

Country Summary
Report: UGANDA,
JANUARY 2022

AFRICAN
NATURE  **BASED**
TOURISM PLATFORM

UGANDA





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SURVEY OVERVIEW: The African Nature-Based Tourism platform has developed a survey (<https://www.research.net/r/nbtes>) to assess the degree to which local communities and small and medium enterprises (SMEs) in the nature-based tourism sector are being impacted by COVID-19. The target audience are community members and SMEs who support the tourism value chain, as suppliers of tourism goods and services, and their associated enterprises, such as lodges, vehicle hire, guiding services, shops, etc. The questions seek to better understand their involvement in conservation and tourism, how the COVID-19 pandemic has affected them, and what their resulting needs are.

These reports present a summary for each country, including an analysis of qualitative data collected through the surveys, and certain quantitative data. The surveys are however more comprehensive than the data presented in these summary reports, so please be sure to visit <https://naturebasedtourism.africa/data> to explore more of the data, and register to access the database for full survey results.

All photographs by Nikhil Advani





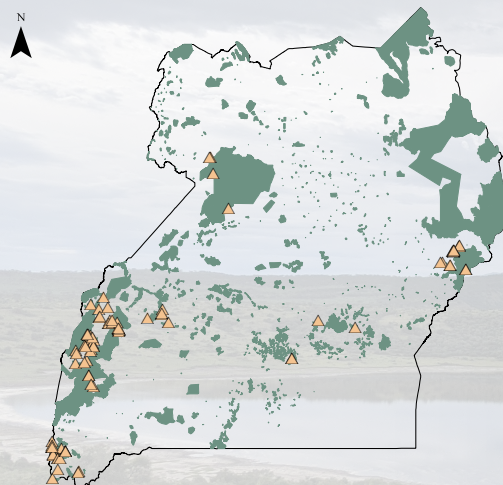
INTRODUCTION

UGANDA IS A MULTICULTURAL COUNTRY with diverse landscapes. It is also home to the highest remaining number of endangered mountain gorillas (Hickey et al., 2019). The great ape is one of Uganda's main tourist attractions, along with Chimpanzees, and more than a thousand bird species (Muresherwa et al., 2020). Tourism in Uganda is an increasingly important contributor to its economy. The 1.5 million international arrivals, combined with a growing number of domestic tourists, generated 7.75% of GDP and 6.7% of total national employment in 2018 (CBI, 2020). COVID-19 has been a disaster for the tourism industry in Uganda. From March to June 2020, tourism suffered a decline of approximately 55%, while other sectors suffered only moderate drops (UBOS, 2020). The travel and tourism sector contributed 2.5% to Uganda's GDP in 2020 (WTTC, 2021).

The African Nature Based Tourism Platform worked with the Uganda Tourism Association. The Uganda Tourism Association is the umbrella association that brings together all tourism associations in Uganda.

SURVEY LOCATIONS

SURVEYED TOURISM ENTERPRISES IN UGANDA



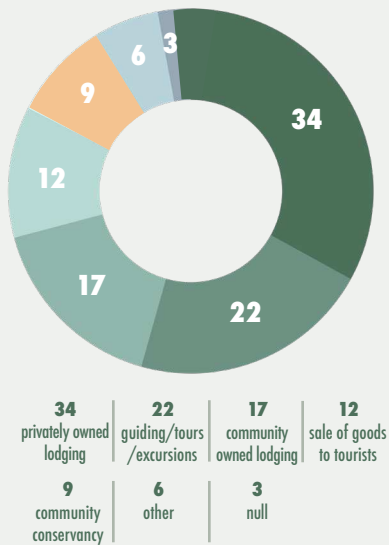
Legend

- ▲ Uganda Tourism Enterprises Surveyed (103)
- Uganda Protected Areas
- Uganda Admin Boundary

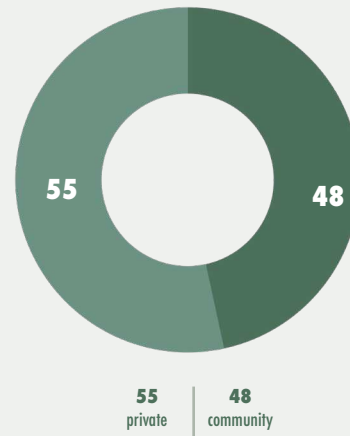


SURVEY RESULTS

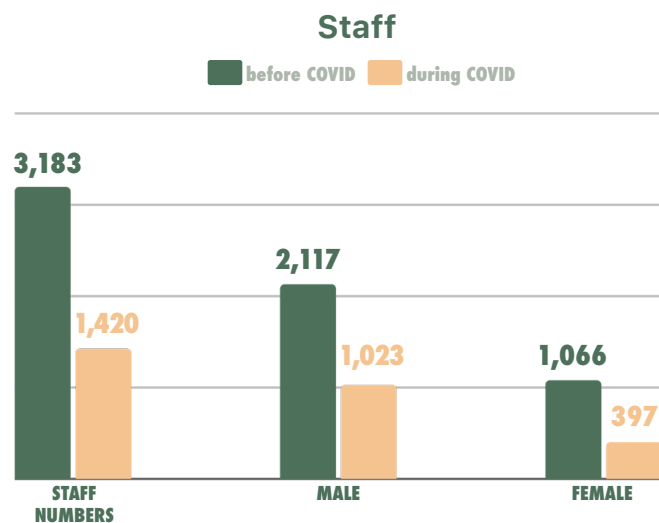
PRIMARY INVOLVEMENT OF THE ENTERPRISE IN NATURE-BASED TOURISM



ENTERPRISE OWNERSHIP

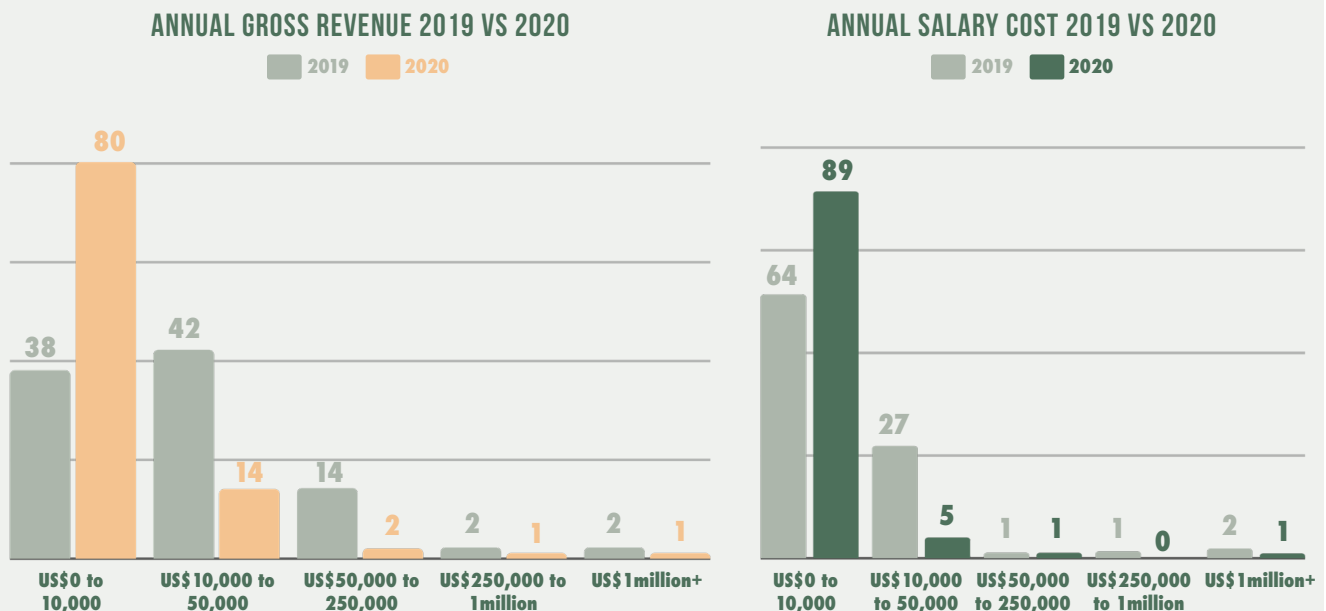


STAFFING BEFORE THE COVID-19 PANDEMIC VS. CURRENT STAFFING



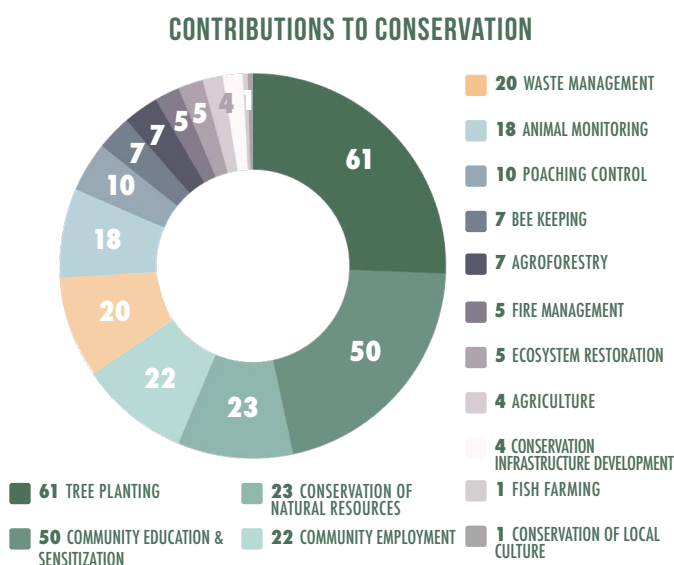


TOTAL ANNUAL GROSS REVENUE (income from selling goods and services before any deductions) THAT SURVEYED ENTERPRISES GENERATE FROM TOURISM



QUALITATIVE SURVEY QUESTIONS

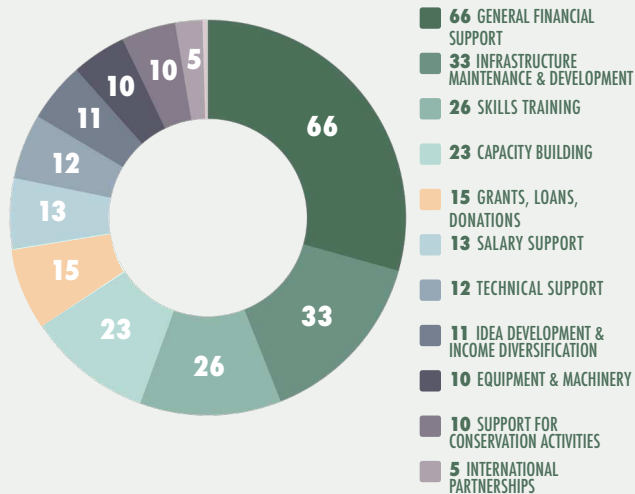
CONTRIBUTIONS TO CONSERVATION (the role of the community/enterprise in the management and custodianship of the land and its wildlife, including any distinguishing features about the area, its wildlife, its people and the role of tourism in its local economy)



ENTERPRISES IN THE SURVEYED areas are heavily involved in tree planting and community education and sensitization towards conservation. These two contributions are common in both community and privately owned enterprises and have a positive impact on the overall conservation of natural resources. Enterprises are also involved in fire management, ecosystem restoration, wildlife monitoring, anti-poaching efforts, and agroforestry. These activities all provide employment for communities through the different projects and activities that they are involved in.



SUPPORT THAT THE INSTITUTIONS NEED



AS THEY WORK TO RECOVER FROM the effects of COVID-19, most enterprises are in need of financial support to cover a number of areas such as staff salaries and setting up new revenue streams. Institutions also need support in capacity development in marketing, enterprise operation skills and fundraising.

ALTERNATIVE NATURE-FRIENDLY SOURCES OF REVENUE, BEYOND TOURISM, THAT THE ENTERPRISES WOULD BE INTERESTED IN EXPLORING



UGANDA'S AGRICULTURAL SECTOR ACCOUNTS for more than half of the country's export earnings (World Bank, 2018). This explains why the majority of enterprises listed crop farming and other agriculture projects as alternative revenue streams. Enterprises are also in favour of Savings and Credit Cooperative Societies (SACCOS), as they promote savings and make credit available to the members whilst also paying a good dividend rate on savings. Forest and agriculture products were also mentioned, with a focus on markets and diversifying already existing products. This included beekeeping and honey production, herb production, and fruit and vegetables.



ALTERNATIVE SOURCES OF REVENUE ENTERPRISES WOULD BE INTERESTED IN EXPLORING

28 CROP FARMING	7 TRANSPORT	2 CRAFTS & ARTS
21 SACCOS	6 FISH FARMING	2 CATERING
15 BEEKEEPING & HONEY PRODUCTION	5 POULTRY	2 FUNDING PROPOSALS
13 TREE PLANTING & PLANTATIONS	4 BRICK MAKING	2 RABBIT FARMING
13 LIVESTOCK REARING	4 MANUFACTURING	1 RECYCLING
9 AGRIBUSINESS/VALUE ADDITION	3 CULTURE & FESTIVALS	1 CREATE A COLLEGE
8 NURSERY, AGRO/ FORESTRY	2 HUNTING & FISHING	1 RETAIL
7 TEA & COFFEE GROWING & SELLING	2 OUTDOOR ACTIVITIES & GAMES	

OTHER COMMENTS

ENTERPRISES WERE AFFECTED IMMENSELY by the COVID-19 pandemic and are in need of financial support and assistance from the private sector and Uganda government to keep their business running. This support includes setting up alternative revenue generating businesses and salaries. Small scale enterprises were the most affected and highlighted the lack of support from the government. Institutions also indicated the need for more effort towards marketing both locally and internationally whilst also encouraging and bringing exposure to cultural tourism. Enterprises have also called on authorities to improve infrastructure such as transport and communication around tourism sites and put in place legislation that supports locally owned tourism enterprises. Lastly, there is a growing need to work with communities in sensitizing them to conservation issues, in particular sustainable agricultural practices.