

Country Summary
Report: UGANDA,
2023

AFRICAN
NATURE  BASED
TOURISM PLATFORM

UGANDA





Country Summary Report: UGANDA, AUGUST 2023

SURVEY OVERVIEW: The African Nature-Based Tourism Platform developed a survey to assess the degree to which local communities and small and medium enterprises (SMEs) in the nature-based tourism sector were 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.

All photographs by Jjumba Martin.





INTRODUCTION

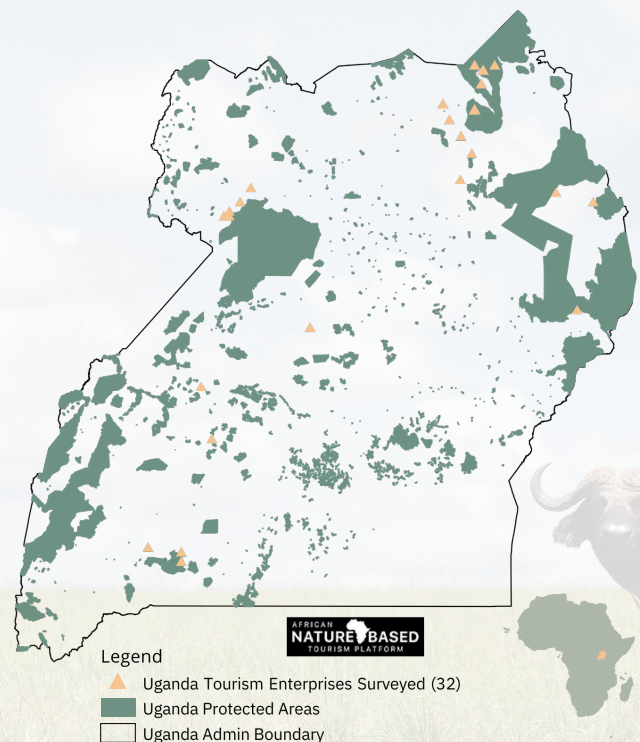
UGANDA IS A MULTICULTURAL COUNTRY with diverse landscapes. It is also home to the highest remaining number of endangered mountain gorillas (Hickey et al., 2019). The great ape is one of Uganda's main tourist attractions, along with Chimpanzees, and more than a thousand bird species (Muresherwa et al., 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 Uganda's GDP and 6.7% of total national employment in 2018 (CBI, 2020). COVID-19 had a significant impact on the tourism industry. According to the UNWTO, international tourist arrivals fell by 81% in July 2020 compared to July 2019. By June 2020, the Ugandan government reported that 70% of tourism workers had lost their jobs and 91% of tourism entities had downsized their workforce. In 2021, the travel and tourism sector contributed only 2.5% to Uganda's GDP (WTTC, 2021). These numbers have since improved. In 2022 the WTTC reported a 7.6% GDP contribution from the travel and tourism sector. However, the immediate impact of COVID-19 on the tourism industry revealed the vulnerability of communities and businesses that rely on tourism as a sole revenue generator.

To conduct this survey, the African NBT Platform worked with the Umoja Wildlife Conservancies of Uganda (Umoja). Umoja is the first umbrella community-based natural resource management (CBNRM) association of its kind in Uganda, representing conservancies country-wide.

SURVEY LOCATIONS

IN 2022, THE AFRICAN NATURE BASED TOURISM PLATFORM worked with the Uganda Tourism Association (UTA) to collect data from 103 tourism enterprises in Uganda. These surveys focused mainly on tourism operators and private enterprises. In 2023, the African Nature Based Tourism Platform partnered with Umoja to conduct data collection with a focus on community conservancies.

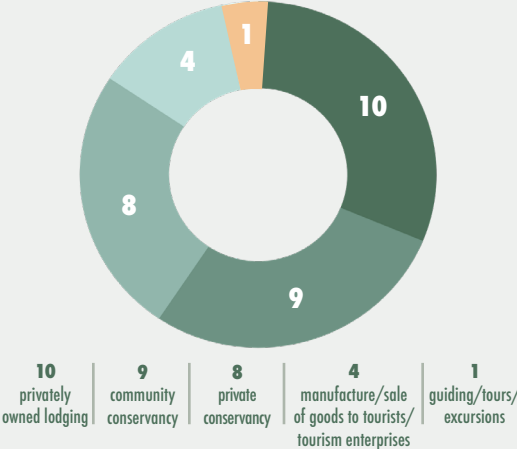
Between March 2023 and May 2023, Umoja conducted 32 surveys. Some interviews were conducted with individual representatives and others were the result of focus group discussions with community members. The map to the right indicates the locations of all 32 surveys in addition to their proximity to established protected areas in Uganda. These 32 interviews are a representative sample that provides insight on how COVID-19 impacted local communities and SMEs.



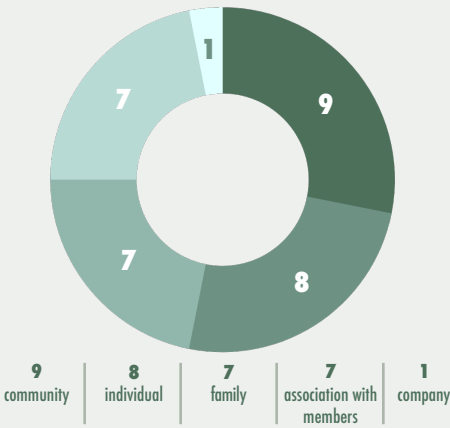


SURVEY RESULTS

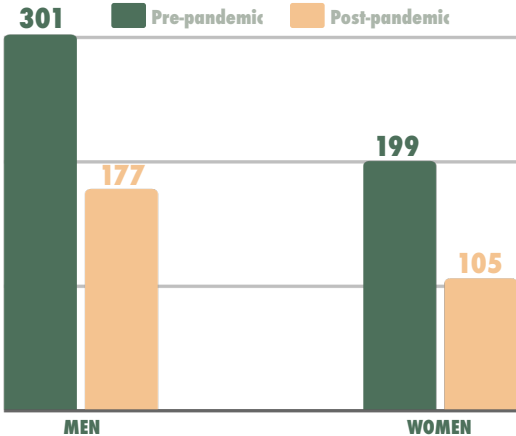
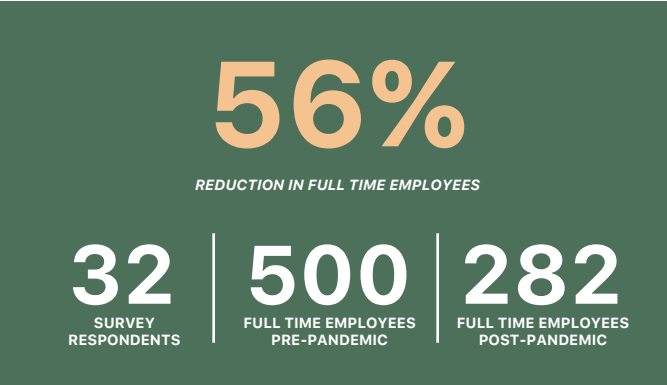
PRIMARY INVOLVEMENT IN THE NATURE-BASED TOURISM INDUSTRY



PRIMARY OWNERSHIP OF ENTITY

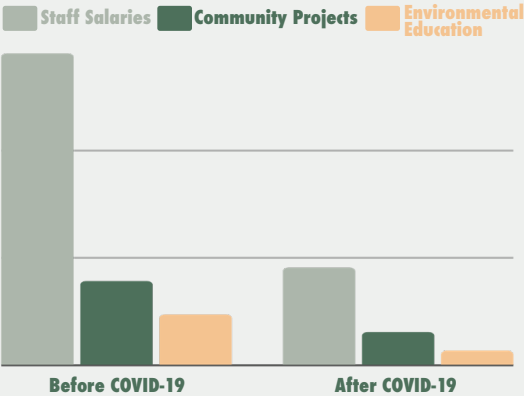


COVID-19 IMPACTS ON STAFFING

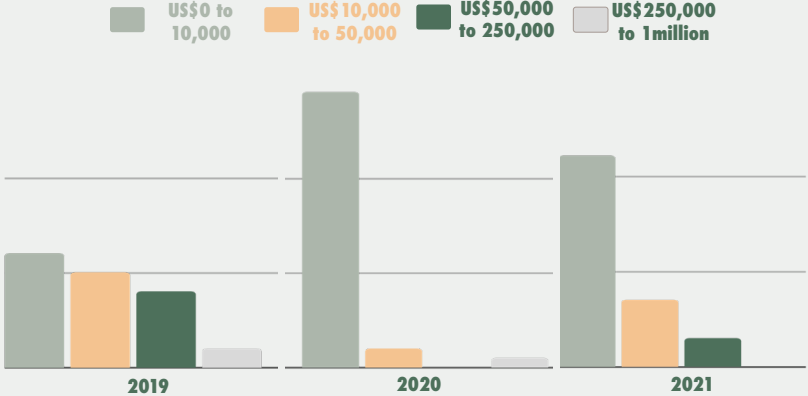


FUNDING & REVENUE

ANNUAL FUNDING AVAILABLE FOR STAFF SALARIES, COMMUNITY PROJECTS AND ENVIRONMENTAL EDUCATION

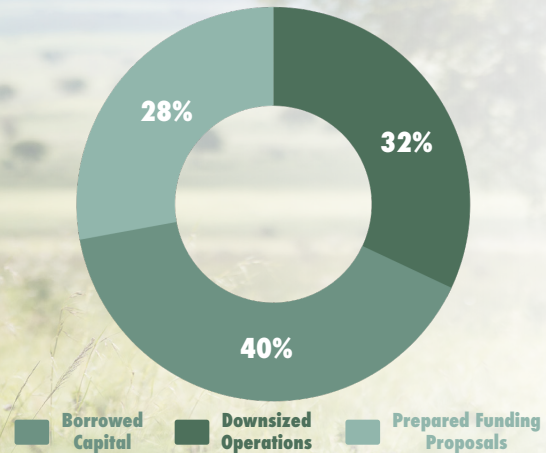


TOTAL ANNUAL GROSS REVENUE





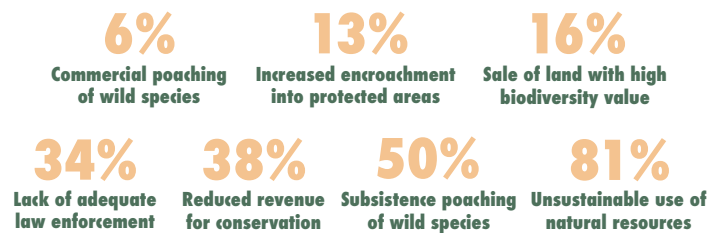
MEASURES IN PLACE DUE TO COVID-19



COMMUNITY CONCERNS FOLLOWING COVID-19



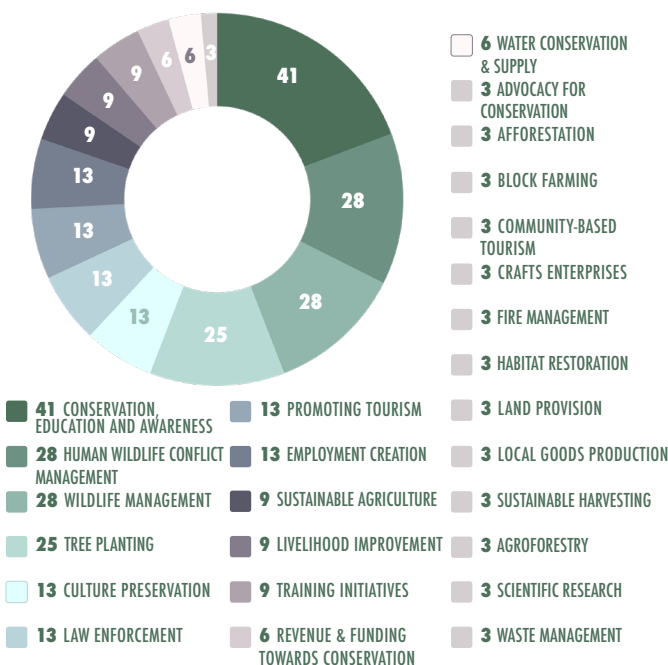
CONSERVATION CONCERNS FOLLOWING COVID-19



QUALITATIVE SURVEY QUESTIONS

CONTRIBUTIONS TO CONSERVATION survey respondents' 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 the local economy).

CONTRIBUTIONS TO CONSERVATION



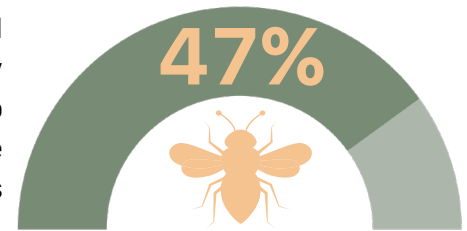
SURVEY RESPONDENTS ARE HEAVILY INVOLVED in conservation education, human wildlife conflict (HWC) management, and general wildlife management. Tree planting, cultural preservation, and law enforcement were also top contributions. These contributions are common in both community and privately owned conservancies as well as SMEs and have a positive impact on the overall conservation of natural resources. Uganda has been ranked among the top ten countries in the world in terms of animal and plant diversity and is especially rich in mammalian species (AWF, 2021). As shown, conservancies and nature-based tourism enterprises play a key role in protecting this biodiversity, particularly through increasing conservation awareness and goodwill towards wildlife among local communities. A loss in tourism revenue significantly impacts these enterprises' ability to make these contributions. As they work to



recover from the effects of COVID-19, most enterprises need financial support to cover a critical operating cost (84% of respondents). Institutions also need support for capacity building in conservation, business, and entrepreneurship (53%). Infrastructure development was also another highly reported need (44%).

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

FOREST AND AGRICULTURAL PRODUCTS were a top mentioned alternative revenue source. This includes beekeeping and honey production (47%), tree planting (41%), livestock rearing (38%), crop farming (34%), poultry farming (34%), and fish farming (25%). These responses are not surprising as Uganda's agricultural sector accounts for more than half of the country's export earnings (World Bank, 2018).



ALTERNATIVE SOURCES OF REVENUE THAT ENTERPRISES WOULD BE INTERESTED IN EXPLORING

15 BEEKEEPING & HONEY PRODUCTION	2 FISHING	2 DAIRY FARMING & PROCESSING	1 WILDLIFE RESEARCH & STUDIES
13 TREE PLANTING	2 FOOD CHAIN VALUE ADDITION	1 GRASS HARVESTING	1 UNSPECIFIED FARMING
12 LIVESTOCK REARING	2 TREE NURSERY	1 LEASE OF LAND TO BUSINESSES	1 TRANSPORTATION SERVICES
11 POULTRY	2 VILLAGE SAVINGS & LOAN ASSOCIATION	1 CHARCOAL PRODUCTION	1 SUNFLOWER OIL PROCESSING
11 CROP FARMING	2 CULTURAL TRADE	1 OFFERING TAILORING SERVICES	1 SPORTS ACTIVITIES
8 FISH FARMING	2 COLLECTING & PROCESSING HERBAL MEDICINES	1 BAKING BUSINESS	1 PROVIDE WELDING SERVICES
3 CARBON CREDITS	2 CRAFTS & ARTS PRODUCTION & SELLING	1 HEALTH & WELLNESS CENTER SERVICES	1 OPEN A SALON
2 ALTERNATIVE ENERGY PRODUCTION	2 FEEDS & FODDER PRODUCTION	1 CATERING BUSINESS	

OTHER COMMENTS

COMMUNITIES AND ENTERPRISES IN UGANDA were immensely impacted by the COVID-19 pandemic. Financial support and assistance from the private sector, foundations, and the Ugandan government are required to help communities and SMEs build resilience towards future shocks and stressors. This support can include setting up alternative revenue generating businesses, capital for critical operating costs such as salaries, or capacity building to encourage more sustainable conservation. Community and privately owned conservancies were heavily affected, highlighting the ongoing threat to conservation in their regions due to a loss in tourism revenue. Communities and SMEs also called on authorities to improve infrastructure such as transportation and communication around tourism sites. Lastly, there is a growing need to work with communities in sensitizing them to conservation issues, particularly sustainable agricultural practices.

References: 1. Hickey JR et al., 2019. Bwindi Sarambwe 2018 Surveys: monitoring mountain gorillas, other select mammals, and human activities. GVTC, IGCP & partners, Kampala, Uganda, 40p. 2. Muresherwa G, Amomy I, Iwu CG, and Dube CN, 2020. The impact of mountain gorilla tourism: A residents' perspective. 9: 1-18. 3. The Centre for the Promotion of Imports from developing countries (CBI), 2020. Analysis of the Tourism Value Chain in Uganda Final Report. Acorn Tourism Consulting Ltd. 4. World Travel and Tourism Council (WTTTC), 2021. Travel and Tourism economic impacts reports – Uganda. 5. World Travel and Tourism Council (WTTTC), 2023. Uganda factsheet. 6. African Wildlife Foundation (AWF), 2020. Uganda Strategic Plan, 4p.



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This publication was funded/co-funded by the Global Environment Facility. Its contents are the sole responsibility of the African Nature Based Tourism Platform and do not necessarily reflect the views of the GEF Secretariat