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# **Clusters Assessment Report**

## **Final**

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## ACRONYMS

ACOR	American Center for Oriental Research
ASEZA	Aqaba Special Economic Zone Authority
BDS	Business Development Services
BOD	Board of Directors
CBO	Community Based Organization
CoE	Centers of Excellence
DCA	Development Credit Authority
DoA	Department of Antiquities
GDA	Global Development Alliance
GOJ	Government of Jordan
JAU	Jordan Applied University
JHA	Jordan Hotel Association
JHTEC	Jordan Hospitality and Tourism Education Company
JITOA	Jordan Inbound Tour Operators Association
MBR	Market Based Representatives
M&E	Monitoring and Evaluation
MICE	Meetings, incentives, conferences and exhibitions
MFI	Microfinance Institution
MOE	Ministry of Education
MoTA	Ministry of Tourism and Antiquities
MSME	Medium and Small Micro Enterprises
NGO	Non-Governmental Organization
PNT	Petra National Trust
PSP	Private Sector Participation
RSCN	Royal Society for the Conservation of Nature
SAVE	Scientific, academic, volunteer and educational
SIU	Strategy Implementation Unit
SSC	Strategy Steering Committee
TA	Tourism Associations
TOT	Institutional of Trainers
TSA	Tourism Satellite Account
USAID	United States Agency for International Development

## INTRODUCTION

### Objectives of this report

The Siyaha program supports directly the successful implementation of the National Tourism Strategy 2004-2010 developed in 2004 by the Ministry of Tourism and Antiquities and the tourism trade/private sector of the Kingdom of Jordan and approved by the council of ministers. This Strategy features four key pillars of which the second is “Enhance Product Development and Competitiveness”. This report supports Component 2 of the Siyaha program entitled “Product Development” which is logically underpinned by this pillar. The key objective of this report is to prioritize and assess development opportunities at four site-based tourism clusters in Jordan with a view to strengthening their offer to boost their competitiveness and attract international tourism. The report is to provide a logical framework for destination development at each cluster. It directly supports the participatory rapid assessments to be undertaken at each cluster, which are focusing on the resources available in each community. The report also identifies possible interventions at these clusters that the Siyaha program can consider for implementation in its early stages of operation as demonstration projects.

### Organization of this report

The report first describes in chapter 1 the process of identifying a long list of clusters and performing a selection of four of them according to a set of criteria on which the initial steps of the Siyaha program will focus. These are the priority or pilot clusters in which the team will perform participatory rural assessments and then define demonstration projects.

Common problems hindering product development found in most or all of these clusters are covered in chapter 2 to prevent repetition of the same points in the set of four cluster chapters. Chapters 3 to 6 each focus on the individual clusters providing a logical framework for the strengthening of international tourism in each cluster including a set of diagnostic elements. These are followed by a list of suggested interventions effectively boosting each cluster’s competitiveness, in a direct or indirect way, suitable for implementation in the short to medium term.

Chapter 7 presents some additional observations and considerations with respect to the selection of demonstration projects from the programming perspective. The annexes of the report contain information on cluster definition, prioritization and selection, references, persons interviewed and meetings held, observation reports and minutes of key meetings.

The work flow for this report

**THE WORKFLOW FOR THIS REPORT WAS AS FOLLOWS. THE FIELD TRIP TO JORDAN TOOK PLACE NOVEMBER 6-23, 2005. PRIOR TO TRAVEL TO JORDAN THE CONSULTANT REVIEWED PUBLISHED MATERIALS INCLUDING GUIDEBOOKS, JORDAN TOURIST BOARD MATERIALS [CD, PRINT AND WEBSITE], PAST TOURISM SECTOR STUDIES BY USAID, THE WORLD BANK AND JAPAN INTERNATIONAL COOPERATION AGENCY, AS**

**WELL AS RECENTLY PRODUCED MATERIALS BY COLLEAGUES WITHIN THE PROJECT TEAM AND OUTPUTS OF THE MARKETING AND PRODUCT DEVELOPMENT WORKING GROUPS SUPPORTING IMPLEMENTATION OF THE NATIONAL TOURISM STRATEGY. DURING THE FIELDWORK HE INTERVIEWED SOURCES FROM THE TEAM, FROM ITS STRATEGIC STEERING COMMITTEE, AND FROM THE TRAVEL INDUSTRY OPERATING IN JORDAN. HE ALSO CONDUCTED INSPECTIONS OF RELEVANT SITES IN THE FOUR CLUSTERS AND ATTENDED COMMUNITY WORKSHOPS HELD IN EACH OF THEM. THIS REPORT WAS DRAFTED AFTER THE FIELD TRIP IN THE HOME COUNTRY. ANY OF THE EXHIBITS THAT IT CONTAINS CAN BE USED IN PRESENTATIONS TO BE MADE WITHIN THE CLUSTERS TO CLEARLY ILLUSTRATE KEY POINTS FOR STAKEHOLDERS TO GRASP.**

## **CHAPTER 1 – CONTEXT FOR THE CLUSTER APPROACH**

### **A. THE NATIONAL TOURISM STRATEGY**

The National Tourism Strategy represents the Kingdom's approved approach to virtually double the volume of the tourism industry over the period 2004 to 2010 to derive socio-economic benefits across different areas of the country.

*Its vision is: Tourism is an essential and vibrant growth sector that will contribute to improving the long-term economic and social well-being of Jordanians.*

*Its mission is: Jordan will develop a sustainable tourism economy through a partnership of government, the private sector, and civil society to expand employment, entrepreneurial opportunity, social benefits, industry profits and state revenue.*

It is based on four strategic pillars being:

Pillar 1: Strengthen Tourism marketing

Pillar 2: Support Product Development and Competitiveness.

Pillar 3: Develop Human Resources

Pillar 4: Provide Effective Institutional and Regulatory Framework

The pillars on marketing, human resources and the institutional and regulatory framework will modernize the overall environment and business culture for the sustainable expansion of the tourism sector in all of its components. In contrast, it is the second pillar for product development and competitiveness which will have the most direct impact at the destination or cluster level where the communities are intimately involved. In plain terms the benefits of this strategy are to be achieved through measures such as the level of visitor volume, the average length of stay at an attraction or in a cluster, the rising average expenditure per visitor for spending components like lodging, food or entertainment, advances in product quality and standards, and the like.

### **B. DEFINITION OF A TOURISM CLUSTER**

A tourism cluster is a grouping or collection of tourist attractions or potential attractions and support services such as lodging, foodservice and entertainment, in a relatively compact area containing one or more towns or villages. It is similar to a tourist destination. A site-based cluster is one that contains a natural or historic site of some renown that represents the key magnet or attraction for tourism in the vicinity. Ajloun is an example of this since it contains the famous Ajloun Castle. A community-based cluster contains one or more towns or villages and may contain different attractions. The Madaba cluster is an example of a community-based cluster that contains several attractions or magnets dispersed in different directions from the town of Madaba, no one of which dominates the cluster.

In general clusters are defined to cover an area within no more than a 30-minute driving radius from its center. Tourism clusters need to provide essential services including

- accommodation [commercial or community based]
- foodservice [ideally for different pocketbooks and tastes],
- transportation both to and from the cluster as well as within it

- active and passive daytime activities [“before 6PM”] serving a range of groups such as older cultural travelers, families with children, hikers and walkers, for example
- night entertainment and activities [“after 6PM”] to fill the evening hours
- tourism services that enrich the experience including tour guides, tour books, interpretive signage and maps

A cluster without lodging would have to be within a reasonable driving distance of a location with acceptable lodging [the case of Jerash] to be viable. However, the cluster concept represents more than just a geographic collection of resources in close proximity and has meaning on a functional level. It also refers to the availability of a combination of services from the tourism supply chain that complement each other and facilitate the flow of tourists. The stakeholders controlling the resources are both public and private sector ones and in the successful cluster they collaborate in mutually beneficial relationships relying on the exchange of information and a mutual understanding of the tourist industry they are serving.

### **C. SELECTED SUCCESS FACTORS FOR A TOURIST CLUSTER**

Certain factors relating to the success of a cluster are indicated below.

#### **An attraction or magnet of strong market appeal**

A cluster needs to offer one or more sites with cultural resources or natural resources that are so outstanding in character that they form a magnet or lure for one or more types of travelers. At Ajloun and Jerash the outstanding heritage sites of Ajloun Castle and ancient Gerasa represent these magnets. In Wadi Rum it is the area’s famed ‘painted desert’ that is the magnet. At the Madaba cluster, interestingly there is no one dominant resource serving as the prime magnet. The two attractions of the Orthodox St. George Church and Mt. Nebo Church together with panorama at the latter, represent the cluster’s basic touring pattern.

#### Meeting expectations of the target segments:

Visitors are traveling to achieve diverse objectives such as gaining knowledge of a different culture [cultural travelers], pursuing sports or other challenging activities [sports/adventure], visiting religious sites [religious], attending meetings or conferences [“MICE”], pampering themselves with wellness services [health & wellness] to name some of the key segments of tourism. Market-driven service providers will know exactly which types of travelers are their target segments, what the expectations for each type are, and therefore organize their performance to meet or exceed these expectations.

#### Awareness of the Holistic nature of tourism:

This factor refers to the awareness by the cluster’s service providers of the *value chain* nature of tourism and their mutual responsibility to produce up to standard. Such



providers see the holistic nature of tourism and the need for collaboration for it to succeed.

Quality consistency:

The travel entrepreneur composes his travel products from the various essential services listed above up to a consistent and high level of quality. This produces high quality all along the value chain not only for essential services but also for educational content, the timing and comfort for transportation, the accuracy of the product information and ease of purchasing, and in other aspects. The cluster that offers well-coordinated links to a high standard in the overall travel experience will be a successful one.

Logistical convenience:

Transport conditions to the cluster and also within it need to be adequate. This means that circulation within it whether by foot, bicycle, auto or coach, must be safe and easy to use. It also means that transport between it and other clusters or a tourism center must also be adequate in terms of comfort, cost and duration. The better the ease of circulation for the motor coaches in terms of driving times, scenic interest and safety, the more favorable for the cluster.

## CHAPTER 2 – THE COMMON CLUSTER AND PRODUCT DEVELOPMENT ISSUES

### A. IDENTIFYING THE WEAK LINKS IN THE TOURISM VALUE CHAIN

The focus of this work is on the cluster and the sites and communities that each one of them contains. Community members in the cluster have substantial control over several of the links in the tourism value chain in varying degrees, but not over all of the links. The following table depicts the seven links, the level of control that the players in the cluster have over each, and the most common tools that are available to them.

The tourism Value Chain: Level of Community Control by Value Chain Link

<b>Link</b>	Info & sales	Travel to destination	Arrival & orientation	Lodging	Attractions & activities	Travel home	After sales service
<b>Community Level of control</b>	low	nil	HIGH	HIGH	HIGH	nil	low
<b>Key player</b>	Tour operators, JTB	Tour operators, airlines	Tour operators, JTB offices	Owners of hotels, guest houses	Owners, organizers, craftsmen & artisans, DOA for antiquities, RSCN for parks	Tour operators, airlines	Tour operators, hotel owners
<b>Tools available</b>	Brochures, website, guide book & press coverage	Taxis	Signage, maps, info kiosks, tour guides	Good management, hygiene, attractiveness of premises	Festivals, entertainment, arts & crafts, cultural sites, religious sites, antiquities, wellness services	Taxis	Feedback questionnaires

The communities enjoy a high level of control only over the innermost or middle links in the chain, namely those covering arrival & orientation, lodging and attractions & activities. As for the other links, the travel agencies and tour operators based in Amman or even in the source markets are key players. The Jordan Tourist Board is a key player with respect to the first link of information and sales provided outside of Jordan and it works heavily in conjunction with the tour operators in the source countries for this purpose, nevertheless the community-based enterprises can play a part in promoting and marketing their attractions and services especially to FITs and to Tour Operators.

## **B. THE WEAKEST LINKS BY CLUSTER**

This section provides a brief qualitative assessment of each of the four priority clusters selected for this stage of the project. A product analysis of each cluster including a SWOT analysis was prepared for each cluster separately and is presented in the four following chapters.

### ***Ajloun cluster***

For most visitors this cluster is a mono-product one offering only the single, outstanding attraction of the Qala'at er Rabad castle site and nothing more, which is easily visited during a 90-minute stop. The castle site is very weak in terms of interpretive information via all media available [posted or recorded information, site guides, exhibits] and the "visitor information" center is utilized. The castle has some logistical problems as well – the parking area at the castle lacks space to accommodate more than one bus. Many, perhaps most of the visitors, leave it wishing to know more about themes such as its military architecture, its role in strategic struggles such as the Crusades, or its importance during the times of the leader Saladin. Many visitors no doubt depart with more questions about it than before the visit.

The cluster is extremely weak in terms of attractions and activities at present so cultural visitors see only the castle and bypass the town. The Arab visitors who come for summer vacation, are also reported not to spend much time in the town. The Ajloun Reserve does attract Jordanians seeking recreation in the nature but does not attract many tourists. The nearby Mar Elias site of ancient temple ruins (desperately needing shelter for the mosaics), and a church in the town of Anjara represent two points of interest for religious visitors. There are two hotels in Ajloun town, but tour groups do not generally use them, as their quality of service is low. In summary, the cluster's weak links include the 'attractions & activities' one and the lodging one. However, this cluster is having some success in drawing the Arab vacation market as a number of owners in the cluster are renting villas to Gulf families during the summer months.

### ***Jerash cluster***

The assessment of this cluster closely parallels that of Ajloun. This cluster also is a mono-product one with the ancient site of *Gerasha* being the sole magnet for tourism to the cluster. As in Ajloun, logistics are very good with travel times from Amman and from other clusters very comfortable. And again as in Ajloun, the greater part of the 160,000 annual visitors to the ancient site depart spending little or no time in the modern town which is steps away from the gates of the site. Similarly, there is little awareness of the holistic nature of tourism by the local business community. The *Jerash Festival*, which is

an annual event lasting some two weeks and drawing a total of some 300,000 persons, is reported to generate few linkages or much stimulus for the local community. There is the development now in progress, of a new commercial attraction reflecting a strong cultural theme, the Roman chariot races to be staged in the ancient hippodrome. The success of this innovative venture will have to be achieved in 2006.

The weakest links in this cluster include the 'attractions & activities' link and also the lodging one. It is worth noting that the town of Jerash has no hotel of any kind, which is evidence of the weakness of the attractions link. Few visitors are interested in spending the night there.

### ***Madaba cluster***

The assessment of the Madaba cluster contrasts greatly with those for Ajloun and Jerash. Extending from Bethany in the north to the villages of Dhiban and Um ar Rassas in the south, it covers a scenic and very historic area known in the Bible as the Plain of Moab, that could be called the *Dead Sea Highlands*. This cluster is anchored by the town of Madaba and contains a scattering of villages strewn across the bluffs descending to the Dead Sea, many having spectacular scenery. This cluster makes up part of the fabled Holy Land for Christians and contains three of the six Vatican-sanctioned pilgrimage sites in the kingdom. It possesses a very varied resource base and can target cultural visitors [both group and FITs], religious pilgrims, and sports and adventure-minded visitors for its key tourist segments. Other non-biblical resources in this cluster include Hamamat Ma'in, the Dead Sea Panoramic Complex, the mosaic crafts industry, the weaving industry [Bani Hamida], and the historic core of Madaba town containing a few ancient structures and charming Ottoman-era buildings.

There is a limited but growing awareness in the local community of the holistic nature of tourism and there has been recent investment in fair to good standard lodging establishments and restaurant capacity. Quality consistency while improving is still generally unsatisfactory for the attractions and for basic services. The attractions often lack clear information in English and seldom post French or German information. They are generally somewhat difficult for visitors without guides to locate on the street. As for the basic services, there are very few restaurants or hotels operated up to international standards. From the logistic standpoint, the road connections with Amman, with the international airport and with the other clusters along the King's Highway are good. Internal links within the cluster are centered on the town of Madaba and are good for visitor with motor transport [rental cars or taxis], but poor for independent travelers relying on public transport [busses or vans].

The weakest links are the "arrival & orientation" link for FITs who will find the street system in the town confusing and many roads to sites unmarked [or poorly marked English signage]. In addition the "attractions & activities" link is weak for cultural visitors of whom many visit only the Orthodox St. George Church and the Mt. Nebo church and then leave the cluster, spending as little as 2-3 hours in it.

### ***Wadi Rum cluster***

This unique cluster is a site-based one anchored by the famous Wadi Rum protected area that is under government control [ASEZA]. The logistics of reaching Rum are good from both the Petra and the Aqaba tourism centers [90 and 60 minutes respectively] and as a result many tours stay for two hours at sunset and depart for dinner and lodging elsewhere. There has been great progress at the visitor welcome area, which has recently opened a visitor's center with bi-lingual information and well-done interpretive information. A system has been developed to inform the independent visitor about all the options for the guide and transport services needed for touring inside the territory. As regards the success factor of arrival and orientation this is the best cluster of the four. However, as regards the offer of food and lodging services in the cluster, and the condition of the 4X4 touring vehicles, quality is inconsistent and too often far below expectations. Rum also offers a spectacular setting for a number of sports and adventure activities, but the offer of these services is extremely limited and the safety framework for them is unreliable and incomplete.

The protected territory of Rum is under the control of two Bedouin tribes whose understanding of the holistic nature of the tourism experience is growing, but is still weak as regards quality consistency. In addition, in the adjacent village of Disi on the northeast fringe of Rum, there is a collection of tented lodge operators offering dining and sleeping accommodation, many reflecting aspects of Bedouin traditions and cuisine. Quality here is also very inconsistent. For this cluster the weakest link is again the attractions & activities link.

## **C. THE INSTITUTIONAL CONTEXT**

This section identifies the key institutions active in each cluster currently or potentially. It also highlights major problems that could arise in each cluster of an institutional nature. It is intended to complement the observations and assessments of organizations that are being provided in the reports of the business development expert [W Kedrock] and the Community Based Tourism expert [M Baca]. A table at the end of the section lists key potential national institutions for each cluster and provides an approximate indication of the level of influence of each institution by cluster. The table does not include any local organizations. However, the DMGs may in fact be composed mainly of local organizations at the top tier, with a second group of associated organizations having a lesser, consultative status.

### ***Ajloun cluster***

Because the cluster's banner attraction is and always will be the ancient castle, the DoA will always play a critical role in shaping the visitor experience inside the castle.

Interpretation at the archeological sites is not usually very good in Jordan since the priorities of this department do not emphasize the quality of the information inside the numerous sites that it manages. However as regards cultural events, there is precedent both at this castle and at other sites where operators have been allowed to stage cultural events inside the premises sometimes at very high prices. Events of this kind are definitely part of the solution for the weak 'attractions' link for this cluster. A range of well-conceived, meaningful events in this outstanding structure or in the environs of it

will enable the castle to serve as a stage or setting telling meaningful stories for young and old, Jordanians and foreigners alike. It will serve as a major showcase for the kingdom's distinctive heritage.

In addition, MOTA now controls the building at the entrance to the castle grounds, the former Bonita restaurant. It can now take steps to convert it into an interpretation facility to enrich the visitor experience and extend his or her touring time on the property. An arrangement will be needed so that some organization can use different media to present these stories customized for different target populations, including school age children, foreign cultural visitors, mainstream Arab-speaking visitors and general foreigner visitors. With a longer average touring time at the castle and increased visitor volumes, the typical visitor's needs for food and beverage and shopping in the vicinity will grow. An up-to-standard visitor orientation facility could also provide orientation information on other attractions that the cluster offers and boost local businesses accordingly. This project will propose collective action under the banner of a DMG under which key stakeholders will develop solutions to these situations and improve the competitiveness of the cluster for mutual benefit.

### ***Jerash cluster***

The DoA also manages the ancient Gerasa site in Jerash town. There are serious management issues with respect to this operation such as the use of only one entry/exit gate [the South Gate] and the closure of the Museum Gate leading right into the town center, short visiting hours in the summer, poor interpretive signage, poor sanitary facilities, a mediocre display inside the visitors center, problems which in fact are not unique to this particular site. However the result is that most groups of cultural visitors are bussed away from the site and right out of the cluster after a mere 90-120 minutes on the site, totally bypassing the modern town adjacent. The outlook of the DoA remains myopic, without any regard to quality consistency or meeting visitors' expectations.

It is apparent that neither the municipal authorities nor the business community nor any CBOs have been able to improve this situation. However a good opportunity for innovation is approaching with the arrival of not only the Siyaha project but also of the Third World Bank tourism project which is proposing some new facilities in the city center to improve logistics [traffic patterns, parking management, market space for example].

The DMG approach to destination management proposed by this project will bring DoA, the municipality, MOTA, selected CBOs, the tour operators and the local business groups into one body and 'to the same table' to resolve such problems and develop solutions together. With guidance from Siyaha experts the DMG members will comprehend the collaborative character of the value chain approach and the critical need for the key players in the cluster to produce consistent, high quality experiences through this process.

### ***Madaba cluster***

The institutional picture in the Madaba cluster is quite different. There is no one prime attraction in the cluster. The DoA manages several archeological sites in the area both in the town and at remote locations [Mt. Nebo, Um ar Rassas, Mukawir]. The Franciscan Church manages the church at Mt. Nebo, and the Greek Orthodox Patriarch in Jerusalem

manages the St. George Church, the main magnet in the town of Madaba at present. Of course the municipality of Madaba runs the town itself, which forms the cluster's anchor.

A major advantage is that there is a gelling of consensus in Madaba more than anywhere else that it is the quality of the townscape and village animation that need major improvement to boost the competitiveness of the cluster. This applies both in the physical sense of improved buildings and public places, and in the operational sense of innovations for traffic management, staged events like celebrations and festivals. There appears to be a depth of understanding among many of the stakeholders interviewed for this project as to the problems and solutions faced by Madaba. This is not to say that solutions will flow quickly from the DMG once established, but the group should be able early on to identify the cluster's key weaknesses needing solutions. Equally important, there is a growing realization of the potential that the cluster holds as a touring base for the Holy Land east of the Jordan River.

The DoA's role in this cluster nevertheless is substantial since several of the sites are under its control. However the municipality will play a major role in the town proper. It is also probable that since different types of activities can be spurred in the villages of Libb, Dhiban, Rassas, Mukawir and perhaps Ma'in, the project will set up a villager outreach program for some of these villages to create needed public awareness of the implications of growing tourism.

### ***Wadi Rum cluster***

The institutional environment in this cluster is again unique for several reasons of which the first is that it is a virtually empty expanse of desert and not a town, falling under the authority of ASEZA, which is based in Aqaba. The second is that in the protected Rum territory there are two Bedouin tribes that hold much of the control by virtue of their centuries old claim to this land. They are both represented on a board that also includes the RSCN, the nation's prime environmental NGO. MOTA has been a minor player in Rum but has been instrumental in getting the new visitor information center developed. MOTA's field officer at Aqaba manages its affairs at Wadi Rum.

Because of this unique social structure of Rum society and governance, the makeup of the DMG is not so clear. The cluster area includes the protected Rum area plus some very scenic additional areas beyond, including the villages of Disi, Salha and Chakreer, and extending southward to the border of Saudi Arabia to include the kingdom's highest peak, Jabal Adaami. It may be beneficial for organizations like ASEZA, JITOA, JTGA, and the association of auto rental companies to have some associated status with the Rum DMG in order to facilitate the progressive introduction of reforms by the operators [tour guides, drivers, tent operators, etc.] at Rum in their standard operating procedures.

Possible DMG Members by cluster and level of influence

<b>Organization</b>	<b>Ajloun cluster</b>	<b>Jerash cluster</b>	<b>Madaba cluster</b>	<b>Wadi Rum cluster</b>
<b>MOTA</b>	Major	Major	Major	Moderate
<b>Municipality</b>	Major	Major	Major	Moderate [ASEZA]
<b>Dept. of Antiquities</b>	Moderate	Moderate	Minor	Nil
<b>RSCN</b>	Major	Minor	Major	Potentially major
<b>Chamber of commerce</b>	Major	Major	Major	Nil
<b>ACOR</b>	Minor	Minor	Major	Nil
<b>Womens groups</b>	Major	Major	Major	Undetermined
<b>Crafts guild, cooperatives</b>	Undetermined	Undetermined	Major	Moderate
<b>Olive producers</b>	Moderate	Moderate	Moderate	Nil
<b>Orthodox Church</b>	Nil	Dibbeen monastery	St George Ch., Bethany	Nil
<b>Roman Catholic Church</b>	Moderate [Anjara shrine]	Nil	Major [Mt. Nebo, Bethany]	Nil

*At all four clusters*

There are common issues related to getting started that each DMG will confront in each cluster where Siyaha can provide essential facilitation. Key responsibilities for each cluster DMG at inception will need to include:

- agreeing on a leadership framework: the makeup and legal status of the DMG, the selection of its director, financial matters including an expense budget and salary for any of the directors, MOTA as sponsor agency and strategic partner



- developing the cluster's logical [strategic] framework as a tourist destination to include agreeing on its vision, mission, key tourist products to develop, the specific tourist segments to target, the cluster's key interventions, agreement on an Action Plan for year 1, and the marshalling of other resources through the creation of committees, partnerships and special liaisons
- determining financial resources available for the DMG's operations and for the key interventions
- identifying officers or committees responsible for standard functions: marketing [image & branding included], training/HR development, communications & outreach, municipal relations, business development and so on
- identifying officers or committees responsible for tourism-specific functions: cultural products & events planning, B&B development, MSME support, arts & crafts support, tour guides support being the key areas

The Siyaha program will provide assistance to the communities in these clusters to get them started on a solid foundation. However, Siyaha is not a permanent partner for these groups, while MOTA is their key sponsor agency or godfather. MOTA is the key agent to coordinate the interventions across projects where two or more projects are active in the same cluster, a role that it is already fulfilling. MOTA can also facilitate dialog between the DMGs and DoA where antiquities sites are involved. Moreover MOTA may also be the best to assist where dialog is needed between the DMGs and MOPIC.

JTB will provide assistance to the cluster in terms of marketing, image and branding, and ensuring that the DMG's work in this area is consistent with that of JTB on the international level. JTB would also provide valuable guidance on quality, medium [print, website] and content as to promotional strategies and materials that the DMG would produce and use. It is entirely conceivable that a cluster such as Madaba would establish their own promotional plan with a budget relying on different media and including an innovative web outreach to target tourist segments in the EU and North America. A crucial function for the project at each cluster is public awareness and outreach. This is a function requiring great sensitivity to the fabric of the local community and most likely different NGOs will be appointed to work in each cluster according to their familiarity. There is a need to create a 'tourism culture' in each vicinity. Tasks like addressing school children, parents and youth groups, farmer cooperatives, municipal officials, tribal leaders in the Rum cluster, small shopkeepers and other such groups, for awareness purposes will be numerous and Siyaha can help the DMG define an effective outreach framework.

#### **D. IMPLICATIONS FOR THE SIYAHA PROGRAM**

The communities need to grasp from this analysis that their involvement is central to the competitiveness of the full value chain and that the community's effective collaboration with the travel industry is essential. They must perceive the tour guides and tour operators as partners and not as adversaries. The tour operators craft the packages to meet the expectations of the target types of visitors they serve so that the packages will sell. The operators will sell only those clusters offering good quality product and de-emphasize or skip entirely the others for fear of customer complaints and bad word-of-mouth. The communities are competing with each other on the basis of quality, to be included in the tour packages. For group travel the tour operators are the judges creating the packages. For FIT travelers, the visitors are their own judges [packagers] guided by the travel press [all media of it], word-of-mouth and the tour guides. It is important for the communities to realize the competitive nature of the tourism marketplace in this way. It is equally important for them to realize the collaborative nature of tourism represented by the value chain of which they are only a part.

The different initiatives suggested in this report for these clusters are intended to boost one or more links in this chain in a very visible way for the targeted visitor segments. They address primarily the link "attractions & activities" while also addressing the arrival & orientation and lodging links. It is also critical that the community leaders understand that all of these links are utilitarian or functional in nature with one exception, the "attractions & activities" one. That is because it is this link that is designed to showcase what is unique and distinctive about Jordan; it contains the critical 'bait' or 'lure' at the top of the visitor's expectation that must not disappoint.

## **CHAPTER 3 – CLUSTER ASSESSMENT FOR AJLOUN**

This is the first of four cluster assessment chapters. Each chapter begins with a cluster overview and market characteristics, followed by a Strengths-Weaknesses-Opportunities-Threats analysis, a preliminary vision statement and products for development, key stakeholders and key partners, PRA considerations, and a final section on suggested interventions containing a recommendation for demonstration projects.

### **A. CLUSTER OVERVIEW & MARKET CHARACTERISTICS**

#### ***Current Visitor Segments***

The key segments currently visiting include the foreign cultural visitors [42,000 in 2004] to Ajloun castle, Jordanian visitors to the castle [69,000 in 2004], some Arab families renting villas in the summer months [from GCC nations], and some Jordanians visiting the recently improved Ajloun Reserve [RSCN operation] for picnicking, sports and relaxation during the summer months. The Arab families visit only during the 3 summer months when the heat in the Gulf countries is the most intense and favor homes in villages to the north such as Ebbein. The Jordanians visiting the Reserve also do so during the summer months, and visitor volume is heaviest on weekends and holidays. This facility is closed during the winter half of the year.

There is a small flow of Christian visitors through this cluster, specifically to the Mar Elias hilltop church ruin [modern visitor comfort facilities; adequate road signs] and to the Virgin shrine in the heart of the nearby village of Anjara.

*[Map to be inserted of the cluster ]*

#### ***Visiting Patterns [Timing, Expenditures]***

The average visit time in the castle is under two hours [90 minutes only outside of the bus or auto], and it is reported that most groups do not even stop in the area for any refreshment, even less for any meal, choosing to move on to other points in Jordan's northern sector [Um Qais, Pella or Jerash] or to return to Amman or the Jordan Valley, just over a one hour drive away. The sole key beneficiary in the local economy is the DoA through its ticket revenue [JD 35,000 in 2004].

There are 5 (low quality) souvenir shops located in the castle's ticketing/service building related to the Jordan River Foundation. On most days of the year traffic is light and no guides are available at the site. It is probable that each year on only a few key holidays over 1,000 visitors tour the castle. The restaurants in the nearby Ajloun Hotel and Hotel Qasr Jabal capture very few castle visitors even though diners can enjoy castle views, because of their low quality. It is obvious that the businesses in the town are not catering to much tourist traffic either, which entirely bypasses them for other places.

## B. SWOT ANALYSIS FOR THE CLUSTER

- Strengths
  - Lovely mountain scenery and wooded areas such as Ajloun Reserve
  - Good reputation of area's olive industry and byproducts [oil and soap]
  - Powerful story of historic figure of Saladin and the Crusades era
  - Established reputation of Ajloun in cultural tourism circuits
    - Thanks to outstanding condition of the castle
    - Its meaning for Arab military architecture
    - Wide travel trade acceptance of value of site
  - Easy access & combinability with other attractions in north Jordan
    - Pella, Um Qais, Jerash, Damascus
  - Charm of the hilly topography and views of Ajloun town
- Weaknesses
  - Mono-product nature of the cluster and its one-stop typical touring pattern that for most visitors includes only the castle. Lack of use/no utilization of other abundant natural attractions and assets.
  - Lack of vision of business community and townspeople in creating functional linkages between the castle, the town and its broader hinterland
  - Low quality of hotel & restaurant services now bypassed by most tour operators
  - Poor traffic management in commercial streets of the town
  - Shabbiness of many parts of Ajloun town
  - Poor walking conditions at the castle for families, seniors [slippery & choppy steps, lack of handrails, lack of directions, lack of clean toilets]
  - Archeological site's total lack of relevant meaningful posted information and crafts/archeological exhibitions.
- Opportunities
  - Availability of open spaces and the idle Bonita restaurant/visitor center for events and innovative **new business ventures** – for all visitors

- **Strong potential synergy** of this Mamluk fortress to tell the story of the Saladin and Crusades themes and portrayals of his achievements– for cultural and Arab visitors
- Additional synergies with **local themes** of healthy country living, olive products, religious, hiking trails, Jerash Festival, Circassian history – for cultural and Arab visitors, for agro-tourism and ecotourism
- World bank project interest and master plan that aims to protect and enhance Ajloun as a tourism destination
- Threats
  - Inaction and continued ineffectiveness of local government producing no resolution of traffic congestion & shabbiness of town
  - Continued myopia of DoA with short visiting hours, and lack of innovative animation and interpretation inside the Ajloun castle

## **C. VISION FOR THE CLUSTER & PRODUCTS FOR DEVELOPMENT**

### *Vision, Branding & Image [Future Market Positioning]*

#### ***Preliminary Vision Statement***

*The Ajloun cluster melds the heritage of yesterday with the healthy cuisine and good quality of life ingredients of today. The Mamluk era fortress is an eloquent guardian of the valley telling extraordinary stories like the life and times of Saladin, the era of the Crusades, and the genius of ancient military architecture. The cluster's scenic slopes with their olive plantations and colorful wildflowers offer rural life experiences, resorts/chalets, and provide community-based activities like lodging, dining, hiking and agro-tourism. This area offers an environment of harmony and peace.*

Elements of the cluster's future brand and image are contained in this vision statement. Its image can draw on the very distinctive heritage in the personage of Saladin, and the majesty and meaning of the castle. The image can also feature reflections of healthy country living and eating especially evoking the area's locally produced farm products. The DMG will among its first tasks revise the vision statement, and create an image, appropriate brands and a mission statement that will direct their efforts towards achieving this vision.

#### ***Target Visitor Segments***

These are identified in the table following together with the key regions of origin, potential in the short or medium term, and level of importance as primary or secondary.

### Target Visitor Segments – Ajloun Cluster

Segment	Geo origin	Short term	Medium term
Cultural heritage	Western, Asian nations	Primary	Primary
Eco-tourism, adventure	Local & foreign	Secondary	Primary
Summer family holidays	GCC	Primary	Primary
Religious/pilgrims	Western, Asian nations	Secondary	Secondary

### ***Product Development Approach***

To attract the segments targeted in the preceding section the cluster will have to provide the following travel experiences or ‘products’ to boost its competitiveness for these segments. These proposals provide a sense of the innovation that is necessary. These are by no means the only possibilities.

- Innovations [films, multi-media] in *Edutainment* to present themes of strong interest like the Saladin story, the Crusades era, the film-maker Aqqad and enrich the value of the castle visit experience – for all cultural visitors and summer vacation visitors
- Newly created events celebrating different cultural or natural themes with cultural NGO and CBO participation with municipal support – for all visitors
- Use of the olive theme in the valley’s image and branding, through cultural events, an olive-themed trail, and through expanded production of byproducts to differentiate the Ajloun name in the marketplace – for all visitors
- Pilgrim touring itinerary linking Dibbeen’s Orthodox monastery with Anjara’s *Our Lady of the Mountain*-Virgin grotto, the hilltop Tell Mar Elias site for Prophet Elias – for pilgrim visitors
- Development of trails from the reserve to Ajloun castle and beyond to the Valley of the Mills and other areas in partnership with RSCN that has a EU fund for related socio-economic projects.

Local CBOs and businesses while not having the full know-how to produce the improved travel experiences already know a great deal about potential products and with Siyaha guidance can enter into partnerships to accomplish this. The DMG will have to lead this effort and assist in establishing such partnerships. Other possible effective themes for product development include a castles trail/them linking this cluster with Shoback, Karak and some Syrian castles, the Crusader Route, a Holy Family Route for the Christian religious visitors, a ‘footsteps of Saladin’ route, a ‘Cheeses & Wildflowers’ festival, for example.

***Improved Visitor Patterns [Visit Time, Expenditures]***

Typical touring patterns for two key visitor segments can be estimated as follows once the DMG succeeds in innovating new products as suggested above. Both reflect added activities for visitors requiring more than 2 hours time.

**Improved touring pattern for cultural tour group**

Activity	Time	Spend per person
Castle visit	2.0 hours	JD 6 for ticket
Film presentation	.5 hours	Included in ticket
Olive grove visit	1.0 hour	JD 3
Lunch in olive farm	1.0 hour	JD 7
Gratuuity, souvenir purchase		JD 3
<b>totals</b>	<b>4.5 hours</b>	<b>JD 19</b>

**Improved touring pattern for ecotourism-adventure group**

Activity	Time	Spend per person
Castle visit	2.0 hours	JD 6 for ticket
Film presentation	.5 hours	Included in ticket
Olive grove visit	1.0 hour	JD 3
Lunches in olive farm	1.0 hour	JD 7 times 2
Gratuuity, souvenir purchase		JD 3
2 nights in farm guest house or hike to reserve and lodge at reserve	2 overnights with breakfast	JD 15 times 2
Trail hiking / Valley biking	2 sessions of 5 hours	JD 3 for guide
<b>totals</b>	<b>48 hours</b>	<b>JD 59</b>

During the initial meetings, the proponents the Ajloun DMG will need to define a few model products and show them in a diagram like the two preceding ones during its strategy formulation in order to focus the community in a very practical way on the different steps that will be needed to produce these products consistently and to a high standard.

**D. KEY STAKEHOLDERS & KEY PARTNERS**

The following list presents different stakeholder groups that can be mobilized in the cluster to offer new services. All will require formal assistance and guidance.

Olive farmers – guild or coop of participating farming families, possibly with sponsorship from Jordan Olive Product Export Association JOPEA

Womens coop – seeking technical assistance for dried spices and flowers

Dairy coop – seeking technical assistance for improved dairy products

Youth group – organized corps trained for trail hiking and olive grove presentations

Shopkeepers union – organized for staging village festival

JRF – for their active role in Ebbein and their involvement at the Ajloun castle souvenir shops.

B &B operators – union of village and farm families near hiking and olive trails renting rooms and possibly joining the existing Jabal Ajloun Siyaha villa rental service  
Tour guides – further training of guides based in Ajloun [and Jerash]  
MOTA/DoA – partnership with private party for visitor center operation/concession and upgrade of the interpretation and physical infrastructure at Ajloun Castle  
RSCN – as manager of Ajloun Reserve to contribute to the creation of hiking trails in the cluster to Ajloun and other to Mar Elias, Valley of the Mills. An EU grant for socio economic projects can support the DMC. RSCN is also working with the National Forest Service for management projects at the Debeen reserve.

## **E. PRA OBJECTIVES IN RELATION TO THE CLUSTER**

These assessments have the general objective to identify the resources available in the cluster that can be tapped to produce the intended products and services for tourism. They will need to carefully question logical stakeholder groups including those specified in the preceding section, as to

- their level of interest in providing these services and getting prepared for them
- the financial and in kind resources they can easily mobilize to provide them
- any past attempts to promote tourism and causes for failure or abandonment
- the most logical partner organizations that they know
- their closeness to organizations in Jerash [possibility of combined programs]
- local resources available for training these stakeholders
- local interest in staging festivals or cultural events in towns of Ajloun or Anjara
- any past friction with foreigners [Arab or western] in the cluster and causes

If there is a local business council or chamber of commerce, it also needs to be assessed since a number of its members will be beneficiaries of the expansion in tourism. This organization would logically be a full or associated member of the DMG as a representative of the private sector. Some specific questions for these stakeholders follow below.

Farmers or womens groups: Is there a farmer's union or women's group that could take charge of the olive trail and work with JOPEA and the municipality to identify a specific walking trail linking olive groves and other farms along it to participate? Would any participants along the trail be willing to serve meals to hikers in the summer season perhaps four months of the year?

Artisans & womens groups: What local products are you producing such as wild flowers & herbs, olive byproducts [oils, soaps, wood carvings], or dairy products



and can any future trail lead to any of the homes or workshops making these products? What are the existing workshops producing and how are they doing?  
RSCN and municipal heritage officer: Where in the cluster are the ancient watermills for grinding grains or olives located and are any presentable enough to include as an exhibit along the walking trails for visitors to examine?

Youth group: Are members willing to play roles in staged portrayals and commemorations to be held in or near the castle? Are any already involved in any choirs, folkloric or song & dance activities in this cluster?

Youth group: Are members willing to take training to serve as trail guides leading visitors during the summer months and earn a fee? Are members willing to do this in the English or another foreign language?

All groups: Has your group staged any kinds of celebrations or commemorations at or near the castle in past years and if so, please describe these events.

Municipality: Is there or has there ever been any flea market or farmers market operating and if so please give details as to how it operates.

Anjara's Catholic Church at virgin's grotto: Are guides available to show the shrine to groups of visitors either pilgrims or non-pilgrims? Are any church members who speak English ready to serve as guides for mainstream [meaning non-religious] groups and also for pilgrim groups?

## **F. SUGGESTED INTERVENTIONS**

### ***Possible Demo Projects***

In & around the fortress [to be adapted to the site management plan] -

- Site interpretation enhancement program – concession award for high-imagery films or posted exhibits at visitor center & audiphones rental service [does not include castle]
- Site guide retraining program – licensed local guides & NGO [university]

Culturally themed -

- Cultural events planning capability [for street fairs, cultural events like an olive festival, commemorations of a Crusader-era victory] – local NGO or business association with fine arts academy
- Capacity building for events support [local production of stage sets, promotional items, costumes] – crafts guilds or artisan cooperatives
- Heritage reproductions [replicas] of classical objects – crafts guilds or artisan cooperatives

Other services -

- Olive trail/theme development and support for improved production and merchandizing of olive wood carved items for sale to visitors, plus preparation of

olive oil based cuisine, locally grown spices, dried flower items produced at homesteads along the trails

- Guest house/small hotel support program to increase peak season lodging capacity – local NGO or business association or in conjunction with the Jabal Ajloun tourism organization
- Creation of shopkeepers committee to improve retail offer – new business association
- Creation of a flea or farmers market serving visitors and residents – local business chamber of commerce

### ***Recommendation For A Demonstration Project (one of two)***

The first proposal, ‘site interpretation enhancement program’ for the Visitor Center at Ajloun Castle, recently opened [in the former Bonita Restaurant] by MOTA but incomplete, is recommended for the following reasons:

1. In a first phase one or two video presentations [initially in Arab and English versions] can be installed in the visitor center treating topics of strong public appeal: the castle’s architecture, the Crusades, the story of Saladin, Jordan’s trail of castles, the late film producer Aqqad, for example.
2. If done properly Jordanian, Arab and foreign visitor segments will boost attendance and revenues for the improved educational value of the visit and for its entertainment value.
3. This icon of Middle Eastern culture will achieve a tremendous gain in meaning spurring excellent word-of-mouth internationally. Versions in Arab, English, French and German languages can be provided for much improved visitor satisfaction.
4. This will achieve a synergy with the RACE chariot race event in nearby Jerash and justify an overnight in the cluster for cultural heritage visitors.
5. It will require a concession from MOTA which can be arranged in a matter of weeks or months.
6. This concession will make possible the successive introduction in later years of sophisticated innovations in interpretation including high impact video films, and night time [after 6PM] possibilities such as Light & Sound or laser shows extending the visitors’ period of stay into the evening.
7. The high commercial value of this approach will create no financial burden on MOTA or DoA or other public entity. It will be a demonstration of how a private operator can intervene in a fully compatible way at a major heritage site.

8. This program can be extended to include a growing calendar of period re-enactments and historic portrayals in the very castle creating jobs for actors, musicians, banquet managers and the like. These can occur both during the day and at nighttime and can feature major musical accompaniment.
9. Jordanian school groups can be permitted for field trips at specified times of the year and at preferential rates.
10. the concession holder can also stage themed festivals involving Ajloun town from the second year of performance further expanding tourism into the cluster.

### ***Considerations For Implementation***

#### **- BUDGETARY**

There will be no budget needed for MOTA to grant this concession except for legal counsel fees to finalize the contract. The budget for the concession holder is a private matter and in the first year could potentially exceed JD 50,000 to install high quality interpretive exhibits and plan for an upgraded system in the later phase.

#### **- TIMELINE**

If a concession competition is announced by April 2006 an award can be made by end May and visible improvements in the exhibit quality can be introduced by September of the same year. Within one year the exhibit quality will exceed that of the visitors center at Wadi Rum.

#### **- BENEFITS**

MOTA will receive a defined fee from the first year of performance. Nearby restaurants should experience a steady rise in business once new exhibits are installed and particularly once the festivals and special events are staged. From 2007 the rises in visitors and ticket sales will be measurable.

#### **- RESOURCES**

It is probable that no public sector resources will be needed. The concession holder will need to create a small staff at the visitor center that will grow as different interpretive activities expand. It will draw from the labor pool at Amman, Jerash, Ajloun and Irbid governorates.

### ***A Second Recommendation For A Demonstration Project (two of two)***

The olive trail concept [first of the 'other services'] could be developed in a relatively short span of time provided Siyaha can identify and work with a capable CBO in the area.

1. It would be a community initiative with local farmers and crafts producers taking charge of it and involving other members as trail guides and possibly cooks if meals are offered in any of the homes along the trail.
2. It would feature an interesting combination of stops at olive groves, a workshop for herb collection, an ancient grain or olive mill, a working olive mill, a soap-producing workshop and another homestead offering cooked meals, and so on.

3. JOPEA could assist this effort and eventually link it with an olive museum that they intend to create.
4. An olive harvest festival held yearly or biannually can be staged in Ajloun to raise public awareness of all the attractions in the cluster.
5. The trail could serve as a platform for others to add other services like country meals, B&B, horseback-riding, dried herbs and flowers, and even connect with a long distance hiking trail down to the Jordan Valley.
6. As a leading project for the cluster in 2006 it should have a catalytic benefit to spur interest in the cluster for other tourism initiatives.
7. A simple trail to start with could lead from Ajloun castle through olive groves over to the town of Anjara, covering several farms and offering views of the castle for most or all of its length.

#### **G. HR NEEDS HIGHLIGHTED**

Training and capacity building needs are numerous and must first of all cover the DMG for its role of leadership. All of the stakeholder groups mentioned in section D above can benefit from training for more effective performance of each organization. Municipal officials and educators will also require formal familiarization of the benefits and potential problems related to expanding tourism in the vicinity.

#### **H. IMPLICATIONS FOR BUSINESS DEVELOPMENT**

Again all the organizations or stakeholder groups cited in section D will need capacity building for business management at the micro level. This will be accomplished over a two year time frame at a maximum to give the local business community a sound basis for introduction of the new tourism-oriented services.

## CHAPTER 4 – CLUSTER ASSESSMENT FOR JERASH

This is the second of four cluster assessment chapters. The chapter begins with a cluster overview and market characteristics, followed by a Strengths-Weaknesses-Opportunities-Threats analysis, a preliminary vision statement and products for development, key stakeholders and key partners, PRA objectives, and a final section on suggested interventions containing a recommendation for demonstration projects.

### A. CLUSTER OVERVIEW & MARKET CHARACTERISTICS

#### *Current Visitor Segments*

The site of Roman *Gerasa* is the key attraction in this city, a must see for cultural heritage visitors to Jordan, after only ancient Petra. During 2004 of the total of 166,200 visitors, 94,500 were Europeans and only 11,400 were from Arab nations. This site is the main attraction in Jordan's northern zone and 82% of its visitors are foreigners, so it functions basically as an export generator. Many foreigners visit in tour groups arriving by coach on package tours. April, August and October are the strongest months. Growth in the first half of 2005 is very strong, 25.5% over the 2004 visitor volume. For the same half-year period the volume of foreign visitors is up 32% indicating *Gerasa's* definite success.

There is a nature park called Dibbeen Reserve located a 10-minute drive south of Jerash on a mountaintop where much of the local and Amman population go for summertime relaxation on weekends and holidays. It is not a major attraction for foreign visitors except for Arab families already staying in the area on summer holidays. The village of Dibbeen now has a new Orthodox Monastery Yanbou al Haya which will be receiving Christian visitors once its support facilities are fully constructed and in operation.

*[Cluster map to be inserted ]*

#### *Visiting Patterns [Timing, Expenditures]*

The average visit time in the Roman site is reported to be under two hours [90-120 minutes outside of the bus or auto], and it is reported that most groups do not stop in the town for any refreshment or shopping, even less for any meal, choosing to move on to other points in Jordan's northern sector [Um Qais, Pella or Ajloun] or to return to Amman, about one hour drive away. The sole key beneficiary in the local economy is the DoA through its ticket revenue [JD 341,000 in 2004]. Since the completion of the visitor ticketing and souvenir facility west of Hadrian's Gate, there is a procedure in place requiring groups to start their visits at this center forcing them to walk along the hippodrome for nearly 500 meters just to reach the south gate entrance to the ancient site. There are serious problems with the logistics of touring the site that a coherent management plan would resolve. Visitors needing refreshment can purchase it from strolling vendors within the ancient site, from the rest house located just outside the south gate or at the ticketing & souvenir facility. There is no need or encouragement for visitors to seek services in the modern town. The road along the site's east side also represents a barrier between the ancient site and the modern town. The average spend per foreign visitor can be estimated at JD5 for the entrance ticket plus JD 2-3 for an on-site purchase of a combination of refreshment, food or a souvenir.

The new ticketing & souvenir facility contains a variety of merchants and since the tour coaches park at this facility, visitors typically do not venture into the modern town at any point during their visit. Other than the East Baths Plaza and the carcasion/old market, there is nothing for a visitor to see in the modern town. Businesspersons from the town lament the limited benefit they derive from the events held by the famous Jerash Festival in terms of food & beverage revenues. They are waiting for the Roman Army Chariot Experience show to become fully operational to derive any new business from it.

## **B. SWOT FINDINGS FOR THE CLUSTER**

- Strengths
  - Long established reputation of Jerash in cultural tourism as Jordan's top classical site thanks to
    - The beauty of some of its vertical structures
    - The well known annual Jerash cultural festival
    - The ongoing DoA excavations and addition of a Temple of Zeus museum
    - And to wide travel trade acceptance of the site's marketability
  - Easy access & combinability with several other sites in north Jordan
    - Pella, Um Qais, Ajloun, and even Damascus
  - Addition of the RACE chariot event expected to become a regional draw
  - Completed improvements at the Roman [south] Bridge, East Baths & plaza providing an excellent functional linkage between the old town and the new one
  - Several restaurants "acceptable" but needing improvement for the tourism sector.
- Weaknesses
  - Substandard cityscape entirely lacking cultural interest and especially the extreme shabbiness and filth in open spaces
  - Lack or loss of interest of the business community and townspeople in creating functional linkages between the site and modern town
  - Poor traffic management in commercial streets of the modern town

- Poor management of the ancient site's visitor logistics via the sole public access at the south gate for entry/exit well away from the modern town
- Poor touring conditions in the site and the Roman Bridge for families, seniors [slippery & choppy steps, lack of handrails, lack of directions, lack of acceptable toilets]
- The archeological site's lack of meaningful posted information and poor quality of cultural content of the visitors center
- Poor organization, attractiveness and financial viability of the festival as well as the lacking community participation in it.
- Opportunities
  - Availability of attractive open spaces and retail spaces for **new business ventures** and events including a hostile a short 250-meter walk from the ancient site's museum gate across the historic Roman Bridge – for all visitors
  - Synergies with the RACE to portray **historic Roman themes** in connection with the chariot races in staged reenactments and entertainments [gladiators, oratory, banquets and plays] – for all visitors
  - Synergies with **local themes** of the Decapolis cities, olive & dairy products, Jerash Festival, Circassian history via a range of new events – cultural visitors
  - 2 Excellent **venues for staged events** at the South Theater & hippodrome – for all visitors
  - Strong potential **synergy with Ajloun** & its Saladin theme – cultural and Arab visitors
  - New Virgin Mary **Orthodox monastery** [*Yanbou al Haya*] and pilgrimage destination at Dibbeen– Orthodox pilgrim visitors
  - The future World Bank project presents an opportunity for medium to long term improvement of tourism potentials.
  - Significant tracts of land in Ishtafenah and the Ajloun area, owned by both the government and the private sector could host a number of chalet/health resorts and retreats for the local and regional tourists.

- Threats
  - Inaction and continued ineffectiveness of municipal government leading to continuing filthy conditions, traffic congestion & no tourist shopping offer
  - Continued myopia of DoA with short visiting hours, single site entry, misguided management [rest house obsolescence, dysfunctional gateway]

## C. VISION FOR THE CLUSTER & PRODUCTS FOR DEVELOPMENT

### *Vision, Branding & Image [Future Market Positioning]*

#### ***Preliminary Vision Statement***

*Jerash is a compact crossroads of history. It links the ancient Decapolis city of Gerasa with the modern town via an ancient Roman bridge. Through its offer of walking tours, cafes, crafts and souvenirs and even through its music festivals and historic commemorations, the city brings to life old traditions and tales, vividly portraying their meaning for today's visitor. Jerash is a cultural platform by day and by night.*

Possible elements of the cluster's future brand and image are suggested in this vision statement. The town will build up its offer of cultural activities to entertain visitors in both the ancient town and in the modern town. Its image will be transformed to reflect some refinement, traditions, and high quality of life, not only through culture and entertainment but also through wholesome cuisine and fine products from the olive industry, the dairy farmers and the area's moderate climate. These associations are appealing to all visitor segments.

The DMG among its first tasks will revise the vision statement, and create an image, one or more appropriate brands for the cluster, and a mission statement that will direct the community's efforts towards achieving this vision.

#### ***Target Visitor Segments***

These are identified in the table following together with the key regions of origin, potential in the short or medium term, and level of importance as primary or secondary.

#### Target Visitor Segments – Jerash Cluster

Segment	Geo origin	Short term	Medium term
Cultural heritage	Western, Asian nations	Primary	Primary
SAVE	Local & foreign	Secondary	Secondary
Summer family holidays	GCC	Secondary	Secondary
Religious/pilgrims	Western, Asian nations	Secondary	Secondary
MICE	Western, Asian nations	Secondary	Secondary



### ***Product Development Approach***

To attract the segments targeted in the preceding section the cluster will have to provide the following travel experiences or ‘products’ to boost its competitiveness for these segments. These proposals provide a sense of the innovation that is necessary, and by no means are the only possibilities.

- Community participation in the festival and increased awareness and activation of markets during this time.
- Innovations [films, multi-media, banquets] in *Edutainment* to tell the Gerasa story, the Decapolis system and how it evolved, the *Pax Romana*, the Crusades to mention a few themes – for western cultural & Arab visitors
- Newly created events celebrating different cultural or natural themes with cultural NGO and CBO participation and municipal support – for all visitors
- Use of the olive theme in the valley’s image and branding, through cultural events, and through expanded production of byproducts to differentiate the Ajloun-Jerash name in the marketplace – for all visitors
- Pilgrim touring itinerary linking Dibbeen’s Orthodox monastery with Anjara’s-Virgin shrine, the Tell Mar Elias site near Ajloun for Prophet Elias – for pilgrim visitors
- Increased archeological excavation programs for foreign academia and students on extended stays in local guest houses in Jerash town – for SAVE travelers and limited FIT travelers

Local CBOs and businesses will not have the know-how to produce the improved *edutainment* experiences and will need to collaborate fully with the RACE directors and tour operators to clarify their roles in such events. The DMG will have to lead this effort and assist in establishing such partnerships. Other possible effective themes for product development include a Decapolis trail, the Crusader Route, a Holy Family Route for the Christian religious visitors, the ‘footsteps of Saladin’ route, or a ‘Cheeses & Wildflowers’ festival, for example.

### ***Improved Visitor Patterns [Visit Time, Expenditures]***

Typical touring patterns for two key visitor segments can be estimated as follows once the DMG succeeds in innovating new products as suggested above. Both reflect added activities for visitors requiring more than 2 hours time.

#### Improved touring pattern for independent cultural visitor

Activity	Time	Spend per person
Orientation Video	.5 hours, afternoon start	Included in ticket
Gerasa site visit	2.0 hours	JD 7 for ticket
Tour guide-shared charge		JD 7

Roman Bridge, East baths visit extension	.5 hour	No additional charge
East baths café dinner	1.0 hour	JD 8
Gratuity, souvenir purchase		JD 3
Evening laser show & music, illuminations	1.5 hour	JD 10
totals	5.5 hours-full day	JD 35

Improved touring pattern for cultural tour group on olive-themed culinary tour

Activity	Time	Spend per person
Orientation video-visitor center	.5 hours, morning start	Included in ticket
Gerasa site visit	2.0 hours	JD 7 for ticket
Tour guide-shared charge		JD 4
<i>Olive in Ancient Times</i> special exhibit at Hippodrome	1.0 hour	JD 3
Country lunch in olive farm	1.5 hour travel included	JD 7
Olive grove & mill visits	1.0 hour	JD 3
Purchase of olive soap, oil	During visits	JD 5
totals	6 hours-full day	JD 29

The Jerash DMG will need to define a few model products and show them in a diagram like the two preceding ones during its strategy formulation in order to focus the community in a very practical way on the different steps that will be needed to produce these products consistently and to a high standard. DMG will need to work with DoA and with tour operators to understand the different dynamics of group tourists versus independent tourists. The DMG will work with the tour operators and local service providers to create innovative new events to incorporate into their packages raising the value of Jerash for the visitor.

#### **D. KEY STAKEHOLDERS & KEY PARTNERS**

The following list presents different stakeholder groups that can be mobilized in the cluster to offer new services. All will require formal assistance and guidance.

Olive farmers – guild or coop of participating farming families, oil producers association

Womens coop – seeking technical assistance for dairy products, dried spices and flowers

Dairy coop – seeking technical assistance for improved dairy products

Youth and cultural group – organized corps trained for olive groves and mills presentations and dairy farm ones

Shopkeepers union – organized for staging events in Jerash near the East Baths

B &B operators – union of village and farm families renting rooms

Tour guides – further training of guides based in Ajloun [and Jerash]

Jerash Festival –

Jerash Heritage Society – Johod

Crafts and Souvinier shops

## RACE

### Restaurant Owners

MOTA/DoA – creating a partnership with private party for improved visitor center operation

MOTA/DoA – permitting more events in the ruins such as laser show or temporary olive history exhibit

## **E. PRA OBJECTIVES IN RELATION TO THE CLUSTER**

These assessments will need to identify the resources available in the cluster that can be tapped to produce the intended themed events and services for tourism. They will need to carefully question logical stakeholder groups including those specified in the preceding section, as to

- their level of interest in providing these services and getting prepared for them
- the financial and in kind resources they can easily mobilize to provide them
- any past attempts to promote tourism in Jerash [attractions, events, festivals] and causes for failure or abandonment
- the most logical partner organizations that they know
- their closeness to organizations in Ajloun [possibility of combined programs]
- local resources available for training these stakeholders
- local interest in staging festivals or cultural events in or near Jerash town
- any past friction with foreigners [Arab or western] in the cluster and causes

If there is a local business council or chamber of commerce, it also needs to be assessed since a number of its members probably have direct experience with tourism and would be beneficiaries of any future expansion in tourism. This organization would logically be a full or associated member of the DMG as a representative of the private sector. There have been a number of past efforts to offer services in the town to lure the cultural visitors to the site, that have been discontinued and it could be beneficial to understand these past attempts to extend the visitor's stay in the town. A deeper understanding of past failed efforts will enable Siyaha to avoid the same pitfalls. Consequently, some key stakeholder groups can be questioned along the lines suggested below.

Artisans, crafts makers & womens groups: Are there any locally produced crafts, weavings or embroidery, herbs or wildflowers and the like that could be supported by a favorable Jerash image and branding signifying high quality? Are the area's fine dairy products marketed under some umbrella name?

Restaurant owners: Are you getting much lunch or dinner business from the tour groups or from independent tourists to the ancient site, and are you getting any in connection with the Jerash Festival? What steps are needed to win more of this business? Have you tried offering any kinds of paid entertainment to the tourists? Are you offering combo packages for the RACE chariot race tourists?

Shopkeepers: In the past did more tourists visit your shops in the town and what efforts have you made to lure them back again downtown? What is the needed trick to lure them back? Is it true that craftsmen and artisans have left the city to work elsewhere?

Youth groups or schools: Are there any cultural or fine arts groups or choral groups that could participate in performances and entertainment events in addition to the Jerash Festival? Let us know their capabilities.

Experienced tour guides: In past years was there at time when many visitors did enter the town after seeing the ancient site, and if so, what did they do and what did you show them?

Municipality: Have there ever been any flea markets, farmers markets or crafts markets in the past that tourists visited, and if so, where were they and why did they close down?

DoA: What is the past history of cultural events inside the ruins in addition to the Jerash Festival? Was there a Light & Sound show before or similar show that was discontinued and why?

DoA: In the past were any more gates open for visitors to enter or exit, and did more visitors then filter into the town through them?

## **F. SUGGESTED INTERVENTIONS**

### ***Possible Demo Projects***

In & around the main archeological site [to be adjusted per site management plan] -

- Upgrade, clean and protect the East Baths quarter with surroundings, organize the owners, award a concession to install interpretive information in the baths and operate an open-air café, and manage the vegetable market and shacks next door – private operator & DoA
- Open the Museum Gate so visitors can exit to the Roman Bridge [South Bridge] and easily walk to the critical East Baths in the modern town - DoA
- Upgrade the Jerash Visitor Information Center [transfer to more functional site, concession award for private operator, interpretation innovations] – private operator & MOTA
- Site guide retraining program – licensed local guides & NGO [university]
- Convert the old market to a lodging/hostile, library and service facilities, and active it during the festival as a “flee/specialty market”
- Renovate Kayed Castle for B&B or MICE.

Culturally themed -

- Privatize the Jerash Festival so that it is more professionally run and generates more collateral activity in the town, and/or for support it and bring a community component to it.
- Jerash Town touring support program [posted maps along trails, walking trail leaflet production, guide training, tour operator outreach]
- Cultural events planning capability [for street fairs, cultural events, commemorations] – local NGO or business association with fine arts academy, also to support the Jerash festival activities.
- Capacity building for events support [local production of stage sets, promotional items, costumes] – crafts guilds or artisan cooperatives, also to support the Jerash festival activities.
- Heritage reproductions [replicas] of classical objects – crafts guilds or artisan cooperatives

Other services -

- Villager lodging support program for FIT and SAVE visitors [for families with suitable city or rural homes] – local NGO or business association
- Creation of shopkeepers committee to reform shop management – new business association
- Creation of a flea-farmers market serving visitors and residents – local business chamber of commerce
- Old souq parking garage [proposed] – concession to private operator
- Launch of the Destination Management Group for project implementation [and support the “partnership committee” for the upcoming City Revitalization Project] – MOTA & JTB support

***A Recommendation For A Demonstration Project***

An open-air café can be set up in the plaza adjacent to the East Baths to create a much-needed focus of activity in the town. This forms a first step of the first proposal, ‘upgrade the East Baths quarter’ and is recommended for the following reasons:

1. It is the crucial step that will have a short and long term catalytic effect to finally draw visitors into the modern town and spur essential urban renewal in this very attractive but extremely shabby quarter.

2. Renewal of this quarter producing one or more comfortable cafes will appeal to all visitors to Jerash of whatever origin and immediately generate excellent word-of-mouth.
3. This will achieve a synergy with the RACE chariot race event with the Jerash Festival and any other cultural events giving visitors a convenient after 6PM option in the town.
4. It may not require a concession or approval from DoA if it is located alongside the antiquities rather than in them.
5. A simplified first step is to open the Museum Gate from the ancient site so visitors can exit the ancient site directly into the Roman Bridge to reach the East Baths. A 2-year concession can be awarded for café operation and installation of interpretive materials at this site.
6. the concession holder can work with other stakeholders to stage themed events in the spacious plaza next to the East Baths.

### ***Considerations For Implementation***

#### **- BUDGETARY**

There will be no budget needed for DoA [or for the municipality if in the plaza] to grant this concession except for legal counsel fees to finalize the contract. The budget for the concession holder is a private matter and in the first year could potentially exceed JD 10,000 to build an attractive light structure for the café operation, which could have seating for as many as 200 persons.

#### **- TIMELINE**

If a concession competition is announced by April 2006 an award can be made by end May in time for a café operation to be launched for the busy July-August vacation months. After the initial contract, a new award can be made in mid 2008 for a more substantial and permanent facility per a design to be fully consistent with other works to take place in the same vicinity. The first facility would be allowed only under a 'leave no trace' basis requiring a fully reversible and removable installation.

#### **- BENEFITS**

The catalytic effect of this proposal is substantial. Independent visitors would filter over into the town to inspect the East Baths site and then relax. Many groups would do likewise. Some of the nearby shopkeepers would eventually adapt their offer of goods and services to cater to the passing tourist trade. Visitor spend in the neighborhood would grow starting with food and beverage and quickly extend to retail items starting with souvenirs. Eventually arts & crafts artisans would benefit.

#### **- RESOURCES**

It is probable that no public sector resources will be needed. The concession holder will need to organize his project in accordance with the concession contract. It is conceivable that he or she will have connections to one or more tour operators or café operators.

## **G. HR NEEDS HIGHLIGHTED**

Training and capacity building needs are numerous and must first of all cover the DMG for its role of leadership. All of the stakeholder groups mentioned in section D above can benefit from training for more effective performance of each organization. Municipal officials and educators will also require formal familiarization of the benefits and potential problems related to expanding tourism in the vicinity. Another demonstration project could relate to the creation of a “flee market” in the old market. Herein is a snapshot of the JARA flee market that can be modeled.

## **H. IMPLICATIONS FOR BUSINESS DEVELOPMENT**

Again all the organizations or stakeholder groups cited in section D will need capacity building for business management at the micro level. This will be accomplished over a two year time frame at a maximum to give the local business community a sound basis for introduction of the new tourism-oriented services. If the East Baths upgrade project is adopted in 2006 it is probable that BDS services for the businesses in the immediate environs and in the old souq will be required by 2007. Public awareness is also a critical element of community engagement and readiness/acceptance of the tourism economy.



## CHAPTER 5 – CLUSTER ASSESSMENT FOR MADABA

This is the third of four cluster assessment chapters. The chapter begins with a cluster overview and market characteristics, followed by a Strengths-Weaknesses-Opportunities-Threats analysis, a preliminary vision statement and products for development, key stakeholders and key partners, PRA objectives, and a final section on suggested interventions containing a recommendation for demonstration projects.

### A. CLUSTER OVERVIEW & MARKET CHARACTERISTICS

#### *Current Visitor Segments*

Because of the variety of magnets included in this cluster it is drawing cultural tourists, religious tourists, and a small but growing number of sports/adventure-minded tourists. It is attracting both group tours and FITs, many of whom overnight in the hotels on the Dead Sea coast [about 800 rooms available] or in the town of Madaba [about 150 rooms], alternatively in Amman. For the cultural visitors Madaba serves as the gateway to the King's Highway which extends down some 150 km to Petra and which represents the Kingdom's premier touring corridor. For the Christian visitors [sometimes called pilgrims] the cluster also offers tremendous appeal in the trio of the Baptism site, Mt. Nebo for Moses, and Mukawir for St. John the Baptist. This cluster contains Jordan's part of the Biblical Holy Land and rich in traces of the later Byzantine and Umayyad Christian era. It is coming apparent in the trends that the Madaba cluster is fulfilling a dual function as gateway for the cultural segment, and also base for the Christian pilgrimage segment.

The visitor counts show extraordinary growth since 2003. Some 2004 visitor counts are: Mt. Nebo Church 119,000, St. George Orthodox [map] Church 87,000, the Baptism site 50,000 to 70,000 and Madaba Museum 10,000. The foreign visitor represents about 95% of these statistics. For the first half of 2005 growth at the various sites has risen to the 23-50% range making 2005 a banner year and attesting to the industry's growing success. The package tourist arrivals to Jordan overall compiled by the government show 75% growth in 2004 [254,000] over the prior year and this is a factor propelling these high growth rates in the Madaba cluster. A statistical summary follows.

#### Recent visitor statistics in the Madaba cluster

	2004 actual visitors	2004 actual visitors (daily average)	2005 daily average-6 months actual	comment
Mt. Nebo church	119,000	334	484	Up 46% over 2004
St. George Map church	87,000	224	377	Up 50% over 2004
Bethany Baptism site	51,000	143	141	Up 23% over 2004
Madaba Museum/ Archeological Park	10,000	28	35	Remote location



There is a small volume of sports and adventure oriented visitors hiking or cycling in the cluster on the scenic bluffs or in any of its canyons but this is a small although promising segment.

### ***Madaba Cluster Map and Attractions***

*{Twp map will be included to show the Madaba city and the cluster and the routes}*

### ***Visiting Patterns [Timing, Expenditures]***

Industry specialists describe a very short average length of stay in Madaba town with many groups seeing only the map church in the heart of town in under an hour and nothing more, proceeding on to Mt. Nebo or even directly southward to other attractions outside of this cluster. For visitors including both the map church and Mt. Nebo, the overall time on the ground in this cluster on average may not exceed two hours. Mt. Nebo is the most heavily visited site in recent years no doubt in part because of its extraordinary panorama and the seasonal pattern shows strongest arrivals volumes for April-May and October-November. The bus tourist's average expenditure in the cluster, can include two entrance tickets and perhaps a refreshment or souvenir, and is estimated to be no higher than JD8-10. This picture is changing with hotel bed capacity rising at the Dead Sea coast and in the town of Madaba itself thanks to recent construction.

Fortunately a new visitor pattern of the overnight visitor to the cluster is developing with bed capacity growing at the Dead Sea coast and in the town, mainly in commercial hotels. The average daily expenditure for such a visitor can be estimated as follows: lodging JD25, food & beverage JD20, touring fees JD20 for an approximate total of JD65. This pattern indicates more the price level at the hotels in Madaba town than that at the Dead Sea hotels which are much more expensive.

## **B. SWOT FINDINGS FOR THE CLUSTER**

- Strengths
  - Strategic location including **famed Holy Land sites** including Mt. Nebo, Bethany, Herod's palace at Mukawir among others of tremendous appeal to religious visitors (particular Roman, Byzantine and Umayyad eras)
  - Strategic location at the **gateway to the King's Highway** which forms Jordan's premier touring corridor leading to its flagship attraction of Petra all the way to Aqaba.
  - **Panoramic scenery** over the Dead Sea and Jordan Valley reinforced by the new panoramic center.
  - Growing **charm of the town of Madaba** serving as the cluster's anchor
    - Old town core with growing number of picturesque streets

- Expanding tourist-oriented lodging and restaurants
- Emerging tourist quarter in the neighborhood of Saraya Police
- Easy **proximity to the Queen Alia International Airport** [20 minutes] and Allenby Bridge [30 minutes] two crucial entry points to the kingdom
- **Entrepreneurship** of local business people to innovate new products for tourists such as hiking, biking, scooter rental and events and festivals, as well as the hospitable/hospitality mindset, the human resources, and the availability of the active Vocational Training Center in Madaba.
- **Diversity of resources** including natural assets, historic urban heritage, religious sites, and spectacular scenery appealing to all
- Weaknesses
  - Lack of informative, printed maps to allow for self-guided touring across the cluster by hiking, bike or auto. Lack of a clear city map for independent touring in the town center.
  - Difficulties for FITs to easily circulate between the cluster’s attractions without hired guides or rental autos.
  - Limited choice of tourist quality restaurants and hotels in the town.
  - Lack of entertaining activities after 6pm in the town such as museums or galleries, concerts, festivals, carnivals, commemorations and the like.
  - Poor traffic and parking management and pedestrian signage in the innermost streets of the town jeopardizing pedestrian traffic.
  - Lack of capacity of people in villages like Libb, Mukawir or Main to provide basic assistance in English to visitors for directions, advice or for purchases
  - Key attractions and service facilities and MOTA/DOA lack in interpretation and service facilities (at the visitor center, archeological parks, DOA museum and Mkawer visitor center).
- Opportunities
  - Madaba can develop as an “east of the Jordan” **base for Holy Land pilgrimages** and offer highly meaningful pilgrim experiences at different sites – for religious visitors
  - Madaba can grow as a **gateway to the King’s Highway** touring corridor leading to Petra as its hotel offer expands – for cultural visitors

- It will preserve its architectural heritage through new **B&Bs and Guest Houses** and other tourist businesses in the old houses [“Levantine Guest Houses” brand] – all visitors
- Madaba can emerge as a **center for sports & active tourists** for hiking, biking, hang-gliding, and similar activities – sports & adventure tourists linking Mkawer to Main and Mujib.
- Community members want to deepen the cluster’s offer of crafts and products, excursions and events through synergies reflecting **religious & historic themes** of Christ, Moses & John the Baptist, the Crusades, plus **natural themes** of the Rift Valley and its unique geology, wine and olive production– cultural and religious visitors
- Completion of the Dead Sea Panoramic Complex (museum, restaurant, conference rooms, gift shop and view) calls for an **operator** to run it as a multi-purpose center for cultural, religious, MICE, and sports & adventure visitors and also for school groups.
- The cluster will cater to a **mix of types of tourism** making it a less vulnerable destination in adverse times while cutting investor risk. The local tourism market can also be better harnessed taking advantage of Amman’s proximity.
- The World Bank project, once initiated and executed, promises to focus on the city regeneration. Similarly, the E.U.-funded projects at Umm Rassas, Lehun, and the branding of the King’s Highway (brochure) will support the development of the cluster. In addition, foreign investment (housing and boarding school) projects will support the development of local and regional tourism to the cluster.
- Investment in new roads from Madaba – Main – Panorama complex – Dead Sea and possibly from Mkawer to/from the Dead Sea provides critical connectivity to other attractions and improves the convenience of routes and access to the product.
- Threats
  - Inaction and continued ineffectiveness of local government will not resolve the **traffic congestion** in the city center at peak periods.
  - Failure of local organizations to stage more daytime and after 6PM events such as a regular farmers market or flea market won’t resolve the **lack of after 6PM activities**.
  - **Prolonged conflict** in Palestine may cause a severe downturn in pilgrimage traffic to Jordan and specifically to this cluster. Should the

Allenby Bridge remain closed for a long time this would shut a major gateway for visitors.

- **Prolonged closure** of the Dead Sea Panoramic Complex through government inaction will deprive the industry of a good cultural asset and attraction.

## C. VISION FOR THE CLUSTER & PRODUCTS FOR DEVELOPMENT

### *Vision, Branding & Image [Future Market Positioning]*

#### ***Preliminary Vision Statement***

*The Madaba cluster will grow into a convenient base for discerning tourists exploring different cultures, admiring ancient heritage sites and enjoying the scenic attractions around the Dead Sea. For the cultural and religious tourists Madaba, known as ‘the City of Mosaics’ can serve as a handy touring base near several famous religious sites such as Mukawir, Mt. Nebo and the Bethany baptismal site. For the sports-minded visitor the cluster offers multiple options for active touring and extreme sports across the panoramic ‘Dead Sea Highlands’ and Wadi Mujib areas. For all visitors the Madaba cluster is becoming synonymous with fine dining, interesting crafts and superb panoramas.*

The stakeholders in this cluster are beginning to grasp the opportunity to serve as a base for pilgrimage tourism, and will need to work with JTB and JITOA to improve on the images and brands already formulated to appeal to this special market, which comes mainly from the US/Canada, and the EU. JTB already is doing much work in support of pilgrimage traffic and already prominently features the Madaba cluster in the ample promotional materials that are already in use. Slogans in use include “the Sunrise of Christianity” and “Vatican designated pilgrimage sites”. With respect to cultural tourism, the city is using the apt slogan “City of Mosaics” among others. The DMG among its first tasks will develop its own vision statement, and may find it optimal to create an image and one or more appropriate brands for the pilgrimage market and a different one for the cultural and sports markets.

#### ***Target Visitor Segments***

These are identified in the following table together with the key regions of origin, potential in the short or medium term, and level of importance as primary or secondary.

#### Target Visitor Segments – Madaba Cluster [including Dead Sea]

Segment	Geographic origin	Short term	Medium term
Cultural heritage	Western, Asian	Primary	Primary
Religious/pilgrims	US/Canada & EU	Primary	Primary
Sports & adventure	Western, Asian, local	Secondary	Primary
Health & wellness	Western, Arab,	Primary	Primary

	Asian		
MICE meetings	Western, Arab, local	Primary	Primary
Summer vacation	GCC	Secondary	Secondary

### ***Product Development Approach***

The cluster has the opportunity to expand and diversify tourism on a sustainable basis but it must work on several problem areas to accomplish this with different stakeholders. The proposals provide a sense of the innovation that is necessary among different players, and by no means are these the only possibilities.

#### *City Center*

- A committee is needed to stage new events celebrating different cultural or natural themes with cultural NGO and CBO participation and municipal support. This will help solve the problem of lack of life in the town after 6PM.
- Leverage the World Bank’s project aims and vision to to create a tourist quarter or historic district near the Saraya building, and development of momentum and an organized effort to spearhead the adaptive reuse of old buildings to house new businesses providing tourist services.
- Together with input from downtown businesses and residents the municipality will institute measures to smooth traffic and parking patterns in highly touristed streets during peak periods to promote heavier pedestrian usage and eventually to make possible more outdoor cafes and cultural events.
- Better use of MOTA/DOA assets to create an integrated experience with product and services provided by the private sector.

#### *Cluster Level*

- Because of the cluster’s dramatic scenery and topography, it can create a platform for sports and adventure-minded visitors by providing a safety and information framework that operators can use to expand the offer of such services up to international standards.
- The harmonious growth of pilgrim traffic will rely in part on the enlightened coordination of efforts by the Franciscan Custody, Orthodox patriarch and the Roman Catholic Church and Baptism Commission with local municipal offices and the travel trade. A mechanism is needed to provide this coordination.
- Arts and crafts are a significant strength of Madaba, however, much has to be done in terms of improving the quality, relevance and diversity of products (crafts or otherwise), and improve the retailing experience. Specific opportunities include more retailing on archeological sites, retail spaces at the Baptism site, and at Nebo. Addressing competition from imports is another key issue.

- Coordination and cooperation with tour operators and guides in order to support the development of new products and services is necessary.

The DMG will have to comprehend the basic problems involved and set up structures such as deputies, task forces, committees or boards to secure financial and technical resources from different sources and to get solutions.

### ***Improved Visitor Patterns [Visit Time, Expenditures]***

Madaba's role as a touring base for pilgrims is depicted in the itinerary shown below. It assumes group arrangements and an all-inclusive price that includes local transportation, meals, visa charges and so on. It illustrates how Madaba can even serve as a base for combo pilgrimages to Jerusalem since its road links are good and processing conditions at the Allenby Bridge are improving. Five of the seven nights are to be spent in Madaba in this example and no night is spent in Amman. It is making the case that a genuine pilgrimage can begin not in Jerusalem but in Jordan for a few days, proceed to Jerusalem, and then terminate once again in Jordan whereby this cluster hosts the pilgrim not once but twice. All five religious sites sanctioned by the Vatican are included in this itinerary. Another day or two could be added for Umm Rasas and Petra in relation to Bizantene-related tourism or Umm Qais

#### **Improved touring pattern for pilgrim group one week circuit with Jerusalem**

day	Activity	overnight	Spend per person
1	Arrival by air through Amman airport	Madaba	JD50
2	Map church., Mt. Nebo, Moses spring, crafts	Madaba	JD50
3	Ma'in spa swim, Dead Sea Panoramic sunset	Madaba	JD50
4	Bethany baptism service, Mukawir sunset	Madaba	JD50
5	Holy Sepulcher, various churches	Jerusalem	JD60
6	Bethlehem, Shepherds grove, crafts & concert	Jerusalem	JD60
7	Tell Mar Elias, Anjara Virgin shrine, Ajloun castle, Mt. Nebo farewell prayer service & concert	Madaba	JD50
8	Depart via Amman airport	travel	JD25
	total		JD395

The itinerary below illustrates the role of the Madaba cluster as gateway to the King's Highway touring corridor for the cultural visitor, in which 6 of the 9 overnights are scheduled into Madaba. Amman hotels are avoided sparing the visitor the cost of the big city hotels and time lost in city traffic.

#### **Improved touring pattern for cultural tour group King's Highway to Petra**

day	Activity	overnight	Spend per person
1	Arrival by air through Amman airport	Madaba	JD50
2	Map church, Mt. Nebo, Bethany baptism, crafts	Madaba	JD50
3	Ma'in spa swim, Dead Sea Panoramic sunset	Madaba	JD50

4	Amman full day tour with Jerash option	Madaba	JD50
5	Um ar Rassas mosaics, Wadi Mujib Reserve, Dana Reserve	Karak	JD50
6	Karak castle, Shoback castle	Petra	JD65
7	Petra full day tour	Petra	JD65
8	Little Petra half day, Mukawir sunset	Madaba	JD50
9	Full day at leisure for shopping, concert	Madaba	JD50
10	Depart via Amman airport		JD25
	total		JD505

The FIT agenda and the sports and adventure segment would have different patters of visitation.

The Madaba stakeholders and entrepreneurial tour operators will need to define a few model products such as these and show them in diagrams during its strategy formulation in order to focus the community in a very practical way on the different steps that will be needed to produce these products consistently and to a high international standard. DMG will need to work with the tour operators to understand the different dynamics of group tourists versus independent tourists, and the different needs and expectations of cultural versus pilgrimage tourism.

The DMG will work with the tour operators, municipal officials and local service providers to create innovative new community events to incorporate into their packages and promotions that will entertain the tourists during their free time.

#### **D. KEY STAKEHOLDERS & KEY PARTNERS**

The following list presents different stakeholder groups that can be mobilized in the cluster to offer new services on a non-profit or commercial basis. All will require formal assistance and guidance to grasp the purpose of any initiatives that target sustainable tourism. Since villages like Mukawir, Libb, Ma'in, Dhiban and Hisban are included in the cluster; organizations based in such locations are also candidates as players in this program's initiatives. While there are many clubs and associations active in the area that might be able to contribute to some tourism activity, the writer became aware of only the following ones.

Christian Ladies association & similar – some are active in different types of arts and crafts and could launch new products such as herbs or dried flowers.

Madaba Heritage Society – A definite player in creating a viable historic district in Madaba town, working with ACOR and a funding agency.

Arab Choir group – Choirs and cultural groups ssuch as this while not 'key' will have their role in commemorative events staged at different places in the cluster.

Retired military band – A musical resource to contribute to various events in the cluster.

Scouts or nature club – With training the members can form a corps of trained hiking guides and monitor visitor usage along the trails in the canyons and bluffs overlooking the Dead Sea.

shopkeepers union – Their initiative is essential to improvements to retailing in the city center, both physical and in terms of activities and special events.

B &B or guesthouse operators – There is much interest in creating such small businesses and many townspeople see potential in this family-run type of lodging.

Tour guides – Guides based in Amman also cover the Madaba cluster and vice-versa so any guide retraining may have to be offered only to a limited segment of the guides.

Jordan River Foundation – Is active in both Mkawer as well as Umm Rasas working with the community on crafts, the management of the Mkawer visitor center, as well as the Ostrich farms in Umm Rasas.

Johod – the Jordan Hasemite fund is active in Madaba, and works with many CBOs.

They are also partners with the Ministry of Planning in the development of the craft center in Nebo.

Crafts Association.

Churches – the Catholic, Fransiscan and Greek orthodox churches have some key tourism assets, archeological lands, some lodging capacity, and an interest in the religious tourism product line including the Baptism site.

RSCN – active in Mujib, Mkawer, and possibly at the Panorama/Main area, RSCN has interest to support the camping, hiking and adventure product line in the area whereby it can leverage the Mujib reserve operations and attraction.

Chamber of Commerce and Trade.

DoA – It has a major role in improving interpretation at the archeological sites, museums, and the management of the mosaic school. The situation at the Bethany site (managed by a private commission that includes DOA representation) in some respects is extremely lacking and requires concerted action with the churches operating there and MOTA and JVA.

Madaba Municipality – It is a key player in introducing successive reforms in the city center agreed by the business community and by the churches to create the unhurried, charming oriental urban environment that the marketplace so much wants to find there.

MOTA – Its role is major in coordinating the different donor and world bank programs in the cluster and lobbying for supportive actions from other central government bodies affecting the Siyaha program's initiatives. MOTA also has a role in enabling the newly found Heritage law to operate in Madaba that is rich in Heritage.

Governorate – the governorate has pledged support to the tourism sector, and is a key partner in the implementation of policies and actions to support the cluster development.

## **E. PRA OBJECTIVES IN RELATION TO THE CLUSTER**

These assessments will need to identify the resources available in the cluster that can be tapped to produce the intended range of urban changes, themed events and services for leisure and tourism. They will need to carefully question logical stakeholder groups including those specified in the preceding section, as to

- their level of interest in providing these services and getting prepared for them
- the financial and in kind resources they can easily mobilize to provide them



- any past attempts to promote tourism in any of the towns in the cluster [attractions, events, festivals] and causes for failure or abandonment [especially in Mukawir, Libb, Ma'in, Dhiban and Um ar Rassas vicinity]
- the most logical partner organizations that they know
- their closeness to any national organizations in Amman [possibility of combined programs]
- local resources available for training these stakeholders
- local interest in staging festivals or cultural events in Madaba town or other locations like at Mt. Nebo, the Dead Sea Panoramic Complex for example
- any past friction with foreigners of any origin in the cluster and causes
- any past friction with immigrant workers [like Egyptians or Syrians] in the cluster and causes
- 

The Madaba chamber of commerce also needs to be assessed since a number of its members probably have direct experience with tourism and would be beneficiaries of any future expansion in tourism. This organization would logically be a full or associated member of the DMG as a representative of the private sector. The Madaba Heritage Society could be another partner provided it is willing and has the capacity to respond to the challenges.

It would also be ideal to question CBOs active in the lower sector of the cluster along the north rim of Wadi Mujib, in villages like Dhiban, and Saliya, which could serve as trailheads for visitors descending into the valley, or Mayfaa [Um ar Rassas] which has both the sheltered mosaics and a crafts workshop.

The more significant stakeholder groups can be questioned along the lines suggested below.

Artisans, crafts makers & womens groups: Are there any locally produced crafts, weavings or embroidery, herbs or wildflowers and the like that could be supported by a favorable locally inspired image and branding signifying distinctiveness and high quality?

Artisans, crafts makers & womens groups: Are any of you interested in operating small hotels or guesthouses in Madaba or in any of the nearby villages? Do any of you have empty bedrooms in your homes that could be rented to visitors for extra income? Are you willing to undergo training to provide this service to foreigners who may speak no Arabic language at all?

Restaurant owners: Are you getting much lunch or dinner business from the tour groups or from independent tourists to the various sites in the cluster, and are you getting much business in connection with religious or other holidays? What steps are needed to win more of this business? Have you tried offering any kinds of formal entertainment such as singing, dancing or even a play or other

performances? Are you willing to cooperate with tour operators and offer them a special menu?

Shopkeepers in Madaba town: In the past did more tourists visit your shops in the town and what efforts have you made to lure them back again? What is the needed trick to lure them back? Have many craftsmen and artisans have left Madaba to work elsewhere?

Shopkeepers in Libb, Ma'in or Mukawir: Are tourists visiting your shops and do you know how to attend to them sufficiently in English? Would any kind of training enable your employees to serve them better?

Youth groups or schools: Are there any cultural or fine arts groups or choral groups in the cluster that could participate in performances and entertainment events or are they all from Amman? Let us know their capabilities.

Experienced tour guides: What must downtown Madaba do to get the tourists to stay longer and spend more money after touring Mt. Nebo and the map church?

Municipality: Have there ever been any flea markets, farmers markets or crafts markets in the past that tourists visited, and if so, where were they [in Madaba or villages] and are they operating well? In what facilities are musical performances held in the cluster in addition to those held at Mt. Nebo's Church?

DoA: Can the Mosaic School provide short paid courses in English or Arabic for visitors seeking instruction on making mosaics?

MOTA/DoA: Can private firms be hired to improve and operate sites like Herod's Palace at Mukawir or the mosaic church at Um ar Rassas?

MOTA: Does the ministry understand that the cluster will need better road signage in English, better road policing and improved traffic management in Madaba town for it to safely take on the role of gateway and touring base?

MOTA: In the interest of supporting pilgrimage tourism to Jordan, can MOTA help set up a chartered joint body to provide responsible management at Bethany fully sensitive to the pilgrims' needs through both the physical plant as well as mode of operation there?

MOTA: Is the ministry willing to set up a bi-national border committee with the Israeli authorities to work to improve conditions at Allenby Bridge for tourists with a view to facilitating reforms like 24-hour operation as they become feasible?

## **F. SUGGESTED INTERVENTIONS**

### ***Possible Demo Projects***

Madaba town -

- Creation of "Madaba Town Touring Map" for free distribution to independent visitors promoting touring by foot to all attractions - local NGO or business association
- Guest house/small hotel support program to increase community lodging capacity through adaptive reuse of historic houses – local NGO or business association with assistance of ACOR

- Tour guides retraining program to improve capabilities and visitor satisfaction.
- Creation of shopkeepers committee to improve retail offer and stage events – new business association
- Creation of a flea-farmers market serving visitors and residents – local chamber of commerce or municipality
- Transfer of visitor information desk to central location near map church and reuse of existing facility for retail/restaurant use, alternatively upgrade the visitor center with cluster information and provide some basic services that take advantage of the garden space there.
- Creation of a culinary school for tourists in a local restaurant offering instruction in English in local cooking techniques using regional products
- Upgrade of archeological park with link to the Mosaic School and the development of attractions, activities and services.

Miscellaneous proposals -

- Award of concession to build and operate a 25-room Eco-friendly lodge in Lahoun overlooking Wadi Mujib – MOTA to manage process
- Launch of the *Destination Management Group* for project implementation – MOTA & JTB support
- Cultural events planning capability highlighting themes of local interest of appeal to visitors – chamber of commerce with JTB advise
- Events support program for production of sets, costumes and promotional support items by local crafts guilds or artisan cooperatives
- Creation of "Dead Sea Highlands Touring guide" map & booklet for distribution to independent tourists based in Madaba – local interest with JTB advise
- Creation of "Dead Sea Highlands Hiker's Guide" map & booklet for distribution to independent tourists based in Madaba and hiking to attractions – local publisher
- Creation of "Jordan Bible Lands Touring Guide" map & booklet for distribution to independent tourists based in Madaba and visiting religious sites – local publisher
- Camping and hiking experience from Mkawer to Main and Mujib in cooperation with RSCN that is prepared to develop the trails and conduct training. RSCN is also engaged with JRF to partner in the operation of the visitor center.
- Bicycle or Vespa rentals to visitors for independent touring – local small business

- Concession award of Dead Sea Panoramic Complex, to reactivate this unique resource and establish a full activities program for domestic and foreign visitors
- Operation of a Dead Sea Highlands touring shuttle linking key sites to promote independent touring – union of local businesses
- Umm Rasas ostrich farm to become an attraction and barbeque center to host tourists. Work in Umm Rasas will support the EC project and has been requested by them.

### ***A Recommendation For A Demonstration Project***

Three recommendations are made for demonstration projects. The simpler one is the first proposal under the Madaba town interventions, the “Madaba Town Touring Map” to show clear walking itineraries, all attractions with capsule descriptions and opening hours, to be revised annually. A portion of the cost could be supported by local advertisements so it could be distributed free of charge around the hotels in Madaba, the Dead Sea and even in Amman and Petra and at the Allenby Bridge. A grant could fund a part of the cost and MOTA or JTB could provide limited design expertise and branding guidelines. An online version would be available for download and a cluster web site can be developed. The local chamber of commerce could sponsor this. If successful this approach could be perceived as a quick victory for the DMG and applied also in other cities like Jerash, Irbid, Salt, Zarqa and Aqaba. These would all bear a seal of approval by MOTA/JTB.

The second recommendation centers on developing the Mkawer sunset experience and having occasional catered events in Mkawer, improving transport to the castle, and developing a hiking and experience in cooperation with JRF, RSCN, tour operators and guides.

The third recommendation is also for the Madaba town, supporting Guesthouse and B&B operation in old structures. Because there is already strong support as voiced at the Siyaha workshops and since ACOR already has catalogued several old buildings that could be adapted, it may be feasible to put the project on a business foundation within a year and get several units rehabilitated. A feasibility study may already exist.

Siyaha can launch perhaps two such buildings in Madaba as a demonstration or approach, to stimulate other conversions both in the Madaba cluster and elsewhere such as Salt, Jerash or Ajloun. It could also launch the guesthouse company as a cooperative or company providing technical advice, promotional benefits and possibly a booking service. The nature of the guesthouse as a business is different from B&B operation which is much simpler. From old buildings guesthouse development is probably more feasible since it does not infringe on family privacy the way a B&B operation does. Key considerations for the venture follow below.

### *Considerations For Implementation*

#### - BUDGETARY

This is the central question as adaptation may cost JD 50,000 or easily more per building depending on condition and size. A model business plan for a guesthouse can be prepared and adapted to evaluate specific available structures and different variations such as with a restaurant, with no restaurant but with a retail shop, or art gallery for example. The Siyaha program would have to arrange for technical advice and set some standards.

#### - TIMELINE

Within six months the first two buildings for conversion should be identified and an award system set up to turn them over to the most capable operator according to agreed terms. Depending on the duration of works they could be operable within a year of the start of the program. Strict performance clauses will have to be included in the contract to ensure the intended benefits.

#### - BENEFITS

The catalytic effect of this proposal is intended to be substantial. This is intended to lead to the creation of a charming quarter or historic district where different leisure and tourist-oriented businesses will be concentrated and rents and incomes will rise over the long term as many other structures are improved. This district in Madaba would be located around the Saraya police station and form an extended touring corridor southward from the map church and the attractions clustered near it. The guesthouse projects would serve as catalysts to start the process.

#### - RESOURCES

Research will be necessary to identify sources of grant or low interest debt funding for the physical works on the buildings, and also for training of the intended operators in international standards. There have already been many conversions of old buildings in Jordan.

### G. HR NEEDS HIGHLIGHTED

Training and capacity building needs are numerous and must first of all cover the DMG for its role of leadership. All of the stakeholder groups mentioned in section D above can benefit from training for more effective performance of each organization. Municipal officials and educators will also require formal familiarization of the benefits and potential problems related to expanding tourism in Madaba and the different villages in the cluster. Any training needs related to the guesthouse development would be handled under a customized program.

### H. IMPLICATIONS FOR BUSINESS DEVELOPMENT

Again all the organizations or stakeholder groups cited in section D will need capacity building for business management at the micro level. This will be accomplished over a two-year time frame at a maximum to give the local business community a sound basis for introduction of the new tourism-oriented services.

## **CHAPTER 6 – CLUSTER ASSESSMENT FOR WADI RUM**

This is the last of four cluster assessment chapters. The chapter begins with a cluster overview and market characteristics, followed by a Strengths-Weaknesses-Opportunities-Threats analysis, a preliminary vision statement and products for development, key stakeholders and key partners, PRA objectives, and a final section on suggested interventions containing a recommendation for demonstration projects.

### **A. CLUSTER OVERVIEW & MARKET CHARACTERISTICS**

#### *Current Visitor Segments*

There is a dearth of information on the different segments of visitors to Wadi Rum [statistics follow below]. The largest segment is made up of general sightseers on day visits, mainly the cultural segment, reaching Rum from either Petra or Aqaba. Most are believed to stay 2-3 hours before moving on to Petra or Aqaba for the night. The group tours are visiting for the purpose of general sight-seeing at the newly built visitors center and in the reserve, especially in late afternoon for the sunset. A minority will overnight at one of the camps in Disi as arranged by the tour operators. Groups tend not to use the camps inside the reserve itself, which are considered too substandard and low capacity. The volume of day visitors is growing in part with the increased number of cruise ships docking at Aqaba and with the increased numbers of tourists arriving by air into Aqaba Airport, spurred in part by the ‘open skies’ policy. There are also visitors lodged at Eilat who come for day trips. There have also been attempts to start a tourist excursion on the Ma’in-Aqaba phosphate railroad but this has not yet been operated. There are all forms of cultural tourism going to Rum for sightseeing, especially at sundown.

Rum also attracts in very limited numbers additional segments including the sports/adventure segment which will take journeys of one or more days with hired guides and transport, whether by 4X4 vehicle, horse or camelback. There is some technical climbing [rappelling] going on and some hang gliding and hot air balloon riding, but very limited. Some tour operators stated that this market is very underserved and undeveloped because of the poor quality of the services provided, both in terms of the condition of the equipment and vehicles, and in terms of the quality of the explanations and assistance provided by the local operators. Some private operators are offering trips into the territories to the north and south of the reserve where they can visit the Fort Bayard filming compound [north of Shakriyeh] and Jordan’s highest peak Um al Adaami [1,845 m on the Saudi border to the south].

In the statistics the pattern is of extraordinary growth with daily average arrivals growing from 71 in 2003 to 384 in 2005, a fivefold increase. This is due in part to the better-organized ticketing system now operating at the visitors center, and to the growing use of the highly informative and attractive new visitor center at the gate to the reserve; the overall recovery and growth of the tourism industry since the lull in 2000-2002 also played a part. The average daily visitor volume in 2005 [half year] exceeded 380 persons, five times the volume 2 years earlier. The Europeans make up 84% of the total arrivals; Jordanians make up a mere 5%. Hence, this reserve functions as an export product since 95% of its visitors are foreigners.

Recent visitor statistics in Wadi Rum Reserve [MOTA]

Actual arrivals	actual visitors	actual visitors-daily average	Europeans only-daily average
2005 6 months	70,000 up 2.7 times over 2003 level	384 up 5.4 times over 2003 level	323 up 6.0 times over 2003 level
2004 6 months	27,000	147	119
2004 12 months	66,000	182	148
2003 12 months	26,000	71	54

*Visiting Patterns [Timing, Expenditures]*

One pattern for the day visitor is the sunset visitor, either in groups or traveling independently, who visits the visitor center, inspects the exhibits, arranges transport inland, takes the drive mid afternoon staying to see the sunset, and returns to the visitor center to move on to overnight in Disi, or in Aqaba or Petra. Some will stay for dinner, others not. Without the dinner the average spend per person is limited, perhaps JD2 for ticket, JD2 for the guide, JD5 for the shared vehicle and JD4 for a souvenir of some kind, adding up to JD13 per person on a day trip.

Visitors choosing to stay for an overnight in a camp at Disi may pay JD25 more for dinner, the overnight and breakfast, equaling JD38 for the entire visit, touring included.

**B. SWOT FINDINGS FOR THE CLUSTER**

SWOT for the Wadi Rum Cluster

- Strengths
  - Unequalled **desert beauty** highly symbolic of the Kingdom and of desert life and now readily recognized by the travel trade.
  - A **variety of resources** in the reserve and vicinity including mountains, some antiquities, camps full service and minimal, some wildlife and flora, a railroad connection, a fortress and plaza at Rum Village, and a few villages and an oasis area at Disi.
  - **Easy road access** to the camps in Disi and to hotels in Aqaba and Petra making possible multiple itinerary options.
  - Strong interest of cooperatives and tour operators to **broaden the product range** and offer new adventure and sports services both in the reserve and in surrounding areas

- Some events, such as “Desert Heat”, camel racing, and horse endurance racing occurring in Rum attract regional and international visitors.
- The construction of the new visitor center as a state of the art facility, and the creation of unique handicrafts, and an emerging Bedouin pharmacy and other new products, services and venues in Wadi Rum visitor center and village.
- Weaknesses
  - **Lack of meaningful interpretation** for visitors of the interesting Bedouin culture and traditions in many of its facets such as cuisine, economic activities, living off the desert, the camel’s lifecycle, family traditions, and so on.
  - **Disappointing standard** of Rum’s core 4X4 experience [many junky vehicles], and of the lodging and foodservice at the camps [threadbare and unhygienic sometimes]. Older aged visitors are virtually excluded from the significant Rum experience beyond simple sightseeing because of the basic, uncomfortable nature of the services.
  - **Lack of activities after 6pm** to entertain the visitor in terms of music and dance, folklore, astronomy, or nature walks.
  - Reluctance of some tour operators to sell Rum to any but the hardy tourist because of **negative feedback** about touring services.
- Opportunities
  - Rum can serve as a living **showcase of Bedouin culture** and traditions based on additional well-conceived activities of the local tribe members – for cultural visitors
  - Rum can introduce additional high value **adventure and sports activities** up to international standards of service and safety – for adventure & sports visitors
  - Entrepreneurs are keen to offer new lodges, themed railroad trips, hot air balloon rides and **other services at the periphery** of Rum’s protected area at no harm to its resources – for all visitors
  - Lack of night time activity in Aqaba (and Petra), and creation of night time activities in Wadi Rum could imply strong demand that could be taken advantage of.



- Threats
  - **Absence of major improvements** in basic services of transport, food, entertainment and lodging leading operators to continue to undersell Rum – all visitors
  - General **complacency of some tribal leaders** and cooperatives and their resistance to making quality improvements in the services they provide – all visitors

## C. VISION FOR THE CLUSTER & PRODUCTS FOR DEVELOPMENT

### *Vision, Branding & Image [Future Market Positioning]*

#### ***Preliminary Vision Statement***

*The Wadi Rum cluster will position itself as a unique open-air museum portraying its rose red natural beauty, and its spectacular geology for the cultural tourist, and offering a variety of adventure and sporting experiences for the sports-minded. It will also tell the human stories of the prehistoric, Nabataean and modern times and serve as a living stage revealing the secrets of desert life and Bedouin culture.*

The words ‘portray’ and ‘reveal’ are used in this vision statement to convey the critical need for the operators to create a selection of planned, high quality activities in the form of portrayals by day and by night [at banquets], to vividly illustrate aspects of the local heritage to visitors and even entertain them. Some ideas are:

- Bedouin traditions such as marriage, treaty-making, trading, nomadic life
- The Arab Revolt and the saga of T. E. Lawrence
- The lifecycle of the camel, the “ship of the desert”
- Flora, fauna and the geology of Wadi Rum
- Trading patterns of ancient times and Rum’s epigraphy
- Bedouin cooking lessons
- Tent technology and time-proven survival techniques in the desert
- The story of the Bedouin Camel Patrol

The travel trade is making heavy use of images of Rum in current publicity and in fact arousing the curiosity of the traveling public that cannot be met. For this reason there is a heavy emphasis on the culture and history of Rum in this approach to product development. The completion of the exhibits and video at the visitors center is a great step in the right direction, but more ‘polished and rehearsed’ activities will go a long way

to raise visitor satisfaction and spending. This vision also calls for a foundation for the safe and sustainable expansion of both culturally oriented and sports activities in the area.

### ***Target Visitor Segments***

These are identified in the table following together with the key regions of origin, potential in the short or medium term, and level of importance as primary or secondary.

#### Target Visitor Segments – Wadi Rum Cluster

Segment	Geographic origin	Short term	Medium term
Cultural heritage	Western, Asian	Primary	Primary
Sports & adventure	Western, Asian, local	Secondary	Primary
Religious/pilgrims	US/Canada & EU	Secondary	Secondary
Cruise	EU	Secondary	secondary

The cultural segment will remain the strongest for both day visitors and for stay-over visitors. With the needed product development efforts the sports/adventure operators can expand their offer of activities and attract rising numbers of enthusiasts, mainly from the EU. Being a highly technical type of tourism ASEZA, JTB and Jordan’s operators will have to carefully target the right niches to expand this segment successfully. The religious segment will be significant with its post-pilgrimage extensions to Wadi Rum and in some cases then on to Egypt’s Sinai. Finally, Rum will receive rising numbers of cruise passengers on shore excursions as traffic of cruise ships into Aqaba’s port grows.

### ***Product Development Approach***

The cluster has the opportunity to expand and diversify tourism on a sustainable basis but it must work on several problem areas to accomplish this with different stakeholders. The proposals provide a sense of the innovation that is necessary to generate more linkages and economic benefits, and tell the stories as suggested in the vision statement.

#### *Relating to the activities & attractions link*

- A committee is needed to design and **stage new events** celebrating different cultural or natural themes as suggested in the listing of themes above. These will require artistic compositions or scripts, costumes and the use of props including even camels, horses, Bedouin guards, tents and goats. This will help solve the problem of lack of daytime activities and of information on the local traditions.
- A similar effort to formulate events is needed for **night-time activities** which could include culinary lessons, music and dance performances, poetry recitations, star gazing with a Bedouin guide, and similar activities.
- Innovative **transport** via camel trains or the phosphate railroad can be arranged, for both daytime and nighttime excursions.

- A **safety framework** clarifying lines of authority, communication and appropriate actions in response to accidents and emergencies needs to be formulated with the relevant agencies and operators at Rum if any high value and high risk sports and adventure options are to be offered at Rum on a sustainable basis.
- Review of the adventure and sports market segment needs and development and marketing strategy/plans for the key organizations operating in this segment including adventure guides and the Royal Aero Sports center (that is based in Aqaba with operations in Disi).
- In the medium to long term, the connection and promotion of the archeological site of Hallabat (the Abbasid capital) some 30 km from the Wadi Rum area, provided the site is well presented, interpreted, and managed.

*Relating to the services link*

- To improve the **food and beverage** offer, food preparation and presentation need to be improved, and cooking lessons the Bedouin way can be offered along with the sale of food items and souvenirs from the desert.
- The drivers cooperatives will need to adopt and enforce a **quality code** to better manage the upkeep, licensing, and insurance of their fleets of 4X4 vehicles to improve overall safety, the comfort level for the passengers, and the hospitality abilities of the drivers to provide better commentary and earn higher fees. Much of the cultural segment consists of senior travelers who are not hardy and require such comforts. Driver training, classification and licensing is a related issue. The resulting ownership, management and operations structure of the 4x4 should be reconsidered/studied. A fleet maintenance and renewal strategy should be studied, with possible tax exemptions from the GOJ for new fleets.
- The camp operators especially those at Disi can undertake a **quality improvement campaign sanctioned by a board of inbound tour operators** that will introduce visible improvements for the overnight accommodation in the camps: quality of blankets, pillows, tents, sanitary facilities, and improve operating standards as to attentiveness and hygiene. A classification/standards should also be introduced.
- Both the Disi camp operators and the two cooperatives operating at Rum all need training to **improve their organizational skills** to better serve their memberships relating to them the critical need for quality improvements, and to better support their interests in future negotiations on pricing of services.

The DMG will have to convince these key stakeholders of the basic problems hindering Rum's competitiveness and their role in putting to work the right solutions. The solutions are participatory, calling for a mix of specific structures such as task managers, task forces, committees or boards to create the political will and secure financial resources

from different sources. ASEZA funding should be leveraged, and the Wadi Rum Natural Reserve community fund should be utilized in a way to benefit the community.

***Improved Visitor Patterns [Visit Time, Expenditures]***

Two examples of full itineraries are shown below, one for an adventure group traveling by camelback, a second for a short stay group tour to/from Aqaba. Prices are per person and assume shared charges for bus transport, guides and vehicles inside the reserve, and shared sleeping accommodation. The most expensive overnight is for day 1 because of the fine quality tented hotel sleeping two for JD150 half board. For the 4-day itinerary evening activities are identified.

**Improved touring pattern for an adventure group 4 days at Wadi Rum**

day	Day Activity	Night activity	overnight	Spend per person
1	Camelback trek from Tutun, Bedouin attendants, sunset hike	Stargazer walk	Tent hotel	JD75
2	Camelback trek to Disi, short hike at sunset	Bedouin wedding show	Camp in Disi	JD60
3	Sunrise hike, half-day 4X4 tour including Burdah natural bridge, camel lifecycle talk	Music & poetry	Camp in Disi	JD60
4	half-day 4X4 tour, easy climb, sunset rail trip with dinner aboard	Rail trip to Aqaba at sunset		JD75
	total			JD270

The itinerary below represents how the value of the short-stay visitor can be improved. This reflects the improved 4X4 experience, a festively served dinner at a traditional restaurant [perhaps in the old fortress in Rum village] and a Bedouin wedding show afterwards. This product is suitable for impulse purchase by visitors in Aqaba on other business but wishing to sample for half a day desert life.

**Improved touring pattern for half day tour group at Wadi Rum**

hour	Activity	Spend per person
2PM	Arrival by bus to visitor center, museum & shop	JD20 base fare
3-6	4X4 tour of reserve, visit of Tamudic inscriptions, see basic Bedouin tent, short hike to sunset spot	JD20 4X4 charge
6-9	grilled dinner at Rum village (or at a Bedouin camp) restaurant & crafts center [old fortress], Bedouin wedding show, shopping for crafts	JD30 dinner charge JD10 souvenir
9PM	Depart for Aqaba or Petra by bus	JD80 total spend

Other models are possible including longer treks up to 7 days, and even themed train rides to Aqaba by day or by night.

## **D. KEY STAKEHOLDERS & KEY PARTNERS**

The situation in this cluster is simpler in this cluster because the population is relatively low and two tribes have already formed cooperatives and are dominating the commercial activities in the protected area. There are also several local and regional investors interested in operating high quality/high end camping experiences. There is already a board governing activities in this area headed by ASEZA and this board potentially could sponsor the DMG and provide partial funding for it. Other possible stakeholders and partners are listed below.

**Rum & Disi cooperatives** – These are crucial players in achieving quality improvements for visitor services offered within the reserve. They need clear incentives and guidance.

**Disi population** – This is the labor pool for expanding services offered in the area. Their willingness to undergo training [both the men and women] for different service positions [tourism livelihoods] is crucial.

**Disi camp operators** – This is a population targeted for greatly improved performance. Ideally they would be organized in a union or business grouping to arrange the capacity-building programs, to create the repertory of themed entertainments, and negotiate favorable grant or loan conditions to fund such activities and any upgrade investments.

**Artisans** – Local artisans and perhaps womens groups can be tapped to produce decorative items for vehicles, public facilities, banquet settings and for the entertainment repertory. These interventions will engage these groups from their earliest stages.

**Tour operators** – The JITOA association could create a committee to deal with the specific Wadi Rum matters on behalf of all their members. This is logical since 95% of Rum’s visitors are foreign and the inbound tour operators are demanding these major product improvements. JITOA can consider a certification scheme for businesses or individuals completing agreed programs.

**Aero sports club** – offering sky diving, gliding, ballooning and other activities from their base in Aqaba, and their division in Disi. The club requires support in the development of their service offering and marketing plans.

**RSCN** – a member of the Wadi Rum council, RSCN embodies excellent knowledge and expertise in nature reserve management, camping and adventure, and community participation. They also play a role in marketing and operating several eco-tourism attractions in Jordan.

**Surrounding communities** – some of the surrounding communities are active in agriculture related activities, including for example the keeping of cattle. This new found expertise could be leveraged for camel farming that could support the Wadi Rum community.

**ASEZA** – This is the key government authority for the sector in which Wadi rum is located. It will have a strong role for upgrading Rum. ASEZA also plays a critical role in the marketing of tourism to Aqaba, that is being positioned with the slogan “the Oasis and beyond; Red Sea, Wadi Rum and Petra”. ASEZA tourism division also plays a role in product development.

**Shakriyeh & Salhiyeh villagers** – They also stand to gain jobs as private operators active in peripheral areas expand their operations and needs for workers.

**DoA** – It has a role limited to ensuring sustainable conditions at Rum’s dispersed archeological sites.

MOTA – Its role is major in coordinating the different ASEZA and donor programs in the cluster. It will also partake in the creation of some form of DMG for the cluster through the involvement of its Aqaba field officer.

Because of the limited capacities of the local communities, it may be optimal for both ASEZA and MOTA to participate in Rum's DMG along with the cooperatives, the two other villages, the Disi camp operators and inbound tour operators.

#### **E. PRA OBJECTIVES IN RELATION TO THE CLUSTER**

These assessments will need to identify the resources and attitudes available in the cluster that can be tapped to produce the intended range of urban changes, themed events and services for leisure and tourism. They will need to carefully question logical stakeholder groups including those specified in the preceding section, as to

- their level of interest in providing these services and getting prepared for them. Siyaha may need to illustrate higher quality products to the cooperatives so that they see the need and take an active interest in this program.
- the financial and in kind resources they can easily mobilize to fund programs and improvements.
- any past attempts at cultural and entertainment innovations in the cluster [attractions, events, festivals] and causes for failure or abandonment
- local interest in staging new festivals, competitions or cultural events in Disi town or other locations
- the most logical partner organizations that they are willing to work with
- their closeness to any national organizations in Amman [possibility of combined programs]
- local resources available for training these stakeholders
- any past friction with foreigners of any origin in the cluster and causes
- any past friction with immigrant workers [like Egyptians or Syrians] in the cluster and causes

The more significant stakeholder groups can be questioned along more specific lines suggested below.

Artisans, crafts makers & womens groups: Are there any locally produced crafts, weavings or embroidery, that are distinctive and could serve as decorative items for public places [camps, restaurants] and touring vehicles or for the trains? Is there an ongoing program that could be expanded to produce such items?

Artisans, crafts makers & womens groups: Are any of you interested in creating a repertory of cultural portrayals relating themes of local history and Bedouin traditions? Each portrayal needs to be scripted, and all props and costumes made and actors trained as performers in Arabic and in English. Are you willing to join such a project and get training to provide this service to audiences of foreigners who may speak no Arabic language at all?

Restaurant owners in Disi and Rum: Are you willing to cooperate with tour operators to develop several special menus and to provide festive banquets to entertain tourists? Have you tried offering any kinds of formal entertainment such as singing, dancing or even a play or other types of performances?

Outfitters & sports operators: Is the profession satisfied with the present arrangements for responding to emergencies and performing urgent evacuations? Can any sports be offered on an expanded basis if the management and safety framework were up to international standard? What organization in Jordan could sponsor the upgrading of this industry?

Outfitters & sports operators: If any special area inside the reserve or outside of it could be reserved as a recreational zone for hang-gliding, climbing, mountain biking, horseback riding, dune buggies and so on, which one should it be?  
Youth groups or schools: Are there any cultural or fine arts groups or choral groups in the area that could participate in performances and entertainment events? Let us know their capabilities.

Cooperatives guides and drivers: To justify higher fees would you undergo training in all terrain driving skills, first aid, emergency response, way-finding, English language, natural history of Rum? What do you think about instating a system for certifying desert touring drivers as apprentices, junior drivers, licensed drivers, senior drivers for example? Would you work with RSCN or the Desert Guides Society [Wilfried Colonna] to design a program to progressively improve your abilities?

Cooperatives 4X4 owners: To justify higher fees would you consider a vehicle inspection system rigorously enforced to motivate you to keep the trucks in better condition? Would you also consider adoption of a vehicle classification system [standard or superior] allowing the top class of vehicles [the most comfortable] to charge higher fees? Also is your cooperative arranging some common costs such as group liability insurance coverage, health insurance, bulk purchasing of some supplies to benefit all members?

Cooperatives 4X4 owners: In view of the fast rising visitor figures to Rum, nearly 400 persons per day in 2005, do you meet regularly with JITOA to discuss problems of peaking or crowding at Rum's visitor center especially when the cruise ships send you several busloads at one time? Are you working on ways to manage this demand and spread it more evenly for all to benefit? How do you

feel about becoming a salaried employee or working on an hourly basis on a vehicle not owned (in full or in part) by yourself, i.e., by the visitor center).  
Municipality of Disi: Have there ever been any flea markets, farmers markets, camel auctions or crafts markets in the past that people from all over attended? Are there any competitive games that the people of Disi stage each year for fun such as camel races, horse races or displaying falcons or hawks?

ASEZA & MOTA: In view of the fast rising visitor volumes to Rum, and the rising need for staff, do you have a plan to train the young in the Rum villages in a variety of basic skills such as desert flora & fauna, hospitality skills, first aid, basic survival skills, way-finding, basic English vocabulary, in order for them to consider careers in the Aqaba region such as drivers, camel masters, tour guides, reserve monitors, climbers and so on?

Disi & Rum tribal chiefs: Is solid waste management under good control or are people leaving trash strewn in public spaces where there is no collection system to remove it? To have tidy towns healthy for everyone visitors and locals alike, can we work on this problem? Would you and your people be willing to undertake a program for environmental excellence that you could be proud of?

## **F. SUGGESTED INTERVENTIONS**

### ***Possible Demo Projects***

Bedouin themes -

- Disi Camps lodging & foodservice upgrade [menu redesign, hygiene standards, service style, souvenir menus, cooking illustrations] via cooperative hospitality committee to arrange necessary training and technical assistance.
- Design of a set of Bedouin themed portrayals for evening entertainment [at dinner services] revealing traditions and folklore with training for participants from the Rum area villages
- Design of a set of Bedouin themed activities for daytime entertainment illustrating traditions such as desert survival skills, the camel lifecycle, economic activities, tent technology, Bedouin weavings, the Arabian stallion and so on
- Staging special events with portrayals and reenactments on themes such as the Arab Revolt, trading caravans, tribal conflict & reconciliation plus an annual Bedouin Festival
- Creation of camelback Bedouin Police Corps to monitor & facilitate reserve activities
- Creation of a flea-farmers market serving visitors and residents, with local chamber of commerce



- Creation of a camel-trading market event or camel race at Disi village
- Other services -
- 4X4 driver retraining & vehicle certification, maintenance and upgrade program via cooperative driver committee with assistance of outside organization such as the Royal Automobile Club
  - Establishment of a certified multilingual elite guide corps serving foreign visitors with assistance of RSCN or academic organization
  - Creation of an international standard emergency management & preparedness framework for all of the Rum operators offering touring, sports, adventure and transport services within and outside the reserve
  - Creation of a Rum Adventure & Sports committee to include the cooperatives at Rum and JITOA and perhaps the Royal Automobile Club to promote racing competitions [camels, horses, dune buggies, 4X4 vehicles, hang gliding etc.], safety standards & training
  - Creation of cruise committee for the two Rum cooperatives with JITOA assistance to work on improving logistics and additional products for cruise passengers
  - Business planning & organizational skills development for local organizations like the two cooperatives

### ***A Recommendation For A Demonstration Project***

A first recommendation is the first one listed in the Bedouin themed proposals, which focuses on upgrading the quality of lodging and foodservice offered in the area, most specifically at the group of tented camps in Disi. A program can be developed to improve both the physical plant of these camps, and also the quality of service that the staff members provide making possible price increases that the market will accept. A lodging specialist can define

- Program of improvements for safety and comfort in the bathrooms, sleeping quarters and dining areas enabling older persons to stay more comfortably. Different possible improvements can be budgeted.
- Program of decorative enhancements featuring items made in the region [towels, placemats, curtains, wall hangings, table centerpieces, dried wood & flower arrangements for example]. These items can be made available for sale to customers.
- Training in foodservice hygiene and presentation and in first aid for the foodservice staff.

- Design of more interesting culinary repertoire making full use of local foods and dishes while incorporating some international dishes. Innkeepers will learn how to handle alcoholic beverages for different groups of foreigners.
- Design of artistic menus serving as souvenirs as well as of locally made placemats, napkin rings, spice containers, candle holders, incense burners using local materials and motifs.

A program of this sort could be defined within one month with the collaboration of the Jordan Restaurants Association with the help of a cooking school in Aqaba and an experienced organization that works with artisans. The camp owners may elect to form a committee to set this up, and establish quality standards and all the components of the program. Each owner would choose from the range of options the training and types of materials they wish to introduce into their camps to individualize and beautify them according to their budgets. Once the upgrades are in place producing the visible improvements, the owners will be in a position to negotiate higher prices with the tour operators for the upcoming season. With a higher standard of foodservice a full dinner service with light entertainment could be priced in the range of JD20-25 per person.

Two other proposals can be considered for a demonstration project. One addresses a structural problem hindering the expansion of sports and adventure activities in the cluster, namely the proposal introducing *international standard emergency management & preparedness framework* for all of the Rum operators. The operators at Rum including the two main cooperatives would form a committee or task force to focus on this problem. However it is not a simple one and requires collaboration with several government agencies involved with security, environment, military matters and justice. However once accomplished, the insurance industry would welcome this effort [lowering premiums] and JTB and Jordan's tour operators would be able to publicize the high safety standards in effect with foreign tour operators. This same framework could be duplicated in the Dead Sea Highlands area or in any of the other areas popular with sports and touring on the east flank of the Wadi Araba. This proposal requires regulatory reform from several institutions, which would take some time to institute.

A second, much simpler proposal is the creation of a *cruise committee at Wadi Rum* to improve the logistics of handling sometimes hundreds of visitors descending from one vessel, and to tailor new products for the cruise clientele. There is plenty of space at Wadi Rum to accommodate very large numbers of visitors sustainably if the exercise is properly planned and monitored. Without such planning Rum risks refusing touring programs that with careful advance planning it could handle without taxing its resources. A cruise committee could ensure that peak demand is handled smoothly alerting all the service providers about the planned heavy arrivals and ensuring that the workload [and income] is distributed fairly.

The third proposal is the Bedouin sunset/night experience.

### ***Considerations For Implementation***

The first proposal on lodging and foodservice upgrade is profiled below because the need for it is high and once accomplished it would generate a positive market response and increased income for the service providers through the higher lodging and menu prices.

#### **- BUDGETARY**

There are two components to this proposal, one focusing on the physical state of the camps including their safety and their aesthetic appeal. The other component focuses on the staff and is intended to raise their skills to serve foreigners. There may be funds available for training in existing programs for SME support and also for physical improvement. This needs to be researched. There should be no need for foreign expertise for any of this work.

#### **- TIMELINE**

The project could be fully defined within one month with the first training cycle to begin within two or three months. Assessments of the physical plant at the participating camps could be completed within two months and upgrade packages defined within three including identification of financing options for the owners. If the program were approved by Q1 2006, much of it could be accomplished by Q3 enabling the camps to increase their prices by end 2006 for the 2006/7 winter season if not earlier.

#### **- BENEFITS**

Menu prices and lodging prices could increase significantly over the following seasons as the positive word-of-mouth improves the reputation of these camps. A JD25 overnight stay could rise to JD30-32. If the types of entertainment are introduced in parallel with this program, menu prices could be increased even more. With such improvement the tour operators will be more willing to book groups into the camps than they currently are.

#### **- RESOURCES**

Research will be necessary to identify sources of grants or low interest debt funding for the physical works on the camps, and also for training of the staff in international standards. A master chef could be hired from Aqaba or Amman to develop the higher standard menus. There are a number of large restaurants that could perform remote training in Disi or at Rum. With respect to decorative and service items for the camps a broad range of such items is already available in Jordan so there is no apparent need for importing any of them. Local designers will rely mainly on domestically produced items. Researching of other camping offerings in Africa for example, would benefit the local industry.

### **G. HR NEEDS HIGHLIGHTED**

Training and capacity building needs are numerous and must first of all cover the DMG for its role of leadership. The two cooperative sponsored by the tribes in this cluster also can benefit from training in running their organizations more professionally. Any training needs related to the camp upgrades have already been explained above. Other types of training called for in the proposals include programs for artisans, drivers, police, tour guides, cultural and authentic Bedouin experience products all of which would be handled under customized programs.

### **H. IMPLICATIONS FOR BUSINESS DEVELOPMENT**

The two cooperative located at Rum, the groups of artisans and the Disi camp owners and private sector investors are the key stakeholder groups in need of BDS services.

## CHAPTER 7 – ADDITIONAL CONSIDERATIONS FOR DEMONSTRATION PROJECTS

Two additional proposals are suggested as generic ones since they are generally applicable to all of the clusters. They could be undertaken in a coordinated manner to cut costs and ensure high quality.

### TOURING MAPS WITH ADVERTISING

One proposal that would produce very visible evidence of an early success by the local stakeholders is the publication of a touring map supported by local advertising and containing all attractions and all key food and hotel locations clearly marked. This is the same idea as the one recommended as the ‘Madaba Touring Map’ and the Madaba map could serve as a prototype for the other clusters. JTB or JITOA with their knowledge of what the visitors’ needs are, could create the template and work with each local business group or DMG to get the first batch designed, funded through local sponsors, printed and distributed perhaps free of charge.

It could feature Arabic/German on one side, and English/French on the other, and contain information not only on all the main attractions and hotels and restaurants, but also on crafts shops, bookstores, galleries, ATM locations, banks, bus stations, car rental agencies, key petrol stations, emergency telephone numbers, dates of key holidays and festivals and so on. This is a very typical map produced in many destinations worldwide for the needs of both group tourists and independent ones. Website versions of these maps can also be posted on Internet sites for easy download anywhere in the world. An official endorsement of JTB, JITOA or other such organization would be idea.

In the four clusters the following versions of maps could be prepared:

Possible types of touring maps

Cluster	Item	users
Ajloun	Touring Map of Ajloun town and castle area [with inset of Anjara town]	Independent tourists on foot and auto
Jerash	Touring Map of Jerash town and antiquities site [with inset of region with Dibbeen, Anjara, Ajloun, olive mills]	Independent tourists
Madaba	Touring Map of Madaba town	Tourists on foot
Madaba	Touring Map of the Dead Sea Highlands with hiking trails	Tourists with transport
Wadi Rum	Touring Map of Wadi Rum with detail for Rum, Disi and Shakriyeh villages	

### FOODSERVICE UPGRADE PROGRAMS

The recommendation for foodservice and lodging improvement for the Disi camp operators in fact could be made for other clusters. Many foreigners find the offer of food in Jordan, particularly outside of Amman, too limited and lacking interesting dishes. A

broader offer of dishes will make a one-week or ten-day stay more enjoyable for the tourist. Moreover a dinner that is festively served or accompanied by light entertainment, even if it offers only standard fare, will be more appreciated. For this reason within six months a project of this kind in any of the cluster could produce higher menu prices to reflect

- Improved design of culinary dishes to reflect traditions and local products
- Improved design of attractive menus that could serve as souvenirs
- greater use of locally made items in the décor for dining rooms and place settings

### **ITINERARIES IN THE MAKING-A SIGN OF THINGS TO COME**

If the touring maps are prepared, the ones for Madaba, Ajloun and Jerash could make mention of two exciting itineraries in the making, an olive one that highlights the fine foods produced in the region including olives, dairy products, herbs and wines. A second itinerary is the biblical one linking the Christian religious sites of the Madaba cluster with those in the Ajloun cluster. Once the touring maps are prepared, the DMGs can then take up the tasks to set up the itineraries.

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