

(831)

EDRP NO. 165

PILOT SURVEY ON THE STRUCTURE  
AND ORGANISATION OF TOURISM  
IN UGANDA (AIRLINES)

O. Okereke

Makerere Institute of Social Research

These papers are prepared as a basis for Seminar discussion. They are not publications and are subject to revision.

INSTITUTE  
OF  
DEVELOPMENT  
STUDIES  
LIBRARY

PILOT SURVEY ON THE STRUCTURE AND ORGANISATION OF  
TOURISM IN UGANDA: \*

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".<sup>1</sup> It is with that aim in view that it was found "essential to have a clear understanding of the structure and organisation of the existing tourist industry in Uganda."<sup>2</sup> 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."<sup>3</sup>

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. Of the fifteen airlines registered in the country, twelve

\* I am indebted to Mr. F. 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 imperfections in this paper are entirely mine.

(figure 3) of the Ministry of Planning are based on 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.<sup>4</sup> 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.

STATISTICS OF AIR PASSENGER TRAFFIC: UGANDA TABLE 2 (a)  
 DISEMBARKING PASSENGERS AS A % OF TRANSIT PASSENGERS: TRANSIT PASSENGERS AS A % OF DISEMBARKING PASSENGERS:

Year	ALL AIRLINES					
	Disenbark	Transit	%	Transit	Disenbark	%
1965	33799	62294	54.3	62294	33799	184.3
1966	41288	83818	49.3	83818	41288	203.0
1967	58533	102486	57.1	102486	58533	175.0
1968	64230	115178	55.8	115178	64230	179.3

Year	DISEMBARKING PASSENGERS AS A % OF ALL PASSENGERS				TRANSIT PASSENGERS AS A % OF ALL PASSENGERS			
	Disenbark	All Pass.	%	Transit	All Pass.	%	Transit	All Pass.
1965	33799	96093	35.2	62294	96093	64.8		
1966	41288	125106	33.0	83818	125106	70.0		
1967	58533	286125	20.5	102486	286125	35.8		
1968	64230	179408	35.8	115178	179408	64.2		

3. THE POTENTIAL FOR TOURISM IN UGANDA:

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 realised. 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.<sup>5</sup> 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 1,087 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 arealisation of the potential the tourist industry possesses.

4. OBSTACLES TO TOURISM:

The following factors are considered to be major bottle-necks to the development of tourism in the country:-

- 1) In sufficient 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 Ambassies abroad.
- 4) Inadequacy of hotel accommodation in National Parks and lodges during the peak periods of tourism.
- 5) Non-usability 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.). As 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<sup>6</sup> (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.

QUESTIONNAIRE	10	11	12	13	14	15
AIRLINES						
CODE NOS.						

3. 032	No, all, in the last years. In the past only on the first two, Uganda now has a greater attraction	Couldn't tell because advertising is done not in terms of any particular	Couldn't tell	All	b, c & e, tour promotion pamphlets, and outdoor	From enquiries made to our offices by potential tourists to whom we sent direct
--------	--	--	---------------	-----	---	---

FOOT NOTES:

1. Draft Memorandum on the Structure and Organisation of the Tourist Industry in Uganda - Terms of Reference for a Proposed Study, April 1969, P. 1.
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/- Shs:50/- (b.b.).

QUESTIONNAIRE:  
AIRLINES CODE  
NOS.

16 What, from your experience is the potential for the tourist industry in Uganda?

17 What measures would you advise, to realise this potential?

1. 030 Great. Definite build-up in the number of people wanting to come to E. Africa.

Lower airfares - about 50% reduction - already done, has increased the percentage of tourist traffic coming into East Africa. More of package tours are now being arranged. (ii) Improvement on the existing hotel facilities, rather than increasing capacity. (iii) Improvement in the means of communications between Kampala and hotels & lodges in the Natural Parks - Standard of the roads to be improved. (iv) Reasonably priced hotels & lodges. Any more hotel development to be based on medium-class hotels to cater for the middle-income group. There is the possibility of directing tourist traffic from the traditional holiday resorts like the West Indies, Spain etc. to E.A. because of lower comparable costs. (v) More publicity of the country abroad - Tourist Board.

2. 031 Great. Inauguration of "Jumbo Jets" in the next few years, with capacity for up to 400 passengers is likely to reduce travel costs considerably. Up to two million Britons who visit Spain yearly could be diverted to E.A. and Uganda.

(i) Expand medium - priced hotels. At the moment, tour operators require an increasing number of beds. If Uganda hotels cannot meet fully these requirements, the tour operators have a tendency to omit Uganda completely from their programmes. Hence Uganda is unable to sell even her small number of beds and has to be content with just passing traffic. (ii) Open up more areas of tourist attractions, such as the Kabale area and the Mountains of the Moon, both of which are reputed for their scenic beauty.

3. 032 Enormous potential.

(i) Govt. to step up publicity of country's potential for tourism through its embassies abroad and through the recently created Tourist Board. (ii) Reduction of airfares - already down by 45% - 50% - an incentive to potential tourists. (iii) Provision of more medium-class hotel accommodation, as a greater number of tourists are in the middle-income group (medium-class hotel is one in the region of Shs:45/- to Shs:50/- b.b.). Such a move will result in a reduction in the overall charges to tourists by tour operators operating inclusive tours, although it will mean lower profit margins for the tour operators as a result of reduced commissions from hotel accommodation charges. (iv) Developing Lake Victoria. But possibilities of greater attraction to tourists, of swimming in the lake or using it for other sports are marginal, as tourists would prefer going to the Coast. Cost of getting rid of Bilharzia in the Lake may outweigh the potential advantages the Lake would offer when it is rid of the infestation.

4. 033 Uganda, in five years' time, is capable of having up to 100,000 tourists per annum, provided adequate facilities are available.

(i) Sell Uganda abroad as a separate entity, distinct from Kenya or Tanzania. More vigour in advertising and publicity. Image of the country to be promoted abroad by the Govt. - country not yet in world news, except the Pope's visit which offers a big incentive for its tourists to visit the country - many Frenchmen e.g. on hearing of the Pope's visit began to look up Uganda on the world map. (ii) More dynamism by Govt. Politically & socially. More political stability is not enough incentive for tourism. Country to take a stand on certain international issues or adopt domestic policies that draw world attention, e.g. Kenya Mau Mau put Kenya on the map; Tanzania's recognition of Biafra and Nyarere's adoption of Socialism brought world focus on Tanzania. (iii) Promotion of things of local flavour - not bastardized or mixture of alien and local culture. Thus, real folk lore, country's art treasures and cultural heritage of the people, like the heart-beat of Africa should be shown to tourists while in the country and will serve as publicity media.

5. 034 Tremendous potential exists.

(i) Step up publicity of the country abroad. Little is known about Uganda abroad in terms of tourism. Country should be advertised abroad as a separate entity, as was done in Ethiopia, a step which has increased tourist traffic into Ethiopia. Publicity should emphasize on Uganda's scenic beauty, friendliness of the people, and accommodation facilities available. (ii) Minimize bottlenecks in the potential tourists immigration requirements and formalities, e.g. abolition of the long process of obtaining visas for entry into Uganda. Simplified procedure in Ethiopia now - tourists now obtain visas at the Addis - Ababa Airport without first going through the Ethiopian Ambassadors abroad.

6. 035 A big potential exists.

(i) Provision of adequate hotel accommodation in areas of tourist attractions. During peak periods of tourism (Oct. - April for American & European tourists) The maximum length of time spent by tourists in Uganda is 7 - 8 days, out of which only two are spent in Kampala or Entebbe and the rest is spent in the N. Parks etc. Saturation point is reached during these peak periods especially in Para & Mweya Lodges and a great number of tourists is siphoned off to Kenya & Tanzania. (ii) Reduction of hotel rates during off peak periods (i.e. May - Oct.) Bed occupancy is low if spread over the whole year. (iii) Reduction in airfares, as already done for a minimum of 15 persons. (iv) More support from Govt. for the tourist industry by exploiting to the full all media of publicity and information - posters, magazines, radio, T.V. and newspapers at home and abroad. (v) Closest co-operation and collaboration between the Ministry of Information & Tourism and the International Airlines for more effective advertisement of the country abroad; the new Tourist Board to coopt some of the airline managers into its membership.

7. 036 Unlimited potential

(i) Step up publicity of the country. Tunisia, has, for e.g., flooded America and Europe with posters and magazines, depicting its people, flora & fauna - on the whole the colour of Tunisia, so should Uganda.

QUESTIONNAIRE: 16.  
AIRLINES CODE  
NOS.

17.

-20-

037	for tourism in the country.	(iii) More comprehensive advertising programme.
9. 038	Great possibilities for tourism in Uganda. adequate percentage of the potential is not being realized.	(i) Set up tourist agencies for purposes of publicity and propaganda, in countries where tourists are expected to come from - information media to be more developed and strengthened. Any information on Uganda must be up-to-date, e.g. information about health facilities, accommodation and kinds and cost of meals, taxis and busfares, prices of essential goods etc. (ii) Provide access to remote places, like Karamoja, where tourists can see things of local flavour, quite different from their traditional and familiar scenes.
10. 039	Great potential for tourism in the country. Scenic beauty (landscape & vegetation), wild life climate & culture of the people, all offer fantastic scope for tourism.	(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 fun. (iii) Expansion of present hotel 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.
11. 040	It has got a lot of potential.	(i) Major advertising programme for Uganda products abroad, not only wild life but also Local Crafts. (ii) Reduction in airfares.
12. 041	No answer	No answer.
13. 042	Potential is unlimited. Between Sept. & March, about 150,000 British would like to visit E.A. (Association of British Travel Agents, August, 1968.).	(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.
14. 043	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) Road improvements, e.g. the road to Semliki plains is always in a bad state of repairs and so is "treacherous" during the rains. (ii) Development of facilities for fishing at Toroko village, where some Nile Perch is said to weigh between 100 and 200 lbs. Such facilities will include provision of fishing hooks and boards, accommodation for fishing enthusiasts who may like to stay there over night. (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.

AIRLINES CODE NOS.

3. 032	a) Britain b) France: C.1- \$300,000, to sell E.A. on the whole	Couldn't tell	All	tentative travellers with brochures en- closed	who've read our newspaper, & T.V. advertisements.	
4. 033	Yes, a) & (c)	Couldn't tell	All	a) (i) Radio & T.V. b) Immediate interest (ii) Newspapers & periodicals give more specific de- tails to potential tourists (iii) Any other, e.g. brochures & tour promotion pamphlets, which are the better means of advertising becau- se they make dir- ect appeals.	By facts & experience, opti- mum results are obtainable when all the media of infor- mation have been followed in their sequence. None can give the best results in isolation.	
5. 034	Yes, (c) Time limitation restricts tourists to the Murchison falls N.P. which is more publicised than the other parks, has better accommodation & is the nearest.	Couldn't tell	Couldn't tell	b, c, d and e. c) Consists of airlines memos & brochures to acquaint pot- ential travellers with our ser- vices & flights to Uganda.	Has a direct appeal to potential travellers.	
6. 035	Yes, in order of preference: Uganda Kenya & Tanzania. In Uganda, prefer- ence is for the Murchison Falls, N.P. because of the falls consi- dered to be one of the wonders of the world ra- ther than for the game.	Couldn't tell	Couldn't tell	In order of impor- tance & optimal results. (i) Any other - pamphlets like tour promotion brochures. (ii) Periodicals occasionally in U.S.A. (iii) Newspapers occasionally in Europe; (iv) T.V. in U.S.A., Europe & Canada; (v) Radio used very little in Europe.	e) Any other - tour promotion brochures whose contents make direct appeal to potential tourists who, then make further enquiries from our offices.	
7. 036	No, all	Impossible to give	Not applicable. We have no agents doing advertising work for us.	All	All	Couldn't assess.
8. 037	No, all usually tourists take ad- vantage of the fa- ct that no ex- tra charge is levied for tra- velling through- out E.A. & so like to visit all the E.A.	Couldn't say	Couldn't say	b, c, & d	b, c, & d	We have people asking for more information in connec- tion with our advertisements in newspapers & periodicals.

NOS.

9.	<p>038</p> <p>No, all. Tourists want to see the whole of E.A. as an entity. No extra cost if they travel through Dar-es-Salaam or Nairobi to Entebbe, but pay extra 10% of cost if they first land in Entebbe</p>	<p>Couldn't say exactly, but probably, in terms of thousands of dollars to advertise Africa as a whole, by our Head Office which does the advertising work. I don't think in terms of individual countries.</p>	<p>All</p>	<p>e) Any other-trade magazines and pamphlets.</p>	<p>They make direct appeals on people.</p>	
10.	<p>039</p> <p>Yes, about 90% of the tourists prefer (a) or (b) plus (c). Only about 10% like all. (d) Most tourists want to see as much of Uganda as possible &amp; little of the other two countries. They usually stay for 2 to 3 weeks.</p>	<p>Couldn't tell</p>	<p>Couldn't tell</p>	<p>All. But our publicity is done mainly by our agents - S.M. Benson of Eastern Africa, who have long period of experience on advertising.</p>	<p>A combination of all. Their use at particular times depends upon when people avail themselves of the facilities, e.g. between March &amp; April, the press, rather than the T.V. or cinema, is used because people don't use them then. Between May &amp; June the T.V. &amp; cinema are used.</p>	<p>Years of experience show that all the different media are important because they appeal to and reach the various sorts of people according to their inclinations. Tour promotion pamphlets, however have a more direct impact.</p>
11.	<p>040</p> <p>Yes, (a) &amp; (b)</p>	<p>Couldn't say</p>	<p>Couldn't say</p>	<p>Couldn't say</p>	<p>Couldn't say</p>	
12.	<p>041</p> <p>No. all. In Uganda, preference is for the Murchison N.P.</p>	<p>Couldn't say</p>	<p>Couldn't say</p>	<p>c) Newspaper d) Periodicals e) Any other: e.g. Neon (electric) signs; film movie theatres; stressing U.A.R. service to Uganda &amp; else where, all as part of U.A.R. publicity technique.</p>	<p>e) Any other - e.g. Neon (electric) signs. The human mind is more receptive to such objects.</p>	
13.	<p>042</p> <p>Yes, a) &amp; (c)</p>	<p>Not applicable</p>	<p>Not applicable</p>	<p>Not applicable</p>	<p>Not applicable</p>	
14.	<p>043</p> <p>Not applicable since we don't arrange charter flights for tourists.</p>	<p>N/A</p>	<p>N/A</p>	<p>N/A</p>	<p>N/A</p>	

cont.--

QUESTIONNAIRE AIRLINES CODE NOS.	Do you directly operate charter flights? (Yes) (NO)	If yes, what sort of people do you bring to Uganda? (Students) (Tourists), (Any other)	Are your planes chartered by any other organizations for (Students), (Tourists) (Any other). If yes, please give their names	Do the tourists demand package tours from your company? (Yes) (No)	If yes, what arrangements have you made to satisfy the tourists' demand? (Subcontract) (Ourselves)
1. 030	Yes	Students Tourists, businessmen and players		Yes, some do but most do so through tour companies	By ourselves
2. 031	Yes	Students, Residents in Uganda and relatives, yes.	Yes, for students & any others, by Padhanis Ltd.	Yes	By subcontract to Kuon's Swams Cooks Travel - Whole salers.
3. 032	No	Not applicable	Yes, E.A. Common services Organisation for Govt. Personnel going on leave occasionally	Yes	By subcontract to tour operators. By ourselves - up to 33-1/3% discount on fares for inclusive tours for a minimum group of 15.
4. 033	No, Inadequacy of Entebbe runway a bottle neck to use of larger aircraft to bring in larger number of tourist at lower rates	Not applicable	Yes, for students, by SOTAIR, a subsidiary of Air France. But not to Uganda yet.	Yes	By subcontract
5. 034	No.	N/A	None from here. Flight programme from home office precludes this. Occasionally charter planes from Addis come here to pick players for the E.A. Championships.	Yes	By subcontract to travel agents who pay us 10% commission on the deal.
6. 035	No	N/A	No	Yes	Both. Fare is reduced up to 55% for a minimum of 15 tourists. We work in close collaboration with local and foreign Tour Companies.
7. 036	No	N/A	No	Yes	Subcontract.
8. 037	No	N/A	No	Yes	Both
9. 038	No	N/A	No	Yes	Both. Subcontract is by a Tour Organizer called 'Globe Trotter' a wholesaler which has many other travel agents.
10. 039	No	N/A	No	Yes	Subcontract
11. 040	Yes	Students, any others, like teachers (e.g. T.D.A.)	No	No	Not applicable



---

This work is licensed under a  
Creative Commons  
Attribution – NonCommercial - NoDerivs 3.0 Licence.

To view a copy of the licence please see:  
<http://creativecommons.org/licenses/by-nc-nd/3.0/>