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RURAL TOURISM VALUE CHAIN ASSESSMENT REPORT

LEBANON INDUSTRY VALUE CHAIN DEVELOPMENT (LIVCD) PROJECT

FEBURARY 2014

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PROJECT**

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1. INTRODUCTION

Lebanon is a country of contrasts, where natural beauty lays beside chaotic development and expansion of cities. Mediterranean landscapes and high arid mountains open up to fertile valleys in the hinterland, and steep valleys in the North cede to mild hills in the south. The population in Lebanon is a mosaic rather than a ‘melting pot’, where homogeneous groups dominate regionally. Lebanon has always been considered a unique country to visit. All promotional materials show its diversity in terms of tourist experiences and the generosity its people.

The economy in Lebanon which was seriously damaged during the period of the civil war (1975 to 1990) rests on the strength of the private sector, and considerable support from the Lebanese entrepreneurial diaspora. Information and statistics on the tourism sector are lacking and make analyzing the tourism value chain and then upgrading the value chain challenging. As a result Lebanon's natural beauty and cultural heritage as the basis for a tourism industry has not reached its potential. Lack of government oversight also means that standards and guidelines are not readily respected by stakeholders, including tourists. Though a Charter for Responsible Tourism in Lebanon was declared in 2008, it has not been implemented.

Rural Lebanon is not well developed and lacks infrastructure for tourism, yet it represents excellent value for the experience travelers are seeking. Realization of this value cannot occur unless a strong vision is created and a good management plan for tourism in rural areas is established.

The goals of the LIVCD tourism report are described as follows:

- Present a typology of different value chain segments and sub-segments
- Analyze the current situation of tourism and rural tourism in Lebanon
- Identify the business environment
- Conduct a SWOT analysis by region
- Identify the dynamic trends in rural tourism
- Draw new strategies based on the current findings
- Identify potential partners

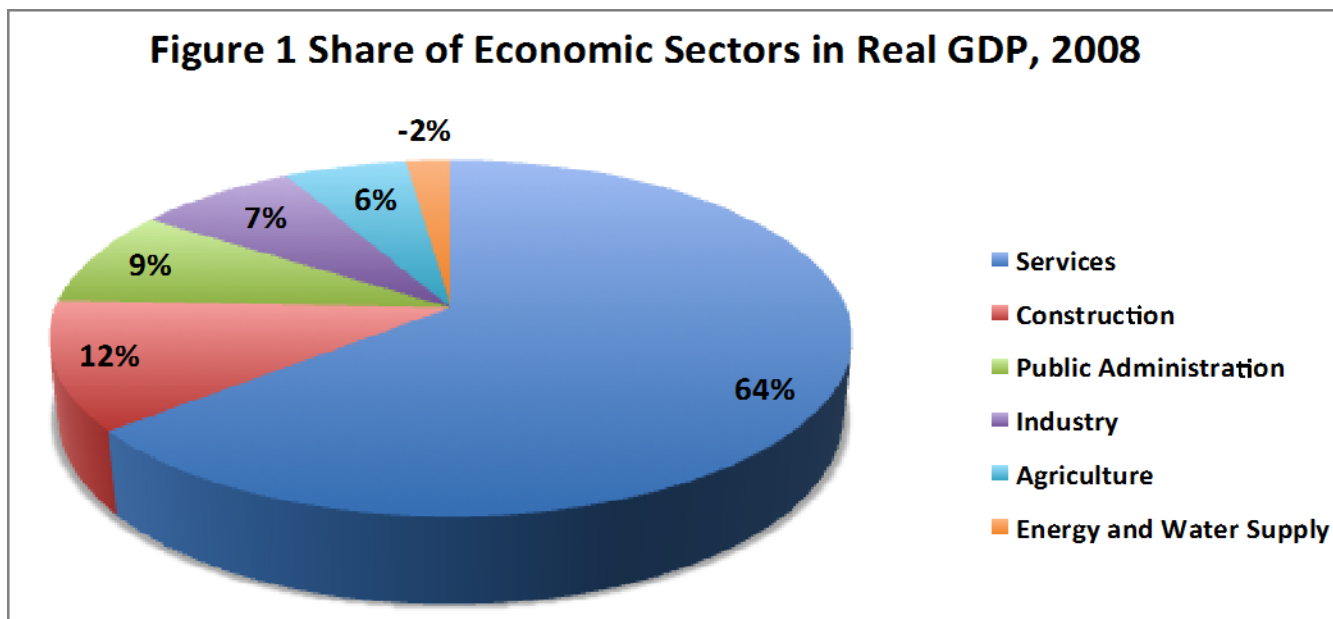
2. IMPORTANCE OF TOURISM IN THE MACROECONOMY

1.1 CONTRIBUTION TO GDP

The Lebanese economy is dominated by the services sector, which constituted 64 percent of the economy in 2008, followed by the construction sector at 12 percent, and Public Administration at nine percent (Figure 1).

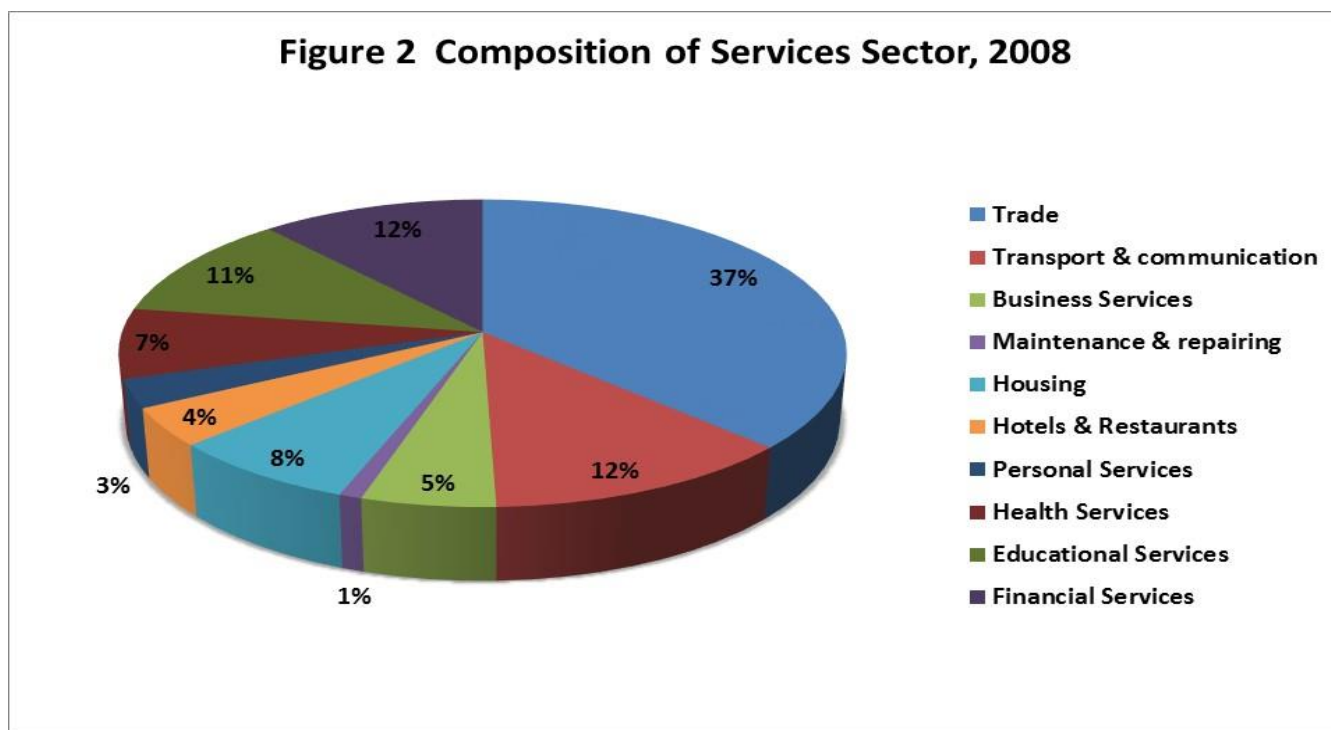
Tourism is part of the services sector, under the Hotels and Restaurants sub-sector. The services sector also includes Trade (the largest sub-sector, at 37 percent), transport and communication, business services, maintenance and repair, housing, personal services, health services, educational services, and financial services. Figure 2 shows the breakdown of the Services sector into its sub-components.

FIGURE 1 SHARE OF ECONOMIC SECTORS



Source: IMF

FIGURE 2 COMPOSITION OF SERVICES SECTOR 2008



Source: IMF staff calculations based on data from UNDP Unit at Presidency of the Council of Ministers: Economic Accounts of Lebanon, Retrospective 1997-2007; 2008., in Mottu and Nakhle, 2010

The hotels and restaurants sub-sector makes a minor contribution to total GDP, comprising only 2.7 percent of the Services sector in 2008 per the National Accounts, the last year available from the Central Administration of Accounts. However, the full share of the tourism sector in the economy is in reality larger than this, as the tourism sector includes spending captured in other sub-sectors including transport and communication, personal services, and even health services through medical tourism. The World Travel and Tourism Council, using a methodology consistent with the United Nations Tourism Satellite Account methodology (See Table 1 for an explanation of this methodology), estimates that in 2012 the Travel and Tourism sector in Lebanon made a direct contribution of \$4.12 billion, or 9.3 percent of GDP, with a wider total contribution (including transportation, accommodation, catering, recreation and services for visitors) of \$11.14 billion or 25.1 percent of GDP (in 2011 dollars).

TABLE 1: WTTC CALCULATIONS OF ECONOMIC CONTRIBUTION OF TOURISM TO GDP & EMPLOYMENT

The World Tourism & Travel Council (WTTC) defines Travel & Tourism as the activity of travelers on trips outside their usual environment with duration of less than one year. WTTC calculates the economic impact of such activity as a contribution to GDP & Employment as follows (consistent with UN's Tourism Satellite Account methodology: TSA RMF 2008):	
DIRECT TRAVEL & TOURISM CONTRIBUTION	
Internal Tourism Consumption	Visitor Exports Spending within the country by international tourists for both business and leisure trips, including spending on transport.
	Domestic Travel & Tourism Spending within a country by that country's residents for both business and leisure trips. Multi-use consumer durables are not included since they are not purchased solely for tourism purposes.
	Government Individual Spending Government spending on individual non-market services for which beneficiaries can be separately identified. These social transfers are directly comparable to consumer spending and, in certain cases, may represent public provision of consumer services. For example, it includes provision of services in national parks and museums.
INDIRECT & INDUCED TOURISM CONTRIBUTION	
Indirect & Induced Impacts	Capital Investment Includes capital investment spending by all sectors directly involved in the Travel & Tourism industry. This also constitutes investment spending by other industries on specific tourism assets such as new visitor accommodation and passenger transport equipment, as well as restaurants and leisure facilities for specific tourism use.
	Government Collective Spending General government spending in support of general tourism activity. This can include national as well as regional and local government spending. For example, it includes tourism promotion, visitor information services, administrative services, and other public services.
	Purchases from Suppliers Purchases of domestic goods and services directly by different sectors of the Travel & Tourism industry as inputs to their final tourism output.
	Spending of Direct & Indirect Employees
TOTAL TRAVEL & TOURISM CONTRIBUTION – TO GDP, EMPLOYMENT	

The tourism sector in Lebanon has grown since the end of the country's civil war in 1990, although it has not yet returned to pre-war levels. In the early 2000s, the sector experienced huge growth as the government began focusing on revitalizing tourism. From 2000 to 2003, WTTC estimates that the Travel & Tourism sector's direct contribution to GDP grew over 4,000 percent, from \$0.1 billion to \$ 4.18 billion (in 2011 US dollars), while the total contribution to GDP grew from \$0.27 billion to \$9.89 billion in the same period.

Between 2005 and 2013, Tourism GDP grew 16 percent in terms of direct contributions and 25 percent in terms of total contribution to GDP. The WTTC projects that by 2023, the direct contribution of Travel & Tourism to GDP will grow to \$7.41 billion, and the total contribution will grow to \$20.61 billion (all figures in 2011 US dollars).

It is clear that the performance of the tourism sector in Lebanon is heavily dependent on the security situation in Lebanon and the region. The tourism sector's direct contribution to GDP dropped nearly 6 percent after the assassination of Prime Minister Rafic Hariri in 2005 and the subsequent internal instability of the political and security situation, remaining at this level through the 2006 Israeli war and subsequent instability in 2007.

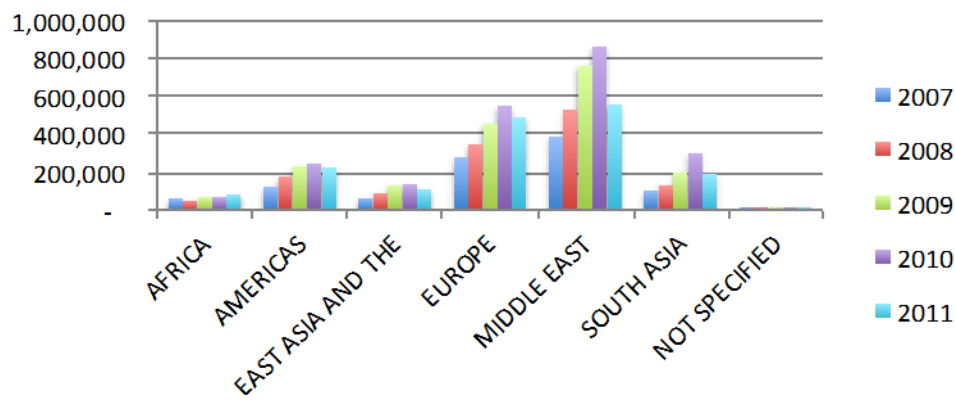
The share of tourism in Lebanon's GDP grew strongly between 2000 and 2003, although it has been declining since 2003 except for a slight increase between 2008 and 2010. This can be explained by the growth in other elements of the services sector particularly financial services, health services and transportation and communication, as well as growth in the construction sector.

1.1.1 FOREIGN TOURISTS

Regional shares

The most important segments of tourists to Lebanon in terms of absolute numbers of arrivals are those from the Middle East (especially Iraq, Jordan, Kuwait, Saudi Arabia, and UAE) followed by Europe (particularly France, which includes Lebanese expatriates traveling on French passports, as well as Sweden, United Kingdom, Italy, Germany, and Turkey), South Asia (Iran) and the Americas (United States and Canada; this category also includes members of the Lebanese Diaspora traveling on these passports.) It must be noted that the figures include all arrivals from the country of origin, and not all of these are tourists; for example, most of the arrivals from South Asia, East Asia, and the Pacific and Africa are migrant workers.

FIGURE 3 TOURIST ARRIVALS TO LEBANON BY REGION

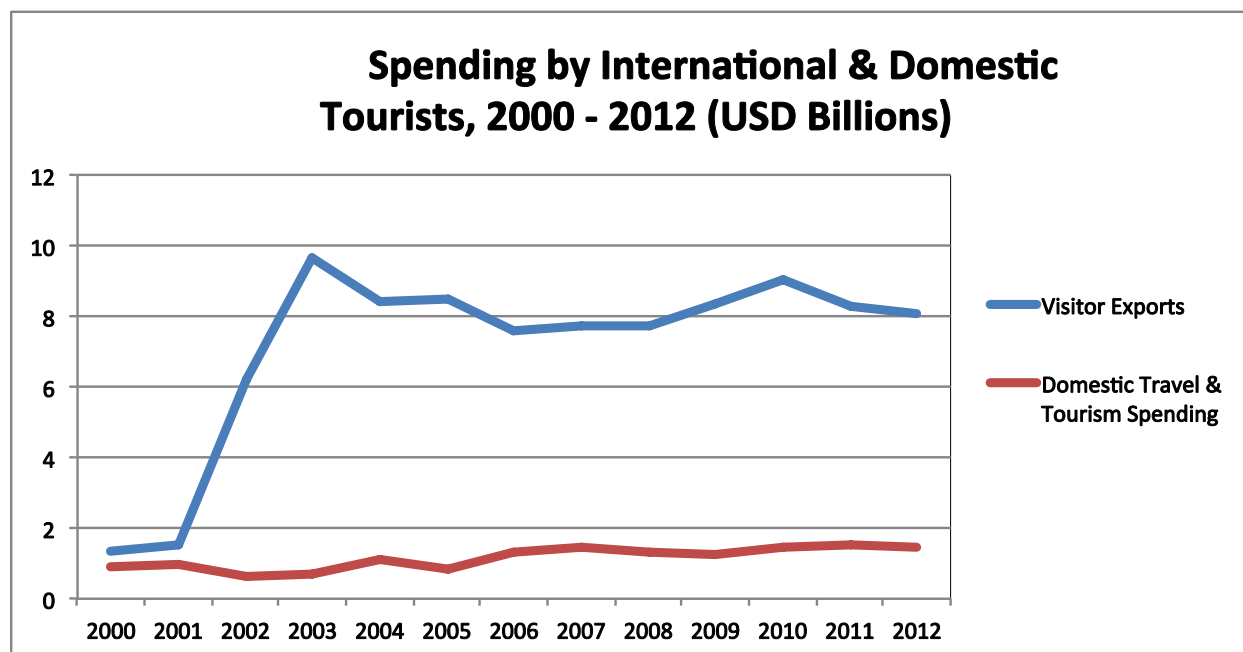


Source: WTO, 2012

International Tourist Spending (Visitor Exports)

The WTTC defines Visitor Exports as “Spending within the country by international tourists for both business and leisure trips, including transportation spending.” Growth and decline of Visitor Exports in Lebanon are, logically, closely tracked to tourist arrivals, with a decline of nine percent between 2005 and 2008, and an increase after 2008. However, between 2008 and 2010 Visitor Exports increased only 16 percent, while tourist arrivals increased 63 percent in the same period suggesting that the tourists who came after 2008 spent far less in Lebanon than previous visitors. This may reflect the decline of GCC tourists who tend to be the highest spending, as opposed to tourists from European and North American countries, many of whom are Lebanese expatriates traveling on foreign passports or members of the diaspora, and tend to stay with friends and family and spend less money during their holiday.

FIGURE 4 SPENDING BY INTERNATIONAL & DOMESTIC



Source: WTTC

According to IDAL, tourists spend an average of \$3,000 per visit, with tourists from Saudi Arabia spending the most (accounting for 23 percent of total spending), followed by Kuwait (accounting for 10 percent of total spending). European and North American tourists, as noted above, tend to spend less than other visitors.

1.1.2 DOMESTIC TOURISTS

The WTTC defines Domestic Travel and Tourism Spending as “spending within a country by that country's residents for both business and leisure trips.” Single-use durable goods that are attributable to tourism, such as luggage and travel sets, are included, while multi-use consumer durables that are purchased for purposes other than tourism, such as cameras and cars, are not included. Domestic Travel and Tourism spending is, overall, much lower than Visitor Exports (see Figure 9), and also fluctuates much less than international tourist spending from year to year.

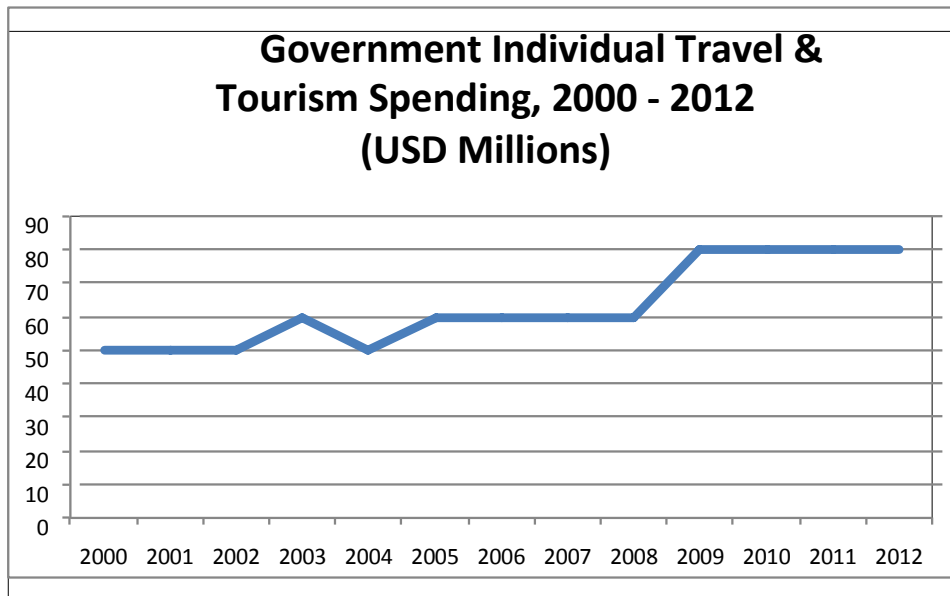
1.1.3 GOVERNMENT SPENDING

The WTTC defines Government Individual Travel and Tourism Spending as “spending on individual non-market services for which beneficiaries can be separately identified. These social transfers are directly comparable to consumer spending and, in certain cases, may represent public provision of consumer services. For example, it includes provision of national parks and museums.” Other ministries that contribute to tourism spending include the Ministry of Interior, which deals with municipalities

through which tourism sites are supported; Public Works for provision of airports, ports, public transportation, roads and signage). Ministries which could support tourism development include the Ministry of Agriculture, through support for agro-tourism activities); Youth and Sports Ministry of Environment through support for nature as a theater for tourism (. IDAL also supports the tourism sector through promotion and support of investment in tourism projects, including hotels and shopping centers.

Specifics of the Government of Lebanon’s investment in the tourism sector are discussed in greater detail in Section 4.2, Public Support Programs and Donor Projects.

FIGURE 5 GOVERNMENT INDIVIDUAL TRAVEL & TOURISM SPENDING



Source: WTTC

1.1.4 CAPITAL INVESTMENT

WTTC defines Capital Investment as “spending by all sectors directly involved in the Travel and Tourism industry [and] investment spending by other industries on specific tourism assets such as new visitor accommodation and passenger transport equipment, as well as restaurants and leisure facilities for specific tourism use.”

WTTC estimates Capital Investment in 2012 of \$1.3 billion.

1.2 ECONOMIC CONTRIBUTION OF TOURISM: EMPLOYMENT

Employment in the Tourism sector in 2012 was estimated at 120,000 jobs directly related to tourism, or 8.9 percent of total employment, according to the WTTC. Jobs include those with hotels, travel agencies, airlines, taxis and buses, restaurants, and leisure activities such as tourist attraction sites (e.g., guides, visitor center staff, entry fees, and other associated costs.) The WTTC estimates that the Tourism industry indirectly contributed 322,400 jobs in 2012, accounting for 24 percent of total employment.

The majority of employment in the tourism sector in Lebanon is in food and beverage serving activities, followed by accommodation services, and a smaller number in travel agencies. There are also some minor employment opportunities involved in staffing touristic attractions. Indirectly, tourism also supports employment in transportation and other sectors that support tourism.

The majority of tourism enterprises in the sector in Lebanon are SMEs, and many are family run businesses. Most of the employees are Lebanese, but in some traditional restaurants and mid-range hotels in Beirut, some Syrian workers are hired to reduce costs. Additionally, in some cases the functions of cleaning and maintenance are performed by migrant workers from Africa and South or Southeast Asia.

Employment in the Tourism sector has declined since 2010, tracking closely with the decline in tourist arrivals. The WTTC projects that there will be a 2.1 percent decline in employment in the tourism sector in 2013, with only 117,500 jobs directly related to the sector. Restaurants and hotels report reduced business requiring contraction of their staff, with many establishments closing down since 2010.

- WTTC Methodology for Estimation of Travel and Tourism's Direct Contribution to Employment
- "For non-OECD countries, we estimate Travel & Tourism's direct contribution to employment by taking account of both Travel & Tourism's direct share of GDP and an estimate of the relative productivity of Travel & Tourism compared with the rest of the economy. This relative productivity estimate is derived from looking at the relationship for countries where TSAs [Tourism Satellite Accounts] have been carried out between the level of development of the economy as measured by GDP per head and the relative productivity of Travel & Tourism. Less-developed countries tend to have higher productivity in Travel & Tourism than the economy average; high GDP per capita countries tend to have lower productivity in Travel & Tourism than the economy average. "
- Source: Methodology for producing the 2013 WTTC / Oxford Economics TRAVEL & TOURISM ECONOMIC IMPACT RESEARCH, Oxford Economics 2013

1.3 Importance of Tourism to the Rural Economy

The precise share of rural tourism in the total tourism sector in Lebanon is unknown. The majority of hotels are in Beirut (46 percent) and along the coast (29 percent), where nightlife and beach tourism is centered. While there are fewer hotels in rural areas, the small size of the country makes it possible for many visitors to participate in ‘spider’ tourism, staying in Beirut hotels with departures to touristic sites in rural areas and return to Beirut every day. It is interesting to note that, according to the Head of Promotion, at the Ministry of Tourism the rural tourism sector was less affected by the 2012 downturn than other traditional elements of the tourism sector.¹ This may be in part because the rural sector tends to attract domestic tourists, who do not limit their domestic tourism because of regional instability.

Table 2 presents the main types of tourism available in Lebanon; the rural areas of Lebanon offer many different types tourism products in the leisure, business, medical/wellness, and educational categories. Indeed, rural areas offer nearly all the same types of tourism as Beirut and the coast, albeit in much lower volumes at the present.

TABLE 2: TYPES OF TOURISM IN LEBANON

	Available in Beirut/Coast	Available Outside Beirut/Coast
LEISURE		
Beach	X	
Nightlife	X	x
Shopping	X	
Winter Sports		x
Cultural	x	x
Religious	x	x
Adventure		x
Eco-Tourism		x
Car Racing	x	x
BUSINESS		
Meetings, Incentive Travel, Conventions and Exhibitions	x	x
Team Building/Retreats	x	x
MEDICAL/WELLNESS	x	x
EDUCATIONAL	x	x

¹ <http://www.ttgmena.com/Update-Lebanon/>

However not all of these types of tourism constitute “rural tourism” just by virtue of existing in rural places; the definition used by LIVCD of rural tourism is given in Box 2 below

Defining Rural Tourism

- Rural tourism can be defined as simply tourism taking place in rural areas, as noted by the European Community. However, if considered from the perspective of a tourist’s motivation for seeking rural tourism, the definition should be expanded to consider the pursuit of an experience and connection focused on a rural way of life and gaining a closer perspective of nature that may not be available in an urban setting. Thus, rural tourism can be defined taking into account the elements of cultural and natural resources that provide the foundation of this unique experience, and the inherent connection to preservation of these resources in rural communities through sustainable development of economic opportunities. LIVCD defines rural tourism as:
- Tourism taking place in rural areas
- Tourism involving small-scale development
- Tourism allowing the interaction with nature, agriculture, and traditional culture
- Tourism that is locally controlled and developed for the long-term benefit of the local community
- Tourism representing the rural environment, economy, history, and location

While rural tourism comprises a small percentage of total tourism in Lebanon, the importance of rural tourism to the rural economy is large. The rural areas of Lebanon represent a large portion of the total land area, but a decreasing percentage of the population. According to the World Bank, the rural population in Lebanon was 735,772 in 1980 representing 27.56 percent of the total population; the rural population decreased 54 percent to 543,168 in 2011 representing only 12.75 percent of the total population.² Rural to urban migration is a well-studied phenomenon in Lebanon. The search for improved economic opportunity has brought many people, particularly youths, to urban areas. However, because of Lebanon’s small size most migrants are able to return to their villages often. This connection to the ancestral village persists even in generations who were born in the urban areas; though the majority of the population lives in coastal and mountain communities such as the capital Beirut, Tripoli, Saida, Tyre, Zahle, and Baalbek, these people frequently visit family or their own houses in the village.

Though there are no precise data available regarding the extent to which tourism contributes to rural economies, rural tourism is considered a major component to the rural populations’ economic recovery. Rural tourism provides employment and income generation opportunities, and may have the effect of reducing rural to urban migration that has occurred at staggering levels as noted above. Additionally, rural tourism provides an opportunity to preserve the natural resource base and cultural heritage of Lebanon. Agriculture, forestry, and unique scenery occupy large areas of land and represent- along with the villages themselves- the main stock of natural and cultural heritage which serves as the foundation of rural tourism. Rural tourism can provide the incentive necessary to provide an economic return to these resources that will induce their preservation for generations to come.

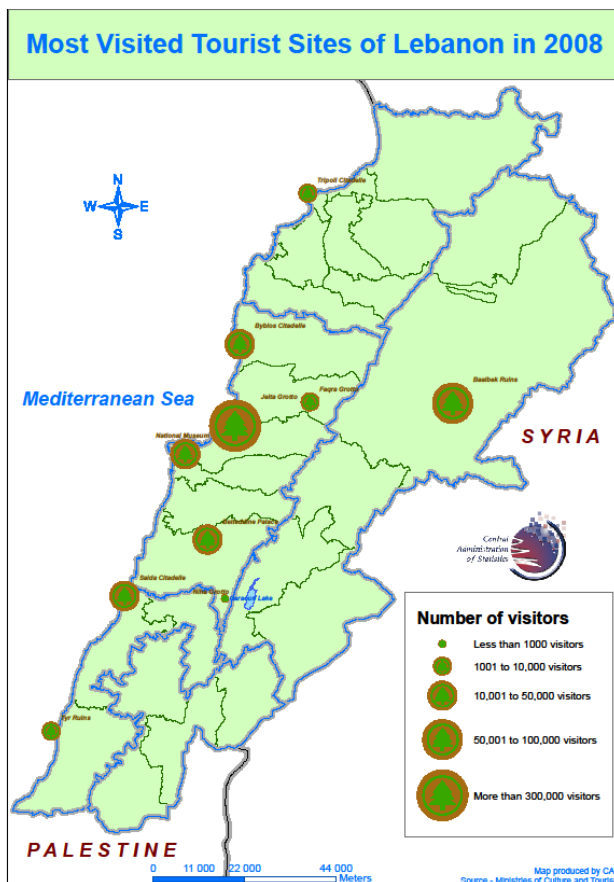
² <http://data.worldbank.org/indicator/SP.RUR.TOTL>

Employment and Income

The rural tourism sector provides employment and income to the populations in these areas, especially in the accommodation (hotel, guesthouse, youth hostel, camping area) and food and beverage serving establishments (restaurants and snack stands). The touristic sites located in rural areas including archaeological sites, museums, nature reserves, amusement and adventure parks provide employment for guides and guards, and staff at visitor centers and souvenir shops. In areas that offer summer and winter sports there is also employment for sports equipment suppliers. There is also an indirect employment effect for grocery stores, food processing units, and transport providers. In the productive sector, some craftsmen such as pottery makers and other handicrafts makers, and farmers with wine-making units or fruit-picking offerings, gain income from tourism. Small industry suppliers such as carpenters and smiths provide signage in nature reserves and on hiking trails.

FIGURE 6 MOST VISITED SITES OF LEBANON IN 2008

Source (Central Administration of Statistics CAS 2012)



Investments in tourism activities in rural areas include accommodation (hotels as well as bed & breakfasts and hostels), restaurants, and tourism projects including amusement parks and nature-themed parks, and nature reserves. Investment in nature conservation and ecotourism projects has increased in the last ten years and offers an interesting model of rural tourism development. For many of these projects, such as the Forest of Cedars in the Shouf and the Lebanon Mountain Trail (LMT), cooperation with the local communities has been an integral part of project development. These projects have extended economic opportunities through direct employment of guides and guards, as well as indirectly through increased demand for accommodation and local products. Donor funding has leveraged this opportunity; for example, a USAID-funded program (DHAIFFEE) stimulated the demand for accommodation along the LMT to establish or support 45 guest houses to improve quality and marketing. The Al Shouf Cedar Society (ACS), with support from USAID, provided an opportunity at the Lebanese Biosphere Reserves in the Shouf to market local products, including honey, preserves, and craftwork at the reserve facility.

An estimation of actors in the value chain and employment by category of tourism businesses is provided in Table 2.

TABLE 3: TOURISM ACTORS AND EMPLOYMENT IN TOURISM OUTSIDE BEIRUT

Type	Number (est)	Total Employment – persons (est)
Airline Agency	39	400
Travel Agency	510	2,570
Eco-Tour Operator	35	200
Transport Company		
Taxis & Car Rental	250	1,200
Other	25	500
Dining		7,000
Mount Lebanon	564	
Bekaa	60	
North	150	
South	63	
Attractions		950
UNESCO World Heritage sites	5	
Archeological sites	50	
Protected Areas	25	
National Monuments	15	
Museums	60	
Hotels		5,000
Mount Lebanon	260	
Bekaa	23	
North	62	
South	26	
Alternative Lodgings		1,000
Furnished Apartments	138	
Monasteries	60	
Guesthouses	30	
Camping	8	
Youth Hostels	10	
Other	20	
Agriculture-related		2,000

Wineries	60	
Food Processing Units	50	
Conventional Farms	10	
Organic Farms	10	
Crafts		1,000
Sports		
Adventure Parks	6	100
Resorts	25	375

Present estimates of employment related to tourism outside of Beirut is over 22,000 workers. However, many of these positions are seasonal and part-time.

Distribution of income from rural tourism packages and products:

Business income in rural tourism is generated either through the sale of tourism packages by tour operators, or directly from the consumers, i.e. the tourism, to the rural tourism service providers inclusive of guides, restaurants, accommodation and others.

The tourism willingness to pay varies according to:

- The perceived quality of the services provided. The sizes of the tourists group, since some of the activities are priced by groups (hiking, site visit, ect).

Preservation of the Resource Base

The rural tourism sector has experienced growth in the last two decades, largely due to increasing interest in alternative types of tourism that utilize the natural resource base, known as eco-tourism and adventure tourism.. Related tourism products, particularly guest houses, have also increased in number as have the number of specialty tour operators focusing on rural tour packages.

A distinction should be made between eco-tourism, which places an emphasis on responsible use of the natural resource base, and adventure tourism which does not necessarily take sustainability into consideration. For example, the biosphere reserves are regulated by the Ministry of Environment and required to follow particular planning and management regulations related to conservation and rehabilitation, and sustainable resource management practices. In contrast, most other types of rural tourism activities are complete unregulated.

Negative Impact of Tourism to Rural Areas

Increasing tourism in rural areas is not without risk. An increased number of visitors naturally puts pressure on the infrastructure and resource base. Without proper planning, popular areas can face increased traffic congestion as well as wear on the road networks and demands on scarce water resources. Tourists can directly harm the resource base through uncontrolled ‘adventure tourism.’ Some tour operators and unprofessional club groups may not pay attention to sustainable usage of natural areas, and a lack of coordination and management can lead to too many tourists resulting in damage to the landscape, even if individual tourists are respectful. In other cases, areas can be damaged through improper use of ATVs and off-road vehicles, camping, certain caving and mountain climbing activities, and other unregulated activities.

These negative impacts can be minimized by strategic planning and management that engages local communities including key actors in the private sector and municipalities.

Proper management is needed to ensure sustainable usage of natural areas. User fees are a tool for sustainable management. If instituted at the right level, these fees can fund the appropriate infrastructure and enforcement of regulations to ensure sustainable usage of natural resources.

3. STRUCTURE OF THE RURAL TOURISM VALUE CHAIN IN LEBANON

Since tourism is a service industry, it is the traveler who creates the demand for the different elements of the tourism experience, and in analyzing the tourism value chain we follow the flow of the tourist through the chain rather than traditional value chain studies that examine the product.

The tourism value chain is comprised of the actors at different levels of service provision, who together facilitate the total experience for the tourist. Travel is initiated at the point of planning the trip (travel agent, internet, or other media providing promotion and information about the destination); the intermediary that transports the tourist to the destination (airline, boat, or road network); the outbound operator who packages tours, the inbound operator who receives and transports the tourist; and the actors who delivers actual tourism products to consumers, including accommodation, restaurants, and tourist sites.

FIGURE 7 TOURISM VALUE CHAIN



2.1 DESCRIPTION OF MARKET SEGMENTS

Definition of Market Segmentation

There is no widely accepted segmentation of the tourism market in Lebanon, either by the government or the tourism industry. This study uses a classical segmentation technique to group tourists according to

their common needs, characteristics or behavior and therefore interest in similar products. This allows understanding of the different types of tourists and development of marketing strategies. The segmentation in this study is based on four aspects of the markets: Geographical, Demographic, Psychographic and Behavioristic.

The Geographical aspect is the most influential because it is related to the flight route and length of travel which limit the duration of the package. For example, an overseas traveler) will not have enough time to visit Lebanon in only four days or six days, because he will not be ready to spend two days to reach Lebanon and two other days to get back to Canada for only four days of visit. The cost will be too high as well for a stay length of only four days. A tourist from Europe on the other hand needs only a few hours to reach Lebanon thus making the same four day stay cost efficient.

The Demographic aspect deals with the economic situation in wealthy and developed countries where people can afford to travel. These countries are represented mainly by Western European countries, U.S., Canada, Australia, Japan, GCC, and a few other rich countries. Another point of the demographic aspect is the similarity or dissimilarity in culture, race, ethnicity, and language that can influence the tourists' decision. For example Arabic speaking GCC citizens are likely to visit Lebanon where the population speaks the same language. Yet, there are tourists in non-Arabic speaking countries that seek a cultural or linguistic experience that is different from their own.

The Psychographic aspect is the foundation of any trip because the destination must be a safe and secure one in order to be considered viable. This perception of the destination by the traveler has different levels: For example French tourists are psychologically ready to visit Lebanon, a country that France once controlled and influenced, where the host community still speaks French; however French tourists may not dare travel to Lebanon in times of insecurity or when there are terrorism threats.

The Behavioristic aspect is related to what type of tourism experience the tourist is seeking. For example, a tourist may desire a full package, inclusive of airfare, hotel, transport and rigorous schedule of trips to attractions. Other travelers may prefer a smaller package with lots of free time. Independent travelers prefer to make all arrangements themselves, with little or no input from tour operators. The distinct behaviors dictate the types of packages or amount of individual attention required to create a positive experience.

MAIN MARKET SEGMENTS IN LEBANON

Using the market segmentation technique described above, this study defines four main market segments, or types of tourists, in Lebanon's tourism sector: 1) Domestic, 2) Middle Eastern, 3) Lebanese Diaspora, and 4) European. These segments are defined mostly on the basis of geographic considerations, grouping tourists according to their place of origin and therefore the cost of the air fare, and time and length of travel. Other factors considered in defining these segments include similarities in culture, race, ethnicity, language (demographic aspect); shared perceptions of the tourism destination, in terms of security for example (psychographic aspect), and shared preferences for activities in the tourism destination (behavioristic aspect).

1) Domestic: This segment comprises all the tourists who live in Lebanon, including Lebanese as well as expatriates residents. .

2) Middle East: This segment comprises all tourists coming from the MENA region, including western and Lebanese expat residents in MENA countries.

3) Lebanese Diaspora: This segment comprises all tourists who are Lebanese migrants and their decedents who live outside of Lebanon. For the purposes of this segmentation, Lebanese diaspora members residing in the Middle East are considered under category 2 above.

4) European: This segment comprises tourists coming from European countries.

Important Segments to Rural Tourism

The identified segments are additionally divided into sub-segments to identify those which are most important to the rural tourism sector. These sub-sectors are defined mostly by their behavioristic characteristics including the types of touristic activities they desire to undertake. See Table 3 and the expanded description of each segment provided below.

TABLE 4: SEGMENTATION OF THE LEBANESE TOURIST MARKETS

Segment: Domestic Tourists				
Sub-segments	Markets Aspects			
	Geographical	Demographic	Psychographic	Behavioristic
Schools and universities	Beirut and administrative area	Trips as a standard learning opportunity in an academic year; mainly private schools	Know where to go, love to discover, and are relatively aware of the security situation	Desire to enforce nationalism and citizenship; large numbers
Young adventurers	Beirut and administrative area	Middle class, cultivated, ready to spend money on sports and trendy activities		Demand for new trends in tourism
Discovery and culture	Beirut and administrative area	Middle class, cultivated		Desire to discover traditions and cultures in Lebanon
Expatriates	Beirut and administrative area	Cultivated and earn in foreign currency		Desire to discover the country they work and live in; search for quality services but desire simplicity
Families	Beirut and administrative area	Middle class, cultivated		Desire for new trends in tourism and love life; search for quality services, sometimes complex
Scouts and Summer Camps	All regions of Lebanon	All levels of the population		Desire to fulfill scout teachings and ideals
Elders	All regions of Lebanon	Prayer groups - pilgrims and retirees		Desire to occupy themselves in their free time; quality is not always essential

Segment: Middle East

Sub-segments	Markets Aspects			
	Geographical	Demographic	Psychographic	Behavioristic
Arab, Syrian or Jordanian families	Countries within a three hour flight	Same language and some similarities in culture	Aware of the situation in the Middle East and regain confidence in Lebanon very easily	Long stays, luxury, good time, good food, big spenders
Lebanese Expatriates of the GCC area	Countries within a three hour flight	Still in close relation with their mother country; at ease economically	Don't fear to visit during instability, especially for short periods	Desire to bond with their friends and families; enjoy nightlife and beautiful weather
Western Expatriates of the GCC area	Countries within a three hour flight	Cultivated and have the means to travel but enough time to go far away	They follow the travel warnings and get feedback from Lebanese friends	Desire good quality sometimes in simplicity, combined between nature, culture, sports, and local communities; search for quick travel weekends

Segment: Lebanese Diaspora

Sub-segments	Markets Aspects			
	Geographical	Demographic	Psychographic	Behavioristic
Families and Visiting Friends and Relatives	All continents	Have some economic means to spend in mother country; same culture but with a modern flavor	May fear insecure environments, but gain confidence more quickly than foreigners	Desire to bond with their friends and families; enjoy nightlife and beautiful weather
Youth summer camps	Europe, Africa, and overseas	Their parents have the means to offer them this travel to mother country; and they are cultivated	May fear insecure environments, but gain confidence more quickly than foreigners	Desire to go back to their elders' roots, and desire for trendy activities combined with traditional flavor

Segment: European

Sub-segments	Markets Aspects			
	Geographical	Demographic	Psychographic	Behavioristic
Retired Europeans	Western Europe	Cultivated, have economic means, in search of new destinations	Some countries have historical relations with Lebanon; however insecurity can make them vanish for long years	Desire good quality most of the time spider designed packages from Beirut; cultural activities in rural areas
Organized tours	Western Europe	Cultivated, have economic means, in search of new	Some countries have historical relations with Lebanon; however insecurity can make	Need good quality sometimes in simplicity, combined with nature, culture, sports, and local

		destinations	them vanish for many years	communities
Independent Travelers	Western Europe	Cultivated , don't spend too much money, in search for new destinations and meet other cultures	Some countries have historical relations with Lebanon; however insecurity can alter Lebanon's image; drifters may return fast because they are adventurers	Use cheaper services but search for close contact with local communities

1. Domestic Tourist market and its seven sub-segments including schools and universities, explorers, expatriates, families, scouts and summer camps, and elders. In the domestic market the main origin of the visitors to the rural areas is Beirut and its administrative area, where more than half of the Lebanese population reside (Beirut, and the districts of El-Maten, Keserouane, Jbeil, Baabda, and Aaley).

Duration of stay: Most of the trips are one day, a considerable number are one weekend or two days and one night; sometimes depending of the security situation can climb up to five days and four nights in the case of some schools who organize cultural trips known as 'green classes'.

Means of transportation: Mainly microbus (29 seats or Pullman 50 seats). The accommodation facilities are small regional 3 star hotels or Youth Hostels, monasteries, or guesthouses.

Catering: Large and diverse types with regards to each sub-segment: schools mostly dine in small restaurants or the youth hostels or the guesthouses; while the families use fancy restaurants; expatriates buy snacks or eat in guesthouses; older travelers dine in average priced Lebanese traditional style restaurants; young adventurers bring their own food or eat at guesthouses.

2. Middle Eastern tourist market and its four sub-segments, the GCC Arabs, GCC Lebanese Expatriates, GCC Western Expatriates, and Syrians and Jordanians (not including trans-boundary Syrian workers). This segment represents a large portion of total arrivals and includes both markets from the GCC area and other neighboring countries such as Syria and Jordan. A small part of this segment includes those Lebanese living and working in Arab countries who have the same needs as the Lebanese diaspora around the world, though with a specific interest in returning to their home village on frequent trips for short periods of time.

Duration of stay: Long stays up to one month or summer-long vacation.

Accommodation: Luxury hotels, or furnished apartments often in rural areas.

Means of transportation: Mostly rented cars or private vehicles imported for the summer period of stay. Some Jordanian groups may take the bus for touring.

Catering: All types of restaurants ranging from snacks to high end modern restaurants and traditional or Lebanese restaurants.

Activities: Leisure activities include shopping and malls. Little interest in sports activities.

3. Lebanese Diaspora and its two sub-segments, Visiting Friends and Relatives (VFRs) and Summer Camps. This segment includes Lebanese in all foreign countries and continents (other than the Middle East): Americas, Africa, Western Europe, Eastern Europe, and Australia.

Duration of Stay: They visit Lebanon during the major holidays (Christmas, New Year, and Easter) and during summer vacations. They stay for a relatively long time, at least two weeks. They are good spenders and look for quality services.

Means of transportation: Mostly rented cars.

Accommodation: Usually stay at the house of their parents or relatives, or in hotels or furnished apartments for a longer stay especially when they are accompanied by foreign friends.

Catering: Those visiting friends and relatives eat traditional dishes at home or at Lebanese high end restaurants. They may dine on as well on a typical dish at a guesthouse during a trip to a village.

Activities: This segment desires to bond again with rural Lebanon and its integral culture including food, nature, houses, and entertainment. Beginning in 2000, students of Lebanese origin began coming to Lebanon with student groups (through schools in the U.S., Europe, or other countries) to attend summer camps to learn Arabic and Lebanese culture.

4. European market and its three sub-segments: Full Package Elders, Explorers, and Independents and Backpackers. Two main markets emerge here: the organized tours and the individual visitors.

Duration of Stay: Geographically this market is at relatively short distance from Lebanon, and packages sometimes represent short stays, even a long weekend. Yet more frequently the stays of this group last from one week or longer (eight to 12 days is a common duration). Spring and fall are the high season for these travelers.

Means of Transportation: Minibus for organized tours and rented cars or even public transport for independent travelers or adventurers. Accommodation facilities are mostly guesthouses and sometimes small rural three star hotels.

Catering: This group searches for good Lebanese cuisine, such as a light snack or a restaurant with a complete menu.

Activities: Cultural manifestations and hiking are requested by Europeans. These tourists demand organized tours through a hostel or camp, however they also demand some free time.

TABLE 5: PERIODS OF VISITS AND SEASONS OF TARGETED SEGMENTS

Sub-Segment	Christmas & New Year	Winter	Easter	Spring	Adha	Ramadan	Summer	Fall
Schools & Universities		X		X			X	X
Adventurers	X	X	X	X	X	X	X	X
Explorers	X	X	X	X	X	X	X	X
Expatriates	X	X	X	X	X	X	X	X
Families		X	X	X	X	X	X	X
Scouts	X		X		X	X	X	
Elders	X		X	X	X	X	X	X
GCC Arabs	X	X	X		X	X	X	
GCC Lebanese Expatriates	X	X	X	X	X	X	X	X
GCC Western Expatriates	X	X	X		X	X	X	
Syrians & Jordanians	X	X	X		X	X	X	
VFRs	X		X		X	X	X	
Summer Camps	X		X				X	
Full Packages	X		X	X				X
Explorers	X		X	X			X	X
Independents & Backpackers	X	X	X	X	X	X	X	X

Rural Tourism in Lebanon: A Comparison to France

Since the Rio Summit in 1992, tourism is considered an important element of economic especially in rural areas and places of natural beauty. Many countries have used rural tourism as one means of providing incentives for rural dwellers to remain in the countryside. France invested in rural tourism to provide additional economic opportunities for rural people. Tourism in rural areas in France, which comprises a number of activities, witnessed an increase in the number of visitors since 1997. In that year it represented 35.5 percent of the total domestic market. Rural areas became the second preferred choice for French tourists after the “Sea destination” and before the “City destination”.

There are three different types of tourist in rural areas in France:

A – Back to the family sources clientele: members of the diaspora or city dwellers who go back to their home-village to visit their families and friends. This segment does not use the rural area for the purpose of discovery and their economic impact is different from the two following groups.

B – Social and associative tourism partisans: A form of rural tourism that was promoted in France from the 1960s. The government established modest social resorts such as camp grounds and holiday villages called ‘villages de vacances’ that allowed members of the working class to travel within the country. Their economic contribution is small and the quality of service is declining today in France.

C – Countryside lovers: This type of tourist is composed of relatively comfortable young retirees, childless couples, singles (hikers and sports fans) and foreigners from northern Europe (especially German, Holland, and England) and families with children. This clientele is demanding and expects high quality services in the countryside.

If we compare the three groups with the Lebanese market, we find that group A is represented by the city dwellers who grew up in the countryside and return home to their village every weekend, either because they own a weekend house, or to visit friends and relatives. While group B is not common in Lebanon, group C is common and a potential source of demand for rural tourism that can be exploited in the near term.

2.2 ACTORS IN THE RURAL TOURISM VALUE CHAIN

The actors in the rural tourism value chain may be considered in five levels. The actors at each level are illustrated in Table 5: Rural Tourism Value Chain Matrix.

Level 1: Information and Promotion: These actors are responsible for promoting tourism in Lebanon and providing the market segments with information about tourism offerings.

Independent Magazines & Websites

These include initiatives by independent associations and private sector actors. Two examples:

- *Hello Lebanon*, a directory of Lebanon businesses including hotels, restaurants, and other attractions and services targeting visitors. It contains short articles highlighting different tourist attractions around Lebanon, including those in rural areas. It is published six times per year by NineSixOne Supplement (new961.com) and distributed at the parking exit of Rafic Hariri International Airport.
- *Lebanon Traveler Magazine*, an initiative of Beyond Beirut under the USAID LBLI project, is published by Hospitality Services. The magazine shares Beyond Beirut's dedication to promoting tourist activity in rural areas. In addition to highlighting specific cultural and natural attractions, the magazine provides information about responsible tourism, customs and traditions of different areas, and useful information including a calendar of events, directory of service providers and bus routes inside and outside Beirut.

Internet & Social Media

Tourists are increasingly using the internet to find information about tourism products, and to plan and book trips. In parallel, actors in the tourism value chain are increasingly using the internet to provide information. Many Lebanese travel agents and tour operators have an online presence, and many have online booking capabilities. Individual rural tourism product providers, such as nature reserves, adventure parks and other attractions have websites or a presence on social media such as on Facebook. Thus there is an increase in the amount of information available, and ease of producing and accessing it. Creating a Facebook page can be done at very low cost, compared to designing, producing and distributing brochures, and can reach a larger audience.

Level 2: Outbound Operators: These actors are responsible for packaging and sales of tourism products to tourists.

Travel Agents – Outside and Inside Lebanon

There are over 500 traditional travel agents in Lebanon offering airline reservations and ticketing, hotel booking, transfer and car rental bookings, and sightseeing packages. Travel agents tend to focus on the traditional tourist sites like Baalbak, Byblos, Jeita Grotto, Beiteddine, Zahleh, and sites in Beirut. Some specifically promote packages for medical tourism, skiing, cultural sites, and wineries. Nature-based offerings include trips to the cedar reserves and the Qadisha Valley. Some Lebanese travel agencies have branches in Syria, Jordan and the Gulf countries.

Travel agencies in Europe and North America sell packages to Lebanon; in some cases these agencies have offices in Lebanon, or arrangements with other agencies in Lebanon. The packages offered by these agencies tend to be the same traditional packages offered by agencies inside Lebanon.

Tour Operators

The Association of Travel & Tourist Agents in Lebanon considers two categories of tour operators: traditional tour operators, and ecotourism/specialty tour operators.

Traditional tour operators focus on organized bus trips to the traditional Lebanese attractions including archaeological sites, shopping and nightlife, with some now offering adventure activities such as hiking and rafting. These tours tend to emphasize convenience and comfort.

Eco-tourism/specialty tour operators provide ‘outfitted trips’ focusing on historical, cultural, and natural tourism. These tours provide sustainable tourism experiences, with a minimal carbon footprint and interaction with the local community. There are approximately 35 of these eco-tourism operators in Lebanon.

Clubs

These are unlicensed groups who informally arrange outings, often for eco-tourism and adventure tourism.

Level 3: Inbound Operators: These actors are responsible for reception and transportation of tourists.

Tour Operators, Private Groups (Scouts, Schools, Churches) & Clubs

These groups package tours for international or domestic groups including arrangement of the transportation. This might involve bus or mini bus rental, or organization of taxis for small groups.

Transport Companies – There are approximately 275 transport companies outside of Beirut, including companies that operate taxis and buses for hire, as well as car rentals for self-drive. These transport companies often work with other inbound operators to provide the transport component of a package tour. They also sell directly to tourists.

Level 4: Tourism Product Providers: Actors responsible for delivering actual tourism products to consumers. These include:

Accommodation

Hotels & Furnished Apartments

There are approximately 370 hotels outside of Beirut (260 in Mount Lebanon, 23 in Bekaa, 62 in the North, and 26 in the South), and 138 tourist residences, also known as furnished apartments that are usually rented for long stays.

In 2010, the Ministry of Tourism released Decision 239 to adopt new classifications for tourism establishments (hotels, tourist residences, and restaurants) based on a system of one to five stars. The new classification system was developed by a private company, which will also provide inspection services. As of September 2012, 67 hotels throughout Lebanon were classified using this system.

Alternative Lodging

Outside of Beirut, a number of types of alternative lodgings are available. These include monasteries, guest houses, camping, youth hostels.

In September 2011, the Ministry of Tourism issued Decree 6298 to regulate guesthouses, defining them as “special Lebanese houses equipped to receive and shelter persons interested in all kinds of outdoor sports, cultural and environmental tourism. They are chosen in Lebanese regions and villages in order to introduce foreign and Lebanese tourists, equally, to the popular customs and traditions as well as to the ordinary Lebanese life and cuisine.” The regulation provides for specifications of guesthouses, conditions for opening a guesthouse, and the rights and obligations of the owner and the guest. A full copy of Decree 6298, in English, is provided in Annex 1.

Restaurants

There are over 800 restaurants outside of Beirut. The Ministry of Tourism's Decision 239 adopted in 2010 included a classification system for restaurants, classifying them from one star to five stars based on a set of criteria.

Touristic Sites & attractions

Touristic sites and attractions in rural Lebanon include

- World Heritage sites such as Baalbek, Anjaar, Qadisha Valley, and Byblos.
- Religious sites including Our Lady of Lebanon Harissa and Hamatoura Monastery.
- Natural wonders such as Jeita Grotto and the Cedars in the Shouf and Tannourine.
- Nature Reserves, including official protected areas identified by decree by the Ministry of Environment, such as Shouf Biosphere Reserve and Jabal Moussal Biosphere Reserve. These areas are strictly regulated for conservation and sustainable development of natural resources.
- Other natural reserve areas such as La Reserve in Afqa, which are not officially recognized by the government as protected areas and do not necessarily implement conservation plans, but provide eco-tourism related activities, as well as 'adventure tourism' activities such as rock climbing, caving, horse riding and other activities that are not allowed in official protected areas.
- Amusement parks, such as Rio Lento Water Park in Nahr- El Kalb and Jebjannine Wonderland in West Bekaa.
- Sports and Entertainment, including rafting on the Assi River, caving in Afqa Grotto and Roueiss Cave, and rock climbing in many sites around Lebanon.

Products Related to Agriculture and Food Processing

There is a small number of tourism activities related to agriculture and food processing in rural areas in Lebanon, engaging around 130 farmers and food processors. A Lebanese organization dedicated to promoting Lebanese "culinary traditions, rural heritage and the natural environment" promotes the culinary traditions around Lebanon, including through the well-known weekly farmers markets held in and around Beirut. They have also developed a "food trail" and a series of brochures promoting culinary tourism focused around dishes known in specific areas (for example, kebbeh in Ehden, fish in Batroun, cherries in Hammana, akkoub in Deir el Qamar, kaak bi haleeb in Marjeyoun). In addition, they have coordinated several food festivals under its "Food and Feast" concept, designed in collaboration with local farmers' associations, NGOs and local governments to promote local food and culture, and bring tourists from the cities into these rural areas

Other touristic activities that have been developed by tour operators include olive oil tasting, and fruit picking packages. These are arranged by the tour operators with individual producers. In addition, the different wineries throughout the country offer wine tasting and lunch or dinner packages year round.

Artisanal Food Products

Food products that are produced in the rural areas using traditional techniques are sold to tourists. These products include honey and jams, molasses and other preserves. Often these products are sold unbranded, in small stores in rural areas. These products are also sold in Beirut. Some tourist sites in rural areas, , have worked with producers to develop food products and sell these products at their sites.

Craft Products

There are approximately 1,000 craftsmen in Lebanon who produce traditional crafts that make attractive tourist products. The LIVCD Handicrafts Value Chain Assessment identified a number of these products, including pounded copper, embossed metal, carved wood kitchen items, baskets, textiles including crochet and weaving, pottery, soap, glass blowing and mosaic. To varying degrees, these items are already sold to tourists, although in general craftsmen are not well integrated into the tourism value chain.

Many of the souvenir items that are sold at the traditional touristic sites are actually produced abroad. There is little differentiation in the souvenirs between sites, so visitors tend to see the same type of souvenir at each touristic site.

Level 5: Key Service/Input Providers: These are the key ancillary service providers and input suppliers to the actors in the tourism value chain. They do not directly provide services or products to tourists, but they are important to the operation of businesses in the chain and affect the tourist experience.

Associations and organizations

There are a multitude of organizations that engage the different types of actors in the tourism value chain. These include, but are not limited to:

- **Association of Travel and Tourist Agents in Lebanon (ATTAL).** This association represents the interests of travel agents and tour operators, including both traditional tour operators and eco-tour operators. They currently count 242 members. The stated objectives of the ATTAL are to³:
 - Stimulate and develop the travel and tourism sectors.
 - Create a line of cooperation and communication between members’.
 - Protect interests of Lebanese travel agents.
 - Defend their rights individually and collectively.
 - Improve their professional, social, health and financial standards.
 - Organize conventions, seminars, rehabilitation and familiarization courses.
 - Provide them with professional assistance (surveys, statistics and different consultative advices).
 - Represent their disagreements before courts, arbitrators, or administrative authorities.
 - Establish necessary legislations in favor of ATTAL purposes and the travel trade industry.
 - Operate with related official and private professional authorities to indicate the travel agents’ necessities and to control pricing of travel and tourism services.
 - Introduce Lebanon, represent the travel and tourism agencies in the tourism cycle, organizations and congresses.
 - Help and guide travelers, tourists and emigrants to avoid exploitation & speculations.
 - Execute juridical & international tourism, air, sea, and land transportation rules.

³ <http://www.attalb.com/aboutus.asp>

- **Associations for Nature Reserves, Protected Areas and other Eco-Tourism destinations.**

These associations support planning for conservation and sustainable development, and operations of both conservation activities and tourist services in these areas. They include:

- Association for the Protection of Jabal Moussa (www.jabalmoussa.org)
- Al Shouf Cedar Society (<http://www.shoufcedar.org/>)
- Lebanon Mountain Trail Association (www.lebanontrail.org/)

Marketing service providers

These service providers include marketing specialists, graphic designers and print houses to produce brochures; website designers for websites and social media consultants. They are essential for the marketing of tourist products. Marketing is a well-developed industry in Lebanon, though the cost can be prohibitive for small businesses.

Suppliers to the food and beverage industry and accommodation industry

Lebanon has a well-developed network of suppliers and distributors of products that are essential to running restaurants and hotels, including fresh vegetables and meat and packaged food, disposables such as paper products, dinnerware, furnishings and equipment. These networks are most developed in Beirut and other metropolitan areas, but do extend well into rural areas.

Quality standards and certification

In addition to the quality standards for accommodations and restaurants set by the Ministry of Tourism and audited by Bureau Veritas, there are other standards available from private sector quality management companies. All standards include a list of requirements that the establishment must meet for certification, an audit to ensure that the requirements have been met, and a certificate or seal that the establishment may display publicly to indicate achievement of the standard to customers.

Available certifications in Lebanon include:

- ISO 22000 is the food safety standard developed by the International Organization for Standardization. There are a number of bodies in Lebanon that certify ISO 22000, including Bureau Veritas, TQCS International, SGS Lebanon, ACS Registrars, Peterson Control Unit Lebanon, and BM Trada Certification.
- Lebanon Association for Food Safety “Food Safety Seal of Commitment”, which certifies that the restaurant or food facility has completed a required food safety training course and passed a facility inspection as well as multiple audits.
- Boecker DQS BEST “Kitchen Audit Program” and “Safe Kitchen Monitoring Program”, which provides certification that a restaurant has met certain food safety and hygiene practices.
 - In regards to rural accommodation, the ministry decree 6298/2011 regulates rural guest houses. Furthermore, only Youth hostels are regulated by quality management procedures based on the international Youth hostel regulation; note that youth hostel organizations are dependent of the Ministry of Youth and Sport. There is a need for the implementation of a rural accommodation quality certification scheme

Structure of the Rural Tourism Value Chain

Market Segments (4)		1: Domestic							2: Middle Eastern				3: Lebanese Diaspora		4: European		
Market Sub-Segments (17)	1.1: Schools & Universities	1.2: Young Adventurers	1.3: New Explorers	1.4: Lebanon Expatriates	1.5: Families	1.6: Scouts & Summer Campers	1.7: Elders	2.1: GCC Arabs	2.2: GCC Lebanese Expatriates	2.3: GCC Western Expatriates	2.4: Syrians and Jordanians	3.1: VFRs	3.2: Summer Camps	4.1: Full package Elders	4.2: Explorers	4.3: Independent Backpackers	
Level 1	Information and Promotion	(Inside Lebanon) - Door to door - Websites - e-mails - Magazines	Social Media (Facebook - Mass mail - Website) - Magazines	Social Media - Magazines	Social Media - Magazines	Social Media - Magazines	Internal Communication and mailing	Internal Communication and announcements at church	Packages - Brochures	Packages - Independent channels - Social media - Websites - Magazines - Brochures	Packages - Independent channels - Social Media - Magazines - Tour Operators - Brochures	Independent channels - Brochures	Packages - Independent channels - Social media - Websites - Magazines - Brochures	Independent channels -	Full packages	Packages	Independent channels - Social Media - Guide Books
	Actors	Specialized Clubs Teachers	Specialized Clubs Independent Websites Magazines	Specialized Clubs Independent Websites Magazines	Specialized Clubs Independent Websites Magazines	Specialized Clubs Independent Websites Magazines	Specialized Clubs Scout groups	Prayer groups Priests	Specialized TO Hotels Independent	Specialized Friends Websites Magazines	Specialized Friends Websites Magazines Hotels	Friends Hotels	Specialized Travel Agent Friends Websites Magazines Hotels	Universities Schools Specialized TO Travel Agents MOFA	Travel Agents Specialized TO	Specialized Travel Agents	Websites MOT Magazines Hotels
Level 2	Outbound Operators	Not relevant to this market												Specialized Organizations	Travel Agents	Travel Agents	They do not use this channel
	Actors							Travel Agent	Travel Agent	Travel Agent	Travel Agent	Travel Agent	Travel Agents	Specialized TO Tourism Fares	Specialized TO Tourism Fares		
Level 3	Inbound Operators	Specialized TO Clubs Teachers Independent	Specialized Clubs Independent	Specialized Clubs Independent	Specialized Clubs Independent	Specialized Clubs Independent	Scout groups Specialized TO Clubs Independent	Priests Independent	Specialized Independent Travel Agents	Specialized Clubs Independent Travel Agents	Specialized Clubs Independent Travel Agents	Independent Travel agents	Specialized Clubs Independent Travel Agents	Specialized TO Travel Agents	Specialized Travel Agents Independent	Specialized Travel Agents Independent	Himself
	Actors																
Level 4	Service Providers	Telecommunication - Road network - Transportation - Dining - Attractions - Accommodation - Entertainment - Links with Agriculture - Food Processing - Crafts - Education - Sports - Health							Airport - Port - Border spot - Telecommunication - Road network - Transportation - Dining - Attractions - Accommodation - Entertainment - Links with Agriculture - Food Processing - Crafts - Education - Sports - Health								
Level 5	Key ancillary service providers that affect the tourist experience																
	Key service providers or input suppliers to the tourism actors in level 3 or 4	Associations - Accommodation and Restaurant Suppliers - Marketing Services - Quality Standards and Certification															

4. BUSINESS ENABLING ENVIRONMENT FACTORS

4.1 KEY CONTEXTUAL FACTORS THAT AFFECT THE VOLUME OF BUSINESS AND PROFITABILITY OF TOURIST SECTOR ACTORS

Actors in Lebanon's tourist sector are affected by the general business environment, as well as factors specific to the provision of tourist products and services. In the general business environment, Lebanese businesses face a range of problems; the World Economic Forum's Arab World Competitiveness Review 2010 ranks the top six problems as inadequate supply of infrastructure, inefficient government bureaucracy, government instability, corruption, policy instability, and access to financing. Clearly these factors affect tourism-related businesses in terms of volume of business and profitability of the business. Government instability can impact the number of tourist arrivals; this factor has been especially significant in Lebanon as discussed in Section 1 of this report. A lack of infrastructure can also depress tourist demand; for example, the lack of 24 hour electricity may keep away less adventurous tourists. The profitability of a business can be significantly affected by inefficient government bureaucracy and corruption, which can impede starting up or operating a business, and policy instability as well as access to finance constrains investment.

Looking more specifically to factors affecting the tourist sector, the WEF Travel and Tourism Competitiveness Report Index provides a rank and score on a scale of 1-7 for three main elements that indicate Travel and Tourism Competitiveness in a country. In 2011, Lebanon was ranked 70th among 139 countries for tourism competitiveness, with specific rankings in the three main categories: Travel and Tourism Regulatory Framework, Travel and Tourism Business Environment and Infrastructure, and Travel and Tourism Human, Cultural and Natural Resources as follows:

1. The Travel and Tourism Regulatory Framework

Countries in this category, includes sub-categories of policy rules and regulations, environmental sustainability, safety and security, health and hygiene, and prioritization of travel and tourism in the country.

In terms of **policy rules and regulations**, here are marked differences between regulation of the traditional tourism sector and rural tourism in Lebanon, with traditional tourism receiving more oversight from the government. For example, tour guides at the archaeological sites under the purview of the Ministry of Tourism are subject to licensing, which regulates the quality of the guides and provides some guarantee of the tourist's experience. In contrast, there is no regulation of guides at nature reserves or other eco-destinations, which has resulted in uneven quality of the tourist experience. On another note, eco-tour operators are regulated under the same rules as traditional travel agencies, including stringent operating requirements such as a minimum number of employees and size of the business office. Because eco-tour operators are much smaller than most travel agencies, these regulations are burdensome and as a result many operators are not licensed and instead operate as a club or association. Thus a large number of operators in the eco-tourism sector are unregulated, which again leads to unevenness in the quality of products offered and the tourist experience.

Lebanon is at a notable competitive disadvantage in **environmental sustainability**, ranking 125 out of 139 countries in this sub-category, with a score of 3.9. Lebanon is ranked 139 out of 139 countries for both stringency of environmental regulation and enforcement of environmental regulation, and ranked

124 out of 139 countries in sustainability of T&T industry development. This has obvious negative implications for the rural tourism sector, which depends on the natural resource base.

Lebanon is also at a competitive disadvantage in the **Safety and Security** sub-category, scoring 3.8 and ranking 123 out of 139 countries. This is related to the potential for terrorism, unreliability police services and high rates of road accidents. As noted in Section 1 of this report, the security situation in Lebanon and the region has a significant impact on the volume of tourist arrivals, and the contribution of tourism to GDP.

In terms of **Prioritization of Travel & Tourism**, Lebanon has a relatively high rank at 39 out of 139 countries, and score of 4.9. Lebanon ranks well on government prioritization of the Travel & Tourism industry; however, it is ranked 113 out of 139 on the effectiveness of marketing and branding. The budget of the Ministry of Tourism is low, and marketing of Lebanese tourism at the government level has been restricted to participation in trade shows in the Gulf and abroad. This visibility showcases traditional tourism such as the main archeological landmarks, five star hotels and city life, and more recently medical tourism. Although the Ministry has been working on ecotourism lately, the full potential of the sector as an income generator for Lebanon is has not been sufficiently exploited and the sector is not showcased in the right channels. A campaign at the international level with ads for Lebanon in main capitals of the West echoed by pages related to Lebanon in catalogues of big international tourism package distributors is currently not feasible with the limited budget available.

2. The Travel and Tourism Business Environment and Infrastructure

Lebanon scored 3.9 and ranked 63 out of 139 countries in this category, which includes the sub-categories of air transport and infrastructure, ground transportation infrastructure, tourism infrastructure, ICT infrastructure, and price competitiveness in the Travel and Tourism industry. Lebanon is ranked highly in terms of the quality of air transport infrastructure (36 of 139) and the number of operating airlines and the international air transport network (41 of 139). Lebanon is at a disadvantage in term of airport density (116 of 139 countries), with only one international airport, in Beirut, and no domestic airport network, due to the small size of the country.

3. The Travel and Tourism Human, Cultural, and Natural Resources

Lebanon scored 3.8 and ranked 69 out of 139 countries in this category, which includes the sub-categories of human resources (education and training, and availability of qualified labor), affinity for travel and tourism, natural resources and cultural resources.

Lebanon ranks first out of 139 countries on affinity for travel and tourism, with a score of 6.8; the country's government and residents are quite open to foreign visitors. However, Lebanon ranks much lower in terms of natural heritage (ranking last out of 139 countries, with a particularly low rank in quality of the natural environment) and cultural heritage (ranking 98 out of 139 countries). This is gloomy news for the rural tourism sector, which is largely based around natural and cultural heritage.

Competitors and substitutes:

Jordan, a Regional Destination with Increasing Competitiveness

Jordan benefits from a relatively safer environment than that of Lebanon and great efforts have been made by the country to feature itself worldwide as a tourist destination. The Jordanian board is working on diversifying markets, addressing the negative effect of seasonality, and on featuring Jordan as an ecotourism destination. Their tourism revenues for the first 11 months of 2010 rose by 19.3 percent when compared with the same period of 2009. After Petra was named one of the new Seven Wonders of the World in 2007, the country saw a rise of 68 percent for European tourists and a 97 percent for US tourists in 2008 as compared to 2007. The Jordanian efforts in developing tourism have made rural destinations in Jordan the main competitor of Lebanon, since both countries target similar market segments – with higher purchasing power than potential tourists to Egypt or Syria (pre-crisis).

Week-ends in Turkey and Jordan, a substitute for domestic rural tourism

Jordan and Turkey have now become main destinations for Lebanese wishing to go for short tourist trips, constituting one of the main substitutes for domestic rural tourism, especially after changes in Visa regulation between the three countries made travel more convenient. Lebanon has been able to attract Turkish and Jordanian tourist as well, however rural areas have not yet benefited from this influx.

The Jordanian experience shows the importance of public policies for the development of tourism in general and rural tourism in particular. Lebanon rural tourism has been able to develop thanks to private initiatives and donor support; nevertheless, public support policies, including regulation and marketing are necessary for the sector's competitiveness.

4.2 PUBLIC SUPPORT PROGRAMS AND DONOR PROJECTS

Investment Development Authority for Lebanon (IDAL)

IDAL promotes investment in Lebanon, and identifies tourism as an attractive sector for investment. However, of the 13 tourism projects mediated by IDAL from 2003 – 2011, only one is outside of Beirut and that one is found on the coast, in Jiyeh.

The Lebanese government considers tourism to be a promising sector, and supports projects in the tourism sector through IDAL. Since 2003, these projects have been mostly hotel and resort development in Beirut (see Table 7).

IDAL continues to promote opportunities in the tourism sector, specifically identifying opportunities in three- and four-star hotels in the north and south regions around touristic attractions, which would support rural tourism by increasing access to touristic sites in rural areas. IDAL is also promoting Lebanon as a destination for medical tourism, and business and convention centers.

Municipalities

Local government at the municipality level has proven to be important to the development of rural tourism in Lebanon. Some municipalities have placed a specific focus on rural tourism as a driver of economic growth, and have made strides in improving strategic planning, infrastructure, and other elements necessary to improve rural tourism.

Below is a summary of the work done by some of the most active municipalities and a summary of the work achieved or the work in progress.

The Jezzine Union of Municipalities is currently implementing a strategy aimed at integrated sustainable development of the region over the next few years. The strategy, which is being developed and implemented with support from the European Union, gives priority to the protection of cultural and natural heritage and encompasses projects designed to improve infrastructure, urban planning, health care, social development, education and agriculture.

With specific respect to tourism, the municipality is developing a comprehensive touristic map of the region (implemented by Beyond Beirut), which includes specific improves such as rehabilitation of hiking trails; establishment of a tourism information office; introduction of a cohesive marketing tourism plan; training of touristic guides, plan for the improving food and beverage industry (services, prices, and quality);rehabilitation of traditional stair steps in several villages, assessment and study of archaeological ruins, restoration of Jezzine Spring Area and establishment of a cultural museum; rehabilitation and promotion of the Roman sarcophagi; restoration of historical mills, establishment of an adventure park; restarting the pumping of Jezzine waterfall, construction of a panoramic balcony; increase in number of bed & breakfast lodges and construction of eco-lodges; establishment of bikers' lodge and diner; initiation of a "natural reserve zone",

The strategy also contains provisions for environmental preservation, (zero plastic bag project, implementation of a fire prevention and intervention plan, implementation of a monitoring plan for stone cutting and quarrying activities, reforestation projects and establishment of a forest management plan, renewable energy for street lighting, establishment of an integrated waste management plan). Additionally the strategy contains elements to support handicrafts, specifically Jezzine cutlery museum, soap and wax production plants, as well as supporting industry through trainings on chocolate making and apple derived products manufacturing, development of a winery and dairy products facility, support for branding, packaging and marketing of agriculture products, and support to SMEs through microcredit facilities.

Zgharta-Ehden municipality

The municipality is headed by an active president who is currently working on a feasibility study for creating ecotourism in the region. The municipality intends to develop its tourism assets and is currently in the last phases of the development of a brochure establishing Zgharta-Ehden both as a destination and as a hub for visiting the region. The brochure is implemented by Beyond Beirut. **Hammana Municipality**

The development committee of the Hammana Municipality has been very active at developing tourism in the area with an ecotourism development initiative, a revival of the “Cherry Day” festival, the establishment of the “Laughter Festival” and the implementation of village activities on specific occasions such as Christmas.

Ehmej Municipality

The Ehmej municipality has been working over the past few years on developing ecotourism in the region with funds from USAID. Hiking trails were reopened, adventure tourism was developed (rock climbing, skiing related activities, an information center was created, art exhibitions were implemented, a hospitality house was opened offering a bed and breakfast, camping and kids’ activities were developed and a festival and a village fair were set on track.

The Nature Conservation Center at the American University of Beirut implemented a project entitled “Baldati Bi’ati (translation: my village, my environment) in 2011 and 2012 that established, in collaboration with local communities, a database of features related to the environment, the nature of water resources, pollution and activities that can endanger the environment, sustainability of life in villages, ecotourism activities that can be implemented in villages and cultural and social landmarks. In addition to the data base, this project, meant to recognize municipalities that make efforts towards nature conservation, has identified municipalities headed by proactive presidents who are aware of the importance of sustainability at the environmental and social levels.

4.2.1 DONOR SUPPORT

Donors have supported rural tourism as a driver of sustainable economic growth in rural areas. Projects have focused on development of information and communication to strengthen marketing and building demand; developing and improving the quality of infrastructure and services; and strategic planning with municipalities and private sector actors. The major donor-funded projects of the past few years are noted below:

Expanding Economic Opportunities in Lebanon, 2002 – 2007, USAID with SRI and INMA

This project created a new promotional image for Lebanon that would encourage tourists to venture outside of Beirut. Achievements include:

- Launch of a new website called Destinationlebanon.com
- GIS based mapping system available at Lebanonmaps.net
- Informational brochures and marketing material (Promenade - Nature Reserves - Hidden Lebanon, Lebanese craftsmen, and archeological sites maps)
- Creation of the Discover Lebanon Tours Brand Package with tour operators, which became a permanent section of Lebanon Wings MEA magazine
- Road signs
- Promotion at the Garden Show, HORECA, Souq el-Tayeb, Ideal Home show
- Refurbishment of Mseylha Fort
- Olive Oil promotion
- Food labeling for better promotion
- Participation in trade shows
- IT support

Economic Support Project, 2002, USAID with Mercy Corps

This project in South Lebanon provided rehabilitation of agriculture and tourism support in Hasbayya and Marjaayoun regions in South Lebanon. Achievements include:

- Marketing campaign “Change Direction, Go South:
- Building an 18 bungalow hotel in el-Khiyam
- Restoration of a British built WWII hospital into a museum
- Restoration of the Roman temple of el-Hebbariyyeh
- Restoration of the Ottoman caravanserail Souq el-Khan in Hasbayya
- Restoration of the Watermills of Shebaa and hiking trails

- Creation of protected area Hima in Ebel Es-Saqi
- IT support
- Road signs
- Participation in trade shows

Lebanon Mountain Trail Project, 2005 – 2008, USAID with ECODIT

This project supported the installation of a hiking trail in Mt. Lebanon and associated economic development in rural villages along the terrain. Achievements include:

- Establishment of 440km of hiking trail
- Creation and publishing of maps, guidebook, and brochures
- Creation of the LMT Association
- Support for improvement and marketing of guesthouses
- Training for local guides
- Creation of the LMT Association magazine
- Promotion including a yearly event ‘Thru Walk’ and trade shows

DHIAFEE Project, 2006 – 2008, USAID with ANERA-Kafaat

This project supported the creation of alternative tourism lodging facilities in rural areas in Lebanon. Achievements include:

- Network of more than 30 accommodation facilities
- Development of marketing brochures and a guidebook
- Development of quality standards and technical assistance to help the lodging facilities meet requirements
- Advocated for a new ministerial decree for the definition and control of guesthouses (see Annex 1)

Lebanon Business Linkages Initiative, 2010-2011, USAID with FHI360

This project addressed economic growth and poverty reduction in Lebanon by working directly with the business sector facilitating technical assistance, and providing guidance on marketing and access to finance in the agribusiness and tourism sectors. Achievements included the launch of the Beyond Beirut NGO, with “A mission to encourage the development of experiential tourism beyond the city limits of Beirut as a means for sustainable economic development in rural Lebanon.”

Empowering Municipalities through Local Economic Development (EMLED), 2008 – 2011, USAID with RI-IRG

This project helped local communities, municipalities, and organizations to strengthen development projects, including ecotourism in rural areas.

The EU has also provided funding to support Lebanon’s rural tourism sector. Projects include direct support to tourist infrastructure, including two museums:

- 1) 'Le musée de la vie rurale', in Terbol – Beqaa, by La Fondation Nationale du Patrimoine. A traditional mud brick house turned into a museum demonstrating rural life in the Bekaa.
- 2) Le 'musée de la mélasse', in Ras Baalbak, by La Fondation Nationale du Patrimoine. A traditional grapes molasses press house transformed into a museum.

The EU, working with Mada (a Lebanese NGO dedicated to community-based development) also supported the creation of a National Park in Aakkar – Donniyyeh. In 2006, Mada launched a set of activities over a pilot area of 220 km² covering a biodiversity assessment and socio-economic and ecotourism projects. The creation of a database which includes biological, social, and economic aspects aims at developing management guidelines for the National Natural Park which will contribute to the promotion of socio-economic development and the conservation of natural resources. It will also favor and strengthen the application of environmental management principles.

5. DYNAMIC TRENDS

The main dynamic trends in the tourism sector, and specifically those relevant to the rural tourism sector, are noted below:

5.1. CONTINUED GROWTH WITH INTERMITTENT BOOMS AND BUSTS

Lebanon's tourism industry witnesses continuous growth despite the crisis years.

As noted above, tourism arrivals in Lebanon are correlated with political and security crises.

Yet, despite these issues the general trend in the past 20 years has been increasing. The key challenge for Lebanon is to capitalize on its tourism assets in order to lessen the downturns while maintaining the upward trend during peaceful times.

5.2. INCREASED INVESTMENT IN SPECIALTY TRAVEL IN THE RURAL TOURISM SECTOR

As highlighted in the Lebanon Business Linkages Initiative (LBLI) Tourism Assessment and Strategic Recommendations from December 4th 2008, Lebanon offers more than 20 different categories of specialty travel tourism, including Adventure and Sports, Archaeology, Arts, Backpacking, Camping, Corporate, Culinary, Disabled, Ecotourism, Educational, Family, Festivals and Holidays, Photography, Pilgrimage, Science, Scuba Diving, Singles, Spas, Students, Volunteering, Weddings and Honeymoon, and Working Holidays.

Tourists are increasingly demanding products in this specialty tourism category, and the demand has been met by an increase in the number of small tour operating businesses for specialty tourism. These tour operators mainly deal with ecotourism, adventure and sports, and religious tourism. The clientele of such tour operators are mainly single young local tourists with relatively high income, schools, and some corporations.

One type of specialty tourism in rural areas that deserves attention as a potential for Lebanon is sustainable tourism including the category of ecotourism. This includes the development of nature reserves. Additionally, there has been an increase in the availability of accommodation targeted towards

tourists visiting these types of sites, including small capacity guesthouses and bed and breakfasts to complement the existing hotels (which are small in number compared to Beirut and the coastal areas).

Sustainable tourism addresses three major pillars: the environment, the economy, and society. Sustainable Tourism can be classified as follows:

Solidarity Tourism: Solidarity tourism is community-based tourism, defined by the control of the local host population in deciding the construct of the tourism activity, from how tourists are received in the community to how the income generated is distributed and used. Solidarity tourism incorporates the principle of Corporate Social Responsibility (CSR) by default, whereby 5 percent or more of the returns are invested in projects that benefit the communities involved in tourism activities.

Experiential Tourism. Experiential tourism is tourism which engages the tourist at a high level of active involvement in the experience, with a focus on experiencing nature and culture. Experiential tourism includes nature-based tourism, adventure tourism, and eco-tourism.

SWOT ANALYSIS:

Market	Strengths	Weaknesses	Opportunities	Threats
Domestic Market	Not as sensitive to the political situation in the country. Motorized or familiar with the country's transportation system	Addresses only locals with relatively high income and a cultural background that attracts them to this form of tourism. Tailoring of suitable trips imposes a big variety of products.	School trips can represent a high potential.	Political situation can affect volume
Lebanese Diaspora	Not as sensitive to the political situation in the country. Eager to reconnect with their roots	Length of trip for American bi-nationals is longer than that of European tourists and packages should be adapted.	A niche market can be developed if needs are properly addressed	Political situation can affect volume.
European Market	Rural tourism is part of European culture	Quality of services should meet expectations.	Wide range of potentials are available in Lebanon to satisfy demand	Political situation will lower volume drastically.
Middle Eastern Market	Their love to Lebanon. Big consumers and spenders	Difficult to attract to rural tourism unless via festivals channels.	Same culture, same language. Geographical distance.	Competition from neighboring countries such as Jordan or Turkey.

6. VALUE CHAIN OPPORTUNITIES FOR RURAL TOURISM

OPPORTUNITY 1: IMPROVE SUPPLY OF PRODUCTS IN THE RURAL TOURISM SECTOR TO CAPTURE A LARGER SHARE OF THE DOMESTIC AND DIASPORA TOURIST MARKET SEGMENTS – PEOPLE WHO ARE ALREADY FAMILIAR WITH THE BROAD LINES OF RURAL LEBANON AND THAT PRESENT A VALUE ADDED AS COMPARED TO THE “KNOWN LEBANON.”

The political situation in Syria is affecting Lebanon, creating a climate of instability and making it difficult for Lebanon to compete with regional tourism offerings at the international level. There is however a good short-term opportunity for increasing output in rural tourism that is based on a market composed of local tourists (families, young adults, corporate personnel and students) and Lebanese diaspora tourists who have an idea of what is going on in the country and can accommodate themselves. These tourists are less likely to be discouraged from tourism by regional and even internal conflict, and therefore provide a relatively dependable market. These tourists are already familiar with the broad lines of rural Lebanon, and many may have demonstrated an interest in rural tourism offerings over the past few years. They have an interest in rural tourism products and demand a high level of quality, and so focusing on upgrading the rural tourism sector with this market in mind is a good step towards also attracting increased tourism from foreign tourists, especially in the European market segments, in the long-term.

There is a multitude of opportunities in developing the quality of products and linking existing and new product providers into networks to increase the overall value in the rural tourism sector.

Potential of attractions that already exist can be more fully developed

Lebanon has enormous potential for rural tourism because of its history, its diversified ethnic population, its geographic diversity, and its climate. Many cultural and historical landmarks exist in the countryside that could be developed into tourism landmarks. An example is the Fakhreddine cave in Jezzine. The cave is inaccessible to the public although it is the symbol of the struggle of a Lebanese nationalist of the early hours of Lebanon. Proper restoration of such places, with easy access and adequate amenities could represent a boost for tourism in the Jezzine region. A diversity of these sites exists in rural areas all over Lebanon.

Another example is the increasingly popular protected areas (nature and biosphere reserves). These do not yet have a well-developed unique identity or specific products with activities at each reserve.

Potential Tourism Product Providers in Rural areas can be developed and connected to rural tourism network

The potential to increase value in the rural tourism chain through products provided by craftsmen and agribusinesses is limited by a lack of product development and lack of integration of these actors into rural tourism networks. Few rural areas have unique products associated with the area. Many souvenirs are not made in Lebanon. Those that are produced here are low quality, and the producers are not well linked to the rural tourism network so production is on a small scale. There exist farmers and food processors in different areas who could link to rural tourism to provide agrotourism products, but these products are not well developed nor linked to tour operators or other promotional agents.

Constraints

There is an existing demand for rural tourism products among the domestic and diaspora market, however this demand is constrained by a lack of information and marketing. On the supply side, a lack of product development answering the needs of the local tourist market segments and a lack of quality in the products that do exist also constrain expansion of this demand. Weak linkages between actors in the rural tourism value chain constrain the sector's overall ability to solve these problems.

1) Lack of Information and Marketing

Lack of tourist information centers in the regions

Only a few municipalities with sufficient resources are realizing the importance of having information centers to direct tourists to main attractions in the locality. Among municipalities that have implemented such centers or are working on this issue are some of the municipalities that have benefited from USAID projects noted earlier in the report.

Lack of availability of printed promotional material

Printed promotional material on all areas of Lebanon is solely available at the Ministry of Tourism premises in Beirut. The brochures are outdated and specific to archeological landmarks. A set of exhaustive brochures, harboring an impressive amount of information on all Lebanese villages was developed by INMA with SRI International in 2005. However, the brochures are not user friendly and are being kept in the warehouses of the Ministry of Tourism. Some municipalities have developed brochures for their area, mainly those having benefited from USAID funds such as Ehmej and Akkar. Beyond Beirut is currently working with two municipalities to develop a tourist map (Jezzine Union of Municipalities) and a brochure (Zgharta –Ehden).

No adequate transportation system across the country

No information on transportation is made readily available to tourists who do not speak Arabic. Two main bus stations exist in Beirut, "Charles Helou" and "Cola" with buses bound for main towns in the country. Departure is not timed or scheduled but is directly linked to the filling of the bus to full capacity. There are no itineraries that can be decided upon in advance. Tourists arriving in main towns will repeat the process with smaller vans bound to neighboring localities. As the destination becomes more specific and farther from Beirut, transportation becomes scarcer. Such an "adventure" might attract proactive European backpackers, but it can become a nightmare for others. Local tourists are not ready to go through this process and expect a minimum of comfort to move to a specific destination. Most tour operators offer transportation in specially rented buses for their tours; yet for local tourists who want to discover and experience rural Lebanon on their own, the lack of a personal car is definitely a hindrance.

2) Lack of and Inconsistent Service Quality

Lack of training and awareness of level of service quality demanded

Seasonality of tourism leads to seasonality of employment. The volume of tourism in Lebanon is directly affected by the season of the year with a peak during the three summer months that can represent more than double that of the rest of the year. During peak periods, establishments in the tourism sector will hire more employees than during low periods of demand. During peak periods, workers hired are not necessarily trained for the tasks that are requested from them and this results in poor service quality. At the level of agrotourism, farmers and producers are still new to the idea of receiving tourists on their premises and are not always offering services at the level of that tourists expect; this can result in lowering tourism volumes over the long term.

Uncoordinated quality control for services

There are a number of organizations providing on quality control schemes for tourism services – from the classification system for accommodations and restaurants by the Ministry of Tourism with Bureau Veritas, as well as private schemes as described in Section 4.1. Not all of these schemes are well respected, with consumers suspicious of the stringency of private certification schemes. Additionally, these quality management systems are not well adapted to the rural tourism sector. There are no committees or associations working on quality labeling specifically for eco-tour operators, alternative lodgings, and eco-destinations.

Lack of certified guides

Tourism guides for archaeological and other traditional sites are certified by the Ministry of Tourism. However, there is no authority to regulate or certify guides for ecotourism or other rural tourism sites. Developing such a structure would grant rural tourism credibility and quality that is lacking at the moment and would positively influence tourism volume in the long term.

3) Lack of Product Development

Lack of destination development initiatives

If some municipalities are aware of the importance of diversifying the products and the services they offer, the effort is often restricted to a municipality that is active because of the personality of its head or president. With no strategy being implemented at the national level, the lack of cooperation between municipalities in given areas is detrimental to tourism volume.

Seasonality constrains investment in facilities and employment

The case of winter resorts and nature reserves is very representative of the problems arising from the seasonality of tourism, where during long periods within a year no activities are possible and service providers have difficulties in covering their operating costs. Employment is restricted during the off-season; for example, local guides on the LMT wait for the spring season to regain income with hiking activities.

4) Weak Linkages between actors in the value chain

Lack of collaboration between inbound travel agents and local tour operators

Inbound travel agents tend to focus on products based around traditional Lebanese destinations (including Baalbek, Saida, Jbeil-Byblos, Tyre-Sur, and Tripoli). These agents are rarely interested to collaborate with specialty tour operators to offer rural tourism related tours.

Lack of collaboration between local tourism service providers within regions

The concept of cooperation or collaboration amongst competitor is not well accepted in rural areas, with specific service providers unable to see the importance of collaborating and differentiating their services from each other to achieve greater returns from tourism. Sometimes, even collaboration between different service providers is perceived negatively.

OPPORTUNITY 2: BUILD DEMAND IN THE MIDDLE EAST SEGMENT, ESPECIALLY SAUDIS AND KUWAITIS, FOR RURAL TOURISM ACTIVITIES BY ADAPTING PRODUCTS

THAT FIT THEIR BEHAVIORISTIC ASPECT.

Saudi Arabians are the greatest spenders in Lebanon's travel and tourism industry, followed by Kuwaitis. These two groups tend to spend extended holidays in Lebanon, some of them owning properties in the mountains or cities. In recent years, the country's tourism infrastructure has been geared towards attracting and retaining Gulf tourists in general, with luxury hotels, shopping centers, restaurants and other operators all attempting to lure them in. In order to create demand in this sector for rural tourism activities, thus shifting some of their spending to the rural tourism sector, tourism products must be adapted and appropriate marketing undertaken to target this segment.

To take advantage of this opportunity, the sector needs a diversified range of products in rural areas that will appeal to Saudis and Kuwaitis who are renting houses in rural areas for a long stay in summer. Alternative activities that could attract this segment and keep some of their spending in the rural areas include amusement and adventure activities for the younger family members, good restaurants for the eldest, and nighttime entertainment for families such as rural festivals with an emphasis on food and entertainment.

Constraints

Existing rural tourism initiatives have focused on the high income, educated domestic market, Lebanese diaspora, and European tourist segments, because these segments have a behavioristic profile that includes demand for discovery of natural and cultural heritage. The Middle Eastern tourist segment has a different taste in travelling, and thus constitute a very different market that requires specific targeting as described above. At this point, the existing actors have not explored the opportunity, preferring to expend their resources to invest in the aforementioned segments that are perceived as a safer market for the products offered. Thus, little is known about the potential of the Middle Eastern tourist segment in the rural tourism sector.

OPPORTUNITY 3: PROTECT NATURAL AND CULTURAL BASE OF RURAL TOURISM BY RAISING AWARENESS AND ENGAGING THE LOCAL COMMUNITY.

Another important supply side opportunity lies in engaging the local communities. Lebanon's rural areas offer a variety of beautiful geographic characteristics and a diverse population with rich histories and cultural heritage, providing the foundation for a multiplicity of tourism offerings with great potential for economic benefit to residents. However, without sufficient economic returns to individuals to incentivize preservation of these elements, these areas are at risk of losing their natural and cultural resources.

The nature reserves that have appeared in the country over the past years have a positive impact on ecotourism. The Shouf Biosphere provides a model of how to maintain natural beauty through ensuring that the surrounding community has a financial stake in its preservation. Ensuring that communities surrounding a reserve or other landmark of natural beauty benefit from that natural asset is essential to the sustainability of that natural asset. However, many other resources underpinning rural tourism have seen a different story. This has been seen on the Lebanon Mountain Trail. Because of the common nature of the resource, it has proven difficult to capture the economic benefit for the communities through which the LMT runs. Entrance to the trail cannot be physically restricted, so a user fee is difficult to enforce. Some residents make money as tour guides, or as operators or employees of accommodations, restaurants and souvenir stands, or as producers of local goods sold in villages along the LMT. However economic

benefit is not captured by the larger community, so there is no incentive to protect the LMT and in some cases communities prioritize other developments such as agricultural roads that run through the LMT.

Constraints

Lack of concern or awareness at the government and the community level regarding the importance of the preservation of the environment to ensure sustainability of tourism

In rural Lebanon in general, there is a lack of planning related to projects and construction that appear in villages, whether related to tourism or other sectors. There are no guidelines or specifications imposed by municipalities to preserve the appearance of villages. This is how ugly constructions appeared in the vicinity of such landmarks such as the Qadisha Valley, endangering its maintenance on the list of UNESCO world heritage landmarks. This issue also affects the LMT; with no public directive to protect the trail, in some cases other development priorities such as agricultural roads take precedence.

LIVCD intervention in the value chain has high potential of success. Nevertheless, LIVCD will have to tackle the value chain constraints using a holistic approach and it should fully acknowledge the multi-dimensionality of the rural tourism value chain. LIVCD intervention should work at the national level , including institutional development and national promotion, on the local dimension through actors cooperation and destination creation, while supporting the several sub-sectors of rural tourism, i.e. guide, accommodation businesses, restaurants, local guides, leisure business, etc.

The security situation in the country will be one of the main constraints for LIVCD intervention. The LIVCD team should develop a flexible strategy in which priority is given to the domestic tourist segment, stakeholders planning, and capacity building – with a focus on human resources – during time of instability, and focus on Foreign and GCC tourist and on large investment when the political situation returns to normal.

The rural tourism value chain has witnessed significant growth between 2006 and 2010, and large projects and investments have been made (LMT, DIAFHEE programs, etc). Currently, the sector is facing some difficulties because of the stability situation and the decrease in foreign tourist flow. Nevertheless, this has neither stopped the development of successful initiatives such as “la Maison de la Foret” and Ehden resorts, nor hindered municipalities, local NGOs, MSMEs and investors in looking at the sector as a viable socio-economic option for rural areas. Against that background, LIVCD intervention is likely to leverage additional funds and investment in the rural tourism value chain.

7. UPGRADING STRATEGY FOR RURAL TOURISM

AXIS 1: EMPOWER STAKEHOLDERS IN THE RURAL TOURISM VALUE CHAIN TO ADVOCATE FOR THE SECTOR AT THE NATIONAL LEVEL.

The rural tourism sector currently suffers from a lack of coordination and regulation. However, many of the stakeholders in the sector are motivated and can benefit from empowerment to advocate for self-regulation, as well as regulation by the government in areas such as licensing of guides and regulation of specialty tour operators. LIVCD can facilitate progress in this area through:

- Support to actors in the value chain to advocate for development, adoption and implementation of a Rural Tourism Strategy. This has not yet been initiated at the national level, and would require engagement of stakeholders in the strategic planning process. LIVCD could play an important

facilitation role in bringing stakeholders together, and providing technical assistance to facilitate implementation of the strategy. At the national level, the strategy should address information and promotion. For example, elements may include:

- Marketing strategy for rural Lebanon, to increase promotion of rural tourism specifically, both internationally and domestically. This would increase awareness of rural tourism products and build demand.
- Promote the Charter for Responsible Tourism in Lebanon: Such a charter lays out the ethics of responsible tourism to create a standard that is known to all participants in the rural tourism sector. This helps protect the image of quality and adds value to the rural tourism sector. A draft charter was developed in 2008 and proposed to the Ministry of Tourism but has not yet been implemented. LIVCD can advocate for adoption of this strategy by the Ministry, and provide facilitation for implementation including developing the action plan. A copy of the draft charter is included in Annex 1.
- Definition of a certification scheme for guides in eco-tourism destinations.
- Support the public bus routes and timing and signage and print leaflets to facilitate usage of the public transportation system by tourists who do not speak Arabic.

AXIS 2: WORK WITH REGIONAL LEVEL ACTORS (MUNICIPALITIES/REGIONAL TOURISM DEVELOPMENT BOARDS)

The municipal level has proven to be a logical locus of coordination of rural tourism networks. Some municipalities have achieved success in strategic planning to direct the development of local resources for rural tourism. Municipalities can directly work on improving information and promotion as well as service and product quality to increase value from rural tourism. The municipality can also coordinate tourism products that capitalize on local flavor – for example, creating festivals based around local cultural heritage.

Potential activities with the various municipalities include:

Facilitate development of municipal rural tourism strategies at the level of municipality groups in close coordination with the Beyond Beirut Association. This includes facilitation of bringing together stakeholders to develop a vision for rural tourism and action plan. Selected main rural areas to target are: Qobayyet – Sir ed-Donniyyeh - Ehden – Tannourine – Aaqoura – Baskinta – Aain Zhalta – Jezzine – Nabatiyyeh – Derdghayya – Tibnine – Marjaayoun – Hasbayya – Rashayya – Aanjar – el-Fekha.

While the specific elements of the strategy must come from the stakeholders, potential elements of such a strategy could include:

- Marketing strategy that emphasizes the locality’s unique identity and tourism offerings. Installation of visitor centers to improve information and marketing of rural tourism products.
- Assist the municipalities to coordinate stakeholders to develop rural tourism routes that exploit local resources and cultural heritage, including those related to:
 - Food and gastronomy, such as a wine route, olive route, apple route, and citrus route in the relevant locations.
 - Culture: Crusaders castle route; Roman routes between the Mediterranean Sea and the Bekaa Valley (Byblos to Baalbek via Aaqoura – Yammouneh); A literary route; A route related to ethnicities of Lebanon (Armenians in Aanjar – Chiit in the South – Druzes in Hasbayya and the Shouf – Maronites in North Lebanon – Orthodox in Koura region)

- Religious and pilgrimage routes; 10 routes in total, including Christian (St Charbel) and Muslim routes (Sit Zainab in Baalbek) and mixed routes (the coast between Beirut and Tyre with Prophet Jonas, Prophet Haroun, Prophet Oumran, Al Khodre, and Chamaa)
- Cycling routes: High mountain routes such as Bsharry to Faqra via Tannourine – Aaqoura and Afqa) and in the Beqaa Zahle to Hermel, and Aanjar to Chebaa.
- Support development of locally based tourism products, including organizing annual events around a particular trait of the locality (e.g., a specific dish, crop, or element of cultural heritage). There is a wide range of potential sustainable tourism products that could be tailored to the unique identity of each municipality, to meet demand of the local and diaspora market. Specific attention should be paid to developing products that attract tourists in all seasons, to counter the effects of seasonality on actors whose businesses and incomes suffer in the off-season. In addition, specific attention should be paid to products tailored specifically for the Middle Eastern markets.

Some examples include:

- Culinary-based products: Mouneh (provision-making) in autumn; potential products include picking of olives, sessions on olive oil tasting, a visit of the press and a local chef demonstration of the preparation of a dish based on olive oil. Regional products made available for sale.
- Educational-based products: Promote regional themes such as architecture, history, art, and religion. Interaction with locals encouraged.
- Winter-based products: Decentralize the ski offer from Ouyoun es-Simane to other regions where the infrastructure already exists, such as the Cedars, Laqlouq, Qanat Bakish, Zaarour; Cheaper and low cost accommodation facilities such as youth hostels are needed to respond to the growing market of snowshoeing and cross country skiing.
- Accommodation products: Support youth hostels to meet demand from schools and universities.
- Adventure parks in Mount Lebanon and develop new adventure parks in South Lebanon and in Bekaa regions.
- Install new museums in rural areas: Tree museum or Cedar museum; Olive oil press house museum; Feirouz museum; Wadih es-Safi museum.
- Preserve typical architecture in typical villages: Deir el-Qamar, Douma, Beit Chebab, Enfe, Batroun, Saida, Tripoli, Beino, Ghazir.
- Support development of a “Drives in Lebanon” product in Middle slopes of Mount Lebanon, and other parts of the country, such as the axes between Mount Lebanon and the Bekaa Valley (ex: Tarchiche / Zahle road or Afqa / Yammouneh road or Maasser esh-Shouf / Kefrayya road or Cedars / Aainata road or Sir ed-Donniyyeh / Hermel road or Qbayyet – Hermel road. Develop associated informational products (e.g., paper-based, CD, or smartphone application). While driving on these routes the visitor is encouraged to use the services signposted on the way, which could include tourist sites, restaurants and accommodations, supporting directly the economic sector the rural areas.
- Promote initiatives to raise awareness among local communities about the importance of preserving natural and cultural heritage as a foundation for rural tourism. Facilitate participatory planning and identify mechanism to create incentives in local communities for protection of these resources.

AXIS 3: WORK WITH NGOS AND ASSOCIATIONS AND ACTORS TO UPGRADE SPECIFIC PRODUCTS IN THE RURAL TOURISM VALUE CHAIN.

Strategic planning at the municipality level will identify specific NGOs, associations and individual actors such as accommodation providers, tourism activity providers (including farmers, food processors and craftsmen), with whom LIVCD can work to provide assistance to upgrade product quality and promotion, and link these providers into the rural tourism network of tour operators and municipalities engaged in tourism promotion. Some examples of potential interventions include:

- Provide a training program to interested farmers to develop tourism activities on their farms, such as pick your own fruit and vegetable visits. Such a package could include an explanation from the farmer of how the products are grown, picking product to take home, and sales of value-added products such as pies and jams as well as additional units of the fresh fruit or vegetable. The training would also include proper tourism service and business and financial management. This training program would be developed in coordination with specialty tour operators who are interested in offering such a product as part of their package, and who know the specifics of tourist demand for these products. The farmers will then be linked to the tour operators, who will market the product on behalf of the farmer, and benefit themselves from an additional tourism activity to offer as part of their packages.

This type of tourism product development initiative can be replicated with food processors, weavers, metal workers and glass blowers, and a range of other craftsmen who are able to develop an 'experiential' tourism activity.

- Support linkages between nature reserves and eco-destinations, and a campaign to differentiate between nature tourism and ecotourism in protected areas (versus adventure tourism). Support the engagement of the villages around nature reserves and eco-destinations such as the LMT to identify activities that increase the value of the reserves as a driver of economic development in these areas and provide economic incentives in these communities for the protection of the natural and cultural heritage. Support promotion and marketing of the villages around the nature reserves, and support training for local guides in the regions (mountain guides and forest guides) and specialized instructors for sports activities.
- Support improvements in quality control of alternative accommodation in the rural tourism sector, particularly guesthouses. Provide assistance to support the DHAI FEE network to develop and implement a quality label for alternative lodging. Develop new guesthouses and youth hostels in rural areas in association with the LMT.

ANNEX 1: RELEVANT GOVERNMENT REGULATIONS

MINISTRY OF TOURISM DECREE NUMBER 6298 GUESTHOUSES ORGANIZATION / REGULATION (TRANSLATION)

Issue number: 1/3401 – dated: 12 September 2011 - Decree number 6298

The President of the Republic,

According to the Constitution,

According to law number 21/66 dated 29 March 1966 and its amendments (establishing the Ministry of Tourism)

According to legislative decree number 27 dated 5 August 1967 (Authorizing the government to define, organize and classify tourist professions)

According to decree number 9427 dated 7 February 1968 (defining the tourism establishments and professions)

According to decree number 15598 dated 21 September 1970 and its amendments (setting the general conditions for establishing and investing in tourist establishments)

According to the Minister of Tourism's proposal,

After consulting the Senates council, (opinion number 201/2008 – 2009 dated 28 April 2009 and opinion number 219/2009 – 2010 dated 27 May 2010),

And after the approval of the Cabinet on 8 August 2011,

Decrees the following:

Article One: Definition of Guesthouses

They are special Lebanese houses equipped to receive and shelter persons interested in all kinds of outdoor sports, cultural and environmental tourism. They are chosen in Lebanese regions and villages in order to introduce foreign and Lebanese tourists, equally, to the popular customs and traditions as well as to the ordinary Lebanese life and cuisine.

Article Two: Guesthouses specifications

- It is preferable for the house to be located near attractive sceneries and/or the town square
- It is preferable for the house to be build according to the old style showing the Lebanese house characteristics or to have a unique style
- The bedrooms shall range between one and ten (without counting the households' bedrooms). They should be furnished and have a private or a shared bathroom.
- The house should meet the public health and safety conditions at all times
- The house can be built in a lot completely designated for this activity, in an allotted building or in a residential building provided that it does not violate the provisions of the allotted building administration to different rights.

Article Three: Guesthouses investment conditions

- 1- Every ordinary or moral person meeting the required conditions to deal in trade, having more than 21 years old, has the right to invest in a guesthouse, provided to abide by the tourist laws and regulations.
- 2- The investor should reside in the house or nearby
- 3- The investor should be able to receive all kinds of visitors. He or one of his residing family members should speak English or French in addition to Arabic.
- 4- The investor should be known by the local community and described by generosity and good hospitality

- 5- The investor, one of his residing family members or employee should be a good cook and masters the traditional Lebanese cuisine
- 6- The investor or anyone representing him should accomplish the mentioned training sessions in the investment conditions provided by a specialized technical party acknowledged by the Ministry of Tourism
- 7- The sessions should include courses in cooking in general and Lebanese cuisine specifically in addition to good reception, hospitality administration and tourist decrees in force
- 8- The investor, one of his residing family members or the employee should be able to provide the guest with tourist information
- 9- The investor should present the prices to the Ministry of Tourism for ratification and publicly expose them in the Arabic and Latin letters, then abide by them.
- 10- The investor should be open to accept the required amendments and reparations to meet the needs and requirements of the guest
- 11- The investor should make sure to guarantee safety and comfort standards for the guests
 - The investor is given a 3 months delay as of the date of presenting the request to the Ministry of Tourism in order to provide the requested missing documents
 - The Ministry of Tourism has the right to refuse the request provided that the decision is justified.
 - In case the request was approved by the Tourist accommodation department, the investor is given a 1 year primary approval renewable for one year. During this period, he will be under the Ministry of Tourism supervision. At the end of the period, the investor shall be granted a permit to invest in a guesthouse, which he should publicly expose in the house.
 - The guesthouses concerned with this regulation shall be subject to the conditions stipulated in the laws and regulations in force related to public safety and health. The competent administrations shall seek applying these regulations and laws.

Article Four: Required documents

Anyone willing to invest in a guesthouse should apply at the Ministry of Tourism and present a “Guesthouse investment” explaining the idea of the project along with the following documents:

- 1- Request to reserve the social denomination at the Ministry of Tourism
- 2- Identity Card or its equivalent proving that the house owner is Lebanese and is more than 21 years old.
- 3- Police record proving that the house owner, his wife and residing children are not convicted of any crime or misdemeanor.
- 4- A statement from the mayor certifying that the house owner is known by the local community and that he, his wife and residing children have good history and morals, are generous and welcoming.
- 5- Lease title or title deed for the house
- 6- Health certificate issued by the Municipality or competent authority
- 7- Photos of the house and its surroundings showing all its sides from the inside and outside
- 8- A pledge signed by the investor at the competent authorities committing to abide by the tourist laws in force

- 9- A certificate or statement proving that the investor, his representative or one of his residing family members speak English or French. This document can be dispensed of in case the competent department at the Ministry of Tourism proves that this condition is met
- 10- A statement or certificate proving that the investor or his representative has completed the mentioned training sessions in article three of the present decree.

Article Five: Investor and traveler’s rights and obligations:

The contract shall be signed between the guests and the investor after agreeing on all conditions. The principle of the contract is to inform the guests about the house regulations through memos posted in the rooms in the three languages: Arabic, English and French.

Upon signature of the contract, the traveler shall have the following rights:

- 1- A clean furnished bedroom with a private or shared bathroom with hot water for a certain fee agreed upon by the Ministry of Tourism.
- 2- The possibility for the traveler to share all the house rooms with the households except for their private rooms.
- 3- The traveler shall be responsible for any damage or loss taking place at the house resulting from his actions such as damaging the linen, furniture or other. However, the electrical current use in the house shall be subject to the house bylaws.
- 4- In case the traveler accepted the room, food and other services provided by the house without reviewing the price details, he would have implicitly accepted the prices adopted in the house.
- 5- The prices are usually calculated for a full day or a night. Residence shall start as of the date of arrival for 24 hours. Occupying the room after this period shall be considered as a prolongation for one day, unless otherwise agreed upon between the traveler and investor.
- 6- Travelers are not allowed to bring in animals with them without a prior agreement with the investor. It is not allowed also to bring in these animals to the sitting room or dining room. However, bringing them into the sleeping room remains subject to the investor’s authorization.
- 7- Music, radio and all kinds of meetings producing noise and disturbing others are not allowed in order to guarantee the comfort of the traveler, house guests and surroundings.
- 8- The investor is responsible for the items and money entrusted and given to him by a receipt. He is also held liable for any action resulting from his mistake or neglect. The provisions of the relevant articles in Contracts and Obligations shall be applied on him.
- 9- The investor has the right to seize the travelers’ items at the house in order to collect the fees and expenses that should be settled, after informing the General prosecution and Ministry of Tourism.
- 10- Any person staying, eating or drinking at the guesthouse, knowing that he won’t be able to pay the due, shall be subject to the provisions of the relevant article of the Sanctions Code.
- 11- The lost items found at the house should be kept by the investor who will notify the concerned person and hand them to him.
- 12- The investor shall have the right to accept or refuse the people damaging the house whether morally or materially, provided that he respects the non-discrimination principle.
- 13- Every violation to the residence rules and manners committed by the traveler gives the investor the right to terminate the contract immediately.

- 14- In case of death, the investor shall inform the closest Police or Local security station immediately or the General Prosecution. He shall refrain from handing over any of the deceased person's items until after the approval of the competent authorities.
- 15- In case of an epidemic hazard, the investor shall take all primary measures to isolate and disinfect the contaminated area and inform the competent authorities at the Ministry of Health.
- 16- According to the provisions of article 685 of the Sanctions Code, any action or saying carried out by any investor whether by publishing false information or defaming any other guesthouse in any other way shall be considered an illegal venture
- 17- The investor shall have the right to enter the leased rooms in the house with the main key for the purpose of cleaning, tiding and providing the necessary items only. In all cases, he shall not annoy the traveler but respect his privacy and comfort.
- 18- Guesthouses investors shall keep registers and books for the check-in and check-out of the guests in order to present them to the official authorities when requested.

Article Six: Control system

Guesthouses are subject to the provisions of annex number 3 of decree number 15598 dated 21 September 1970 and its amendments.

Article Seven: This decree shall be valid upon publishing in the Official Gazette.

Issued by the President of the Republic

Baabda on 9 September 2011

Signature: Michel Sleiman

Signature: Mohamad Najib Mikati

Minister of Interior and Municipalities

Signature: Marwan Charbel

Minister of Justice:

Signature: Chakib Kortbawi

Minister of Finance

Signature: Mohamad Safadi

Minister of Public Health

Signature: Ali Hassan Khalil

Minister of Public Works and Transportation

Signature: Ghazi Aaridi

Minister of Tourism

Signature: Fady Abboud

Certified true copy

Signature General Manager of the Presidency

1. **Ministry of Tourism Establishment Classification for Hotels(under translation)**
2. **Ministry of Tourism Establishment Classification for Tourist Residence (under translation)**
3. **Ministry of Tourism Establishment Classification for Restaurants (under translation)**

ANNEX 2: DRAFT GOVERNMENT REGULATIONS

1. Draft Charter for Responsible Tourism

Ministry of Tourism – Lebanon, March 2008

PASCAL ABDALLAH

Responsible Mobilities - Making Tourism a Positive Experience

a. Introduction

Since 1995 the tourism sector in Lebanon has not only been subject to augmentation in number of arrivals, but also experienced diversity in the tourism product. Many new adventure clubs, tour operators, associations begun to organize trips to the rural areas and in parallel many adventure and nature parks have seen the light, many tour guides considered themselves as mountain guides or ecotourism connoisseurs.

The ecotourism trend and fever hit the sector in Lebanon without neither enough awareness to the subject at both the visitors and the operators' levels, nor any control from the government side.

In addition to this situation the existing rules that organize the tourism activity in Lebanon didn't show any modernization, to accompany this mutation, leading to total chaos in the area of new trends of tourism.

Taking into consideration all these problems and with a worry of implementing the recommendations of the 2000 Millennium Development Goals, and with the pressing need to regulations and control, I present a draft paper of a 'Charter for Responsible Tourism in Lebanon', inspired from internationally recognized codes and guidelines, and adapted to the Lebanese context.

This study aims at reaching all the tourism segments in Lebanon: Travel agents, Tour operators, Tour guides, Hotels and Restaurants, Adventure parks, Protected areas and Nature reserves, Associations, Land transport companies, Ministry of tourism, Local communities, Tourists and Visitors . . .

With the hope that Responsible Tourism finally establishes itself at the public and private levels in Lebanon, and that the ministry of tourism gets more authority with this tool in hand to ensure regulatory and monitoring mechanisms, and be able to prepare new laws.

b. Review of main international code of ethics and guidelines

Charte Ethique du voyageur – ATALANTE – 1997

Like its title shows this charter made by a group of tour operators is addressed to the traveler, the tourist, the visitor and the discoverer. It doesn't regulate or give any guideline for the activities of the Tour Operator as an entity by itself, it only gives guidelines for the visitor and it covers the following topics:

- Respect is the pledge for a better meeting (ethical aspect)
- Money, goods, food doesn't have the same values everywhere (Socio-economic aspect)
- Leave only your footprints (Natural heritage)
- Cultural heritage inscribed in the history for future generations (cultural heritage)

Tour Operators Initiative – 2000

Integrating sustainability into tour operators' business practices, is considering environmental, social, and economic aspects throughout the process of developing a holiday package.

The key operating areas where tour operators can integrate sustainability practices are:

- **Internal management** by taking into account sustainability principles in the management of human resources, office supplies and production of printed materials;

- **Product development management** by planning tours and selecting holiday package components that minimize environmental, economic and social impacts;
- **Contracting with suppliers** by integrating sustainability principles into the selection criteria and service agreements of suppliers;
- **Customer relations** by guaranteeing privacy, health and safety standards, and providing customers with information on responsible behavior and sustainability issues at their destinations; and
- **Relation with destinations** by supporting destination stakeholders' efforts to address sustainability issues and proactively contributing to conservation and development projects

Global Code of Ethics for Tourism – UN/WTO – 1999 – 2001

This valuable document is the fruit of the Agreement and Cooperation between the United Nations and the World Tourism Organization; it is produced by members of the WTO, representatives of the world tourism industry, delegates of the states, territories, tourism enterprises, institutions and bodies. It has 10 Articles addressed to all members of the tourism sector.

Article 1: Tourism's contribution to mutual understanding and respect between people and societies:

- 1 – Ethical values common to humanity; respect for the diversity of religious, philosophical and moral beliefs; observe and recognize the worth of social, cultural traditions.
- 2 – Tourism activities should be conducted in harmony with the attributes and traditions of local host communities.
- 3 – The host communities should respect the tourist
- 4 – Protection and safety of the tourist by the public authorities
- 5 – Tourists should not commit criminal acts
- 6 – Tourists should acquaint themselves with the destination even before departure

Article 2: Tourism as a vehicle of individual and collective fulfillment:

- 1 – learning about legitimate differences
- 2 – Equality of men and women; human rights and individual rights
- 3 – Human exploitation, sexual abuse conflicts with the fundamental aims of tourism
- 4 – Encouragement of forms of tourism: religious, educational, health ...
- 5 – Introduction of tourism in the curricula of education

Article 3: Tourism a factor of sustainable development:

- 1 – All the stakeholders in tourism should safeguard the natural environment with economic growth...
- 2 – All forms of tourism development that preserves natural resources should be encouraged by national, regional and local authorities
- 3 – Reducing the pressure of tourism activities on the environment with benefits to the local communities.
- 4 – Tourism design and infrastructures should protect the natural heritage and the ecosystems ...
- 5 – Nature tourism and ecotourism are recognized as being particularly enriching to the tourism industry
- ...

Article 4: Tourism, a user of the cultural heritage of mankind and a contributor to its enhancement:

- 1- Tourism resources belong to the common heritage of mankind
- 2 – Tourism policies should respect the artistic, cultural, archeological heritage
- 3 – Part of the financial resources should be used to safeguard and development of the cultural sites
- 4 – Tourism activity should be planned for the protection of craft and folklore ...

Article 5: Tourism, a beneficial activity for host countries and communities:

- 1 – Local populations should be associated with tourism and share equitably in the economic, social and cultural benefits...
- 2 – Tourism policies should be applied in a way to raise the standard of living of the local populations ...
- 3 - ... rare opportunities for development in the face of the decline of traditional economic activities.
- 4 – Authorities should carry out studies of the impact of their development projects ...

Article 6: Obligations of stakeholders in tourism development:

- 1 – Tourism professionals should provide tourists with objective and honest information ...
- 2 - and should show concern in cooperation with public authorities, for security, safety, food safety, insurance assistance...
- 3 – and participate to the cultural and spiritual fulfillment of tourists and allow them practice their religions.
- 4 – The public authorities of the generating states and of the host countries, should ensure that the necessary mechanisms are in place...
- 5 – Governments should inform their nationals of the difficult circumstances ... in crisis situations ...
- 6 – Specialized press should issue balanced information ...

Article 7: Right to tourism:

- 1 – Tourism is a right to all the world's inhabitants
- 2 - ... reasonable working hours
- 3 – Social and associative tourism should be spread with the help of the public authorities
- 4 – Family, youth, students and tourism for disable people should be encouraged ...

Article 8: Liberty of tourist movement:

- 1 – Tourists should benefit in compliance with international laws and national legislations from the liberty to move in their countries or from a country to another ...
- 2 - ... access to all forms of communications ...
- 3 – Confidentiality of personal data ...
- 4 - ... facilitate border crossing procedures...
- 5 – Access to convertible currencies needed for travel ...

Article 9: Rights of the workers and entrepreneurs in the tourism industry:

- 1 – Guaranteed salaries
- 2 – Appropriate and continuous training
- 3 - ... free access to the tourism sector, with a minimum of legal or administrative restrictions.
- 4 – Exchange of experience ... fosters the development of tourism
- 5 – ... multinational enterprises should not exploit the dominant positions
- 6 – Partnership and balanced relations

Article 10: Implementation of the principles of the Global Code of Ethics for tourism:

- 1 – The public and private stake holders in the tourism development should cooperate in the implementation of these principles and monitor their effective application.
- 2 - ... recognize the role of international institutions ... WTO ...
- 3 – The world committee on tourism ethics.

Quebec declaration on Ecotourism – 2002

The purpose of this document is to put a preliminary agenda and a set of recommendations for the development of ecotourism activities in the context of sustainable development. It is proposed to governments, the private sector, non-governmental organizations, community based associations,

academic and research institutions, inter-governmental organizations, international financial institutions, development assistance agencies, and indigenous and local communities. It has 6 main chapters:

A – To the national and local governments

Policies and strategies conform with sustainable development, guarantee the protection of nature, involve public institutions, ensure regulatory and monitoring mechanisms, develop municipal capacity, develop certification schemes and eco-labels, support SMEs, policies and management plans for visitors, promotion of SMEs, support and create regional networks, provide incentives to TOs to adopt the principles of ecotourism, (No13) important, support institutions that invest in research programs, implementation of international principles and guidelines, promote educational programs, outbound and inbound TOs, transportation.

B – To the private sector

Profitable to all stakeholders, minimize negative effect, benefiting local communities, incorporate sustainability principles, adopt certifications and eco-labels, cooperate with governmental and non-governmental organizations, increase use of local products, promote ethics among clients, generate awareness among managers and staff, diversify the offer, create funding mechanisms, ensure equitable distribution of financial revenues, formulate company policies.

C – To NGO's, Community based associations, academics and research institutions

Provide support to ecotourism destinations and host communities, research on impact of tourism upon ecosystems and local populations, cooperate with public and private organizations, and with research institutions.

D – To inter-governmental organizations

Implementation of local and international policies, human rights, biodiversity conservation, adopt international standards and certifications, multi-stakeholder dialogue, develop human resources capacities, trainings.

E – To local and indigenous communities

Strategies for collective benefit, maintain the use of traditional skills.

F – to the World summit on sustainable development (WSSD)

Recognize the need to apply the principles of sustainable development to tourism, and the exemplary role of ecotourism in generating economic, social and environmental benefits.

Oslo Statement on Ecotourism - 2007

This document is a tool for ecotourism stakeholders both in the public and private sectors to assess the current state of the globalecotourism communit, to evaluate the challenges facing ecotourism today,ad to establish goals and benchmarks for the coming years. It marks 5 years since the International Year of Ecotourism (IYE) held in Quebec in 2002.

It has a set of recommendations around 4 key areas :

- 1 – Recognize the valuable role that ecotourism plays in **local sustainable development**.
- 2 – Maximize the potential of well managed ecotourism as the key economic force for the **conservation** of tangible and intangible natural and cultural heritage.
- 3 – Support the viability and performance of ecotourism enterprises and activities through effective marketing, **education and training**.
- 4 – Address some of the **critical issues facing ecotourism** in strengthening its sustainability.

c. Conclusion with regards to the role of the government or

public authority

The most influential and most important documents at this stage of our study, are the “Global Code of Ethics for Tourism” and the “Quebec Declaration on Ecotourism”. Underlined, here below are the texts that indicates clearly the role of governments.

- **The Global Code of Ethics** for Tourism makes reference in nearly all its 10 articles to the role of the government:

Article 1, no 4: It is the task of the public authorities to provide protection for tourists and visitors and their belongings; they must pay particular attention to the safety ... in accordance with their respective national laws.

Article 2, no 3: The exploitation of human beings in any form conflicts with the aim of tourism; and it should be combated with the cooperation of all the states concerned, in accordance with international laws

...

Article 3, no 2: All forms of tourism development that are conducive to saving rare and precious resources should be given priority and encouragement by national, regional and local public authorities.

Article 5, no 4: Tourism professionals, particularly investors, governed by the regulations laid down by the public authorities, should carry out studies of the impact of their development projects on the environment and natural surroundings ...

Article 6, no 2: Tourism professionals, should show concern, in cooperation with public authorities, for the security and safety, accident prevention, health protection... of their tourists and should ensure the existence of suitable systems of insurance and assistance...

Article 6, no 4: The public authorities, in cooperation with professionals ... should ensure that the necessary mechanisms are in place for the repatriation of tourists in the event of the bankruptcy of the enterprise that organized their travel.

Article 6, no 5: Governments should inform their nationals of the difficult circumstances ... in crisis situations ...

Article 7, no 3: Social and associative tourism should be spread with the help of the public authorities.

Article 9, no 1: The fundamental rights of salaried and self-employed workers in the tourism industry and related activities, should be guaranteed under the supervision of the national and local administration ...

Article 9, no 3: Free access to the tourism sector with a minimum of legal or administrative restrictions (especially in the area of SMEs)

Article 10, no 1: The public and private stake holders in the tourism development should cooperate in the implementation of these principles and monitor their effective application.

- **The Quebec Declaration on Ecotourism**, allocates its chapter ‘A’ to the ‘National and Local Governments’ and encourage them to

Formulate national policies,

guarantee the protection of nature and culture,

ensure the involvement of inter-ministerial working groups,

include the necessary regulatory and monitoring mechanisms,

develop the local and municipal capacity

use internationally approved and reviewed guidelines to develop certification schemes, eco-labels; and support the implementation of the international principles guidelines and code of ethics...

ensure technical, financial and human resources support to SMEs

define appropriate policies, management plans...

include SMEs and NGOs in the overall promotional strategies, both in the international and domestic market

encourage regional networks

We should be aware that all these recommendations addressed to the governments, are considered as tools and means to regulate, monitor and perhaps legalize the responsible tourism activity in the future.

d. The Charter (The charter below is a draft study)

The understanding and promotion of ethical values common to humanity, With an attitude of tolerance and respect for the diversity of religious, philosophical and moral beliefs, are both the foundation and the consequence of responsible tourism;

Article 1- # 1: Global Code of Ethics for Tourism UNWTO - 2001

To the Government and Public Authority

- Formulate national responsible tourism policy and a development strategy that are consistent with the overall objectives of sustainable development
- Establish an inter-ministerial working group
- Set up budgetary mechanisms and appropriate legislative framework
- Formulate regulatory and monitoring mechanisms at the national, regional and local level
- Develop the local municipal capacity to implement growth management tools such as zoning, land use planning.
- Use and implement internationally approved guidelines to develop certification schemes, eco-labels and other voluntary initiatives geared towards sustainable tourism.
- Ensure the technical, financial and human resources support to SMEs which are the core of ecotourism enabling them to grow in a sustainable manner
- Include SMEs, NGOs, in the overall promotional strategies and programs carried out by the National Tourism Administration, both in the international and domestic markets.
- Encourage the creation of regional networks.
- Promote and develop educational programs, to enhance awareness about nature conservation and sustainable use of local and indigenous cultures.
- Incorporate sustainable transportation principles in the planning and design of access and transportation systems, and encourage tour operators and the traveling public to make soft mobility choices.
- Stimulate sustainable farming and livestock practices that support mutual economic advantage by encouraging creative links between ecotourism and other forms of innovative land use, such as sustainable agriculture and agroforestry.
- Encourage innovative product development and fair trade through strengthening links with the arts, handicrafts, and local indigenous heritage.
- Promote sustainable partnerships between private and public sectors to address the role of tourism as a development tool.
- Develop strategies to engage and empower local and indigenous communities in planning, decision making and enterprise ownership for the sustainable management of tourism through stronger cross-sectoral partnerships.
- Strengthen the knowledge, skills and resources of protected area authorities in developing and managing ecotourism.
- Actively combat tourism's impact on climate change by encouraging adapted travel patterns, promoting more energy-efficient, alternative transport options, utilizing reduced and zero-emission operation technologies.
- All forms of tourism development that are conducive to saving rare and precious resource, in particular water and energy, should be given priority and encouraged by national, regional and local public authorities.
- The exploitation of human beings in any form, particularly sexual, especially when applied to children, conflicts with the fundamental aims of tourism and is the negation of tourism.

To the Private Sector:

- Minimize negative effects of tourism activities on the environment and directly benefit local communities.
- Ensure that the design, planning, development and operation of tourism activities and facilities incorporate sustainability principles.
- Adopt reliable certification scheme or voluntary regulation, such as eco-labels.
- Cooperate with governmental and non-governmental organizations in charge of protected areas, ensuring that ecotourism operations are practiced according to the management plans and other regulations.
- Increase use of local materials and products, as well as logistically and human resource input in the operations.
- Work actively with local communities to ensure that indigenous culture and communities are well respected.
- Promote among their clients an ethical and environmentally conscious behavior vis-à-vis the ecotourism destinations visited.
- Generate awareness among all management and staff of local, national and global to environmental and cultural issues through ongoing environmental education...
- Diversify their offer and extend their operations to different destinations in order to spread potential benefits of ecotourism and responsible tourism.
- Tourism professionals have an obligation to provide tourists with objective and honest information on their places of destination and on the conditions of travel, hospitality and stays...
- Ensure equitable distribution of financial benefits from ecotourism and responsible tourism revenues.
- Tourism professionals, investors, should carry out studies of the impact of their development projects on the environment and natural surroundings; they should also deliver, with the greatest transparency and objectivity, information on their future programs and their foreseeable repercussions and foster dialogue on their contents with the populations concerned.
- Salaried and self-employed workers in the tourism industry and related activities have the right and the duty to acquire appropriate initial and continuous training; they should be given adequate social protection.
- **To the press:** the press and particularly the specialized travel press and the other media, including modern means of electronic communication, should issue honest and balanced information on events and situations that could influence the flow of tourists; they should also provide accurate and reliable information to the consumers of tourism services; they should not in any way promote sex tourism.

To NGOs and Academic & Research institutions:

- Provide technical, financial, educational, capacity building and other support to ecotourism destinations, host community organizations, small businesses and the corresponding local authorities in order to ensure that appropriate policies,
- Develop and manage guidelines, and monitoring mechanisms to be applied towards sustainability.
- Conduct research on the actual impacts of ecotourism activities upon ecosystems, biodiversity,(in mountains and coastal areas) local and indigenous cultures and the socio-economic fabric of the ecotourism destinations.
- Cooperate with public and private organizations ensuring that data and information generated through research is channeled to support decision-making processes in ecotourism development and management.
- Cooperate with research institutions to develop the most adequate and practical solutions to ecotourism development issues.

- Tourism activities should respect the equality of men and women; they should promote human rights and more particularly, the individual rights of the most vulnerable groups, notably children, the elderly, the handicapped, ethnic minorities.

To the Local Communities:

- The host communities, on the one hand, and local professionals on the other, should acquaint themselves with and respect the tourist who visit them and find out about their lifestyles, tastes and expectations.
- Tourism resources belong to the common heritage of mankind; the communities in whose territories they are situated have particular rights and obligations to them.
- Local populations should be associated with tourism activities and share equitably the economic, social and cultural benefits they generate, and particularly in job opportunities.

To the Tourist:

- When traveling, tourists and visitors should not commit any criminal act or any act considered criminal by laws of the country visited and abstain from any conduct felt to be offensive or injurious by the local environment; (trafficking in illicit drugs, arms, antiques, protected species...)
- Tourists and visitors have the responsibility to acquaint themselves, even before their departure, with the characteristics of the countries they are preparing to visit; they must be aware of the health and security risks inherent in any travel outside their usual environment and behave in such a way as to minimize those risks.
- Sometimes while visiting some countries and in particular conservative regions, tourists can chock with their casual and relaxed way of clothing, they should be aware of the cultural specificities of the visited countries or communities.
- Ask permission before taking photos.
- It is preferable not to promise to any person of sending back the photos taken while visiting a country, unless the tourist is sure that he will come back soon.
- Do not encourage begging by giving small gifts to children at the entrances of sites.
- It is preferable to use the local hotel facilities rather than the international hotel chain, in a direct support to the local economy.
- Do not buy illegal souvenirs (of animals, archeological, sacred ...)
- Leave no trace behind , take only souvenirs.

e. Implementation plan

- Rebuild the inter-ministerial committee
- Develop a national strategy for rural tourism and ecotourism
- Adopt and Declare the above “Charter for Responsible Tourism in Lebanon 08”
- Encourage the formation of working groups, on different levels of the tourism sector
- Design new specified certification schemes, more detailed and specialized (for mountain areas, coastal areas, forestry, tour operators, Nature parks, Adventure parks, tourist guide and tour companion ...) inspired by the main charter and international codes and guidelines.
- Enforcement of certification attestation from the ministry of tourism

- Design and conduct new training line for all levels of tourism sector
- Design a new brochure for responsible tourism, ecotourism, rural tourism in Lebanon
- Organize special events with regards to Responsible tourism
- Participate to regional and international specialized exhibitions
- Install the TSAs system in Lebanon, allowing reliable statistics.

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