

PUBLIC TRANSPORT TRENDS IN UGANDA\_ANNUAL REPORT 2023.



## EXECUTIVE SUMMARY

Public transport is a critical component of Uganda's transportation infrastructure, impacting the daily lives and economic activities of its population. In this comprehensive study, we delve into the dynamics of public transport fares and fuel prices in Uganda throughout the year. The importance of a reliable and affordable transportation network cannot be overstated, and this research aims to provide valuable insights for policymakers, transport authorities, and stakeholders.

A longitudinal research design was employed, involving weekly data collection from taxi parks and bus stations around Kampala. The study focused on routes connecting Kampala to various destinations across the country. This approach allowed for a detailed examination of temporal variations, seasonal trends, and the impact of external events on public transport fares. Additionally, fuel prices were tracked throughout the year to understand their influence on transportation dynamics.

**Christmas Season Fluctuations:** The Christmas season witnessed significant spikes in transport fares, with Masaka experiencing the highest increase at 200%, followed by Mbarara, Kabale, and Fort Portal at 133.3% and 125%, respectively. Other towns also recorded varying degrees of increases during this festive period.

**Annual Scan Highlights:** Kotido emerged as the town with the highest overall change in fares throughout the year, showing a significant 71.4% increase. Mbarara followed suit with a 40% change, and various towns displayed diverse patterns, reflecting the dynamic nature of transportation across regions.

**Fuel Price Dynamics:** The year commenced with elevated fuel costs for both petrol and diesel, with gradual decreases until August. Petrol prices saw an annual increase of 7.06%, reaching 5,610 UGX per litre, while diesel prices dropped by -5.48% to 5,260 UGX per litre.

**Implications and Recommendations:** Understanding the nuances of public transport dynamics and fuel price fluctuations is essential for crafting responsive policies and strategies. Policymakers and stakeholders can leverage these findings to enhance the efficiency, accessibility, and affordability of public transportation in Uganda. Consideration of regional variations and the influence of external events will be crucial for the development of a resilient and adaptive transportation network that aligns with the evolving needs of the Ugandan population.

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## 1.1 INTRODUCTION

**Neofacts Ltd** is a Ugandan Based Research Organization dedicated to providing high- quality and thorough research services to a wide range of clients. We have a team of experienced researchers with a diverse range of expertise and backgrounds, allowing us to tackle projects in a variety of fields and sectors such as Public Policy, Politics & Governance, Economics, Agriculture, Oil & Gas, Public Health & pharmaceuticals, Finance & Banking, Education, FMCGs, Development Projects, Transport & Logistics sector, ICT and media. We pride ourselves on our attention to detail, critical thinking skills, and ability to deliver results in a timely manner. We believe in the importance of staying up to date with the latest research and methodologies, and constantly strive to improve and expand our skills to match the current trends. Our organization values integrity, transparency, and collaboration, and we work closely with our partners to ensure that their needs and expectations are met. We are committed to providing exceptional service and delivering high-quality research that helps, individuals, businesses, organizations and governments make informed decisions.

## 1.2 STUDY BACKGROUND

Public transport is a critical component of the transportation infrastructure in Uganda, playing a pivotal role in connecting urban and rural areas, facilitating economic activities, and contributing to the overall socio-economic development of the country. The importance of an efficient and reliable public transport system cannot be overstated, particularly in a nation like Uganda, where a significant portion of the population relies on it for their daily commuting needs.

This year-long study aims to shed light on the dynamics of public transport fares in Uganda, focusing on the route between Kampala, the capital city, and various destinations across the country by commuter taxi and buses. The chosen routes represent key connections that impact the lives of many Ugandans, influencing accessibility, affordability, and overall transportation experiences. Understanding the patterns and fluctuations in public transport fares is crucial for several reasons.

Firstly, it directly affects the economic well-being of the population, especially for those who depend on public transportation for their daily commute. Fluctuations in fares can impact household budgets, influence consumer behavior, and contribute to the overall cost of living.

Secondly, public transport is intricately linked to the economic activities of both urban and rural areas. The accessibility and affordability of transportation services influence trade, employment, and the flow of goods and services. Hence, a comprehensive understanding of the factors influencing transport fares is essential for policymakers, urban planners, business community and stakeholders to make informed decisions that positively impact the economic landscape of Uganda.

Furthermore, the study takes into account the unique challenges faced by the public transport system in Uganda, such as infrastructure issues, seasonal variations, and unexpected events like bridge collapses. The goal is to provide insights that can contribute to the development of sustainable and resilient transportation systems, ensuring the well-being and convenience of the Ugandan population.

This study serves as a valuable exploration into the intricacies of public transport in Uganda, emphasizing its significance in the daily lives of the people and its broader impact on the nation's

economic vitality. Through a comprehensive analysis of transport fares, the study aims to contribute valuable insights for fostering improvements in the efficiency, accessibility, and affordability of public transportation in Uganda.

## 2.1 METHODOLOGY

### 2.1.1 Research Design

In this study investigating the dynamics of public transport fares in Uganda, a longitudinal research design was employed, involving the periodic collection of data every week from taxi parks and several bus stations around Kampala. The longitudinal approach was chosen to observe changes in transportation fares over an extended duration, providing insights into trends, patterns, and potential causal relationships.

**Extended Observation Period:** The study extended over an entire year, capturing data on a weekly basis. This prolonged observation period allowed researchers to monitor transport fare dynamics across different seasons, events, and potential external influences over an extended timeframe.

**Consistent Data Collection Schedule:** Data was collected consistently on a weekly basis. This regularity facilitated the creation of a comprehensive dataset, enabling researchers to identify trends and fluctuations in transport fares over time. The systematic collection schedule reduced the likelihood of missing critical changes in pricing patterns.

**Locations:** Taxi parks and various bus stations around Kampala served as consistent data collection points throughout the study. This ensured that the observations were geographically distributed, encompassing diverse routes and reflecting the broader transportation network in the region.

**Detailed Time-Series Analysis:** The data collected was structured as a time-series, enabling detailed analysis of changes over time. Researchers could conduct statistical analyses, such as trend analyses to identify patterns and relationships between time and transport fare variations.

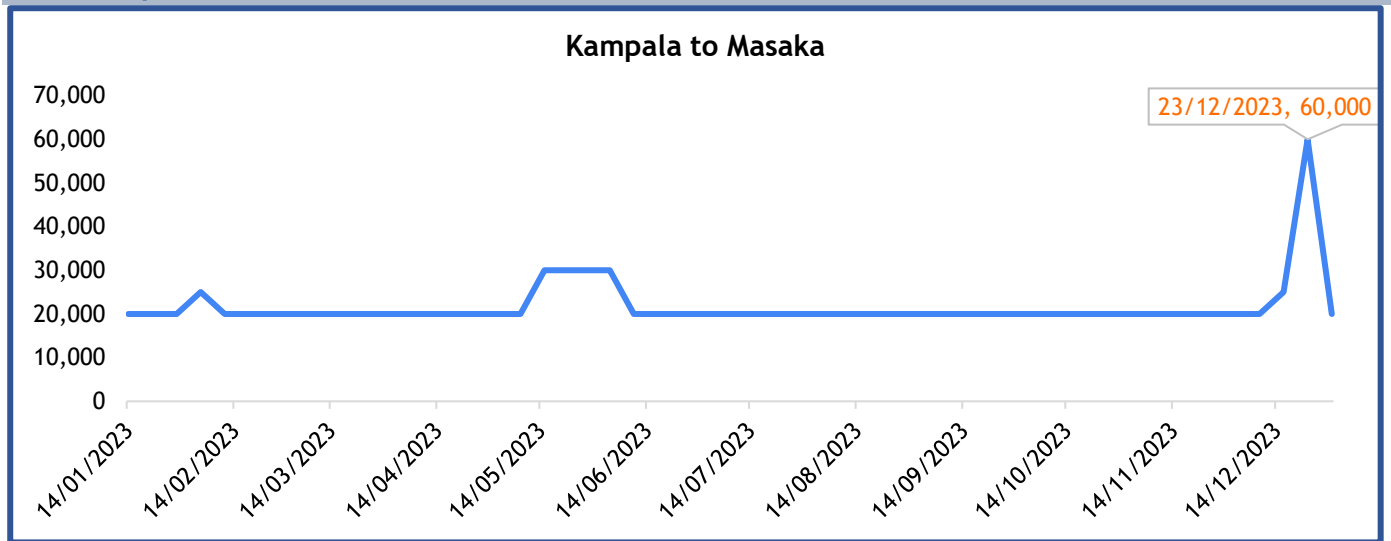
**Identification of Seasonal Trends:** The longitudinal design allowed for the identification of seasonal trends in transportation fares. For example, researchers could observe if prices tended to increase during specific months or periods, providing insights into the impact of seasonality on public transport pricing.

**Event Analysis:** External events, such as the Katonga Bridge collapse or the Christmas season, were observed over time to understand their impact on transport fares. This holistic approach facilitated the identification of both short-term and long-term effects of events on pricing dynamics.

By employing a longitudinal research design with weekly data collection, the study provided a thorough examination of the dynamics of public transport fares in Kampala over an extended period. This approach allowed for a nuanced understanding of how pricing evolved over time, contributing valuable insights to transportation planning and policy-making.

### 3.1 FINDINGS

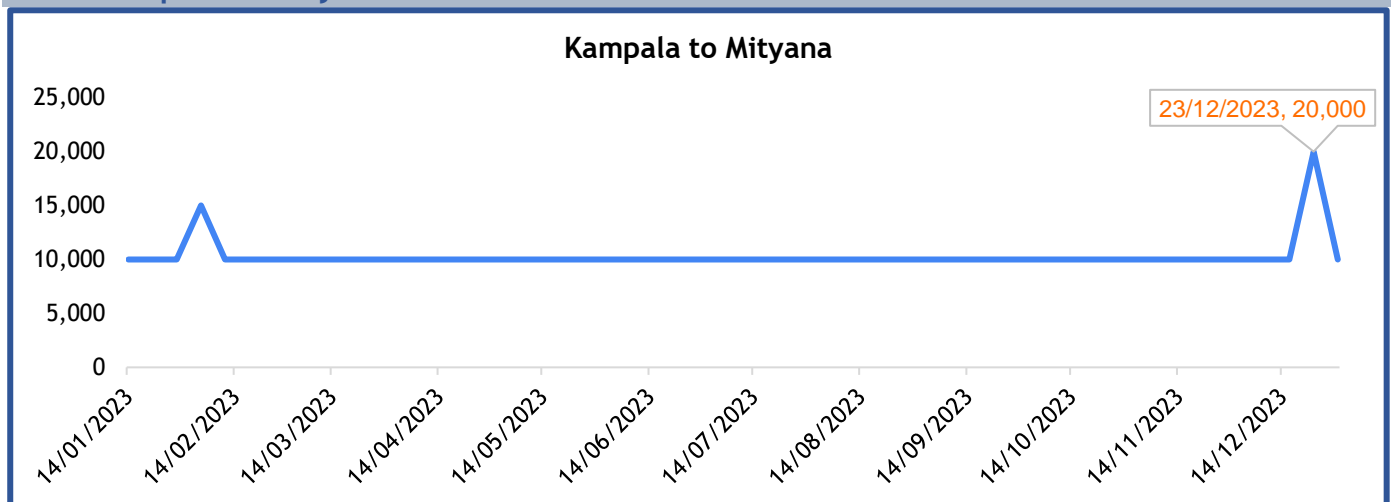
#### 3.1. Kampala to Masaka



The public transport route from Kampala to Masaka city has generally maintained a stable fare of 20,000 UGX. However, certain fluctuations were observed during specific periods. In February, there was an increase in transportation costs, reaching 25,000 UGX. Another surge occurred between May 2023 and June, with fares peaking at 30,000 UGX. The transportation landscape experienced a significant disruption with the collapse of a section of the Katonga Bridge along the Masaka-Kampala highway. This incident led to diversions and subsequently higher transport fares as alternative routes were established.

On Christmas Eve, there was a substantial spike in transport fares to Masaka, soaring to 60,000 UGX, marking a staggering 200% increase from the standard 20,000 UGX fare. This surge was likely attributed to increased demand during the festive season. However, by December 30th, 2023, transport fares had reverted to the usual 20,000 UGX, indicating a notable decline.

#### 3.1.2 Kampala to Mityana



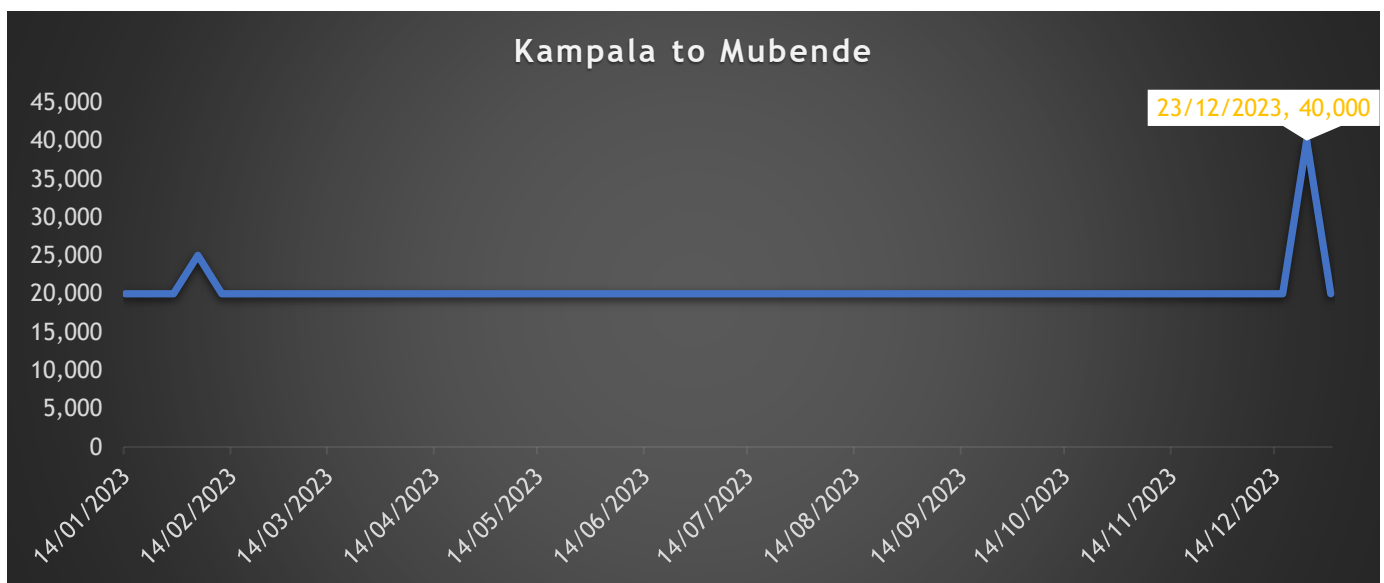
The public transport fare from Kampala to Mityana remained consistently stable at 10,000 UGX throughout the entirety of 2023. However, there were notable fluctuations during specific

periods. In February and on Christmas Eve in December, there was a considerable increase in transport fares, reaching 20,000 UGX, marking a 100% surge.

It appears that these spikes in fares were temporary and linked to specific events, possibly increased demand during these periods. Notably, by December 30th, 2023, transport fares had reverted to the standard 10,000 UGX, indicating a stabilization in the pricing.

The fluctuations observed in February and December were influenced by factors such as seasonal demand, festivities, or other events affecting the transportation dynamics like reopening of school term in February. The subsequent return to the baseline fare by the end of the year suggests a temporary nature to these variations, with the transportation system eventually re-establishing stability.

### 3.1.3 Kampala to Mubende

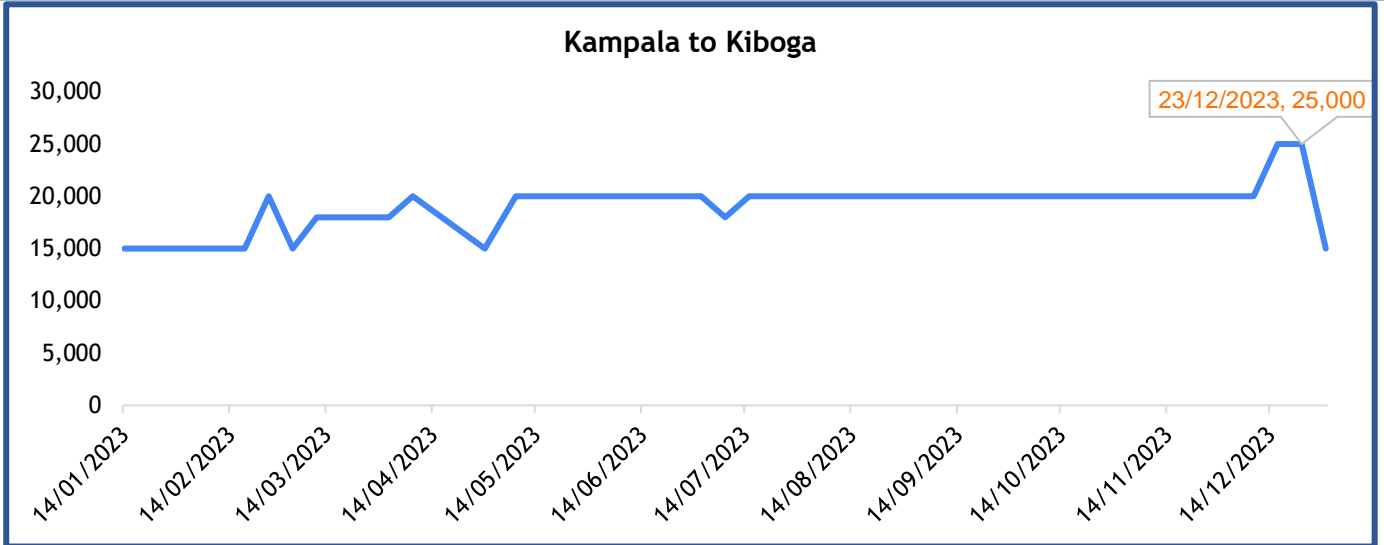


Similar to Mityana, the transportation landscape from Kampala to Mubende experienced a generally stable fare throughout 2023. However, there were observable fluctuations during specific periods. In both February and on Christmas Eve in December, there was a significant increase in transport fares, doubling from 20,000 to 40,000 UGX, representing a 100% increase.

These fluctuations were temporary and possibly tied to events or increased demand during these specific times. Notably, by December 30th, 2023, transport fares had returned to the standard 20,000 UGX, indicating a reestablishment of stability in pricing.

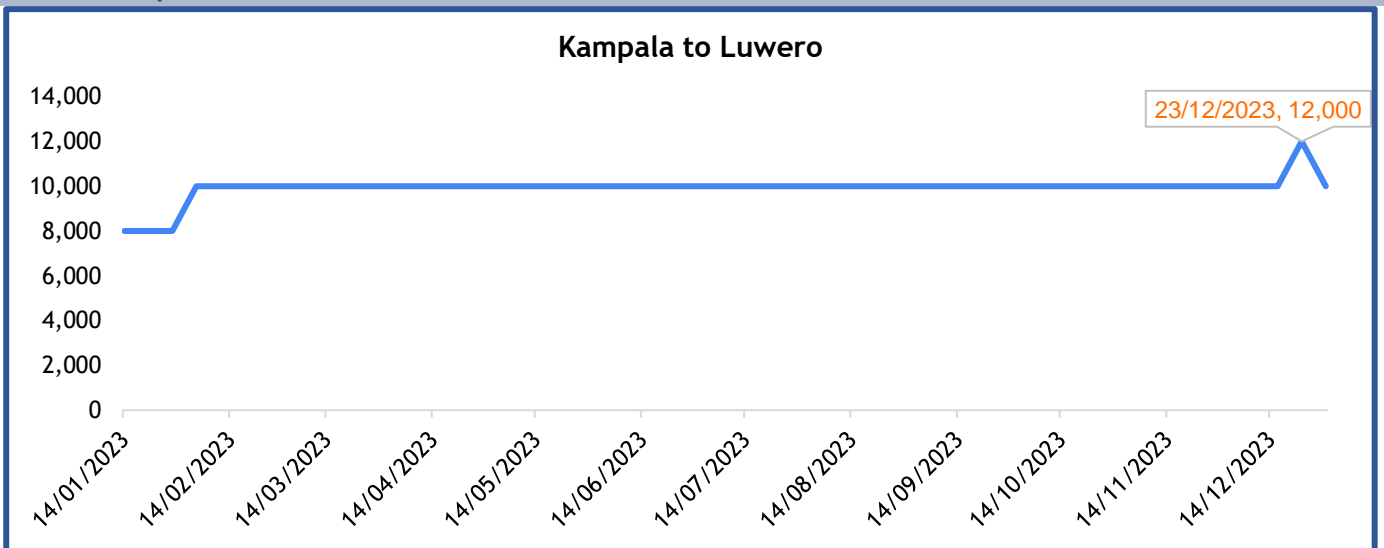


### 3.1.4 Kampala to Kiboga



Public transport fares to Kiboga exhibited a degree of instability over the course of 2023. In January, the transportation cost was 15,000 UGX, but it experienced fluctuations in subsequent months. In February, fares increased to 20,000 UGX, followed by a decrease to 18,000 UGX in August. Notably, during Christmas Eve, there was a further increase from 20,000 UGX to 25,000 UGX, reflecting a 25% rise. However, by December 30th, 2023, transport fares had reverted to the initial rate of 15,000 UGX. The fluctuations underscore the dynamic nature of public transport pricing, with the year culminating in a return to the original fare, suggesting a level of stabilization by the end of 2023.

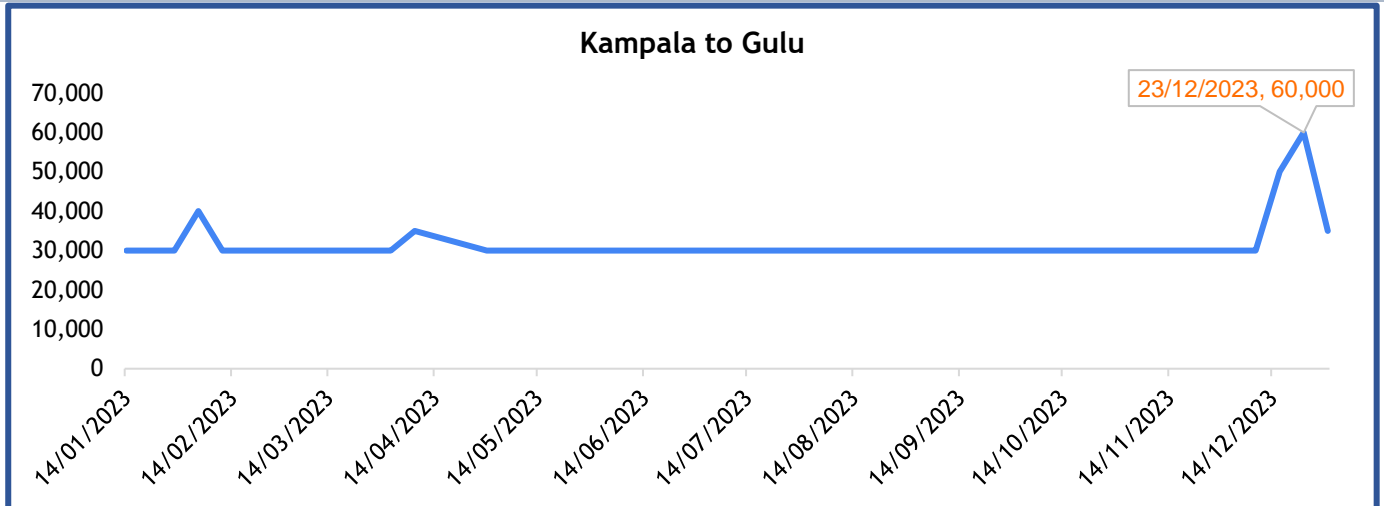
### 3.1.5 Kampala to Luwero



Transport fares from Kampala to Luwero demonstrated relative stability throughout the entirety of 2023. While a slight increase occurred in February, moving from 8,000 UGX to 10,000 UGX, and there was another uptick during Christmas Eve, where fares rose to 12,000 UGX reflecting 20% increase, by December 30th, 2023, transport fares had stabilized back to 10,000 UGX.

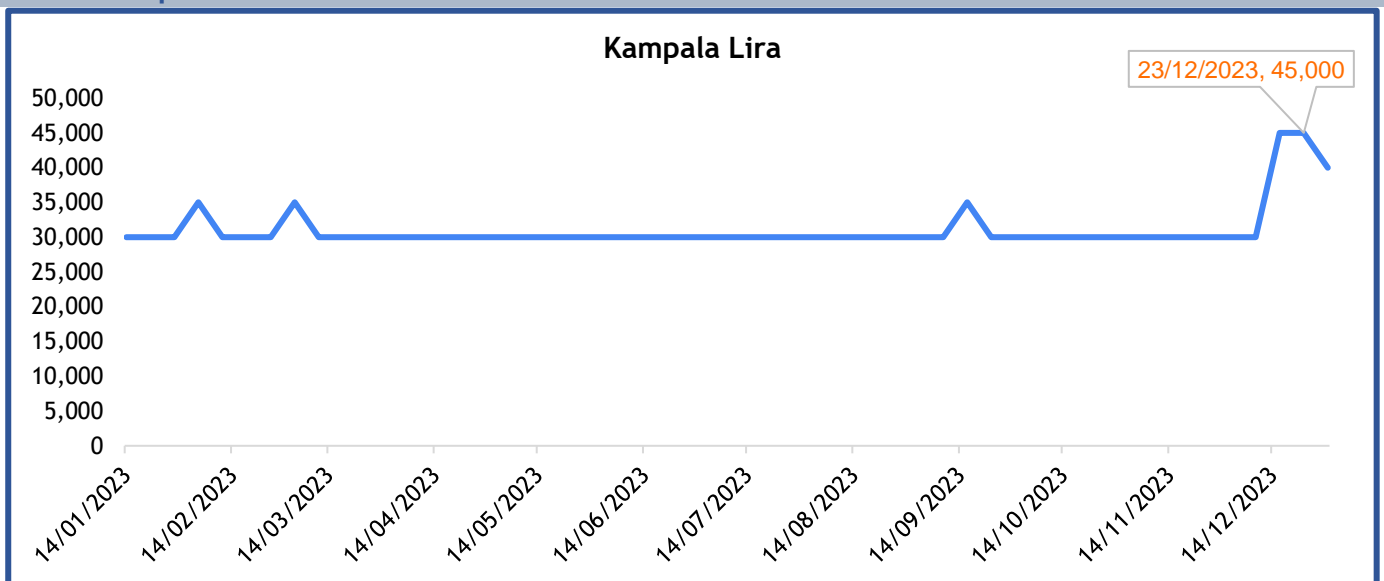
The modest fluctuations in February and December may have been influenced by factors such as seasonal demand or specific events, contributing to a temporary adjustment in pricing. However, the subsequent return to the baseline fare by the end of the year indicates a restoration of stability in the transportation costs from Kampala to Luwero.

### 3.1.6 Kampala to Gulu



Transport from Kampala to Gulu demonstrated overall stability throughout the year 2023. In January, the fares were set at 30,000 UGX, experiencing a slight increase to 35,000 UGX in February. The most notable surge took place during Christmas Eve, with fares escalating from 30,000 UGX to 60,000 UGX, representing a substantial 100% increase. However, by December 30th, the fares had dropped to 35,000 UGX, reflecting a 16.7% increase over the course of the year. The fluctuations in February and Christmas Eve are influenced by heightened demand during specific periods, potentially due to seasonal factors and impacting travel dynamics.

### 3.1.7 Kampala to Lira

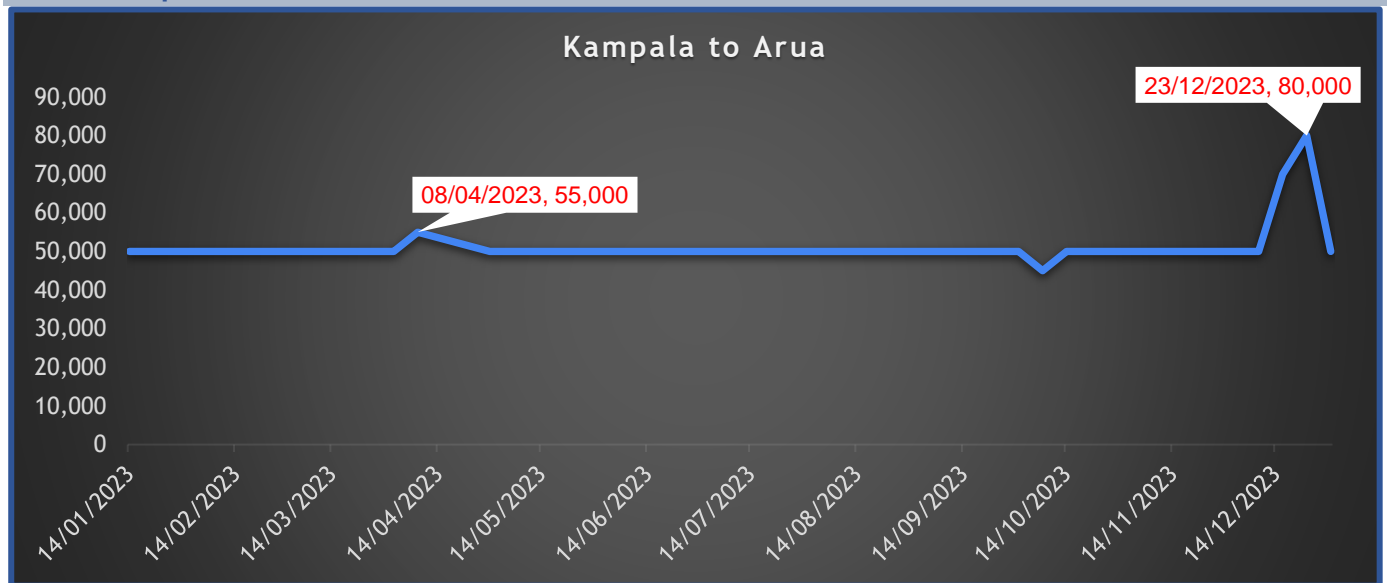


Transport to Lira maintained a general sense of stability throughout the year 2023. In January, the fares were established at 30,000 UGX, experiencing slight increases in February, March, and

September, reaching 35,000 UGX. A more substantial increase occurred during the Christmas season when fares rose from 30,000 UGX to 45,000 UGX, reflecting a significant 50% increase. However, by December 30, 2023, the fares dropped to 40,000 UGX, signifying a 33.3% increase in transport fares by the end of the year.

The minor fluctuations in February, March, and September might have been influenced by various factors such as seasonal demand or specific events impacting transportation dynamics such as school reopening in February, and Easter Holiday in March. The notable increase during the Christmas season suggests heightened demand during this festive period. The subsequent decrease in fares by the end of December indicates a response or adjustment in pricing, resulting in a relatively stabilized fare compared to the peak during the Christmas season.

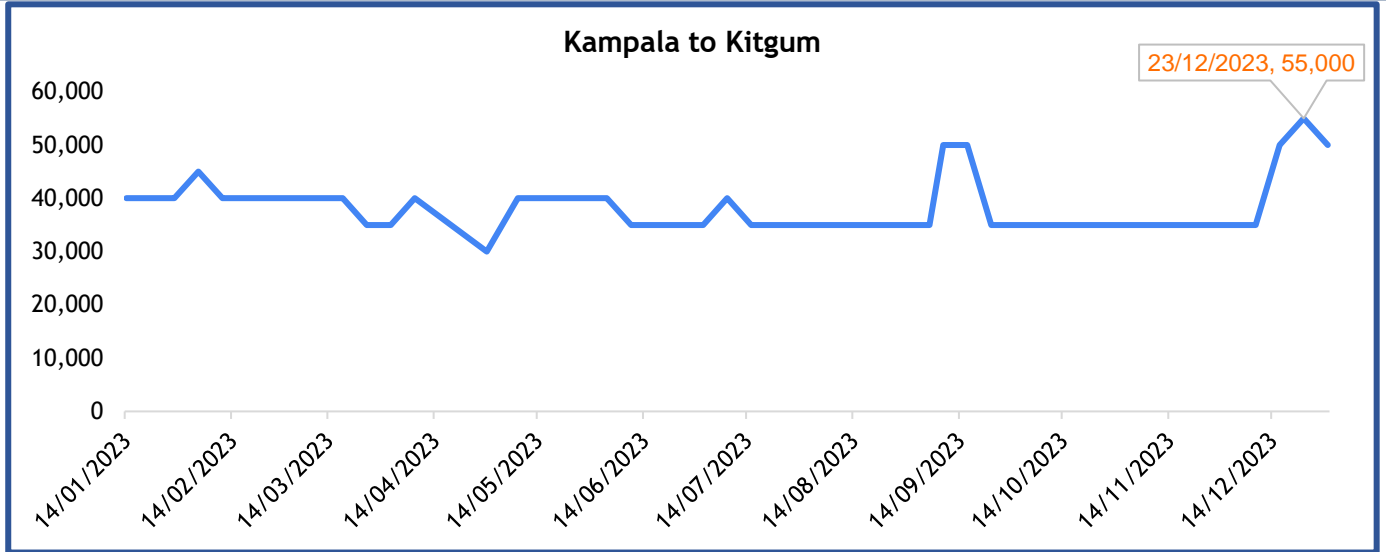
### 3.1.8 Kampala to Arua



Transport fares from Kampala to Arua demonstrated stability throughout the year, with few seasonal changes. The fares commenced at 50,000 UGX in January 2023, experiencing a slight increase to 55,000 UGX around April, and then stabilizing at 50,000 UGX in May. A significant change occurred during Christmas Eve in December when the prices surged from 50,000 UGX to 80,000 UGX, reflecting a substantial 60% increase. However, by December 30th, 2023, the fares dropped back to 50,000 UGX.

The minor fluctuations around April may have been influenced by seasonal factors or other temporary considerations, while the remarkable increase during the Christmas season likely reflects heightened demand during this festive period. The subsequent drop in fares by the end of December indicates a responsive adjustment in pricing, resulting in a return to the baseline fare and overall stability in transport costs from Kampala to Arua.

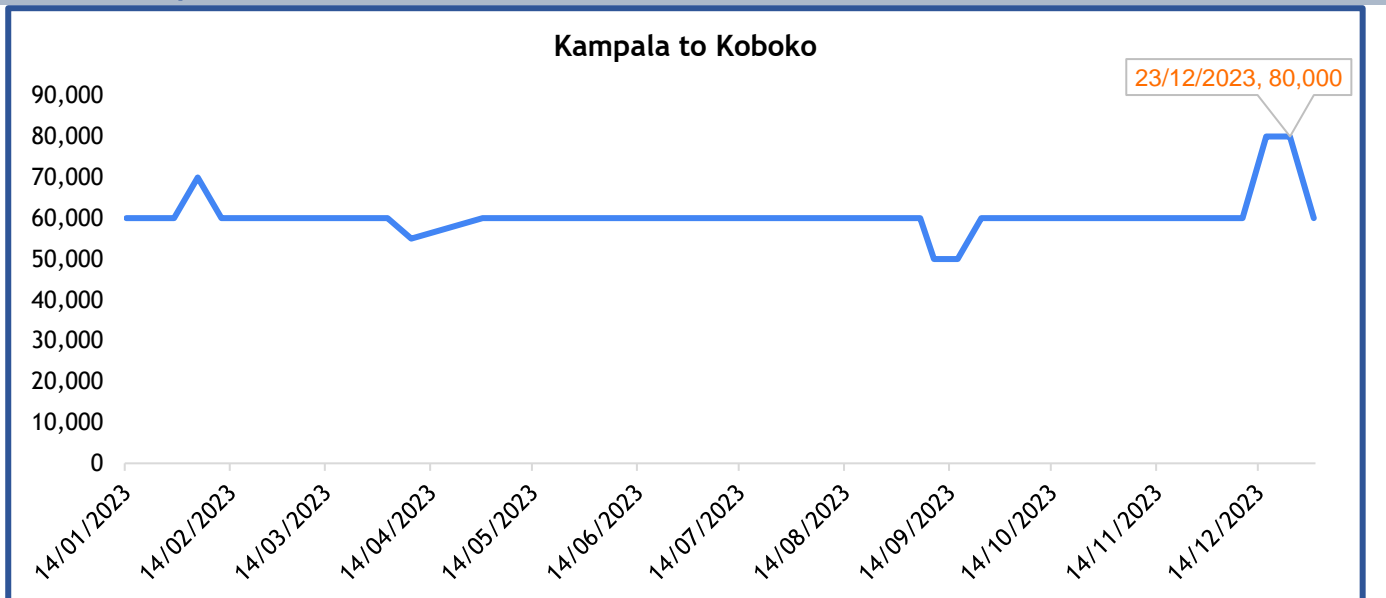
### 3.1.9 Kampala to Kitgum



Transport fares from Kampala to Kitgum exhibited instability throughout the year. The fares started at 40,000 UGX in January, increased to 45,000 UGX in February, dropped to 35,000 UGX in April, further decreased to 30,000 UGX by the end of April, then returned to 40,000 UGX in May. There was a substantial increase in September, reaching 50,000 UGX. The most significant surge occurred during Christmas Eve when fares rose from 35,000 UGX to 55,000 UGX, reflecting a substantial 57.1% increase. However, by December 30th, 2023, the fares dropped to 50,000 UGX, indicating a 25% increase in transport fares throughout the year.

The fluctuations observed in the fares suggest a dynamic pricing environment, influenced by various factors such as seasonal demand, economic conditions, or specific events affecting transportation dynamics.

### 3.1.10 Kampala to Koboko

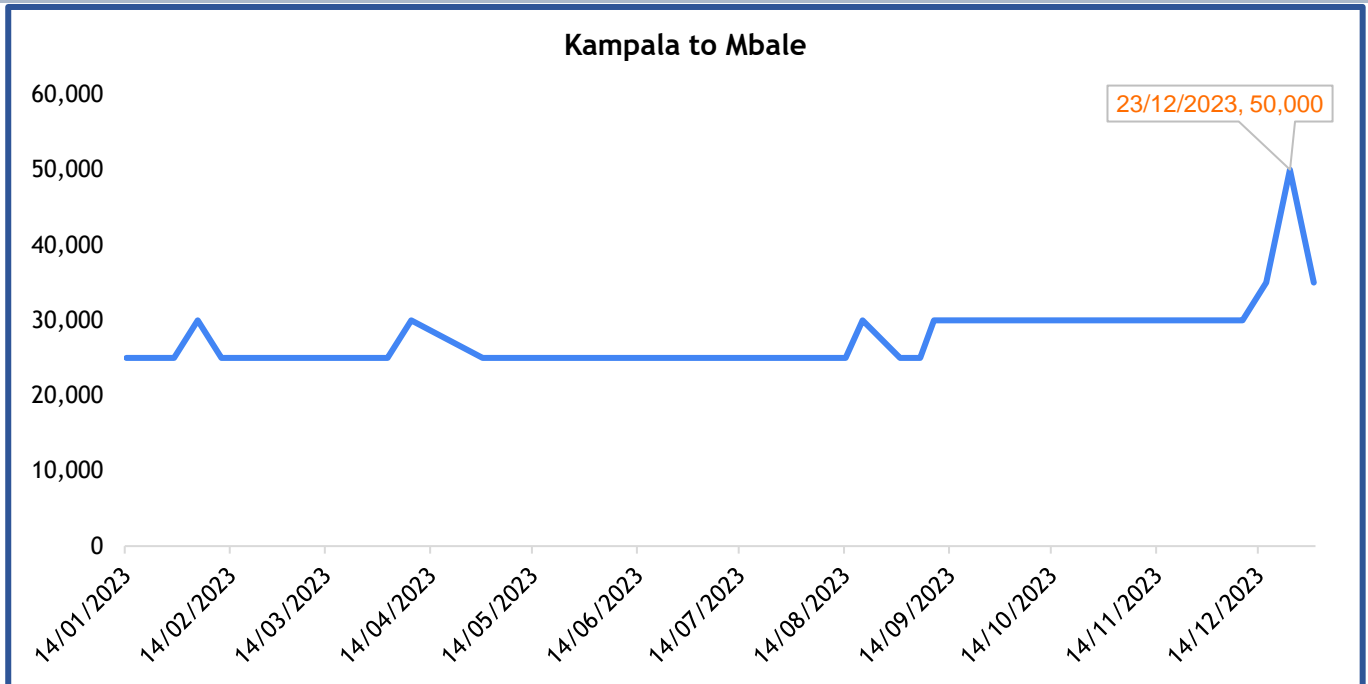


Transport fares to Koboko demonstrated relative stability throughout the year, with a few changes noted in February, April, September, and December. The fares began at 60,000 UGX in January and experienced a modest increase to 70,000 UGX in February. The most significant

increase occurred during the Christmas season, with prices rising from 60,000 UGX to 80,000 UGX, reflecting a 33.3% increase. However, by December 30th, 2023, the fares dropped back to 60,000 UGX. This indicates that fares from Kampala to Koboko remained stable by the end of the year 2023.

The observed fluctuations in February, April, September, and December may have been influenced by factors such as seasonal demand. The decrease in fares by the end of December suggests a responsive adjustment in pricing, resulting in a return to a more stabilized fare compared to the peak during the Christmas season.

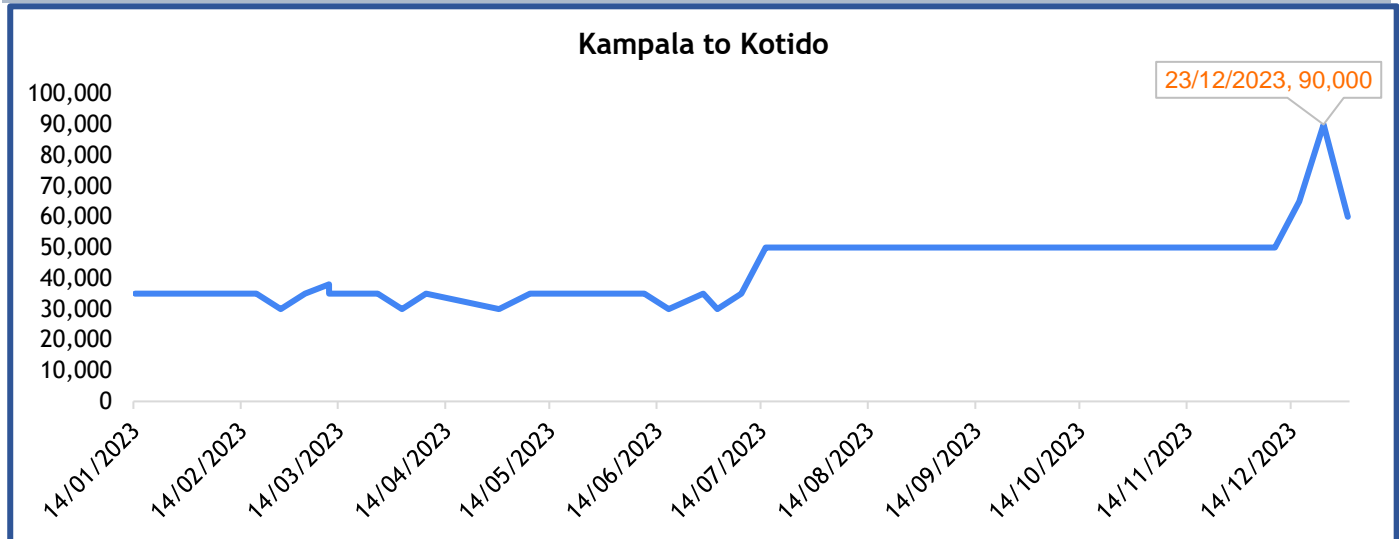
### 3.1.11 Kampala to Mbale



Transport fares from Kampala to Mbale remained relatively stable throughout the year. The fares started at 25,000 UGX in January and fluctuated between 25,000 and 30,000 UGX until September. A major increase occurred during the Christmas period when prices rose from 30,000 UGX to 50,000 UGX, representing a substantial 66.7% increase. However, by the 30th of December 2023, fares had dropped to 35,000 UGX.

Overall, throughout the year, transport fares from Kampala to Mbale increased from 25,000 UGX to 35,000 UGX by the 30th of December, reflecting a 40% increase in fares. The stability observed in the initial months, followed by a significant rise during Christmas and a subsequent drop by the end of December, highlights the dynamic nature of transportation pricing in this route.

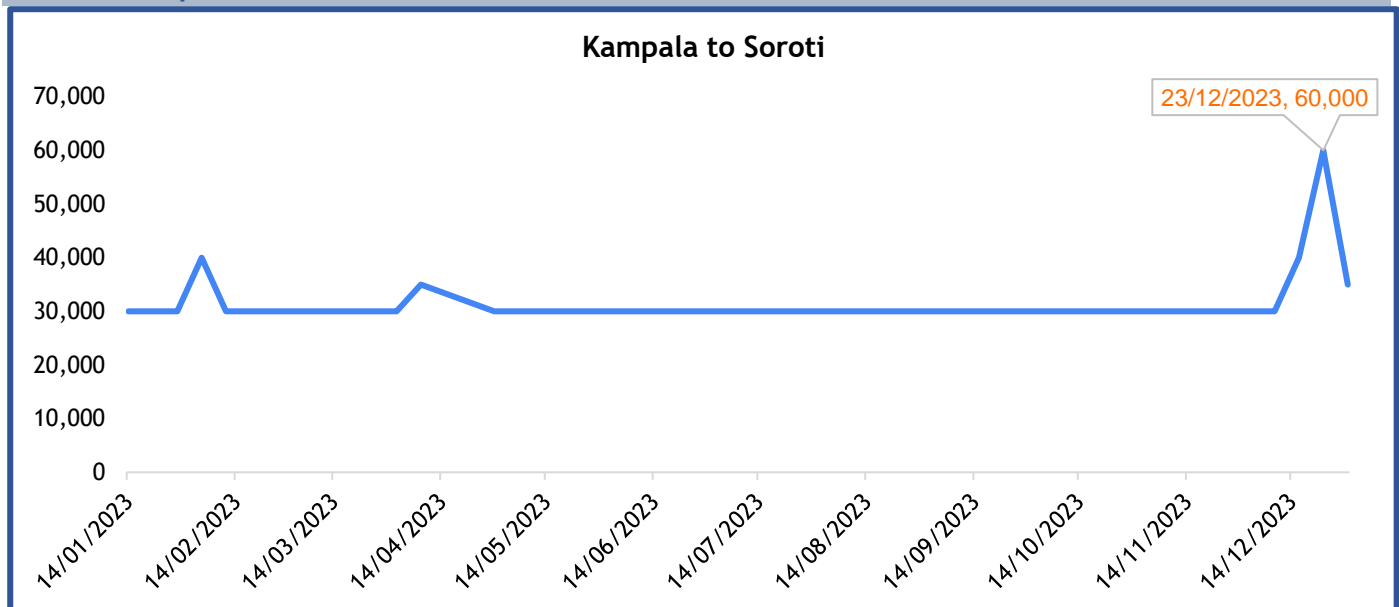
### 3.1.12 Kampala to Kotido



Transport fares from Kampala to Kotido in the first half of the year were unstable, with stability witnessed from July until the Christmas season. Fares started at 35,000 UGX in January, fluctuating between 30,000 UGX and 35,000 UGX. From July, the prices rose and stabilized at 50,000 UGX. A spike in fares occurred during the Christmas season when fares rose to 90,000 UGX from 50,000 UGX, reflecting a substantial 80% increase during Christmas. However, by the 30th of December, fares had reduced to 60,000 UGX.

A quick scan through the year indicates an increase in fares from 35,000 UGX at the beginning of the year to 60,000 UGX, reflecting a 71.4% increase. The period of instability in the first half of the year, followed by stability and a subsequent spike during Christmas, underscores the dynamic nature of transportation pricing from Kampala to Kotido.

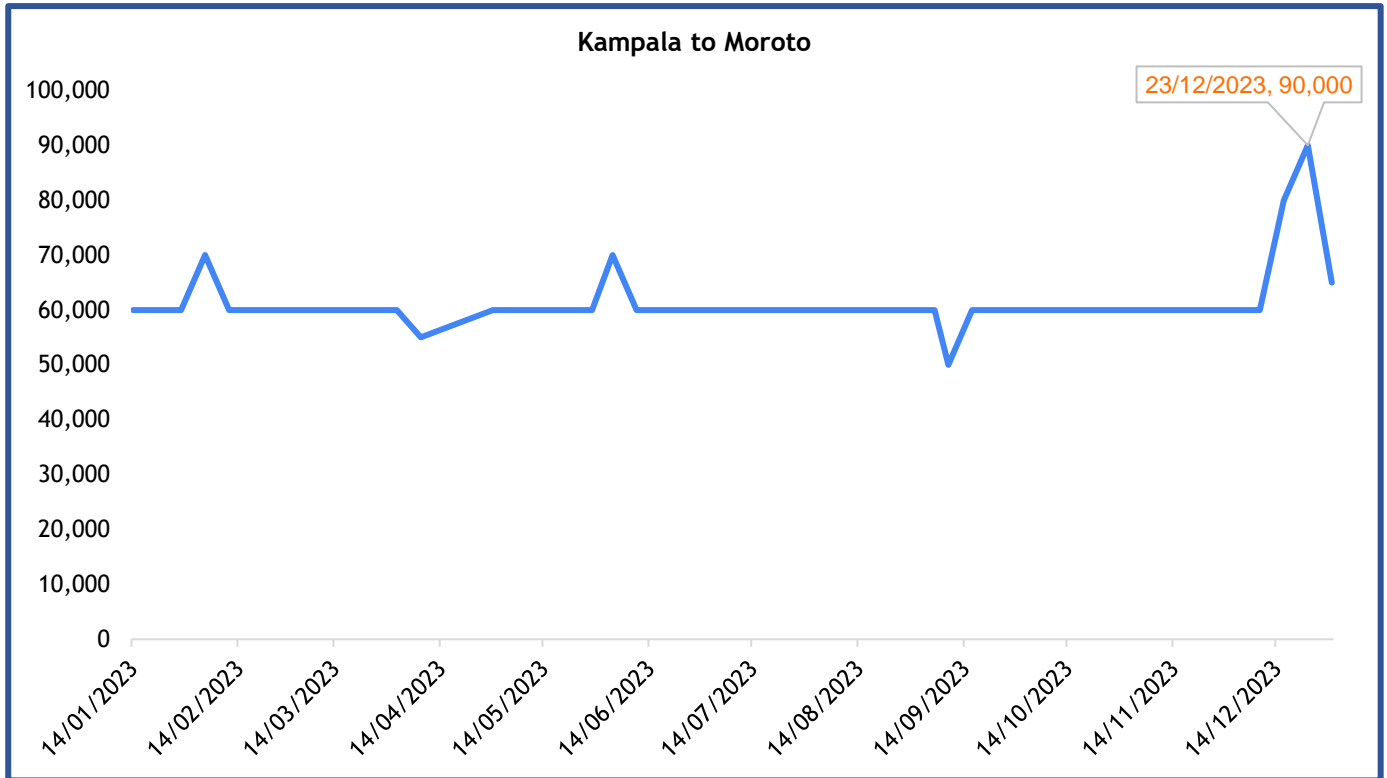
### 3.1.13 Kampala to Soroti



Transport fares from Kampala to Soroti remained fairly stable throughout the year, with slight changes observed in February and April. A major increase occurred during Christmas Eve when fares rose from 30,000 UGX to 60,000 UGX reflecting 100% increase. However, by the 30th of

December, fares had dropped to 35,000 UGX. Scanning through the year indicates an increase from 30,000 UGX to 35,000 UGX, reflecting a 16.7% overall increase. The stability observed in most months, along with the significant Christmas spike and subsequent decrease, showcases the dynamic nature of transportation pricing on this route.

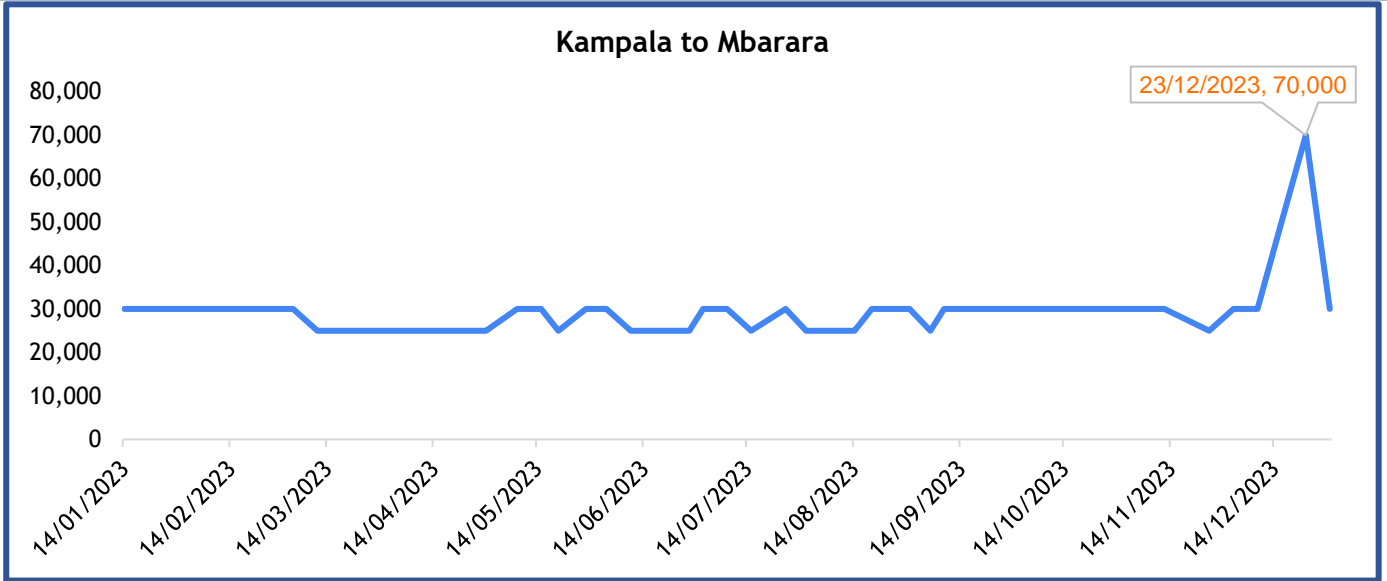
### 3.1.14 Kampala to Moroto



Transport fares from Kampala to Moroto remained relatively stable throughout the year. The fares were set at 60,000 UGX in January 2023, fluctuating between 50,000 UGX and 60,000 UGX until December. A spike in fares occurred during the Christmas season when fares rose to 90,000 UGX, reflecting a 50% increase. However, by the 30th of December, fares had receded to 65,000 UGX.

A quick scan through the year indicates that fares from Kampala to Moroto increased from 60,000 UGX to 65,000 UGX by the end of the year, reflecting an 8.3% increase overall. The stability observed throughout most of the year, punctuated by a Christmas spike and subsequent decrease, highlights the dynamic nature of transportation pricing on this route.

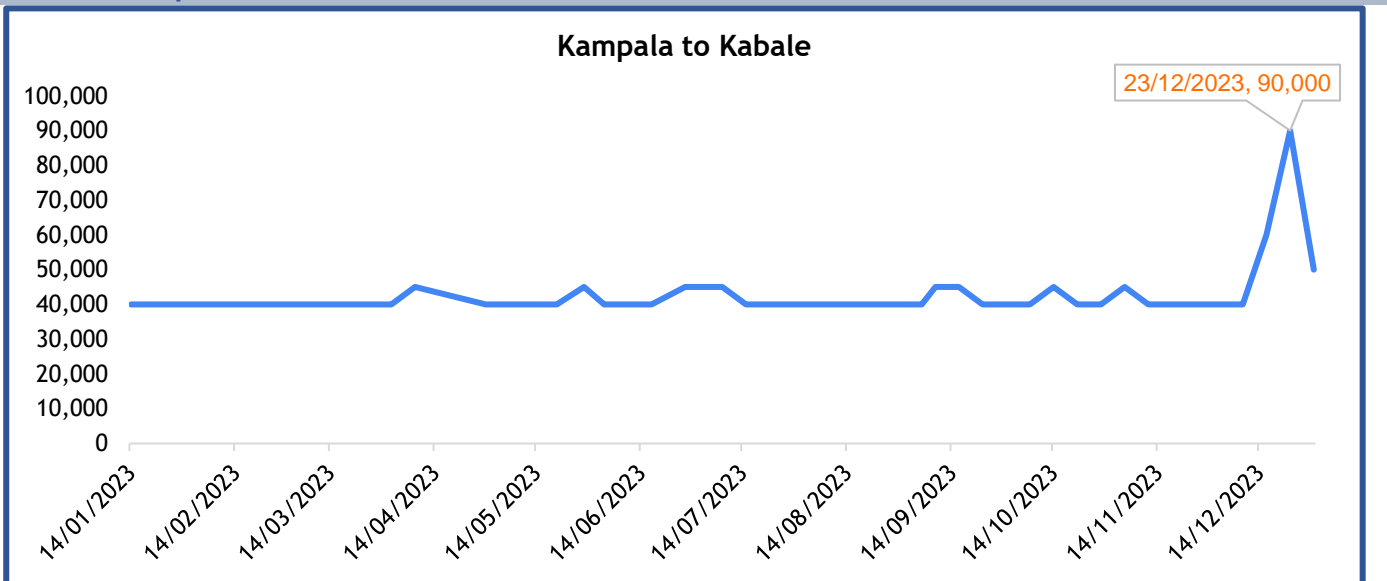
### 3.1.14 Kampala to Mbarara



Transport fares from Kampala to Mbarara remained relatively stable until around May when the Katonga Bridge collapsed, causing fluctuations in fares. In January, fares were set at 30,000 UGX and dropped to 25,000 UGX in March. Between May and September, fares fluctuated between 25,000 and 30,000 UGX. A major increase occurred during Christmas when fares spiked from 30,000 UGX to 70,000 UGX, reflecting a significant 133.3% increase. However, by the 30th of December, fares had dropped back to 30,000 UGX.

A quick scan through the year reveals no net change in fares by the end of the year. The stability observed in the initial months, followed by fluctuations due to the Katonga Bridge collapse and a substantial increase during Christmas, ultimately balanced out with a drop in fares by the end of December, resulting in no overall change in transportation costs from Kampala to Mbarara for the year.

### 3.1.15 Kampala to Kabale



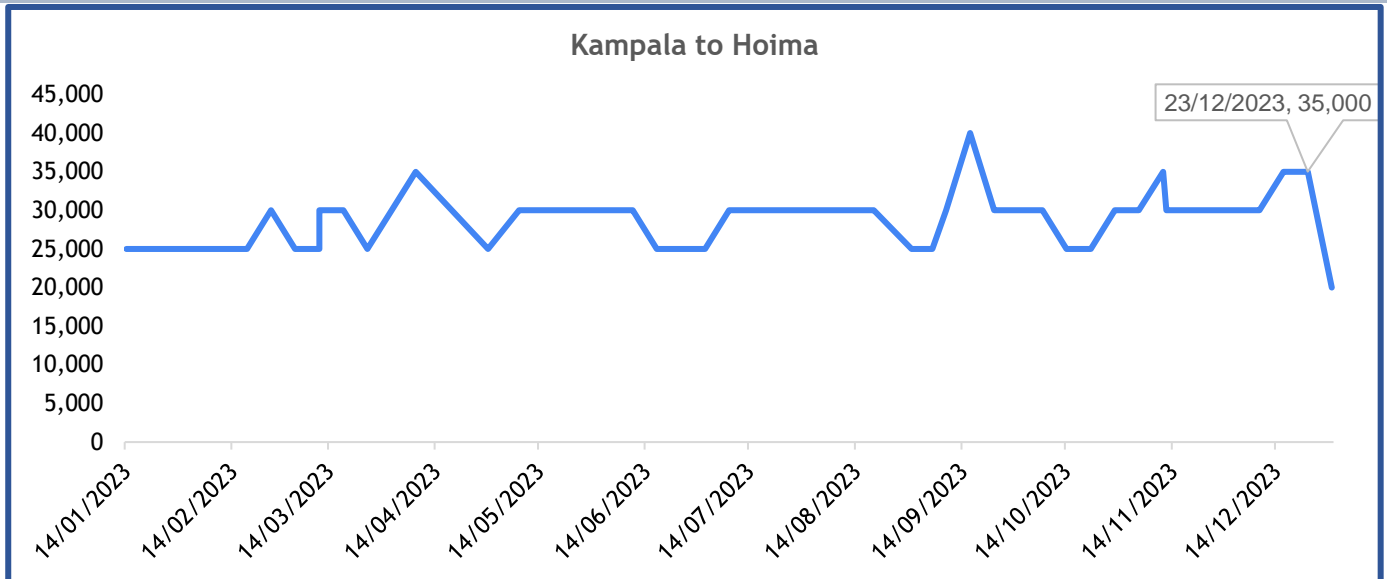
Transport fares from Kampala to Kabale remained relatively stable throughout the year. The fare started at 40,000 UGX in January, with slight increases observed in April, May, around July,



September, and November, fluctuating between 40,000 and 45,000 UGX. A major increase was witnessed during the Christmas period when fares surged from 40,000 UGX to 90,000 UGX, reflecting a substantial 125% increase. However, by the 30th of December 2023, fares had dropped to 50,000 UGX.

A quick analysis indicates an increase from 40,000 UGX in January to 50,000 UGX by the end of the year, representing a 25% increase. Despite the fluctuations throughout the year, the transportation fares from Kampala to Kabale demonstrated a relatively stable trend, with the significant increase during Christmas Eve balanced by a subsequent drop by the end of December.

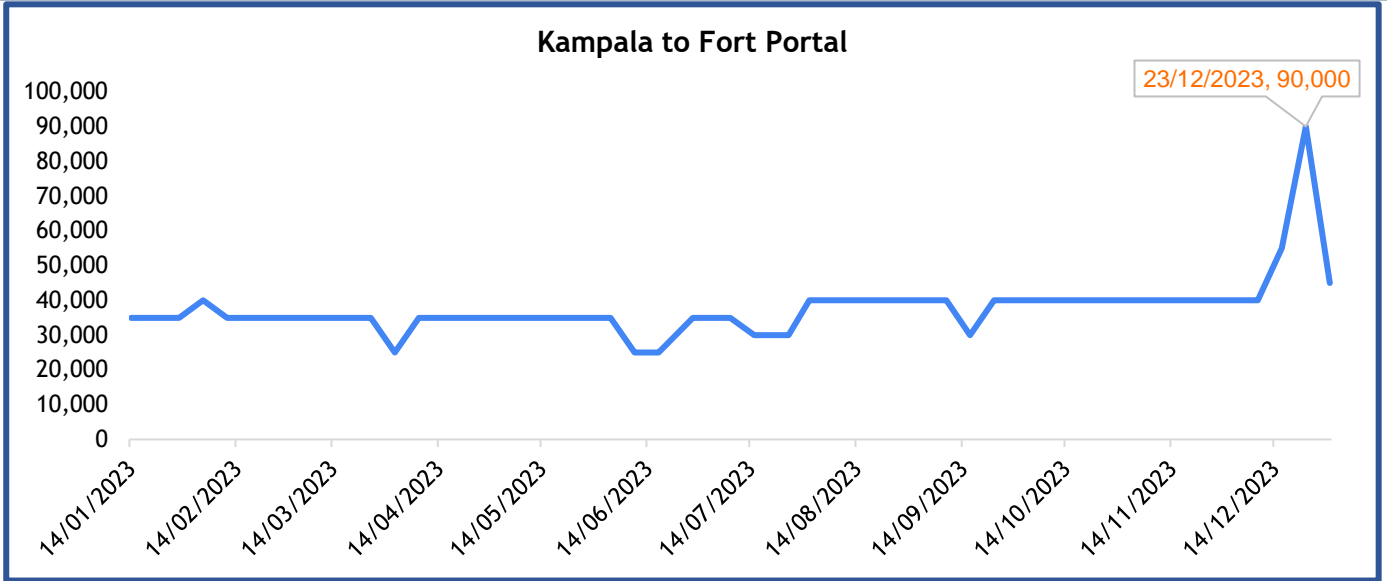
### 3.1.16 Kampala to Hoima



Transport fares from Kampala to Hoima exhibited a chaotic and unpredictable pattern throughout the year. The fares began at 25,000 UGX in January, increased to 35,000 UGX in April, further escalated to 40,000 UGX in September, maintained at 35,000 UGX during Christmas Eve, and ultimately dropped to 20,000 UGX by the end of the year.

The considerable changes in fares over the year highlight the unpredictability in the transportation market from Kampala to Hoima, making it challenging to anticipate and plan for consistent pricing during different periods

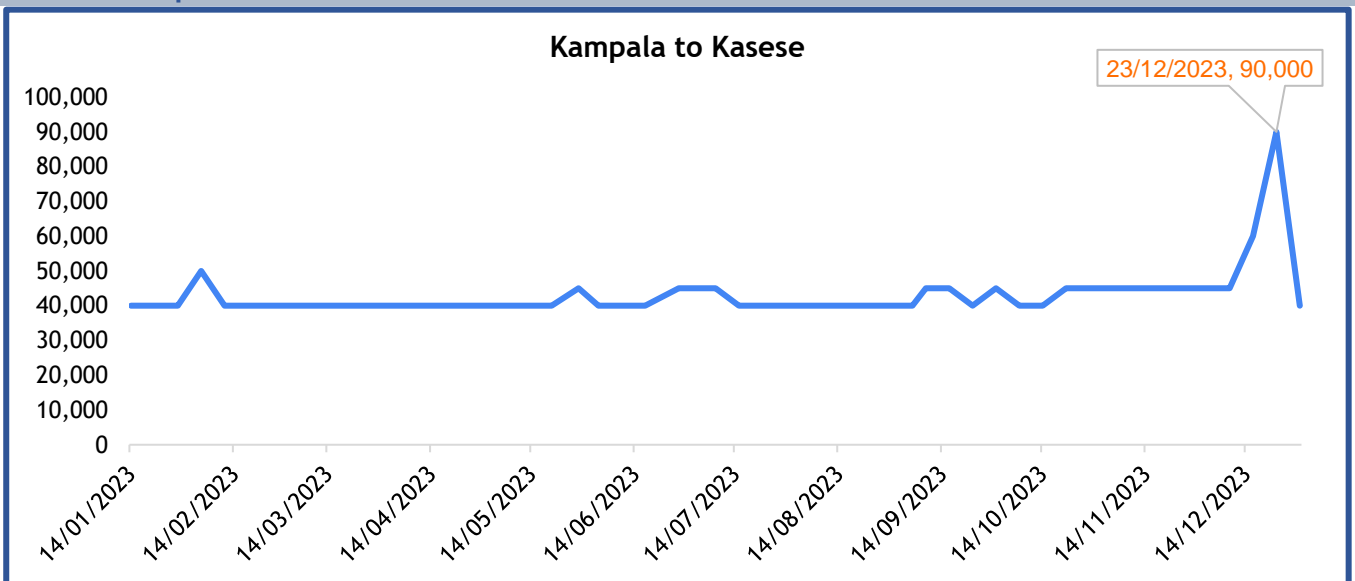
### 3.1.17 Kampala to Fort Portal



Transport fares from Kampala to Fort Portal exhibited relative instability throughout the year. Commencing at 35,000 UGX in January, the fares increased to 40,000 UGX in February, then dropped to 25,000 UGX in April, experienced another increase to 40,000 UGX in September, and remained at this level through December. A significant surge occurred during Christmas Eve when fares rose from 40,000 UGX to 90,000 UGX, representing a substantial 125% increase during the Christmas season. However, by the 30th of December, the fare dropped to 45,000 UGX.

Comparing this to the starting fare of 35,000 UGX at the beginning of the year, by the end of December, transport fares from Kampala to Fort Portal had increased by 28.6%. The decrease in fares by the end of December suggests a responsive adjustment in pricing, although the overall trend indicates an increase compared to the initial fare at the beginning of the year.

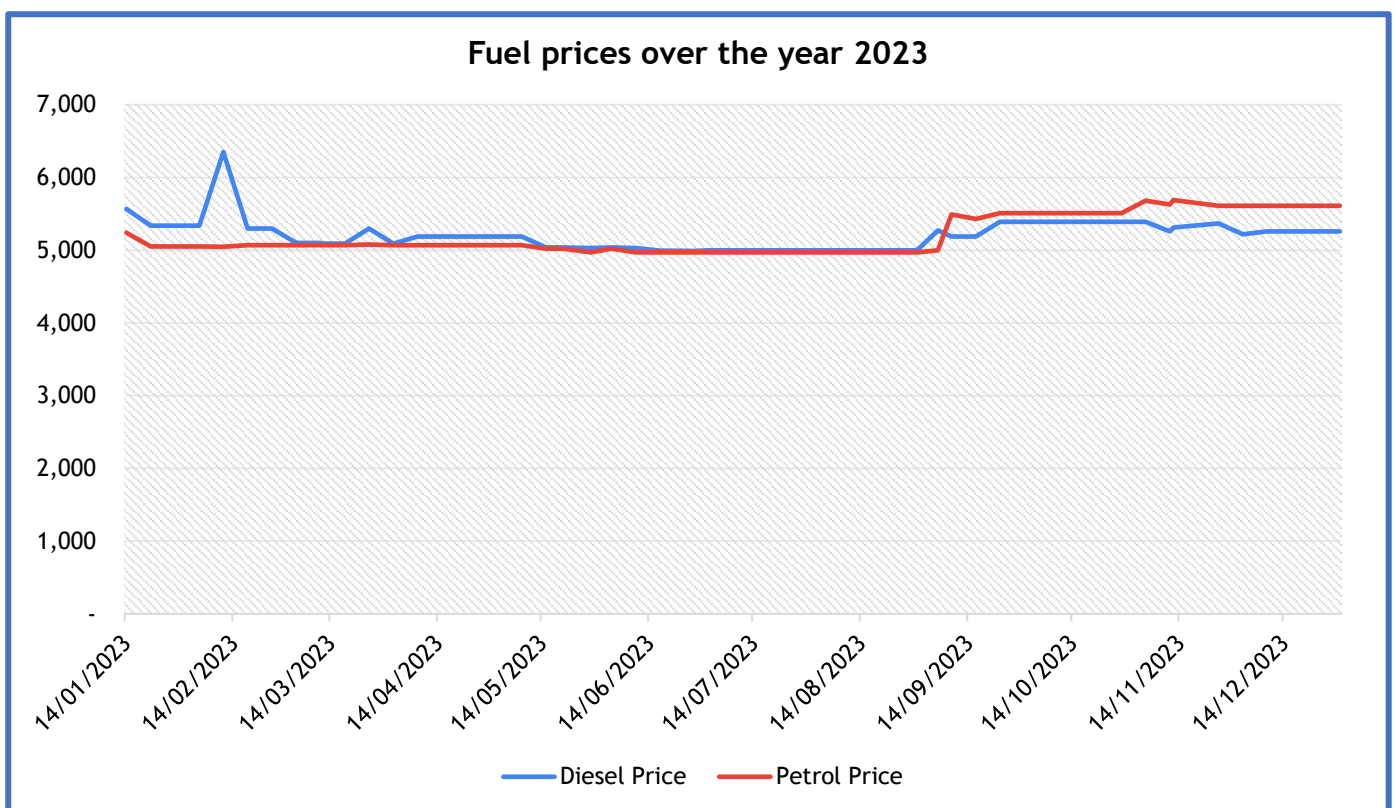
### 3.1.18 Kampala to Kasese



Transport fares from Kampala to Kasese demonstrated relative stability throughout the year. The fares began at 40,000 UGX in January, experienced a slight increase to 50,000 UGX, and then stabilized. A significant increase occurred during Christmas Eve when fares surged from 45,000 UGX in October to 90,000 UGX, indicating a substantial 100% increase. However, by the 30th of December, fares dropped back to 40,000 UGX, aligning with the initial fare at the beginning of the year.

The observed fluctuations in fares were influenced by seasonal demand, economic factors, or specific events impacting transportation dynamics like fuel prices. The significant increase during Christmas Eve likely reflects heightened demand during the festive season. The subsequent decrease by the end of December suggests a responsive adjustment in pricing, resulting in a return to a more stabilized fare compared to the peak during the Christmas season.

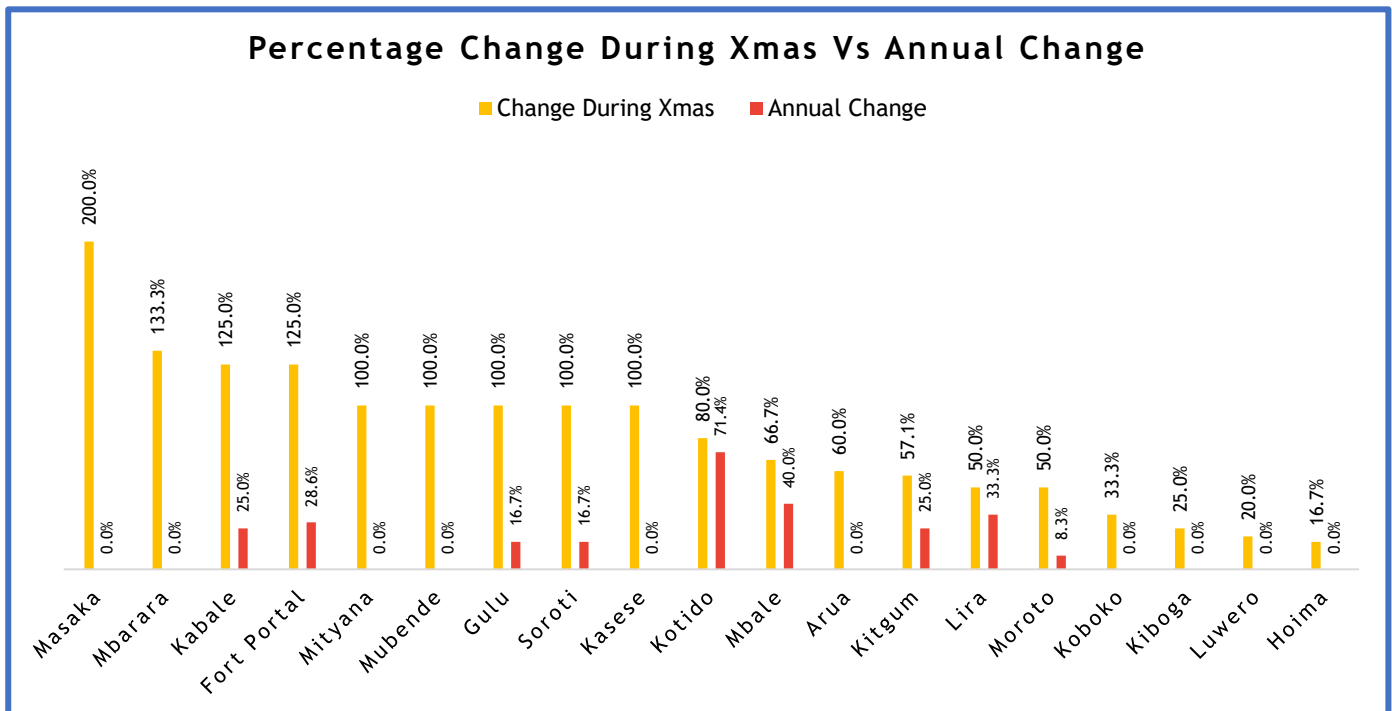
### 3.1.9 Price of Fuel



The year commenced with elevated fuel costs for both petrol and diesel. In January, petrol was priced at 5,240 UGX per litre, and diesel stood at 5,565 UGX. Fuel prices began a gradual descent around March, reaching their lowest point in August. However, towards the end of the year, there was an upward trend in fuel prices.

By the close of the year, the price of petrol per litre had risen to 5,610 UGX, indicating an annual increase of 7.06%. In contrast, the price of diesel experienced a decline, dropping to 5,260 UGX per litre, representing a decrease of -5.48% over the course of the year.

### 3.2 Observed changes during Christmas Vs Annual change in fares



Fares from Kampala to Masaka experienced the most significant spike during the Christmas season, with a staggering 200% increase. Following closely were routes to Mbarara at 133.3%, and Kabale and Fort Portal at 125%. Other notable increases during the festive season included Mityana, Mubende, Gulu, Soroti, and Kasese, all with a 100% fare increase. Kotido witnessed an 80% increase, while Mbale experienced a 66.7% rise. Arua recorded a 60% increase, Kitgum at 57.1%, and both Lira and Moroto with a 50% increase. Koboko observed a 33.3% increase, Kiboga at 25%, Luwero at 20%, and Hoima with the least increase at 16.7% during the Christmas season.

In the annual scan, Kotido showed the highest overall change in fares throughout the year with a notable 71.4% increase. Mbarara followed with a 40% change, Lira with a 33.3% increase, Fort Portal at 28.6%, and both Kabale and Kitgum with a 25% change. Gulu and Soroti each experienced a 16.7% increase, while Moroto saw an 8.3% rise. The rest of the towns did not register significant annual changes in transport fares by the end of the year.

#### 4.1 CONCLUSION

In conclusion, the analysis of public transport fares and fuel prices in Uganda throughout the year reveals a dynamic and intricate landscape influenced by various factors. The transport fare dynamics, particularly during the Christmas season, showcased remarkable variations across different routes. Masaka experienced the highest spike at 200%, followed closely by Mbarara, Kabale, and Fort Portal at 133.3% and 125%, respectively. Other towns also witnessed varying degrees of increases during the festive season.

Examining the annual scan, Kotido emerged as the town with the highest overall change in fares throughout the year, showing a significant 71.4% increase. Mbarara followed suit with a 40% change, while Lira, Fort Portal, Kabale, and Kitgum each displayed a 25% increase. Gulu and

Soroti registered a 16.7% increase, and Moroto saw an 8.3% rise, reflecting the diverse patterns observed across different regions.

In parallel, the analysis of fuel prices indicates a fluctuating trend throughout the year. The initial months saw high costs for both petrol and diesel, with petrol priced at 5,240 UGX per litre and diesel at 5,565 UGX. Subsequently, fuel prices experienced a decline until August, after which there was an upward trajectory. By the end of the year, the price of petrol per litre had increased by 7.06% to 5,610 UGX, while diesel had decreased by -5.48% to 5,260 UGX per litre.

These findings underscore the intricate interplay of factors shaping transportation dynamics in Uganda, including seasonal variations, external events, and the influence of fuel prices. Policymakers, transport authorities, and stakeholders can leverage these insights to implement targeted strategies aimed at enhancing the efficiency, accessibility, and affordability of public transportation across different regions. The understanding of these dynamics is pivotal for fostering a resilient and adaptive transportation network that meets the evolving needs of the Ugandan population.