**USAID/Jordan Local Enterprise Support Project**

**(USAID LENS)**

**strategy to support the adventure travel industry in jordan**

JANUARY 5TH 2017



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USAID LENS Strategy in Supporting Adventure Travel Industry in Jordan

# Why USAID LENS is working in Adventure Tourism

USAID LENS is designed to help create economic growth among local, underserved communities in Amman, Tafilah, Aqaba, Irbid, Zarqa and Karak. The strategic approach of the Project is to identify products and services available at a local level that can be sold to new, more diverse, more profitable markets. To achieve this, USAID LENS identified four key economic sectors: tourism, food processing, transportation and ICT as either economic sectors that could contribute most directly to local economic development and create jobs and revenue.

Adventure tourism, as a sub-set of the tourism sector, is one of the fastest growing tourism industries worldwide, currently valued at USD 263 billion[[1]](#footnote-1).There are significant advantages to adventure tourism for an economy, such as an increased resilience to market shocks, higher spending retention rate in local communities, social-cultural exposure that helps break down barriers, and a far higher return-of-customer rate, as compared to classical tourism. National examples include countries such as Czech Republic, Slovenia, Chile and Estonia, all whom have developed their adventure tourism industries over the last few years to generate increased tourism revenues. The impact of adventure travel on local communities has been well documented. In a 2015 study, the Adventure Travel Trade Association (ATTA) and the United Nations World Tourism Organization (UNWTO) noted that of the total revenue generated through adventure tourism, 66% remains in the local economy. [[2]](#footnote-2) As such, USAID LENS has developed an array of initiatives across the Adventure Tourism value chain.

At a strategic level, USAID LENS is working on helping Jordan become a regional destination for adventure travel by establishing the private sector foundations required. This comprises of supporting mechanisms that include assessing the economic potential of various adventure tourism activities, providing linkages and benchmarks for the private sector through which they can learn from best practice, developing new linkages between MSEs and larger operators, or by organizing the private sector so that they can better support and manage their respective industries. To date, these activities have been focused on the following areas:

* **Mountaineering:** including improving the organization of companies in the hiking, cycling, rock climbing and canyoneering, developing primary and secondary level research to examine the potential of the industry, attempting to establish a collective organizing body to support the industry, and working on creating an official adventure guiding program.
* **Scuba Diving:** providing a set of recommendations to amend current regulations governing the industry, hosting the first and second ever Jordan Dive Show, promoting scuba diving in Jordan.
* **Home-based Businesses and Artisanal Food Producers**: including end-to-end support for home-based businesses producing high-end local food, supporting in product development, packaging, logistics and marketing. This will include a broader campaign and initiative to raise awareness over the quality of Jordanian foods, their history and culture, and to institutionalize HBB food-processor support through a local Business Service Provider
* **Experiential Tourism:** targeting skilled members from local communities, including farmers, artists, cooks and others to train and consult them to start providing hands-on experiences, then linking them with tour operators and other tourism businesses.

USAID LENS is also working to provide support at a national policy level by disseminating research and marketing materials, advising government on strategic direction and providing technical expertise through training programs to help create a more business enabling environment.

This document outlines the primary activities of USAID LENS in adventure tourism and the suggested next steps for the Project.

MOUNTAINEERING

# Establishing an Organizing Body for the Mountaineering Sector

As noted in the Report on the Mountaineering Industry, Jordan is in urgent need for an organizing, representative body to support the sustainable development of the mountaineering industry. Whether an association or society, the body must be comprised of the key stakeholders – formal or informal – working in the industry. It will serve as a center for information, guidelines and standards in the mountaineering sector. The establishment of the Jordan Mountaineering Association (JMA) however must be a consultative process that includes key stakeholders. More than five individual attempts have been made to establish the JMA.[[3]](#footnote-3) Most have failed after the first two or three meetings, as a result of poor moderation, unclear mandates and disagreements over technicalities.

1. **Establish JMA:** establishing the Jordan Mountaineering Association will require all entities to come together, and the steps below need to be fulfilled in order to complete the establishment of the JMA.
   1. Present industry sizing of the mountaineering sector: present the total estimated economic impact of the mountaineering sector on local communities and
   2. **Meet with Groups:** USAID LENS has already conducted 5 meetings with the groups and companies related to mountaineering and adventure. This is an ongoing process, regular meetings need to take place for all the relevant groups (formal and informal). [[4]](#footnote-4)
   3. **Agree on JMA Functions & Blaws:** a crucial step is agreeing on what the JMA will be responsible for and its main action plans and functions. This should begin with an agreed upon legal structure of the association; membership types, board members, etc. The following are some of the JMA functions:
      1. **Rescue plans:** the JMA will be creating rescue plans in cooperation with the Civil Defense and the Jordan Air Ambulance Center (JAAC), as a way to mitigate risks associated with accidents. Search and rescue plans for the areas and canyons mostly used will be crucial for the entire mountaineering industry, and safety should be the foundation of mountaineering activities.
      2. **Carrying capacity:** each canyon has its own capacity to hold numbers of people. Specifying how much each canyon can “carry” will be done by the JMA and members should follow the standards in order to minimize any risks associated with big groups and low guide to group ratios, as well as minimizing environmental degradation which is caused by big groups and minimal supervision. The JMA will deploy a simple management information system to log when and where groups will be taken, which will be shared with Civil Defense and the JAAC.
      3. **Mapping routes & canyons:** the JMA will work on mapping routes and trails for hiking, canyoneering and climbing as shared knowledge for members. The JMA will need to compile existing maps, create new ones and continuously update any changes due to environmental effects over time.
      4. **Research:** the knowledge and experience that adventurers already have are abundant, and should be shared with all members. Research needs to be expanded, in the long-term experts will be invited to produce content on Jordan’s adventure and mountaineering sector.
      5. **Database of companies/groups:** a database of companies and groups will continue to be updated under the JMA’s mandate, as a way to include new groups, guide new groups towards the appropriate registration, and add new members to the association.
      6. **Members’ services:** USAID LENS will examine the type of services the JMA could offer its members in return for annual fees. This may include offering maps, trainings, rescue drills or other operations.
      7. **Benchmarks:** USAID LENS will draw on the experiences of similar organizations such as the American Mountain Guides Association, the American Alpine Club, the British Mountaineering Council, among others.
   4. **Sustainability Plan:** sustaining the JMA is crucial for its survival. Planning for sustainability will be done in the beginning and plans will continuously be updated. Membership fees and gear rental were some of the ideas introduced during the meetings and must be agreed upon moving forward.
2. **Election:** The JMA will be a democratic body, members will vote on major decisions and initially will vote on how the JMA is structured and how it will function.
3. **Register JMA:** with the support of MOTA, the JMA will be registered as an association, which will take time as it has to go through different governmental bodies.

# Drafting Regulations to Encourage Business Registration

Much of the mountaineering industry is comprised of businesses that are either unable or unwilling to register. As noted in the Mountaineering Assessment Report, up to 90% of tours in mountaineering, and more than 85% of the total revenue generated, is estimated to be from unregistered businesses or informal groups.

In order to increase the rate of formal operators and to ensure that the industry will not continue to foster illegal activities, USAID LENS recommends that the law relating to tour operators be re-designed to enable a more conducive legislative environment that will bring mountaineering businesses out of the shadows. To achieve this, the Ministry of Tourism and Antiquities should initiate the drafting of a new bylaw or instruction that will allow for the establishment of an operator in the mountaineering industry. The following approach will be required as part of this process.

1. **Research on International Benchmarks:** relating to legislative frameworks in the mountaineering sector. USAID LENS will examine which frameworks are applicable to Jordan and how they can be adapted to meet local needs.
2. **Consultation with Key Stakeholders, Both Public and Private:** In order to ensure stakeholder buy-in and not to significantly disrupt the existing legal industry, USAID LENS will conduct a number of focus groups and meetings to ascertain how the draft law should function, the parameters and legal requirements of the business. This process is critical as it will create the legislative framework and set expectations among key stakeholders. Furthermore, it will ensure that once approved, maximum impact will be achieved vis-à-vis business registration and formalization**.**
   1. **Draft Policy Recommendations:** key stakeholder groups – such as those held through the JMA, will be asked for input on the drafting of the recommendations. USAID LENS will facilitate the process of drafting the legal changes, providing international and local expertise as required.
3. **Submission of Policy Paper and Proposed Changes to MoTA:** USAID LENS will submit, in conjunction with key stakeholders through the working groups, the policy changes relating to the law.

# Drafting Instructions for Specialization in Mountaineering Guiding

The current licenses for guiding are not sufficient for adventure guides. General tour guides and site-specific tour guides study to learn Jordan’s history. Adventure guiding requires a different skillset, physical abilities and strong communication skills. For example, an adventure guide is required to have first-aid training, group management skills, strong communication skills and certain technical skills if any ropes or other equipment is used. Currently, the guides who are taking groups on adventure activities are getting trained on their own, resulting in an industry with many different qualifications but without anything being recognized officially and nationally.

1. **Conduct Benchmarking Research on Standards and Requirements Relating to Guiding:** Using the report produced by international experts Jack Delf from the ATTA and Steve Long of the UIAA, USAID LENS will put forward a number of certification programs that would be applicable to mountaineering (hiking, canyoning, trekking, and climbing) in Jordan. These standards will be presented to both the Ministry of Tourism and Antiquities and the stakeholders of the JMA.
2. **Agree on best standards to follow:** since many certifications and training programs exist, the best standards to follow will need to be agreed on. This will likely be on different levels, with basic guides covering only hiking, while adventure specialists will be able to lead climbs, cover a range of rope specialties and be able to carry out rescue operations.
3. **Royal Society for the Conservation of Nature (RSCN) Register to Become a Recognized Certifying Body by the Higher Education Authority:** The RSCN is the optimal agency for the training of guides in adventure and mountaineering activities. Through their excellent training academy in Ajloun – which is currently underutilized – the RSCN will be able to train guides in the full range of activities. Furthermore, their networks and connections to local communities and familiarity with various groups will allow them to identify potential guides quickly. The Jordan Tour Guides Association (JTGA) and JMA will provide supporting roles in this endeavor, with the JTGA ultimately issuing the licenses.
4. **Procure International Training Firm for a TOT:** an international firm who can provide training on the adventure guide standards and skills (such as ICO Pro for example) will be procured to conduct a training of trainers. The trainers should comply with certain requirements.
   1. **TOT on adventure guide training:** the TOT will take place and certify master adventure guide trainers.
   2. **Training of adventure guides:** the master trainers will then go on to train the first official adventure guides.
5. **JTGA issues license:** The JTGA will then issue the licenses for the adventure guides, in parallel with other adventure activities such as the Jordan Trail Association prepared to take on more guides.

SCUBA DIVING

# Supporting the Aqaba Diving Association

The Aqaba Diving Association (ADA) is one of the few adventure travel associations in Jordan that has successfully brought together private and public sector stakeholders to advance the interests of its industry. Having grown from 7 to 21 private sector members in 2015 – through the support of USAID LENS - and through the hosting of the Jordan Dive Show, the organization has become a nationally recognized body that is raising local and regional awareness of the potential and importance of diving tourism in Jordan.

1. **Fund-raising:** support will be provided to the ADA to help the organization improve its fund-raising ability and make the association more financially sustainable, so that it can re-invest in the industry.
2. **Restructuring**: improving the standards and quality of diving in Jordan and effecting an enforcement capacity that will require operators to keep up-to-date on all licenses.
3. **Marketing**: The ADA will also conduct ongoing marketing efforts to support companies and to promote diving across Jordan.
4. **Management Support**: The ADA will hire a new manager who will be able to better oversee financial and operational matters, provide on-going support to members and be a contact point for the organization for members or key stakeholders.

# Second Annual Jordan Dive Show

Following the success of the first annual dive show in Amman, USAID LENS and the ADA will host the second Jordan Dive Show in Aqaba. The Second Annual Jordan Dive show will comprise of a 3-day event in which Jordanian and international divers will conduct the largest ever national clean-up dive, a major underwater international photography competition and serve as a suppliers’ showcase. Dates for the event have yet to be confirmed. The following components/activities will be undertaken for the dive show:

1. **Establishing New Sponsorships**: Building on the momentum of 2016, the ADA will bring on board new partners including the Aqaba Development Corporation, ASEZA, JTB, Jordan Marine Conservation Society (JREDS), international suppliers (TBC) and potentially the Adventure Travel Trade Association to promote diving both within Jordan and regionally.
2. **Developing New Diving Packages**: This year, as part of the show, and for the first time ever, the ADA have announced that they are promoting a new package among 9 of its members that offer diving holidays at a substantially discounted rate, making it price-competitive (for the first time) with Sharm El Sheikh.
3. **Hosting Jordan’s First Ever Major International Underwater Photography Competition**: the ADA – partnering with local and international photography and diving companies - will be able to better brand Aqaba as a prime destination for underwater photography due to its low currents, high-visibility and all-year diving.
4. **Hosting a Record-breaking Clean-up Dive:** in order to raise awareness about the damage caused by littering and pollution of Aqaba’s seas, the ADA will bring together more than 300 divers to have a major clean-up dive in the country. This will be done in partnership with the Marine Park and JREDS.

# Promotional Video Advertising Diving in Jordan

USAID LENS, working with the ADA and the Jordan Tourism Board North America, will produce a video showcasing the very best of scuba diving in Aqaba. The firm hired will be required to advertise and market the video through its network and channels, and will develop content that can be showcased across social and multimedia platforms. The video campaign will also be used to promote the Second Annual Jordan Dive Show:

1. **5-10 minute Video**: the video will be developed by a high-end film crew and will capture a range of local, cultural experiences and will ‘mimic’ the experience of a diving package, including shots of dive sites, local food, cooking classes, artisanal foods, campsites in Wadi Rum and Petra.
2. **Footage Style:** the style of the video will be shot through a first-person perspective using 4k video recording and interviews with companies, dive masters and locals.
3. **Network:** as per the requirement in the application, the film crew must demonstrate extensive outreach and networking capacity in order to achieve the most impact through the marketing mechanism.

Home-based Businesses and Artisanal Food Producers

Jordan has an extraordinary culture of food that remains relatively unknown and under-explored. Its accessibility is limited as well, as the majority of touristic restaurants concentrate on Lebanese-style mezze offering little variation. This is in stark contrast with what is actually available across the country, with dishes such as *charcheel*, *acoub*, *rashoof* and *makmoura* all part of Jordanian cuisine, yet largely unavailable in most restaurants across the country. Furthermore, there is little development or ‘reconstruction’ of Jordanian dishes, as can be found increasingly the US, Italy, Japan and the UK.

USAID LENS has been working in the last two years on developing a greater local and international recognition of local cuisine and gastronomy. This has entailed activating Home-based Businesses (HBBs) to become major suppliers of artisanal foods, improving their quality and packaging, and marketing them to major buyers.

# Upgrading HBB Food Products and Packaging

Over the last 2 years, the USAID LENS Project has developed a series of interventions that will sustainably integrate HBBs into the supply chains of Jordanian and international retailers, hotels, restaurants and exporters.

1. **Regulatory Obstacles**: working with the Ministry of Municipal Affairs, USAID LENS has assisted in the redesign of the bylaw allowing businesses to register from home. In 2017, USAID LENS is providing the Ministry of Municipal Affairs, the Ministry of Industry and Trade and the Greater Amman Municipality with technical policy expertise to help draft the instructions relating to business registration as a home-based business (HBB).
2. **Training in Food Quality & Hygiene**: Training more than 300 HBBs in food safety and handling, including HAACP and Good Manufacturing Practices and ISO. Working closely with the Jordan Food and Drug Administration, USAID LENS has been supporting businesses to meet requirements in food production and processing.
3. **Upgrading Equipment:** offering support in the form of equipment and in-kind technical assistance to improve productive capacity; and improving product quality and packaging
4. **Market Linkages:** to date, in 3 months alone, USAID LENS has already developed over 50 contracts with buyers for HBBs in food processing. By the end of 2017, the Project estimates that up to 150 – 200 contracts will have been drafted.

# Marketing Local Produce

As part of the process in helping Jordanian food producers, USAID LENS will lead a national marketing campaign to encourage local buyers and vendors to include more local produce and goods. By overcoming a number of consumer concerns – such as quality and hygiene – and by advertising the quality and existence of a wide variety of produce, USAID LENS anticipates a significant behavioural shift in local, Jordanian consumer demand. As part of this work, USAID LENS will be conducting the following activities:

1. **Activating Local Chefs**: USAID LENS will be conducting a familiarization trip around Jordan to showcase the very best in local Jordanian cuisine, cooking styles and illustrating the complexity and depth of different recipes. This tour will include top chefs from across the country with a film crew that will advertise Jordan’s gastronomic legacy. As part of this work, USAID LENS may include international chefs in partnership with the Jordan Tourism North America’s efforts to invite international chefs to Jordan.
2. **Jordan Food Week**: USAID LENS will hold the first ever Jordan Food Week to promote and celebrate authentic Jordanian cuisine, and to provide an opportunity for hundreds of local food businesses and artisanal food producers to showcase their products to new potential clients. The objective is to generate trade and consumer interest to establish new linkages between businesses, marketing and increasing awareness about the benefits of locally-sourced food, and showcasing specialty artisanal foods from local communities in Jordan.
3. **Incentivizing Tour Operators**: generally, tour operators in Jordan have been relatively reluctant to include adventure travel and gastronomy as part of their tour packages. Indeed, the structure of the tour operator model is based on a classical system with international agents, and as such, limits the operators’ capacity to diversify its products and change its marketing strategies. USAID LENS is issuing a RFP to offer in-kind marketing support and video production to those tour operators who are willing to include experiential tourism as part of their packages, whether local or internationally marketed.
4. **Supporting National Campaign to Market Food**: In line with the above, USAID LENS will launch and activate a national campaign to buy local food and to engage with local grocery stores, supermarkets, restaurants, hotels and retailers. This campaign will focus on having Jordanians recognize the potential of the food industry in Jordan and the quality of its gastronomic legacy.

Experiential Tourism

Experiential tourism can be identified as soft adventure and is a specific type of adventure tourism that includes a hands-on experience, typically with a skilled local community member who leads the traveler onto an authentic and cultural experience. USAID LENS works on developing experiential tourism in Jordan, addressing a growing need in the tourism market.

# Developing Experiences & Creating Linkages

1. **Identifying Potential Experience Hosts:** utilizing different channels and tools, skilled individuals across Jordan are mapped out and identified, and are generally one of the following:
   1. Cooks and food & beverage producers
   2. Farmers and shepherds
   3. Traditional artists
2. **Assessing & Testing Potential Experience Hosts:** USAID LENS has developed tools for assessing the hosts themselves as well as the experience, by considering different factors to assess the quality and potential of a great authentic experience. Experiences that are positively assessed are then tested for further development.
3. **Online-booking & Marketing:** USAID LENS has partnered with the below entities to link the experiences with existing online platforms to help them access new markets and eventually increase their revenue
   1. Airbnb[[5]](#footnote-5)
   2. Lokal travel [[6]](#footnote-6)
4. **Filming Experience Videos:** through primary data collection USAID LENS found two major needs from the Jordanian tourism market, specifically amongst inbound tour operators, which are the inability to find experiences and insufficient resources to produce high-quality videos for marketing and selling the experiences. Therefore USAID LENS published an RFP for the production of 16 experience videos that will later on be used as an incentive for tour operators to include experiences in their itineraries.

1. Stowell, S. and Heyniger, C. (2013), ‘Adventure Travel’s Response to Climate Change: A Success Story from India’, Meeting the Challenges of Climate Change to Tourism: Case Studies of Best Practice, Cambridge Scholars Publishing, Newcastle upon Tyne. [↑](#footnote-ref-1)
2. According to the Adventure Tourism Annual Report, 2015, pp.. where classical tourism contributes only 10% of spend to a local community, adventure tourism achieves closer to 66%. [↑](#footnote-ref-2)
3. Multiple attempts had been made by local private sector organizations and a number of national institutions, such as the Jordan Tourism Board between the period of 2009-2015. However, disagreements over practices and personal conflicts resulted in failure, in addition to a lack of vision or clear strategy for the sector at large. [↑](#footnote-ref-3)
4. Stakeholders map is attached in Annex I [↑](#footnote-ref-4)
5. <https://www.airbnb.com/real/amman> at the end of the page, three experiences are included by Iraq al Amir Women Association, and two more experiences in Azraq will be included in May 2017 [↑](#footnote-ref-5)
6. <https://www.lokaltravel.com/explore> find Jordan on the drop down menu, all the experiences have been provided to Lokaltravel by USAID LENS [↑](#footnote-ref-6)