PILOT STUDY ON THE STRUCTURE
AND ORGANISATION OF TOUGHER
IN KENYA (African)

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Those papers are prepared as a basis for Seminar discussion. They are not publications and are subject to revision.
This pilot study is part of a more general study of the tourist trade in Uganda, being undertaken on behalf of the Uganda Development Corporation "in order to develop a commercial policy for the tourist and hotel interest of the UDC." It is with that in view that it was found 'essential to have a clear understanding of the structure and organisation of the existing tourist industry in Uganda." The whole survey, therefore, seeks to 'identify this structure and organisation, to establish the relationship between the component parts of the industry and to assess the financial benefits accruing directly to Uganda.'

It is essentially a fact-finding pilot study, which a preliminary survey of this kind requires. No attempt is made at this stage to formulate any theoretical framework of economic analysis.

In this part of the pilot survey, attention has been focussed on carriers - airlines and charter companies to determine their contribution to the promotion of tourist traffic in the country.

The work is divided into the following headings:

1) Methodology.
2) Tourist traffic by airlines and charter companies.
3) The potential for the tourist trade in Uganda.
4) Obstacles to tourism and,
5) Measures to remove the major constraints to tourism.

1. METHODOLOGY: A set questionnaire was formulated for the airlines and air charter companies, and required interviews with company executives. The questionnaire and the responses to it have been embodied in tables 1 to 3 (for the answers obtained from questions 2 and 3), and in the appendix (questions 5 - 17) in a matrix form.

I am indebted to I.J. Ojow who was largely responsible for the projections and, for his other suggestions, as well as to Mr. J. Hutton for his additional comments. Any
Immigration Office records—records which relate to only those who do not choose to evade customs officials, or who fill the necessary immigration forms.

The majority of the airlines do not operate charter flights, which they consider to be inimical to their regular flights, because of their competition with scheduled runs, as well as to the promotion of tourism. Charter flights bring about a great reduction in fares. They are said to provide artificial peak and off peak periods by restricting visits to Uganda, to periods of charter, where as, in their absence, tourists could spread their visits over the whole year. 75% of the airlines interviewed, do not operate charter flights. Those who do, do so occasionally, principally to bring in tourists, students, businessmen, players, and East Africans returning home, while a very small proportion of the firms not engaged directly in charter service, do so through their agents.

An important part of the work of the airlines in their promotion of tourism is the arrangements they make for inclusive or package tours, either by themselves or through tour companies. Package tours are tours in which bulk arrangements are made for tourists, including flight, board and lodging, as well as for transport and guided tours to tourist centres in the country. For such inclusive tours, the tourists are given between 34% and 50% reduction in fares for a minimum of fifteen passengers.
The consensus of opinion is that Uganda possesses tremendous potential for the tourist industry (q.16), and that an adequate share of the tourist trade is not being realized. This has led to a great deal of optimistic guesses not based on any scientific study but, perhaps, on the basis of the long-standing experience of the airlines. The country's scenic beauty (landscape and vegetation) wild life, climate and the culture of the people, all offer fantastic scope for tourism. It is felt that there has been a definite build-up in the number of people wishing to visit East Africa in general, most of whom could be attracted into Uganda. In particular, the inauguration of "Jumbo Jets" in the next few years, with a capacity for up to 400 passengers is likely to reduce costs considerably and therefore, offer an inducement to people to visit East Africa. Up to two million Britons, for example, who visit Spain annually, could, it is optimistically hoped, be diverted to East Africa, provided adequate facilities and incentives are available. Between September and March, it is estimated that about 150,000 British would like to visit East Africa. More specifically, Uganda, in five years' time, is capable of having up to 100,000 tourists per annum.

To study the trend of the number of tourists over time, a simple linear regression was fitted into the available data in table 3.

\[ T = a + bt \]

Where \( T \) = the number of tourists and \( t \) = time.

This gave the following results:

\[ T = 646 + 1087t \]

This indicates that for the period in question (1960 - 1968), about 4,087 additional tourists were coming to Uganda each year.
Thus, unless the trend drastically changes during the near future, the figure of 100,000 tourists per annum, as predicted by some airlines, seems an over estimation. It is however, not clear whether this prediction took into consideration the number of tourists coming by other routes, or whether it was confined to air-borne tourists.

On the whole, the increase in the number of tourists, as shown in Table 3 does bear evidence of great possibilities for the tourist industry. As most bookings to Uganda, are said to be cancelled during the peak periods, owing to inadequacy of hotel accommodation, then the removal of hotel bottleneck is one of the factors likely to contribute towards realisation of the potential the tourist industry possesses.

4. OBSTACLES TO TOURISM

The following factors are considered to be major bottlenecks to the development of tourism in the country:

1) Insufficient publicity of the country's tourist potential abroad.
2) Inadequate transport and communications facilities.
3) Immigration procedure - visa requirements for potential tourists from Uganda's Ambassads abroad.
4) Inadequacy of hotel accommodation in National Parks and lodges during the peak periods of tourism.
5) Non-accessibility of Lake Victoria for swimming and other sports due to bilharzia infestation.
3) EXPANSION OF HOTEL ACCOMMODATION:

The general experience is that most Uganda hotels have a low rate of bed occupancy, when taken on a whole year basis. During peak periods, however, hotel accommodation, especially in the lodges and national parks, is a real bottleneck, and tour operators arranging inclusive tours, having failed to obtain enough hotel accommodation for their clients, have had to lose a good number of tourists to Kenya, whereas, during the off-peak periods a great number of beds are empty. One of the remedies for this uneven tourist traffic into the country, it is suggested, is to reduce hotel rates as an incentive scheme during the period of small inflow of tourists (May - Oct.), i.e. no work has yet been done on hotel accommodation in relation to the amount of tourist inflow, one cannot say with certainty, whether the present hotel facilities are adequate or not. Judging from the expenditure patterns (again something yet to be investigated) of the tourists, based on the types of hotels they stay in, it would appear that any expansion in hotel accommodation, should be in the direction of medium-priced hotels to cater for people in the middle income bracket, as these people constitute the largest number of visitors to the country.

4) PROMOTION OF RECREATIONAL FACILITIES:

Things that are considered would meet the tastes of tourists include the provision of dancing entertainments in the hotels, parks and lodges, the provision of swimming facilities, e.g. in Lake Victoria, and the development of Toroko Village for fishing. However, in respect of developing Lake Victoria as a sports resort, it is felt that the possibilities of greater attraction to tourists, of swimming in it, or using it for other sports, are marginal, because tourists would prefer going to the coast for that purpose. The costs of getting rid of bilharzia in the Lake may outweigh the potential advantages it would offer when rid of the infestation.
traffic by the airlines if adequate facilities are
provided. In this connection, expansion of airport
facilities to cater for increased traffic ranks equally
high on the list of priorities.

On the whole, no really useful commercial policy
can be formulated at this stage, until all the component
parts of the industry have been investigated.
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| 2. 092 | Questionnaire | Airlines | Good Nos. | No, all, in the last years, in the past only on the first two, Uganda now has a greater attraction because advertising is done not in terms of any particular promotion pamphlets, and outdoor advertising | Couldn't tell | Couldn't tell | All | From enquiry made to our offices by | b.o.e., tour, estat tour, to whom we sent direct
FOOT NOTES:


2. Ibid.

3. Ibid.

4. The peak periods are said to be between October and April for visitors from America and Europe, while the off-peak season is from May to October. It is however, difficult to verify this information, unless figures are available to show places of origin of the tourists.

5. Verbal communication; said to be an estimate by the British Travel Agents, August 1968.

6. Tourists do not, usually, like to declare their incomes.

7. A medium-priced hotel is considered to be one in the region of Shs 45/- to Shs 50/- (b.b.).
Great possibilities for tourism in Uganda, adequate percentage of the potential is not being realised.

Great potential for tourism in the country. Scenic beauty (landscape & vegetation), wildlife climate & culture of the people, all offer fantastic scope for tourism.

It has got a lot of potential.

Potential is unlimited. Between Sept. & March, about 150,000 British would like to visit E.A. (Association of British Travel Agents, August, 1968.)

Tremendous. Many places in Uganda offer enormous attractions for tourism, e.g. Semliki plains in Toro, fishing at Lake Albert at Toroko, the Mountain Pass and the hot springs in Toro.

(i) Adequate publicity of the country abroad giving information that will acquaint potential visitors with all the necessary knowledge of the country - life, weather, flora and fauna. (ii) Night life - social entertainments in the evenings. Hotels to have something of social life that gives guests some rest. (iii) Expansion of present tourist accommodation in the country. (iv) Provide some incentive schemes, e.g. discount on travelling rates, rebate in fuel cost - will make tourists stay a little longer than would be the case without such incentives. Further inducements to make travelling about the country more convenient, e.g. in Italy, a tourist is given a ticket which enables him to travel about on any train without the necessity to buy a ticket for each journey. (v) Price control of essential goods demanded by tourists to avoid exploiting the tourists by unscrupulous traders - such measures also appropriate in hotels and restaurants. (vi) Limitation to be placed on charter flights which restrict visits to Uganda to periods of charters, whereas in the absence of charter flights tourists can spread their visits over the whole year. Charter flights provide artificial peak and off peak periods. Govt. can do this by refusing permission for charter flights. (vii) Reduction in airfares.

(i) Improve airport facilities at Entebbe to cope with large numbers of disembarking passengers, e.g. an increase in the number of Immigration officials, to speed up immigration formalities. (ii) More emphasis on overseas publicity of the country. (iii) Improvement in transport and communications. (iv) Emphasis to be on attracting middle-income tourists by providing such facilities as can be paid for by those in the middle-income bracket.

(i) Need improvements, e.g. the road to Semliki plains is always in a bad state of repairs and is 'treacherous' during the rains. (ii) Development of facilities for fishing at Toroko village, where some Nile Perch is said to weigh between 150 and 200 lbs. Such facilities will include provision of fishing hooks and boards, accommodation for fishing enthusiasts who may like to stay there overnight. (iii) Some refreshment facility to be made available at the hot springs area of Toroko - cold drinks and snacks - which make visitors to the hot springs stay a little longer. These hot springs are said to be unique, e.g. eggs and potatoes could be boiled in them in a matter of minutes. (iv) More dynamic and aggressive publicity of the country overseas.
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**Meeting Agenda**

- **Time:** 10/09/19, 9:00 AM
- **Location:** T/L
- **Agenda Item:** Discuss the budget for the upcoming fiscal year.
- **Action Item:** Prepare a presentation on the budget for the board's approval.

**Follow-Up**

- **Date:** 10/09/19
- **Time:** 10:00 AM
- **Location:** T/L
- **Details:** Review and discuss the budget presentation.
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