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Coffee with a splash of tourism: the potential for coffee tourism as a tool for Inclusive growth in Uganda

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Coffee With A Splash Of Tourism:

**The Potential For Coffee Tourism As A Tool For Inclusive Growth
In Uganda**

Café avec une goutte de tourisme :

Le potentiel du tourisme du café comme outil de croissance inclusive en
Ouganda

Mémoire présenté pour l'obtention du

Diplôme de Paris 1 - Panthéon Sorbonne

MASTER MENTION "TOURISME" (2^e année)

Parcours Management of International Tourism

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Abstract

Using qualitative interviews and document research, this study investigates the potential for coffee tourism as a tool for inclusive growth in Uganda. This work contributes to the body of knowledge around coffee tourism by filling a previously unexplored gap about Uganda as it relates to this type of tourism, exploring public and private stakeholder perspectives along the coffee and tourism value chains.

Keywords: Uganda, coffee, tourism, agrotourism, development

Abstrait

Au moyen d'entretiens qualitatifs et de recherches documentaires, cette étude examine le potentiel du tourisme du café comme outil de croissance inclusive en Ouganda. Ce travail contribue à l'ensemble des connaissances sur le tourisme du café en comblant une lacune jusqu'ici inexplorée sur l'Ouganda en ce qui concerne ce type de tourisme, en explorant les perspectives des parties prenantes publiques et privées le long des chaînes de valeur du café et du tourisme.

Mots-clés : Ouganda, café, tourisme, agrotourisme, développement

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Acronyms

ALOS	Average Length of Stay
CQI	Coffee Quality Institute
EPRC	Economic Policy Research Centre
FAQ	Fair Average Quality
FNC	National Coffee Fund (“Fondo Nacional del Cafe”)
GAP	Good Agricultural Practices
GDP	Gross Domestic Product
IACO	InterAfrican Coffee Organisation
ICC	International Coffee Council
ICO	International Coffee Organization
KNCU	Kilimanjaro Native Cooperative Union
LDC	Least Developed Country
MAAIF	Ministry of Agriculture, Animal Industry and Fisheries
MOU	Memorandum of Understanding
NaCORI	National Coffee Research Institute
NARO	National Agricultural Research Centre
NCP	National Coffee Policy
NCS	National Coffee Strategy
NGO	Non-Governmental Organization
NSC	National Steering Committee
NUCAFE	Center For Agribusiness & Farmer Entrepreneur Enhancement
OCFCU	Oromia Coffee Farmers Cooperative Union
OECD	Organisation for Economic Co-operation and Development
SCA	Specialty Coffee Association
SCFCU	Sidama Coffee Farmers Cooperative Union
TRS	Tourism Revenue Sharing
UCF	Uganda Coffee Federation
UCDA	Uganda Coffee Development Authority
UCP	Uganda Coffee Platform
UGX	Ugandan Shilling
UNBS	Uganda National Bureau of Standards
UNESCO	United Nations Educational, Scientific and Cultural Organization
USAID	United States Agency for International Development
UTB	Uganda Tourism Board
UWA	Uganda Wildlife Authority
YCFCU	Yirgacheffe Coffee Farmers Cooperative Union

1. Introduction

1.1 Coffee with a splash of tourism

Of the approximately 25 million families connected with coffee production worldwide, many are unable to earn a reliable living from the coffee they produce (Fairtrade, n.d.), an uncertainty that impacts the livelihoods of an estimated 100 million people. This is despite their contributions to the estimated 2.25 billion cups of coffee consumed daily (Avey, 2013) and worldwide coffee exports totaling more than US\$31 billion (Workman, n.d.).

As coffee producers and coffee-producing countries consider ways to improve their circumstances, the link between agriculture and tourism is often presented as an opportunity (International Trade Centre, 2010, 1). Research into the specific relationship between coffee and tourism finds two trends pushing this union (Chen et al., 2021, 2). One trend is the volatility of coffee prices. This reflects inevitable fluctuations of commodity markets but is also exacerbated by variations in the climate, especially the amount of rainfall and changing temperatures, which impacts the available supply of coffee from coffee-growing regions (Woyesa & Kumar, 2020, 816) (Bunn et al., 2014, 2) (Mulinde et al., 2019, 40).

The second trend is connected to the desire of producers in developing countries, particularly small and medium-sized farmers, to gain more autonomy from a commodity from which their livelihoods are largely determined by price volatility established in distant commodity markets (Ponte, 2002, 1106). For those coffee farmers, tourism offers the prospect of generating an additional livelihood option over which they have more control.

Tourism has historically been an economically significant industry. In 2019, it was a sector that accounted for 334 million jobs and contributed 10.4% of the total GDP around the world (WTTC, n.d.). With the economic force of travel and tourism, linkages to different agriculture segments could be a reliable way to provide economic support. But when it comes to coffee-producing countries, what are the realistic expectations for the impacts of tourism to benefit both coffee producers and the country's economy as a whole?

1.2 Understanding coffee tourism

As a type of tourism niche, coffee tourism covers the experiences tied to coffee's consumption, history, tradition, culture, products, and features. This includes visits to countries where coffee is grown for tours of plantations and farms where tourists interact directly with producers, learn about coffee's cultivation and production, participate in activities like harvesting, roasting, and tasting, and purchase souvenirs (Jolliffe & Kleidas, 2010, 3).

Coffee tourism has similarities to other culinary tourism offerings such as wine and tea tourism. Like those, coffee tourism's development has led to natural resource and cultural heritage conservation as the narrative of the coffee producers draws sustained attention, creating economic opportunities through which agricultural-associated traditions can add further to the tourism experience (Karlsson & Karlsson, 2009, 9).

Expanding on the idea of traveling to see where coffee is grown, Jolliffe and Kleidas developed a framework to categorize coffee attractions. They include:

- Natural Attractions** - tropical mountains, shade-grown coffee plantations, full-sun coffee plantations
- Human Made - Not Originally Designed to Attract Tourists** - coffee houses, coffee roasting facilities, coffee machine factories, coffee farms, coffee mills, coffee shops
- Human Made - Purpose-Built to Attract Tourists** - coffee museums, coffee theme parks
- Festivals & Special Events** - coffee festivals, coffee exhibitions, coffee competitions, coffee cupping, coffee harvesting

In this way, coffee tourism can begin with natural attractions and the fundamentals of coffee production, while being developed later to create more specific attractions based on tourist demands.

Tea tourism has followed a similar model in areas that have a long history of tea cultivation, like China (Huang, 2006, 586) and Sri Lanka (Fernando et al., 2017, 72-73). Similar to coffee, the potential for developing tea tourism is seen in the available resources, like tea plantations, which can be leveraged through a strategic promotional plan, government incentives, and the development of homestays. That development can result in tourism's ability to improve a tea-producing destination's brand image and

marketing, encourage tea consumption, and provide tea-producing estates with a doubled income. In both studies, however, regulations, seasonality, and a lack of capital have prevented tea tourism’s benefits from being spread equitably to all stakeholders. For the similarities mentioned, it is tempting to apply the tea tourism framework to coffee tourism to see if the same benefits hold true for coffee-producing countries and coffee tourism, too.

There is already evidence of coffee tourism in the top 10 coffee-producing countries in the world. As seen in Table 1, each destination offers at least a private estate coffee tour, which establishes a shared interest across regions in welcoming tourists to the coffee-production experience.

Table 1 - Top Coffee Producing Countries

Country	Coffee Produced (Metric Tons)	Example of Private Estates Offering Coffee Tour
Brazil	2,595,000	Sao Paulo Coffee Estate Tour
Vietnam	1,650,000	Me Linh Coffee Garden
Colombia	810,000	Finca el Ocaso in Salento
Indonesia	660,000	Satria Coffee Plantation
Ethiopia	384,000	Limmu Kossa Coffee Estate
Honduras	348,000	Finca Santa Isabel
India	348,000	Mercara Gold Estate
Uganda	288,000	Bulansuku Farm Estates
Mexico	234,000	Finca Hamburgo
Guatemala	204,000	Finca Filadelfia Coffee Resort

(International Coffee Organization, n.d.)

But private estates offering coffee tours, while a sign of coffee tourism’s existence, does not automatically signify benefits for smallholder coffee farmers. While coffee-related tourism has the potential to be an instrument of social change in the form of sustainable development (Jolliffe & Kleidas, 2010, 6), realizing that potential remains a challenge. The concept of inclusive growth can feature several aims but generally is focused on what the OECD calls “economic growth that creates opportunity for all segments of the population and distributes the dividends of increased prosperity, both in monetary and non-monetary terms, fairly across society” (OECD, 2014, 80). Applying this lens, a push for cooperation and collaboration could lift coffee tourism to a sustainable endeavor that might reduce inequalities, benefit genders equally,

and provide more educational and employment opportunities for youth.

As seen in several comparative studies (Armendariz, 2018) (Lyon, 2013) (Wang et al., 2019), coffee tourism can be managed at various levels, from established private estates and community groups to international development agencies. Each reflects a way in which coffee producers can shape their regional image in the marketplace (Jolliffe & Kleidas, 2010, 9), but what level of implementation and coordination is needed to drive benefits to the whole community? Some examples of that coordination, as well as the benefits, can be seen by looking at existing coffee tourism products.

1.3 How coffee tourism impacts a destination

Coffee tourism has impacts throughout the tourism value chain, from inbound tour operators and transportation companies to accommodations and the producers and guides who lead the tours. The development of coffee trails and routes might also enhance a destination's attractiveness, encouraging more expenditure and longer stays for international tourists for an impact that would be seen in a destination's macro-economy. Research, however, finds coffee tourism's distributional effects currently limited to the individual and community level, though the involvement of international tourists does mean at least some impact on other tourism enterprises.

Where that economic impact is most visible to date is with those responsible for coffee production. The promise of coffee tourism is the additional flow of income while also giving farmers more control by allowing them to negotiate prices directly through connections with guides, accommodations, and inbound tour operators.

Though the allure of boosted revenue and economic agency is compelling, the addition of tourism to an agricultural community is not without its risks. This can include the dispiriting feeling that the community or coffee farmer lacks control over the future development of tourism. Likewise, the inability to attract tourists can hurt producer motivation to continue with tourism since they are often reliant on an intermediary to recommend them, like a tour operator, guide, or accommodation, or some other broker (Höckert, 2011, 63). There are outlays involved as well, from the acquisition of tools and support structures to training, meaning a lack of tourist flows can present financial burdens, too.

Gains from introducing coffee tourism should not obscure the idea that investments into other, more traditional economic activities could be better for stakeholders by inviting less economic uncertainty than introducing a completely new activity like tourism (Gascón, 2013, 722). For coffee farmers, that traditional activity might be focusing on the quality of their coffee and the yield of their harvest. Additionally, the planning and implementation of tourism can also lead to negative feelings between hosts and the communities (Höckert, 2011, 53) on the small-scale, as in when promised tourist flows are not delivered, or a more systemic breakdown on larger scales that occurs even when funding and collaboration are happening between national governments (LuxDev, 2017).

As a development tool, though, the benefits of coffee tourism are real. It can stimulate greater tourism flows that lead to incomes that are more evenly distributed throughout the year. For families accustomed to coffee prices fluctuating and only receiving payments after twice-yearly harvests, more consistent incomes from tourism provide stability. Coffee tourism revenues can have an impact on the community, too, allowing for investments in projects, maintaining roads, building classrooms, and even the construction and launching of other businesses (Karlsson & Karlsson, 2009, 42). The implementation of tourism also delivers capacity building among youth and women who may not have been previously able to contribute as they learn new skills connected with tourism development (Höckert, 2011, 69).

The field of research around coffee tourism is slowly emerging. The results in Table 2 are from a systematic literature review of coffee and tea tourism and show the specific countries that have been the subject of studies, including Tanzania, Rwanda, and Ethiopia (Chen et al., 2021, 14). While this study ultimately sourced 30 articles about coffee tourism in general, a comparison to a similar wine tourism literature review from 2006 found over 160 articles about wine in a similar timeframe (Mitchell & Hall, 2006, 308-312), suggesting coffee tourism has been much less intensively studied and, in Africa, which produces 12% of the global coffee supply (The African Development Bank Group, 2010), almost completely overlooked.

Table 2: Coffee papers by year and context (frequency)

2010	2013	2014	2015	2016	2017	2019	2020
Taiwan (1)	Guatemala (1) Mexico (1) Indonesia (1)	Rwanda (1)	Tanzania (1)	Indonesia (1)	Philippines (1)	Costa Rica (1) Indonesia (1) Philippines (1) Taiwan (1) Thailand (2)	Brazil (3) Colombia (1) Ethiopia (1) Honduras (1) Indonesia (4) Italy (1) Singapore (1)

Notable in the available studies about coffee tourism is the omission of several top 10 coffee-producing countries like Vietnam, Uganda, and India. Of those three, Uganda is considered to have the third-best coffee in the world (Coffee Quality Institute & Bean Poet, 2020) behind Ethiopia and Kenya, in a survey of 1,229 coffees tasted from 2010-2018 by professional coffee tasters certified by the Coffee Quality Institute (CQI), a non-profit organization that works internationally to improve the quality of coffee.

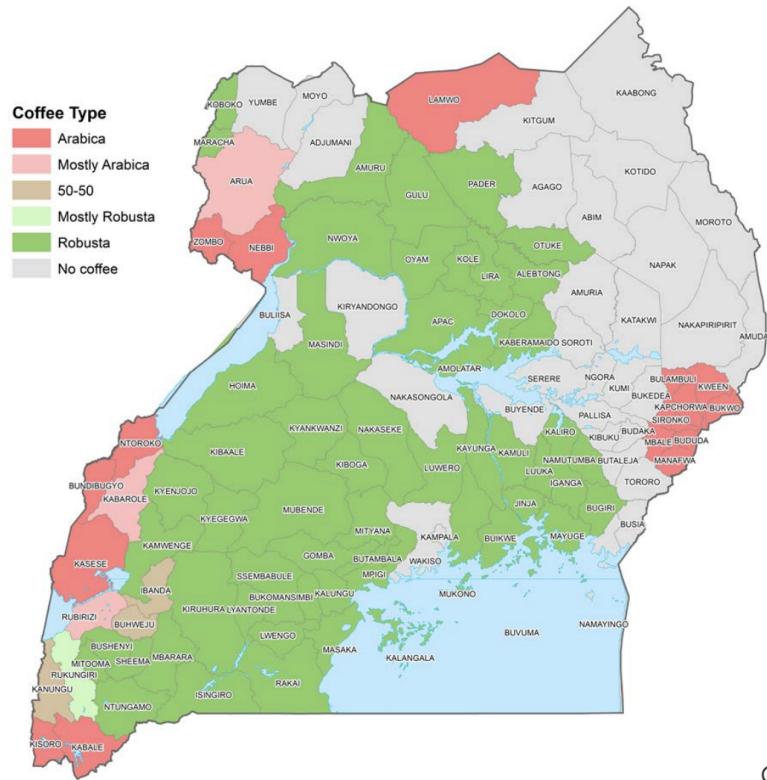
Uganda’s combination of coffee production and coffee quality, along with a lack of existing research, suggests it merits further study into the feasibility, benefits, and risk of coffee tourism, an analysis which will also take into account the status of Uganda’s tourism sector as a whole.

1.4 Coffee in Uganda

Overall coffee production in Uganda is trending upwards. Uganda’s exporting volumes and earnings have increased in terms of volume and total value since 2014. That increase - from 3.24 million 60-kg bags in 2014 to 5.36 million bags in 2020 (Khisa, 2020) - is a part of the Ugandan government’s plan to be producing 20 million bags annually by 2025-2030 and to improve livelihoods in 1.5 million households (Uganda Coffee Development Authority, 2017). This growth has also made Uganda the top exporting coffee country in Africa. As Uganda’s most important agricultural export, coffee contributes 19% of total national formal export value (Uganda Country Coffee Profile, n.d.).

Despite these positive indicators, stakeholders find that coffee production in Uganda is still affected by low productivity, low quality, and struggles with pests and diseases, as well as a lack of equipment that could assist with more advanced process techniques like on-farm washing for arabica beans (Mwesigye et al., 2020, X).

Figure 1: Arabica and Robusta Growing Regions, Uganda



Source: Morjaria & Sprott, 2018

Uganda’s annual coffee production is made up of 85% robusta and 15% arabica (Uganda Coffee Development Authority, 2017). Uganda is the fourth-largest producer of robusta in the world, behind Vietnam, Brazil, and Indonesia. Robusta, which is typically used for instant coffee and espresso, is grown in the low altitude regions of Uganda and can be found in Central, Eastern, Western and South-Eastern Uganda.

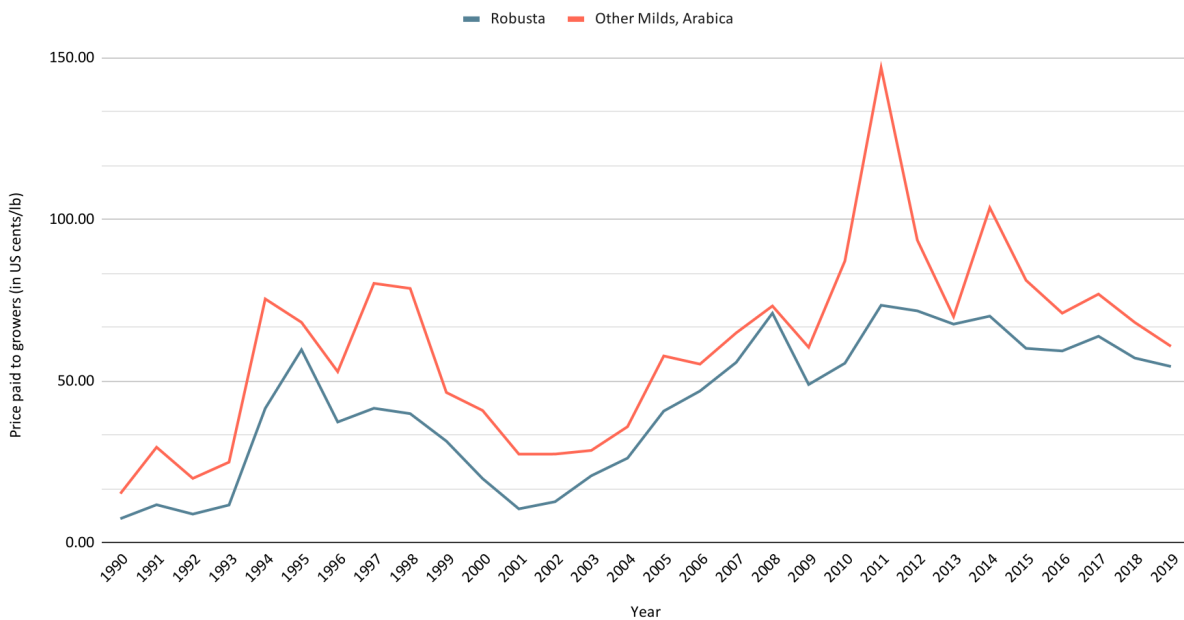
Arabica, which is more commonly found in brewed coffees because of its fuller flavor, is grown in three regions in Uganda, including the areas near the slopes of Mt. Elgon on the eastern side and Mt. Rwenzori and Mt. Muhabura in the southwestern region (1,500-2,300 meters above sea level). It can be grown intercropped with bananas and beans, a method that helps stabilize households’ food security. With an eye toward sustainable production, arabica coffee is also grown among shade trees with minimal use of agrochemicals like fertilizers, pesticides, or fungicides (Ahmed, 2012, 6).

In Uganda, there are 1.7 million smallholder farmers working very small farms with an average size of 0.18

hectares (Uganda Investment Authority, 2016). The average coffee farmer in Uganda earns only US\$435/year, less than the PPP-adjusted poverty line for Uganda of US\$2,077/year/household. The poverty line is set by the World bank at US\$3.10 per person per day and adjusted for the average household size in each country. The below-average revenue for Ugandan coffee farmers is explained “by relatively low coffee revenues as well as almost negligible off-farm and in-kind income in these countries” (Fobelets et al., 2017, 18). An estimated 85% of coffee farmers have intercropped farms, so only a portion of their plots are being used for coffee (Mugoya & Global Coffee Platform, 2018, 1). With coffee production so low for the majority of farmers, even impressive yields and market-high prices would not be sufficient to generate a livelihood enough to support a family.

Those insufficient yields are exacerbated by the continued volatility of coffee pricing. Those prices are affected by factors from climate change and disease, the amount of product sent to market by other countries, and long rainy seasons affecting the quality of beans available to sell in Uganda (The Independent, 2020). Quality certifications are another factor that affects pricing. Currently, only 3% of Uganda’s exports are verified or certified sustainable, below the global average of 8% (Uganda Coffee Development Authority, 2017).

Table 3 - Price Paid to Growers for Ugandan Robusta and Arabica Coffee Beans



(International Coffee Organization, n.d.)

On the international market, those fluctuations are dramatic, and as demonstrated in Table 3, they result in volatility for the prices paid to growers. For robusta beans, the amount farmers have received has fluctuated by an order of magnitude between per-pound prices of US\$0.08 (US\$0.16/kilo) and US\$0.72 (US\$1.58/kilo) since 1990. For arabica beans, the range has been even more marked, from US\$0.15 per pound (US\$0.33/kilo) to US\$1.47 (US\$3.24/kilo).

Farm yields vary based on the farming techniques employed. For arabica beans, the least involved method - Traditional - results in an average yearly yield of 179.9 kgs/acre. The more involved process - Improved - results in 472.7 kgs/acre. The next category - Recommended - results in yields of 805.1 kgs/acre. Given 98% of Uganda's coffee is grown on smallholder coffee farms of 200 trees or 0.44 acres (Uganda Coffee Development Authority, 2017), an Improved-level farm could expect to produce around 210 kg of arabica beans.

Given the cost of Good Agricultural Practices (GAPs) and varying yield levels, gross margins are used as a way of assessing an agricultural enterprise's financial returns. From a 2018 report, the gross margin for a Traditional acre was US\$345.4, Improved was US\$646.6, and Recommended was US\$924.6. At 0.44 acres, those three levels return US\$151.4, US\$284.4, and US\$406.8. A report by Fairtrade International and True Price finds similar numbers, suggesting the average income for a Ugandan coffee farmer is US\$435, of which US\$306 of that comes from coffee production (Fobelets et al., 2017, 41),

1.5 Tourism in Uganda

Uganda is 128th in the world in the relative size of travel and tourism's contribution to its GDP (World Travel and Tourism Council, 2018, 8). In comparison with neighboring Kenya (ranked 71st) and Tanzania (ranked 89th), tourism in Uganda is under-developed. The modest size of the sector is seen in the labor force, where 6.7% of total national employment in 2018 was tourism-related jobs, as well as in tourists themselves, with 1.5 million international arrivals (CBI Ministry of Foreign Affairs, 2020).

Furthermore, Uganda is not capitalizing on tourism in the same way as its neighbors. The total contribution of travel and tourism expenditures in Uganda amounted to 6.2% of GDP in 2019, which is less than neighbors like Rwanda (11.4% of GDP), Tanzania (10.7% of GDP), Kenya (8.2% of GDP), and Ethiopia (6.8% of GDP), but better than the Democratic Republic of Congo (1.9% of GDP) (WTTC, 2021). In

Uganda, tourism's economic impact falls short of the potential suggested by the resources and geographical similarities of its neighbors. Though leisure tourist spending makes up a high percentage of the overall visitor expenditure in Uganda (89%), they only make up 25% of Uganda's tourist arrivals (about 126,000). This compares poorly to Kenya and Tanzania, where more than 75% of their total visitors travel for leisure (World Bank, 2020, 40). Uganda's neighboring countries also receive between 3-6 times more European visitors, suggesting the limiting factor is the size of tourist flows to Uganda (CBI Ministry of Foreign Affairs, 2020).

Understanding the leisure tourist market, especially in comparison to neighboring countries that derive so much more of their tourism from it, is essential. In Uganda, those tourists spend the most on their visits (followed by "Education & Training" with an average of US\$948 and "Business & Professional" trips at US\$791) and can be influenced by policy interventions that could extend the length of stay. Whilst comparatively small, those tourist visits to Uganda still resonate in the economy. Each foreign tourist dollar spent in Uganda generates US\$2.50 of benefit through direct, indirect, and induced effects (World Bank, 2020, 36), meaning that tourist spending in Uganda has significant positive impacts throughout the economy. The average expenditure per tourist was found to be US\$897, with the highest average coming from leisure tourists, who spent US\$1,091 on trips in 2019 that were on average between 12 to 13 days. That figure is on par with the 2012 number of US\$1,146, with the slight drop attributed to a non-significant difference due to pricing adjustments.

To amplify tourism's impact in Uganda, its development could be pushed along two routes, according to projections by the World Bank. The first scenario estimated that an additional 100,000 leisure tourists could add US\$100 million to tourism exports for a value add of 0.4% to 0.9% to the GDP. The second estimated that if all of the tourists that visited Uganda in 2019 (not just leisure) had stayed an additional night, tourism exports could have been increased by US\$67 million, adding 0.3% to 0.7% to the GDP. There is, then, nearly as much economic power in developing activities that could motivate additional in-country spending and extending the average length of stay (ALOS) as there is in attracting more tourists.

If coffee tourism could be developed to such a level that it either attracted a significant number of tourists who would not otherwise have visited Uganda or was a compelling enough activity for visitors to stay an additional night, its impacts could be substantial.

1.6 Coffee tourism in Uganda

In April 2017, Uganda announced a Coffee Road Map with nine initiatives to transform their offerings, including support for local businesses, farmer organizations, and coffee financing to impact up to 1.5 million households (Uganda Coffee Development Authority, 2017). Coffee is identified as an export product to invest in, and coffee tourism seems to be following suit, with stakeholders showing interest in its development with a joint symposium being held in 2018 by the Uganda Tourism Board and the Uganda Coffee Development Authority.

With Uganda's underdeveloped tourism sector, other possible tourism products may be a way to promote the chances for social-economic development. Given that the Ugandan government has demonstrated interest in adopting an innovative policy in the coffee industry, this research is focused on whether coffee tourism has the potential to stimulate a more vibrant growth in these two sectors, as well as what practical steps are necessary to deliver on this potential if it exists.

With so many stakeholders involved, communities affected, traditions to consider, and the government's influence, the benefits of this kind of tourism in Uganda are yet to be fully understood. Just because the government would like to introduce more coffee tourism doesn't mean that communities will see the benefits. Just because a tour guide wants to connect with a farmer to create a tourism product doesn't mean the benefits will be spread equitably throughout the community. Adding tourists to that mixture brings new pressures in terms of visibility, resources needed, and delivering consistent outcomes.

With that, this research aims to build on the groundwork established by other coffee tourism investigations around the world, as well as the continued and sustained interest in coffee production in Uganda, by asking:

What is the potential for coffee tourism to be a tool for inclusive growth in Uganda?

Answering this question will require further research centered on the following sub-questions:

1. Does Uganda have the preconditions for successful coffee tourism demonstrated elsewhere?
2. Are the actors required to develop a successful coffee tourism value chain in Uganda present and do they have the interest and capabilities to develop this product?
3. If successful, could coffee tourism generate inclusive growth in Uganda?

4. What are the prospects for successful coffee tourism in Uganda?

This research follows two lines of inquiry to see whether a synthesis between the government-supported coffee sector and the under-developed tourism sector could generate a new and viable tourism product – coffee tourism – to deliver inclusive growth in Uganda. This paper will evaluate the potential for the inclusion of tourism in the sustainable coffee value chain to see the role that both producers and public entities could play in achieving a sustainable form of coffee tourism.

As coffee tourism varies widely in its implementations and its host environments and is necessarily dependent on the already existing infrastructures of the region, its effectiveness in improving outcomes and reducing poverty in those settings varies. By focusing on the whole value chain and tracing the links, this research aims to quantify the impacts of tourism in the region.

To answer these questions, a combination of desk work and remote interviews will be done by following the first steps of a value chain analysis. The discussion of these theoretical concepts will be continued in the following section. After that will be an explanation of the methodology of the research, including information about data collection and analysis. Then that research will be applied to each of the sub-questions. The final section will present a conclusion of the findings and an answer to the question of coffee tourism's potential to deliver inclusive growth in Uganda, along with a bibliography and appendices.

2. Literature Review

To begin to answer the first sub-question, a review of the existing literature was undertaken. First, the implementation of coffee tourism is discussed, both in the context of the international community, then within the regional context of East Africa, followed by an analysis of the ways governance, cooperation, and private stakeholders can affect this kind of tourism, to be then concluded by a discussion of the tourism and coffee value chains impact in Uganda.

2.1 Conditions for the implementation of coffee tourism

One country where coffee tourism's development has proven impactful is Colombia. This is due in large part to the 'Coffee Triangle' (Eje Cafetero) region, which was declared a United Nations Educational,

Scientific and Cultural Organization (UNESCO) World Heritage Site in 2011 for being “an exceptional example of a sustainable and productive cultural landscape that is unique and representative of a tradition that is a strong symbol for coffee growing areas worldwide” (UNESCO, 2011). The region alone has approximately 24,000 coffee farmers through which 80,000 people earn a livelihood through coffee. The UNESCO designation encourages both residents and visitors to value the area and its preservation. One way that is realized is through coffee tourism, which exists in Eje Cafetero in several forms, including tours to coffee farms, the renovation of the historic haciendas into accommodation, and a coffee-themed cultural park (“Parque del Cafe”) that opened in 1995. As an example of the park’s influence alone, it has grown from drawing 250,000 visitors in its first year to averaging over 1 million visitors to the region from 2015 to 2019 (Themed Entertainment Association & AECOM, 2019). In recent years, international travelers to Colombia have increased, with a targeted flow straight to the Eje Cafetero of 41,000 foreign tourists in 2017 (Czerny et al., 2018, 92). At the same time, agrotourism has shown to be a sustainable strategy that protects the natural areas, raises production quality, and positively affects farmers’ incomes (Duursma, 2016, 63).

As recognized in the management plan for the Eje Cafetero region, this type of tourism connects visitors with the local place and culture while providing local owners the resources necessary to maintain their farms. This plan emphasizes the need for continued sustainable development with an acknowledgment that tourism requires “planning, implementation, and controls, such that these efforts produce improvements in the local population’s quality of life in addition to a better understanding and higher respect for the local culture by the visitors” (Ministry of Culture, Colombian Coffee Growers’ Federation, 2009, 50).

Coffee tourism is multi-sectoral and includes local producers, national government, international stakeholders, development groups, inbound tour operators, and online travel agencies. A practical and sustainable policy, with consistent participatory implementation, can lead to shared benefits, just as the lack of follow-through or the commitment to implementing a bad policy can limit them. One such example is seen in a Nicaraguan project intended to promote and market a unified trail of coffee, the Ruta del Café. This joint project between the Government of the Republic of Nicaragua, the Nicaraguan Tourism Institute, and LuxDev (Luxembourg Agency for Development Cooperation), stagnated at a high cost to investors and farmers alike. On a scale of 1 (excellent results) to 6 (unsuccessful, the situation has worsened), the project’s global post-project evaluation came in at a 5, with specific marks of 3 for

relevancy, 5 for efficiency, and 4 for sustainability (LuxDev, 2017). The final debriefing identified five results that are relevant to the implementation of coffee tourism elsewhere:

Objective	Findings
Transfer of Competences and Appropriation of National Counterparts, especially to National Institute of Tourism	Significant weaknesses in management expectations Low level of budget execution and poor compliance with objectives Little local participatory planning due to limited delegation of powers Unmet objectives of strengthening Union of Tourism Cooperatives to lead cooperative tourism development
Tourism Planning and Public Tourism Investments in the Territory	Shortcoming of essential local participatory tools and decentralized management Lack of information to measure its impact Difficulty in obtaining data Design of public infrastructure, like route signs, was conducted, but installation was left pending.
Training of Human Resources	Issues aligning professional education and training systems Direct observation showed improvement, there was a continued lack of data, reports, or surveys Educational offerings didn't coincide with specialties (e.g. tourist guides taking classes in French or Asian cooking, though no hotels, restaurants offer that style)
Technical Assistance and Access to Finance for Micro, Small, and Medium Tourism Enterprises	Even with tourism businesses developing, credit was difficult to secure because of an unactivated agreement with the bank
Promotion and Marketing	No strategy to turn Ruta del Café into an attractive regional tourist destination, activity suspended Proposed implementation of biannual surveys of the tastes and interests of tourists stopped after the first initiative

There may be myriad reasons why the project was not considered a success, but the last point underscores the most important one: a failure to turn the area into a tourist destination, or, a lack of tourists, without which tourism does not work. Without tourists, there are no benefits to spread. So a top-down approach led by the government is less essential than first having tourist flows.

On the potential precondition of how tourism is planned and organized, a case study from El Salvador demonstrates the differences between coffee estates and cooperatives. The coffee estate offered a controlled, safe experience to share the culture and history of coffee production with international tourists, though local participants shared that coffee tourism did not personally impact them.

Cooperatives, by contrast, saw more personal impacts but also more mixed results: one has not been able to sustain their tourism efforts because of the costs, while another has been able to offer youth employment as guides and attract tourists (Armendariz, 2018, 74).

Further evidence suggests that the coffee estate is capturing more of the benefits of coffee tourism given their location on an established tourism route, compared with cooperatives of coffee smallholders that are removed from the main tourism flows. Though tourism clustering can have local benefits like creating economies of scale and synergies, growing technological and organizational know-how, and reducing uncertainty (Nordin, 2003, 33), this type of competition over so little tourism highlights the larger concern once again: tourism projects without tourism don't work. In this instance, coffee tourism that is working is only working by tapping into existing flows, not by creating new ones.

In turn, the coffee estate in El Salvador, which turned to tourism to offset low coffee export prices, receives more revenues from coffee tourism than the cooperatives. This supports the coffee estate, positioning it better to continue operating and offering employment. But its socioeconomic support might be limited without the training programs and additional services more explicitly offered to employees or community members, as is seen with the cooperatives. What's more, the reduced tourist flows to the community reduces their potential revenue, as coffee tourism becomes less of a means to invite tourists into the process and more a tool for the private estates to make money (Armendariz, 2018, 25). As seen in the Nicaraguan example, this producer-level perspective shows that tourist flows are critical to a project's longevity.

In Guatemala, increased attention and visits to coffee tourism projects are augmenting other local businesses, enhancing the sense of culture, and contributing to fostering cultural conservation (Lyon, 2013, 195), but this development is uneven and unequally spread across stakeholders. The coffee tour's lower-than-expected income gains can be explained by poor coordination with other local tourism businesses, agrotourism attractions, and overall marketing misfires. Unequal economic development is a real risk with this kind of endeavor, as a lack of expertise, capital, or interest prevents certain stakeholders from benefiting while the whole community bears the tangible and intangible impacts of tourist arrivals.

These examples from Latin America suggest that the key issue in determining coffee tourism's validity is whether they can generate sufficient enough tourism flows to sustain businesses. Without that

foundation, the other concerns become irrelevant. Given an adequate tourism flow, coffee tourism's distributional impact is determined by the nature of the offering, be it plantation, smallholder farm, or community project.

The evidence suggests it can work well with plantations but incorporating smallholder farmers alone into a viable coffee tourism chain may be more difficult. In part, this is because they are located away from main tourist flows and lack the capacities (human resources, infrastructural, financial) to offer a coffee tourism product like a plantation may be able to. Without the proper support engaging these smallholder farmers in coffee tourism, be it through an intermediary like guides or more top-level support, they will tend to be excluded from it.

From this, preconditions for successful, inclusive coffee tourism would necessarily start with:

1. Adequate tourist flows
2. Tour operators who are willing to channel these flows to smallholder farmers and pay them reasonable rates, and
3. Smallholder farmers who can offer a quality offering that meets tourist needs.

As established, Uganda has low total tourism flows, especially in considering the leisure tourists who may make up the target demographic. Trying to match those flows with smallholder farms, with low incomes and a lack of tourism experience, requires a significant level of support for a chance at success.

That sort of community-driven development is also seen in Indonesia, which organized coffee and tourism stakeholders to assess their coffee tourism potential. They judged that potential on the numbers of plantations, the types of plantations (government-owned large plantations, private-owned large plantations, and communities' plantations), and the percentage which is owned by communities (around 96%), three variables they took to signify that sustainably implemented tourism could have an impact (Setiyorini, 2018, 155).

Having performed this assessment as a way to potentially declining coffee productions from 2012-2015 (Statista, 20210), the impact on the local economy was identified as farmers playing a part in tour package development in providing guide services, accommodation, or upgrading their crops with value-added products like souvenir beans or coffee drinks. While theoretical, this survey reveals the attractiveness of

developing tourism products on top of existing coffee production ones, as well as the advantages that come from cooperation across the industry.

Regional coffee tourism development

In considering the potential for developing coffee tourism in Uganda, it is worthwhile to see how similar coffee-producing countries in East Africa are approaching coffee tourism from a governance and cooperation level, too. Among Uganda's neighbors, Tanzania, Ethiopia, Rwanda, and Kenya all have coffee tourism in some form, though research of its tangible impacts has so far been more connected with Tanzania and Ethiopia. In these regional examples, coffee tourism has had a measurable impact on communities but encountered difficulties in scaling, even with government interest, due to problems with infrastructure, accessibility, seasonality, and the size of the farms offering the tourism experience.

Ethiopia

Ethiopia is the birthplace of arabica coffee and a country where domestic consumption of coffee is significantly higher than in Uganda. Ethiopians consumed 3.2 million 60-kg bags of coffee domestically (Tefera & Global Agricultural Information Network, 2020). By comparison, Uganda reported just 244,800 60-kg coffee bags consumed, less than 8% of Ethiopia's total. That difference in domestic consumption prevents Ethiopia from being the top coffee exporter in Africa. Their domestic support is also seen in cultural centers dedicated to coffee, including the Jimma National Coffee Museum. The country also features coffee in photos, routes, and descriptions in Ethiopia's Sustainable Tourism Master Plan (Ministry of Culture and Tourism & The Federal Democratic Republic of Ethiopia, n.d.). Similar to Uganda's predominantly smallholder coffee production, 90 to 95% of coffee production in Ethiopia is supplied by smallholder farmers with an average of less than 2 ha of land by the approximately 15 million directly or indirectly involved with its production (Tefera et al., 2014, 2).

Ethiopia's Tourism Development Policy recognizes in several places tourism's multi-sectoral nature, as well as the development potential of tourism linked to rural and agricultural areas, suggesting it could create strong ties by connecting urban and rural areas through the tourism and coffee value chains (Ministry of Culture and Tourism, 2009, 13).

Though coffee tourism is thought to have potential in Ethiopia to diversify income and protect against a changing climate and expanding agriculture (Woyesa & Kumar, 2020, 826), findings suggest that without

a viable, market-based link between tourists and coffee, coffee tourism won't be viable. One study in Bale Mountains National Park, a region relevant to Uganda for its ability to attract a similar class of high-value tourists, hypothesized that the production of local coffee and honey supplied directly to hotels and lodges could be useful in developing not only agrotourism but also in supporting pro-poor enterprises. Pro-poor policies are those which directly target poor people and are aimed at reducing poverty (Overseas Development Institute, n.d.). However, no current "practical linkage between tourism and agriculture [...] with respect to the symbiotic coexistence and market-based value scenarios" is found (Welteji & Zerihun, 2018, 12).

There are several prominent coffee organizations in Ethiopia, including three active farmer cooperative unions - OCFCU responsible for over 200,000 members (Fairtrade, n.d.), SCFCU with 85,000 farmers (Equal Exchange - Fairly Traded, n.d.), and YCFCU with over 40,000 members (Institute for Sustainable Development, n.d.) - combining to represent over 300,000 farmers. Still, communication was found to be lacking, with one researcher recommending a coffee tourism policy as a way to better establish collaboration between the central government and local ones, development agents, and both coffee and tourism stakeholders (Yun, 2014, 299-304).

Despite Ethiopia's reputation as coffee's birthplace, its indigenous coffee culture that is heavily marketed, a highly organized coffee farming sector, and being recognized as having the world's best coffee (Coffee Quality Institute & Bean Poet, 2020), coffee tourism is still at best categorized as embryonic.

Tanzania

In Tanzania, the National Tourism Policy recognizes the importance of ecotourism and tourism's cultural aspects without specifically recognizing agriculture or agrotourism (Ministry of Natural Resources and Tourism, 1999, 10-11).

Only a few years after the policy's release, research was done into this tourism subset with a study of two coffee tourism projects, one run by a cultural program (Tengeru Cultural Tourism Programme) and one run by a cooperative union (Kilimanjaro Native Cooperative Union, or KNCU). Both projects experienced increases in visitors and spending from the beginning of the study in 2004 to the end of the research in 2007. The KNCU project, which featured three sites, welcomed 218 visitors for total revenue of around 5

million Tsh (US\$2,150) in their first year. In 2007, with nearly 1,200 visitors, revenue increased to 60 million Tsh (US\$25,800).

The resulting profits were distributed back to the surrounding areas. For the community group, it was divided between the following parties: families and farmers, women's groups, community development, maintenance, local purchases, investment, and institutions. The remaining 25% of the total was retained by the KNCU office (Karlsson & Karlsson, 2009, 38).

That suggests then that in the slow build-up to US\$25,000, roughly US\$18,000 is being split between the three sites. At US\$6,000 per site, that is about US\$16.5 per day. For reference, at US\$3/person/day, a family of five with no income would require US\$5,475 per year to be raised above the poverty level. This case study shows that coffee tourism, even when backed by a strong East African union of 67 cooperatives with around 1,000 families per group (KNCU Tanzania, n.d.) cannot generate revenues sufficient enough to lift large numbers of households out of poverty.

While it is not generating enough revenue for a significant change, coffee tourism has created a more sustainable income spread throughout the year. The project's initial investment was small, intended just for the maintenance of their plantations to a clean and attractive standard. That small investment has generated enough income to allow for additional local investments in a restaurant and bar. The restaurant is in turn providing women's groups with the funding for other entrepreneurial projects. Though sponsors helped launch the project, it is run now without their assistance. Both projects, the Tengeru Cultural Tourism Programme coffee tour, and the KNCU's Kahawa Shamba Coffee Tour, still exist today, suggesting a level of sustainability that has carried on since the research was published in 2010.

Rwanda

In Rwanda, product development and diversification are mentioned as priorities in their Tourism Policy. Among several options, agrotourism is proposed as a way to augment the core market of ecotourism as an add-on product (Rwanda Ministry of Trade and Industry, 2009) to existing draws, like gorilla trekking.

Rwandan coffee stakeholders discussed difficulties in developing products related to coffee production to complement gorilla tourism, however, suggesting it is difficult to cater to a foreign tourist market that is only staying for a few days given the substantial time commitment required to arrive at and tour rural

locations. Similarly, the small farms are also considered a challenge, especially in comparison to Tanzania and Kenya, where medium-to-large privately-owned farms are more common (Anbalagan & Lovelock, 2014, 92). Rwanda has 355,000 smallholder farms with an average size of 0.1 ha, and 99% of coffee is exported (Sustain Coffee, 2019) Still, farmers indicated an openness to tourism while recognizing the difficulties that seasonality would bring, especially since leaving the harvest to tend to tourists, though convenient for tourists, would not fit with the farmers' production needs (Anbalagan & Lovelock, 2014, p. 82).

Kenya

In a call to create a diversified and enhanced tourism product toward 'Enhancing Resilience and Sustainable Tourism in Kenya,' the Kenya National Tourism Policy recommends a range of ecotourism and community-based tourism initiatives, like homestays and agrotourism products. As seen, coffee tourism and plantation visits would fall under this designation. But despite calls for developing infrastructure, developing these kinds of tourism products, and adopting international benchmarks (Republic of Kenya - Ministry of Tourism & Wildlife, 2020, 20), the impacts of coffee tourism have not been researched in the country.

Findings from international & regional coffee tourism

Through these international and regional examples, there are similarities in the framing of coffee tourism that show potential for development, as well as shared absences holding that development back.

More than anything, coffee tourism requires a sufficient tourism flow to generate meaningful revenue. What has not yet been proven in the literature is that these tourism flows are being generated by coffee tourism alone.

As far as coffee tourism's implementation, it is easier for tour operators to develop a coffee tourism product at coffee plantations rather than smallholder farms. This is because they are generally better located, they are larger, and they have more resources, like infrastructure, human capacity, and physical facilities to welcome tourists. For a high-end tourism niche like those international tourists who visit Uganda, these factors are critical, especially given the structured nature of their visits.

Coffee tourism's inclusive growth potential is unlikely to be realized unless those smallholder farmers are involved. The development of appropriate community-owned coffee tourism is possible through external intervention (e.g. through tour operators) but achieving it at scale or with notable financial viability will be difficult.

Adding onto those essential factors could be a supportive environment that has been seen to address the implementation of other agrotourism products. The following framework, based on five pillars, addresses developmental weaknesses that were found on the ground (Colton & Bissix, 2005, 3):

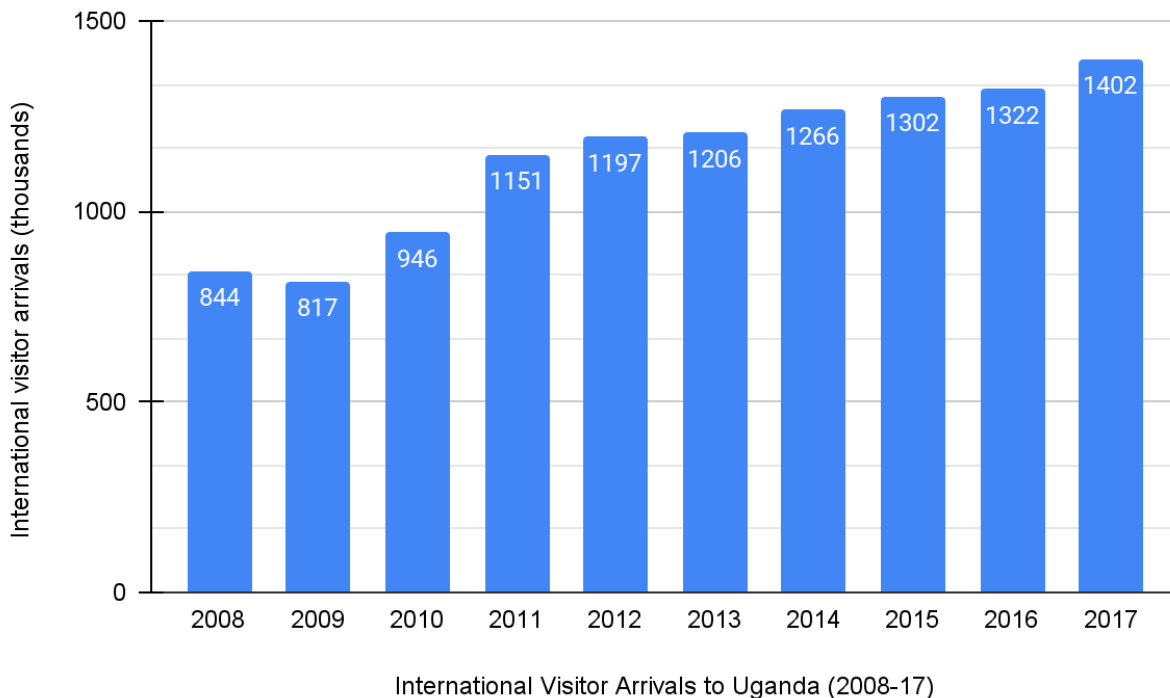
- **Government Support** - lack of support at local levels, signage, zoning, promoted in marketing campaigns, though the products first need to be developed
- **Partnership and Communication** - lack of awareness among farmers for potential value-added opportunities
- **Product Development** - the need for market-ready products, the definition of industry standards by provincial/national councils
- **Marketing** - lack of information regarding tourism markets and trends, greater awareness between product and market match, clarify the position of agrotourism relevant to other notable attractions
- **Education and Training** - lack of skills to diversify farming operations; lack of time to pursue it, requested resource guide

These five pillars can be seen combining in coffee tourism in Colombia to create sustained interest in a coffee region. The same five factors are seen missing in LuxDev's project in Nicaragua. With that, the conditions for the implementation of coffee tourism necessarily start with tourist flows and the willingness of mediators to connect tourists to a tourism product. This development can then be bolstered by - but is not predicated on - the assistance of a top-down approach involving the government.

2.2 Tourism flows in Uganda

As suggested by the international examples in Colombia, El Salvador, and Rwanda, coffee tourism stands a better chance of being a tool for inclusive development if it is implemented where tourists are already going, rather than working to develop completely new tourist flows. Starting with the current state of tourism can provide a baseline which could then inform further research on reducing the gap between interest in coffee tourism and action in realizing it.

Figure 2: International Visitor Arrivals to Uganda (2008-17)



Source: UBOS

For Uganda, 80% of international visitors in 2017 came from other countries in Africa. The highest numbers are its immediate neighbors: Rwanda (441,994), Kenya (334,788), and Tanzania (89,253). The most common countries of origin outside of Africa were the United States (61,775), India (35,676), the UK (33,564), China (16,842), and Canada (13,109).

Of those international visitors, about 126,000 are leisure visitors. This tenth of the national tourist flow is considered the target market for coffee tourism for several reasons. In 2019, leisure tourists spent US\$1,091 per person on trips of a median of 7 days. Though 80 percent of tourists in Uganda expressed interest in community tourism, only 10 percent incorporate community visits into their itineraries (World Bank, 2020, 44). With the attraction of mountain gorillas and other natural wonders, this group presents an underutilized source for community tourism, of which coffee tourism plays a part. The number of overall visitors to Uganda's national parks increased from 214,000 in 2013 to 325,000 in 2018 (Ministry of Tourism Wildlife and Antiquities, 2021). The two most popular national parks are Murchison Falls, which accounted for 32 percent of all park visitation, and Queen Elizabeth National Park (24 percent). The next

most visited park is Bwindi Impenetrable Forest (11 percent), which is also a UNESCO site for its richness in biodiversity, including the mountain gorilla, with UNESCO finding that “community benefits arising from the mountain gorilla and other ecotourism may be the only hope for the future conservation of this unique site” (UNESCO, n.d.).

2.3 Domestic tourism in Uganda

In light of COVID-19, countries around the world have put a renewed emphasis on domestic tourism to supplement the loss of international visitors, offering lower prices at attractions and accommodation, including Uganda where park admissions were lowered for domestic visitors (Uganda Wildlife Authority, 2020). Likewise, the Ugandan government is promoting digital campaigns called Take on the Pearl, or Tulambule Uganda, which recognize domestic tourism’s capability to aid in “job creation, poverty alleviation, education, environmental preservation, and cultural exchange” (Mutegeki, 2020, 1).

Could prioritizing domestic tourism promotion be a way to support coffee-growing communities? Concerning tourism overall, it is not reasonable to expect domestic tourism to offset international tourism, especially when big expenditures are involved (Mutegeki, 2020, 1). Though domestic tourism made up 30.9% of direct Travel & Tourism GDP in Uganda in 2017 (World Travel and Tourism Council, 2018, 6), their travel habits have different impacts, like the low incidence of using leisure tour-specific amenities like tour operator vehicles (just 1.5% use one) and lower average expenditures in accommodation establishments, which means difficulty supporting higher-end hotels and lodges. 89% of Ugandan domestic tourists travel for leisure, recreation, relaxation, and holiday, but those impacts are limited by their incomes (Nassuna, 2019, 28). A mean income of about US\$537 (Ahebwa & English, 2021) is lower than the average trip spend of an international tourist.

Another domestic issue is the very low rate of coffee consumption in Uganda. As a country, Ugandans drink about 4% of the coffee they produce (Ssekandi, 2020). Even with the increasing coffee production that is coming with the realization of the Coffee Roadmap, that weak interest in coffee does not forecast a strong interest in coffee tourism.

Looking beyond the impact of domestic coffee in countries with strong coffee cultures like Ethiopia, research done in other coffee-producing nations shows that local tourists get virtually the same amount of satisfaction out of coffee tours as their international counterparts (Smith et al., 2019, 226) (Wang et

al., 2019, 155). While the tiny domestic coffee culture in Uganda suggests this will not be a viable way forward in the short term, its continued development may pay dividends later on.

2.4 Challenges for coffee tourism

With the number of stakeholders involved in developing tourism - the private sector, academics, NGOs, and the government - there is a risk that products can be proposed as an ideal solution without considering actual issues facing that community (Ellis & Sheridan, 2014, 7). Researchers have often discussed coffee tourism as a potential development tool for local communities while seldom providing concrete evidence on its implementation and effects, preferring to focus on its broad socio-economic benefits to rural areas (Jolliffe, 2010; Karlsson & Karlsson, 2009; Lyon, 2013). Given that uncertainty, a degree of caution should be exercised in assuming any one set of conditions could provide a key to unlock a specific set of tourism, as the view and application of one ecotourism development model without an in-depth understanding of the local environment can contribute to the failure of ecotourism projects, as well as the lack of adequate planning for any proposed model (Wondirad, 2019, 1054).

Problems in the implementation of coffee tourism range from the lack of marketing resources and language barriers to an efficient way to access and communicate with international travel markets (Honduras Turismo & Marketing, n.d.), as well as overall issues include prioritizing limited resources (product development and improving service over sales and marketing), market intelligence (market research not easily accessible, special skills to analyze), niche tourism products (birding, for example, is more attractive internationally than domestically), and limited infrastructure (limiting the way and frequency in which coffee producers can respond to leads, follow up on sales inquiries, actively manage social media).

Discussions with coffee stakeholders in Thailand held around creating a coffee tourism network resulted in a list of coffee tourism products their region could support (Smith et al., 2019, 725), as well as the potential concerns involved:

- ❑ **Proposed activities:** visit coffee farms, nature trails, coffee and tea plantations, creative activities and learning about the coffee-making process, creative cooking competitions using coffee, homestay, quality of coffee process, rice terrace, local community training, tourism facilities development, tourism management committees for villages

- ❑ **Proposed problems:** waste, transportation, differences in culture and well-being, language and communication, congestion of tourists during holidays and festivals, competition issues in coffee marketing, accessibility, facilities in tourist attractions, incorrect tourist information, lack of coffee knowledge for the local community, natural resource deterioration
- ❑ **Potential causes:** pursuing tourists by trend without a plan for the destination, no organization directly responsible for tourism, lack of communication and knowledge, lack of payment from tour operators, too small guideposts, uneducated and inexpressive local community, lack of community collaboration, lack of tourists' consciousness, conflict of interest, weak community, lack of tourist attraction management

In addition to the activities and the cause-and-effect problems listed, stakeholders at different levels of the government were identified to assist in handling tourism, including district offices, culture offices, local communities, the police, and the Tourism Authority of Thailand. Beyond the suggestion of how multi-sectoral this kind of implementation would necessarily be, it also reveals that skilled interlocutors between tourists and coffee farmers or producers are essential to assist in coordination, implementation, and management.

The awareness of problems with coffee tourism connects more broadly with how farmers understand agrotourism differently than citizens, including its potential impacts on the ecological, economic, and social aspects of where they live. Even a hoped-for positive impact like a rise in revenues will face hurdles that include rising transportation fees, seasonality of employment, and changing social structures (Duursma, 2016, 61).

Government's involvement in facilitating coffee tourism

Sound governance is instrumental in implementing sustainable tourism in that it cultivates democratic and transparent processes (Wondirad, 2017, 5) while guiding the industry's direction (Bramwell & Lane, 2011, 419). But not all coffee-producing countries have sound governance.

Public sector evaluations show a range of scores for transparency and corruption for coffee-producing countries (Transparency International, 2020). Scales like the Corruptions Perceptions Index, which measures countries "by their perceived levels of public sector corruption, as determined by expert assessments and opinion surveys" has Costa Rica, Rwanda, and Colombia as ranking in the top 100 of 180

measured countries (42nd, 49th, and 92nd, respectively), while others like El Salvador (104th), Kenya (124th), and Uganda (142nd) are much lower on the rankings, signifying a higher perceived level of corruption.

Because coffee tourism exists in countries across a range of clean to corrupt governments, governance is not a prerequisite to tourists engaging with coffee experiences. Though this is not a limitation for coffee tourism's growth, it may be for its sustainable implementation.

Partnership and communication

Countries like Colombia suggest that a successful coffee sector is aided by a stable and consistent partnership among stakeholders, even if their national government is not without other flaws. There, the National Federation of Coffee Growers leads coffee policy formulation and implementation through the National Coffee Fund ("Fondo Nacional del Café") (FNC). With the stated goals of maximizing coffee producer income, meeting regulations, and encouraging efficient and sustainable farming, the fund has been renewed every 10 years by the Colombian government to manage the sector (Federación Nacional de Cafeteros de Colombia, n.d.). The taxes that are paid by producers to fund the FNC go toward public goods and benefits that include research and transfer technology, rural extension services, and promotion and advertising.

As the involvement of the community is a core part of planning and managing a sustainable destination, ensuring that participation is not just vital for residents to benefit from tourism's development, but critical for ecotourism's successful implementation (Wondirad, 2017, 4). That coordination is often seen through collectives and cooperatives.

Cooperatives are organizations designed to benefit the members through voluntary membership. Some may be designed around a single purpose (e.g. organizing coffee growers) while others can support multiple functions. As seen in coffee-producing countries around the world, there are instances of coffee tourism emerging through cooperatives (Karlsson & Karlsson, 2009). Does the collective management of cooperatives make them more likely to create a sustainable tourism product than tourism at the private estate level? That is, is this collaboration necessary when there are a majority of smallholder farms?

In some instances, yes. Cooperatives in Costa Rica are earning higher prices; marketing cooperatives in Kenya are better able to meet food safety standards to remain competitive in selling green beans; and Ethiopian coffee cooperatives are sharing socio-economic benefits (Mojo et al., 2017, 84-85). In a study in Nicaragua, a new tourism product relied on local cooperative unions - UCA San Ramón and CECOCAFEN - for tourist flows and training. UCA San Ramón represents 21 agricultural cooperatives in the area and its activities include micro-credits to the farmers, improvement of housing, toilets, roads and health, scholarships, social projects, and the promotion of community-based agrotourism (Höckert, 2011, 53). But after the replacement of an international coordinator with a local one, tourist flows were weakened, showing fragility in a system that relies too heavily on one person. Still, the support of cooperatives was not the only impetus for the development of coffee tourism in the region - there were also grants from the UNDP, a religious organization, and a French NGO - a finding the researcher calls “disempowering” because it decreases initiative from within the community.

In Guatemala, the process of implementing coffee tourism at the cooperative level had benefits including “a diversified managerial structure, extensive training opportunities, and new professional positions” (Lyon, 2013, 189) though that implementation was dependent on external support. For as long as that development is dependent on support from outside the community or the cooperatives, it is not sustainable. That sustainability also extends to the participants. Less than half of the project’s original trainees were still providing tours a year later, as inconsistent tourism flows resulted in a lack of stakeholder interest to continue with the project.

In the smallholder coffee farms in Tanzania, coffee tourism increased and stabilized income by diversifying the farmers’ offerings and contributing to community development through programs and new businesses. Those Tanzanian projects did need government support from the Tanzania Tourist Board and private investors (Karlsson & Karlsson, 2009, 38) to start, but were able to move past that to become self-sustaining.

Optimistically speaking, cooperatives could provide useful inputs, like organizing the interactions with tour operators or distributing revenues to farmers and the community. Expecting them to meaningfully affect tourism flows or manage products is less likely and should remain the domain of tourism operators who can deliver tourists, facilitate the tour, and provide advice on maintaining or upgrading service standards.

Product development through the private sector

It is not inevitable that a coffee-producing country should become a coffee tourism destination. The private sector is known to identify opportunities quickly, drive forward new product development initiatives and come up with effective strategies to benefit communities. With coffee tourism as an emerging product, the lead of the private sector may dictate the short-term development. While the interest of tour companies and tour operators is significant, it can be complicated as they may respond more to the potential of an opportunity rather than paying particular attention to the destination's social concerns (Simpson, 2008, 9).

This complication is seen at farms in Bali that are taking advantage of the rise in demand for specialty coffee. Called civet coffee, the process involves the coffee cherry being first eaten and partially digested by a civet, a small mammal native to Asia and Africa, then roasted. While these plantations are being used as tourist attractions in Bali, the poor treatment of these animals raises welfare concerns (Carder et al., 2016, p. 201). The popularity of the offer, followed by the negative reaction, suggests the difficulty that exists for farms and farmers in navigating the demands and beliefs of international tourists.

In Thailand, stakeholders show their enthusiasm for coffee tourism's potential by supporting the launching of a coffee tour program, community-based tourism, and training activities to support a coffee trail and network in Northern Thailand (Smith et al., 2019, p. 724). Indonesian tour operators have shown a willingness to capitalize on tourist interest in Toraja coffee and the "death ritual" it accompanies, with 88.9% of tourists surveyed expecting to participate in "drinking coffee at death ritual ceremony" - more than the 74.3% who wanted to "[take] coffee with the farmers" or "[live] with coffee farmers in estates" (Muhammad et al., 2020, 189). This suggests an interest in coffee tourism and culture in Southeast Asia, and that the coffee product can be incorporated into aspects of cultural tourism. The concern for Uganda, however, would be in believing that creating a coffee tourism product is enough. Given the dissimilarity in its tourist flows versus the much larger international ones in Thailand and Indonesia and the lack of a strong Ugandan coffee culture, there is a significant gap to overcome.

Expanding on the types of individual coffee tourism products that can be offered to tourists, this framework categorizes private coffee estates (Wang et al., 2019, 151) to show their stage in tourism development.

- ❑ **Traditional** - focused on the plantation; may provide tours but no design of specific experiential activities
- ❑ **Educational** - in addition to growing coffee, provide tours, offer classes, coffee samples
- ❑ **Comprehensive** - coffee plantation, coffee-related activities, meals, and accommodation

This development of coffee tourism functions as an extension of coffee estates that were established to produce coffee beans and developed without the intervention of outside organizations or the government. That is, travel agencies and guides were not involved.

In this environment, coffee tourism functions to market and brand the estate. Smallholder coffee farmers would not have access to the same type of resources, suggesting again the need for an interlocutor like a tour operator, guide, or supportive network to ensure that that smallholder sector does not get bypassed.

The host of the coffee tourism experience has an impact on both the tourism product's implementation and the outcome. When tour companies - or even international brokers - are more motivated to implement the experience than the community is to receive it, or without fully engaging the local communities, projects have difficulty reaching sustainability. As noted in the development experience in Nicaragua, the costs of this shortcoming can be both financial and cultural (LuxDev, 2017).

2.5 The impact of coffee quality on earnings

The interest in coffee tourism is predicated on its ability to deliver an increase in revenues. In order, then, to understand its potential for impact, it is valuable to understand how other variables affect coffee production revenues.

What farmers can expect to earn on the market, as well as the amount of coffee they can hope to sell, depends on the size of their farm, the type of bean, and the farming techniques employed. By seeing the range of possible revenues for average smallholder farmers, a baseline can be established that potential revenues from tourism can be measured against.

A report funded by the Global Coffee Platform (Mugoya & Global Coffee Platform, 2018) categorized Ugandan coffee farmers in the following ways:

1. **Subsistence/traditional** - Farmers use basic agronomic practices and employ family labor without following recommended GAPs (Good Agricultural Practices)
2. **Improved** - Farmers use less than the recommended amount of fertilizer and/or manure, but do follow a significant amount of recommended GAPs
3. **Recommended** - Farmers adopt most GAPs and utilize canopy/pest/disease management to optimize production
4. **Commercial coffee plantation** - At 50 acres or more, coffee on estates grown as monocrop and uses specialized management

These GAPs include pruning, fertilizer application, pests, and disease management. This difference in yields is substantial between Traditional and Recommended, as it can increase the gross margin four-fold for robusta and three-fold for arabica. Their application does require additional investments of time and money, investments that smallholder farms may either be unwilling or unable to make. Without that investment, crop yields suffer.

Coffee in Uganda is primarily grown intercropped with 85% of coffee farmers growing other produce and livestock, including bananas and cows. For the average farmer, their net profit from coffee, after costs and outlays, is US\$190/year, while the net profit from their other goods is about US\$175/year (Fobelets et al., 2017, 41). Coffee, then, is a cash crop grown for the international export market and it makes up just a portion of the total livelihood of Ugandan farmers. Their income comes from other areas of the farm, which acts as a bolster against the volatility of the coffee market.

As such, and given the size of the farms and factors affecting yield that may be beyond a farmer's control, like the slope of the hill and the soil quality (Novotny, 2014, 27), improving coffee quality alone is unlikely to have a significant impact upon the livelihood of an average coffee farming household.

When taking into account the expected incomes laid out in Table 4, at 0.18 hectares (0.44 acres) of Recommended farming of arabica beans, a gross margin of US\$407 is generated. That improvement from US\$143 for Traditional farming is enough to get one person in a household over the absolute poverty threshold of one dollar a day but falls short of the PPP-adjusted poverty line for Uganda of US\$2,077/year/household. Improving GAP can raise revenues, but on average coffee farms, it is not significant enough to get coffee farming households out of poverty.

Table 4 - Expected Incomes For Acres of Arabica and Robusta in Uganda (US\$1 = 3,750 UGX)

		Gross Income (in USD/per acre)	Gross Margin (in USD/per acre)	Gross Margin (in %)
Robusta	Traditional	293	260	88%
	Improved	680	497	73%
	Recommended	1,211	845	70%
Arabica	Traditional	345	325	94%
	Improved	908	647	71%
	Recommended	1,610	925	57%

Source: Mugoya & Global Coffee Platform, 2018

For those farmers with small lots, the recommendation is to consider complementary farming systems of coffee and other enterprises. Potential paths forward could be increasing the area cropped with coffee, though that may mean growing less food. Another path would be developing an additional livelihood option, like coffee tourism. Is there an expected income or farm size that would receive the most benefits from tourism enterprises?

The structure of the tourism value chain

Coffee tourism requires interlocutors to assist coffee producers in gaining access to the tourism value chain, as well as their willingness to share benefits with coffee producers. At that point, the impact of tourism and the resources required to implement it could be weighed against the time and resources necessary for improving the quality and yield of the farm to suggest its viability as a potential revenue stream.

When considering how tourism earnings might reach these coffee producers, it is worth seeing how tourism is structured in Uganda to see where overlaps between the coffee-producing value chain and the tourism sector's value chain can show potential areas for the implementation of tourism products, as well as the necessary stakeholders.

The tourism value chain is led in terms of policy, strategy, and planning by the Ministry of Tourism, Wildlife, and Antiquities, while the UWA and UTB manage natural development and product development and marketing, respectively. The tourism value chain on the ground (CBI Ministry of Foreign Affairs, 2020) includes:

- **Local transport** - internal airlines, bus services, car hire companies, taxi drivers, inbound tour operators, drivers, guides

- **Provision of accommodation & food** - accommodation providers: hotels, lodges, guest houses, campsites, community-based homestays, restaurants, hosts
- **Attractions & activities** - owners of natural and cultural products, attractions, activity facilities, inbound tour operators

While the coffee value chain can be thought of as having the following steps (Mwesigye et al., 2020, 23):

- **Production/Farm Level** - coffee grown on small plots with limited use of yield-enhancing inputs
- **Aggregation** - the collection of coffee, loading, transportation
- **Primary processing** - hulling and washing of coffee
- **Secondary and tertiary processing** - grading plants and roasters
- **Retail/Consumption** - export, markets, hotels & restaurants

While the majority of the general tourist interest might fall in visiting the farms or experiencing coffee at retail points, further research will reveal if there are other touchpoints along the two value chains that might be beneficial.

2.6 The questions this research will answer

Uganda is a country with an active and developing coffee sector, a tourism sector that lags behind its regional competitors with a small but high-value ecotourism niche, a supportive but inefficient government, poor physical infrastructure, and coffee producers that are predominantly smallholders with very low incomes, human capital, and little experience with coffee tourism.

So, can those elements combine to create a coffee tourism sector? If so, what would the expected outcomes be along these kinds of routes? And is there a possibility for coffee tourism developing routes beyond the already-trafficked routes established in Uganda?

Then, are current and potential coffee tourism product actors supportive or capable of developing this product? To that end, what, if any, support do these actors need to develop a successful coffee tourism product? If they were successful in this goal, what is the potential for coffee tourism to generate inclusive growth in Uganda? In more specific terms, what would be the likely impact of a successful coffee tourism product on the Ugandan tourism sector in terms of visitor numbers, length of stay, and expenditure? And

finally, what could a plan to accomplish that look like in terms of a program to develop coffee tourism in Uganda?

By filling in the gaps in the existing literature and studies about coffee tourism in Uganda, this research will begin answering these questions.

3. Methodology, Data Collection & Analysis

3.1 Research Methods

This study was conducted using a modified version of the value chain approach to gain more of an understanding of the linkages between tourism and coffee production. Qualitative research was conducted in the form of remote in-depth interviews and analysis of local data.

Qualitative data, which in this instance takes the form of words (spoken and written) (Denscombe, 2010, 273), was gathered through interviews. The goal of assessing how coffee tourism is understood by having the stakeholders present in Uganda answer questions about experiences, feelings, and perspectives following the use of semi-structured interviews around focused topics or with key informants for background information (Hammarberg et al., 2016, 499) as well as incorporating the analysis of documents like reports, websites, or personal data. Both the semi-structured interviews and the analysis of documents have been incorporated into this report.

Where qualitative and quantitative research differ is the latter's use of systematic data collection and statistical analysis. Still, the same rigor and quality can be brought to the organization and collection of numerical data as is brought to the processes involved in collecting qualitative data (Denscombe, 2010, 295), even when the data is not as structured or concise. What changes, however, are the methods and criteria. Whereas internal validity, generalizability, reliability, and objectivity are suitable criteria for quantitative research (Korstjens & Moser, 2017, 121), the objective for qualitative analysis is trustworthiness, which can be measured with the following criteria: credibility, transferability, dependability, and confirmability. In other words, they ask: Can these findings be trusted? The following table presents the suggested criterion with strategies that can help to ensure trustworthiness in qualitative research, as well as the steps taken in this study to comply.

Table 5 - Strategies to Ensure Trustworthiness in the Research

Criterion	Strategy & Definition	Study
Credibility	1. Prolonged Engagement - Lasting presence during interviews, sufficient time to build trust, test for misinformation 2. Persistent Observation - Identifying characteristics and elements relevant to the problem under study 3. Triangulation - Using multiple methods of data collection 4. Member Check - Feeding back data, analytical categories, interpretations, and conclusions to the member group	1. Interviews lasted between 17 and 80 minutes, and communication has been ongoing since 2. Read and re-read transcripts, organizing concepts and core categories until final categorization and theory revealed coherent findings 3. Interviewed stakeholders in the same industry at several locations across the country, referenced interviews with data points, and supported with desk research 4. Data has been shared with willing and available stakeholders to confirm quotes and takeaways
Transferability	Thick Description - Describing not just behavior and experiences but context, so they are meaningful to an outsider	Described surrounding coffee tourism phenomena, as well as in other regions, to help findings become more transferable to other settings
Dependability & Confirmability	Audit Trail - Describing research steps taken from start of research through development to reporting of findings	Took notes from the beginning of research and first interviews, consultations, and emergence of findings. Additionally, audio interviews were transcribed and annotated.

(Korstjens & Moser, 2017, 121)

This research intends to provide a multifaceted view of the impacts for coffee tourism as a potential tool for inclusive development, which requires a hybrid approach of analyzing the available data and understanding stakeholder positioning. Qualitative research also allowed for connections with the research subjects, which bore additional data that serves as the basis for some of the key analyses, as well as a way of connecting perspectives along the entirety of the coffee value chain and the tourism value chain.

Starting from a grounded theory approach

As there is little concrete research about the successful implementation of coffee tourism in the various case studies mentioned, a grounded theory approach is a pragmatic way to first see what data exists and then develop a theory from there, with a focus on fieldwork. With this model, the research develops as it is performed (Denscombe, 2010, 108) focusing first on the investigation, or what Denscombe describes

as “the researcher [embarking] on a voyage of discovery.” As will be further explained in Section 3.3, the study was limited by the COVID-19 pandemic and a short research window, necessitating a change from in-person fieldwork to remote interviews, which though they may have been guided by the same spirit, were likely less effective than true fieldwork.

Overall, this method is emphasized to be practical over abstract, suggesting that the theory can only be fully judged by its efficacy in addressing real-world needs. The theory should be as useful to the people whose action it explains as it is to the social scientists and researchers talking about it.

The advantages of a grounded theory approach include its suitability to small-scale research, including for lone researchers with a limited budget, as was the case for this study. It is adaptable to various qualitative data collection methods (including interviews and documents), it is well-suited to exploratory research, and it provides theories and explanations. This open-minded approach is informed and aware of previous theories.

Guided by the value chain approach

In particular, this study has its roots in the value chain approach, using it to determine what sort of economic impact coffee tourism may have begins by considering the linkages between tourism and low-income people. In this instance, existing tourism flows were considered, including where the addition of coffee tourism could be seen to have benefits. Theoretically, tourism would directly benefit the farmers who are visited by tourists and guides. But the indirect beneficiaries might include the workers at the hotels where tourists stay when going on these visits, or the farmers who supply food to nearby restaurants, or induced benefits like agencies hiring more local support staff to handle increasing demand.

A value chain as a framework can suggest the steps necessary in the process of delivering a product like coffee or tourism. In this case, it helps to understand how low-income people can engage more beneficially in tourism by identifying obstacles or blockages preventing successful implementation. It can also provide strategies for overcoming said challenges.

For long-term prospects, coffee tourism solutions would ideally be scalable by connecting multiple sectors of stakeholders and would be accepted and embraced by private stakeholders because of the proof of

their functioning, thereby providing a path forward for policy and restructuring of the sector (Mitchell, 2021, 207).

As part of the step-to-step approach to pro-poor value chain analysis (Mitchell, 2021, 208), there are three phases: Diagnosis, Identify and appraise opportunities, and programming.

1. **Phase 1** - Mapping the value chain or the economy, and how low-income people do (or do not) participate. It also seeks to understand policy and regulation within the tourism market. This approach begins with the tourism economy, finding where the target group is currently operating and where that participation could be improved upon, instead of selecting a target community and working to develop tourism products there, irrespective of the tourism flows in the area.
2. **Phase 2** - Identify opportunities, create a long list of possible interventions, then organize them by the likely impact they would have intervening on poverty.
3. **Phase 3** - Present proposals as projects to be assessed by financiers, including budgets, indicators for monitoring, and other reporting tools.

Due to limitations on the research's time and accessibility to the destination, this study was constrained to Phase 1 of the Value Chain Approach.

3.2 Data Collection

In addition, relevant data and statistics were sourced from several stakeholders. This was used in combination with official statistics from Uganda, as well as other international tourism-related entities, to create models and projections about the potential impacts of coffee tourism for coffee farmers of a certain size.

3.3 Limitations

The research for this paper took place between March and August of 2021, and as such, was heavily impacted by the COVID-19 pandemic. The potential to travel and perform in-person interviews was first limited from the researcher's side as vaccines were unavailable, and then on the Ugandan side, as new waves of COVID-19 forced several countrywide lockdowns, including bans on inter-district traveling except for tourism. Out of concern for the safety of stakeholders and the ethical implications of traveling to

collect data during this sensitive period, interviews were conducted remotely through video calls on Zoom and Whatsapp. Several potential interview subjects cited the challenges of their environment during the lockdown, the difficulties in adjusting to new business logistics, and the loss of loved ones, as reasons for shortened interviews, or the inability to participate. The immediacy of the pandemic, as well as the prolonged effects of more than 14 months of pandemic-related complications, could have impacts on the subjective portions of the interviews.

Those interviews were conducted through email or by phone from contacts found through publicly available information on official Ugandan government websites, tourism-related Facebook pages and websites, or through associations. Additional subjects were introduced as a result of this first round of interviews, as each interviewee was presented with the opportunity to share contacts helpful in the research of the topic. Though this approach presents clear limitations in terms of access, the process was continued until there was representation along the coffee and tourism value chains.

3.4 Interview Structure

As described in the research methods, the interviews for this study followed a semi-structured approach. This standardized, open-ended interview format allowed for a baseline starting point to begin discussions with stakeholders across a range of positions in the two industries.

Interviews were structured to feature questions that elicited responses about behaviors, opinions & values, feelings, knowledge & data, sensory, and background & demographics (McNamara, 2006). Before each interview, the context of the research and the purpose for the interview were explained, the confidentiality of the content was confirmed, permission to record the interview for note-taking purposes was requested, and the indication of the expected amount of time was shared. After the interview was conducted, time was given for any other questions or experiences to be shared and a reminder of contact information for additional comments later on, as well as for the eventual sharing of the completed research.

An example interview is shared in Appendix 1.

3.5 Data Analysis

After each interview, keywords, themes, and trends were noted, as well as areas for follow-up, both with the interviewee (requests for data, other coffee or tourism stakeholders) and for the research. Transcriptions of these interviews were created through software called Fireflies.AI, the review of which allowed for the additional analysis of keywords.

In total, 31 stakeholders were interviewed during 29 interviews between May through July of 2021. Video interviews occurred using the communication mediums of Zoom, Google Hangout, and Whatsapp. Audio interviews were conducted using Whatsapp calls.

Additionally, four stakeholders shared data on their coffee tourism projects. Analysis, projections, and modeling were performed through Google Sheets.

4. Findings

The aim of the interviews conducted for this research was to understand coffee tourism’s potential for inclusive development in Uganda. As such, stakeholders from across the coffee value chain and the tourism value chain were interviewed about their experiences with coffee tourism, the obstacles they see it facing, and its potential to impact their lives. Participants from each value chain are represented in this study.

Table 6 - Interviewee Profile Table

Code	Interview Medium	Coffee or Tourism	Role	Duration of Interview (in minutes)
01	Whatsapp	Tourism	Tour Operator	47
02	Zoom	Coffee	Civil Servant	23
03	Zoom	Coffee	Coffee Business	28
04	Whatsapp	Coffee	Farmer	31
05	Zoom	Tourism	Tour Operator	29
06	Zoom	Coffee	Coffee Business	30
07	Whatsapp	Coffee	Civil Servant	25
08	Whatsapp	Coffee	Farmer	80

09	Whatsapp	Coffee	Farmer	40
10	Whatsapp	Tourism	Guide	23
11	Zoom	Coffee	Coffee Processor	48
12	Zoom	Coffee	Farmer	21
13	Zoom	Tourism	Tour Operators (2)	32
14	Whatsapp	Tourism	Association	58
15	Zoom	Tourism	Civil Servants (2)	40
16	Zoom	Coffee	Private Consultant	22
17	Whatsapp	Tourism	Coffee Business	26
18	Whatsapp	Coffee	Guide/Coffee Business	43
19	Whatsapp	Tourism	Guide	33
20	Whatsapp	Tourism	Accommodation	46
21	Whatsapp	Coffee	Coffee Business	42
22	Zoom	Tourism	Tour Operator	27
23	Whatsapp	Coffee	Farmer	27
24	Whatsapp	Tourism	Accommodation	24
25	Whatsapp	Tourism	Accommodation	17
26	Whatsapp	Coffee	Coffee Business	23
27	Whatsapp	Coffee	Cooperative	26
28	Email Interview	Coffee	Coffee Business	-
29	Whatsapp Audio	Tourism	Accommodation	-

Due to connectivity problems in the destination, the final two interviews were conducted asynchronously.

4.1 The preconditions for successful coffee tourism

The literature review revealed two major categories of preconditions for successful coffee tourism. One is adequate tourist flows, without which, the second, the coffee tourism environment, is meaningless.

These tourist flows should motivate tour operators to channel them to smallholder farms, where the farmers receive reasonable rates. In turn, they offer a quality offering that meets tourist needs. With that understanding, the following analysis of Uganda's current coffee tourism environment, including its

tourist flows, its government support, partnership & communication, education & training, and product development, to argue whether Uganda has the preconditions necessary for the successful implementation of coffee tourism.

Tourist flows

The three most-visited parks are all on the Western side of the country and each is an arabica-growing coffee region. That suggests at least 67% of all park visits - with the acknowledgment that tourists are likely visiting more than one park per stay - are in coffee-growing areas. But how well can coffee tourism tap into these tourist flows?

Bwindi Impenetrable National Park and Mgahinga Gorilla National Park, the two parks where the mountain gorillas inhabit, combined for just over 51,000 visitors in 2018/2019. Of those 51,000 visitors, an estimated 20,000 visitors went for gorilla trekking. Due to the Tourism Revenue Sharing (TRS) policy instituted at the park, a policy that is intended to share benefits from tourism with the local communities, each visit should be having an impact already. Research has shown mixed results that more often skew negative because of the challenges in identifying just which communities should receive the benefits, how much, and how transparent the disbursement is (Ahebwa et al., 2011, 390-391) (Tumusiime & Vedeld, 2012, 25) which also pushes the development of individual projects.

Figure 3: Arabica Coffee Growing Districts

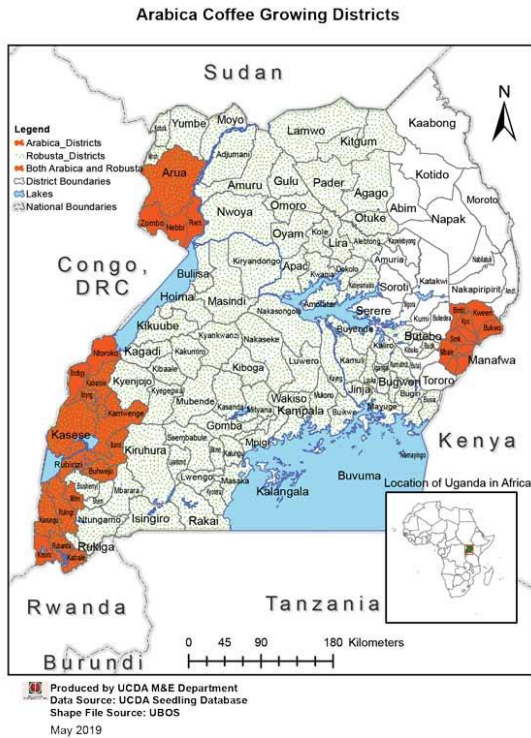
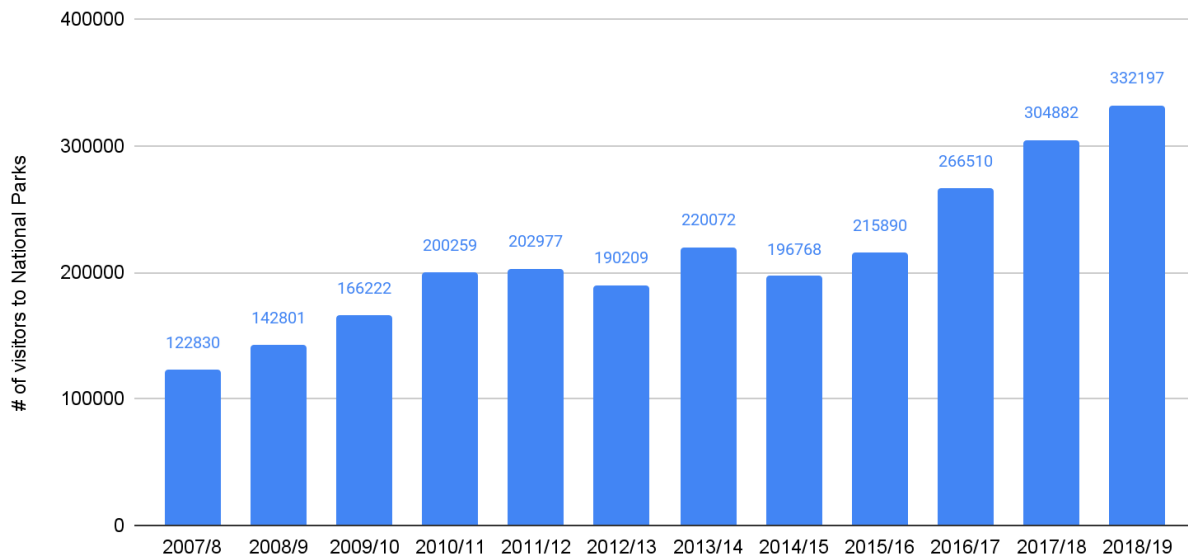


Figure 4: National Parks in Uganda



A recent study involving 14 ecotourism projects in Bwindi found little evidence to support the idea that those participating in the projects benefited significantly more than locals not involved in the project. Though they documented results that were “life-changing for some participants” and found improvements with a diversified product base that might reduce the risk of market failure, the sources for economic empowerment were touted as “indirect tourism-related economic activities that are supplementary to day-to-day livelihood activities” (Twinamatsiko, et al., 2019, 25). Though these projects report higher sales and increased visitor numbers from the year before the intervention to the year after, the long-term sustainability will become clearer after time. This, too, calls into question the likelihood of success of coffee tourism.

Figure 5: Number of Visitors to National Parks, 2007-2018



Source: Uganda Wildlife Authority

One other area of note for product development could be on the Eastern side of the country in the Sipi Falls/Kapchorwa/Mt. Elgon region, which received the highest coffee quality score of submitted Ugandan coffees. The National Park in the area, Mt. Elgon, however, receives the lowest number of visitors of Ugandan Parks and has shown declining visitor attendance since a high of 4,051 visitors in 2016/2017. This is an imperfect measure of total visitor flows to the region but tapping into an inconsistent flow of tourists at an average of 11 a day is unlikely, so the focus would be better shifted to Western Uganda.

Overall, the existence of tourist flows to the National Parks near where coffee grows suggests Uganda meets this pre-condition.

Government support

With its release in 2014, the Uganda Tourism Master Plan recognized the potential for tourism to create economic linkages between tourism and agriculture by “facilitating visits to local communities through village walks and visits to farm plantations (tea, coffee, banana, vanilla, etc.)” (Uganda Tourism Development Master Plan). Since that plan’s release, though, the results for creating those economic linkages have been mixed.

One analysis shows some positive steps for the coffee sector in annual coffee shows, better quality

training materials, and a positive reputation amongst other Ugandan sectors. There are challenges, too, like accountability, securing funding, and reaching farmers. The logistical difficulty of the latter is detailed as follows: Of the 91 Uganda Coffee Development Authority (UCDA)-defined coffee-growing districts, there are 10 sub-counties per district with up to 10 parishes per sub-county, and each parish incorporates 10 villages for the potential of up to 1,000 villages per district. The report concludes that with the three extension workers per district, “Uganda’s extension services cannot begin to reach all of Uganda’s farmers” (National Coffee Platforms, 2016. 38).

In Uganda, the coffee market was liberalized in 1991 after the repeal of the 1969 Coffee Marketing Act, which had created a monopoly on coffee exports through the Coffee Marketing Board. A resulting liberalization found the cooperative sector with difficulties providing farmers with supplies, ultimately leading to increased involvement from the private sector. At the same time in 1991, the UCDA was created to promote and oversee the coffee industry. To foster involvement with stakeholders and to increase sustainable coffee production, the Uganda Coffee Platform (UCP) was formed in 2006. It is a voluntary organization featuring a public-private partnership (National Coffee Platforms, 2016).

There are several government institutions and plans that touch coffee tourism tangentially, but the lack of resources dedicated to managing coffee and the little action taken since 2014 suggests relying on government support will be difficult.

Partnership & Communication

As seen in other countries, coffee cooperatives in Uganda can be an economic organization that provides smallholder farmers a way to address socio-economic issues and defend their interests. In the coffee value chain, cooperatives play a role in processing and marketing agricultural products while also contributing to poverty reduction, providing employment, reducing financial leakages, and other benefits (Nannyonjo & UNRISD, 2013, 4). In Uganda, the entity responsible for lobbying the government, stakeholder advocacy, and resource mobilization is the Uganda Co-operative Alliance Ltd. Other responsibilities include capacity building, advisory services, and developing networks and partners in support of cooperatives (UCCFS, 2015).

The tripartite cooperative model in fighting poverty aligns these three components (SACCO, RPO, and ACE) for a system that uses bulking in the procurement of inputs like seeds, farmer training, and includes

both men and women. This support and development can lead to expanded access to markets, meaning greater demand for the farm off-take, and therefore, more attractive farm-gate prices.

As seen in the literature review, cooperative support is of secondary importance to coffee tourism's implementation. Still, not only are cooperatives seen in large numbers, but coffee tourism is currently being implemented by several, so this type of precondition is met.

Education & Training

In Uganda, tourism training is offered by the Uganda Hotel and Tourism Training Institute, promoted by the Uganda Tourism Association, and affiliated with conservation-related training through the Uganda Wildlife Research and Training Institute.

Coffee production training is offered by the National Union of Coffee Agribusinesses and Farm Enterprises (NUCAFE), the Ugandan Coffee Development Authority, Uganda Coffee Agronomy Training, and the Ministry of Agriculture, Animal Industry, and Fisheries, as well as private stakeholders like The Coffee Gardens, Great Lakes Coffee, and VQS Coffee Academy and Barista School.

There is a spread of offerings between coffee production development, tourism training opportunities, and the hybrid of agrotourism by the relevant associations and institutions. Without tourism demand, though, there is little chance of coffee tourism-specific training taking hold, no matter how well-trained stakeholders may be.

Product Development

Recent support by the Uganda Tourism Board of agribusiness enterprises (Uganda Tourism Board, 2020) and their embrace of the Agro-Tourism Association (ATA), in particular, (Batte, 2021) show an interest in developing agrotourism products.

The ATA offers training and workshops around their own agrotourism model which includes sharing insights on developing the three kinds of offerings:

1. **Have something for Agro-Tourists to see:** farm tours, historical recreations, processing demonstrations, crop art, and crop landscaping, natural features, petting zoos

2. **Have something for Agro-Tourists to do:** educational activities, pick-ups (pick U own), petting zoos, BBQ
3. **Have something for Agro-Tourists to buy:** food and beverages, gifts and souvenirs, fresh and processed food and drinks

This framework and the development by stakeholders in the coffee-growing countries in Uganda of coffee tourism suggests a willingness between coffee farmers and tourism operators, at least on the local level, to continue pursuing its development.

4.2 The capabilities and interest to develop coffee tourism

To assess the actors' readiness, interest, and capabilities to develop coffee tourism, the stakeholder interviews were organized, analyzed, and grouped by categories.

Stakeholders from each value chain were open to coffee tourism and believed that much could be done to continue developing the product, but they are beset by obstacles from many sources that affect the continued development of coffee tourism. Below is a summary of the obstacles mentioned by public and private stakeholders in both industries.

Stakeholder Comments on Tourism Flows & Marketing

Type of Obstacle	Summary of Comments
Low tourism awareness	While stakeholders on the ground found tourists very pleased with their coffee tourism experiences, tour companies are rarely being requested to offer this kind of trip by arriving tourists
Marketing/promotion	Similarly, some operators felt that 98% of promotion comes from tour operators and local governments promoting to let people know about the coffee tour
Low domestic consumption	Tourism and coffee stakeholders saw the reality of only 4% domestic consumption as low domestic interest
Pre-planned itineraries	As seen above, guides and accommodations agreed that 80% of tourists come with their itinerary planned without time or space to add activity

Though constraints in this research limited interaction with tourists on the ground, stakeholders reported that tourists generally enjoyed the product. Still, it is an experience tourists largely find out about during the trip, not one that is marketed or promoted on a national level or before trips are planned, highlighting again the need to have these tours pre-booked into itineraries for more significant impacts.

Through the coffee and tourism value chains, there is a shared interest in developing coffee tourism. That actual development is happening slowly, impeded at each level by obstacles in infrastructure and promotion that have endured for years, calling into question the capacity to realize this product on a national scale.

Other constraints can be seen on the tourism promotion side. The process for tour operators to bring an idea to market can take up to two years, given that it takes time before a product begins to sell from an international wholesale tour operator if it does indeed sell (Destination British Columbia, 2019). That requires open communication between the coffee farmers and those delivering the tourists to ensure clear expectations.

Stakeholder Comments on Government Support

Type of Obstacle	Summary of Comments
Policymaker awareness	Private stakeholders comment about lacking the policy support, materials, funding, and research necessary to further develop the coffee tourism segment, that they have not seen specific interventions, and they need a policy that drives the agrotourism sector

Recent actions by the Uganda Tourism Board include supporting the launch of a coffee house and signing an MOU with the Uganda Coffee Development Authority for coffee tourism promotion. Among their planned outputs for 2020/2021, which has been delayed, were supporting flagship tourism development products including agrotourism, coffee tourism, and homestays, as well as creating guidelines for agrotourism (Uganda Tourism Board & Uganda Tourism, Trade, and Industry, 2017). The UTB and UCDA were also involved in 2018’s Coffee and Tourism Symposium, though plans for a follow-up fell apart due to lack of funding.

Stakeholder Comments on Partnership & Communication

Type of Obstacle	Summary of Comments
Tour operator awareness	Disagreements were seen between local tour operators and national operators, suggesting that national ones come up with their own itineraries without visiting local destinations, that they don't see the connection between coffee and tourism, and that tourists are not given enough time in the destination
Guide awareness	Similar to the above, the national tourist guides or safari guides are not aware that coffee is important to the local communities

A finding by IED suggests, “Most visitors are on pre-planned, and therefore time-poor, itineraries. Little to no effort, at UTB or local tour operator level, has been made to define ‘new’ products and have this offered to international tour operators to include in the pre-planned itineraries. (Twinamatsiko, et al., 2019, 9)”. This disagreement and lack of communication between partners at the national level, both public and private, and stakeholders on the ground is a significant factor.

Stakeholder Comments on Education & Training

Type of Obstacle	Summary of Comments
Training and resources	<p>Throughout the value chain, stakeholders found a lack of capacity, suggesting it is hard to find farmers, more training on packaging products is needed, product development is lacking, and industry knowledge is weak, including information for particular coffees, as well as its history, timing, and process</p> <p>This lack of knowledge and resources is magnified by a distinction in tourists noted by stakeholders. Given that some are coming not just for pleasure, but for business, they want to know about market trends, export procedures, setting up businesses, and pests</p> <p>Different training timelines were elaborated, from four to seven days for those with tourism experience to four weeks with only farming experience.</p>
Plantation maintenance	Beyond tourism-specific training, stakeholders mentioned a lack of general coffee plantation maintenance, highlighting the importance of pruning, gardening, and keeping the plants free of pests and diseases
Producer awareness	Tourism stakeholders specifically shared the general sense that coffee is not seen as important as tourism

Narrative	Several tourism stakeholders commented on the need for farmers to have a good story, to know why they started coffee farming and how, their hopes for its growth, the view of their family to make selling the package easier
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The suggested training windows do not take into account other potential needs, like command of English or another foreign language to host tours or knowledge of market trends. The expectation, then, should be less on the capacities of farmers to host the tour and more on the interest of interlocutors to facilitate the tour, in the way that park guides with language skills and a familiarity with coffee could potentially provide.

For the tours that do happen, coffee producers perceive their daily interactions with tourists and the satisfaction after the tour as proof that more tourists would also enjoy the tours, but so far that has not been realized. Ultimately, there is a gap between tour operators and coffee producers regarding the potential of coffee tourism, in that coffee producers would very much like for it to succeed for their own livelihoods and tour operators do not see a demand for it coming from tourists.

Stakeholder Comments on Product Development

Type of Obstacle	Summary of Comments
Infrastructure	Many coffee and tourism stakeholders found infrastructure to be a challenge, with access to farms being jeopardized by flooding roads, reducing the reliability of a given tourism product. Even without flooding, the roads were described as dusty, bad, and full of potholes. Tourism products need to be near a lodge to facilitate access for short trips. General coffee infrastructure was also lacking, as most could not do processing, roasting, or tasting
Security	Stakeholders found certain elements necessary for a coffee farm to be a valid product, including protocols like security, hygiene, running water, electricity
Crop quality	Though there was not universal agreement about the need for organic coffee, most found the practices tended toward organic and those producers should prioritize this
Shelter	Coffee and tourism stakeholders cited the need for capital to improve facilities for tourist comfort, helping to shelter if it is too hot or raining
Lack of worthwhile	Several tourism stakeholders found difficulty justifying long trips to coffee

activities	plantations not on routes for the lack of activities, saying they need interesting, educative, motivating activities, like learning how to harvest
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As interviews with stakeholders reveal, tourism operators require a certain level of crop quality (in several instances, organic) as well as a certain level of infrastructure (e.g., clean toilets) at the farm for additional smallholder farmers to begin participating in coffee tourism.

The coffee that is grown where tourism flows is generally arabica and given that it grows at higher altitudes than robusta, access and infrastructure are problems that need to be addressed. In a recent year, only half of the required budget for maintenance needs was provided, while a survey showed half of Ugandans believe their roads deteriorate within 1-2 years of construction, with 74% saying the impact on economic development ranges from moderate to very high (Muhwezi et al., 2021, 11). Responsibility for these obstacles falls on both private and public stakeholders, and a better commitment from both would be needed to rectify this situation.

Investments vary with the type of coffee tourism product. This starts at between US\$50-US\$300 for setting up basic equipment or updating a home to make a visit more amenable to tourists. For a more advanced installation, including a demonstration center with drying racks and pulpers that could have the potential to attract professional coffee traders, stakeholders could expect to pay over US\$1,000 (budget shown in Appendix 2). As established projects in farms show, returns for an established year can be up to US\$1,000. Is it worth spending a year's revenue on the infrastructure to attract coffee specialists for a day's visit? There remains the possibility that this could lead to further impacts, like contracts for exporting. More research is needed to understand how realistic that could be.

4.3 If successful, could coffee tourism generate inclusive growth in Uganda?

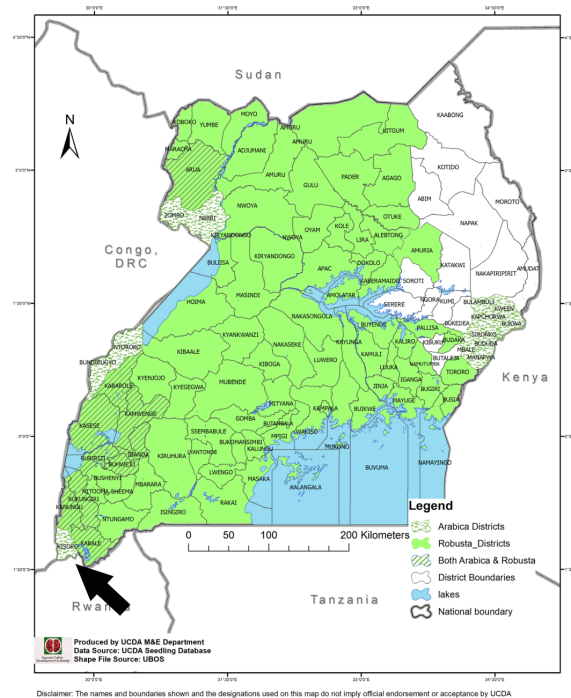
“One thing that excites me about what I know about coffee tourism is first of all it helps the coffee farmers to double their income... That's one source of additional income beyond the coffee you are producing. Number two. When coffee tourism takes place. It is rare for tourists to visit your coffee farm or the coffee tourism spot and they leave without buying the coffee souvenir for what they have just experienced. That's another source of income. That pushes farmers into the next level of value addition because you begin processing and packaging locally, the coffee that would add more income to the farmers.”- Interview 01

To determine if coffee tourism could generate inclusive growth with benefits that spread beyond the coffee farmer requires understanding the current expectations for costs and revenues, identifying the various types of models that exist now, and seeing how, if successful, those models could contribute to spreading benefits in a given community.

What follows are two coffee projects that have each existed for at least two years each. Each includes a breakdown of the cost structure to understand the potential for impact in the community. All are in arabica-growing regions and located near national parks, two of which are in the top three in attendance.

Kisoro Coffee Project

Figure 6: Map of Kisoro, Uganda



Source: UCDA M&E Department

Located in the southwest region of Uganda between Bwindi Impenetrable National Park and Mgahinga Gorilla National Park, Kisoro is the home of a coffee project that has been running since 2012. The farms produce between 500-800 kg/year of green coffee. According to the tour operator, this coffee project started after a USAID intervention focused on coffee production, beginning with two families in 2012. A third family was added in 2016, at a point when the high season was delivering consecutive months of

over 30 visitors. This suggests the possibility of expansion after a point of about 220 visitors, or 110 per family, per year.

The farmers in the area often work with a local organizer that pays them higher rates for the quality of their coffee due to the organizer’s export contracts. The farmers interviewed reported a range from 6,000 UGX (US\$1.60) on the low end to 10,000 UGX (US\$2.67) per kilogram. This arrangement compares favorably to the \$1.32 per kilogram paid to coffee growers in 2019 (International Coffee Organization, n.d.).

Establishing the expected revenue from coffee will set a baseline to understand the potential impacts of a tourism project. For a yearly yield of 500 kilograms, the expected return would be between US\$800 and US\$1,335. For a yearly yield of 800 kilograms, the expected return would be between US\$1,280 and US\$2,136. Of note, these projects produce more than the average. Taking the expected yield, farms of 0.44 ha (1 acre) producing coffee at an Improved level can expect a yield of 500 kilograms per year, with those at a Recommended level producing around 800 kilograms.

Table 7 - Kisoro Coffee Projects - Visitor Data

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
2012	4	3	12	2	5	24	21	34	18	10	13	32	178
2013	14	3	8	0	0	11	25	20	39	22	10	28	180
2014	2	2	6	1	2	21	20	32	34	11	6	13	150
2015	4	12	12	2	10	28	26	36	38	16	12	24	220
2016	14	10	4	12	7	34	37	36	30	4	8	18	214
2017	12	23	11	4	18	42	45	32	41	33	25	35	321
2018	32	38	24	8	9	54	42	37	48	28	37	46	403
2019	17	8	18	10	13	45	47	89	59	23	30	49	408

The revenue breakdown for a US\$15 guest visit was split three ways: US\$5 for the tour operator, US\$2 for the office, and US\$8 for the farmer. In this example, these are the estimated profits per family.

Table 8 - Kisoro Coffee Project - Estimated Profits

Year	Total Visitors	Revenue/ Tour Guide	Revenue/ Company	# of Farms	Revenue/Farm	Visitors/Month/Farm
2012	178	US\$890	US\$356	2	US\$712.00	7.42
2013	180	US\$900	US\$360	2	US\$720.00	7.50
2014	150	US\$750	US\$300	2	US\$600.00	6.25
2015	220	US\$1100	US\$440	2	US\$880.00	9.17
2016	214	US\$1070	US\$428	3	US\$570.67	8.92
2017	321	US\$1605	US\$642	3	US\$856.00	13.38
2018	403	US\$2015	US\$806	3	US\$1,074.67	16.79
2019	408	US\$2040	US\$816	3	US\$1,088.00	17.00

Given the tour operator’s estimate, a 500kg-producing farm would ordinarily expect to make US\$1,105 (at an average 8,000 UGX per kilo) from their harvest. With this model, the revenue per farm nearly equals their expected coffee revenues in the project's 7th year. Even the revenue from the project’s first year, with only 40% of the visitors, would add US\$712. For a farm producing 800 kilograms of coffee, the expected yearly revenue from coffee production would be about US\$1,820. This is significant for the family, bringing the lowest-producing farms to about the PPP-adjusted poverty line for Uganda of US\$2,077/year/household. The higher-producing farms would be pushed above it.

What is missing here is a deeper understanding of the impacts on the community. Additional products are being considered for the project, including a homestay priced at US\$30/person and US\$50/couple, which would have further impacts, including the potential to employ locals to help prepare food, further benefits through purchasing local produce, and the increased revenue from an overnight stay. Despite the availability, however, there is very little current demand from tourists, with under 10 visits of this sort recorded.

Still, tourism is just one option for increased revenues. Improving the quality of the crop can have similar effects. 85% of coffee producers in Uganda have intercropped small farms ranging in size from well under half a hectare (less than 1 acre) to 2 hectares (4.95 acres). Taking the one-acre measure, the impact of

improving coffee yields is just as significant. The average improved yield for arabica is 472.7 kgs/acre/year and the average recommended yield is 805kgs/acre (Mugoya & Global Coffee Platform, 2018). Though a Recommended yield does require more inputs, the revenues in Kisoro, under the circumstances described above, would push a family from US\$850-US\$1,360 for the year to US\$1,400-US\$2,240. One way of providing those inputs could come from the cash generated by tourism.

In this context, however, these farmers need to produce coffee at a certain quality threshold to secure the rates from the local coffee organization. Still, those improvements to the coffee may in turn open the coffee farmers to consistent tourism flows and a steadier income throughout the year.

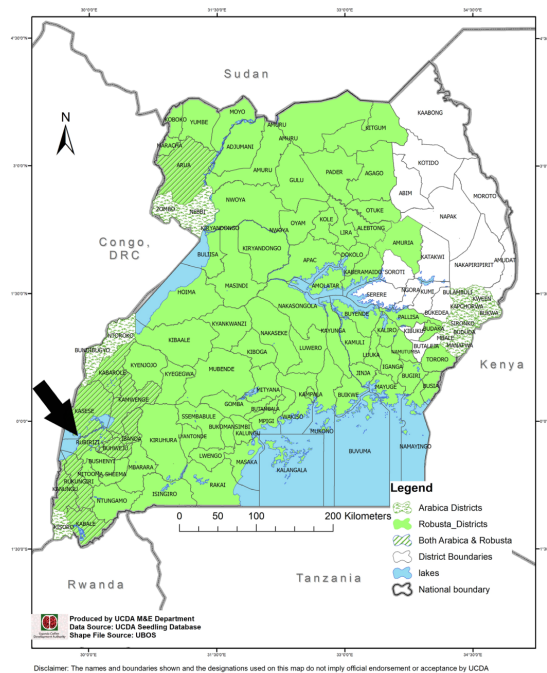
In absolute terms, a flow of 400 tourists to a project lifts three households above the poverty level. However, additional Kisoro stakeholders described the indirect impacts of tourism as seen by coffee sold at their hotels and lodges (coffee producers offered discounts to lodges, who in turn promote the coffee tours without taking a fee). Similarly, the organizing coffee project buys this coffee at a premium and sells through their cafe, through exports, and to hotels/lodges, using the incomes to finance projects that help with farmer healthcare, educational programs, school clubs for children, engaging youth through sports, developing income-earning opportunities for ex-poachers, offering micro-lending opportunities, as well as upskilling (Gorilla Highlands Coffee, n.d.).

Accommodation and local guides remarked on the impromptu organization of these tours and the related limitations, suggesting that 80% of tours arrive with pre-planned itineraries did not allow for a spur-of-the-moment booking. The activity was more often mentioned to guests who had a spare morning or afternoon after gorilla trekking. Additionally, hotels and lodges don't receive extra benefits for promoting these trips besides the discounted coffee. Given that coffee tours are generally conducted as 2–3-hour activities, coffee tourism does not by itself warrant an additional night's stay.

A survey of tour operator websites confirms stakeholder interviews about the availability of coffee tourism trips, but they are rarely being pre-booked. Local stakeholders believe it is tour operator awareness, while tour operators suggest it is the lack of interest from tourists. While the linkage between the two needs to be addressed, it is clear at this point that the tour operators are acting according to the current lack of demand.

Queen Elizabeth Coffee Project

Figure 7: Map of Queen Elizabeth National Park, Uganda



Source: UCDA M&E Department

Queen Elizabeth National Park is on the western side of Uganda and is the 2nd most visited park in the country with 24% of all visits for 84,752 visitors in the period from July 2018 to June 2019. The local coffee project was started up in 2018 with an investment of US\$300, including the materials necessary to welcome guests for a coffee experience, including winnowing baskets, mortars, pistons, roasting pans, charcoal stoves, and other components to the roasting experience. The first year saw 220 guests visit for an estimated revenue of US\$2,885. This suggests that the startup investment was only 10% of the first year's revenues. Maintenance is included as part of each ticket.

According to the project's organizer, the ticket pricing changes based on the demand. In the low season, indicated in black in Table 9, tickets were US\$10. In the high season, indicated in green, tickets were US\$15.

Table 9 - Queen Elizabeth National Park Coffee Project - Visitor Data

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
2018	10	13	8	12	18	28	35	17	9	21	27	22	220
2019	15	13	17	18	30	31	17	18	5	21	19	21	225

Given the pricing difference between low and high season tickets, the total revenues in low and high seasons, the total comes out to:

Table 10 - Queen Elizabeth National Park Coffee Project - Yearly Revenues

	Low Season Revenue	High Season Revenue	Total Revenue
2018	US\$830	US\$2055	US\$2885
2019	US\$1140	US\$1665	US\$2805

Table 11 - Queen Elizabeth National Park Coffee Project - Ticket Revenue Breakdown

Categories	Low Season (US\$10/visit)	High Season (US\$15/visit)
Service Providers Working	US\$3	US\$5
Guides	US\$3	US\$5
Input Expenditure (e.g., snacks)	US\$1	US\$1
Maintenance & Repair Fund	US\$2	US\$2
Community Benefits, Scholastic Materials, Charitable Organizations	US\$1	US\$2
Total	US\$10	US\$15

The direct and indirect impacts of this project are more evident than the others studied. Guides as a group would have made approximately US\$900 from this project per year, as would the three families working to care for the coffee project. Given the average coffee farmer makes US\$435, this additional US\$300 for participating in a coffee tourism project part-time represents a 40% improvement on expected income.

Promotion and marketing for this project were limited. Guests found out about this project through either a national tour company or one of four nearby lodges. Lodge representatives promoted the tour to guests who stay for more than one night, but it is not having an impact on ALOS.

Coffee tourism, as it currently exists in Uganda, is a low-cost, low-volume additional excursion for tourists visiting parks. In this state, it can generate modest returns which can have significant income effects on a very small number of coffee farming households.

4.4 What are the prospects for successful coffee tourism in Uganda?

Two potential metrics for defining the success of tourism in Uganda were laid out in previous scenarios. Applying those to coffee tourism means asking if its implementation could meaningfully impact one of those two forecasts for tourism in Uganda. The first would be if it could meaningfully attract a significant number of tourists who would not otherwise have visited Uganda. The other would be if it could function as a compelling enough activity to have visitors stay an additional night in the country.

At this point in its development, coffee tourism is too small a product to have a substantial effect on the bottom line of tourism at a national level despite the prevalence of coffee farms around the country. That is not to say tourism to these coffee-growing regions does not exist, or that tourism products are not being developed, but currently, it is not having an impact on visitor flows.

Taking the gorilla tourism visitors as a starting point, if 25% of the 20,000 tourists visiting each year participated in coffee tourism, that could significantly benefit 45 coffee-farming households. Keeping in mind that there are 1.7 million smallholder coffee farmers, it suggests that coffee tourism won't have a material impact on rural development in Uganda and an indiscernible effect on the larger economy. Still, that impact on those 45 households is likely to have spill-over benefits to the local communities and it will also enhance and diversify the Ugandan tourism product.

While it is difficult to discuss the prospects for successful coffee tourism in Uganda without also acknowledging the tourism sector itself with the COVID-19 pandemic, the data and analysis here have tended to focus on the complete years leading up to the pandemic to get a sense of the real lifecycle of the product.

With that perspective, the stakeholders, as laid out in the five guiding areas, have promising starts but lack the connectivity in the current stage to create a more formidable sector.

1. **Tourism flows & marketing** - The potential for tourism to help market an agricultural product in the international marketplace has been seen with wine (Mitchell & Hall, 2006, 324). Still, despite the regional potential, despite acclaim as one of the better coffee producers in the world, and despite an increasing push toward coffee production, there is a lack of real collaboration and concerted efforts between both the tourism and coffee value chains. This is clear at the government level, where slow developments between agencies have stakeholders on the ground wondering where the effort is, and on the ground where a lack of capacity prevents producers and guides from better promoting themselves.
2. **Government support** - At the stage coffee tourism is currently at, this is a mostly irrelevant factor. Though official budgets show the government supporting coffee tourism and creating MOUs between coffee and tourism organizations, stakeholders express more pessimistic views. Beyond governance issues come issues of accessibility and infrastructure, ones that individual stakeholders cannot be expected to surmount. The uncertainty in knowing when a site is accessible could be deterring more significant flows, keeping the product one that is more spontaneously offered on the site, and while just one example, it shows there are more foundational issues to be resolved.
3. **Partnership & communication** - This is the key issue. Structuring partnerships between tour operators, lodge owners, and a small number of coffee farming households can lead to significant benefits. Coffee stakeholders on the ground seem more sensitive to the impacts, while tourism stakeholders rarely mentioned it. This suggests the coffee industry, and the potential for tourism products, is currently not appealing to tourists, and tour operators are not pursuing nor promoting it. More effective partnership between the sectors, and vertical communication, is necessary.
4. **Product development** - Coffee tourism stakeholders suggested training timelines from four-to-seven days to product development timelines of up to three years. There are successes at the coffee producer level, with projects that receive an average of 15 visitors a month earning up to US\$1,000 for the year as they depend less on the seasonality of coffee production. More could be earned with transportation fees, additional site visits, and upsold products. There are even indirect benefits (supported anecdotally) of farmers making personal connections and exporting directly, but that remains difficult to track or predict and would require further study to analyze

the impact. A path for product development has been set, and though it can still be improved so that more stakeholders benefit and more tourists are aware, it has prospects for success.

5. **Education & training** - One established coffee stakeholder suggested that despite the prevalence of coffee tours throughout the country, only five plantations in Uganda are truly set up to handle the level of a visit that coffee professionals would expect. This group, which could include exporters and hospitality professionals, would have higher needs for local producers to have coffee knowledge, and they may want to see additional elements of the coffee production process. While the capacity exists, the timeline for raising the capacity of more farmers and their products seems years off. There seems to be a push to train people faster when the development of these products requires experience to go along with training, suggesting the potential benefits of products are still years out. Given that stakeholders were doubtful of the quality of the training, this is an area that will impede the sector's growth.

Finally, there is a failure in communication between national tour operators and local guides and producers. It is here where tour operators might have the leverage to have an impact on ALOS that this tourism offering is falling short. The prospects for successful coffee tourism depend on improvements from each stakeholder. Demonstrated projects show a path to follow that includes small but positive mutual benefits among coffee producers, accommodations, tour guides, and tour operators. But as of now, these bookings are happening mostly on-location and at the moment, limiting growth and the impact that this type of niche tourism could have in Uganda.

5. Conclusion

Coffee tourism is still in a nascent form in Uganda, existing along established tourism routes and taking advantage of gaps in schedules and a niche offering to build sustainable projects. The idea motivating this study in Uganda was to understand in what way coffee tourism could bring benefits to coffee producers, and whether its benefits could act as a tool for inclusive development that helps meet basic needs, which without tourism would not have happened.

One of the temptations of coffee tourism is the promise of doubled income for coffee farmers that are living below the poverty line. There are several cases where proportionally significant revenue has been

established, but it does not happen by accident. It requires, above all else, existing tourist flows. Then, its impacts can be shared and amplified if there is a high level of coffee quality as well as a supportive, collaborative network of coffee producers and coffee enterprises. As other coffee projects demonstrated, it is possible to attract a consistent, if weak, flow of tourists, but without proper planning, the spread of benefits is limited.

These projects have shown growth without national interventions, and though the government and national organizations move intentionally toward guidelines, MOUs, and developing projects, further short-term growth and development will come through tour operators and smallholder farmers working together.

So can coffee tourism drive inclusive growth? On the national scale, it is unlikely. While national development is not actively impeding its development, it is slow in developing the necessary linkages between coffee production and tourism that could create more awareness for the sector, an active ingredient missing that could motivate tourists and put pressure on tour operators to open up the flows. Even if coffee tourism captured a significant share of the gorilla tourism market in Uganda, it would remain a very limited activity and would benefit a very small number of farmers.

But as far as growth on a local scale and stabilizing incomes for coffee producers, stakeholders have been successful in channeling consistent flows to their projects when thoughtfully implemented. It is feasible for smallholder farms to achieve doubling their revenue. In the established projects studied, coffee tourism was implemented after the farms were employing certain farming techniques, including organic ones.

Further use of the value chain model with on-the-ground fieldwork would broaden the scope of this activity and trace further the impact of tourist spends, giving more insight into coffee tourism as it exists as well as what sorts of returns on investment it could be expected to deliver once tourism flows return.

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Appendices

Appendix 1: Sample Interview

Sequence of Questions - Individual Stakeholder Level

How have you experienced coffee tourism?

In what way do you deal with coffee tourism?

What have you done to promote/encourage/develop coffee tourism, if relevant?

What do you think about coffee tourism as a potential tourism product in Uganda?

How can it financially affect the guides? The farmers?

Where could coffee tourism work? And why?

Where do you think it won't work? And why?

How do you feel about combining the coffee experience with tourism?

Do you feel tourism can make a positive impact on the community?

Do you feel like Ugandan tourists would participate?

What statistics do you have related to tourists attending coffee tourism sites?

How many tourists visit a month?

What do tours cost?

How does the money get shared among the guide/farmer/tour operator/association?

How long have you been involved in coffee? Or tourism?

Appendix 2: Budget & Timeline for Setting up Demo Centers

Information was received from tourism stakeholders on the proposed budgets for setting up coffee tourism projects in Uganda.

Setting up Demo Centers in Kyambura and Kambuga

Item	Units	Unit Cost [UGX]	Cost
Drying Racks (Wire Mesh, Timber, Logs, Nails, Labour)	2	250,000	500,000
Pulper (South Africa)	2	1,000,000	2,000,000
Clearing	2	100,000	200,000
Brand Development (Graphics Design, Media campaign, Packaging, Content, Trail Mapping) Setting up Coffee Club at Nyaka Vocational School	1	1,500,000	1,500,00
Branded Coffee (100G)	50	4,000	200,000
Branded Coffee (250G)	50	8,000	400,000
Farmer Mobilization	2	100,000	200,000
Total Cost			5,000,000 [US\$1,333]

Work will be completed in 2 weeks.

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Setting up Demo Center in Kambuga only

Item	Units	Unit Cost	Cost
Drying Racks (Wire Mesh, Timber, Logs, Nails, Labour)	1	250,000	250,000
Pulper (South Africa)	1	1,000,000	1,000,000
Clearing	1	100,000	100,000
Brand Development (Graphics Design, Media campaign, Packaging, Content, Trail Mapping)	1	1,500,000	1,500,00

Setting up Coffee Club at Nyaka Vocational School			
Branded Coffee (100G)	50	4,000	200,000
Branded Coffee (250G)	50	8,000	400,000
Farmer Mobilization	2	100,000	200,000
Total Cost			3,650,000 [US\$973]

Work will be completed in 1 week.