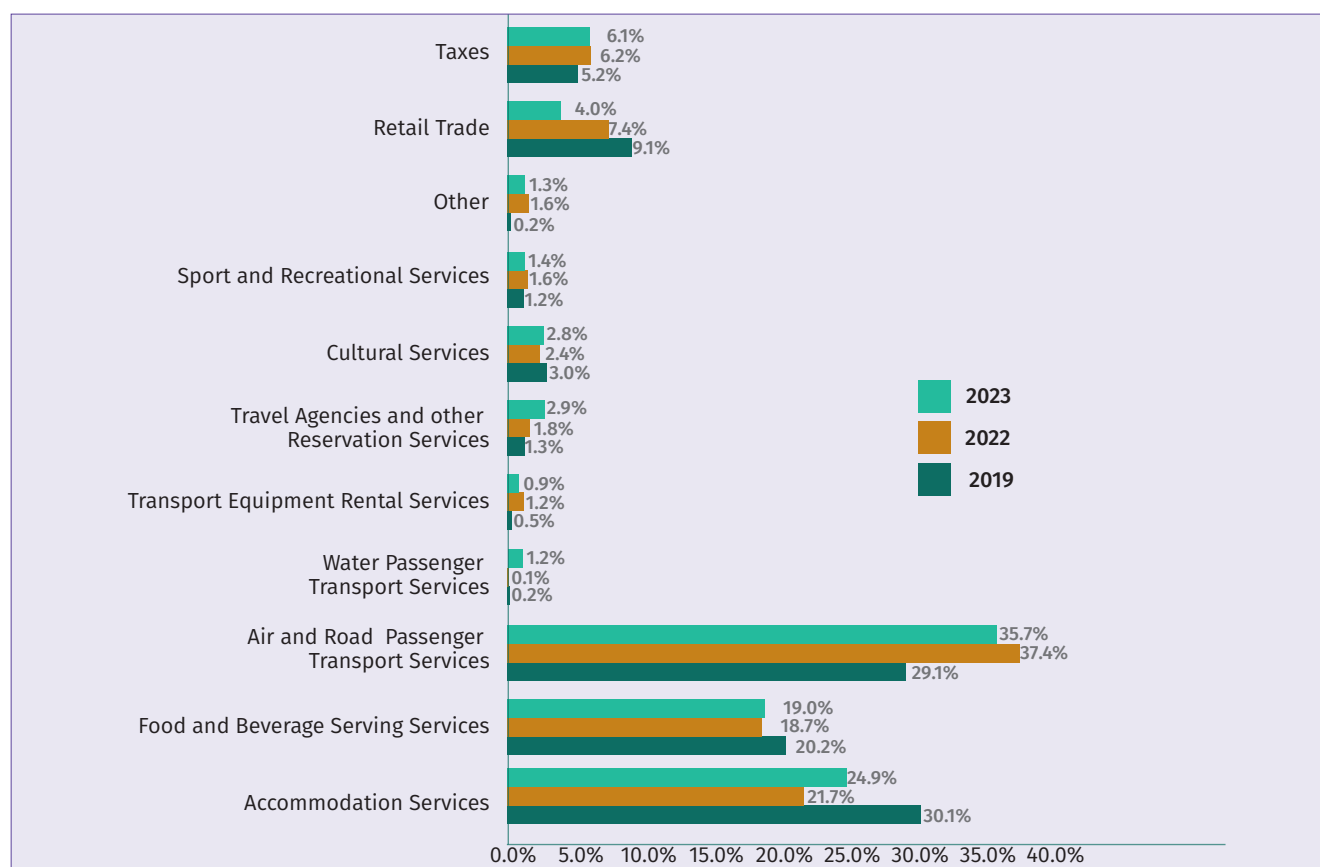
Label	Indicator	2019	2022	2023
a	Total supply of goods and services	199,623	249,636	341,387
b	Less imports of goods and services	25,477	41,310	42,587
c	Less net taxes (taxes less subsidies) on products	10,058	13,129	14,482
d	Equals total domestic supply of goods and services (output)	235,158	304,075	398,456
e	Less intermediate consumption	69,761	84,756	93,939
f	Equals Gross value added of the economy (GVA)	129,862	164,881	175,897
g	Total tourism output	7,713	6,668	9,157
h	Less total tourism intermediate consumption	2,884	2,170	3,465
i	Equals tourism direct gross value added (TDGVA)	4,829	4,498	5,692
j	Tourism share of net taxes on products	264	280	370
k	Tourism direct gross domestic product (i+j)	5,093	4,502	6,061
l	Gross Domestic Product (c+f)	139,920	178,010	190,379
m	TDGVA percentage of GVA (i/f)	3.7	2.6	3.2
n	Tourism Tax share to Total Tax Revenue (j/c)	2.6	2.1	2.6
o	Tourism Direct % Contribution to GDP (k/l)	3.6	2.5	3.2

Source: National accounts, UBOS

7.3 TOURISM DIRECT GDP COMPOSITION

The tourism sector's GDP composition in 2023 revealed a dominant role for transportation and accommodation. Air and Road passenger transport accounted for 35.7 percent of tourism direct GDP, a slight decrease from 37.4 percent in 2022. Accommodation services contributed 24.9 percent, while Food and beverage serving services added 19.0 percent. Transport equipment rental services remained a relatively minor contributor, at 0.9 percent. Overall, the sector's composition remained relatively stable, with transportation and accommodation continuing to drive tourism GDP. (See Figure 11 below).

Figure 11: Tourism product percentage contribution to TDGDP



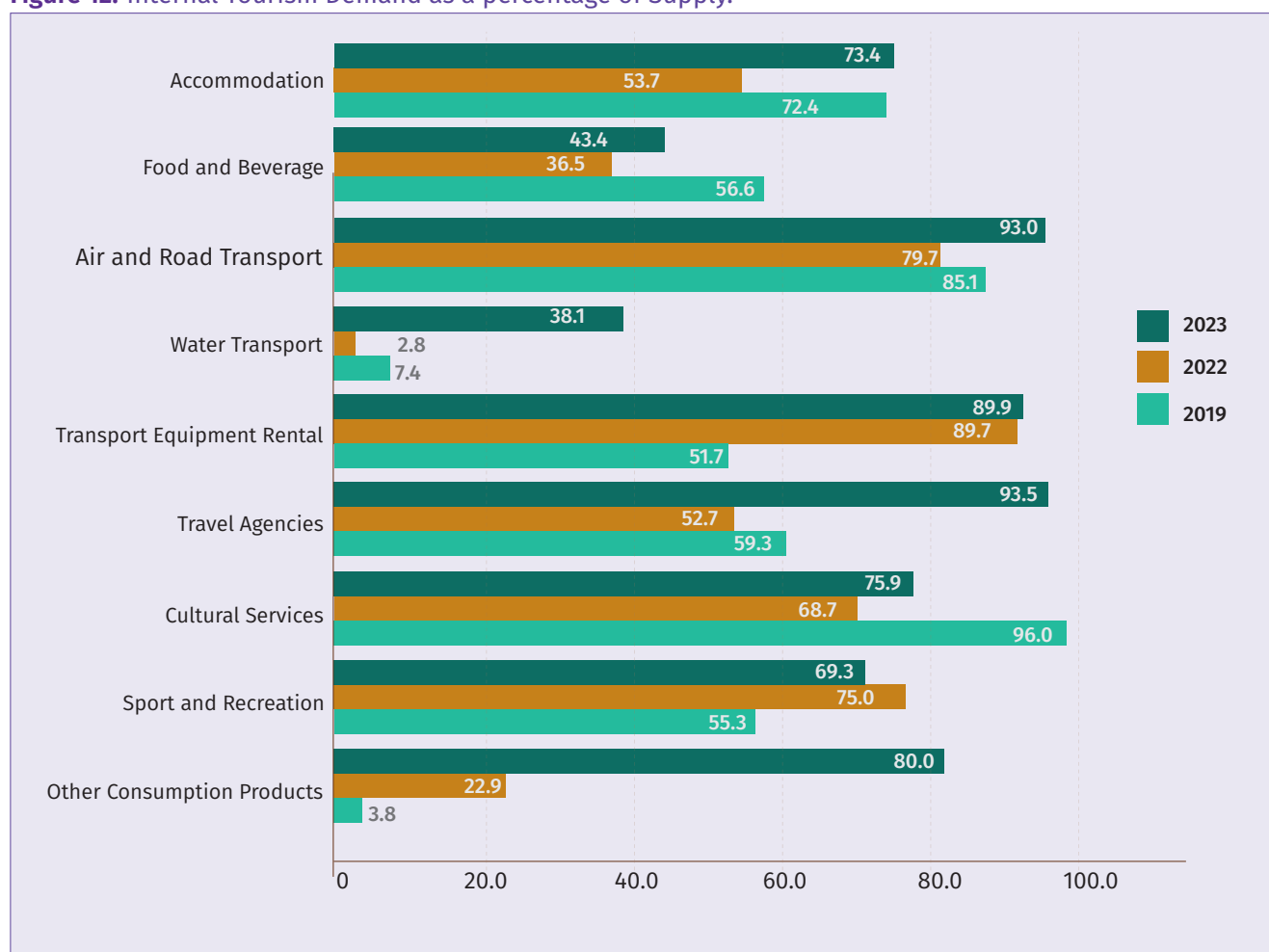
Source: National accounts, UBOS

7.4 SUPPLY VS. INTERNAL TOURISM DEMAND

The total tourism industries supply was estimated at UGX 12,026 billion in 2023 compared to UGX 10,695 billion in 2022 (**TSA Table 5**). On the other hand, Internal tourism demand (inbound and domestic expenditures) was estimated at UGX 9,157 billion in 2023 compared to UGX 6,668 billion recorded in 2022 (**TSA Table 4**) indicating that both demand and supply increased over the period.

The demand for tourism services increased from 54.8 percent of supply in 2022 to 68.9 percent in 2023. Notably, demand for water transport rose from 2.8 percent to 38.1 percent, largely due to previously unreported expenditures by domestic tourists. Demand for travel agencies and other reservation services also increased, rising to 93.5 percent in 2023 from 52.7 percent in 2022. Accommodation services demand grew to 73.4 percent in 2023, up from 53.7 percent in 2022. Rental of transport equipment services demand edged up from 89.7 percent to 89.9 percent. In contrast, demand for sports and recreational services declined by 7.5 percent to 69.3 percent in 2023. Overall, the demand for tourism services is increasing, putting pressure on supply. (see Figure 7.2).

Figure 12: Internal Tourism Demand as a percentage of Supply.



Source: Statistical Abstract 2023 and Tourism Expenditure and Motivation Survey 202

7.5 THE EXTERNAL SECTOR

Tourism service export was estimated at UGX 3,818.6 billion in 2023, up from UGX 2,572 billion recorded in 2022, contributing 69.7 percent to service exports and 15.8 percent to total exports. On the other hand, Tourism service imports were estimated at UGX 1,059.7 billion in 2023 compared to 899.0 billion recorded in 2022, contributing 8 percent to service imports and 2.5 percent to total imports.

Net tourism service export earnings were estimated at a surplus of UGX 2,759 billion in 2023 compared to UGX 1,673 billion surplus recorded in 2022. As a result, tourism improved the Goods and services balance of payments despite recording a deficit of UGX 18,035 in 2023. (*see Table 7.2*).

Table 17: TSA Table 6- The External Sector

	Imports (Billion Shillings)			Exports (Billion Shillings)			Net Exports (Billion Shillings)		
	Goods & Services	Services	Tourism	Goods & Services	Services	Tourism	Goods & Services	Services	Tourism
2019	36,282	10,908	1,666	22,860	7,690	4,580	-13,421	-3,218	2,914
2022	41,166	11,636	899.0	22,724	6,838	2,572	-18,442	-4,799	1,673
2023	52,394	13,996	1,059.68	34,360	7,872	3,818.6	-18,035	-6,123	2,759

Source: National accounts, UBOS, EBOPS, BOU



8

EMPLOYMENT IN TOURISM INDUSTRIES

CHAPTER 8: TSA TABLE 7: EMPLOYMENT IN THE TOURISM INDUSTRIES

8.1 INTRODUCTION

Employment in tourism refers to the engagement in production and provision of goods and services acquired by visitors and produced either by establishments in the tourism and hospitality industry or other industries in the economy that cannot be directly observed.

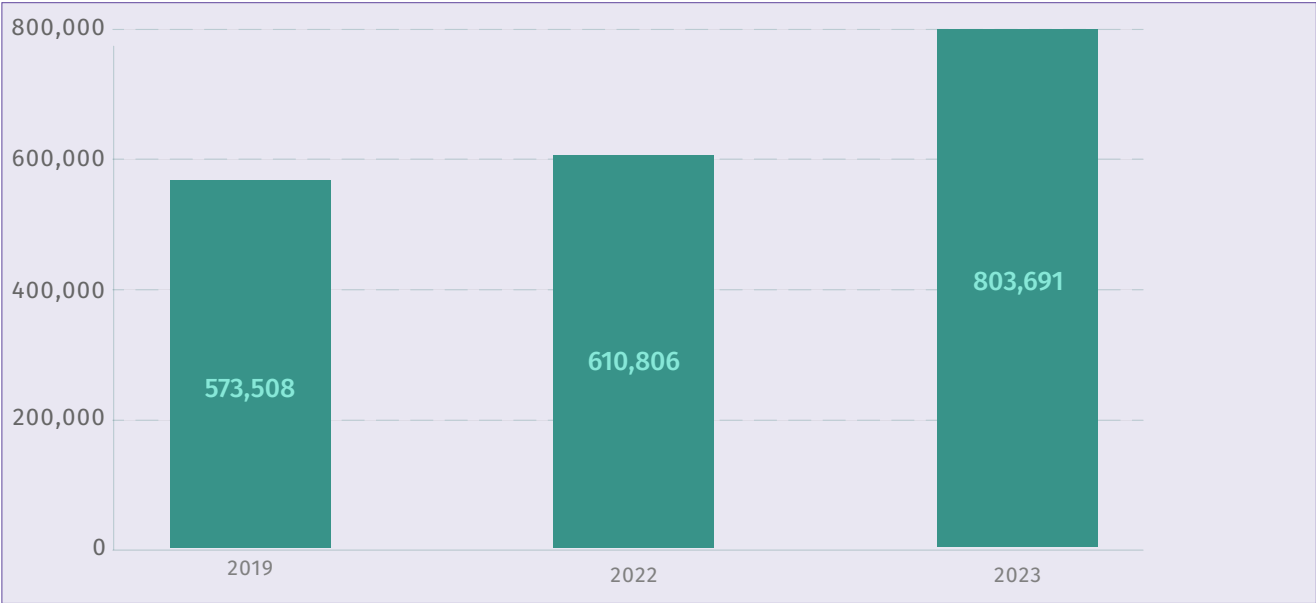
Tourism services such as accommodation, food and beverage, tour operators, tour guides and recreation are relatively labour intensive and often employ a significant number of semi-skilled persons. This is because tourism activities are sometimes located in areas with less industrial development such as national parks, mountains among others.

Besides their frequent high labour intensity, tourism activities tend to be seasonal since the flow of visitors particularly in the case of inbound tourism, is not evenly spread over the year. As such, employment in these services will fluctuate seasonally and often with a higher intensity than in other industries.

8.2 DIRECT EMPLOYMENT IN TOURISM INDUSTRIES, 2019-2023

In 2023, direct employment in tourism related industries stood at 803,691 and contributed to around 7.2 percent of total employment. Direct Employment in Tourism industry increased by 31.6 percent in 2023 from 610,806 jobs in 2022. This shows the continued growth of employment opportunities in the Tourism industry in Uganda.

Figure 13: Direct Tourism Employment in Uganda, 2019-2023

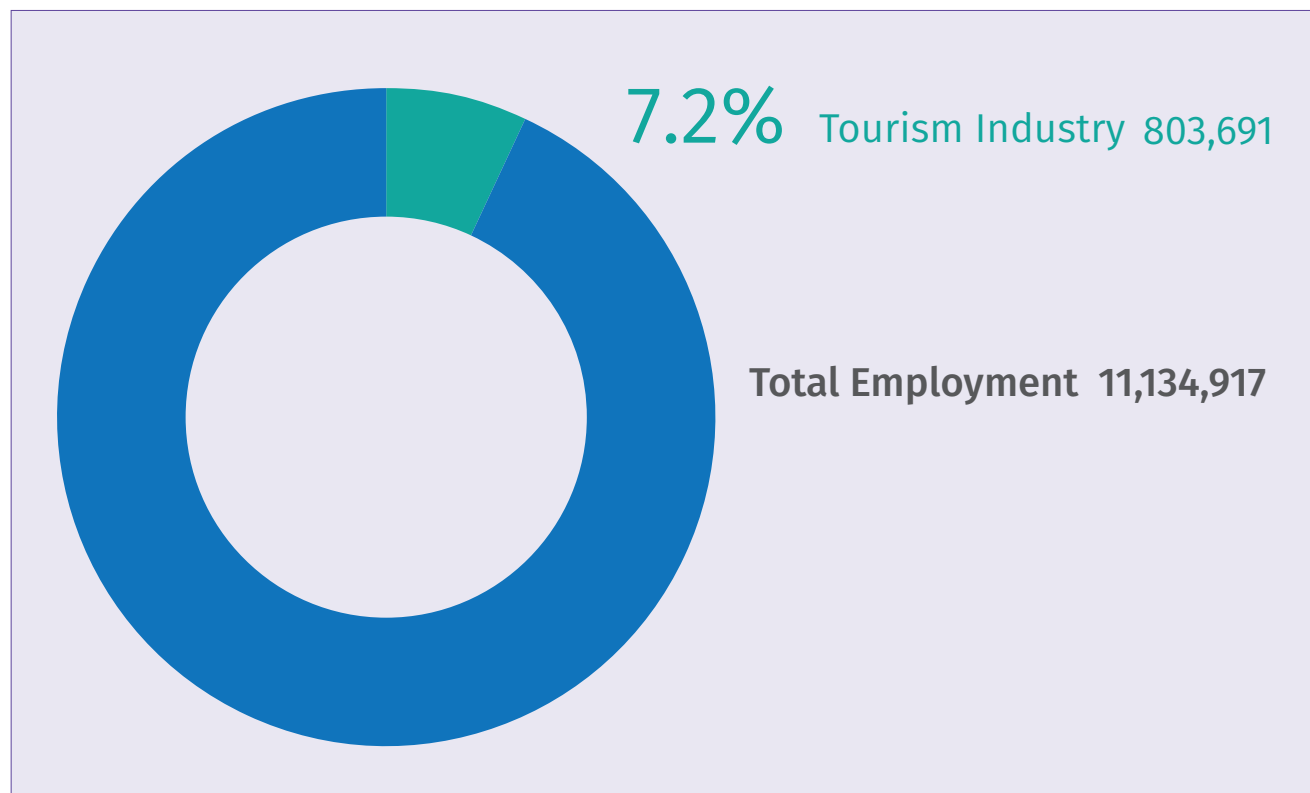


Source: UNHS 2023/24

8.3 EMPLOYMENT OF TOURISM INDUSTRIES VIS-A-VIS TOTAL EMPLOYMENT

The total employment in the country in 2023 was 11,134,917 with direct employment in Tourism industries contributing 7.2 percent of this total employment. This share was higher than the 5.7 percent and 6.6 percent shares in 2022 and 2019 respectively. This is attributed to non-tourism industries that led to the total employment growing by 3.9 percent (from 10,712,878 in 2022), slower than the 31.6 percent tourism employment growth rate.

Figure 14: Employment of Tourism Industries Vis-a-vis Total Employment, 2023



Source: UNHS 2023/24

8.4 THE TOP CONTRIBUTORS TO EMPLOYMENT IN TOURISM

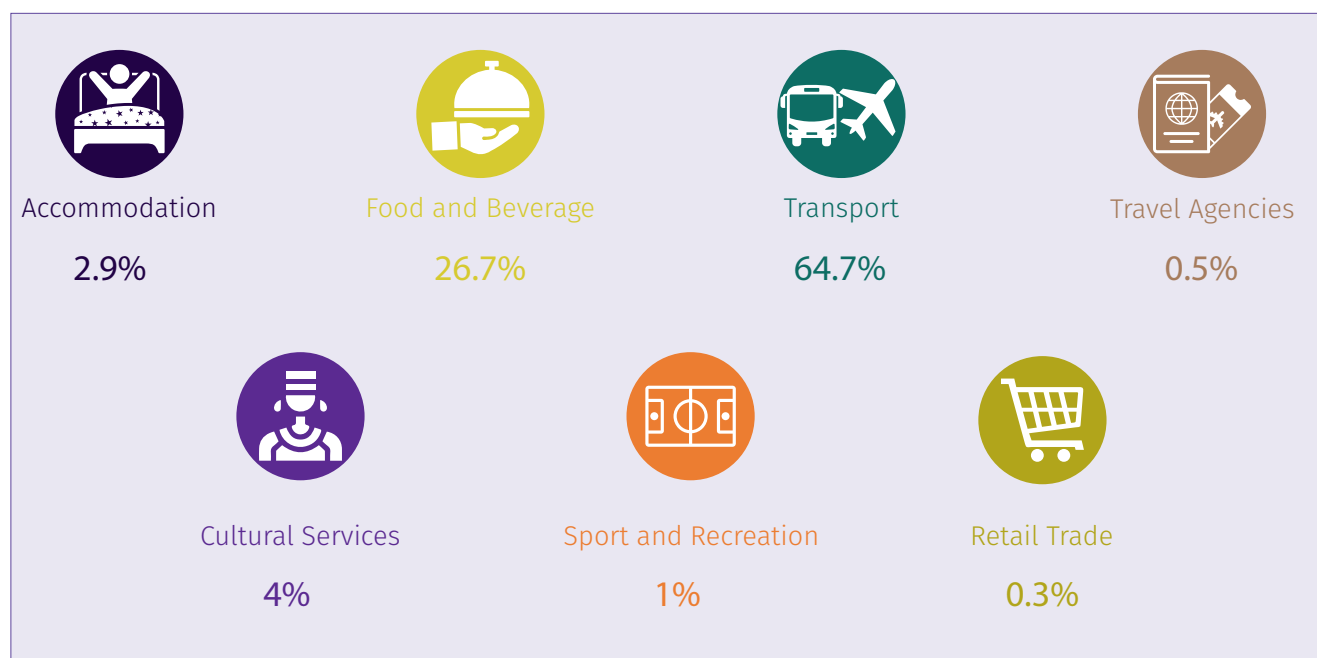
Data shows that 6 in every 10 workers in the Tourism Industry in 2023 were employed in passenger Transport and 2 in every 10 were employed in a Restaurant/beverage serving service.

The top contributors to Employment in 2023 in Tourism were passenger transport and Food and beverage serving services with a combined share of 91.3 percent. The food services industry consists of cafes, restaurants and takeaways and clubs, pubs, and bars.

The leading employers were.

- Road, Air, rail, and Water Passenger Transport - 520,092 workers
- Food and beverage Serving Activities- 214,558 workers.
- Accommodation - 23,251 workers
- Cultural Industry - 31,620 workers
- Travel agencies and other reservation industry - 3,747 workers
- Retail trade and Other Tourism Industries - 2,530 workers

Figure 15: Employment in Tourism Industries, Percent distribution: 2023



Source: UNHS 2023/24

8.5 EMPLOYMENT IN TOURISM CHARACTERISTICS INDUSTRIES

Except for Travel agencies and other reservation industry, all industries recorded growth in 2023. The number of people employed in this industry declined by 15.5 percent from 4,436 in 2022 to 3,747 in 2023. Among the other industries, jobs in the Food and beverage serving industries had the greatest increase of 61.1 percent, followed by Passenger transport (22.7 percent)

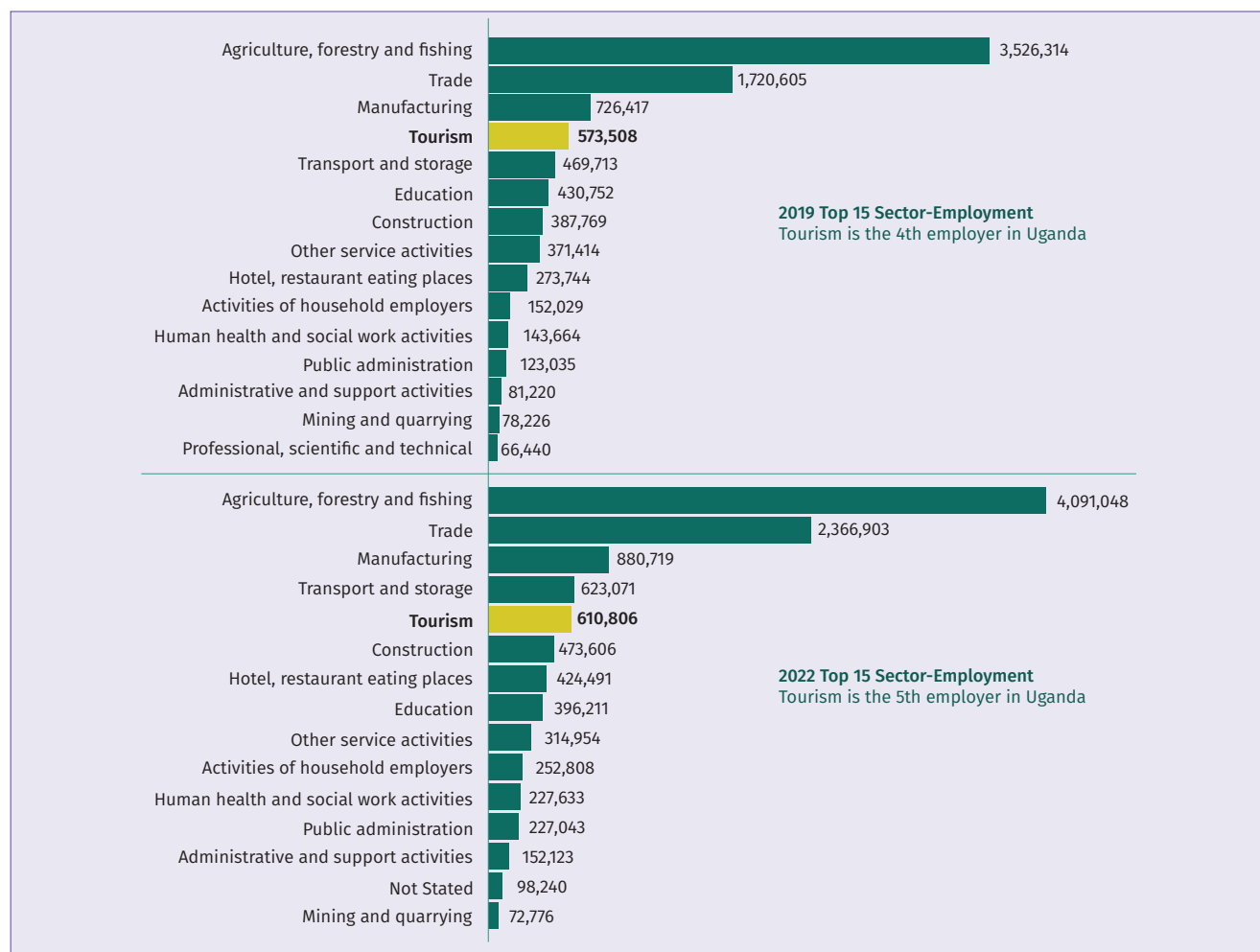
Table 18: Total Employment and Employment in Tourism Industries, Uganda: 2019-2023 (in thousand persons)

TOURISM CHARACTERISTICS INDUSTRY	2019	2022	2023	2022-2023 %Change
Accommodation industry	8,425	21,474	23,251	8.3%
Food and beverage	189,874	133,194	214,558	61.1%
Passenger transport	351,812	419,400	520,092	24.0%
Travel agencies	2,374	4,436	3,747	-15.5%
Others (Retail trade, sports and recreation, cultural,etc.)	21,023	32,302	42,043	30.2%
TOTAL TOURISM CHARACTERISTIC INDUSTRIES	573,508	610,806	803,691	31.6%

Source: UNHS 2023/24

8.6 TOP SECTORS IN EMPLOYMENT IN TOURISM CHARACTERISTICS INDUSTRIES

Figure 16: Top 15 Employers in Uganda

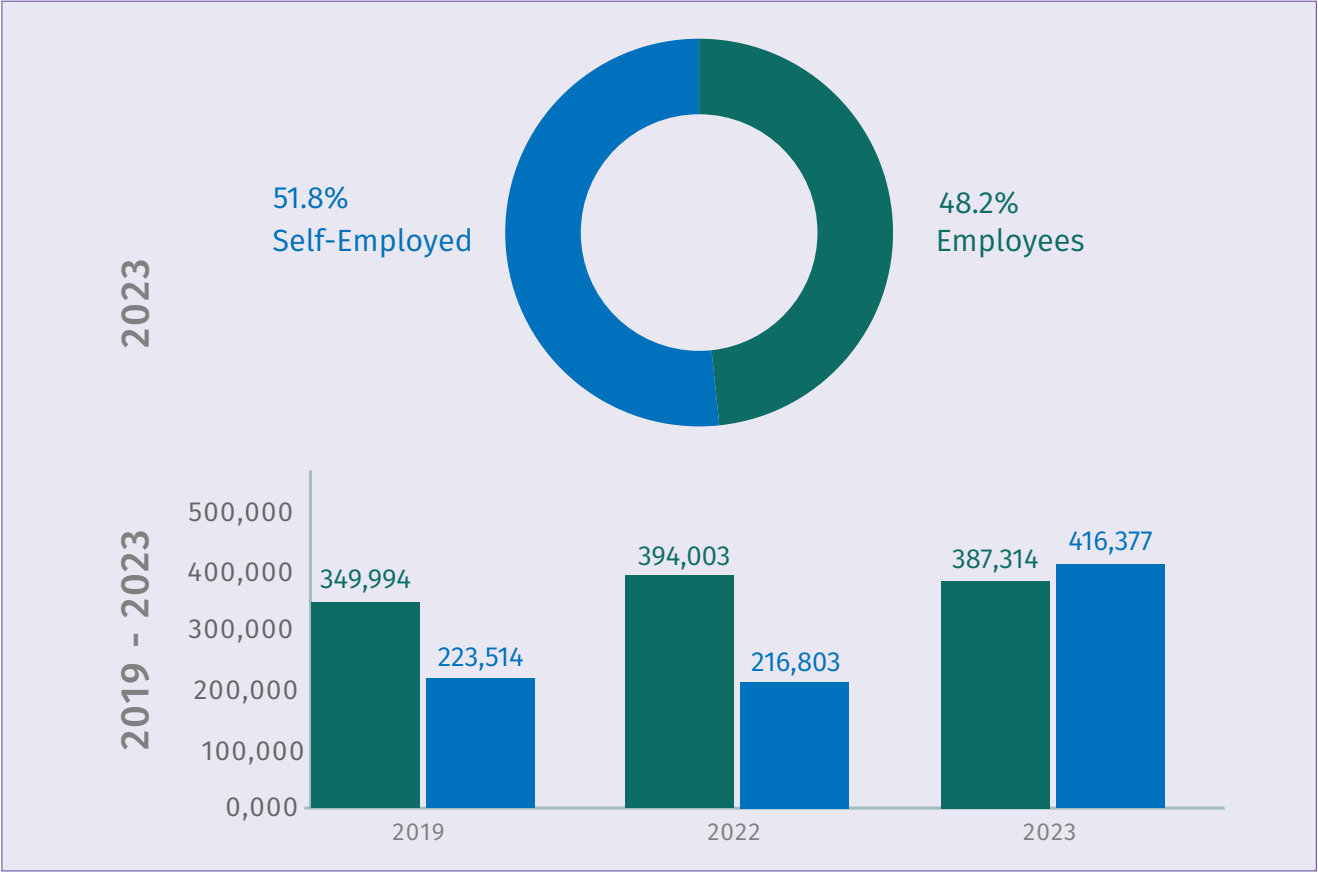


Source: National Labour Force Survey, 2021

8.7 STATUS OF EMPLOYMENT IN THE TOURISM INDUSTRY

Tourism is an industry with higher self-employed workers. In 2023, tourism provided employment to 416,377 self-employed workers and 381,768 employees, meaning that 52.2 percent were self-employed. This is a slight reduction in the proportion of self-employed workers in the Tourism industry from 2022 where self-employed workers accounted for 64.5 percent of the workforce in the tourism industry.

Figure 17: Persons directly employed in tourism industries by status in employment, 2023.

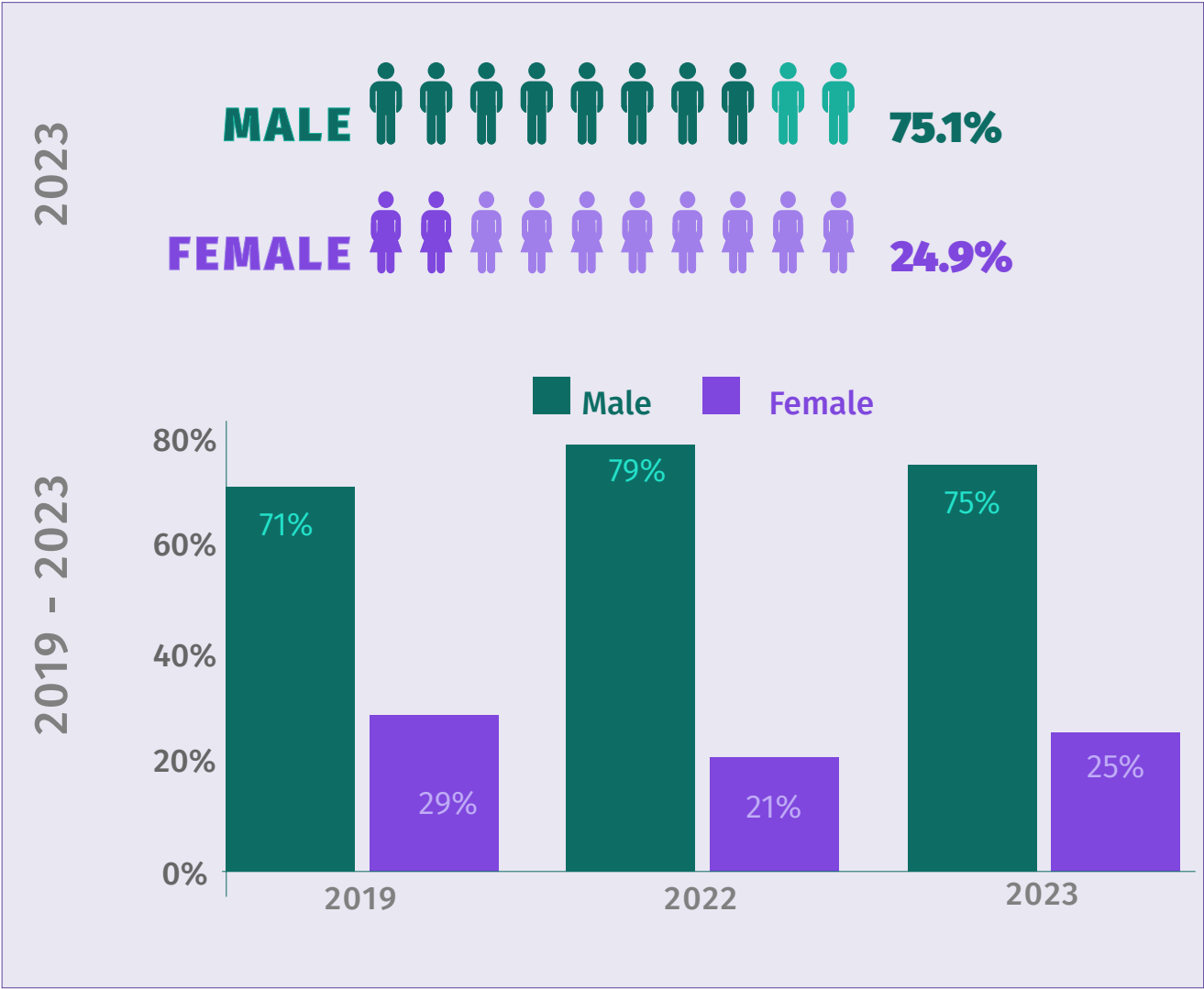


Source: UNHS 2023/24

8.8 SEX OF WORKERS IN THE TOURISM INDUSTRY

In 2023, Tourism was a male dominated industry, with 75.1 percent (599,048) of the workers being male, while only 24.9 percent (199,097 workers) were female. This is in line with 2022, where 79 percent of workers were male and only 21 percent were female; and 2019 where 71 percent were male, while 29 percent were female.

Figure 18: Sex of workers in the Tourism Industry 2023



Source: UNHS 2023/24





9

GROSS FIXED CAPITAL FORMATION

CHAPTER 9: TSA TABLE 8: GROSS FIXED CAPITAL FORMATION

9.1 INTRODUCTION

The System of National Accounts 2008 defines gross fixed capital formation as the total value of a producer's acquisitions, less disposals, of fixed assets during the accounting period plus certain additions to the value of non-produced assets realized by the productive activity of institutional units. Fixed assets are tangible or intangible assets produced as outputs from processes of production that are themselves used repeatedly or continuously in other processes of production for more than one year. It represents the capital investments in infrastructures such as hotels, resorts, restaurants and transportation systems and is essential for tourism development as it enables creation of new tourism products and services. The analysis of stocks and flows of physical investment is particularly important for tourism because, in most circumstances, tourism is not possible on a relevant scale if there is a lack of basic infrastructure for transportation, accommodation, recreation, health services and other facilities that determine, to a large extent, the nature and intensity of visitor flows.

9.2 TOURISM GROSS FIXED CAPITAL FORMATION

Tourism Gross Fixed Capital Formation (GFCF) refers to investment on produced fixed assets which are used exclusively or almost exclusively in the production of tourism characteristic goods and services.

Tourism Gross Fixed Capital Formation in Uganda was estimated at UGX 7,458 billion in 2023, a 0.6 percent decline from UGX 7,505 billion in 2022. Tourism's contribution to total investment has steadily decreased since 2019, from 19.0 percent to 18.3 percent in 2022, and further to 17.2 percent in 2023. This decline is attributed to faster growth in investments in other sectors compared to the tourism industry. See Table 9.1 for details.

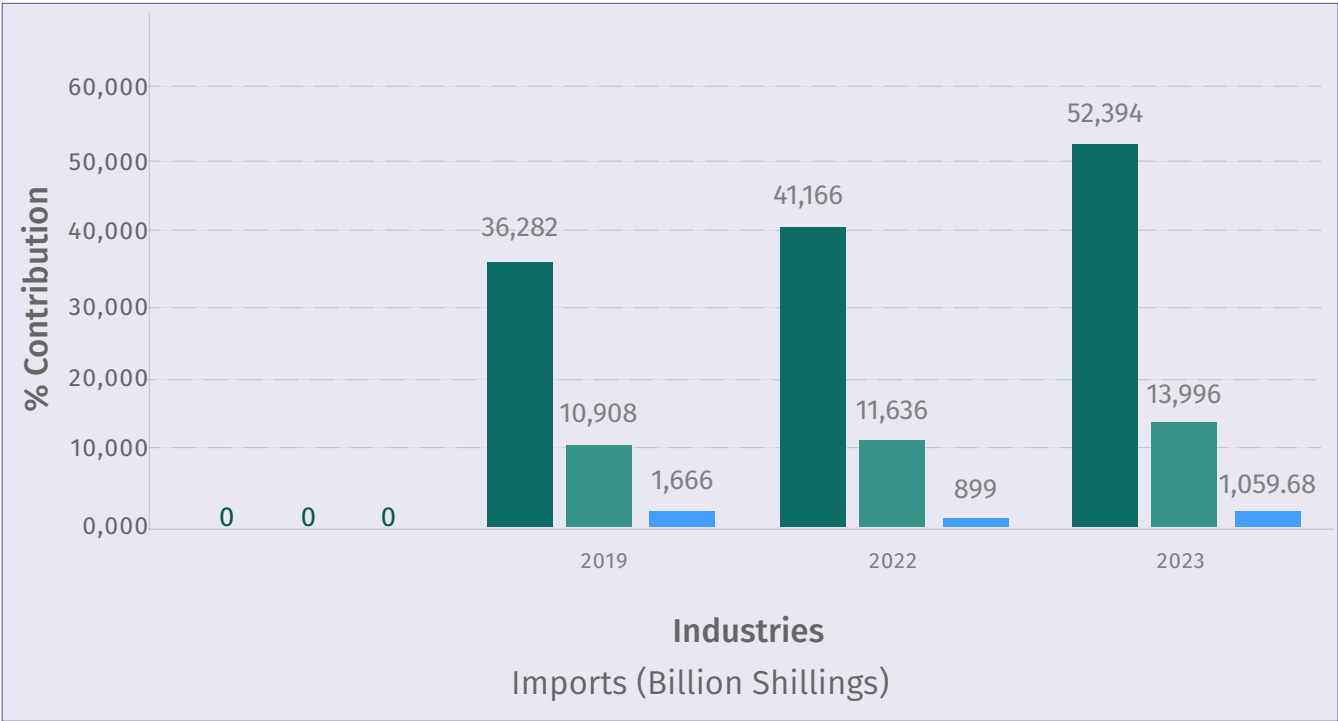
Table 19: Gross Fixed Capital Formation Vs Tourism Gross Fixed Capital Formation

GFCF in Billion UGX	2019	2022	2023	Growth Rate
Tourism Gross Fixed Capital Formation (TGFCF)	6,445	7,505	7,458	-0.6%
Total Gross Fixed Capital Formation (GFCF)	33,850	40,964	43,421	6.0%
Percentage Share of TGFCF	19.0%	18.3%	17.2%	-1.1%

Source: National accounts, UBOS

The main contributor to tourism specific assets was investment in accommodation for visitors estimated at UGX 4,480 billion, accounting for 60.15 percent of the total tourism assets in 2023 compared to 56.5 percent recorded in 2022. This was followed by other machinery and equipment specialized to produce tourism-characteristic products (17.0 percent). See Figure 9.1 below for details.

Figure 19: Tourism specific assets composition by tourism services



Source: National accounts, UBOS



A close-up photograph of a sloth hanging from a tree branch. The sloth has blue-grey fur and is positioned vertically, with its body wrapped around the branch. The background is a soft-focus green forest with sunlight filtering through the leaves.

10

TOURISM COLLECTIVE CONSUMPTION

CHAPTER 10 : TSA TABLE 9: TOURISM COLLECTIVE CONSUMPTION

10.1 INTRODUCTION

Collective consumption is the term used to describe a service that is provided simultaneously to all members of the community or to all members of a particular section, such as all households in a particular region or country. Collective services are automatically obtained and utilized by all members of the community, or a segment thereof, without any effort on their part.

"The provision of security and defense, the maintenance of law and order, the administration of laws and regulations, the preservation of public health, the protection of the environment, Research and development, infrastructure development, etc." are a few examples of collective services.

The Ugandan government exerts a substantial amount of influence over the growth of the tourism industry in the country. Tourism has been identified as one of the key drivers for social economic transformation in the National Development Framework.

10.2 TOURISM COLLECTIVE CONSUMPTION AND GOVERNMENT FINAL CONSUMPTION EXPENDITURE

Overall, tourism collective consumption grew by 33.8% from Ush 266.7 billion in 2022 to Ush 356.9 billion in 2023. Generally, there was an increase in Collective consumption in 2023 as compared to 2022. Government of Uganda's collective consumption (GCC) rose by 45.1% in 2023 as compared to 2022. However, the share of Tourism collective consumption to Government collective consumption dropped in 2023 (0.7%) as compared to 2022 (0.8%) as shown in table 9.1 below.

Table 20: Tourism Collective Consumption and Government Final Consumption Expenditure (GFCE), 2019-2023

Year	Tourism Collective consumption Ush Bn	Annual Growth rate	Government collective consumption (GCC) Ush Bn	Growth Rate	Share of TCC to GCC (In percent)
2019	903.4	0	37,480.5	0	2.4%
2022	266.7	-70.5%	34,967	-6.71%	0.8%
2023	356.9	33.8%	50,729.2	45.1%	0.7%

10.3 TOURISM COLLECTIVE CONSUMPTION BY CONSUMPTION PRODUCTS

Table 9.2 shows that total collective consumption largely related to tourism was valued at 356.9 billion Uganda shillings in 2023 which is a 33.8% increase compared to 2022.

The increase in collective tourism expenditure is largely associated with a 48.5% increase in the expenditures related to educational support services, 44.2% increase in expenditures related to tourism promotional services and a 12.5% increase in expenditures related to tourism public administration services. However, in comparison to 2019 where total tourism collective expenditure was Ush 903.4 billion, the tourism collective expenditure for 2023 is 60.5% lower than the 2019 levels of expenditure.

Table 21: Tourism Collective Consumption by Consumption products, 2019-2023

Products (*)	2019	2022	2023	% change 2023 Vs 2022
85561 Tourism promotion services (Ushs Bn)	188.2	170.6	245.9	44.2%
91136 Public administrative services related to tourism affairs (Ushs Bn)	705.6	83.3	93.7	12.6%
Part of:				
83700 Market research and public opinion poll-	1.2	0.3	0.3	0.0%
91260 Police and fire protection services	3.1	3.6	3.7	2.6%
92920 Educational support services (Ushs Bn)	5.3	8.9	13.2	48.5%
Total collective consumption Tourism	903.4	266.7	356.9	33.8%
Government collective consumption in Uganda	37,480.5	34,967	50,729.2	45.1%
%Age of Tourism Collective Consumption	2.4%	0.8%	0.7%	

10.4 TOURISM COLLECTIVE CONSUMPTION BY PRODUCTS AND LEVELS OF GOVERNMENT

About 99.9% of all tourism collective consumption in 2023 was incurred by the central Government of Uganda amounting to Ush 356.5 billion while local government tourism collective consumption mounted to 0.4 billion Uganda shillings. In 2023, 68.9% of all tourism related collective consumption was on Tourism promotion services amounting to Ush 245.9 billion. Other collective consumption products included Public administrative services related to tourism affairs (26.3%), Educational support services (3.7%), Police and fire protection services (1.1%) and Market research and public opinion poll (0.1%).

The memorandum item consisted of expenditure by private sector associations. Data was obtained from the Uganda Tourism Association (UTA), the umbrella institution for all tourism associations in Uganda. Expenditure by UTA and its member institutions on tourism promotional services in 2023 amounted to Ushs 0.9 billion.

Table 22: Tourism collective consumption by products and levels of government (billion Ushs) in 2023

Products (*)	Levels of government				Memorandum item (**)
	National	Regional	Local	Tourism collective consumption	
	{9.1}	{9.2}	{9.3}	(9.4) = (9.1) + (9.2) + (9.3)	Intermediate consumption by the tourism industries
85561 Tourism promotion services (Ushs Bn)	245.5	0	0.4	245.9	0.9
91136 Public administrative services related to tourism affairs (Ushs Bn)	93.7	0	0	93.7	
Part of:					
83700 Market research and public opinion poll-	0.3	0	0	0.3	
91260 Police and fire protection services	3.7	0	0	3.7	
92920 Educational support services (Ushs Bn)	13.2	0	0	13.2	
Total	356.5	0	0.4	356.9	0.9
Total collective consumption in Uganda				50,729.2	
%Age of Tourism Collective Consumption				0.7%	

Source: Various Government of Uganda Institutions



11

NON MONETARY INDICATORS



CHAPTER 11: TSA TABLE 10: NON-MONETARY INDICATORS

11.1 Introduction

This Table presents quantitative indicators that are important for the interpretation of the monetary information presented. The indicators include number of trips by forms of tourism, classes of visitors and duration of the stay; physical indicators regarding types of accommodation; modes of transport used by non-resident visitors travelling to the economic territory of the country of reference; and number and size of the establishments belonging to tourism industries. The data contained in this table will assist in the use of non-monetary indicators as a key element in tourism analysis.

The TSA Table 10 is divided into 4 sections:

1. Number of trips and overnights by forms of tourism and classes of visitors; tourists and excursionists for inbound, outbound, and domestic tourism.
2. Inbound tourism: number of arrivals and overnights by modes of transport
3. Number of establishments and capacity by types of accommodation
4. Number of establishments in tourism industries classified according to average number of jobs.

11.2 TSA Table 10a: Number of trips and overnights by forms of tourism and classes of visitors; tourists and excursionists for inbound, outbound, and domestic tourism.

Inbound Tourism

The total number of tourists (overnight visitors) increased from 772,825 visitors in 2022 to 1,089,356 visitors in 2023, representing 41.0 percent, while number of Excursionists (Same-day visitors) rose astronomically from 41,683 visitors to 184,854 visitors over the same period. The total number of nights by overnight visitors increased from 6.5 million nights in 2022 to 7.8 million nights in 2023.

Table 23: (TSA Table 10a): Number of trips and overnights for Inbound Tourism by forms of tourism and classes of visitors, 2019-2023

Inbound Tourism	2019		2022		2023		%age change (2022-2023)	
	Tourists	Excursionists	Tourists	Excursionists	Tourists	Excursionists	Tourists	Excursionists
Number of trips	1,468,876	73,744	772,825	41,683	1,089,356	184,854	41.0%	343.5%
Number of overnights	12,191,712		6,455,652		7,826,111		21.2%	

Source: The Tourism Expenditure and Motivation Survey and MTWA 2023 (TSA Committee)

Domestic Tourism

The total number of domestic tourism overnight trips reduced from 9.5 million trips in 2022 to 8.9 million trips in 2023, while same-day domestic tourism trips reduced from 14.2 million trips in 2022 to 8.2 million trips in 2023. Total Number of nights spent by domestic tourists reduced from 23.6 million nights in 2022 to 17.6 million nights in 2023. Overall, the period saw a decline of 5.9 percent in number of domestic tourism trips and 25.4 percent in number of nights spent.

Table 24: (TSA Table 10a): Number of trips and overnights for Domestic Tourism by forms of tourism and classes of visitors, 2019-2023

Domestic tourism	2019		2022		2023		%age change (2022-2023)	
	Tourists	Excursionists	Tourists	Excursionists	Tourists	Excursionists	Tourists	Excursionists
Number of trips	8,608,132	12,882,828	9,456,037	14,151,793	8,898,406	8,210,663	-5.9%	-42.0%
Number of overnights	21,490,958		23,607,830		17,617,643		-25.4%	

Source: Uganda National Household Survey 2023/24 and MTWA 2023 (TSA Committee)

Outbound Tourism

The total number of outbound trips increased by 40 percent in 2023 from 509,255 trips in 2022 to 711,265.

Table 25: (TSA Table 10a): Number of trips and overnights for outbound Tourism by forms of tourism and classes of visitors, 2019-2023

Outbound tourism	2019	2022	2023	%age change
Number of trips	488,406	509,255	711,265	40.0%
Number of overnights	4,758,080	7,129,570	8,535,180	20.0%

Source: Bank of Uganda Outbound Survey 2023 and MTWA 2023 (TSA Committee)

11.3 TSA Table 10b: inbound tourism: number of arrivals and overnights by modes of transport

In 2023, a total of 270,160 arrivals into the country were by air, while 1,004,050 arrivals entered through the land borders. The total number of arrivals in 2023 grew by 56.4 percent from 814,508 arrivals recorded in 2022.

Table 26: (TSA Table 10b): Inbound tourism: Number of arrivals and overnights by modes of transport, 2019-2023

Mode of transport	Number of Arrivals			%age change (2022-2023)
	2019	2022	2023	
Air	579,957	196,001	270,160	37.8%
Land	962,663	618,507	1,004,050	62.3%
Total	1,542,620	814,508	1,274,210	56.4%

Source: Uganda Migration Statistics 2023 (MoIA)

11.4 TSA Table 10c: Number of establishments and capacity by types of accommodation

In 2023, the number of short-term accommodation establishments including hotels, lodges, guest houses, and other accommodation facilities remained the same at 22,616 establishments.

This was due to the lack of up to date data for 2023. The same is true for both room and bed capacity which were 350,550 and 371,221 respectively years 2022 and 2023. Bed and room occupancy in 2023 stood at 50.4 percent and 53.9 percent respectively.

Table 27: (TSA Table 10c): Number of establishments and capacity by types of accommodation, 2019-2023

Short-term Accommodation Activities			
	2019	2022	2023
Number of establishments	22,616	22,616	22,616
Capacity (rooms)	350,550	350,550	350,550
Capacity (beds)	371,221	371,221	371,221
Capacity utilization (beds)	45.8%	46.1%	50.4%
Capacity utilization (rooms)	51.9%	46.9%	53.9%

Source: UBOS Quarterly Accommodation Surveys 2023

11.5 TSA Table 10d: Number of establishments in tourism industries

The largest number of tourism establishments are in the Food and beverage serving industry (834,222 establishments). This accounts for over 83 percent of all tourism related establishments in the country. Road, Air, Rail and Water passenger transport establishments were 102,908 in 2023, accounting for 10 percent, while 37,134 establishments were in the Cultural, Sports and recreation industry.

Table 28: (TSA Table 10d): Number of establishments in tourism industries classified according to average number of jobs (2019-2023)

Tourism industries	2019	2022	2023	% composition (2023)
Accommodation for visitors	22,616	22,616	22,616	2.0%
Food- and beverage-serving industry	834,222	834,222	834,222	84.0%
Road, Air, Rail and Water passenger transport	102,908	102,908	102,908	10.0%
Travel agencies and other reservation services industry	1,996	1,996	1,996	0.0%
Cultural, Sports and recreation industry	37,134	37,134	37,134	4.0%
Total	998,876	998,876	998,876	100%

Source: MAPU 2016/17

A large crowd of people is gathered in the background, many holding umbrellas. In the foreground, four men in red robes are walking, carrying religious objects. A rainbow flag is draped across the bottom of the image.

12

CONCLUSION

CHAPTER 12 : CONCLUSION

The Tourism Satellite Account (TSA) is an accounting framework adopted by the UN Tourism formerly United Nations World Tourism Organization (UNWTO), and was designed to measure goods and services associated with tourism according to international standards, concepts, classifications, and definitions. The direct economic contribution of Tourism to the economy of Uganda for the year 2023 was measured through the compilation of the 10 TSA tables. The ten tables were systematically compiled using primary and secondary data. It analysed all aspects of demand for goods and services associated with the tourism sector within the economy, monitored the operational interface of the supply of such goods and services, and evaluated how supply interacts with other economic activities.

The Uganda Tourism Satellite Account Report for the year 2023 establishes the direct contribution of Tourism to the economy using the recommended Tourism Satellite Account methodology. The specific goals were to;

1. Estimate tourism demand and supply,
2. Assess value added by tourism activities to the economy,
3. Establish the level of employment generated by the tourism activities,
4. Measure the gross fixed capital formation by the sector, and
5. Measure the collective consumption of tourism services by the Government.

The Uganda TSA was developed to respond to these objectives by establishing macroeconomic aggregates that describe the size and economic contribution of different forms of tourism. This required gathering data on tourism consumption (inbound, Domestic and Outbound tourism), domestic supply and imports, and compilation of detailed production accounts of the tourism industries.

The compilation of the UTSA for the year 2023 was based on the Tourism Satellite Account: Recommended Methodological Framework (TSA: RMF 2008) and International Recommendations for Tourism Statistics (2008). The compilation of the Uganda TSA used the following data sources; the Tourism Expenditure and Motivation Survey 2023, Uganda National Household Survey 2023/24, Bank of Uganda Outbound Travel Survey (2023), Arrival and Departure Statistics (UBOS) and Macroeconomic aggregates from National Accounts.

In 2023, Uganda welcomed 1,274,210 international visitors (inbound tourism), who spent an average of 7.6 nights. The total amount of inbound tourism (tourism exports) in 2023 was UGX 3,818.6 billion, a significant increase from UGX 2,571.53 billion in 2022 (TSA Table 1).

Uganda's domestic tourism has steadily grown, with visitor numbers rising from 2.66 million in 2022 to 2.80 million in 2023, a 5.2 percent increase. Domestic tourism expenditure was estimated at UGX 5.09 trillion in 2023, up from UGX 3.68 trillion in 2022, contributing 4.0% to Household Final Consumption Expenditure (HFCE) (TSA Table 2).

A total of 711,265 Ugandan Residents travelled abroad for a foreign trip in 2023 (Outbound Tourists) mainly for personal visits such as Holiday and Leisure. Outbound tourism expenditure (tourism imports) rose by 17.9%, from UGX 899 billion in 2022 to UGX 1,059.7 billion in 2023. (TSA Table 3).

Internal tourism expenditure of Uganda was estimated at UGX 8,909.4 billion in 2023, 42.6 percent higher compared with UGX 6,246.8 billion in 2022 (covering both international and domestic tourism expenditure) (TSA Table 4). The 2025 UTSA report estimates the internal tourism consumption at UGX 9,157.1 billion in 2023 compared to 6,668.2 billion in 2022, a 37.3 per cent (or UGX 2,488.9 billion) increase from 2022 covering internal tourism expenditure plus other components of tourism consumption amounting to UGX 247.8 billion in 2023 compared to 421.4 billion in 2022 mainly by inbound tourists. (TSA Table 4).

Internal Tourism Consumption contributed 6.0 percent to Household Final Consumption Expenditure (HFCE) and Exports in 2023, up from 4.8 percent in 2022.

The total output at basic prices for tourism industries in 2023 was estimated at UGX 12,026 billion, a 12.4 percent increase from UGX 10,695 billion in 2022. This growth was driven primarily by increased food and beverage services, air and road passenger transport services and accommodation services which collectively accounted for 89.1 percent of the total tourism industry output. The Gross Value added for tourism-related industries was estimated at UGX 7,311 billion in 2023 compared to UGX 6,592 billion in 2022, representing a 10.9 percent increase (TSA Table 5).

Uganda's tourism exports exceeded tourism imports, resulting in a UGX 2,759 billion trade surplus in 2023, up from UGX 1,673 billion in 2022. This improvement highlights tourism's positive contribution to Uganda's balance of payments position, despite the overall goods and services balance registering a deficit of UGX 18,035 billion. Tourism Exports accounted for 15.8 percent of total exports and 69.7 percent of service exports, up 65 percent from 2022. Tourism imports accounted for 8 percent of service imports and 2.5 percent of total imports. (TSA Table 6).

Tourism Direct GDP (TDGDP) reached UGX 6,061 billion in 2023, marking a 34.6 percent increase from UGX 4,502 billion in 2022, and contributing 3.2 percent to Uganda's GDP (up from 2.5 percent in 2022). This improvement was mainly driven by increased demand and supply of accommodation services. The Tourism Direct Gross Value Added (TDGVA) increased by 26.5 percent to UGX 5,692 billion in 2023, contributing 3.2 percent to national GVA, up from 2.6 percent in 2022 (TSA Table 6).

Tourism-generated taxes increased to UGX 370 billion in 2023, contributing 2.6 percent to total tax revenue, up from UGX 280 billion (2.1 percent) in 2022. This highlights tourism's growing importance to Uganda's fiscal base, with a notable UGX 90 billion year-over-year increase. (TSA Table 6)

In 2023, Uganda's internal tourism demand increased to UGX 9,157 billion, raising the demand-to-supply ratio to 68.9% (up from 54.8% in 2022), indicating stronger domestic consumption of tourism services. Approximately 69% of available tourism services were utilized, reflecting improved alignment between supply and traveler demand.

Direct employment in tourism grew by 31.6 percent, adding 192,885 new jobs, bringing total direct employment to 803,691 workers in 2023, up from 610,806 workers in 2022. Tourism directly accounted for 7.2 percent of total employment, ranking as the fifth highest employer in the country, after Agriculture, Trade, Manufacturing and Transport and storage. 52.2 percent of tourism workers were self-employed and the industry was male dominated, with 75.1 percent. (TSA Table 7)

Total Tourism Gross Fixed Capital Formation (GFCF) amounted to 7,458 billion in 2023 representing 17.2 percent of the total GFCF in the economy. Tourism's share in the GFCF has declined from 18.3 percent in 2022, a 1.1 percentage point drop. (TSA Table 8)

Tourism Collective Consumption was estimated at UGX 356.9 billion in 2023, up 33.8 percent from UGX 266.7 billion in 2022. This growth was driven by increase in educational support services, tourism promotional services and tourism public administration services. Tourism contributed 0.7 percent to total collective consumption in 2023 (TSA Table 9).

The Uganda TSA 2023 underscores the growing significance of tourism in Uganda's economy with notable increase in GDP contribution, employment, exports, tax contributions and internal tourism expenditure.

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APPENDICES

APPENDIX 1: Inbound Tourism (TSA Table 1)

Appendix 1 Table 1: Basic Data and Indicators for Inbound Tourism 2019 - 2023

1	INBOUND TOURISM	Units	2019	2022	2023
	Data				
	Arrivals				
1.1	Total	('000)	1,542,620	814,508	1,274,210
1.2	Overnight visitors (tourists)	('000)	1,468,876	772,825	1,142,874
1.3	Same-day visitors (excursionists)	('000)	73,744	41,683	131,336
1.4	*Of which, cruise passengers	('000)			
	Arrivals by region				
1.5	Total	('000)	1,542,620	814,508	1,274,210
1.6	Africa	('000)	1,044,227	714,677	1,136,233
1.7	Americas	('000)	150,440	17,635	23,691
1.8	East Asia and the Pacific	('000)	38,335	10,664	18,281
1.9	Europe	('000)	248,800	29,821	42,056
1.1	Middle East	('000)	29,858	1,475	1,550
1.11	South Asia	('000)	30,960	31,075	40,554
1.12	Other not classified	('000)		9,161	11,845
1.13	* of which, nationals residing abroad	('000)			
	Arrivals by main purpose				
1.14	Total	('000)	1,542,620	814,508	1,274,210
1.15	Personal	('000)	911,688	517,055	937,362
1.16	*Holidays, leisure and recreation	('000)	297,726	95,394	199,716
1.17	*Other personal purposes	('000)	613,962	421,661	737,646
1.18	Business and professional	('000)	630,932	297,453	336,848
	Arrivals by mode of transport				
1.19	Total	('000)	1,542,620	814,508	1,274,210
1.2	Air	('000)	579,957	196,001	270,160
1.21	Water	('000)			
1.22	Land	('000)	962,663	618,507	1,004,050
1.23	*Railway	('000)			
1.24	*Road	('000)	962,663	618,507	1,004,050
1.25	*Others	('000)			
	Arrivals by form of organization of the trip				
1.26	Total	('000)	1,542,620		
1.27	Package tour	('000)	125,302		
1.28	Other forms	('000)	1,417,318		
	Indicators				
1.39	Average size of travel party	Persons	1.9		
	Average length of stay		8.3	7.4	
1.44	Average expenditure per day	US\$	111	112	

Source: Arrival and Departure Statistics (UBOS), 2022, UBOS Statistical Abstract 2024

Appendix 1 Table 2: Inbound Tourism Expenditure by Products, Uganda, 2019-2023

CONSUMPTION PRODUCTS (*)	2019	2022	2023
A.1. Tourism characteristic products			
1. Accommodation services for visitors	1,786.7	1,011.8	1,411.8
2. Food- and beverage-serving services	1,084.2	499.3	778.8
3. Railway passenger transport services	0.0	0.0	0.0
4. Air & Road passenger transport services	574.5	353.9	438.8
5. Water passenger transport services	14.5	6.2	98.6
6. Air passenger transport services	0.0	0.0	0.0
7. Transport equipment rental services	0.0	40.1	38.6
8. Travel agencies and other reservation services	157.9	158.8	320.3
9. Cultural services	269.4	171.8	313.3
10. Sports and recreational services	123.6	127.0	101.2
11. Country-specific tourism characteristic services	0.0	0.0	0.0
12. Country-specific tourism characteristic services	0.0	0.0	0.0
A.2. Other consumption products (a)			
1. Health and Medical Care	0.0	89.5	53.2
2. Retail Trade	17.2	7.0	0.4
B.1. Valuables	0.0	0.0	0.0
B.2. Other	552.3	106.1	263.7
TOTAL INBOUND TOURISM EXPENDITURE	4,580.4	2,571.5	3,818.6

Source: Tourism Expenditure and Motivation Survey Report, 2023 (MTWA), Arrival and Departure Statistics (UBOS), 2023,

Appendix 1 Table 3: Inbound Tourism Expenditure by Products, Uganda (in percent): 2019-2023

CONSUMPTION PRODUCTS (*)	2019	2022	2023
A.1. Tourism characteristic products			
1. Accommodation services for visitors	39.0%	39.3%	37.0%
2. Food- and beverage-serving services	23.7%	19.4%	20.4%
3. Railway passenger transport services	0.0%	0.0%	0.0%
4. Air & Road passenger transport services	12.5%	13.8%	11.5%
5. Water passenger transport services	0.3%	0.2%	2.6%
6. Air passenger transport services	0.0%	0.0%	0.0%
7. Transport equipment rental services	0.0%	1.6%	1.0%
8. Travel agencies and other reservation services	3.4%	6.2%	8.4%
9. Cultural services	5.9%	6.7%	8.2%
10. Sports and recreational services	2.7%	4.9%	2.6%
11. Country-specific tourism characteristic services	0.0%	0.0%	0.0%
12. Country-specific tourism characteristic services	0.0%	0.0%	0.0%
A.2. Other consumption products (a)			
1. Health and Medical Care	0.0%	3.5%	1.4%
2. Retail Trade	0.4%	0.3%	0.0%
B.1. Valuables			
B.2. Other	12.1%	4.1%	6.9%
TOTAL INBOUND TOURISM EXPENDITURE	100%	100%	100%

Source: Tourism Expenditure and Motivation Survey Report, 2024 (MTWA), Arrival and Departure Statistics (UBOS), 2023,

Appendix 1 Table 4: Inbound Tourism Expenditure by Products, Uganda, Growth Rates (in percent): 2019-2023

CONSUMPTION PRODUCTS (*)	2019	2022	2023
A.1. Tourism characteristic products			
1. Accommodation services for visitors		-43.4%	39.5%
2. Food- and beverage-serving services		-53.9%	56.0%
3. Railway passenger transport services			
4. Road passenger transport services		-38.4%	24.0%
5. Water passenger transport services		-57.7%	1503.2%
6. Air passenger transport services			
7. Transport equipment rental services			
8. Travel agencies and other reservation services		0.6%	101.7%
9. Cultural services		-36.2%	82.3%
10. Sports and recreational services		2.7%	-20.3%
11. Country-specific tourism characteristic services			
12. Country-specific tourism characteristic services			
A.2. Other consumption products (a)			
1. Health and Medical Care			
2. Retail Trade		-59.2%	-94.3%
B.1. Valuables			
B2. Other		-80.8%	148.4%
TOTAL INBOUND TOURISM EXPENDITURE		-43.9%	48.5%

Source: Tourism Expenditure and Motivation Survey Report, 2023 (MTWA), Arrival and Departure Statistics (UBOS), 2023,

APPENDIX 2: Domestic Tourism (TSA Table 2)

Appendix 2 Table 1: Domestic Tourism Expenditure by Products, Uganda, 2019-2023

CONSUMPTION PRODUCTS (*)	2019	2022	2023
A.1. Tourism characteristic products			
1. Accommodation services for visitors	223.8	220.1	780.3
2. Food- and beverage-serving services	583.8	709.9	995.8
3. Railway passenger transport services	0.0	0.0	0.0
4. Air & Road passenger transport services	1,837.1	2,335.3	2,866.7
5. Water passenger transport services	0.0	0.0	20.2
6. Air passenger transport services	0.0	0.0	0.0
7. Transport equipment rental services	42.5	63.5	64.1
8. Travel agencies and other reservation services	1.5	3.8	15.1
9. Cultural services	40.2	51.0	22.6
10. Sports and recreational services	22.7	26.5	64.9
11. Country-specific tourism characteristic services	0.0	0.0	0.0
12. Country-specific tourism characteristic services	0.0	0.0	0.0
A.2. Other consumption products (a)	0.0	0.0	0.0
1. Retail Trade	0.0	0.0	0.0
B.1. Valuables	0.0	0.0	0.0
B2. Other	214.4	265.3	261.0
TOTAL DOMESTIC TOURISM EXPENDITURE	2,965.9	3,675.2	5,090.7

Source: Uganda National Household Survey (UNHS) FY 2023/24, Uganda Bureau of Statistics

Appendix 2 Table 2: Domestic Tourism Expenditure by Products, Uganda (in percent): 2019-2022

CONSUMPTION PRODUCTS (*)	2019	2022	2023
A.1. Tourism characteristic products			
1. Accommodation services for visitors	7.5%	6.0%	15.3%
2. Food- and beverage-serving services	19.7%	19.3%	19.6%
3. Railway passenger transport services	0.0%	0.0%	0.0%
4. Road passenger transport services	61.9%	63.5%	56.3%
5. Water passenger transport services	0.0%	0.0%	0.4%
6. Air passenger transport services	0.0%	0.0%	0.0%
7. Transport equipment rental services	1.4%	1.7%	1.3%
8. Travel agencies and other reservation services	0.1%	0.1%	0.3%
9. Cultural services	1.4%	1.4%	0.4%
10. Sports and recreational services	0.8%	0.7%	1.3%
11. Country-specific tourism characteristic services	0.0%	0.0%	0.0%
12. Country-specific tourism characteristic services	0.0%	0.0%	0.0%
A.2. Other consumption products (a)	0.0%	0.0%	0.0%
1. Retail Trade	0.0%	0.0%	0.0%
B.1. Valuables	0.0%	0.0%	0.0%
B2. Other	7.2%	7.2%	5.1%
TOTAL DOMESTIC TOURISM EXPENDITURE	100.0%	100.0%	100.0%

Source: Uganda National Household Survey (UNHS), Uganda Bureau of Statistics

Appendix 2 Table 3: Domestic Tourism Expenditure by Products, Uganda, Growth Rates (in percent): 2019-2022

CONSUMPTION PRODUCTS (*)	2019	2022	2023
A.1. Tourism characteristic products			
1. Accommodation services for visitors		-1.6%	254.5%
2. Food- and beverage-serving services		21.6%	40.3%
3. Railway passenger transport services			
4. Road passenger transport services		27.1%	22.8%
5. Water passenger transport services			
6. Air passenger transport services			
7. Transport equipment rental services		49.4%	1.1%
8. Travel agencies and other reservation services		147.4%	295.5%
9. Cultural services		26.8%	-55.7%
10. Sports and recreational services		17.0%	144.9%
11. Country-specific tourism characteristic services			
12. Country-specific tourism characteristic services			
A.2. Other consumption products (a)			
1. Retail Trade			
B.1. Valuables			-100.0%
B2. Other		23.7%	-1.6%
TOTAL DOMESTIC TOURISM EXPENDITURE		23.9%	38.5%

Source: Uganda National Household Survey (UNHS), Uganda Bureau of Statistics

APPENDIX 3: Outbound Tourism (TSA Table 3)

Appendix 3 Table 1: Outbound Tourism Expenditure by Products, Uganda, 2019-2022

CONSUMPTION PRODUCTS (*)	2019	2022	2023
A.1. Tourism characteristic products			
1. Accommodation services for visitors	605.8	220.9	260.4
2. Food- and beverage-serving services	217.9	108.7	128.2
3. Railway passenger transport services	0.0	0.0	0.0
4. Road passenger transport services	125.3	124.8	147.1
5. Water passenger transport services	0.0	0.0	0.0
6. Air passenger transport services	0.0	136.7	161.2
7. Transport equipment rental services	0.0	0.0	0.0
8. Travel agencies and other reservation services	0.0	48.5	57.2
9. Cultural services	0.0	43.5	51.3
10. Sports and recreational services	0.0	0.0	0.0
11. Country-specific tourism characteristic services	0.0	21.5	25.3
12. Country-specific tourism characteristic services	0.0	3.6	4.2
A.2. Other consumption products (a)	717.3	190.8	224.9
B.1. Valuables			
TOTAL OUTBOUND TOURISM EXPENDITURE	1,666.3	899.0	1,059.7

Source: Bank of Uganda Quarterly Outbound Survey, 2023, Arrival and Departure Statistics (UBOS). UBOS Statistical Abstract 2024

Appendix 3 Table 2: Outbound Tourism Expenditure by Products, Uganda (in percent): 2019-2022

CONSUMPTION PRODUCTS (*)	2019	2022	2023
A.1. Tourism characteristic products	36.4%	24.6%	24.6%
1. Accommodation services for visitors	13.1%	12.1%	12.1%
2. Food- and beverage-serving services	0.0%	0.0%	0.0%
3. Railway passenger transport services	7.5%	13.9%	13.9%
4. Road passenger transport services	0.0%	0.0%	0.0%
5. Water passenger transport services	0.0%	15.2%	15.2%
6. Air passenger transport services	0.0%	0.0%	0.0%
7. Transport equipment rental services	0.0%	5.4%	5.4%
8. Travel agencies and other reservation services	0.0%	4.8%	4.8%
9. Cultural services	0.0%	0.0%	0.0%
10. Sports and recreational services	0.0%	2.4%	2.4%
11. Country-specific tourism characteristic services	0.0%	0.4%	0.4%
12. Country-specific tourism characteristic services		21.2%	21.2%
A.2. Other consumption products (a)	43.0%	0.0%	0.0%
B.1. Valuables			
TOTAL OUTBOUND TOURISM EXPENDITURE	100%	100%	100%

Source: Bank of Uganda Quarterly Outbound Survey, 2023, Arrival and Departure Statistics (UBOS). UBOS Statistical Abstract 2024

Appendix 3 Table 3: Outbound Tourism Expenditure by Products, Uganda, Growth Rates (in percent): 2019-2022

CONSUMPTION PRODUCTS (*)	2019	2022	2023
A.1. Tourism characteristic products			
1. Accommodation services for visitors		-63.5%	17.9%
2. Food- and beverage-serving services		-50.1%	17.9%
3. Railway passenger transport services			
4. Road passenger transport services		-0.4%	17.9%
5. Water passenger transport services			
6. Air passenger transport services			17.9%
7. Transport equipment rental services			
8. Travel agencies and other reservation services			17.9%
9. Cultural services			17.9%
10. Sports and recreational services			
11. Country-specific tourism characteristic services			17.9%
12. Country-specific tourism characteristic services			17.9%
A.2. Other consumption products (a)		-73.4%	17.9%
B.1. Valuables			
TOTAL OUTBOUND TOURISM EXPENDITURE		-46.0%	17.9%

Source: Bank of Uganda Quarterly Outbound Survey, 2022, Arrival and Departure Statistics (UBOS). UBOS Statistical Abstract 2023

APPENDIX 4: Internal Tourism Consumption (TSA Table 4)

Appendix 4 Table 1: Internal Tourism Expenditure by Product at Current Prices, Uganda, 2019-2023

CONSUMPTION PRODUCTS (*)	2019	2022	2023
A.1. Tourism characteristic products			
1. Accommodation services	2,010.5	1,231.9	2,129.1
2. Food- and beverage-serving services	1,667.9	1,209.2	1,774.6
3. Railway passenger transport services	-	-	-
4. Road passenger transport services	2,411.5	2,689.1	3,305.5
5. Water passenger transport services	14.5	6.2	118.8
6. Air passenger transport services	-	-	-
7. Transport equipment rental services	42.5	103.6	102.8
8. Travel agencies and other reservation services	159.5	162.6	335.4
9. Cultural services	309.6	222.8	335.9
10. Sports and recreational services	146.3	153.5	166.1
11. Others	-	-	578.3
12. Retail trade	-	-	-
A.2. Other consumption products (a)	-	-	-
1. Retail Trade	17.2	7.0	-
2. Others	766.7	460.9	-
B.1. Valuables	-	-	-
TOTAL INTERNAL TOURISM EXPENDITURE	7,546.3	6,246.8	8,909.4

Source: Tourism Expenditure and Motivation Survey Report, 2023 (MTWA), Arrival and Departure Statistics (UBOS), 2023, BOU Outbound Travel Survey 2023 and the Uganda National Household Survey (UBOS) UNHS FY 2023/24

Appendix 4 Table 2: Internal Tourism Expenditure by Product at Current Prices, Uganda, 2019-2022 Percent share to Total (in percent)

CONSUMPTION PRODUCTS (*)	2019	2022	2023
A.1. Tourism characteristic products			
1. Accommodation services for visitors	26.6%	19.7%	24.6%
2. Food- and beverage-serving services	22.1%	19.4%	19.9%
3. Railway passenger transport services	0.0%	0.0%	0.0%
4. Road passenger transport services	32.0%	43.0%	37.1%
5. Water passenger transport services	0.2%	0.1%	1.3%
6. Air passenger transport services	0.0%	0.0%	0.0%
7. Transport equipment rental services	0.6%	1.7%	1.2%
8. Travel agencies and other reservation services	2.1%	2.6%	3.8%
9. Cultural services	4.1%	3.6%	3.8%
10. Sports and recreational services	1.9%	2.5%	1.9%
11. Country-specific tourism characteristic services	0.0%	0.0%	6.5%
12. Country-specific tourism characteristic services	0.0%	0.0%	0.0%
A.2. Other consumption products (a)	0.0%	0.0%	0.0%
1. Retail Trade	0.2%	0.1%	0.0%
2. Others	10.2%	7.4%	0.0%
B.1. Valuables	0.0%	0.0%	0.0%
TOTAL INTERNAL TOURISM EXPENDITURE	100.0%	100.0%	100.0%

Source: Tourism Expenditure and Motivation Survey Report, 2023 (MTWA), Arrival and Departure Statistics (UBOS), 2023, BOU Outbound Travel Survey 2023 and the Uganda National Household Survey (UBOS) UNHS FY 2023/24

Appendix 4 Table 3: Internal Tourism Expenditure by Product at Current Prices Growth rates (in percent), Uganda, 2019-2022

CONSUMPTION PRODUCTS (*)	2019	2022	2023
A.1. Tourism characteristic products			
1. Accommodation services for visitors		-38.7%	77.9%
2. Food- and beverage-serving services		-27.5%	46.8%
3. Railway passenger transport services			
4. Road passenger transport services		11.5%	22.9%
5. Water passenger transport services		-57.7%	1831.7%
6. Air passenger transport services			
7. Transport equipment rental services		143.8%	-0.8%
8. Travel agencies and other reservation services		2.0%	106.2%
9. Cultural services		-28.0%	50.8%
10. Sports and recreational services		5.0%	8.2%
11. Country-specific tourism characteristic services			
12. Country-specific tourism characteristic services			
A.2. Other consumption products (a)			
1. Retail Trade		-59.2%	-100.0%
2. Others		-39.9%	-100.0%
B.1. Valuables			
TOTAL INTERNAL TOURISM EXPENDITURE		-17.2%	42.6%

Source: Tourism Expenditure and Motivation Survey Report, 2023 (MTWA), Arrival and Departure Statistics (UBOS), 2023, BOU Outbound Travel Survey 2023 and the Uganda National Household Survey (UBOS) UNHS FY 2023/24

Appendix 4 Table 4: Internal Tourism Consumption by Product at Current Prices, Uganda, 2019-2023

CONSUMPTION PRODUCTS (*)	2019	2022	2023
1. Accommodation services	2,290.5	1,513.7	2,351.5
2. Food- and beverage-serving services	1,838.6	1,348.7	1,862.9
3. Railway passenger transport services	-	-	-
4. Road passenger transport services	2,411.5	2,689.1	3,305.5
5. Water passenger transport services	14.5	6.2	118.8
6. Air passenger transport services	-	-	-
7. Transport equipment rental services	42.5	103.6	102.8
8. Travel agencies and other reservation services	159.5	162.6	335.4

CONSUMPTION PRODUCTS (*)	2019	2022	2023
9. Cultural services	309.6	222.8	335.9
10. Sports and recreational services	146.3	153.5	166.1
11. Others	766.7	460.9	578.3
12. Retail trade	17.2	7.0	-
TOTAL INTERNAL TOURISM CONSUMPTION	7,996.9	6,668.2	9,157.1

Source: Tourism Expenditure and Motivation Survey Report, 2023 (MTWA), Arrival and Departure Statistics (UBOS), 2023, BOU Outbound Travel Survey 2023 and the Uganda National Household Survey (UBOS) UNHS FY 2023/24

Appendix 4 Table 5: Internal Tourism Consumption by Product at Current Prices, Percent share to Total (in percent) Uganda, 2019-2023

CONSUMPTION PRODUCTS (*)	2019	2022	2023
1. Accommodation services	28.6%	22.7%	25.7%
2. Food- and beverage-serving services	23.0%	20.2%	20.3%
3. Railway passenger transport services	0.0%	0.0%	0.0%
4. Road passenger transport services	30.2%	40.3%	36.1%
5. Water passenger transport services	0.2%	0.1%	1.3%
6. Air passenger transport services	0.0%	0.0%	0.0%
7. Transport equipment rental services	0.5%	1.6%	1.1%
8. Travel agencies and other reservation services	2.0%	2.4%	3.7%
9. Cultural services	3.9%	3.3%	3.7%
10. Sports and recreational services	1.8%	2.3%	1.8%
11. Others	9.6%	6.9%	6.3%
12. Retail trade	0.2%	0.1%	0.0%
TOTAL INTERNAL TOURISM CONSUMPTION	100%	100%	100%

Source: Tourism Expenditure and Motivation Survey Report, 2023 (MTWA), Arrival and Departure Statistics (UBOS), 2023, BOU Outbound Travel Survey 2023 and the Uganda National Household Survey (UBOS) UNHS FY 2023/24

Appendix 4 Table 6: Internal Tourism Consumption by Product at Current Prices, Uganda, 2019-2023, Growth rates (in percent)

CONSUMPTION PRODUCTS (*)	2019	2022	2023
1. Accommodation services		-33.9%	55.3%
2. Food- and beverage-serving services		-26.6%	38.1%
3. Railway passenger transport services			
4. Road passenger transport services		11.5%	22.9%
5. Water passenger transport services		-57.7%	1831.7%
6. Air passenger transport services			
7. Transport equipment rental services		143.8%	-0.8%
8. Travel agencies and other reservation services		2.0%	106.2%
9. Cultural services		-28.0%	50.8%
10. Sports and recreational services		5.0%	8.2%
11. Others		-39.9%	25.5%
12. Retail trade		-59.2%	-100.0%
TOTAL INTERNAL TOURISM CONSUMPTION		-16.6%	37.3%

Source: Tourism Expenditure and Motivation Survey Report, 2023 (MTWA), Arrival and Departure Statistics (UBOS), 2023, BOU Outbound Travel Survey 2023 and the Uganda National Household Survey (UBOS) UNHS FY 2023/24

Appendix 4 Table 7: Tourism expenditure by product, 2023

Year	International Tourism Expenditure		Domestic Tourism Expenditure		Total Tourism Expenditure		Total Exports of Goods and Services	Share of International Tourism Expenditure to Total Export
	UGX Bns	Annual % Change	UGX Bns	Annual % Change	UGX Bns	Annual % Change		
2019	4,580.4		2,965.9		7,546.3		22,860.1	20.0%
2022	2,571.5	-43.9%	3,675.2	23.9%	6,246.8	-17.2%	19,692.5	13.1%
2023	3,818.6	48.5%	5,090.7	38.5%	8,909.4	42.6%	24,239.1	15.8%

Source: Tourism Expenditure and Motivation Survey Report, 2023 (MTWA), Arrival and Departure Statistics (UBOS), 2023, BOU Outbound Travel Survey 2023 and the Uganda National Household Survey (UBOS) UNHS FY 2023/24

APPENDIX 5: Production Accounts Tourism (TSA Table 5)

Appendix 5 Table 1: Production Accounts for Tourism Industries at Current Prices: 2019-2023

Tourism Industries	2019	2022	2023
1. Accommodation services	3,090.0	2,747.3	3,128.9
2. Food- and beverage-serving services	2,992.7	3,441.9	4,028.4
3. Railway passenger transport services			
4. Air and Road passenger transport services	2,832.7	3,371.6	3,553.9
5. Water passenger transport services	24.7	51.1	79.4
6. Air passenger transport services		-	
7. Transport equipment rental services	73.1	106.4	106.3
8. Travel agencies and other reservation services	239.1	278.4	327.4
9. Cultural services	292.8	294.6	378.8
10. Sports and recreational services	237.9	178.3	211.7
11. Others			
12. Retail trade	206.1	225.6	211.7
Total	9,989.2	10,695.3	12,026.4

Source: National Accounts (UBOS)

Appendix 5 Table 2: Production Accounts for Tourism Industries at Current Prices Percent share to Total (in percent): 2019-2022

Tourism Industries	2019	2022	2023
1. Accommodation services	30.9%	25.7%	26.0%
2. Food- and beverage-serving services	30.0%	32.2%	33.5%
3. Railway passenger transport services	0.0%	0.0%	0.0%
4. Road passenger transport services	28.4%	31.5%	29.6%
5. Water passenger transport services	0.2%	0.5%	0.7%
6. Air passenger transport services	0.0%	0.0%	0.0%
7. Transport equipment rental services	0.7%	1.0%	0.9%
8. Travel agencies and other reservation services	2.4%	2.6%	2.7%
9. Cultural services	2.9%	2.8%	3.1%
10. Sports and recreational services	2.4%	1.7%	1.8%
11. Others	0.0%	0.0%	0.0%
12. Retail trade	2.1%	2.1%	1.8%
Total	100.0%	100.0%	100.0%

Source: National Accounts (UBOS)

Appendix 5 Table 3: Production Accounts for Tourism Industries at Current Prices Growth rates (in percent): 2019-2023

Tourism Industries	2019	2022	2023
1. Accommodation services		-11.1%	13.9%
2. Food- and beverage-serving services		15.0%	17.0%
3. Railway passenger transport services			
4. Road passenger transport services		19.0%	5.4%
5. Water passenger transport services		106.6%	55.2%
6. Air passenger transport services			
7. Transport equipment rental services		45.6%	-0.1%
8. Travel agencies and other reservation services		16.5%	17.6%
9. Cultural services		0.6%	28.6%
10. Sports and recreational services		-25.1%	18.7%
11. Others			
12. Retail trade		9.4%	
Total		7.1%	12.4%

Source: National Accounts (UBOS)

Appendix 5 Table 4: Gross Value Added of Tourism Industries (GVATI) by Industry, Uganda: 2019-2023, in billion Uganda shillings

Products	2019	2022	2023
1. Accommodation services	2,106	1,834	2,074
2. Food- and beverage-serving services	1,798	1,980	2,280
3. Air and road passenger transport services	1,741	2,111	2,330
4. Water passenger transport services	15	30	47
5. Transport equipment rental services	41	61	64
6. Travel agencies and other reservation services	111	157	195
7. Cultural services	155	164	213
8. Sports and recreational services	113	86	108
9. Others	154	170	160
Total Gross Value Added of Tourism Industries (GVATI)	6,233	6,592	7,471

Source: National Accounts (UBOS)

Appendix 5 Table 5: Gross Value Added of Tourism Industries (GVATI) by Industry, Share to Total; (percent), Uganda: 2019-2023

Products	2019	2022	2023
1. Accommodation services	33.8%	27.8%	27.8%
2. Food- and beverage-serving services	28.8%	30.0%	30.5%
3. Air and road passenger transport services	27.9%	32.0%	31.2%
4. Water passenger transport services	0.2%	0.5%	0.6%
5. Transport equipment rental services	0.7%	0.9%	0.9%
6. Travel agencies and other reservation services	1.8%	2.4%	2.6%
7. Cultural services	2.5%	2.5%	2.9%
8. Sports and recreational services	1.8%	1.3%	1.4%
9. Others	2.5%	2.6%	2.1%
Total Gross Value Added of Tourism Industries (GVATI)	100.0%	100.0%	100.0%

Source: National Accounts (UBOS)

Appendix 5 Table 6: Gross Value Added of Tourism Industries (GVATI) by Industry, Growth rates (percent), Uganda: 2019-2023

Products	2019	2022	2023
1. Accommodation services		-12.9%	13.1%
2. Food- and beverage-serving services		10.1%	15.2%
3. Air and road passenger transport services		21.3%	10.4%
4. Water passenger transport services		106.2%	55.2%
5. Transport equipment rental services		50.0%	5.1%
6. Travel agencies and other reservation services		41.7%	24.0%
7. Cultural services		5.2%	30.4%
8. Sports and recreational services		-24.0%	25.2%
9. Others		10.2%	-5.4%
Total Gross Value Added of Tourism Industries (GVATI)		5.8%	13.3%

Source: National Accounts (UBOS)

Appendix 5 Table 7: Gross Value Added in Tourism Industries (from TSA Table 5) 2019-2023

	Unit	2019	2022	2023	%Change
GVA in tourism industries (GVATI)	US\$ Mn	1,701	1,774	1,975	11.3%
GVA in tourism industries (GVATI)	UGX Bn	6,233	6,592	7,471	12.6%

Source: National Accounts (UBOS)

APPENDIX 6: Tourism Reconciliations of demand and supply (TSA Table 6)

Appendix 6 Table 1: Key TSA Indicators 2019 - 2023

		Unit	2019	2022	2023	%Change
GDP	Tourism Direct GDP as % of total GDP	Percent	3.6	2.5	3.2	25.9%
	Total Gross Domestic Product (GDP)	UGX Mn	139,919,538	178,009,659	190,379,148	6.9%
	Tourism Direct GDP	UGX Mn	5,093,149	4,502,331	6,061,236	34.6%
GVA*	Tourism Direct GVA as % of total GVA	Percent	3.7	2.6	3.2	26.4%
	Total Gross Value Added (GVA)	UGX Mn	129,861,604	164,880,475	175,897,009	6.7%
	Tourism Direct GVA	UGX Mn	4,828,985	4,221,326	5,691,732	34.8%

Source: National accounts, UBOS

Appendix 6 Table 2: Tourism Direct Gross valued Added (TDGVA) and Gross Domestic Product (GDP) at Current Prices, 2019-2023

Year	TDGVA (UGX billions)	Growth rate	GDP (UGX billions)	Growth Rate	Share of TDGVA to GDP (In percent)
2019	4,829.0		139,919.5		3.5%
2022	4,221.3	-12.6%	178,009.7	27.2%	2.4%
2023	5,691.7	39.8%	190,379.1	6.9%	3.0%

Source: National accounts, UBOS

Appendix 6 Table 3: Tourism Direct Gross Domestic Product (TDGDP) and Gross Domestic Product (GDP) at Current Prices, 2019-2023

Year	TDGVA (UGX billions)	Growth rate	GDP (UGX billions)	Growth Rate	Share of TDGVA to GDP (In percent)
2019	5,093.1		139,919.5		3.6%
2022	4,502.0	-14.8%	178,009.7	27.2%	2.5%
2023	6,061.2	39.6%	190,379.1	6.9%	3.2%

Source: National accounts, UBOS

Appendix 6 Table 4: Inbound Tourism Expenditure and Exports (at current prices), 2019-2023

Year	Inbound Tourism Expenditure (UGX billions)	Growth rate	Exports (UGX billions)	Growth Rate	Share of Inbound Tourism Expenditure to Exports (In percent)
2019	4,580		22,860		20.0%
2022	2,572	-43.9%	19,692	-13.9%	13.1%
2023	3,818.6	48.5%	24,239.1	23.1%	15.8%

Source: TEMS 2023 and National accounts, UBOS

Appendix 6 Table 5: Inbound Tourism Expenditure and Exports (at current prices), 2019-2023

Year	Inbound Tourism Expenditure (UGX billions)	Growth rate	Exports (UGX billions)	Growth Rate	Share of Inbound Tourism Expenditure to Exports (In percent)
2019	4,580		22,860		20.0%
2022	2,572	-43.9%	19,692	-13.9%	13.1%
2023	3,818.6	48.5%	24,239.1	23.1%	15.8%

Source: TEMS 2023 and National accounts, UBOS

Appendix 6 Table 6: Domestic Tourism Expenditure and Household Final Consumption Expenditure (HFCE) (at current prices), 2019-2023

Year	Domestic Tourism Expenditure (UGX billions)	Growth rate	Household Final Consumption Expenditure (HFCE) (UGX billions)	Growth Rate	Share of Domestic Tourism Expenditure to HFCE (In percent)
2019	2,965.9		93,568.27		3.2%
2022	3,675.2	23.9%	119,281.02	27.5%	3.1%
2023	5,090.7	38.5%	128,520.7	7.7%	4.0%

Source: National accounts, UBOS

Appendix 6 Table 7: Internal Tourism Expenditure and Household Final Consumption Expenditure (HFCE) and Exports (at current prices), 2019-2023

Year	Internal Tourism Expenditure (UGX billions)	Growth Rate	HFCE and Exports (UGX billions)	Growth Rate	Share of Internal Tourism Expenditure to HFCE and Exports (In percent)
2019	7,546.3		116,428.4		6.5%
2022	6,246.7	-17.2%	138,973.5	19.4%	4.5%
2023	8,909.4	42.6%	152,759.8	9.9%	6.0%

Source: National accounts, UBOS

Appendix 6 Table 8: Internal Tourism Consumption and Household Final Consumption Expenditure (HFCE) and Exports (at current prices), 2019-2023

Year	Internal Tourism Consumption (UGX billions)	Growth Rate	HFCE and Exports (UGX billions)	Growth Rate	Share of Internal Tourism Expenditure to HFCE & Exports (In percent)
2019	7,996.9		116,428.4		6.9%
2022	6,668.2	-16.6%	138,973.5	19.4%	4.8%
2023	9,157.1	37.3%	152,759.8	9.9%	6.0%

Source: National accounts, UBOS

Appendix 6 Table 9: Domestic Tourism Expenditure and Household Final Consumption Expenditure (HFCE) (at current prices), 2019-2023

Year	Domestic Tourism Expenditure (UGX billions)	Growth Rate	Household Final Consumption Expenditure (HFCE) (UGX billions)	Growth Rate	Share of Domestic Tourism Expenditure to HFCE (In percent)
2019	2,966		93,568		3.2%
2022	3,675	23.9%	119,281	27.5%	3.1%
2023	5,091	38.5%	128,520.7	7.7%	4.0%

Source: National accounts, UBOS

Appendix 6 Table 10: Internal Tourism Expenditure and Household Final Consumption Expenditure (HFCE) and Exports (at current prices), 2019-2023

Year	Internal Tourism Expenditure (UGX billions)	Growth Rate	HFCE and Exports (UGX billions)	Growth Rate	Share of Internal Tourism Expenditure to HFCE and Exports (In percent)
2019	7,546		116,428		6.5%
2022	6,247	-17.2%	138,974	19.4%	4.5%
2023	8,909	42.6%	152,760	9.9%	5.8%

Source: National accounts, UBOS

Appendix 6 Table 11: Internal Tourism Consumption and Household Final Consumption Expenditure (HFCE) and Exports (at current prices), 2019-2023

Year	Internal Tourism Consumption (UGX billions)	Growth Rate	HFCE and Exports (UGX billions)	Growth Rate	Share of Internal Tourism Expenditure to HFCE & Exports (In percent)
2019	7,997		116,428		6.9%
2022	6,668	-16.6%	138,974	19.4%	4.8%
2023	9,157	37.3%	152,760	9.9%	6.0%

Source: National accounts, UBOS

Appendix 6 Table 12: Tourism Direct Gross Value Added (TDGVA) by Product at Current Prices, Uganda: 2019-2023

Products	2019	2022	2023
1. Accommodation services	1,534	976	1,506
2. Food- and beverage-serving services	1,030	840	1,149
3. Railway passenger transport services	-	-	-
4. Air & Road passenger transport services	1,482	1,683	2,166
5. Water passenger transport services	9	4	70
6. Air passenger transport services	-	-	-
7. Transport equipment rental services	24	53	54
8. Travel agencies and other reservation services	66	79	173
9. Cultural services	151	109	170
10. Sports and recreational services	63	72	82
11. Other Consumption Products retail	10	-	80
12. Other industries	462	406	240
TOTAL DIRECT GROSS VALUE ADDED (TDGVA)	4,829	4,221	5,692

Source: National accounts, UBOS

Appendix 6 Table 13: Tourism Direct Gross Value Added (TDGVA) by Product at Current Prices, Percent share to Total (in percent) Uganda: 2019-2023

Products	2019	2022	2023
1. Accommodation services	31.8%	23.1%	26.5%
2. Food- and beverage-serving services	21.3%	19.9%	20.2%
3. Railway passenger transport services	-	-	-
4. Air & Road passenger transport services	30.7%	39.9%	38.1%
5. Water passenger transport services	0.2%	0.1%	1.2%
6. Air passenger transport services	-	-	-
7. Transport equipment rental services	0.5%	1.2%	1.0%
8. Travel agencies and other reservation services	1.4%	1.9%	3.0%
9. Cultural services	3.1%	2.6%	3.0%
10. Sports and recreational services	1.3%	1.7%	1.4%
11. Other Consumption Products retail	0.2%	0.0%	1.4%
12. Other industries	9.6%	9.6%	4.2%
TOTAL DIRECT GROSS VALUE ADDED (TDGVA)	100.0%	100.0%	100.0%

Source: National accounts, UBOS

Appendix 6 Table 14: Tourism Direct Gross Value Added (TDGVA) by Product at Current Prices, Growth rates (percent), Uganda: 2019-2023

Products	2019	2022	2022
1. Accommodation services		-36.4%	54.4%
2. Food- and beverage-serving services		-18.5%	36.8%
3. Railway passenger transport services			
4. Air & Road passenger transport services		13.6%	28.7%
5. Water passenger transport services		-58.1%	1842.5%
6. Air passenger transport services			
7. Transport equipment rental services		123.8%	3.1%
8. Travel agencies and other reservation services		20.1%	119.7%
9. Cultural services		-27.6%	55.7%
10. Sports and recreational services		15.2%	14.4%
11. Other Consumption Products retail		-100.0%	
12. Other industries		-12.2%	-40.8%
TOTAL DIRECT GROSS VALUE ADDED (TDGVA)		-12.6%	34.8%

Source: National accounts, UBOS

Appendix 6 Table 15: The Tourism Balance of Payments for Uganda, 2019-2023

Year	Inbound Tourism Expenditure (In UGX)	Outbound Tourism Expenditure (In UGX)	Trade balance with the rest of the world (In UGX)	%Change in Tourism Trade balance (in Percent)
2019	4,580.0	1,666.00	2,914.00	
2022	2,572.0	1,570.00	1,002.00	
2023	3,818.6	1,059.68	2,759.0	

Source: TEMS 2023, Outbound Travel Survey 2023 and National accounts, UBOS

Appendix 6 Table 16: Tourism Direct Gross Value Added (TDGVA) by Product at Current Prices, Uganda: 2019-2023

Tourism Industries	2019	2022	2023
1. Accommodation services	1,533.8	975.5	1,506.4
2. Food- and beverage-serving services	1,030.2	839.9	1,148.7
3. Railway passenger transport services		-	
4. Air & Road passenger transport services	1,481.7	1,683.4	2,166.4
5. Water passenger transport services	8.6	3.6	69.9
6. Air passenger transport services		-	
7. Transport equipment rental services	23.5	52.6	54.2
8. Travel agencies and other reservation services	65.7	78.9	173.4
9. Cultural services	150.9	109.2	170.1
10. Sports and recreational services	62.6	72.1	82.5
11. Other Consumption Products retail	9.7	-	79.7
12. Other industries	462.3	406.1	240.4
Total	4,829.0	4,221.3	5,691.7

Source: National accounts, UBOS

Appendix 6 Table 17: Tourism Direct Gross Value Added (TDGVA) by Product at Current Prices, Percent share to Total (in percent) Uganda: 2019-2023

Tourism Industries	2019	2022	2023
1. Accommodation services	31.8%	23.1%	26.5%
2. Food- and beverage-serving services	21.3%	19.9%	20.2%
3. Railway passenger transport services			
4. Air & Road passenger transport services	30.7%	39.9%	38.1%
5. Water passenger transport services	0.2%	0.1%	1.2%
6. Air passenger transport services			
7. Transport equipment rental services	0.5%	1.2%	1.0%
8. Travel agencies and other reservation services	1.4%	1.9%	3.0%
9. Cultural services	3.1%	2.6%	3.0%
10. Sports and recreational services	1.3%	1.7%	1.4%
11. Others	0.2%		1.4%
12. Retail trade	9.6%	9.6%	4.2%
Total	100%	100%	100%

Source: National accounts, UBOS

Appendix 6 Table 18: Tourism Direct Gross Value Added (TDGVA) by Product at Current Prices, Growth rates (percent), Uganda: 2019-2023

Tourism Industries	2019	2022	2023
Accommodation services		-36.4%	54.4%
Food- and beverage-serving services		-18.5%	36.8%
Railway passenger transport services			
Air & Road passenger transport services		13.6%	28.7%
Water passenger transport services		-57.9%	1842.5%
Air passenger transport services			
Transport equipment rental services		123.8%	3.1%
Travel agencies and other reservation services		20.1%	119.7%
Cultural services		-27.6%	55.7%
Sports and recreational services		15.1%	14.4%
Others			
Retail trade		-12.1%	-40.8%
Total		-12.6%	34.8%

Source: National accounts, UBOS

Appendix 6 Table 19: The Tourism Balance of Payments for Uganda, 2019-2023

Year	Inbound Tourism Expenditure (In UGX)	Outbound Tourism Expenditure (In UGX)	Trade balance with the rest of the world (In UGX)	%Change in Tourism Trade balance (in Percent)
2019	4,580.4	1,666.3	2,914.1	
2022	2,571.5	1,570.5	1,001.1	-65.6%
2023	4,066.4	1,059.7	3,006.7	79.8%

Source: TEMS 2022, Outbound Travel Survey 2022 and National accounts, UBOS

Appendix 6 Table 20: Tourism direct gross value added and tourism direct gross domestic product at Current prices, 2019-2023

	2019	2022	2023
Total supply of goods and services	199,623	249,636	269,836
Less imports of goods and services	25,477	41,310	42,587
Less net taxes (taxes less subsidies) on products	10,058	13,129	14,482
Equals total domestic supply of goods and services (output)	235,158	304,075	326,905
Less intermediate consumption	69,761	84,756	93,939
Gross value added of the economy	129,862	164,880	175,897
Total tourism output	7,713	6,391	9,157
Less total tourism intermediate consumption	2,884	2,170	3,465
Equals tourism direct gross value added (TDGVA)	4,829	4,221	5,692
TDGVA (% of GVA)	3.72%	2.56%	3.2%
Tourism direct gross value added	4,829	4,221	5,692
Plus tourism share of net taxes on products	264	281	370
Equals tourism direct gross domestic product (TDGDP)	5,093	4,502	6,061
TDGDP (% of GDP)	3.64%	2.53%	3.2%

Source: National accounts, UBOS

Appendix 6 Table 21: Direct Tourism Value added 2019 - 2023

	2019	2022	2023	%Change
	Millions (UGX)	Millions (UGX)	Millions (UGX)	
Published GDP	139,919.5	178,009.7	190,379.1	6.9%
Less GST, Import duties and other taxes on production	35,535	54,439	57,069	4.8%
Gives Contribution to GDP from Production	104,385.0	123,570.8	133,310.1	7.9%
Tourism output of tourism characteristic industries	7,713	6,391	9,157	43.3%
Less tourism intermediate consumption of tourism characteristics industries	2,884	2,170	3,465	59.7%
Gives direct tourism value added of tourism characteristics industries	4,829	4,221	5,692	34.9%
Plus direct tourism taxes	264	281	369.5	31.5%
Gives direct tourism value added of all other industries	5,093	4,502	6,062	34.6%
Gives total direct tourism value added Percent	5,093	4,502	6,062	34.6%
Direct tourism value added as a percentage of total industry contribution to GDP	3.6%	2.5%	3.2%	0.7%

Source: National accounts, UBOS, EBOBS, BOU

Appendix 6 Table 22: Key TSA Indicators 2019 - 2023

Indicators	2019 (Ugx Billion)	2022 (Ugx Billion)	2023 (Ugx Billion)
Inbound Tourism Expenditure (Tourism Exports)	4,580.40	2,571.53	3,818.6
Outbound Tourism Expenditure (Tourism Imports)	1,666.28	899.03	1,059.68
Tourism Trade Balance with the Rest of the World (Net Export)	2,914.12	1,673	3,007
Domestic Tourism Expenditure	2,965.87	3,675.2	5,090.7
Internal Tourism Expenditure	7,546.27	6,246.77	9,157.14
Other Components of Tourism Consumption	450,650	421.4	-
Internal Tourism Consumption	7,996.92	6,668.20	9,157.14
Total Gross Value Added (GVA)	129,861.60	164,880.47	175,897
Tourism Direct Gross Value Added (TDGVA)	4,828.99	4,221.33	5,691.73
Tourism Direct Gross Value Added (TDGVA) (% Of GVA)	3.72%	2.6%	3.2%
Total Gross Domestic Product (GDP)	139,919.54	178,009.7	190,379.1
Tourism Direct Gross Domestic Product (TDGDP)	5,093.15	4,501.6	6,061.2
Tourism Direct Gross Domestic Product (TDGDP) (% Of GDP)	3.64%	2.5%	3.2%
Total persons employed (millions)	8.63	10.71	11.13
Persons directly engaged in producing goods and services purchased by visitors Thousands)	573.5	610.8	803.7
Persons directly engaged in producing goods and services purchased by visitors (% of total)	6.6%	5.70%	7.2%
Total Gross Fixed Capital Formation (GFCF)-000's	33,849.93	40,963.8	43,421.1
Tourism Direct Gross fixed Capital Formation (TGFCF)-000's	6,444.82	7,505.0	7,458.3
Tourism Direct Gross Fixed Capital Formation (% of GFCF)	19.0%	18.3%	17.2%
Total Collective Consumption	37,480.54	34,967.00	50,729.22
Tourism Collective Consumption (TCC)	903.35	266.69	356.86
Tourism Direct Collective Consumption (% of Total Collective Consumption)	2.41%	0.76%	0.7%

Source: National accounts, UBOS, EBOBS, BOU

Appendix 6 Table 23: Tourism trade balance in 2019 in UGX Billions

	Imports (**)		Exports (**)		Net Exports (**)	
	Total output	Tourism share (in value)	Total output	Tourism share (in value)	Total output	Tourism share (in value)
Tourism specific products	1,473.5	949.0	189.4	4,028.1	-1,284.1	3,079.1
Other non-consumption products (***)	34,807.3	717.3	22,670.7	552.3	-12,136.6	-165.0
Total output	36,280.8	1,666.3	22,860.1	4,580.4	-13,420.7	2,914.1

Source: National accounts, UBOS, EBOBS, BOU

Appendix 6 Table 24: Tourism trade balance in 2022 (Bill Ush)

	Imports (**)		Exports (**)		Net Exports (**)	
	Total output	Tourism share (in value)	Total output	Tourism share (in value)	Total output	Tourism share (in value)
Tourism specific products	2,536.0	1,206.1	355.4	2,368.9	- 2,180.5	1,162.8
Other non-consumption products (***)	38,773.7	364.4	19,337.0	202.6	-19,436.7	-161.8
Total output	41,309.7	1,570.5	19,692.5	2,571.5	- 21,617.2	1,001.1

Source: National accounts, UBOS, EBOBS, BOU

Appendix 6 Table 25: Tourism Contribution to Taxes in UGX Billions, 2019-2023

Year	Tourism Taxes (UGX Million)	Growth rate	Total Taxes in Uganda (UGX Million)	Share of Internal Tourism Taxes to Total Taxes (In percent)
2019	264.2		10,057.9	2.6%
2022	281.0	6.4%	13,129.2	2.1%
2023	369,503.73	38.0%	14,482,138.84	2.6%

Source: National accounts, UBOS

Appendix 6 Table 26: Percentage contribution to Gross Domestic Product (GDP) 2019 - 2023

	2019	Share (%)	2022	Share (%)	2023	Share (%)
GDP at market prices (Bill Shillings)	139,920	100.0%	178,010	100.0%	190,379	100%
Agriculture, forestry and fishing	32,979	23.6%	44,682	25.1%	44,788	23.5%
Cash crops	2,772	2.0%	4,850	2.7%	4,899	2.6%
Food crops	16,231	11.6%	21,538	12.1%	21,347	11.2%
Livestock	5,049	3.6%	7,476	4.2%	8,117	4.3%
Agriculture Support Services	20	0.0%	23	0.0%	23	0.0%
Forestry	5,587	4.0%	7,021	3.9%	6,812	3.6%
Fishing	3,320	2.4%	3,773	2.1%	3,591	1.9%
Industry	36,779	26.3%	46,446	26.1%	50,000	26.3%
Mining & quarrying	2,310	1.7%	2,943	1.7%	4,493	2.4%
Manufacturing	21,656	15.5%	28,150	15.8%	28,664	15.1%
Electricity	1,873	1.3%	2,154	1.2%	2,256	1.2%
Water	3,111	2.2%	3,757	2.1%	4,223	2.2%
Construction	7,829	5.6%	9,442	5.3%	10,363	5.4%
Services	60,104	43.0%	73,752	41.4%	81,109	42.6%
Trade and Repairs	11,943	8.5%	15,387	8.6%	18,274	9.6%
Transportation and Storage	4,797	3.4%	5,948	3.3%	6,706	3.5%
Accommodation and Food Service Activities	3,850	2.8%	3,813	2.1%	4,354	2.3%
Information and Communication	2,553	1.8%	2,803	1.6%	3,214	1.7%
Financial and Insurance Activities	3,748	2.7%	4,886	2.7%	5,285	2.8%
Real Estate Activities	8,863	6.3%	10,843	6.1%	11,467	6.0%
Professional, Scientific and Technical Activities	2,911	2.1%	3,726	2.1%	4,141	2.2%
Administrative and Support Service Activities	2,556	1.8%	3,482	2.0%	3,795	2.0%
Public Administration	3,668	2.6%	5,035	2.8%	5,129	2.7%
Education	5,963	4.3%	6,405	3.6%	7,270	3.8%
Human Health and Social Work Activities	4,546	3.2%	6,278	3.5%	6,023	3.2%
Arts, Entertainment and Recreation	258	0.2%	250	0.1%	321	0.2%
Other Service Activities	3,388	2.4%	3,642	2.0%	3,773	2.0%
Activities of Households as Employers	1,059	0.8%	1,255	0.7%	1,356	0.7%
Taxes on products	10,058	7.2%	13,129	7.4%	14,482	7.6%
Tourism	5,093	3.64%	4,502	2.53%	6,061	3.18%

Source: National accounts, UBOS

APPENDIX 7: Employment in Tourism (TSA Table 7)

Appendix 7 Table 1: Employment in Tourism industries: 2019-2023

Number of employees by tourism industries	All tourism			Direct tourism		
	2019	2022	2023	2019	2022	2023
Total	720,652	1,032,782	1,145,509	573,508	610,806	803,691
Accommodation services for visitors	11,631	44,711	31,677	8,425	21,474	23,251
Food and beverage serving activities	262,113	387,647	494,374	189,874	133,194	214,558
Passenger transportation*	413,384	525,979	559,239	351,812	419,400	520,092
Travel agencies and other reservation services activities	4,005	8,411	4,007	2,374	4,436	3,747
Other tourism industries*	29,519	66,033	56,212	21,022	32,302	42,043
Status in employment						
Employees ('000)	277,075	347,714	499,434	223,514	216,803	387,314
Self-employed ('000)	443,577	685,067	646,074	349,994	394,003	416,377
Percentage contribution to total employment	8.3%	9.6%	10.3%	6.6%	5.7%	7.2%

Source: Uganda National Household Survey, UNHS 2023/24

Appendix 7 Table 2: Total Employment and Employment in Tourism Industries, Uganda: 2019-2023 (in thousand persons)

Total employment in Uganda	2019	2022	2023
Tourism characteristic industries			
Accommodation services for visitors	8,425	21,474	23,251
Food and beverage serving activities	189,874	133,194	214,558
Passenger transportation*	351,812	419,400	520,092
Travel agencies and other reservation services activities	2,374	4,436	3,747
Other tourism industries*	21,022	32,302	42,043
Total	573,508	610,806	803,691

Source: Uganda National Household Survey, UNHS 2023/24

Appendix 7 Table 3: Total Employment and Employment in Tourism Industries, Percent, Uganda: 2019-2022 (in percent)

Total employment in Uganda	2019	2022	2023
Tourism characteristic industries			
Accommodation services for visitors	1.5%	3.5%	2.9%
Food and beverage serving activities	33.1%	21.8%	26.7%
Passenger transportation*	61.3%	68.7%	64.7%
Travel agencies and other reservation services activities	0.4%	0.7%	0.5%
Other tourism industries*	3.7%	5.3%	5.2%
Total	100%	100%	100%

Source: National Labour Force Survey, 2021

Appendix 7 Table 4: Total Employment and Employment in Tourism Industries, Growth Rates, Uganda: 2019-2023 (in percent)

Total employment in Uganda	2019	2022	2023
Tourism characteristic industries			
Accommodation services for visitors		154.9%	8.3%
Food and beverage serving activities		-29.9%	61.1%
Passenger transportation*		19.2%	24.0%
Travel agencies and other reservation services activities		86.9%	-15.5%
Other tourism industries*		53.7%	30.2%
Total		6.5%	31.6%

Source: Uganda National Household Survey, UNHS 2023/24

Appendix 7 Table 5: Employment of Tourism Industries and Total Employment, 2019-2023

Year	Total Employment	Growth rate	Total Employment	Growth Rate	Share of Tourism Employment to Total Employment (In percent)
2019	573,508		8,631,911		6.6%
2022	610,806	6.5%	10,712,787	24.1%	5.7%
2023	803,691	31.6%	11,134,917	3.9%	7.2%

Source: Uganda National Household Survey, UNHS 2023/24

Appendix 7 Table 6: Total Employment and Employment in Tourism Industries, Percent Shares, Uganda: 2019-2023

	Percent share		
	2019	2022	2023
Share of Employment in Tourism industries to Total Employment	6.6%	5.7%	7.2%

Source: Uganda National Household Survey, UNHS 2023/24

Appendix 7 Table 7: Total Employment of Tourism Industries and Total Employment, 2019-2023

Year	Tourism Employment	Growth Rate	Total Employment	Growth Rate	Share of Tourism Employment to Total Employment (Percent)
2019	720,652		8,631,911		8.3%
2022	1,032,782	43.3%	10,712,787	24.1%	9.6%
2023	1,145,509	10.9%	11,134,917	3.9%	10.3%

Source: Uganda National Household Survey, UNHS 2023/24

APPENDIX 8: Gross Fixed Capital Formation (TSA Table 8)

Appendix 8 Table 1: Tourism Gross Fixed Capital Formation by Capital Goods, 2019-2023 in UGX Billions

Tourism Industries	2019	2022	2023
Accommodation for visitors	3,172.4	4,239.8	4,479.7
Other non-residential buildings and structures proper to tourism industries	1,094.1	574.1	642.1
Passenger transport equipment for tourism purposes	1,015.4	1,340.3	1,065.3
Other machinery and equipment specialized for the production of tourism characteristic products	1,162.9	1,350.8	1,271.2
Total	6,444.8	7,505.0	7,458.3

Source: National accounts, UBOS

Appendix 8 Table 2: Tourism Gross Fixed Capital Formation by Capital Goods, 2019-2023 (In percent)

Tourism Industries	2019	2022	2023
Accommodation for visitors	49.2%	56.5%	60.1%
Other non-residential buildings and structures proper to tourism industries	17.0%	7.6%	8.6%
Passenger transport equipment for tourism purposes	15.8%	17.9%	14.3%
Other machinery and equipment specialized for the production of tourism characteristic products	18.0%	18.0%	17.0%
Total	100%	100%	100%

Source: National accounts, UBOS

Appendix 8 Table 3: Tourism Gross Fixed Capital Formation by Capital Goods, 2019-2023 in (Growth Rates)

Tourism Industries	2019	2022	2023
Accommodation for visitors		33.6%	5.7%
Other non-residential buildings and structures proper to tourism industries		-47.5%	11.8%
Passenger transport equipment for tourism purposes		32.0%	-20.5%
Other machinery and equipment specialized for the production of tourism characteristic products		16.2%	-5.9%
Total		16.5%	-0.6%

Source: National accounts, UBOS

Appendix 8 Table 4: Tourism Gross Fixed Capital Formation and Gross Fixed Capital Formation (GFCF), 2019-2023

Year	Tourism Gross Fixed Capital Formation (TGFCF) in UGX Millions	Growth rate	Gross Fixed Capital Formation (GFCF) in UGX Millions	Growth Rate	Share of Tourism Gross Fixed Capital Formation (TGFCF) to Gross Fixed Capital Formation (GFCF) (In percent)
2019	6,444.8		33,850		19.0%
2022	7,505.0	16.5%	40,964	21.0%	18.3%
2023	7,458.3	-0.6%	43,421.07	6.0%	17.2%

Source: National accounts, UBOS

APPENDIX 9: Tourism Collective Consumption (TSA Table 9)

Appendix 9 Table 1: Description of Table 9 on Tourism Collective Consumption

Field	Budget Items
Tourism Promotion services	<ul style="list-style-type: none"> Tourism promotion and marketing Advertising and public relations Workshops and seminars Hire of venues Travel inland Travel abroad Freight and transport hire
Visitor Information Services	<ul style="list-style-type: none"> Periodicals, Books, and newspapers
Public Administration services related to the distributive and catering trades, hotels, and restaurants	<ul style="list-style-type: none"> Quality control (inspection, registration, and classification)
Public Administration services related to tourism affairs	<ul style="list-style-type: none"> Machinery and Equipment such as motor vehicles, ICT equipment, furniture etc. Wages i.e., salaries, gratuity, allowances etc. Office maintenance such as cleaning and sanitation. Support amenities such as water, electricity. Rent Printing and stationery Transfers to other government units Contributions to autonomous institutions. Support to wildlife associations Policies, strategies, and monitoring services.
Market research and public opinion polling services.	<ul style="list-style-type: none"> Tourism research and development Feasibility studies Short term and long-term consultancies
Police and fire protection services	<ul style="list-style-type: none"> Guard and security services
Other education and training services n.e.c	<ul style="list-style-type: none"> Staff training Scholarships
Education support services	<ul style="list-style-type: none"> Support to tourism training institutes such as UHTTI

Source: TSA Committee Estimates, 2023 and various Government Reports

Appendix 9 Table 2: Tourism Collective Consumption by Consumption products, 2019-2023 (UGX Billions)

Tourism Industries	2019	2022	2023
85561 Tourism promotion services (Ushs Bn)	188.2	170.6	245.9
91136 Public administrative services related to tourism affairs (Ushs Bn)	705.6	83.3	93.7
83700 Market research and public opinion poll-	1.2	0.3	0.3
91260 Police and fire protection services	3.1	3.6	3.7
92920 Educational support services (Ushs Bn)	5.3	8.9	13.2
TOTAL COLLECTIVE CONSUMPTION TOURISM	903.4	266.7	356.9

Source: TSA Committee Estimates, 2023 and various Government Reports

Appendix 9 Table 3: Tourism Collective Consumption by Consumption products, 2019-2023 (In percent)

Tourism Industries	2019	2022	2023
85561 Tourism promotion services (Ushs Bn)	20.8%	64.0%	68.9%
91136 Public administrative services related to tourism affairs (Ushs Bn)	78.1%	31.2%	26.3%
83700 Market research and public opinion poll-	0.1%	0.1%	0.1%
91260 Police and fire protection services	0.3%	1.4%	1.0%
92920 Educational support services (Ushs Bn)	0.6%	3.3%	3.7%
TOTAL COLLECTIVE CONSUMPTION TOURISM	100%	100%	100%

Source: TSA Committee Estimates, 2023 and various Government Reports

Appendix 9 Table 4: Tourism Collective Consumption by Consumption products, 2019-2023 (In Growth Rates)

Tourism Industries	2019	2022	2023
85561 Tourism promotion services (Ushs Bn)		-9.4%	44.2%
91136 Public administrative services related to tourism affairs (Ushs Bn)		-88.2%	12.5%
83700 Market research and public opinion poll-		-74.0%	0.0%
91260 Police and fire protection services		18.0%	2.6%
92920 Educational support services (Ushs Bn)		68.6%	48.5%
TOTAL COLLECTIVE CONSUMPTION TOURISM		-70.5%	33.8%

Source: TSA Committee Estimates, 2023 and various Government Reports

Appendix 9 Table 5: Tourism Collective Consumption and Government Final Consumption Expenditure (GFCE), 2019-2023

Year	Tourism Collective Consumption (TCC) in UGX Billions	Growth rate	Government Final Consumption Expenditure (GFCE) In Billion UGX	Growth Rate	Share of Tourism Collective Consumption to GFCE (In percent)
2019	903.4		37,480.5		2.41%
2022	266.7	-70.5%	34,967.0	-6.7%	0.76%
2023	356.9	33.8%	50,729.2	45.1%	0.70%

Source: TSA Committee Estimates, 2023 and various Government Reports

APPENDIX 10: Acknowledgment

Special tribute goes to the following for the commitment towards the successful compilation of the Uganda Tourism Satellite Account Report, 2025 for the year 2023.

Table 29: Approval Team

Sn	Name	Designation	Institution
1.	Hon. Tom R. Butime	Honorable Minister for Tourism, Wildlife & Antiquities	Ministry of Tourism, Wildlife & Antiquities
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4.	Ms. Kaudha Aliziki	Director Economic Statistics	Uganda Bureau of Statistics

Table 30: Uganda TSA Technical Committee

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