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UGANDA BUREAU OF STATISTICS AND MINISTRY OF TOURISM WILDLIFE AND ANTIQUITIES



UGANDA TOURISM SATELLITE ACCOUNT REPORT

Measuring the contribution of
tourism to the economy of Uganda



NOVEMBER 2023





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This Publication presents the direct contribution of Tourism to the economy of Uganda for the calendar year 2022.

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FOREWORD

It is with great pleasure that I introduce the Uganda Tourism Satellite Account Report for the year 2022. This report is the second publication and stands as a testament to our promise to ensure availability of data for evidence-based decision making.

The Tourism Satellite Account, a comprehensive statistical framework, has been instrumental in providing us with the data and insights needed to understand the impact of tourism on our nation's economy. This second publication builds upon the success of the first, reflecting the dedication and hard work of our tourism sector stakeholders, including the Uganda Bureau of Statistics, the Ministry of Tourism, Wildlife, and Antiquities, and the countless individuals and organizations that contribute to Uganda's tourism industry.

The Uganda Tourism Satellite Account Report for the year 2022 offers invaluable insights into the dynamic nature of our tourism industry, including its contributions to employment, foreign exchange earnings, and GDP growth. As we continue to navigate the ever-changing landscape of global tourism, it is crucial to have data-driven information at our disposal, enabling us to make informed decisions and policies that will guide our industry to new heights.

I would like to take this opportunity to commend the dedication of all those who have worked tirelessly to compile this report. Their unwavering commitment to the advancement of our tourism sector is nothing short of commendable. The data, analyses, and recommendations contained within this report will serve as a guiding light for our ongoing efforts to promote and market tourism in Uganda.

This second publication of the Uganda Tourism Satellite Account Report is more than just a document; it reflects our collective vision for the future of our nation. It demonstrates that we are resolute in our commitment to promoting tourism as a catalyst for economic growth, employment, and national development while preserving our cultural heritage and natural resources.

In 2022, inbound visitors spent over UGX 2,571.5 billion on tourism services, down by 44 percent from 2019, while domestic tourists spent close to UGX. 3,675.2 billion, a 24 percent improvement from 2019. This TSA also shows that Tourism directly contributed 2.5 percent of Uganda's GDP in 2022. This is a reduction from the 3.6 percent reported in 2019. Tourism also greatly contributes to employment in Uganda, directly contributing over 610,000 jobs in 2022, which accounts for 5.7 percent of total employment in the country.

As we delve into the pages of this report, I encourage all stakeholders, from policymakers and investors to the local communities and tourists themselves, to recognize the significance of our tourism industry and take an active role in nurturing its growth and sustainability.

In conclusion, I would like to express my heartfelt gratitude to all those who have contributed to this report, and I look forward to our continued partnership as we work together to ensure that Uganda's tourism sector flourishes, leaving a legacy for generations to come.



Tom R. Butime, MP

Minister of Tourism, Wildlife and Antiquities
Republic of Uganda

PREFACE

The Tourism Satellite Account (TSA) is an accounting framework adopted by the United Nations (UN) and designed to measure goods and services associated with tourism according to international standards, concepts, classifications, and definitions. The TSA provides stakeholders (governments, entrepreneurs, and citizens) with reliable information which assists them in designing policies and tourism business strategies.

The Uganda Tourism Satellite Accounts (TSAs) for 2022 were constructed in line with the Tourism Satellite Account Recommended Methodological Framework (TSA: RMF 2008) of the United Nations World Tourism Organization (UNWTO). This methodology analyses tourism and its relationship to the rest of the economy within the central framework of National Accounting (System of National Accounts (SNA2008). In this way, tourism's contribution to national accounts aggregates can be determined and compared with other industries.

The TSA provides an internationally recognized and standardized method of assessing the scale of tourism-related production and its links across different sectors. The Accounts provide a comprehensive database that identifies the role of tourism in the economy. A clearer picture of tourism's performance within the economy and the benefits the industry offers can be evaluated. Such information is necessary for efficient and effective policy decisions that can guide future development of the industry.

The "tourism industry" is identified from the demand side by measuring the demand for various commodities. This makes it possible to form a link to the supply side of the industry through identification of tourism commodities. The industries which are characteristic of or connected to tourism are then identified through their relative dependence on tourism generated demand.

The Uganda Bureau of Statistics together with the Ministry of Tourism, Wildlife and Antiquities would like to appreciate all Ministries Departments and Agencies (MDAs) that supported the compilation of this TSA. My sincere gratitude goes to the World Bank specifically the Competitiveness and Enterprise Development Project which provided financial support during its compilation. In a special way, I wish to thank the technical working committee that consolidated this report. The Bureau welcomes constructive comments from stakeholders that aim at strengthening the systems for data production and development for this product.



Chris. N. Mukiza (PhD)

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The successful completion of the Uganda Tourism Satellite Account Report for the year 2022 was only successfully completed due to the diligent work and dedication by the various individuals and institutions that formed the Tourism Satellite Accounts Technical Committee.

We extend our heartfelt gratitude to the Competitiveness and Enterprise Development project, World Bank (CEDP), for their invaluable financial support in the development of our Tourism Satellite Account for the calendar year 2022.

A special appreciation goes to our dedicated Permanent Secretary at the Ministry of Tourism, Wildlife and Antiquities whose leadership has been instrumental in guiding this endeavour. We would also like to express our sincere appreciation to the Heads and Technical Officers of the various institutions that actively participated in and steered this undertaking.

A special nod of gratitude goes to Dr. Chris. N. Mukiza, the Executive Director of the Uganda Bureau of Statistics, as well as the technical officers from Uganda Bureau of Statistics (UBOS), Bank of Uganda, Uganda Tourism Board (UTB), National Planning Authority (NPA), Uganda Wildlife Authority (UWA), Uganda Investment Authority (UIA), Ministry of Internal Affairs, Uganda Revenue Authority, Uganda Tourism Association (UTA), the Academia, and the entire Tourism Private Sector fraternity.

Furthermore, this report has greatly benefited from the assistance and advice of many colleagues, including Ms. Aliziki Lubega Kaudha (Director of Economic Statistics, UBOS), Mr. Ajer Basil, Director Tourism, Wildlife & Antiquities, Manga I. Lyadda (Assistant Commissioner, MTWA), Mr. Ojok Denis Rodney (Senior Statistician, MTWA), Ms. Hilda Arinaitwe (UBOS), Mr. Roland Muhumuza (UBOS), Mr. Hakim W. Kizito (MTWA), Ms Nabukwasi Dorcus (UBOS), Mr Rutaro Thomas (UBOS) and Ms. Nansubuga Victoria (Statistician).

We also extend our particular thanks to Mr. John Marie Kiwalabye, Project Coordinator at the World Bank, whose support was invaluable throughout the process.

Finally, we express our profound gratitude for the generous financial support provided by the Competitiveness and Enterprise Development project (CEDP) of the World Bank. Your support has been indispensable in the realization of this project.

GLOSSARY OF TERMS

Basic Price

The basic price is the amount receivable by the producer from the purchaser for a unit of a good or service produced as output minus any tax payable, and plus any subsidy receivable, on that unit because of its production or sale; it excludes any transport charges invoiced separately by the producer.

Direct employment in tourism industry

Direct tourism employment is derived by applying the technical ratio (value added of tourism share over value added of whole industry) to the number of people employed in each industry. This approach produces a value for the number of people in each industry because of tourism.

Domestic tourism

Domestic tourism comprises activities of a resident visitor within the country of reference either as part of a domestic tourism trip or part of an outbound tourism trip.

Domestic tourism consumption

Domestic tourism consumption is the tourism consumption of a resident visitor within the economy of reference.

Domestic tourism expenditure

Domestic tourism expenditure is the tourism expenditure of a resident visitor within the economy of reference.

Durable consumer goods

Durable consumer goods are goods that may be used repeatedly or continuously over a period of a year or more, assuming a normal or average rate of physical usage. When acquired by producers, these are capital goods used for production processes, as is the case of vehicles, computers, etc. When acquired by households, they are consumer durable goods.

Excursionist

An excursionist (same day visitor) is a non-resident visitor arriving and leaving the country the same day.

Gross margin

The gross margin of a provider of reservation services is the difference between the value at which the intermediated service is sold and the value accrued to the provider of reservation services for this intermediated service.

Gross Output

Gross Output for the tourism sector includes the value of goods and services produced by tourism industries (tourism output) and imported items purchased by tourists.

Inbound tourism

Inbound tourism comprises the activities of a non-resident visitor within the country of reference.

Inbound tourism consumption

Inbound tourism consumption is the tourism consumption of a non-resident visitor within the economy of reference.

Inbound tourism expenditure

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

Intermediate consumption

Intermediate consumption of industries covers non-durable goods and services used up in the production process. For this TSA, intermediate consumption of industries (providing the product) has been calculated as a percentage of gross output assuming the same ratios of the SUT.

Internal tourism

Internal tourism comprises domestic and inbound tourism.

Internal tourism consumption

Internal tourism consumption is the tourism consumption of both resident and non-resident visitors within the economy of reference. It is the sum of domestic tourism consumption and inbound tourism consumption.

National tourism consumption

National tourism consumption is the tourism consumption of resident visitors, within and outside the economy of reference. It is the sum of domestic tourism consumption and outbound tourism consumption.

Non-monetary indicators

Data measured in physical or other non-monetary units should not be considered a secondary part of a satellite account. They are essential components, both for the information they provide directly and to analyse the monetary data adequately.

Outbound tourism

Outbound tourism covers the activities of a resident visitor outside the country of reference as part of an outbound tourism trip.

Outbound tourism consumption

Outbound tourism consumption is the tourism consumption of a resident visitor outside the economy of reference.

Outbound tourism expenditure

Outbound tourism expenditure is the tourism expenditure of a resident visitor outside the economy of reference.

Production account

The production account records the activity of producing goods and services as defined within the SNA. Its balancing item, gross value added, is defined as the value of output less the value of intermediate consumption and is a measure of the contribution to GDP made by an individual producer, industry, or sector. Gross value added is the source from which the primary incomes of the SNA are generated and is therefore carried forward into the primary distribution of income account. Value added and GDP may also be measured net by deducting consumption of fixed capital, a figure representing the decline in value during the period of the fixed capital used in a production process.

Social transfers in kind

A special case of transfers in kind is that of social transfers in kind. These consist of goods and services provided by general government and Non-Profit Institutions Serving Households (NPISHs) that are delivered to individual households. Health and education services are the prime examples. Rather than provide a specified amount of money to be used to purchase medical and educational services, the services are often provided in kind to make sure that the need for the services is met. (Sometimes the recipient purchases the service and is reimbursed by the insurance or assistance scheme. Such a transaction is still treated as being in kind because the recipient is merely acting as the agent of the insurance scheme)

Taxes on production

Taxes on production are taxes payable out of the value added of producers. This category of taxes includes taxes levied on property, fixed assets and labour employed. Examples are municipal rates, motor vehicle licenses and business licenses.

Taxes on products

Taxes on products are payable on goods and services when they are produced, sold, or used. These include excise duties, import duties and Value Added Taxes (VAT)

Total tourism internal demand

Total tourism internal demand is the sum of internal tourism consumption, tourism gross fixed capital formation and tourism collective consumption. It does not include outbound tourism consumption.

Tourism consumption

Tourism consumption has the same formal definition as tourism expenditure. Nevertheless, the concept of tourism consumption used in the Tourism Satellite Account goes beyond that of tourism expenditure. Besides the amount paid for the acquisition of consumption goods and services, as well as valuables for own use or to give away, for and during tourism trips, which corresponds to monetary transactions (the focus of tourism expenditure), it also includes services associated with vacation accommodation on own account, tourism social transfers in kind and other imputed consumption. These transactions need to be estimated using sources different from information collected directly from the visitors, such as reports on home exchanges, estimations of rents associated with vacation homes, calculations of financial intermediation services indirectly measured (FISIM), etc.

Tourism ratio

For each variable of supply in the Tourism Satellite Account, the tourism ratio is the ratio between the total value of tourism share and total value of the corresponding variable in the Tourism Satellite Account expressed in percentage form.

Tourist

A tourist is defined as a non-resident visitor staying overnight.

The Supply and Use Table (SUT)

The SUT is a core table in the System of National Accounts which presents by product group, the resources and uses of goods and services for the total economy.

Tourism Balance of Trade

Tourism imports comprise goods and services purchased by residents on a trip outside the country whilst tourism exports comprise goods and services purchased by non-residents visitors in the country. The Tourism balance of trade is defined as tourism exports net of tourism imports.

Tourism share

Tourism share is the share of the corresponding fraction of internal tourism consumption in each component of supply. For each industry, the tourism share of output (in value), is the sum of the tourism share corresponding to each product component of its output.

Tourism single-purpose consumer durable goods

Tourism single-purpose consumer durables is a specific category of consumer durable goods that include durable goods that are used exclusively, or almost exclusively, by individuals while on tourism trips.

Valuation

Gross output is valued at basic prices, that is, the amount receivable by the producer exclusive of taxes payable and inclusive of subsidies receivable on the products. Intermediate consumption is at purchaser's price, that is, it includes trade margins of wholesalers and retailers as well as additional transport charges payable by the purchaser and non-deductible VAT.

Visitor

A visitor is a traveller taking a trip to a main destination outside his/her usual environment, for less than a year, for any main purpose (business, leisure, or other personal purpose) other than to be employed by a resident entity in the country or place visited.

ACRONYMS AND ABBREVIATIONS

BOP	Balance of Payments	UNECA	United Nations Economic Commission for Africa
BOU	Bank of Uganda	UNHS	Uganda National Household Survey
CEDP	Competitiveness Enterprise Development Project	UNWTO	United Nations World Tourism Organization
COFOG	Classification of the Functions of Government.	UWA	Uganda Wildlife Authority
GDP	Gross Domestic Product	UWEC	Uganda Wildlife Education Centre
GFCF	Gross Fixed Capital Formation	UWRTI	Uganda Wildlife Research and Training Institute
GVA	Gross Value Added	VFR	Visiting Friends and Relatives
GVATI	Gross Value Added of Tourism Industries	WTTC	World Travel and Tourism Council
GVA_{bp}	Gross Value Added at Basic Prices		
GO_{bp}	Gross Output at Basic Prices		
IC_{pp}	Intermediate Consumption at Purchaser's Price		
HFCE	Household Final Consumption Expenditure		
ILO	International Labour Organization		
ISIC	International Standards Industrial Classification of all Economic Activities		
MAPU	Manpower Survey Uganda		
MICE	Meetings, Incentives, Conferences and Exhibitions		
MoFPED	Ministry of Finance Planning and Economic Development		
MTWA	Ministry of Tourism, Wildlife and Antiquities		
NLFS	National Labour Force Survey		
RMF	Recommended Methodological Framework		
SME	Small and Medium Enterprises		
SNA	System of National Accounts		
SUT	Supply and Use Table		
TDGDP	Tourism Direct Gross Domestic Products		
TDGVA	Tourism Direct Gross Value Added		
TSA	Tourism Satellite Accounts		
UHTTI	Uganda Hotel and Tourism Training Institute		
UNRA	Uganda National Road Authority		
Ushs	Uganda Shillings		
UTA	Uganda Tourism Association		
UTB	Uganda Tourism Board		
UTSA	Uganda Tourism Satellite Account		
UBOS	Uganda Bureau of Statistics		



EXECUTIVE SUMMARY



EXECUTIVE SUMMARY

The Tourism Satellite Account (TSA) is an accounting framework adopted by the 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 2022 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 establishes the direct contribution of Tourism to the economy using the recommended Tourism Satellite Account methodology. The specific goals were to.

- i) Estimate tourism demand and supply,
- ii) Assess value added by tourism activities to the economy,
- iii) Establish the level of employment generated by the tourism activities,
- iv) Measure the gross fixed capital formation by the sector, and
- v) 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 2022 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 2022, National Labour Force Survey, 2021, Bank of Uganda Outbound Travel Survey (2022),

Arrival and Departure Statistics (UBOS) and Macroeconomic aggregates from National Accounts.

In 2022, Uganda received a total of 814,508 international visitors (Inbound Tourism) who stayed for an average of 7.4 nights. In the same year, 2.7 million domestic visitors left their usual places of residence for tourism purposes (Domestic Tourism) and spent at least 5.8 nights. A total of 397,353 Ugandan Residents travelled abroad for a foreign trip (Outbound Tourism) mainly for personal visits such as Holiday and Leisure.

Inbound tourism (Tourism exports) amounted to UGX 2,571.5 billion (TSA Table 1) in 2022 which was lower than the UGX 4,580.4 billion in 2019. Outbound tourism expenditure (Tourism Imports) dropped by 5.7 percent in 2022 from UGX 1,666.3 billion in 2019 to UGX 1,570.5 billion in 2022 (TSA Table 3).

The value of tourism exports exceeded the value of tourism imports resulting into a surplus tourism trade balance with the rest of the world estimated at UGX 1,001.1 billion in 2022. This implies that tourism improved the balance of payments position in 2022 in which the goods and services balance recorded a deficit of UGX 18,794 billion.

In 2022, Domestic tourism expenditure increased by 23.9 percent from 2,965.9 billion recorded in 2019 to UGX 3,675.2 billion in 2022. Ugandan residents were more willing to spend on tourism than during the pre-pandemic years. (TSA Table 2).

Internal tourism expenditure of Uganda was estimated at UGX 6,246.8 billion in 2022, 17.2 percent lower compared with UGX 7,546.3 billion in 2019 (covering both international and domestic tourism expenditure) (TSA Table 4).

The 2022 UTSA report estimates the internal tourism consumption at UGX 6,668.2 billion in 2022, a 16.6 percent (or UGX 1,328.7 billion) reduction from 2019 covering internal tourism expenditure plus other components of tourism consumption amounting to UGX 421.4 billion mainly by inbound tourists. (TSA Table 4).

Domestic Tourism performed well regarding internal tourism spending establishing itself as the main driver to Tourism performance in 2022. While international

tourists contributed only 41 percent in 2022 (against 60.7 percent in 2019), expenditures from domestic tourism accounted for 59 percent of total internal tourism spending in 2022 (against 39.3 percent in 2019).

The total output at basic prices for tourism industries was estimated at UGX 10,695 billion in 2022, which was a 7.1 percent increase compared to UGX 9,989 billion recorded in 2019. This was attributed to the increase in food and beverage serving services output, and air and road passenger transport services. In addition, the Gross Value added for tourism-related industries was estimated at UGX 6,592 billion in 2022 compared to UGX 6,233 billion recorded in 2019, representing a 5.8 percent increase in value added over the period (TSA Table 5).

The Tourism Direct GDP was estimated at UGX 4,502 billion in 2022, down from UGX 5,093 billion recorded in 2019. In terms of contribution, the Tourism Direct GDP dropped from 3.6 percent recorded in 2019 to 2.5 percent registered in 2022 representing a decline of 1.1 percentage points. This was attributed to poor performance in Accommodation service activities over the period. The Tourism Direct Gross Value Added (TDGVA) was estimated at UGX 4,221 billion in 2022 compared to UGX 4,821 billion recorded in 2019, contributing 2.6 percent in 2022 compared to 3.7 percent recorded in 2019 (TSA Table 6).

The tourism contribution to tax revenue was estimated at UGX 280 billion in 2022 compared to UGX 264 billion in 2019, representing a 2.1 percent contribution to total taxes in 2022 compared to 2.6 percent recorded in 2019 (TSA Table 6)

Tourism service export was estimated at UGX 2,572 billion in 2022, down from UGX 4,580 billion recorded in 2019, contributing 39.0 percent to service exports and 11.5 percent to total exports. On the other hand, Tourism service imports was estimated at UGX 1,570 billion in 2022 compared to UGX 1,666 billion recorded in 2019, contributing 13.3 percent to service imports and 3.8 percent to total imports (TSA Table 6).

Net tourism service export earnings were estimated at a surplus of UGX 1,001 billion in 2022 compared to UGX 2,914 billion recorded in 2019. As a result, tourism improved the Goods and services balance of payments despite a deficit of UGX 18,794 billion recorded in 2022 (TSA Table 6).

The Direct employment in tourism grew by 6.5 percent (or 37,298 workers) to 610,806 workers in 2022 compared to 2019 (573,508). Tourism directly accounted for 5.7 percent of total employment. Tourism was the fifth highest employer in the country, after Agriculture, Trade, Manufacturing and Transport and storage. 64.5 percent of workers in tourism are self-employed, while 35.5 percent are employees. Tourism was a male dominated industry, with 79 percent (483,360) of the workers being male, while only 21 percent (127,446 workers) were female. This is like 2019, where 71 percent were male, while 29 percent were female. (TSA Table 7)

The Gross fixed capital formation for Uganda in 2022 was estimated at UGX 40,963 billion of which 18.3 percent was specific to tourism (UGX 7,505 billion). The tourism share dropped by 0.7 percentage points from 19.0 percent recorded in 2019. There was however an increase of 16.5 percent in Tourism specific assets over the three-year period (TSA Table 8)

In 2022, Collective Consumption on tourism by the local, regional, and national governments was estimated at UGX 266.9 billion, 70 percent lower than the UGX 903.35 billion (2.41 percent of TCC) in 2019. The main cause of the decline in Tourism Collective Consumption in 2022 was the reduction in Public administrative services related to tourism affairs which includes government expenditure on infrastructure such as tourism roads, et al. The contribution of Tourism to Collective consumption was estimated at 0.76 percent (TSA Table 9).



INTRODUCTION



CHAPTER 1: INTRODUCTION

1.1 BACKGROUND

Uganda's Tourism Satellite Account (TSA) development process started in 2017 with the formulation of the UTSA technical committee led by the Ministry of Tourism, Wildlife and Antiquities (MTWA) in collaboration with Uganda Bureau of Statistics (UBOS), and support from United Nations Economic Commission for Africa (UNECA). Other stakeholders who were part of this committee included Bank of Uganda, Uganda Revenue Authority, Uganda Tourism Board, Uganda Wildlife Authority, National Planning Authority, Uganda Investment Authority, Makerere University and Uganda Tourism Association.

MTWA and UBOS released the first UTSA report in March 2023 focusing on 2019 as the base year since this was a turning point for Tourism globally due to the impact of the Pandemic but also after addressing the data gaps within the ten TSA tables. A series of surveys were conducted by MTWA, UBOS and BOU. The data was analyzed by the consultant who had been hired through a capacity building project supported by UNECA which comprised of all stakeholders.

The Uganda TSA Report for the calendar year 2022 is the second edition in succession which was produced by the TSA committee supported by the Competitive and Enterprise Development Project (CEDP) of the World Bank. Taking cognizant of already established systems of statistics to track tourism demand in terms of domestic and outbound trips, tourist accommodation and tourist expenditure due to their relevance, they do not measure the overall contribution that tourism makes to the economy. It is upon this basis that Tourism satellite account is developed to comprehensively provide a measure of the contribution of tourism to the economy.

The report construction is grounded on the idea that; it will provide a detailed analysis of all the aspects of demand for goods and services which might be directly associated with the activity of visitors. Secondly, TSA will make it easy to observe the operational interface with the supply of such goods and services within the Economy. That notwithstanding, TSA also ensures there is a proper description of how supply interacts with other economic activities.

1.2 RATIONALE FOR DEVELOPMENT OF THE UGANDA TSA

Tourism is a vital sector for Uganda's economy as highlighted in the third National Development Plan (NDP III), as a key primary growth sector alongside agriculture and mining sectors. To better understand and harness the potential of this sector, Uganda embraced the TSA process, which systematically measures the direct economic contribution of tourism including measuring tourism expenditure, tourism contribution to GDP, tourism employment, and various associated industries.

Tourism cuts across many different industry sectors and cannot be measured in the same way as other parts of the economy. Using an internationally accepted methodology developed by the World Tourism Organization (UNWTO), the second edition of the Uganda TSA for the year 2022 has been developed to estimate the impact of tourism on the Ugandan economy.

This report is an essential tool that provides policymakers, investors, and stakeholders with the data and insights necessary to make informed decisions and support sustainable tourism development.

Thus, this Uganda Tourism Satellite Account Report 2022 plays a pivotal role in furthering the understanding and development of the tourism sector. By providing accurate and updated information, this tool will guide policymakers and stakeholders in making informed decisions for promotion of sustainable tourism growth, economic development, and preservation of the country's rich, natural, and cultural heritage.

1.3 COMPONENTS OF THE TOURISM SATELLITE ACCOUNT

The Tourism Satellite Account (TSA) is the main tool for measurement of direct impact of tourism in the economy based on an internationally agreed framework made up of 10 TSA tables.

The 10 tables are designed to produce accurate and comprehensive data in line with the United Nations World Tourism Organizations recommended methodological Framework as outlined below.

- (i) **TSA Table 1** analyses the components of the demand or consumption made by non-residents in Uganda.
- (ii) **TSA Table 2** examines the expenditure components of domestic visitors, i.e., demand or consumption made by Ugandan residents for tourism purposes within the Ugandan economy. The domestic tourism boundary is strictly confined to the Ugandan residents travelling within Uganda for tourism purposes. This table also includes an estimate of domestic expenditure by residents on an outbound travel such as pre-trip expenses.
- (iii) **TSA Table 3** measures the amount of goods and services consumed by Ugandans outside the country.
- (iv) **TSA Table 4** gives the total Tourism Internal expenditure consisting of all expenditure for tourism purposes by both residents (Domestic tourism expenditure) and non-residents (Inbound tourism expenditure) within the economic territory. The values of outbound tourism expenditure do not feature in internal tourism as these represented economic activities supplied by other countries. However, the domestic tourism expenditure includes an estimate of pre-trip expenditures by outbound tourists. Non-cash transactions occurring within the domestic economy are added to generate internal tourism-consumption aggregates (TSA Table 4).
- (v) **TSA Table 5** is the supply table where the total commodity production by industry is displayed in a matrix form irrespective of who might have consumed the respective products.
- (vi) **TSA Table 6** which is the core table, reconciles internal tourism consumption and domestic supply. This table presents a synthesis of domestic supply for each of the tourism characteristic products confronted by the consumption of visitors for each of the listed products.
- (vii) **TSA Table 7** presents information on employment in the tourism industries.
- (viii) **TSA Table 8** presents information on investments in the tourism Industry.
- (ix) **TSA Table 9** presents information on Tourism Collective Consumption
- (x) **TSA Table 10** presents some important non-monetary indicators associated with tourism.

1.4 THE IMPORTANCE OF TOURISM SATELLITE ACCOUNTS

This Uganda TSA for the year 2022 provides planners, implementers and decision makers across government and private sector with timely and accurate data to facilitate both policy and business strategy designs for tourism as well as supporting evaluation of their efficiency.

The implementation of this TSA is critical for the tourism sector and serves to address the following.

- Track the realization and performance towards achieving the third National Development Plan and other key government strategic plans.
- Enable the generation of tourism economic data (such as Tourism Direct GDP) that is comparable with other economic statistics.
- Identify employment generation in the tourism value chain and the role tourism plays in job creation for different types of workers.
- Provide a standard measure of tourism outputs that can be compared internationally with other countries.
- Develop quantitative estimates of Tourism Value Added and thus, analyze the impact of tourism on the economy.
- Extend the role of tourism in all industries involved in producing the goods and services demanded by visitors.
- Generate and share 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.

- Uganda Supply and Use Table (SUT) 2016/17, (UBOS)
- MTWA Statistical Abstract 2023
- Tourist Expenditure and Motivation Survey (TEMS), (MTWA) 2022
- National Labour Force Survey 2021, (UBOS)
- Uganda National Household Survey 2019/20 (UBOS)
- UBOS Statistical Abstract, 2023
- Annual Tourism Development Programme Performance Report FY 2022/23, (MTWA)
- Quarterly Accommodation Statistics Surveys 2022, (UBOS)
- Arrivals and Departure statistics 2022, (UBOS)
- Quarterly Outbound Survey 2022, (BOU)
- Tourism Sector Statistical Abstract 2022, (MTWA)
- Balance of Payments (BOP) Report 2022, (BOU)
- Midyear Population Projections 2022, (UBOS)
- Consumer Price Index Calendar Year series 2022, (UBOS)
- National Accounts Calendar Year series 2022, (UBOS)
- Budget Annual estimates 2022/23, (MOFPED)
- Approved Estimates of Revenue and Expenditure (Recurrent and Development) FY 2022/23
- UNRA Annual performance report 2022/23
- Fiscal Expenditure Local Government releases, FY 2022/23 (MoFPED)
- Uganda Tourism Association Annual report, 2022.

1.6 METHODOLOGY

The Tourism Satellite Account (TSA) is compiled annually using the step-by-step Uganda TSA compiler's manual 2019 which was developed by the Uganda TSA technical committee and is in line with the Recommended International Methodological Framework, 2008 by United Nations World Tourism Organization and the Systems of National Accounts by the United Nations Statistical Commission.

TOURISM DEMAND

Tourism Demand comprises 4 TSA tables, these present demand-side data on expenditure by visitors (before and during their trips) and tourism consumption. Tourism expenditure is divided into inbound (TSA Table 1), domestic (TSA Table 2) and outbound (TSA Table 3). TSA Table 4 focuses mainly on internal tourism consumption, summarizing inbound and domestic tourism expenditure, but also covering other components of consumption.





A close-up photograph of a lioness resting on a thick, textured tree branch. The lioness's body is light brown and tawny, with its front leg and paw visible on the left side of the frame. The tree bark is rough and greyish-brown. The background is slightly blurred, showing more of the tree and some green foliage.

INBOUND TOURISM DEMAND

CHAPTER 2: TSA TABLE 1: INBOUND TOURISM

2.1 INTRODUCTION

According to the IRTS, 2008, an inbound trip refers to a visitor's travel from the time of arriving in a country to the time of leaving. These visitors are defined as non-residents traveling for less than a year in the country's economic territory of reference, in this case Uganda, for any purpose other than being employed by an entity/ organization in the country.

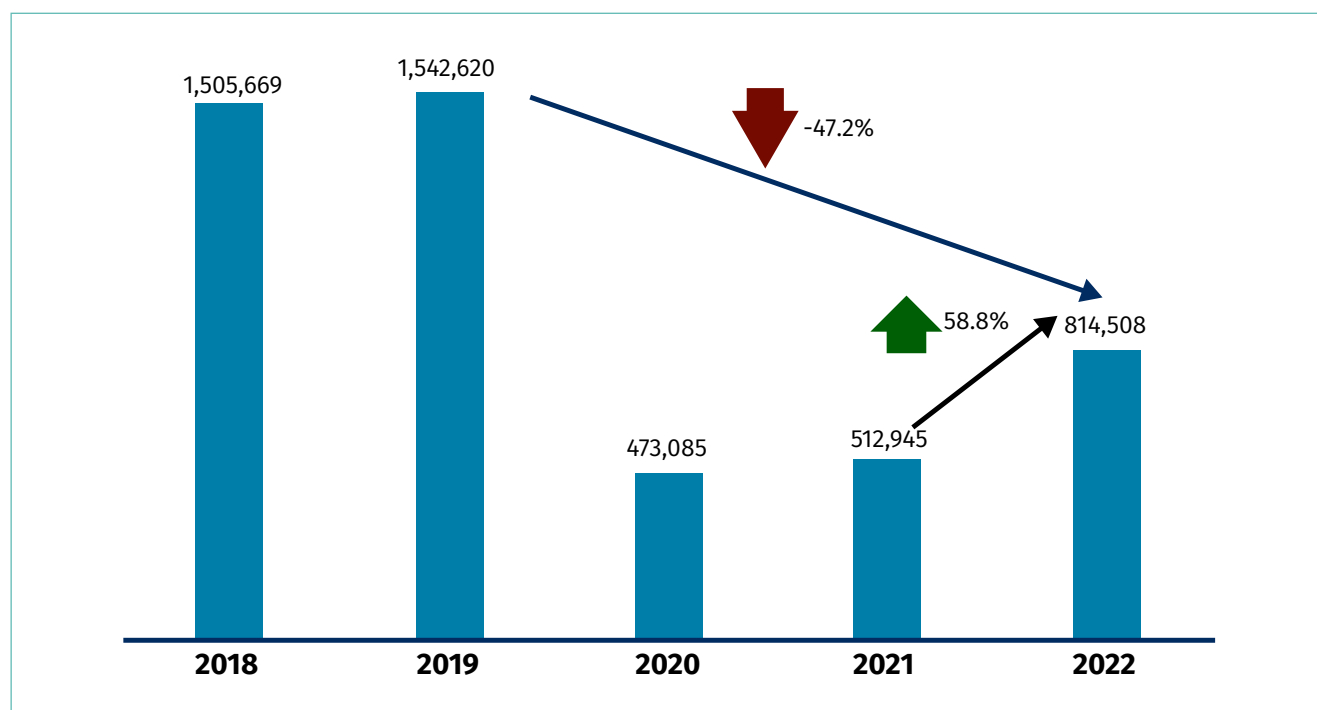
This section presents arrivals of overnight and same day visitors, Length of Stay and Expenditures of inbound visitors within the country in 2022. Total number of Inbound Visitors is an aggregate of the Excursionists (Same Day Visitors) and the Tourists (Overnight Visitors).

2.2 VISITOR ARRIVALS, 2018-2022

A major source of inbound tourism statistics is the Arrival and Departure Statistics (PISCES System) and the Tourist Expenditure and Motivation Survey (MTWA). Visitor Arrivals in 2022 increased by 58.8 percent compared with 2021 but remained 47.2 percent below the 2019 levels.

A total of 814,508 visitors travelled to Uganda in 2022 as shown in Figure 2.1, 1.6 times as many as in 2021. International tourism recovered 52.8 percent of pre-pandemic levels in 2022, with Africa, America, and Asia in the lead. This recovery was largely attributed to the lifting or relaxation of travel restrictions, aggressive marketing and reopening of key tourism source markets for Uganda, encompassing Europe, North America, Asia, China, Japan, and, of course, Africa – which represents the primary source of international tourists arriving in Uganda.

Figure 2.1: Visitor Arrivals to Uganda, 2018-2022



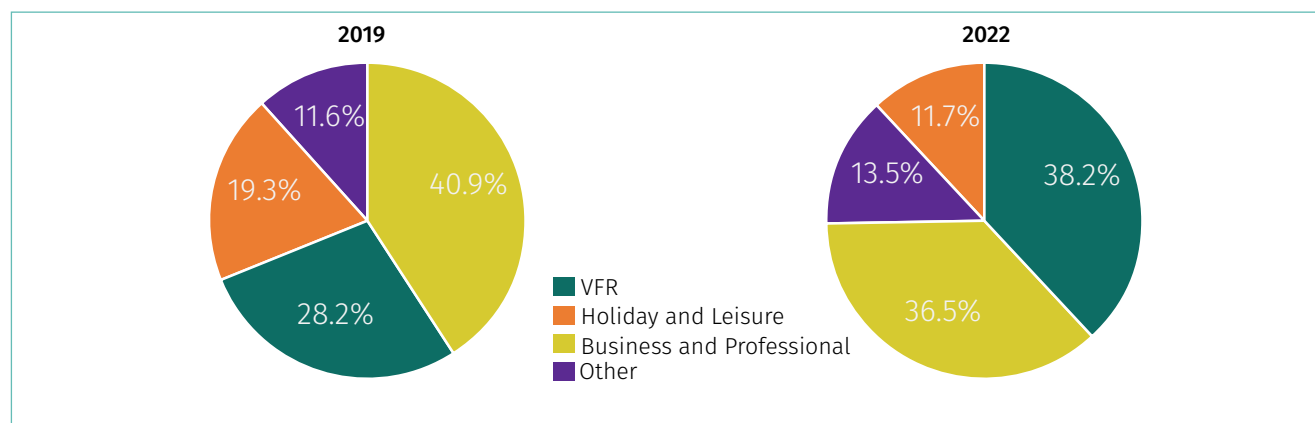
Source: Arrival and Departure Statistics (UBOS), 2022, UBOS Statistical Abstract, 2023, Annual Tourism Development Performance Report FY2022/23, MTWA Tourism Statistical abstract 2023.

Additionally, out of the 814,508 visitor arrivals, 41,683 (7.7%) were Excursionists (non-resident visitors arriving and leaving Uganda the same day) while 772,825 (92.3%) were Tourists (Overnight Visitors).

2.3 VISITOR'S PURPOSE OF VISIT

Reconnecting with Friends & Relatives and doing business were the top two reasons why tourists came to Uganda both in 2019 and 2022, accounting for a combined share of 74.7 percent of the total in 2022. 13.5 percent of Visitors to Uganda came for other reasons while one in ten visitors (11.7%) to Uganda in 2022 did so for Leisure and Holiday.

Figure 2.2: Purpose of Visit of Tourists in Uganda, 2022



Source: Arrival and Departure Statistics (UBOS), 2022, UBOS Statistical Abstract, 2023, Annual Tourism Development Performance Report FY2022/23.

2.4 VISITOR'S LENGTH OF STAY

Tourists to Uganda stayed for an average of 7.4 nights in 2022 compared to 8.3 nights in 2019 with the Leisure and Holiday Visitors staying longer than all visitor types at 10.5 nights. Business tourists stayed for at least a week while those that came to visit their relatives and friends stayed longer than a week on average 9.7 nights.

Table 2.2: Visitor's duration of Stay, 2019/2022

Departure by Air/Road/Purpose of visit	Mean Length of Stay (Nights)		Median	
	2019	2022	2019	2022
Business & Professional	3.0	7.4	2	4
Holidays, Leisure & Recreation	7.6	10.5	6	8
Other	21.3	4.0	7	1
VFR	6.4	9.7	5	6
GRAND TOTAL	8.3	7.4	4	4

Source: Tourism Expenditure and Motivation Survey Report, 2022 (MTWA)

2.5 INBOUND TOURISM EXPENDITURE (TOURISM EXPORTS)

Inbound tourism refers to tourism of non-resident visitors (foreign visitors and nationals permanently residing abroad) spending on Ugandan goods and services within the economic territory of Uganda.

The total inbound expenditure/value of tourism exports in 2022 amounted to UGX 2,571.53 billion, which was lower than the UGX 4,580.40 billion in the year 2019. This represents a 43.9 percent drop in international Tourist Expenditure. (Table 2.3). This is consistent with the 47.2 percent fall in international visitor numbers (overseas arrivals).

The slow re-opening of international borders across the world meant that tourism exports were far lower than the pre-pandemic period (2019).

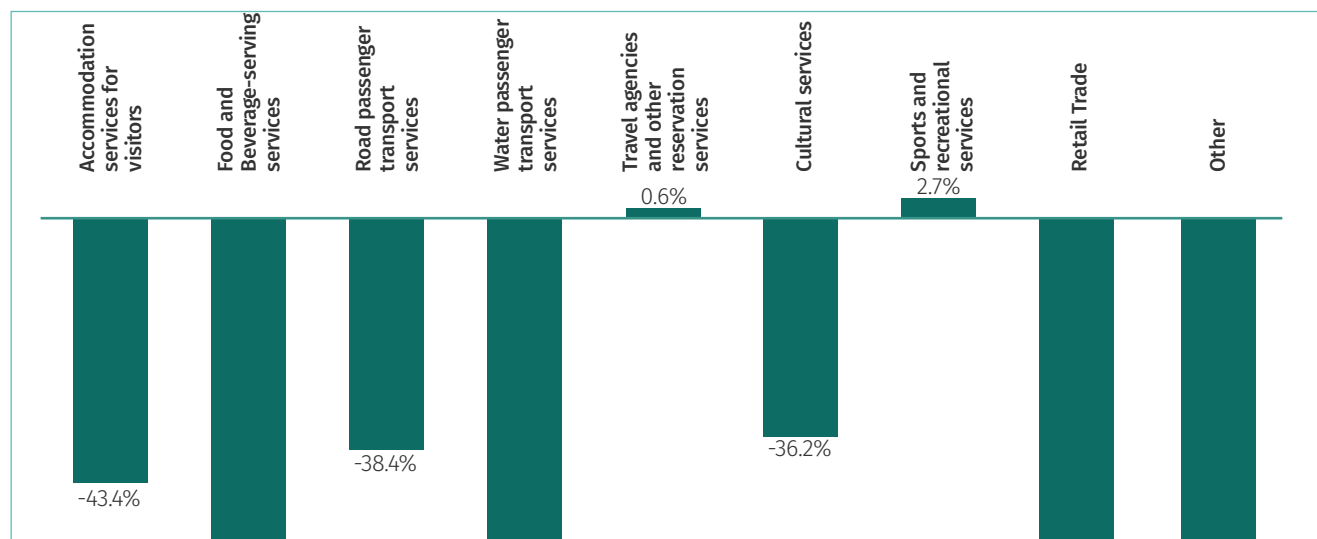
Table 2.3: Inbound Tourism Expenditure by Product, Uganda at Current prices, 2019-2022

CONSUMPTION PRODUCTS (*)	2019 (UGX billion)	2022 (UGX billion)	%Change
A.1. Tourism characteristic products			
1. Accommodation services for visitors	1,786.74	1,011.79	-43.4
2. Food- and beverage-serving services	1,084.17	499.29	-53.9
3. Air & Road passenger transport services	574.47	353.89	-38.4
4. Water passenger transport services	14.54	6.15	-57.7
5. Air passenger transport services	-	-	-
6. Transport equipment rental services		40.11	-
7. Travel agencies and other reservation services	157.93	158.81	0.6
8. Cultural services	269.45	171.84	-36.2
9. Sports and recreational services	123.62	127.02	2.7
A.2. Other consumption products (a)	-	-	
10. Health and Medical Care	-	89.47	-
11. Retail Trade	17.22	7.03	-59.2
B.1. Valuables			
B.2. Other	552.26	106.14	-80.8
TOTAL INBOUND TOURISM EXPENDITURE	4,580.40	2,571.53	-43.9

Source: Tourism Expenditure and Motivation Survey Report, 2022 (MTWA), Arrival and Departure Statistics (UBOS), 2022,

Figure 2.3 shows that all Tourism industries registered a decline in 2022 when compared with 2019 except for the Sports and Recreational services and the Travel Agencies and Reservations services. Among the industries, Expenditure on other miscellaneous services recorded the largest decline of -80.8 percent. This was followed by retail Trade with -59.2 percent and water passenger Transport at -57.7 percent.

Conversely, Sports and recreational services recorded a 2.7 percent increase while Travel Agencies and other reservation services grew by 0.6 percent in 2022 when compared to 2019.

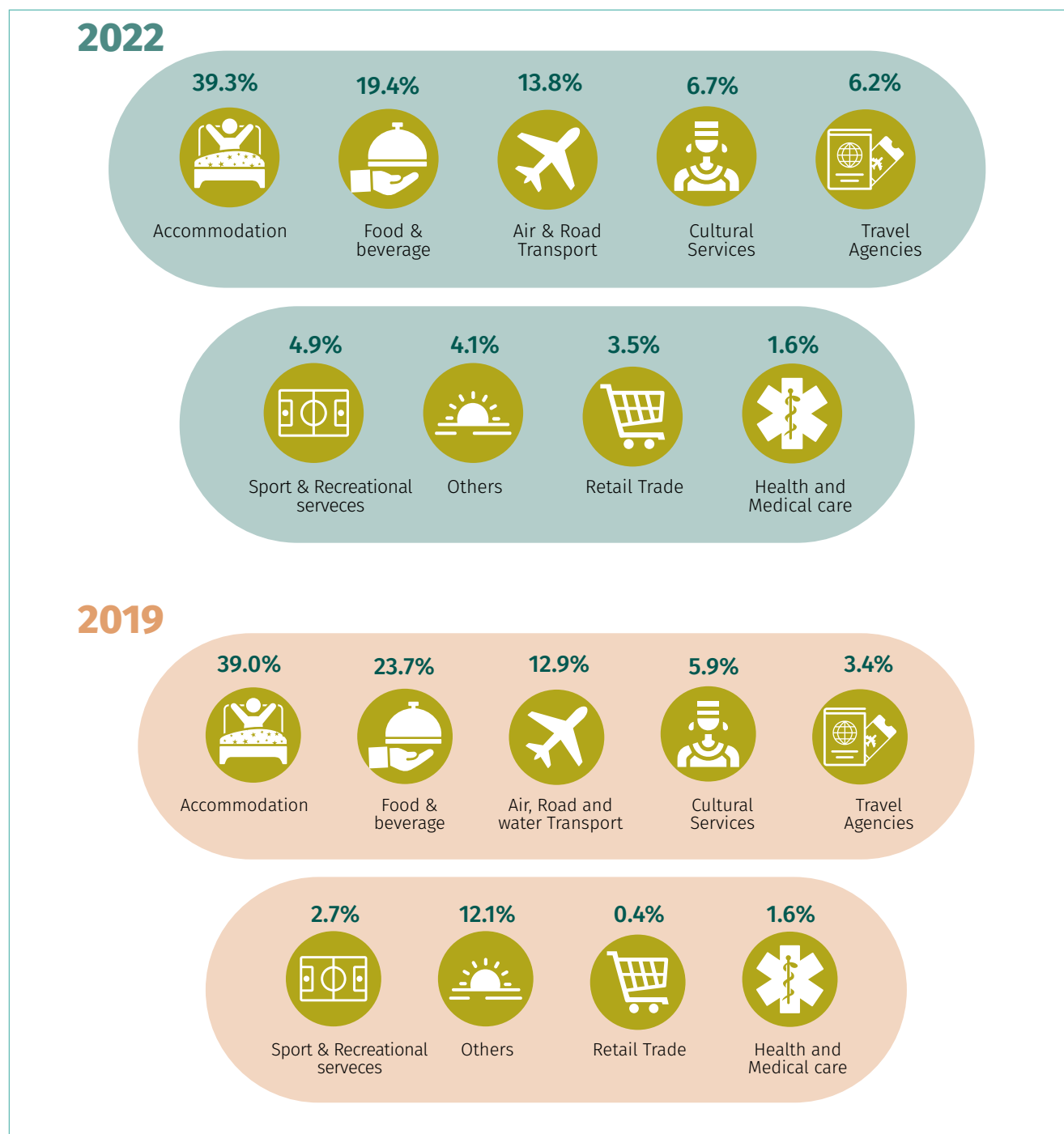
Figure 2.3: Inbound Tourism Expenditure by Products, Uganda, Growth Rates (in percent): 2019-2022

Source: Tourism Expenditure and Motivation Survey Report, 2022 (MTWA), Arrival and Departure Statistics (UBOS), 2022,

2.6 MAIN COMPONENTS OF INBOUND TOURISM EXPENDITURE

The three main products in Inbound Tourism Expenditure were Accommodation, Food and Beverage and Passenger transport with a combined share of 72.5 percent in 2022. This means 72.5 cents of every dollar/shilling by inbound visitors is spent on Accommodation, Food and Transport. The main products of Inbound Tourism in 2022 remained consistent with those in 2019.

Figure 2.4: Main Components of Inbound Tourism Expenditure, 2022 compared to 2019



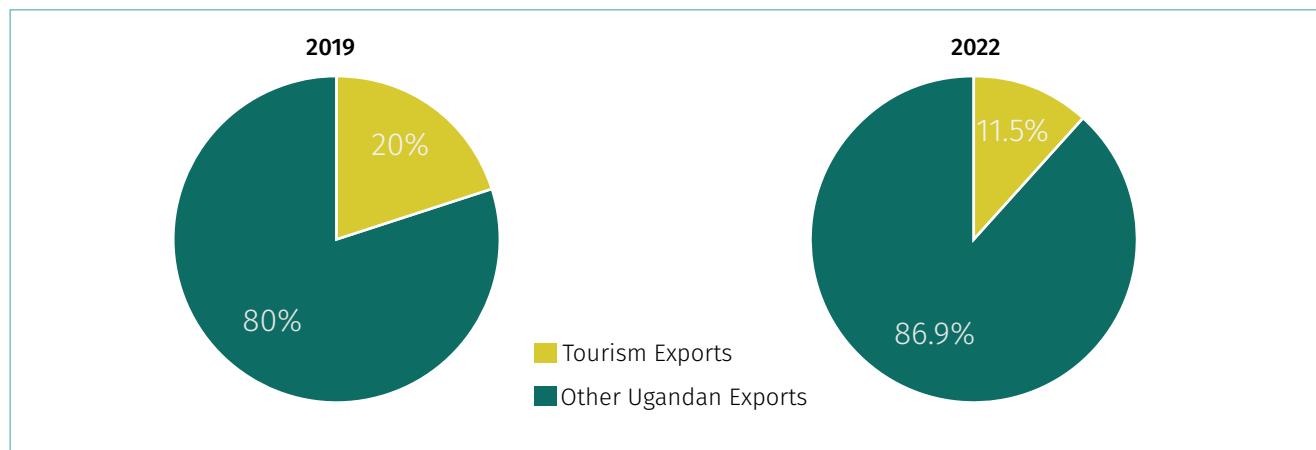
Source: Tourism Expenditure and Motivation Survey Report, 2022 (MTWA), Arrival and Departure Statistics (UBOS), 2022,

2.7 COMPARISON OF INBOUND TOURISM EXPENDITURE AND TOTAL EXPORTS

In 2022, Total Exports amounted to UGX 22,386 billion. This was a reduction in Exports by 2.1 percent compared to total Exports in 2019 (UGX 22,860.1). This is consistent with the fall in Inbound Tourism Expenditure by 43.9 percent between 2019 and 2022.

Comparing the share of Inbound Tourism Expenditure to Exports reveals that Tourism contributed 11.5 percent to exports in 2022 and 39.0 percent to service exports in 2022.

Figure 2.6: Share of Tourism Exports to Total Exports, 2019 and 2022



Source: Tourism Expenditure and Motivation Survey Report, 2022 (MTWA), Balance of Payments, Bank of Uganda, 2022

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 inbound tourism expenditure from TSA Table 1 and domestic tourism expenditure from TSA Table 2.

The Uganda National Household Survey (UNHS) 2019/20 was used to compile the Data on Domestic Tourism in 2019. This survey is carried out once every three years and it was therefore not carried out in 2022. The next survey is ongoing, and data will be ready by financial year 2023/24. The estimates for domestic tourism for 2022 were obtained by extrapolating UNHS 2019/20 survey results. This was achieved using the indicators below.

- Midyear Population Calendar Year series
- Consumer Price Index Calendar Year series
- National Accounts Calendar Year series

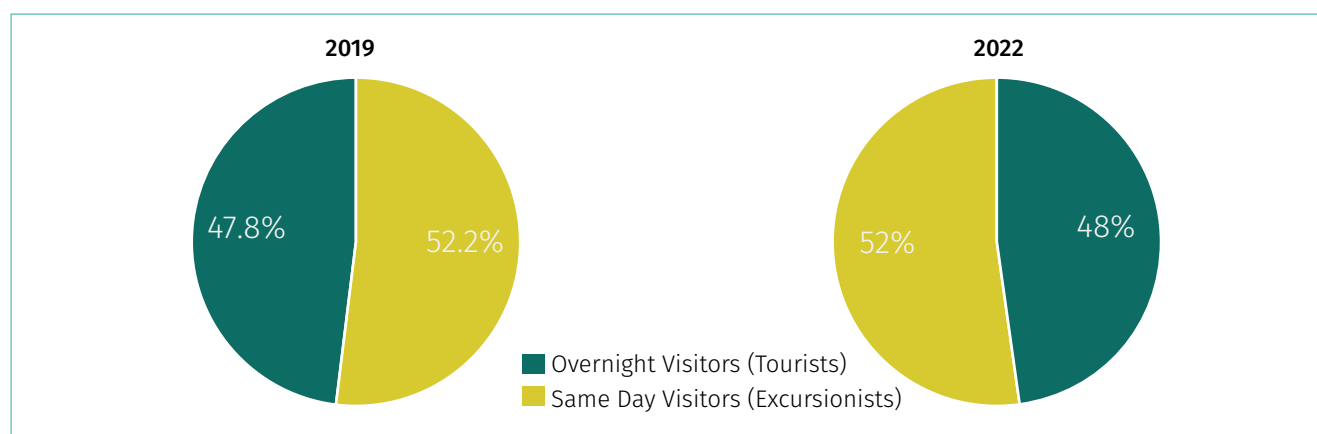
To complete TSA Table 2, domestic tourism expenditure was not limited to only the expenditure of visitors on domestic trips, but also the expenditure within the country for visitors that undertake outbound trips.

3.2 DOMESTIC VISITORS, 2022

A total of 2,659,390 domestic visitors were estimated to have visited a place outside their usual residence for any purpose other than being employed by an entity in the place visited in 2022.

Figure 3.1 shows that most of the domestic visitors were same-day visitors (1,389,227 visitors) accounting for 52.0 percent of the total Domestic visitors in 2022 as illustrated below. The number of Domestic Tourists (Overnight visitors) was estimated at 1,270,162 visitors constituting 48 percent of total Domestic visitors.

Figure 3.1: Share of Domestic Tourists by Category



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

3.2.1. Domestic Trips

A total of 23,607,830 domestic trips were made by the 2,659,390 domestic visitors during the year 2022 (Table 3.1). Out of these, 9.4 million trips were made by overnight visitors while 14.1 million trips were made by same-day visitors.

Table 3.1: Number of Domestic Trips, 2022

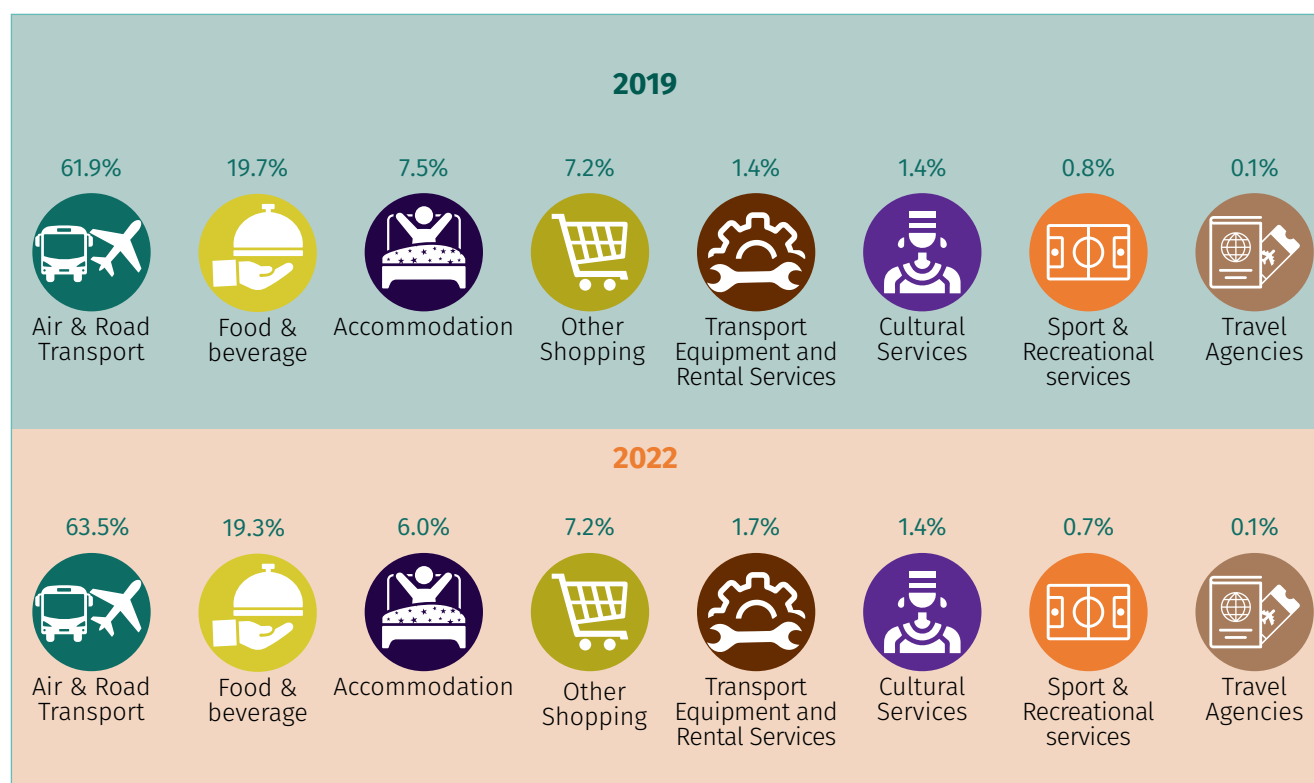
Type of Visitor	Domestic Visitors		Total Trips		% Trips
	2019	2022	2019	2022	2022
Same Day Visitors (Excursionists)	1,264,658	1,389,227	12,882,831	14,151,793	60
Overnight Visitors (Tourists)	1,156,269	1,270,162	8,608,127	9,456,037	40
Domestic Visitors (2019)	2,420,927	2,659,390	21,490,958	23,607,830	100

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

3.3 DOMESTIC VISITORS' EXPENDITURE

Domestic Tourism expenditure is the share of domestic tourism consumption acquired against payment either by visitors themselves or by other agents acting on their behalf within the country's boundaries.

Figure 3.2: Contribution of Each Industry to Total Domestic Tourism Expenditure



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

The total Tourism Domestic expenditure for 2022 was estimated at UGX 3,675.24 billion. The service that took the biggest share of domestic tourist expenditure is Road Passenger Transport services contributing 64 percent to total tourism expenditure. This was followed by 19 percent of the food and beverage serving services, 7 percent of other consumption products, and 6 percent of Accommodation services for visitors (see Figure 3.2). Sports and recreation services and Cultural services contributed the least to domestic tourism expenditure (1 percent).

The average length of stay by domestic tourists was estimated at 5.8 days. Overnight visitors spent an average

of UGX 57,786 per day while the same day visitors spent an average of UGX 33,927 per day. The overall average expenditure for both overnight and same day Visitors was estimated at UGX 45,323 per day in 2022.

3.3.1. Domestic Tourism Expenditure; 2019 Vs. 2022

The total Tourism Domestic Expenditure for 2022 was estimated at UGX 3,675.24 billion which was a 23.9 percent increase from the UGX 2,965.87 billion recorded in 2019. The Change was mainly attributed to a 27 percent rise in the amount spent on Air and Road passenger transport services by Ugandans (from UGX 1837.08 billion in 2019 to UGX 2335.26 billion in 2022).

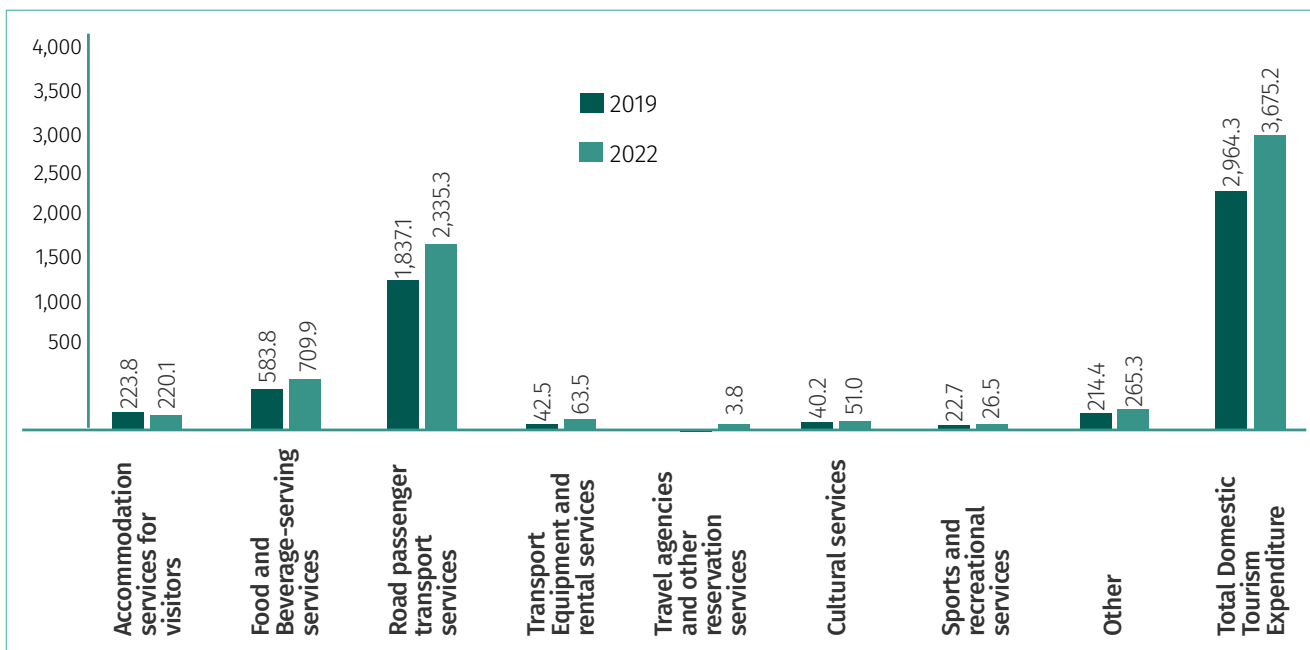
This implies that post-COVID-19 pandemic, Ugandan residents are more willing to spend on domestic tourism than before. Expenditure on Travel agency services more than doubled in the three-year period (2019 to 2022). However, it should be noted that expenditure by domestic tourists on accommodation services dropped to 1.6 percent. See Table 3.2.

Table 3.2: Domestic Tourism Expenditure by Products, In Uganda Shillings, 2019-2022

CONSUMPTION PRODUCTS (*)	2019	2022	%Change
A.1. Tourism characteristic products			
1. Accommodation services for visitors	223.79	220.11	-1.6
2. Food- and beverage-serving services	583.76	709.86	21.6
3. Air & Road passenger transport services	1,837.08	2,335.26	27.1
4. Transport equipment rental services	42.47	63.45	49.4
5. Travel agencies and other reservation services	1.55	3.83	147.4
6. Cultural services	40.17	50.95	26.8
7. Sports and recreational services	22.66	26.51	17.0
A.2. Other consumption products (a)	-		
8. Others	214.39	265.27	23.7
B.1. Valuables			
B2. Other			
TOTAL DOMESTIC TOURISM EXPENDITURE	2,965.87	3,675.24	23.9

Source: Uganda National Household Survey (UNHS 2019/20), Uganda Bureau of Statistics

Figure 3.3: Domestic Tourism Expenditure by Products, In Uganda Shillings, Billions, 2019-2022

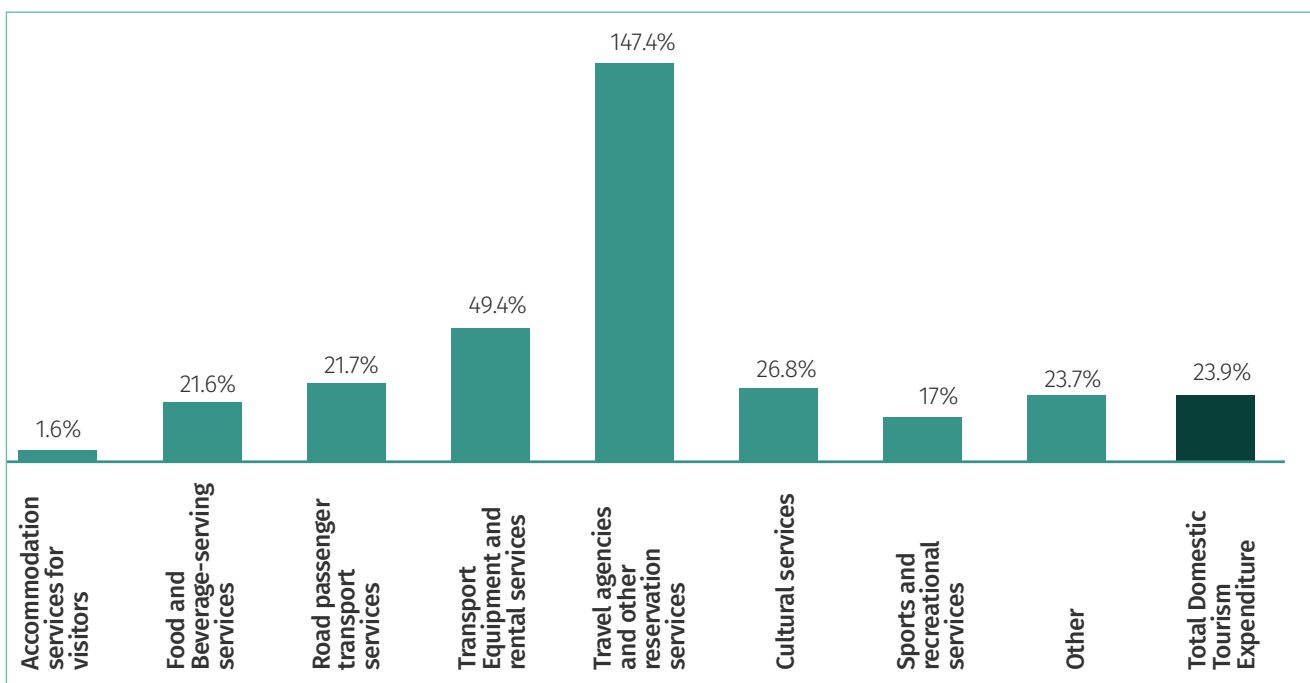


Source: Uganda National Household Survey (UNHS 2019/20), Uganda Bureau of Statistics

Furthermore, Domestic tourism expenditure on all tourism characteristic products gained growth in 2022 except Accommodation for Services for visitors that fell by 1.6 percent in 2022.

Expenditures on Travel agencies and other reservation services registered the fastest growth during the period with 147.4 percent. Expenditures on Transport equipment rental grew by 49.4 percent. Meanwhile, growth in expenditures on Food and Beverage Serving Services and Cultural services grew by 21.6 percent and 26.8 percent respectively.

Figure 3.4: Domestic Tourism Expenditure by Product Growth Rates (in Percent), 2022-2019



Source: Uganda National Household Survey (UNHS 2019/20), Uganda Bureau of Statistics

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

Domestic Tourism contributed 3.1 percent to Household Final Consumption in 2022. The Household Final Consumption in 2022 was UGX 119,281.02 billion while the Domestic Tourism Expenditure in 2022 was UGX 3,675.24 billion.

Figure 3.5: Domestic Tourism Expenditure and Household Final Consumption Expenditure (HFCE) (at current prices), 2019-2022

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%

Source: Uganda National Household Survey (UNHS 2019/20), Uganda Bureau of Statistics



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, 2019-2022

In 2022, the number of Ugandan Residents that went outside Uganda on a foreign travel increased by 20 percent compared to 2021, but 18.6 percent below 2019 Levels. A total of 397,353 Ugandans went on a foreign trip outside Uganda in 2022 as shown in Figure 4.1 below.

Figure 4.1: Ugandan Residents on a Foreign Trip, 2019-2022



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

4.3 PURPOSE OF VISIT FOR OUTBOUND VISITORS

In 2022, Ugandan Residents majorly went for a Foreign Travel for personal visits including Holiday visits (54.7 percent) and Business (42.3 percent). About three percent left the country for Education and Medical treatment as shown in Table 4.1 below.

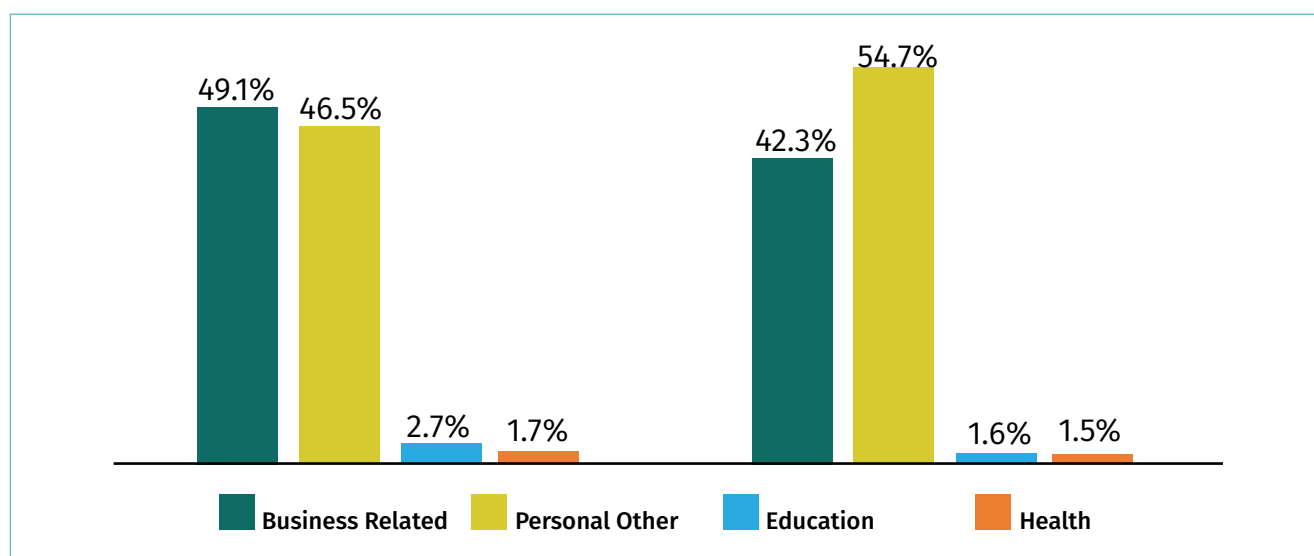
Table 4.1: Breakdown of outbound tourism expenditure by purpose of visit, 2022

Purpose of Travel	Outbound Visitors	%	Expenditure (UGX Billion)
Business Related	167,899	42.3	797.13
Personal-Other	217,250	54.7	654.61
Education	6,437	1.6	56.26
Health	5,767	1.5	62.47
Total	397,353	100	1,570.47

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

Furthermore, Foreign Travel for Personal visits including Holiday (54.7%) was the main reason why Ugandans went on a Foreign Travel in 2022 deviating from 2019 were the main reason was a Business-Related foreign travel (49.1%). This implies a 7.8 percentage point increase in outbound visitors on personal visits outside Uganda.

Figure 4.2: Ugandan Residents' main reasons for Travel abroad



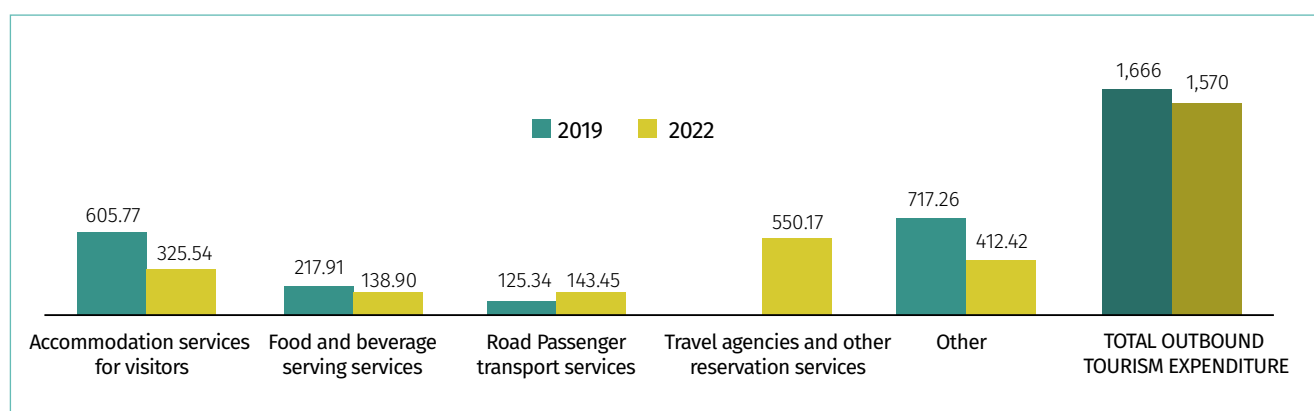
Source: Bank of Uganda Quarterly Outbound Survey, 2022, Arrival and Departure Statistics (UBOS).

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.

The Outbound Tourism Expenditure/Imports/Resident Spending on Foreign Travel dropped by 5.7 percent in 2022. Ugandan Residents spent UGX 1,570.5 billion on Foreign Travel in 2022, lower by 5.7 percent when compared with UGX 1,666.3 billion in 2019.

Figure 4.3: Outbound Tourism Expenditure by Product at Current Prices, Uganda, 2019-2022



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

Comparison of spending of Outbound Tourists between 2019 and 2022 reveals that spending on Miscellaneous products (i.e., foreign exchange services and medical services, education) registered the highest decline in 2022 with around 60.2 percent. Meanwhile, Food and Beverage serving Services dropped by 36.3 percent in 2022. Accommodation Services for Visitors registered a decrease of 46.3 percent.

Only Road passenger Transport recorded an increase of 14.4 percent in 2022.

Figure 4.4: Outbound Tourism Expenditure by Product Growth Rates (in Percent), 2022-2019

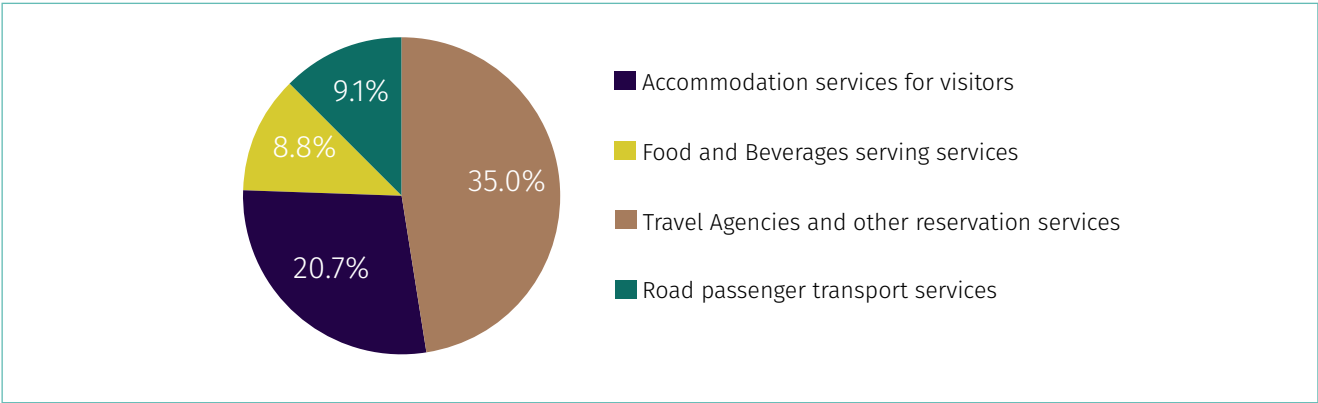


Source: Bank of Uganda Quarterly Outbound Survey, 2022, Arrival and Departure Statistics (UBOS).

4.5 MAIN COMPONENTS OF INBOUND TOURISM EXPENDITURE

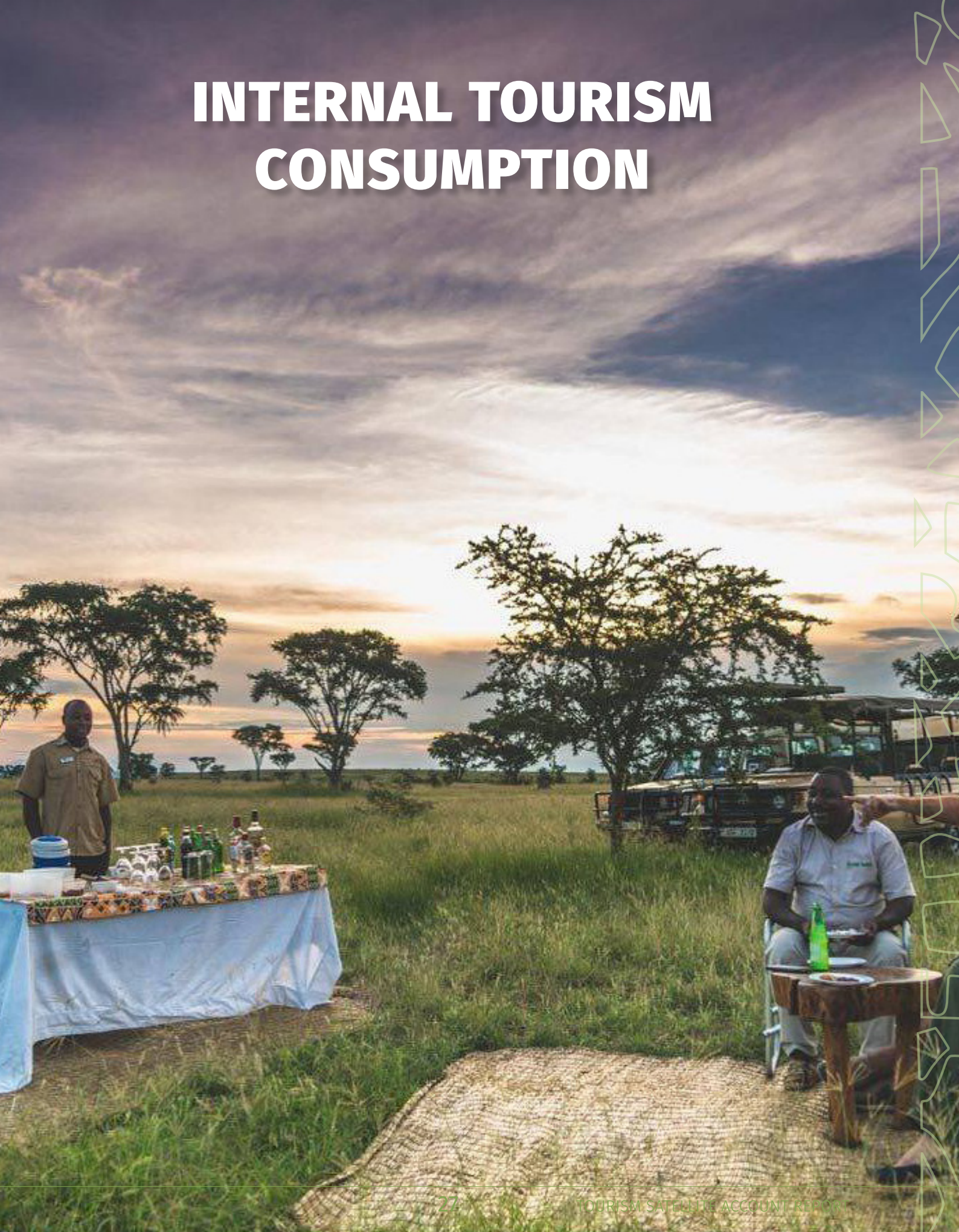
The three main products in Outbound Tourism Expenditure were Travel Agencies & reservations (35%), Accommodation (20.7%) and others miscellaneous expenses (26.3%) with a combined share of 82 percent in 2022.

Figure 4.5: Main Components of Inbound Tourism Expenditure, 2022



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

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 2022, internal tourism expenditure of Uganda reached UGX 6,246.8 billion, 17.2 percent lower compared with the UGX 7,546.3 billion in 2019.

Table 5.1: Internal Tourism Expenditure by Product at Current Prices, Uganda in UGX billions 2019-2022

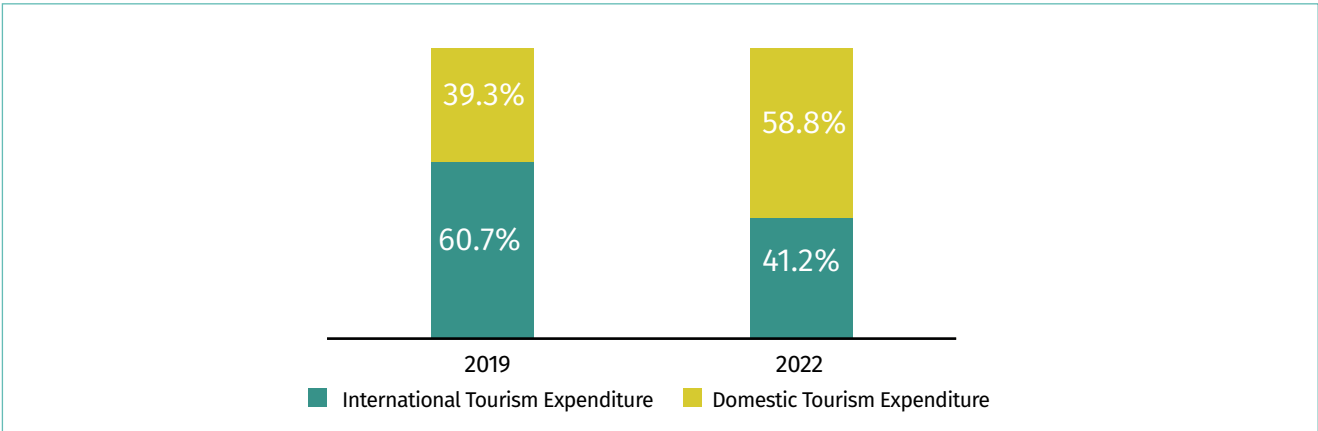
CONSUMPTION PRODUCTS (*)	2019	2022	Percent (%) Change
A.1. Tourism characteristic products			
1. Accommodation services	2,010.5	1,231.9	-38.7
2. Food- and beverage-serving services	1,667.9	1,209.2	-27.5
3. Road passenger transport services	2,411.5	2,689.1	11.5
4. Water passenger transport services	14.5	6.2	-57.7
5. Transport equipment rental services	42.5	103.6	143.8
6. Travel agencies and other reservation services	159.5	162.6	2.0
7. Cultural services	309.6	222.8	-28.0
8. Sports and recreational services	146.3	153.5	5.0
A.2. Other consumption products (a)			
Retail Trade	17.2	7.0	-59.2
Others	766.7	460.9	-39.9
B.1. Valuables	-	-	
TOTAL INTERNAL TOURISM EXPENDITURE	7,546.3	6,246.8	-17.2

Source: Tourism Expenditure and Motivation Survey Report, 2022 (MTWA), Arrival and Departure Statistics (UBOS), 2022, BOU Outbound Travel Survey 2022 and the Uganda National Household Survey (UBOS)

Expenditures from domestic tourism accounted for 58.8 percent of the total internal tourism spending dominating internal tourism expenditure in 2022 and hence showing the role domestic Tourism contributed to Tourism Performance as the main driver in 2022.

On the other hand, Expenditures from international tourists accounted for 41.2 percent of the total internal tourism spending.

Figure 5.1: Contribution of Inbound and Domestic Tourism to Tourism Performance

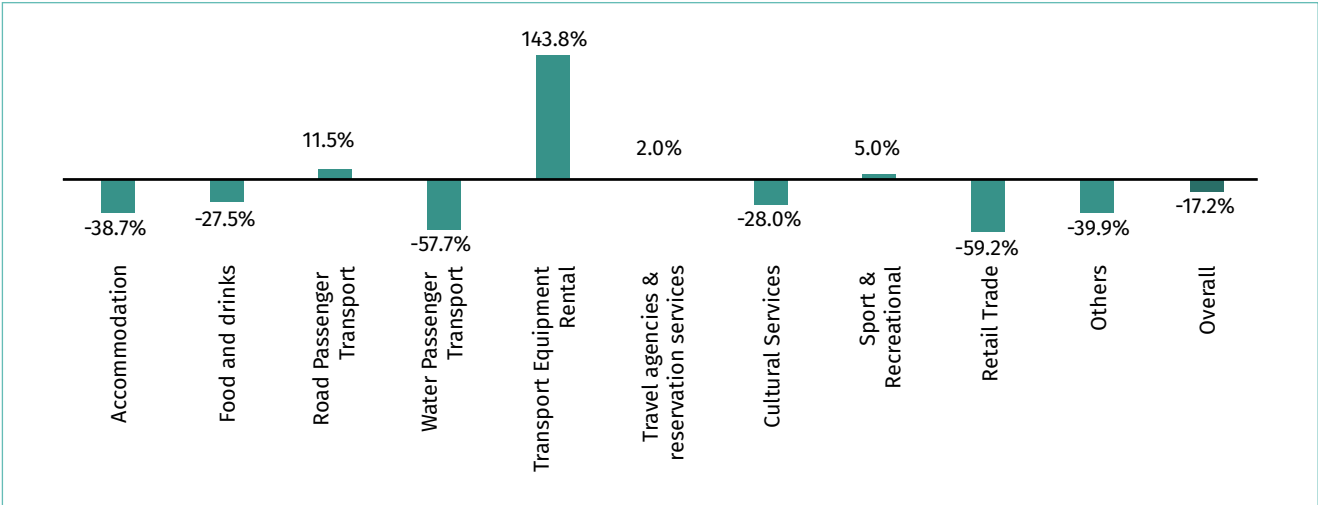


Source: Tourism Expenditure and Motivation Survey Report, 2022 (MTWA), Arrival and Departure Statistics (UBOS), 2022, BOU Outbound Travel Survey 2022 and the Uganda National Household Survey (UBOS)

Transport Equipment Rental Services for Visitors registered the fastest growth in 2022. Expenditures for the said tourism product more than doubled (143.8 percent) in 2022. Meanwhile, Road Transport Services posted the second fastest growth in 2022 with 11.5 percent. Expenditures on sports and recreation grew by 5.0 percent in 2022. (Figure 5.2).

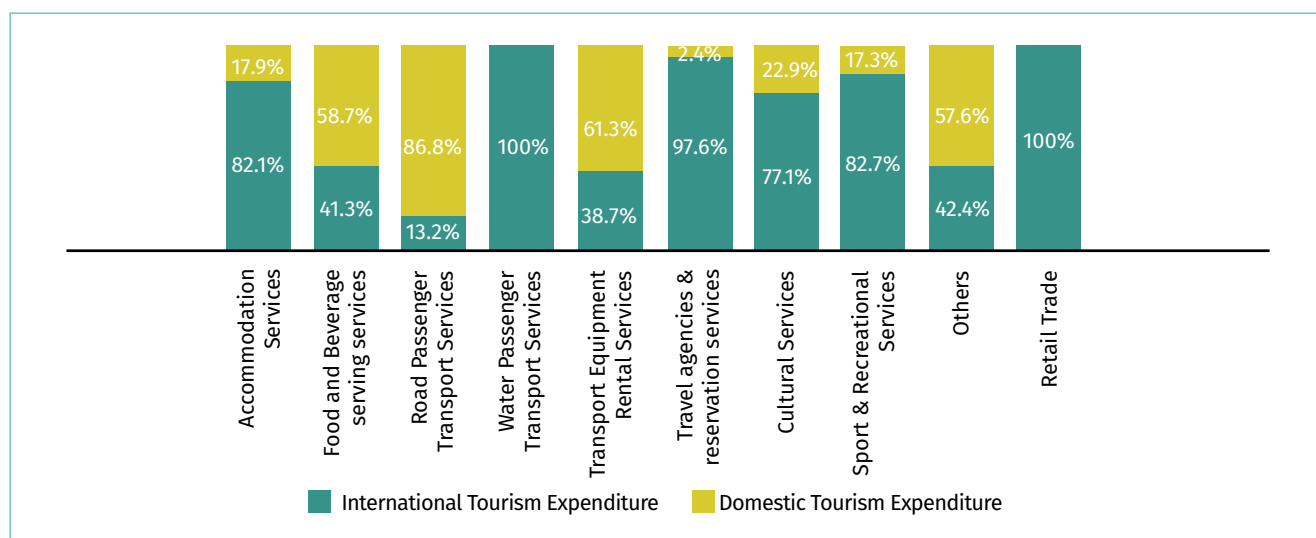
Meanwhile Expenditures by both domestic Tourists and international Tourist on Accommodation services, Food and Drinks, Cultural Services, retail trade all dropped in 2022. (Figure 5.2).

Figure 5.2: Internal Tourism Expenditure by Product Growth Rates (in Percent), 2022-2019



Source: Tourism Expenditure and Motivation Survey Report, 2022 (MTWA), Arrival and Departure Statistics (UBOS), 2022, BOU Outbound Travel Survey 2022 and the Uganda National Household Survey (UBOS)

Figure 5.3: Share of Inbound Tourism and Domestic Tourism to Internal Tourism Expenditure by Product (Percent),2022



Source: Tourism Expenditure and Motivation Survey Report, 2022 (MTWA), Arrival and Departure Statistics (UBOS), 2022, BOU Outbound Travel Survey 2022 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 6,668.2 billion in 2022 (see table 5.2). This was 16.6 percent (or UGX 1,328.72 billion) reduction from 2019 (UGX 7,996.9 billion). The Other components of tourism consumption amounted to UGX 421.4 billion in 2022 mainly by inbound tourists. This was a reduction of 6.5 percent (or 29.2 billion) from the UGX 450.6 billion in other components of tourism consumption recorded in the year 2019.

Table 5.2: Internal Tourism Consumption by Product at Current Prices, Uganda, 2019-2022

CONSUMPTION PRODUCTS (*)	2019	2022	%Change
Accommodation services	2,290.5	1,513.7	-33.9
Food- and beverage-serving services	1,838.6	1,348.7	-26.6
Railway passenger transport services	-	-	
Road passenger transport services	2,411.5	2,689.1	11.5
Water passenger transport services	14.5	6.2	-57.7
Air passenger transport services	-	-	
Transport equipment rental services	42.5	103.6	143.8
Travel agencies and other reservation services	159.5	162.6	2.0
Cultural services	309.6	222.8	-28.0
Sports and recreational services	146.3	153.5	5.0
Others	766.7	460.9	-39.9
Retail trade	17.2	7.0	-59.2
TOTAL INTERNAL TOURISM CONSUMPTION	7,996.9	6,668.2	-16.6

Source: Tourism Expenditure and Motivation Survey Report, 2022 (MTWA), Arrival and Departure Statistics (UBOS), 2022, BOU Outbound Travel Survey 2022 and the Uganda National Household Survey (UBOS)

The drop in tourism consumption in 2022 shows varying impacts of the pandemic on different parts of Uganda's visitor economy. Table 5.2 shows that the year 2022 also shows parts of Uganda's Visitor Economy that are leading recovery.

- Road Passenger Transport Services – increased by 11.5% (UGX 277.6 billion) in 2022
- Transport Equipment Rental Services – increased by 143.8% (UGX 61.1 billion) in 2022
- Sports and Recreational Services – increased by 5% (UGX 10.2 billion) in 2022
- Travel Agencies & other reservation Services – increased by 2% (UGX 3.2 billion) in 2022

In spite of a turnaround in 2022, the most severely impacted goods and services have been:

- Accommodation services – reduced by 33.9% (UGX 776.8 billion) in 2022
- Food and Beverage Services – reduced by 26.6% (UGX 489.9 billion) in 2022
- Cultural Services – reduced by 28.0% (UGX 86.8 billion) in 2022
- Shopping, gifts, and souvenirs – reduced by 59.2% (UGX 10.2 billion) in 2022
- Water Passenger Transport – reduced by 57.7% (UGX 8.4 billion) in 2022

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

In 2022, Internal Tourism Consumption contributed 4.8 percent to Household Final Consumption Expenditure (HFCE) and Exports. Before COVID-19, Internal Tourism consumption contributed 6.9 percent to Household Final Consumption Expenditure (HFCE) and Exports, meaning a 2.3 percentage point drop in contribution in 2022.

Table 5.3: Internal Tourism Consumption and Household Final Consumption Expenditure (HFCE) and Exports (at current prices), 2019-2022

Year	Internal Tourism Consumption (UGX Millions)	Growth rate	HFCE and Exports (UGX Millions)	Growth Rate	Share of Internal Tourism Expenditure to HFCE and Exports (%)
2019	7,996.9		116,428.4		6.9%
2022	6,668.2	-16.6%	138,973.5	19.4%	4.8%

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 5.4: Key Indicators in Internal Tourism Consumption¹

	Unit	2019	2022	%Change
Internal tourism expenditure	UGX Bn	7,546.3	6,246.8	-17.2
of which: Inbound tourism expenditure	UGX Bn	4,580.4	2,571.5	-43.9
of which: Domestic tourism expenditure	UGX Bn	2,965.9	3,675.2	23.9
Other components of tourism consumption	UGX Bn	450.6	421.4	-6.5
Total Internal tourism consumption	UGX Bn	7,996.9	6,668.2	-16.6

Source: Derived Indicators

¹ (See TSA: RMF 2008 para. 4.82-4.84)



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 SOURCE DATA FOR COMPILATION OF NATIONAL ACCOUNTS

Compilation of National Accounts (NA) is based on administrative and survey data sources. Administrative data sources include the tax register, and government finance statistics among others. This is collected from MDAs like, MAAIF, URA, UCDA, CDO, UTA among others. Survey data is collected from household surveys, price surveys, Business surveys, and other surveys.

Other data sources include.

- National Accounts estimates 2022.
- Supply and Use tables 2016/17.
- Balance of Payments 2022 (BOP)
- Trade Statistics 2022

6.3 TSA TABLE 5: PRODUCTION ACCOUNTS OF TOURISM INDUSTRIES AND OTHER INDUSTRIES (AT BASIC PRICES)

TSA Table 5 summarizes the Production accounts of tourism industries and other industries at basic prices. The table is structured with an equal number of tourism characteristics products for rows and industries for each column. The table displays the diagonal pattern starting upper left of the table and the data gradually falls to the right.

Each column presents the total supply at basic prices for the tourism characteristic industry and products in rows. The second last row presents the intermediate consumption at purchasers' prices. This is followed by the last column of the table which portrays the total GVA of each industry which must be equal to each tourism product (row).

6.4 PRODUCTION PERFORMANCE BY PRODUCT, 2019-2022

The total output at basic prices for tourism industries was estimated at UGX 10,695 billion in 2022, which was a 7.1 percent increase compared to UGX 9,989.23 billion recorded in 2019. This was attributed to the increase in food and beverage serving services output, and air and road passenger transport services. In terms of composition, Food and beverages services and air & road passenger transport services together, accounted for 63.7 percent of the total tourism industries output in 2022 compared to 58.4 percent recorded in 2019.

However, the growth in production was undermined by the decline in accommodation services from UGX 3,090 billion in 2019 compared to UGX 2,747 billion recorded in 2022, contributing 25.7 percent of the tourism industries output in 2022 (See Table 6.1).

Table 6.1: TSA Table 5- Production accounts of tourism-related products, 2019 -2022

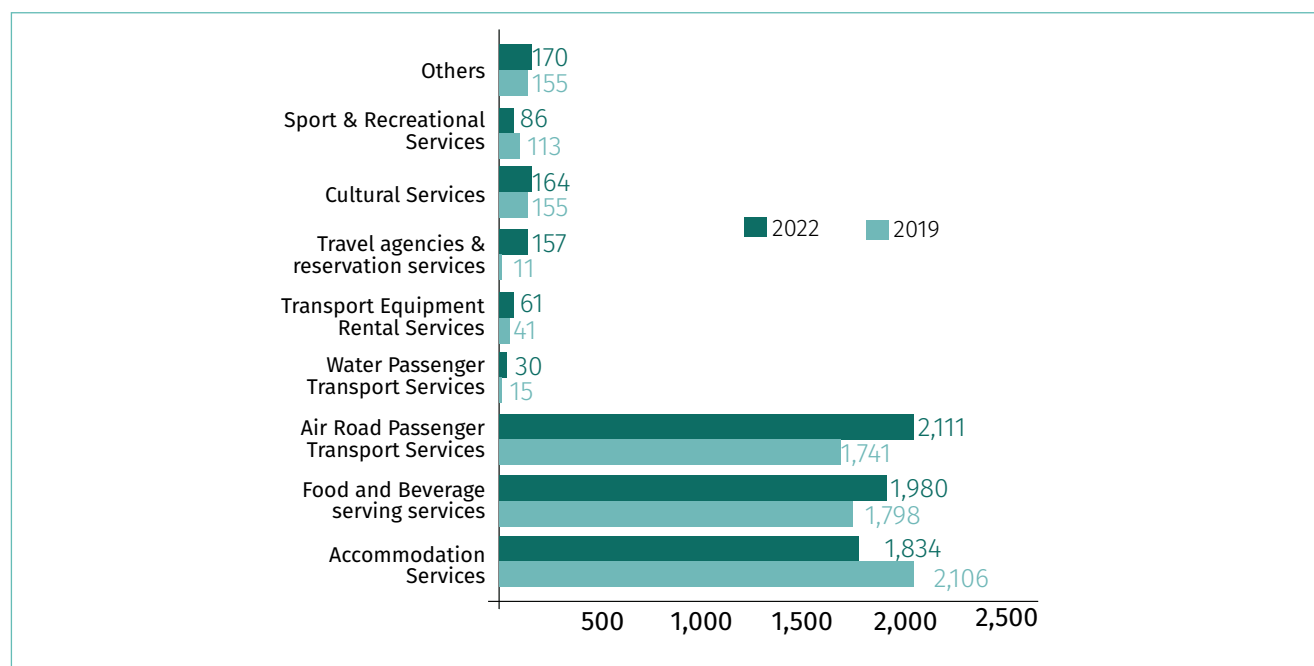
Products	Billion Shillings		Composition (%)	
	2019	2022	2019	2022
Accommodation services for visitors	3,090	2,747	30.9	25.7
Food- and beverage-serving services	2,993	3,442	30.0	32.2
Air and road passenger transport services	2,833	3,372	28.4	31.5
Water passenger transport services	25	51	0.2	0.5
Transport equipment rental services	73	106	0.7	1.0
Travel agencies and other reservation services	239	278	2.4	2.6
Cultural services	293	295	2.9	2.8
Sports and recreational services	238	178	2.4	1.7
Other consumption products (a)	206	226	2.1	2.1
Total output (at basic prices)	9,990	10,695	100	100

Source: National Accounts (UBOS)

6.5 GROSS VALUE ADDED (GVA) AT BASIC PRICES.

The Gross Value added for tourism-related industries was estimated at UGX 6,592 billion in 2022 compared to UGX 6,233 billion recorded in 2019, representing a 5.8 percent increase in value added over the period. This growth was driven by air and road passenger transport service and undermined by accommodation services (See Figure 6.1).

Figure 6.1: TSA Table 5- Value Added accounts of tourism-related industries (Billion Shillings), 20219-2022



Source: National Accounts (UBOS)

In a nutshell, in 2022, there was a 7.1 percent increase in total output and 5.8 percent increase in Gross Value Added at basic Prices over the period of time. This means that the supply (production) side of tourism related industries had a recognizable growth.



A large herd of buffalo is grazing in a savanna landscape. In the background, there are large trees with hanging seed pods and a palm tree. The sky is blue with some clouds. The text "TOURISM SUPPLY AND DEMAND RECONCILIATION" is overlaid in white, bold, sans-serif font.

TOURISM SUPPLY AND DEMAND RECONCILIATION

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

7.1 INTRODUCTION

TSA Table 6 provides a reconciliation of TSA Table 4 (demand side - internal tourism consumption) and TSA Table 5 (supply side - production accounts of tourism industries and other industries). This enables the compiler to compute the product-specific 'tourism ratio in supply' and the aggregates 'tourism value added' and 'tourism gross domestic product'.

Therefore, TSA Table 6 is the core of the Tourism Satellite account since it forms the basis of the Tourism Contribution Measures

TSA: RMF 2008 provides the following as a set of relevant indicators of the size of tourism in the economy.

- i) Internal tourism expenditure
- ii) Internal tourism consumption
- iii) Gross value added of the tourism industries (GVATI)
- iv) Tourism direct gross value added (TDGVA)
- v) Tourism direct GDP (TDGDP)

Gross value added of tourism industries (GVATI)

GVATI sums the total gross value added of all establishments belonging to tourism industries, regardless of whether all their output is provided to visitors and the degree of specialization of their production process. It leaves out the value added from other non-tourism industries whose outputs have been acquired by visitors or by others for their benefit.

Direct Tourism gross value added (DTGVA)

DTGVA covers a part of value added of tourism and other industries generated by tourism demand. This aggregate does not cover the effects of other components of internal tourism demand (for example, influence of gross investments or collective consumption). The use of the term direct in this aggregate refers to the fact that the Tourism Satellite Account measures only that part of value added (by tourism industries and other industries) due to the consumption of visitors and leaves aside the indirect and induced effects that such consumption might generate.

Direct Tourism Gross Domestic Product (TDGDP)

GDP is equal to the sum of value added to tourism and other activities generated by internal tourism demand and net tax on products included in value of tourism costs by purchasers' prices. Different outputs of each industry are valued at basic prices, excluding all net taxes on products, and inputs are valued at purchasers' prices, i.e., including transport and distribution margins and all net taxes on products.

Since the total GDP of an economy is equal to the sum of gross value added generated by all industries (at basic prices) plus net taxes on products and imports, it is possible to measure the part of GDP attributable directly to internal tourism consumption as the sum of the part of gross value added (at basic prices) generated by all industries in response to internal tourism consumption plus the amount of net taxes on products and imports included within the value of this expenditure at purchasers' prices. This "part of GDP" is the tourism direct gross domestic product (TDGDP).

Tourism GDP only measures the direct effects of tourism consumption (and these are only internal), not entire tourism demands. Tourism ratios show the proportion of goods and services supplied and internally consumed by tourism.

7.2 TOURISM DIRECT GDP BY PRODUCT AT CURRENT PRICES, UGANDA 2022

The Tourism Direct GDP was estimated at UGX 4,502 billion in 2022, down from UGX 5,093 billion recorded in 2019. In terms of contribution, the Tourism Direct GDP dropped from 3.6 percent recorded in 2019 to 2.5 percent registered in 2022 representing a decline of 1.1 percentage points. This was attributed to poor performance in Accommodation service activities over the period. The Tourism Direct Gross Value Added (TDGVA) was estimated at UGX 4,221 billion in 2022 compared to UGX 4,821 billion recorded in 2019, contributing 2.6 percent in 2022 compared to 3.7 percent recorded in 2019 (See Table 7.1).

In addition, the tourism contribution to tax revenue was estimated at UGX 280 billion in 2022 compared to UGX 264 billion in 2019, representing a 2.1 percent contribution to total taxes (See Table 7.1)

Table 7.1: Tourism direct gross value added and tourism direct gross domestic product (Billion Shillings), 2019-2022

Label	Indicator	2019	2022
a.	Total supply of goods and services	199,623	249,636
b.	Less imports of goods and services	25,477	41,310
c.	Less net taxes (taxes less subsidies) on products	10,058	13,129
d.	Equals total domestic supply of goods and services (output)	235,158	304,075
e.	Less intermediate consumption	69,761	84,756
f.	Equals Gross value added of the economy (GVA)	129,861	164,880
g.	Total tourism output	7,713	6,391
h.	Less total tourism intermediate consumption	2,884	2,170
i.	Equals tourism direct gross value added (TDGVA)	4,829	4,221
j.	Tourism share of net taxes on products	264	280
k.	Tourism direct gross domestic product (i+j)	5,093	4,502
l.	Gross Domestic Product (c+f)	139,919	178,009
m.	TDGVA percentage of GVA (i/f)	3.7	2.6
n.	Tourism Tax share to Total Tax Revenue (j/c)	2.6	2.1
o.	Tourism Direct % Contribution to GDP (k/l)	3.6	2.5

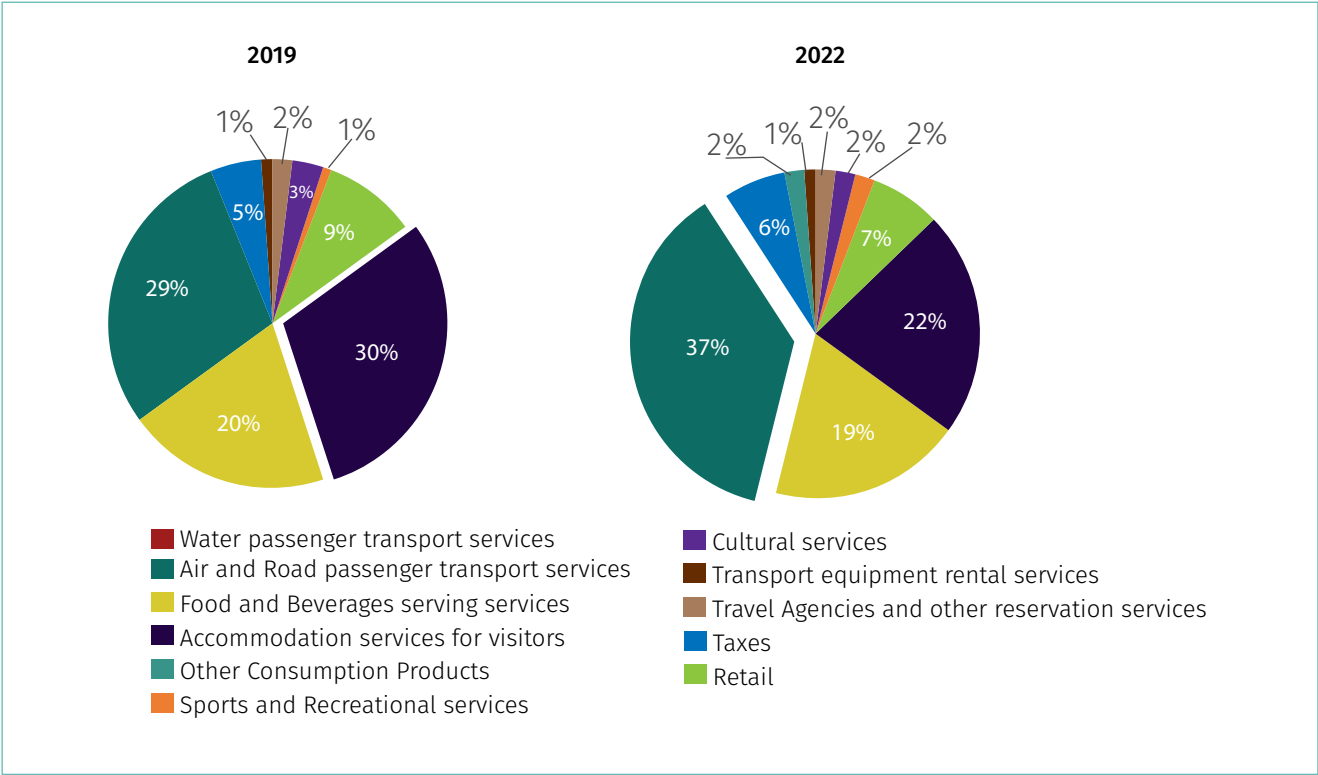
Source: National accounts, UBOS

7.3 TOURISM DIRECT GDP COMPOSITION

In terms of value addition, Air and Road passenger transport was the biggest contributor to total tourism direct GDP in 2022, contributing 37.4 percent, followed by the accommodation service (21.7 percent) and Food and beverage serving service (18.7 percent). The least contributor was water passenger transport service and transport equipment rental service each contributing 0.1 percent and 1.2 percent, respectively (See Figure 7.1 below).

Accordingly, Accommodation service activities contribution significantly contracted from 30 percent in 2019 to 22 percent in 2022 while air and road passenger transport service activities expanded from 29 percent recorded in 2019 to 37 percent in 2022.

Figure 7.1: Tourism product percentage contribution to TDGDP



Source: National accounts, UBOS

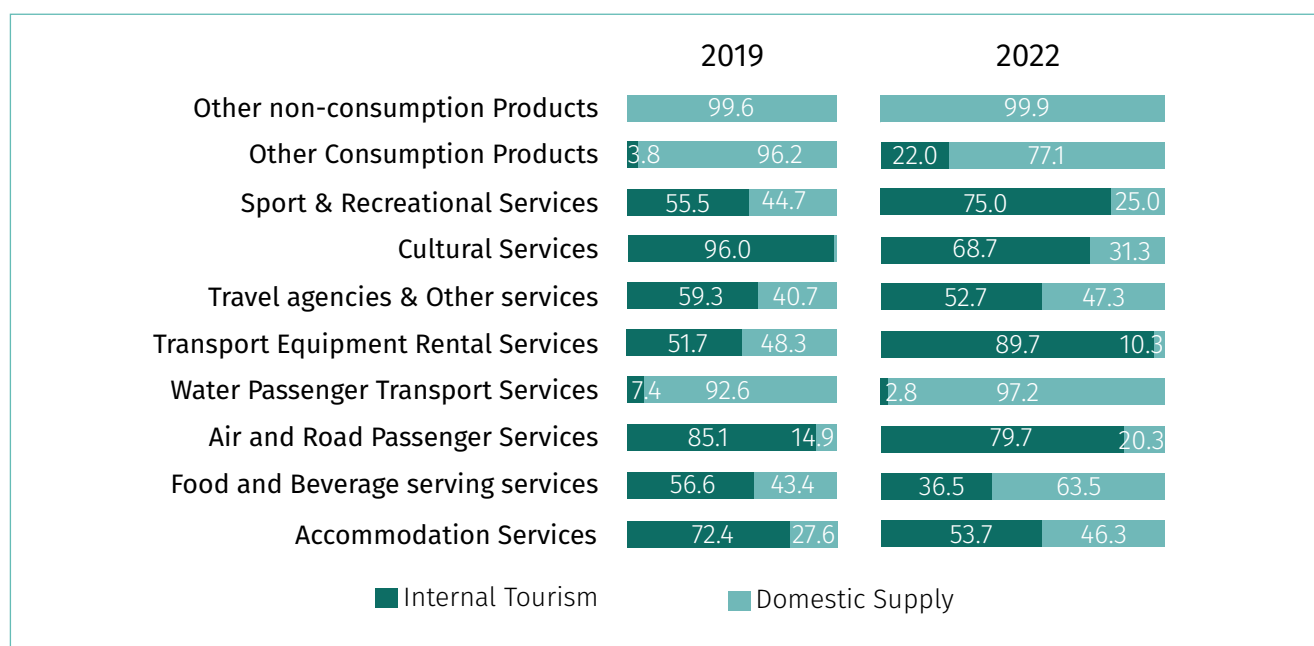
7.4 SUPPLY VS. INTERNAL TOURISM DEMAND

The total tourism industries supply was estimated at UGX 10,695 billion in 2022 compared to UGX 9,990 billion in 2019 (TSA Table 5). On the other hand, Internal tourism demand (inbound and pre-trip outbound expenditures) was estimated at UGX 6,668 billion in 2022 compared to UGX 7,996 billion recorded in 2019 (TSA Table 4) indicating that the demand declined while output increased over the period.

The demand for tourism services was significant in transport equipment rental services recorded at 89.7 percent in 2022 compared to 51.7 percent in 2019. This was followed by air and road transport service (79.7 percent) and sports and recreational services (75.0 percent) as presented in Figure 7.2.

The demand for tourism services decreased significantly in cultural services recorded at 68.7 percent in 2022 compared to 96.0 percent in 2019. This was followed by accommodation services that decreased from 72.4 percent in 2019 to 53.7 percent in 2022 and food and beverage serving services which decreased from 56.6 percent in 2019 to 36.5 percent in 2022 (see Figure 7.2).

Figure 7.2: Supply at Purchaser's Price vs. Internal Tourism Demand (Percent)



Source: Statistical Abstract 2022 and Tourism Expenditure and Motivation Survey 2022

7.5 THE EXTERNAL SECTOR

Tourism service export was estimated at UGX 2,572 billion in 2022, down from UGX 4,580 billion recorded in 2019, contributing 39.0 percent to service exports and 11.5 percent to total exports. On the other hand, Tourism service imports was estimated at UGX 1,570 billion in 2022 compared to UGX 1,666 billion recorded in 2019, contributing 13.3 percent to service imports and 3.8 percent to total imports.

Net tourism service export earnings were estimated at a surplus of UGX 1,001 billion in 2022 compared to UGX 2,914 billion surplus recorded in 2019. As a result, tourism improved the Goods and services balance of payments despite recording a deficit of UGX 18,794 in 2022. The decrease in net tourism exports was due to the reduction in the number of inbound visitors leading to a drop in tourism service exports in 2022 (see Table 7.2).

Table 7.2: 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	41,180	11,815	1,570	22,386	6,591	2,572	-18,794	-5,224	1,001

Source: National accounts, UBOS, EBOBS, BOU

In a nutshell, there was a decline in the performance of tourism industries especially on the demand side hence the Tourism Direct GDP dropped from 3.6 percent recorded in 2019 to 2.5 percent registered in 2022 representing a decline of 1.1 percentage points.

The Tourism Direct Gross Value Added (TDGVA) dropped to 2.6 percent in 2022 from 3.7 percent recorded in 2019 while the tourism contribution to tax revenue declined to 2.1 percent in 2022 from 2.6 percent recorded in 2019



EXTENSION TO THE BASIC TSA



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.

Beside 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.

These characteristics underline the importance of measuring employment through a set of complementary indicators, including the number of jobs, hours worked, earnings and full-time equivalent jobs within a given period.

The statistics presented in this section highlight the contribution of tourism towards employment based on the National Labour Force Survey (NLFS) 2021 undertaken by the Uganda Bureau of Statistics (UBOS). The overall objective of the NLFS 2021 was to provide current information for use in the generation of Labour Market indicators to facilitate decision-making across all age groups. The NLFS Survey followed the methods, concepts, and definitions in accordance with the recommendations of the 20th International Conference of Labour Statisticians (20th ICLS). The NLFS 2021 was conducted among a random sample representative of the population living in Uganda.

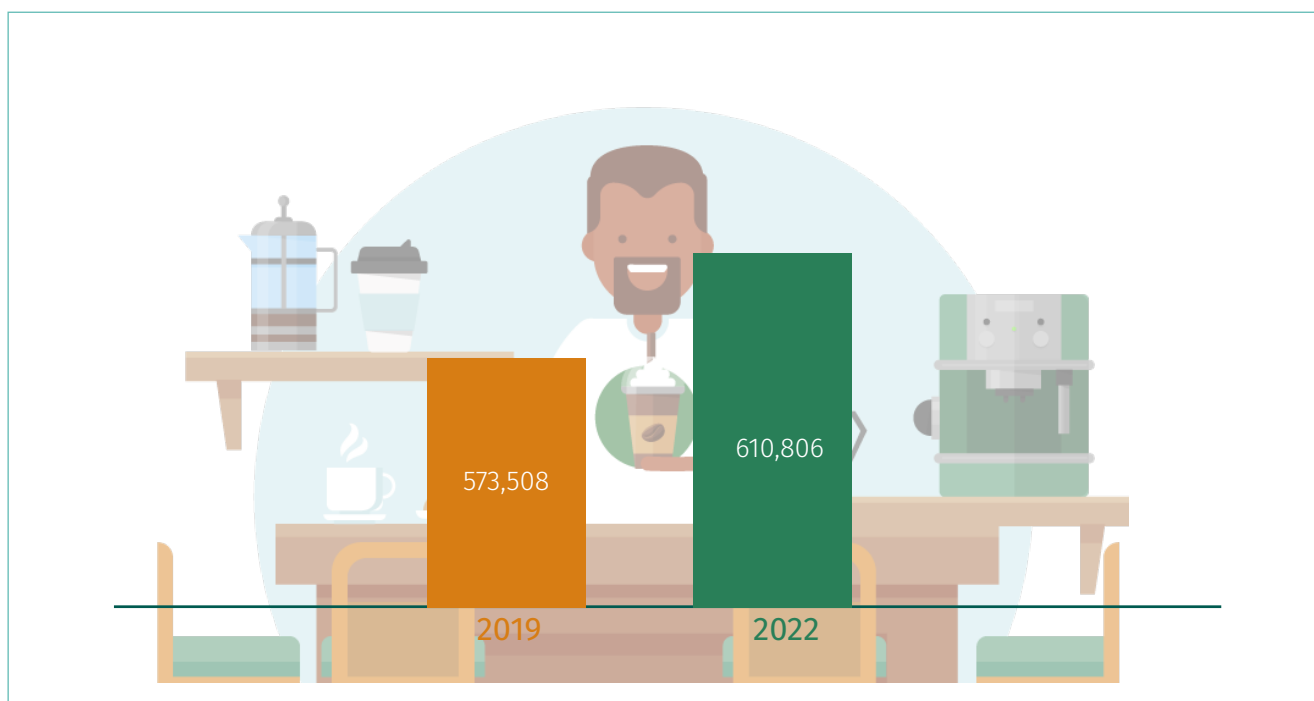
8.2 DIRECT EMPLOYMENT IN TOURISM INDUSTRIES, 2019-2022

In 2022, direct employment in tourism related industries stood at 610,806 and contributed to around 5.7 percent of total employment.

Tourism covers a diverse range of activities and provides a substantial contribution to Uganda's economy, making it a major employer of Uganda's workers.

Direct Employment in Tourism industry increased by 6.5 percent in 2022. The Tourism Industry in 2022 provided jobs for 610,806 workers directly which was higher by 6.5 percent than the 573,508 persons employed directly in 2019. This shows recovery of the Tourism industry.

Figure 8.1: Direct Tourism Employment in Uganda, 2019-2022



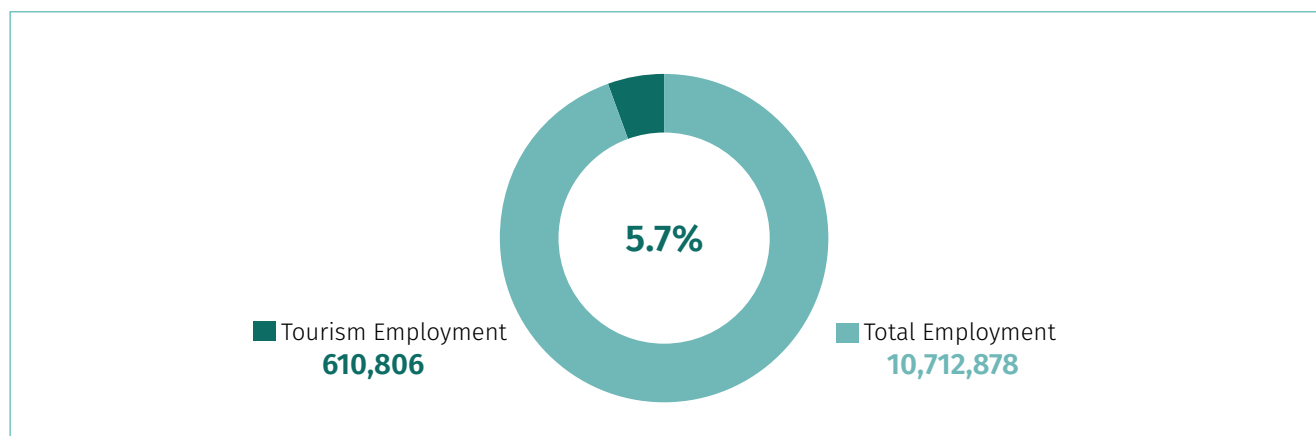
Source: National Labour Force Survey, 2021 UNHS 2019/20

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

The total employment in the country in 2022 was 10,712,787. In 2022, direct employment in Tourism industries was 610,806 persons, which contributed 5.7 percent of total employment.

This share was lower than the 6.6 percent share in 2019. This is attributed to non-tourism industries that led to the total employment growing by 24.1 percent (from 8,631,911 in 2019), faster than the 6.5 percent tourism employment growth rate.

Figure 8.2: Employment of Tourism Industries Vis-a-vis Total Employment, 2022



Source: National Labour Force Survey, 2021

8.4 THE TOP CONTRIBUTORS TO EMPLOYMENT IN TOURISM

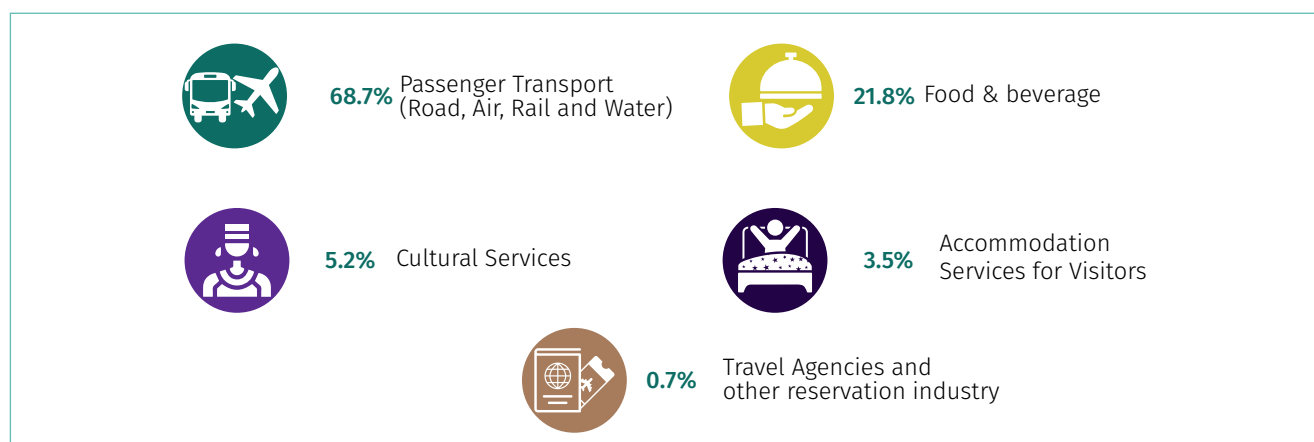
7 in every 10 workers in the Tourism Industry is employed in passenger Transport and 2 in every 10 are employed in a Restaurant/beverage serving service.

The top contributors to Employment in Tourism were passenger transport and Food and beverage serving services with a combined share of 90.5 percent. The food services industry consists of cafes, restaurants and take-aways and clubs, pubs, and bars.

The leading employers were.

- Road, Air, rail, and Water Passenger Transport - 419,400 workers
- Food and beverage Serving Activities- 133,194 workers.
- Accommodation - 4,436 workers
- Cultural Industry - 31,922 workers
- Travel agencies and other reservation industry - 3,368 workers
- Other Tourism Industries - 32,302 workers

Figure 8.3: Employment in Tourism Industries, Percent distribution: 2022



Source: National Labour Force Survey, 2021

8.5 EMPLOYMENT IN TOURISM CHARACTERISTICS INDUSTRIES

Except for Food and Beverage Serving activities, all industries recorded growth in 2022. The number of people employed in the Food and Beverage Serving activities dropped by 29.9 percent to 133,194 direct jobs in 2022.

Among the industries, jobs in the Accommodation services for visitors more than doubled in 2022 (8,425) when compared to 2019 (21,474) with more Ugandans now directly employed in the Accommodation sub sector. The second fastest tourism industry in terms of growth in jobs was the Travel Agencies & others reservation services that grew at 86.9 percent. Jobs in Passenger transport also increased by 19.2 percent (Table 8.1).

Table 8.1: Total Employment and Employment in Tourism Industries, Uganda: 2019-2022 (in thousand persons)

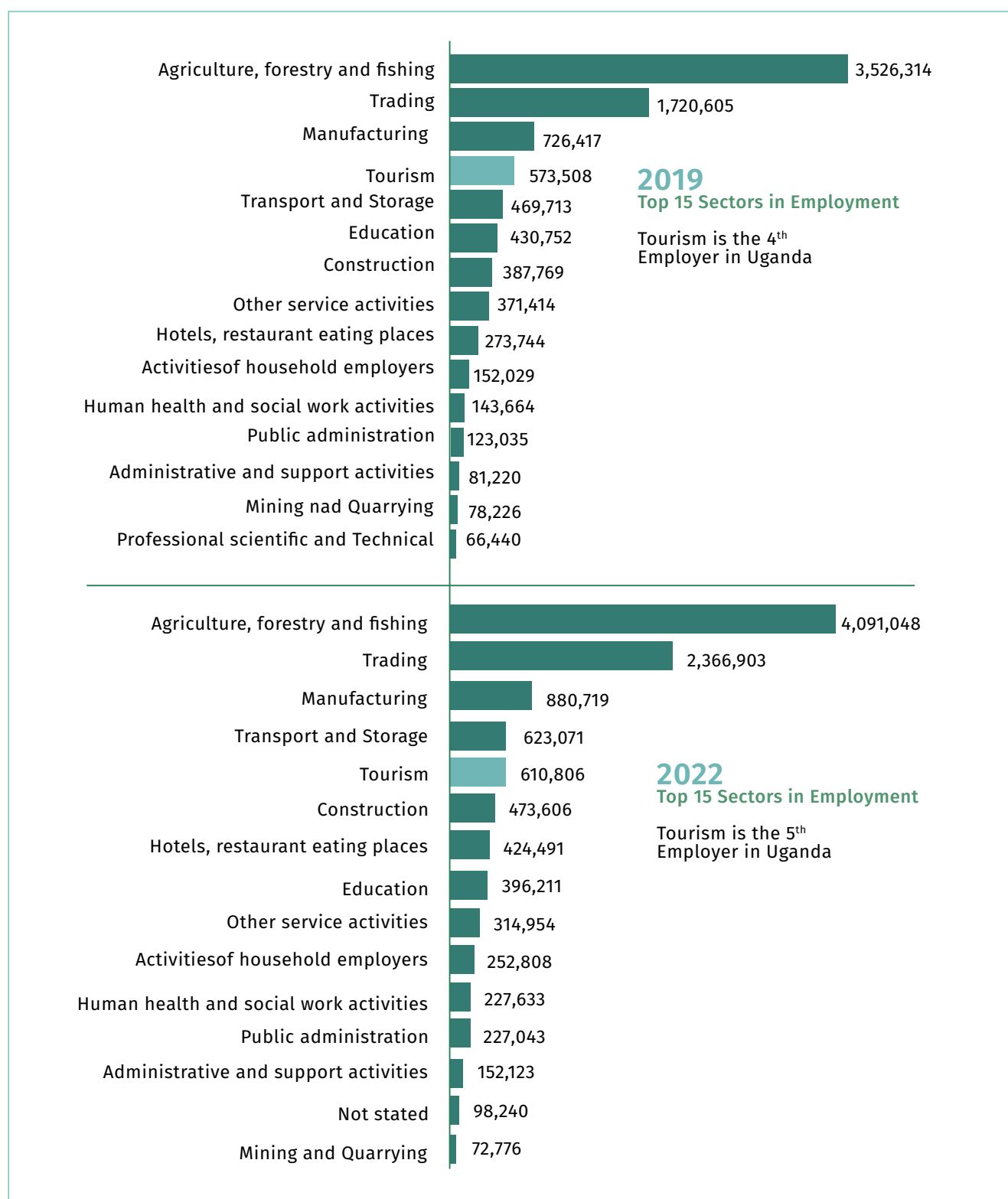
TOTAL EMPLOYMENT IN UGANDA	2019	2022	%Change
Accommodation services for visitors	8,425	21,474	154.9%
Food and beverage serving activities	189,874	133,194	-29.9%
Passenger transportation*	351,812	419,400	19.2%
Travel agencies and other reservation services activities	2,374	4,436	86.9%
Other tourism industries*	21,022	32,302	53.7%
TOTAL TOURISM CHARACTERISTIC INDUSTRIES	573,508	610,806	6.5%

Source: National Labour Force Survey, 2021

8.6 TOP SECTORS IN EMPLOYMENT IN TOURISM CHARACTERISTICS INDUSTRIES

Figure 8.4 below shows the top 15 sectors in employment in Uganda.

Figure 8.4: Top 15 Employers in Uganda

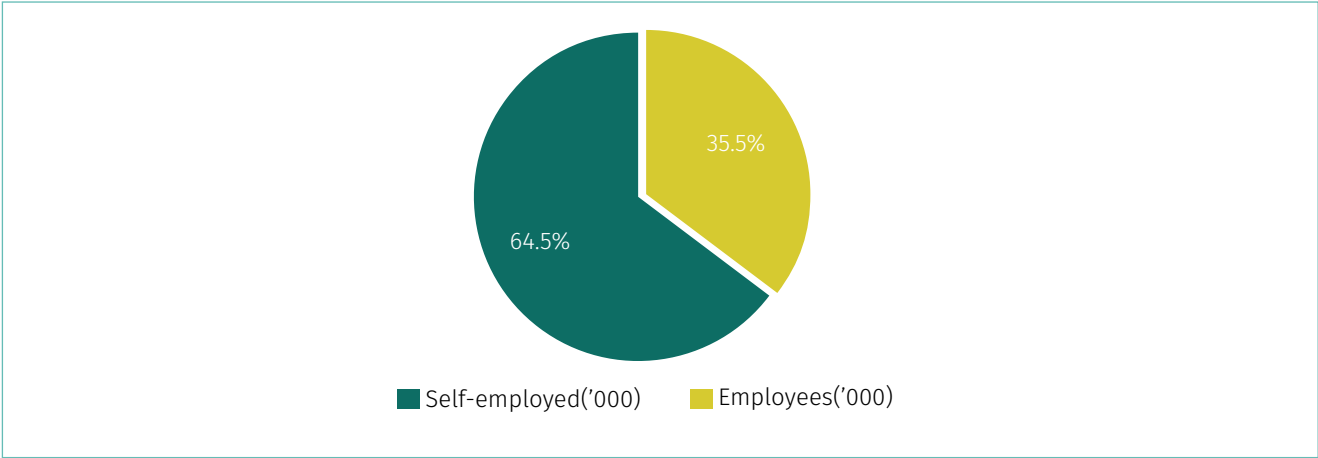


Source: National Labour Force Survey, 2021

8.7 STATUS OF EMPLOYMENT IN THE TOURISM INDUSTRY

Tourism is an industry with high self employed. In 2022, tourism provided employment to 394,003 self-employed workers and 216,803 employees, meaning that 64.5 percent were self-employed. This implies 6 in every 10 workers in the Tourism industry is self Employed.

Figure 8.5: Persons directly employed in tourism industries by status in employment, 2022.

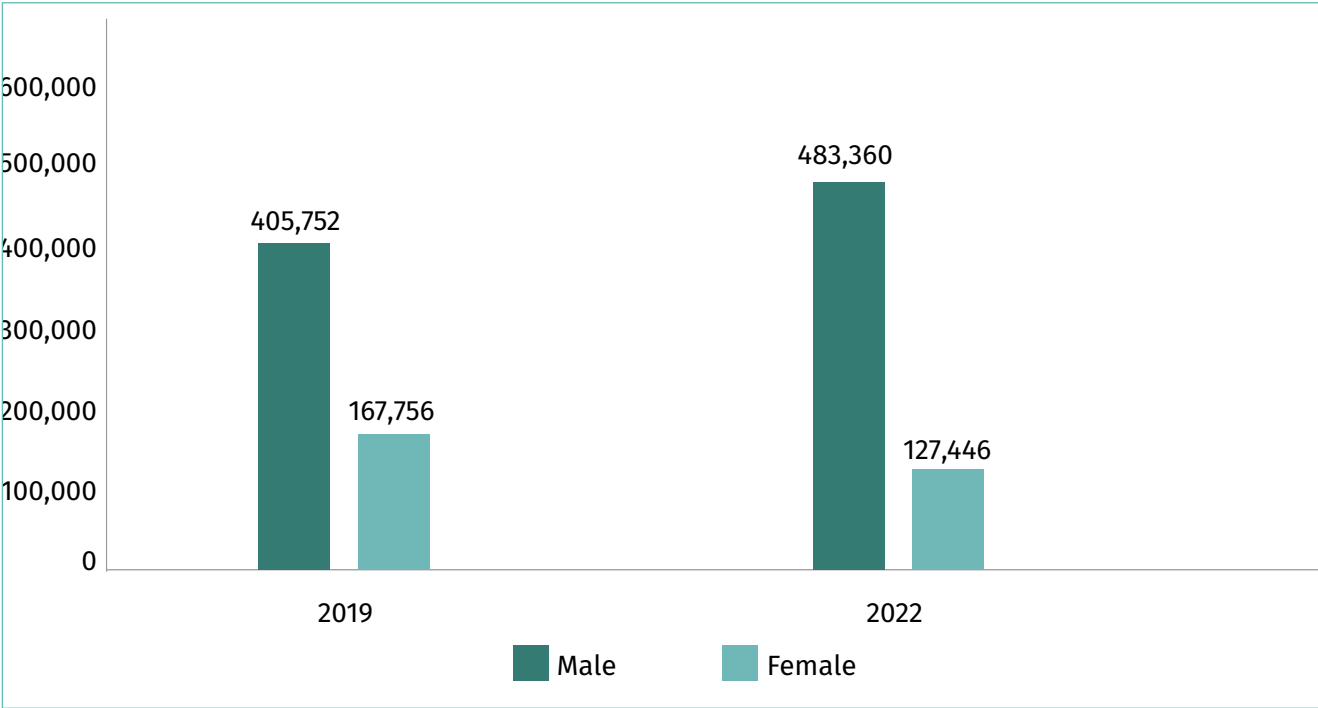


Source: National Labour Force Survey, 2021

8.8 GENDER OF WORKERS IN THE TOURISM INDUSTRY

In 2022, Tourism was a male dominated industry, with 79 percent (483,360) of the workers being male, while only 21 percent (127,446 workers) were female. This is like 2019, where 71 percent were male, while 29 percent were female.

Figure 8.6: Gender of workers in the Tourism Industry 2019 - 2022



Source: National Labour Force Survey, 2021

8.9 LEVEL OF EDUCATION OF WORKERS IN THE TOURISM INDUSTRY

Of the 610,806 employees in Tourism, 49.2 percent had attained at most a Primary level education, while 38.5 percent have attained Secondary school education. Only 7.7 percent have tertiary level or higher, while 3.5 percent have received no education at all. (Table 8.2)

Table 8.2: Level of Education of workers in the Tourism Industry 2022

Tourism industries	No education	Primary	Secondary	Tertiary and above	Not stated	TOTAL
Accommodation for visitors	243	4,693	9,625	6,913	-	21,474
Food- and beverage-serving industry	12,422	66,975	47,398	5,678	721	133,194
Air and Road passenger transport	8,873	224,962	161,707	17,922	5,936	419,400
Water passenger transport	-	81	-	-	-	81
Travel agencies and other reservation industry	-	-	264	4,171	-	4,436
Cultural Industry	-	3,562	16,006	12,353	-	31,922
Sports and recreational industry	-	-	203	-	-	203
Retail trade of Country-specific tourism characteristic goods	12	27	34	24	-	96
Total	21,549	300,301	235,238	47,063	6,657	610,806
Percentage	3.5%	49.2%	38.5%	7.7%	1.1%	100.0%

Source: National Labour Force Survey, 2021

A photograph of a person with their back to the camera, wearing a grey long-sleeved shirt, looking into a dense, lush green forest. In the background, a gorilla is visible among the trees and foliage. The scene is captured in a cinematic style with soft lighting.

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. 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 INVESTMENT BY TOURISM-RELATED INDUSTRIES

Tourism-driven investment can generally be classified into three main categories, as follows:

- i) Tourism-specific fixed assets These are assets that are used exclusively or almost exclusively in the production of tourism goods and services.
- ii) Investment by the tourism industries in non-tourism-specific fixed assets; These are assets that are used in the tourism industry but are not specific to tourism.
- iii) Tourism-related infrastructure; This is infrastructure that is put in place by the public authorities to facilitate tourism.

Gross fixed capital formation is measured by 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 (such as subsoil assets or major improvements in the quantity, quality, or productivity of land) realized by the productive activity of institutional units.

9.3 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.

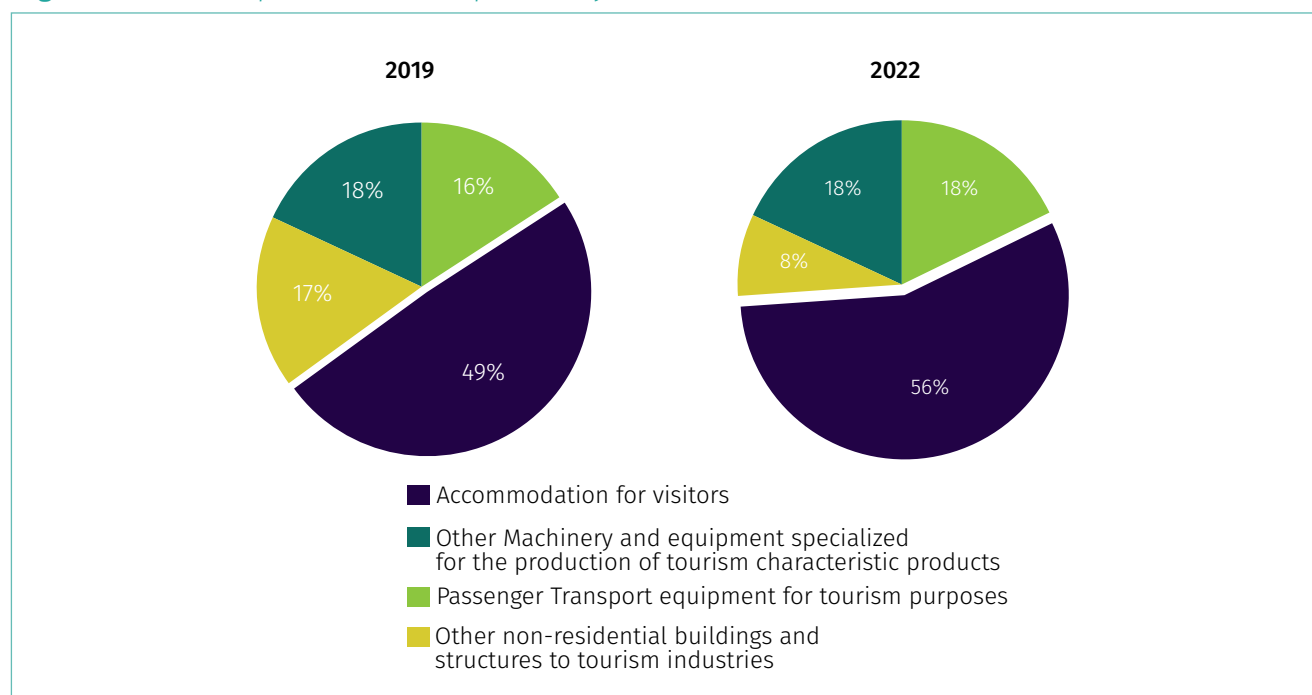
Tourism GFCF directly contributed 18.3 percent to total investment in 2022. The Gross fixed capital formation for Uganda in 2022 was estimated at UGX 40,963 billion of which 18.3 percent was the direct contribution of Tourism (UGX 7,505 billion). The tourism share dropped by 0.7 percentage points from 19.0 percent contribution recorded in 2019. There was however an increase of 16.5 percent in Tourism assets over the three-year period (2019 to 2022). See Table 9.1

Table 9.1: Gross Fixed Capita Formation Vs Tourism Gross Fixed Capital Formation

	2019 UGX Bn	2022 UGX Bn	Growth Rate
Tourism Gross Fixed Capital Formation	6,444.8	7,505.0	16.5%
Gross Fixed Capital Formation (GFCF)	33,849.9	40,963.8	21.0%
Share of Tourism Gross Fixed Capital Formation to Gross Fixed Capital Formation (GFCF) (In percent)	19.0%	18.3%	-0.7%

Source: National accounts, UBOS

The main contributor to tourism specific assets was investment in accommodation for visitors estimated at UGX 4,239 billion, accounting for 56.5 percent of the total tourism assets in 2022 compared to 49.3 percent recorded in 2019. This was followed by other machinery and equipment specialized to produce tourism-characteristic products (18.0 percent). See Figure 9.1 below.

Figure 9.1: Tourism specific assets composition by tourism services

Source: National accounts, UBOS

In a nutshell, of the total GFCF, the Tourism Gross fixed capital formation contributed 18.3 percent in 2022. Despite 0.7 percentage point's drop from 19.0 percent recorded in 2019. There was an increase of 16.5 percent in Tourism specific assets in 2022.





TOURISM COLLECTIVE CONSUMPTION

CHAPTER 10 : TSA TABLE 9: TOURISM COLLECTIVE CONSUMPTION

10.1 INTRODUCTION

A service that is offered simultaneously to all community members or all community members within a specific segment, such as all households in a certain region or country, is known as a collective consumption service. Collective services² are automatically acquired and consumed by all members of the community, or section of the community, without any action on their part.

“The provision of security and defence, 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 development of tourism in Uganda is significantly influenced by the government. The Government has identified tourism as one of its key sectors and believes that it presents a crucial opportunity that must be taken advantage of immediately to accelerate Uganda’s socioeconomic transformation into a thriving middle-income nation.

Tourism in Uganda is Government led and private sector driven. The Government establishes the legal framework for all tourism activities in the country. The granting of licences to tourism firms and the need that tourism stakeholders uphold the bare minimum of acceptable standards allow the government to guarantee the quality of the services rendered. It offers recommendations for safeguarding both the natural environment and humanity’s cultural and historical heritage. It examines the patterns of travel and may create or support government campaigns to draw people to regions at particular times of the year.

The Government organizes important events and coordinates private initiatives that are involved in serving visitors. In some circumstances, it coordinates and manages the funding of the necessary investments for the tourism industry. These duties are carried out at both the national and local levels of government.

The value of these different activities developed by the public administration can be established along the same parameters of measurement as any other collective non-market services; that is through their cost of production. The value of consumption is, by convention, equal to the value of production.

TSA Table 9 shows a list of non-market services that are to be considered as tourism collective non-market services in Uganda according to the Classification of the Functions of Government (COFOG). Table 9 compiles this information by product and levels of government in Uganda (Central and Local).

10.2 SOURCES OF DATA

The sources of data for this section include the following.

- i) MTWA Annual report 2022/23
- ii) Bank of Uganda Budget Annual estimates, 2022
- iii) UBOS Annual Budget Estimates FY 2022/23
- iv) Approved Estimates OF Revenue AND Expenditure (Recurrent and Development) FY 2022/23
- v) UNRA Annual performance report 2022/23
- vi) MoFPED Fiscal Expenditure FY 2022/23; Local Government releases
- vii) Uganda Tourism Association (UTA) Annual report 2022.

2 From a Tourism Satellite Account perspective, the provision of individual services on a nonmarket basis benefiting visitors is already covered under tourism consumption as social transfers in kind. Nevertheless, there is also interest in observing the provision of so-called collective non-market services.

10.3 TOURISM COLLECTIVE CONSUMPTION

Tourism collective consumption refers to government expenditure associated with support and control of Tourism. In 2022, Tourism Collective consumption reached UGX 266.9 billion, lower by 70 percent compared with UGX 903.35 billion in 2019. This means the Government spent UGX 266.9 billion to provide tourism services.

Table 10.1: Tourism Collective Consumption by Consumption products, 2019-2022 (UGX Billions)

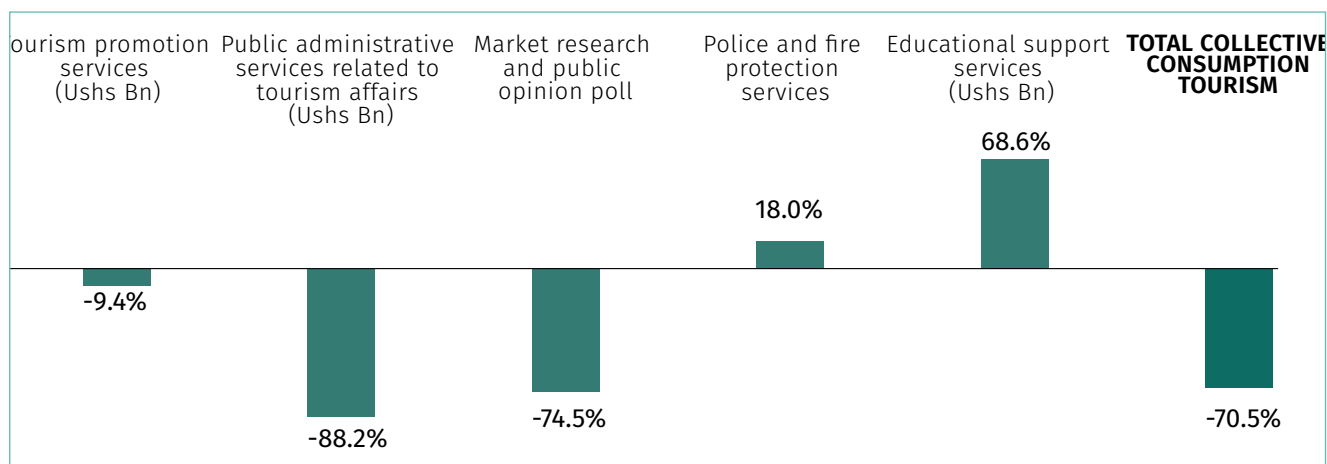
TOURISM INDUSTRIES	2019 (Ushs Bn)	2022 (Ushs Bn)	% Change
85561 Tourism promotion services	188.16	170.56	-9
91136 Public administrative services related to tourism affairs	705.63	83.282	-88
83700Market research and public opinion poll-	1.2	0.312	-74
91260 Police and fire protection services	3.08	3.634	18
92920 Educational support services	5.28	8.9	69
TOTAL COLLECTIVE CONSUMPTION TOURISM	903.35	266.688	-70

Source: TSA Committee Estimates, 2023 and various Government Reports

The main contributor to the decline in TCC in 2022 was the reduction in Public administrative services related to tourism affairs which includes government expenditure on infrastructure such as tourism roads. This expenditure reduced by approximately 88 percent from 705.6 billion in 2019 to only 83.3 billion in 2022.

Other line expenditures such as Tourism Promotional services, which includes the allocation to Uganda Tourism Board (UTB), reduced from 188.16 billion to 170.56 billion (9 percent reduction), while on the other hand, Police and fire protection services and educational support services increased by 18 percent and 69 percent respectively.

Figure 10.1: Tourism Collective Consumption by Consumption products, Growth Rates, (percent): 2019-2022

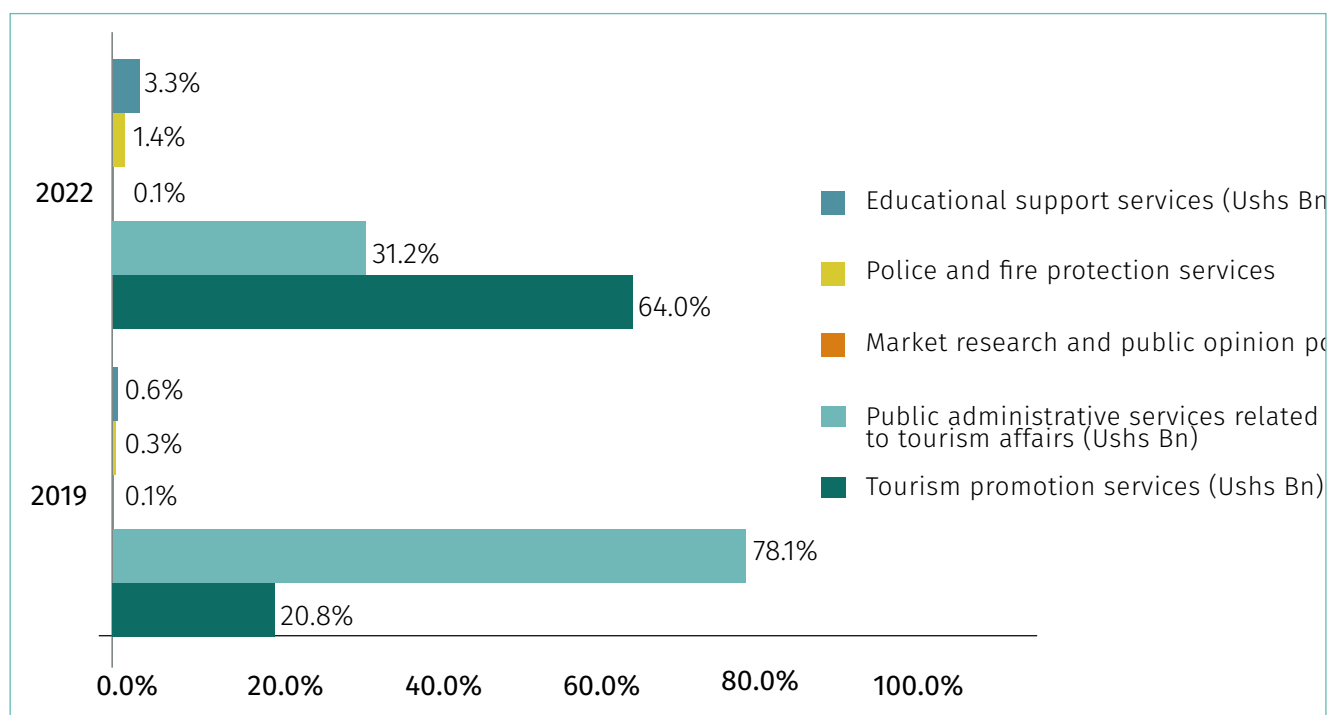


Source: TSA Committee Estimates, 2023 and various Government Reports

10.4 MAIN COMPONENTS OF TOURISM COLLECTIVE CONSUMPTION

The highest expenditure for tourism collective consumption was on Tourism Promotion Services. Expenditure on Tourism Promotion Services accounted for 64 percent of Tourism collective consumption in 2022. This was followed by expenditures on Public administrative services related to tourism affairs and the expenditures on educational support services with 31.2 percent and 3.3 percent respectively.

Figure 10.2: Tourism Collective Consumption by Consumption Products, Percent Distribution:2019-2022



Source: TSA Committee Estimates, 2023 and various Government Reports

10.5 CONTRIBUTION OF TOURISM COLLECTIVE CONSUMPTION TO GOVERNMENT FINAL CONSUMPTION EXPENDITURE (GFCE)

In 2022, Tourism Collective Consumption was UGX 266.7 billion which contributed 0.76 percent of total Government Final Consumption Expenditure (GFCE). This share was lower than the 2.41 percent share in 2019. Government Final Consumption Expenditure reduced by 6.71 percent to UGX 34.967 trillion in 2022 from UGX 37.48 trillion in 2019

Table 10.2: Tourism Collective Consumption and Government Final Consumption Expenditure (GFCE), 2019-2022

Year	Tourism Collective Consumption (TCC) in UGX Billions	Government Final Consumption Expenditure (GFCE) In Billion UGX	Share of Tourism Collective Consumption to GFCE (In percent)
2019	903.35	37,480.54	2.41
2022	266.688	34,967.00	0.76

Source: TSA Committee Estimates, 2023 and various Government Reports

10.6 TOURISM COLLECTIVE CONSUMPTION BY PRODUCTS AND LEVELS OF GOVERNMENT

About 99.9 percent of all tourism collective consumption in 2022 was incurred by the central Government of Uganda amounting to 266.28 billion while local government tourism collective consumption mounted to only 0.41 billion Uganda shillings.

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 2022 amounted to Ushs 1.65 billion.

Table 10.3: Tourism collective consumption by products and levels of government (billion Ushs) in 2022

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	170.15	-	0.41	170.56	1.65
91136 Public administrative services related to tourism affairs	83.282	-	-	83.282	
83700Market research and public opinion poll-	0.312	-	-	0.312	
91260 Police and fire protection services	3.634	-	-	3.634	
92920 Educational support services	8.9	-	-	8.9	
Total	266.28	-	0.41	266.69	1.65

Source: TSA Committee Estimates, 2023 and various Government Reports





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.

- Number of trips and overnights by forms of tourism and classes of visitors; tourists and excursionists for inbound, outbound, and domestic tourism.
- Inbound tourism: number of arrivals and overnights by modes of transport
- Number of establishments and capacity by types of accommodation
- 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) reduced from 1,468,876 visitors in 2019 to 772,825 visitors in 2022, a 47.4 percent decrease, while Excursionists (Same-day visitors) reduced from 73,744 visitors to 41,683 visitors over the same period. The total number of nights by overnight visitors reduced from 12.2 million nights in 2019 to 6.4 million nights in 2022.

Table 11.1 (TSA Table 10a): Number of trips and overnights for Inbound Tourism by forms of tourism and classes of visitors, 2019-2022

Inbound Tourism	2019		2022		%age change	
	Tourists	Excursionists	Tourists	Excursionists	Tourists	Excursionists
Number of trips	1,468,876	73,744	772,825	41,683	-47.4%	-43.5%
Number of overnights	12,191,712		6,455,652		-47.0%	

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

Domestic Tourism

The total number of domestic tourism overnight trips increased from 8.6 million trips in 2019 to 9.5 million trips in 2022, while same-day domestic tourism trips increased from 12.88 million trips in 2019 to 14.15 million trips in 2022. Total Number of nights spent by domestic tourists increased from 23.5 million nights in 2019 to 25.8 million nights in 2022. Overall, the period saw a 9.9 percent growth in number of domestic tourism trips and nights spent. This is attributed to the recoil effect after most Ugandans had been confined in their places of usual residence due to the COVID-19 lockdowns.

Table 11.2 (TSA Table 10a): Number of trips and overnights for Domestic Tourism by forms of tourism and classes of visitors, 2019-2022

Domestic tourism	2019		2022		%age change	
	Tourists	Excursionists	Tourists	Excursionists	Tourists	Excursionists
Number of trips	8,608,132	12,882,828	9,456,037	14,151,793	9.9%	9.9%
Number of overnights	23,458,783		25,769,484		9.9%	

Source: Uganda National Household Survey 2019/20 and MTWA 2023 (TSA Committee)

Outbound Tourism

The total number of outbound trips declined by 18.6 percent from 488,406 trips in 2019 to 397,353.

Table 11.3 (TSA Table 10a): Number of trips and overnights for outbound Tourism by forms of tourism and classes of visitors, 2019-2022

Outbound tourism	2019	2022	%age change
Number of trips	488,406	397,353	-18.6%
Number of overnights	4,758,080	5,031,618	5.7%

Source: Bank of Uganda Outbound Survey 2022 and MTWA 2023 (TSA Committee)

11.3 TSA TABLE 10B: INBOUND TOURISM: NUMBER OF ARRIVALS AND OVERNIGHTS BY MODES OF TRANSPORT

In 2022, a total of 196,001 arrivals into the country were by air, while 618,507 arrivals entered through the land borders. The total number of arrivals in 2022 was down by 47.2 percent from 1,542,620 arrivals in 2019.

Table 11.4 (TSA Table 10b): Inbound tourism: Number of arrivals and overnights by modes of transport, 2019-2022

Mode of transport	Number of Arrivals		%age change
	2019	2022	
Air	579,957	196,001	-66.2%
Land	962,663	618,507	-35.8%
Total	1,542,620	814,508	-47.2%

Source: Uganda Migration Statistics 2022 (MoIA)

11.4 TSA TABLE 10C: NUMBER OF ESTABLISHMENTS AND CAPACITY BY TYPES OF ACCOMMODATION

The number of short-term accommodation establishments including hotels, lodges, guesthouses, and other accommodation facilities remained the same at 22,616 establishments.

This was due to the lack of recent data as of 2022. The same is true for both room and bed capacity which were 350,550 and 371,221 respectively for both years. Bed and room occupancy in 2022 stood at 46.1 percent and 49.9 percent respectively.

Table 11.5: (TSA Table 10c): Number of establishments and capacity by types of accommodation, 2019-2022

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

Source: UBOS Quarterly Accommodation Surveys 2022

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 2022, accounting for 10 percent, while 37,134 establishments were in the Cultural, Sports and recreation industry.

Table 11.6: TSA Table 10d- Number of establishments in tourism industries classified according to average number of jobs (2019-2022)

Tourism industries	2019	2022
1. Accommodation for visitors	22,616	22,616
2. Food- and beverage-serving industry	834,222	834,222
3. Road, Air, Rail and Water passenger transport	102,908	102,908
4. Travel agencies and other reservation services industry	1,996	1,996
5. Cultural, Sports and recreation industry	37,134	37,134
Total	998,876	998,876

Source: MAPU 2016/17

Conclusion



CHAPTER 12 : CONCLUSION

The Tourism Satellite Account (TSA) is an accounting framework adopted by the 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 2022 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 2022 establishes the direct contribution of Tourism to the economy using the recommended Tourism Satellite Account methodology. The specific goals were to:

- Estimate tourism demand and supply,
- Assess value added by tourism activities to the economy,
- Establish the level of employment generated by the tourism activities,
- Measure the gross fixed capital formation by the sector, and
- 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 2022 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 2022, National Labour Force Survey, 2021, Bank of Uganda Outbound Travel Survey (2022), Arrival and Departure Statistics (UBOS) and Macroeconomic aggregates from National Accounts.

In 2022, Uganda received a total of 814,508 international visitors (Inbound Tourism) who stayed for an average of 7.4 nights. In the same year, 2.7 million domestic visitors left their usual places of residence for tourism purposes (Domestic Tourism) and spent at least 5.8 nights. A total of 397,353 Ugandan Residents travelled abroad for a foreign trip (Outbound Tourism) mainly for personal visits such as Holiday and Leisure.

Inbound tourism (Tourism exports) amounted to UGX 2,571.5 billion (TSA Table 1) in 2022 which was lower than the UGX 4,580.4 billion in 2019. Outbound tourism expenditure (Tourism Imports) dropped by 5.7 percent in 2022 from UGX 1,666.3 billion in 2019 to UGX 1,570.5 billion in 2022 (TSA Table 3).

The value of tourism exports exceeded the value of tourism imports resulting into a surplus tourism trade balance with the rest of the world estimated at UGX 1,001.1 billion in 2022. This implies that tourism improved the balance of payments position in 2022 in which the goods and services balance recorded a deficit of UGX 18,794 billion.

In 2022, Domestic tourism expenditure increased by 23.9 percent from 2,965.9 billion recorded in 2019 to UGX 3,675.2 billion in 2022. Ugandan residents were more willing to spend on tourism than during the pre-pandemic years. (TSA Table 2).

Internal tourism expenditure of Uganda was estimated at UGX 6,246.8 billion in 2022, 17.2 percent lower compared with UGX 7,546.3 billion in 2019 (covering both international and domestic tourism expenditure) (TSA Table 4).

The 2022 UTSA report estimates the internal tourism consumption at UGX 6,668.2 billion in 2022, a 16.6 percent (or UGX 1,328.7 billion) reduction from 2019 covering internal tourism expenditure plus other components of tourism consumption amounting to UGX 421.4 billion mainly by inbound tourists. (TSA Table 4).

Domestic Tourism performed well regarding internal tourism spending establishing itself as the main driver to Tourism performance in 2022. While international tourists contributed only 41 percent in 2022 (against 60.7 percent in 2019), expenditures from domestic tourism accounted for 59 percent of total internal tourism spending in 2022 (against 39.3 percent in 2019).

The total output at basic prices for tourism industries was estimated at UGX 10,695 billion in 2022, which was a 7.1 percent increase compared to UGX 9,989 billion recorded in 2019. This was attributed to the increase in food and beverage serving services output, and air and road passenger transport services. In addition, the Gross Value added for tourism-related industries was estimated at UGX 6,592 billion in 2022 compared to UGX 6,233 billion recorded in 2019, representing a 5.8 percent increase in value added over the period (TSA Table 5).

The Tourism Direct GDP was estimated at UGX 4,502 billion in 2022, down from UGX 5,093 billion recorded in 2019. In terms of contribution, the Tourism Direct GDP dropped from 3.6 percent recorded in 2019 to 2.5 percent registered in 2022 representing a decline of 1.1 percentage points. This was attributed to poor performance in Accommodation service activities over the period. The Tourism Direct Gross Value Added (TDGVA) was estimated at UGX 4,221 billion in 2022 compared to UGX 4,821 billion recorded in 2019, contributing 2.6 percent in 2022 compared to 3.7 percent recorded in 2019 (TSA Table 6).

The tourism contribution to tax revenue was estimated at UGX 280 billion in 2022 compared to UGX 264 billion in 2019, representing a 2.1 percent contribution to total taxes in 2022 compared to 2.6 percent recorded in 2019 (TSA Table 6)

Tourism service export was estimated at UGX 2,572 billion in 2022, down from UGX 4,580 billion recorded in 2019, contributing 39.0 percent to service exports and 11.5 percent to total exports. On the other hand, Tourism service imports was estimated at UGX 1,570 billion in 2022 compared to UGX 1,666 billion recorded in 2019, contributing 13.3 percent to service imports and 3.8 percent to total imports (TSA Table 6).

Net tourism service export earnings were estimated at a surplus of UGX 1,001 billion in 2022 compared to UGX 2,914 billion recorded in 2019. As a result, tourism improved the Goods and services balance of payments despite a deficit of UGX 18,794 billion recorded in 2022 (TSA Table 6).

The Direct employment in tourism grew by 6.5 percent (or 37,298 workers) to 610,806 workers in 2022 compared to 2019 (573,508). Tourism directly accounted for 5.7 percent of total employment. Tourism was the fifth highest employer in the country, after Agriculture, Trade, Manufacturing and Transport and storage. 64.5 percent of workers in tourism are self-employed, while 35.5 percent are employees. Tourism was a male dominated industry, with 79 percent (483,360) of the workers being male, while only 21 percent (127,446 workers) were female. This is like 2019, where 71 percent were male, while 29 percent were female. (TSA Table 7)

The Gross fixed capital formation for Uganda in 2022 was estimated at UGX 40,963 billion of which 18.3 percent was specific to tourism (UGX 7,505 billion). The tourism share dropped by 0.7 percentage points from 19.0 percent recorded in 2019. There was however an increase of 16.5 percent in Tourism specific assets over the three-year period (TSA Table 8)

In 2022, Collective Consumption on tourism by the local, regional, and national governments was estimated at UGX 266.9 billion, 70 percent lower than the UGX 903.35 billion (2.41 percent of TCC) in 2019. The main cause of the decline in Tourism Collective Consumption in 2022 was the reduction in Public administrative services related to tourism affairs which includes government expenditure on infrastructure such as tourism roads, et al. The contribution of Tourism to Collective consumption was estimated at 0.76 percent (TSA Table 9).

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APPENDICES

APPENDIX 1: INBOUND TOURISM (TSA TABLE 1)

Appendix 1 Table 2.10: Basic Data and Indicators for Inbound Tourism

	INBOUND TOURISM	Units	2019	2022
	Data			
	Arrivals			
1.1	Total	('000)	1,542,620	814,508
1.2	◆Overnight visitors (tourists)	('000)	1,468,876	772,825
1.3	◆Same-day visitors (excursionists)	('000)	73,744	41,683
1.4	*Of which, cruise passengers	('000)		
	Arrivals by region			
1.5	Total	('000)	1,542,620	814,085
1.6	◆Africa	('000)	1,044,227	714,576
1.7	◆Americas	('000)	150,440	17,590
1.8	◆East Asia and the Pacific	('000)	38,335	40,172
1.9	◆Europe	('000)	248,800	27,814
1.1	◆Middle East	('000)	29,858	3,472
1.11	◆South Asia	('000)	30,960	1,614
1.12	◆Other not classified	('000)		8,847
1.13	*Of which, nationals residing abroad	('000)		
	Arrivals by main purpose			
1.14	Total	('000)	1,542,620	814,508
1.15	Personal	('000)	911,688	517,055
1.16	*Holidays, leisure, and recreation	('000)	297,726	95,394
1.17	* Other personal purposes	('000)	613,962	421,661
1.18	Business and professional	('000)	630,932	297,453
	Arrivals by mode of transport			
1.19	Total	('000)	1,542,620	814,508
1.2	◆Air	('000)	579,957	196,001
1.21	◆Water	('000)		
1.22	◆Land	('000)	962,663	618,507
1.23	*Railway	('000)		
1.24	*Road	('000)	962,663	618,507
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 2023

Appendix 1 Table 2.11: Inbound Tourism Expenditure by Products, Uganda, 2019-2022

CONSUMPTION PRODUCTS (*)	2019	2022
A.1. Tourism characteristic products		
1. Accommodation services for visitors	1,786.7	1,011.8
2. Food- and beverage-serving services	1,084.2	499.3
3. Railway passenger transport services	-	-
4. Air & Road passenger transport services	574.5	353.9
5. Water passenger transport services	14.5	6.2
6. Air passenger transport services	-	-
7. Transport equipment rental services	-	40.1
8. Travel agencies and other reservation services	157.9	158.8
9. Cultural services	269.4	171.8
10. Sports and recreational services	123.6	127.0
11. Country-specific tourism characteristic services	-	-
12. Country-specific tourism characteristic services	-	-
A.2. Other consumption products (a)		
13. Health and Medical Care	-	89.5
14. Retail Trade	17.2	7.0
B.1. Valuables	-	-
B2. Other	552.3	106.1
TOTAL INBOUND TOURISM EXPENDITURE	4,580.4	2,571.5

Source: Tourism Expenditure and Motivation Survey Report, 2022 (MTWA), Arrival and Departure Statistics (UBOS), 2022,

Appendix 1 Table 2.12: Inbound Tourism Expenditure by Products, Uganda (in percent): 2019-2022

CONSUMPTION PRODUCTS (*)	2019	2022
A.1. Tourism characteristic products		
1. Accommodation services for visitors	39.0%	39.3%
2. Food- and beverage-serving services	23.7%	19.4%
3. Railway passenger transport services	0.0%	0.0%
4. Air & Road passenger transport services	12.5%	13.8%
5. Water passenger transport services	0.3%	0.2%
6. Air passenger transport services	0.0%	0.0%
7. Transport equipment rental services	0.0%	1.6%
8. Travel agencies and other reservation services	3.4%	6.2%
9. Cultural services	5.9%	6.7%
10. Sports and recreational services	2.7%	4.9%
11. Country-specific tourism characteristic services	0.0%	0.0%
12. Country-specific tourism characteristic services	0.0%	0.0%
A.2. Other consumption products (a)		
13. Health and Medical Care	0.0%	3.5%
14. Retail Trade	0.4%	0.3%
B.1. Valuables		
B2. Other	12.1%	4.1%
TOTAL INBOUND TOURISM EXPENDITURE	100%	100%

Source: Tourism Expenditure and Motivation Survey Report, 2022 (MTWA), Arrival and Departure Statistics (UBOS), 2022

Appendix 1 Table 2.13: Inbound Tourism Expenditure by Products, Uganda, Growth Rates (in percent): 2019-2022

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

Source: Tourism Expenditure and Motivation Survey Report, 2022 (MTWA), Arrival and Departure Statistics (UBOS), 2022,

APPENDIX 2: DOMESTIC TOURISM (TSA TABLE 2)

Appendix 2 Table 3.3: Basic Data and Indicators for Domestic Tourism

2	DOMESTIC TOURISM	Units	2019	2022
	Data			
	Visitors			
2.1	Total		2,420,927	2,659,390
2.2	◆Overnight visitors (tourists)	Number	1,156,269	1,270,162
2.3	◆Same-day visitors (excursionists)	Number	1,264,658	1,389,227
	Trips by main purpose			
2.4	Total	Number	2,420,927	2,659,390
2.5	Personal	Number	2,199,027	2,415,632
2.6	*Holidays, leisure, and recreation	Number	325,928	358,032
2.7	*Visiting friends & relatives	Number	806,907	886,388
2.8	*Spiritual, Religious visit / pilgrimage	Number	583,914	641,430
2.9	*Other personal purposes	Number	482,278	529,783
2.1	◆Business and professional	Number	221,900	243,757
	Indicators			
	Average length of stay		5.1	5.8
2.28	Overall Average expenditure per day	UGX	40,239	45,323
2.29	Tourist Average expenditure per day	UGX	51,304	57,786
2.3	Same day Average expenditure per day	UGX	30,121	33,927

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

Appendix 2 Table 3.4: Basic Data and Indicators for Domestic Tourism

2	DOMESTIC TOURISM			
	Data	Units	2019	2022
	Trips			
2.1	Total	('000)	21,490,960	23,607,830
2.2	◆ Overnight visitors (tourists)	('000)	8,608,132	9,456,037
2.3	◆ Same-day visitors (excursionists)	('000)	12,882,828	14,151,793
	Trips by main purpose			
2.4	Total	('000)	21,490,960	23,607,830
2.5	◆ Personal	('000)	18,426,952	20,242,016
2.6	* Holidays, leisure, and recreation	('000)	4,068,552	4,469,306
2.7	* Other personal purposes	('000)	14,358,400	15,772,710
2.8	◆ Business and professional	('000)	3,064,008	3,365,814
	Trips by form of organization			
2.16	Total	('000)	21,490,960	23,607,830
2.17	◆ Package tour	('000)	657,124	721,851
2.18	◆ Other forms	('000)	20,833,836	22,885,979
	Indicators			
	Average length of stay		5.1	5.8
2.28	Average expenditure per day	UGX	40,239	45,323

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

Appendix 2 Table 3.5: Domestic Tourism Expenditure by Products, Uganda, 2019-2022

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

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

Appendix 2 Table 3.6: Domestic Tourism Expenditure by Products, Uganda (in percent): 2019-2022

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

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

Appendix 2 Table 3.7: Domestic Tourism Expenditure by Products, Uganda, Growth Rates (in percent): 2019-2022

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

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

APPENDIX 3: OUTBOUND TOURISM (TSA TABLE 3)

Appendix 3 Table 4.3: Basic Data and Indicators for Outbound Tourism

3.	OUTBOUND TOURISM	Units	2019	2022
	Data			
	Departures			
3.1	Total	Number	297,380	397,353
3.2	◆ Overnight visitors (tourists)	Number	297,380	397,353
3.3	◆ Same-day visitors (excursionists)	Number		
	Expenditure			
3.4	Total	UGX Mn	1,666,507	1,570,472
3.5	◆ Travel	UGX Mn	1,541,151	1,427,024
3.6	◆ Passenger transport	UGX Mn	125,356	143,447
	Expenditure by main purpose of the trip			
3.7	Total	UGX Mn	1,666,281	1,570,472
3.8	◆ Personal	UGX Mn	847,858	906,877
3.9	◆ Business and professional	UGX Mn	818,423	663,595
	Indicators			
3.10	Average length of stay	Days	4.4	15
3.11	Average expenditure per day	US\$	101	63

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

Appendix 3 Table 4.4: Outbound Tourism Expenditure by Products, Uganda, 2019-2022

CONSUMPTION PRODUCTS (*)	2019	2022
A.1. Tourism characteristic products		
1. Accommodation services for visitors	605.8	325.5
2. Food- and beverage-serving services	217.9	138.9
3. Railway passenger transport services	0.0	0.0
4. Road passenger transport services	125.3	143.4
5. Water passenger transport services	0.0	0.0
6. Air passenger transport services	0.0	0.0
7. Transport equipment rental services	0.0	0.0
8. Travel agencies and other reservation services	0.0	550.2
9. Cultural services	0.0	0.0
10. Sports and recreational services	0.0	0.0
11. Country-specific tourism characteristic services	0.0	40.8
12. Country-specific tourism characteristic services	0.0	7.2
A.2. Other consumption products (a)	0.0	79.1
B.1. Valuables	717.3	285.3
TOTAL OUTBOUND TOURISM EXPENDITURE	1,666.3	1,570.5

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

Appendix 3 Table 4.5: Outbound Tourism Expenditure by Products, Uganda (in percent): 2019-2022

CONSUMPTION PRODUCTS (*)	2019	2022
A.1. Tourism characteristic products	36.4%	20.7%
1. Accommodation services for visitors	13.1%	8.8%
2. Food- and beverage-serving services	0.0%	0.0%
3. Railway passenger transport services	7.5%	9.1%
4. Road passenger transport services	0.0%	0.0%
5. Water passenger transport services	0.0%	0.0%
6. Air passenger transport services	0.0%	0.0%
7. Transport equipment rental services	0.0%	35.0%
8. Travel agencies and other reservation services	0.0%	0.0%
9. Cultural services	0.0%	0.0%
10. Sports and recreational services	0.0%	2.6%
11. Country-specific tourism characteristic services	0.0%	0.5%
12. Country-specific tourism characteristic services	0.0%	5.0%
A.2. Other consumption products (a)	43.0%	18.2%
B.1. Valuables		
TOTAL OUTBOUND TOURISM EXPENDITURE	100%	100%

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

Appendix 3 Table 4.6: Outbound Tourism Expenditure by Products, Uganda, Growth Rates (in percent): 2019-2022

CONSUMPTION PRODUCTS (*)	2019	2022
A.1. Tourism characteristic products		
1. Accommodation services for visitors		-46.3%
2. Food- and beverage-serving services		-36.3%
3. Railway passenger transport services		
4. Road passenger transport services		14.4%
5. Water passenger transport services		
6. Air passenger transport services		
7. Transport equipment rental services		
8. Travel agencies and other reservation services		
9. Cultural services		
10. Sports and recreational services		
11. Country-specific tourism characteristic services		
12. Country-specific tourism characteristic services		
A.2. Other consumption products (a)		
B.1. Valuables		-60.2%
TOTAL OUTBOUND TOURISM EXPENDITURE		-5.7%

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 5.5: Internal Tourism Expenditure by Product at Current Prices, Uganda, 2019-2022

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

Source: Tourism Expenditure and Motivation Survey Report, 2022 (MTWA), Arrival and Departure Statistics (UBOS), 2022, BOU Outbound Travel Survey 2022 and the Uganda National Household Survey (UBOS)

Appendix 4 Table 5.6: Internal Tourism Expenditure by Product at Current Prices, Uganda, 2019-2022 Percent share to Total (in percent)

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

Source: Tourism Expenditure and Motivation Survey Report, 2022 (MTWA), Arrival and Departure Statistics (UBOS), 2022, BOU Outbound Travel Survey 2022 and the Uganda National Household Survey (UBOS)

Appendix 4 Table 5.7: Internal Tourism Expenditure by Product at Current Prices Growth rates (in percent), Uganda, 2019-2022

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

Source: Tourism Expenditure and Motivation Survey Report, 2022 (MTWA), Arrival and Departure Statistics (UBOS), 2022, BOU Outbound Travel Survey 2022 and the Uganda National Household Survey (UBOS)

Appendix 4 Table 5.8: Internal Tourism Consumption by Product at Current Prices, Uganda, 2019-2022

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

Source: Tourism Expenditure and Motivation Survey Report, 2022 (MTWA), Arrival and Departure Statistics (UBOS), 2022, BOU Outbound Travel Survey 2022 and the Uganda National Household Survey (UBOS)

Appendix 4 Table 5.9: Internal Tourism Consumption by Product at Current Prices, Percent share to Total (in percent) Uganda, 2019-2022

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

Source: Tourism Expenditure and Motivation Survey Report, 2022 (MTWA), Arrival and Departure Statistics (UBOS), 2022, BOU Outbound Travel Survey 2022 and the Uganda National Household Survey (UBOS)

Appendix 4 Table 5.10: Internal Tourism Consumption by Product at Current Prices, Growth rates (in percent) Uganda, 2019-2022

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

Source: Tourism Expenditure and Motivation Survey Report, 2022 (MTWA), Arrival and Departure Statistics (UBOS), 2022, BOU Outbound Travel Survey 2022 and the Uganda National Household Survey (UBOS)

Appendix 4 Table 5.11: Tourism expenditure by product, 2022

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%

Source: Tourism Expenditure and Motivation Survey Report, 2022 (MTWA), Arrival and Departure Statistics (UBOS), 2022, BOU Outbound Travel Survey 2022 and the Uganda National Household Survey (UBOS)

APPENDIX 5: PRODUCTION ACCOUNTS TOURISM (TSA TABLE 5)

Appendix 5 Table 6.3: Production Accounts for **Tourism Industries** at Current Prices: 2019-2022

Tourism Industries	2019	2022
1. Accommodation services for visitors	3,090.0	2,747.3
2. Food- and beverage-serving services	2,992.7	3,441.9
3. Road passenger transport services	2,832.7	3,371.6
4. Water passenger transport services	24.7	51.1
5. Transport equipment rental services	73.1	106.4
6. Travel agencies and other reservation services	239.1	278.4
7. Cultural services	292.8	294.6
8. Sports and recreational services	237.9	178.3
9. Other consumption products (a)	206.1	225.6
Total	9,989.2	10,695.3

Source: National Accounts (UBOS)

Appendix 5 Table 6.4: Production Accounts for Tourism Industries at Current Prices Percent share to Total (in percent): 2019-2022

Tourism Industries	2019	2022
1. Accommodation services	30.9%	25.7%
2. Food- and beverage-serving services	30.0%	32.2%
3. Railway passenger transport services	28.4%	31.5%
4. Road passenger transport services	0.2%	0.5%
5. Water passenger transport services	0.7%	1.0%
6. Air passenger transport services	2.4%	2.6%
7. Transport equipment rental services	2.9%	2.8%
8. Travel agencies and other reservation services	2.4%	1.7%
9. Cultural services	2.1%	2.1%
Total	100.0%	100.0%

Source: National Accounts (UBOS)

Appendix 5 Table 6.5: Production Accounts for Tourism Industries at Current Prices Growth rates (in percent): 2019-2022

Tourism Industries	2019	2022
1. Accommodation services		-11.1%
2. Food- and beverage-serving services		15.0%
3. Railway passenger transport services		
4. Road passenger transport services		106.6%
5. Water passenger transport services		45.6%
6. Air passenger transport services		
7. Transport equipment rental services		0.6%
8. Travel agencies and other reservation services		-25.1%
Total		7.1%

Source: National Accounts (UBOS)

Appendix 5 Table 6.6: Gross Value Added of Tourism Industries (GVATI) by Industry, Uganda: 2019-2022

Products	2019	2022
1. Accommodation services	2,105.6	1,833.7
2. Food- and beverage-serving services	1,797.8	1,979.6
3. Air and road passenger transport services	1,741.0	2,111.4
4. Water passenger transport services	14.6	30.1
5. Transport equipment rental services	40.6	60.9
6. Travel agencies and other reservation services	111.1	157.4
7. Cultural services	155.4	163.5
8. Sports and recreational services	113.2	86.0
9. Others	153.9	169.6
Total Gross Value Added of Tourism Industries (GVATI)	6,233.2	6,592.3

Source: National Accounts (UBOS)

Appendix 5 Table 6.7: Gross Value Added of Tourism Industries (GVATI) by Industry, Share to Total; (percent), Uganda: 2019-2022

Products	2019	2022
1. Accommodation services	33.8%	27.8%
2. Food- and beverage-serving services	28.8%	30.0%
3. Air and road passenger transport services	27.9%	32.0%
4. Water passenger transport services	0.2%	0.5%
5. Transport equipment rental services	0.7%	0.9%
6. Travel agencies and other reservation services	1.8%	2.4%
7. Cultural services	2.5%	2.5%
8. Sports and recreational services	1.8%	1.3%
9. Others	2.5%	2.6%
Total Gross Value Added of Tourism Industries (GVATI)	100%	100%

Source: National Accounts (UBOS)

Appendix 5 Table 6.8: Gross Value Added of Tourism Industries (GVATI) by Industry, Growth rates (percent), Uganda: 2019-2022

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

Source: National Accounts (UBOS)

Appendix 5 Table 6.9: Gross Value Added in Tourism Industries (from TSA Table 5)

	Unit	2019	2022	%Change
GVA in tourism industries (GVATI)	US\$ Mn	1,178.9	1,032.5	-12.4%
GVA in tourism industries (GVATI)	UGX Bn	4,366.7	3,815.2	-12.6%

Source: National Accounts (UBOS)

APPENDIX 6: TOURISM RECONCILIATIONS OF DEMAND AND SUPPLY (TSA TABLE 6)

Appendix 6 Table 7.3: Key TSA Indicators

		Unit	2019	2022	%Change
GDP	Tourism Direct GDP as % of total GDP	Percent	3.6	2.5	- 1.1
	Total Gross Domestic Product (GDP)	UGX Mn	139,919,538.0	178,009,659.1	27.2%
GVA*	Tourism Direct GDP	UGX Mn	5,093,149.4	4,502,331.2	-11.6%
	Tourism Direct GVA as % of total GVA	Percent	3.7	2.6	- 1.2
	Total Gross Value Added (GVA)	UGX Mn	129,861,604.0	164,880,474.6	27.0%
	Tourism Direct GVA	UGX Mn	4,828,985.2	4,221,326.3	-12.6%

Source: National accounts, UBOS

Appendix 6 Table 7.4: Tourism Direct Gross valued Added (TDGVA) and Gross Domestic Product (GDP) at Current Prices, 2019-2022

Year	TDGVA (UGX billions)	Growth rate	GDP (UGX billions)	Growth Rate	Share of TDGVA to GDP (%)
2019	4,829.0		139,919.5		3.5%
2022	4,221.3	-12.6%	178,009.7	27.2%	2.4%

Source: National accounts, UBOS

Appendix 6 Table 7.5: Inbound Tourism Expenditure and Exports (at current prices), 2019-2022

Year	Inbound Tourism Expenditure (UGX billions)	Growth rate	Exports (UGX billions)	Growth Rate	Share of Inbound Tourism Expenditure to Exports (%)
2019	4,580		22,860		20.0%
2022	2,572	-43.9%	19,692	-13.9%	13.1%

Source: TEMS 2022 and National accounts, UBOS

Appendix 6 Table 7.6: Domestic Tourism Expenditure and Household Final Consumption Expenditure (HFCE) (at current prices), 2019-2022

Year	Domestic Tourism Expenditure (UGX billions)	Growth rate	Household Final Consumption Expenditure (HFCE) (UGX billions)	Growth Rate	Share of Domestic Tourism Expenditure to HFCE (%)
2019	2,965.9		93,568.27		3.2%
2022	3,675.2	23.9%	119,281.02	27.5%	3.1%

Source: National accounts, UBOS

Appendix 6 Table 7.7: Internal Tourism Expenditure and Household Final Consumption Expenditure (HFCE) and Exports (at current prices), 2019-2022

Year	Internal Tourism Expenditure (UGX billions)	Growth rate	HFCE and Exports (UGX billions)	Growth Rate	Share of Internal Tourism Expenditure to HFCE and Exports (%)
2019	7,546.3		116,428.4		6.5%
2022	6,246.7	-17.2%	138,973.5	19.4%	4.5%

Source: National accounts, UBOS

Appendix 6 Table 7.8: Internal Tourism Consumption and **Household Final Consumption Expenditure (HFCE)** and Exports (at current prices), 2019-2022

Year	Internal Tourism Consumption (UGX billions)	Growth rate	HFCE and Exports (UGX billions)	Growth Rate	Share of Internal Tourism Expenditure to HFCE & Exports (%)
2019	7,996.9		116,428.4		6.9
2022	6,668.2	-16.6%	138,973.5	19.4%	4.6

Source: National accounts, UBOS

Appendix 6 Table 7.9: Tourism Direct Gross Value Added (TDGVA) by **Product at Current Prices**, Uganda: 2019-2022

Products	2019	2022
1. Accommodation services	1,533.8	975.5
2. Food- and beverage-serving services	1,030.2	839.9
3. Railway passenger transport services	-	-
4. Air & Road passenger transport services	1,481.7	1,683.4
5. Water passenger transport services	8.6	3.6
6. Air passenger transport services	-	-
7. Transport equipment rental services	23.5	52.6
8. Travel agencies and other reservation services	65.7	78.9
9. Cultural services	150.9	109.2
10. Sports and recreational services	62.6	72.1
11. Other Consumption Products retail	9.7	-
12. Other industries	462.3	406.1
TOTAL DIRECT GROSS VALUE ADDED (TDGVA)	4,829.0	4,221.3

Source: National accounts, UBOS

Appendix 6 Table 7.10: Tourism Direct Gross Value Added (TDGVA) by **Product at Current Prices**, Percent share to Total (in percent) Uganda: 2019-2022

Products	2019	2022
1. Accommodation services	31.8%	23.1%
2. Food- and beverage-serving services	21.3%	19.9%
3. Railway passenger transport services	0.0%	0.0%
4. Air & Road passenger transport services	30.7%	39.9%
5. Water passenger transport services	0.2%	0.1%
6. Air passenger transport services	0.0%	0.0%
7. Transport equipment rental services	0.5%	1.2%
8. Travel agencies and other reservation services	1.4%	1.9%
9. Cultural services	3.1%	2.6%
10. Sports and recreational services	1.3%	1.7%
11. Other Consumption Products retail	0.2%	0.0%
12. Other industries	9.6%	9.6%
TOTAL DIRECT GROSS VALUE ADDED (TDGVA)	100%	100%

Source: National accounts, UBOS

Appendix 6 Table 7.11: Tourism Direct Gross **Value Added** (TDGVA) by Product at Current Prices, Growth rates (percent), Uganda: 2019-2022

Products	2019	2022
1. Accommodation services		-36.4%
2. Food- and beverage-serving services		-18.5%
3. Air & Road passenger transport services		13.6%
4. Water passenger transport services		-57.7%
5. Transport equipment rental services		123.9%
6. Travel agencies and other reservation services		20.0%
7. Cultural services		-27.6%
8. Sports and recreational services		15.1%
9. Other Consumption Products retail		-100.0%
10. Other industries		-12.1%
TOTAL DIRECT GROSS VALUE ADDED (TDGVA)		-12.6%

Source: National accounts, UBOS

Appendix 6 Table 7.12: The Tourism Balance of Payments for Uganda, 2019-2022

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%

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

Appendix 6 Table 7.13: Tourism direct **gross value added** and tourism direct gross domestic product at Current prices, 2019-2022

	2019	2022
Total supply of goods and services	199,623.1	249,636.0
Less imports of goods and services	25,476.6	41,309.7
Less net taxes (taxes less subsidies) on products	10,057.9	13,129.2
Equals total domestic supply of goods and services (output)	235,158	304,075
Less intermediate consumption	69,761	84,756
Gross value added of the economy	129,862	164,880
Total tourism output	7,713	6,391
Less total tourism intermediate consumption	2,884	2,170
Equals tourism direct gross value added (TDGVA)	4,829	4,221
TDGVA (% of GVA)	3.72%	2.56%
Tourism direct gross value added	4,829	4,221
Plus, tourism share of net taxes on products	264	281
Equals tourism direct gross domestic product (TDGDP)	5,093	4,502
TDGDP (% of GDP)	3.64%	2.53%

Source: National accounts, UBOS

Appendix 6 Table 7.14: Key TSA Indicators

Indicators	2019 (Ugx Billion)	2022 (Ugx Billion)
Inbound Tourism Expenditure (Tourism Exports)	4,580.40	2,571.53
Outbound Tourism Expenditure (Tourism Imports)	1,666.28	1,570.47
Tourism Trade Balance with the Rest of the World (Net Export)	2,914.12	1,001
Domestic Tourism Expenditure	2,965.87	3,675.2
Internal Tourism Expenditure	7,546.27	6,246.77
Other Components of Tourism Consumption	450,650	421.4
Internal Tourism Consumption	0.00	6,668.20
Total Gross Value Added (GVA)	129,861.60	164,880.47
Tourism Direct Gross Value Added (TDGVA)	4,828.99	4,221.33
Tourism Direct Gross Value Added (TDGVA) (% Of GVA)	3.72%	2.6%
Total Gross Domestic Product (GDP)	139,919.54	178,009.7
Tourism Direct Gross Domestic Product (TDGDP)	5,093.15	4,502.3
Tourism Direct Gross Domestic Product (TDGDP) (% Of GDP)	3.64%	2.5%
Total persons employed (millions)	8.63	10.71
Persons directly engaged in producing goods and services purchased by visitors Thousands)	573.5	610.8
Persons directly engaged in producing goods and services purchased by visitors (% of total)	6.6%	5.70%
Total Gross Fixed Capital Formation (GFCF)-000's	33,849.93	40,963.8
Tourism Direct Gross fixed Capital Formation (TGFCF)-000's	6,444.82	7,505.0
Tourism Direct Gross Fixed Capital Formation (% of GFCF)	19.0%	18.3%
Total Collective Consumption	37,480.54	34,967.00
Tourism Collective Consumption (TCC)	903.35	266.69
Tourism Direct Collective Consumption (% of Total Collective Consumption)	2.41%	0.76%

Appendix 6 Table 7.15: 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 7.16: 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 7.17: Tourism Contribution to Taxes in UGX Billions, 2019-2022

Year	Tourism Taxes (UGX Million)	Growth rate	Total Taxes in Uganda (UGX Million)	Growth Rate	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	30.5%	2.1

Source: National accounts, UBOS

Appendix 6 Table 7.18: Percentage contribution to Gross Domestic Product (GDP)

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

Source: National accounts, UBOS

APPENDIX 7: EMPLOYMENT IN TOURISM (TSA TABLE 7)

Appendix 7 Table 8.3: Employment in Tourism industries: 2019-2022

Number of employees by tourism industries	All tourism		Direct tourism	
	2019	2021	2019	2021
Total	720,652	1,032,782	573,508	610,806
Accommodation services for visitors	11,631	44,711	8,425	21,474
Food and beverage serving activities	262,113	387,647	189,874	133,194
Passenger transportation*	413,384	525,979	351,812	419,400
Travel agencies and other reservation services activities	4,005	8,411	2,374	4,436
Other tourism industries*	29,519	66,033	21,022	32,302
Status in employment				
Employees ('000)	277,075	347,714	223,514	216,803
Self-employed ('000)	443,577	685,067	349,994	394,003
Percentage contribution to total employment	8.3%	9.6%	6.6%	5.7%

Source: National Labour Force Survey, 2021

Appendix 7 Table 8.4: Total Employment and Employment in Tourism Industries, Uganda: 2019-2022 (in thousand persons)

TOTAL EMPLOYMENT IN UGANDA	2019	2022
Accommodation services for visitors	8,425	21,474
Food and beverage serving activities	189,874	133,194
Passenger transportation*	351,812	419,400
Travel agencies and other reservation services activities	2,374	4,436
Other tourism industries*	21,022	32,302
TOTAL TOURISM CHARACTERISTIC INDUSTRIES	573,508	610,806

Source: National Labour Force Survey, 2021

Appendix 7 Table 8.5: Total Employment and Employment in Tourism Industries, Percent, Uganda: 2019-2022 (in percent)

TOURISM CHARACTERISTIC INDUSTRIES	2019	2022
Accommodation services for visitors	1.5%	3.5%
Food and beverage serving activities	33.1%	21.8%
Passenger transportation*	61.3%	68.7%
Travel agencies and other reservation services activities	0.4%	0.7%
Other tourism industries*	3.7%	5.3%
Total	100%	100%

Source: National Labour Force Survey, 2021

Appendix 7 Table 8.6: Total Employment in Tourism Industries, by sex and status of employment, 2022

Tourism industries	Number of jobs by status in employment (*)					
	Employees			Self-employed		
	Male	Female	Total	Male	Female	Total
1. Accommodation for visitors	11,583	4,000	15,584	1,824	4,067	5,891
2. Food- and beverage-serving industry	4,390	22,154	26,544	20,500	86,150	106,649
3. Air and Road passenger transport	148,256	910	149,166	268,445	1,789	270,234
4. Water passenger transport	51	-	51	30	-	30
5. Transport equipment rental	-	-	-	-	-	-
6. Travel agencies and other reservation industry	2,700	1,736	4,436	-	-	-
7. Cultural Industry	14,178	6,581	20,759	11,163	-	11,163
8. Sports and recreational industry	203	-	203	-	-	-
9. Retail trade	12	48	60	25	11	36
Total	181,372	35,430	216,803	301,988	92,016	394,003

Source: National Labour Force Survey, 2021

Appendix 7 Table 8.7: Total Employment in Tourism Industries, by Formal or Informal, 2022

Tourism industries	Formal employment	Informal employment	Total
1. Accommodation for visitors	5,204	16,270	21,474
2. Food- and beverage-serving industry	3,432	129,762	133,194
3. Air and Road passenger transport	14,649	404,751	419,400
4. Water passenger transport	-	81	81
5. Transport equipment rental	-	-	-
6. Travel agencies and other reservation industry	-	4,436	4,436
7. Cultural Industry	6,301	25,621	31,922
8. Sports and recreational industry	-	203	203
9. Retail trade of Country-specific tourism characteristic goods	8	88	96
Total	29,594	581,212	610,806

Source: National Labour Force Survey, 2021

Appendix 7 Table 8.8: Total Employment in Tourism Industries, by Education level, 2022

Education level attained	No education	Primary	Secondary	Tertiary and above	Not stated	TOTAL
Tourism industries						
1. Accommodation for visitors	243	4,693	9,625	6,913	-	21,474
2. Food- and beverage-serving industry	12,422	66,975	47,398	5,678	721	133,194
3. Air and Road passenger transport	8,873	224,962	161,707	17,922	5,936	419,400
4. Water passenger transport	-	81	-	-	-	81
5. Transport equipment rental	-	-	-	-	-	-
6. Travel agencies and other reservation industry	-	-	264	4,171	-	4,436
7. Cultural Industry	-	3,562	16,006	12,353	-	31,922
8. Sports and recreational industry	-	-	203	-	-	203
9. Retail trade	12	27	34	24	-	96
Total	21,549	300,301	235,238	47,063	6,657	610,806

Source: National Labour Force Survey, 2021

Appendix 7 Table 8.9: Total Employment and Employment in Tourism Industries, Growth Rates, Uganda: 2019-2022 (in percent)

TOTAL EMPLOYMENT IN UGANDA	2019	2022
Accommodation services for visitors		154.9
Food and beverage serving activities		-29.9
Passenger transportation*		19.2
Travel agencies and other reservation services activities		86.9
Other tourism industries*		53.7
Total		6.5

Source: National Labour Force Survey, 2021

Appendix 7 Table 8.10: Employment of Tourism Industries and Total Employment, 2019-2022

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%

Source: National Labour Force Survey, 2021

Appendix 7 Table 8.11: Total Employment and Employment in Tourism Industries, Percent Shares, Uganda: 2019-2022

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

Source: National Labour Force Survey, 2021

APPENDIX 8: GROSS FIXED CAPITAL FORMATION (TSA TABLE 8)

Appendix 8 Table 9.2: Tourism Gross Fixed Capital Formation by Capital Goods, 2019-2022 in UGX Billions

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

Source: National accounts, UBOS

Appendix 8 Table 9.3: Tourism Gross Fixed Capital Formation by Capital Goods, 2019-2022 (In percent)

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

Source: National accounts, UBOS

Appendix 8 Table 9.4: Tourism Gross Fixed Capital Formation by Capital Goods, 2019-2022 in (Growth Rates)

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

Source: National accounts, UBOS

Appendix 8 Table 9.5: Tourism Gross Fixed Capital Formation and Gross Fixed Capital Formation (GFCF), 2019-2022

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%

Source: National accounts, UBOS

APPENDIX 9: TOURISM COLLECTIVE CONSUMPTION (TSA TABLE 9)

Appendix 9 Table 10.4: 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	Periodicals, Books, and newspapers
Public Administration services related to the distributive and catering trades, hotels, and restaurants	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	Guard and security services
Other education and training services n.e.c	Staff training
	Scholarships
Education support services	Support to tourism training institutes such as HTTI

Source: TSA Committee Estimates, 2023 and various Government Reports

Appendix 9 Table 10.5: Tourism Collective Consumption by Consumption products, 2019-2022 (UGX Billions)

Tourism Industries	2019	2022
85561 Tourism promotion services	188.16	170.56
91136 Public administrative services related to tourism affairs	705.63	83.282
83700 Market research and public opinion poll-	1.2	0.312
91260 Police and fire protection services	3.08	3.634
92920 Educational support services	5.28	8.9
TOTAL COLLECTIVE CONSUMPTION TOURISM	903.35	266.688

Source: TSA Committee Estimates, 2023 and various Government Reports

Appendix 9 Table 10.6: Tourism Collective Consumption by Consumption products, 2019-2022 (In percent)

Tourism Industries	2019	2022
85561 Tourism promotion services	20.8%	64.0
91136 Public administrative services related to tourism affairs	78.1%	31.2
83700 Market research and public opinion poll-	0.1%	0.1
91260 Police and fire protection services	0.3%	1.4
92920 Educational support services	0.6%	3.3
TOTAL COLLECTIVE CONSUMPTION TOURISM	100.0%	100.0

Source: TSA Committee Estimates, 2023 and various Government Reports

Appendix 9 Table 10.7: Tourism Collective Consumption by Consumption products, 2019-2022 (In Growth Rates)

Tourism Industries	2019	2022
85561 Tourism promotion services		-9.4
91136 Public administrative services related to tourism affairs		-88.2
83700 Market research and public opinion poll-		-74.0
91260 Police and fire protection services		18.0
92920 Educational support services		68.6
TOTAL COLLECTIVE CONSUMPTION TOURISM		-70.5

Source: TSA Committee Estimates, 2023 and various Government Reports

Appendix 9 Table 10.8: Tourism Collective Consumption and Government Final Consumption Expenditure (GFCE), 2019-2022

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

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 for the year 2022.

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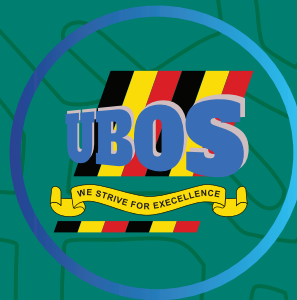
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