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C4 Develop MICE Sector Strategy- Assessment Report

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ECONOMIC GROWTH THROUGH SUSTAINABLE TOURISM PROJECT

C4 Develop MICE Sector Strategy- Assessment Report

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EXECUTIVE SUMMARY

JORDAN FROM THE INSIDE-OUT

Primary Infrastructure:

- The Kingdom of Jordan has a total of 18,652 hotel rooms, of which 63% correspond to 4 and 5 star categories. The majority of rooms in Jordan are concentrated in the capital (55%), followed by Aqaba (20%), the Dead Sea (11%), and Petra (10%).
- There are 74 venues in Jordan with adequate capacity to host all types of meetings including three stand-alone convention centers (two located in Amman and one in the Dead Sea). The 71 hotels represent a total of 11,721 guest rooms (57% in Amman, 17% in the Dead Sea, 10% in Petra, and 16% in Aqaba).
- Expected meetings industry developments in Aqaba could be a powerful marketplace signal about Jordan's developing meetings industry significance.
- The current infrastructure is good quality and adequate for current and short-term projected meetings industry needs.

Connectivity:

- Jordan's airports have solid capacity, operating 4.96 million confirmed seats through 34,201 flights arriving in 2014 through 38 airlines, arriving from 36 countries.
- Domestic air connectivity between Amman and Aqaba is limited and inconvenient.
- Public transportation between and within destinations in Jordan is not optimal, requiring attendees to depend on private transportation which can be expensive.
- According to the Jordan civil aviation authority, high tax rates and fees for international flight arrivals in Jordan's airports, inhibiting international route development to support increased meeting industry competitiveness.
- Jordan's connectivity, while adequate for current demand, is expensive and constrained, putting Jordan at a disadvantage relative to its competitive set.

Industry Leadership and Operation:

- There is an acute need for a national organization or business unit that consistently promotes and sells Jordan as an international meetings and events destination.
- The Jordan Tourism Board ("JTB") has historically focused on leisure marketing activities featuring the whole country and not its individual destinations. There is currently no direct sales (call to action) initiative in place, only brand positioning. While a National Tourism Strategy formally exists, implementation has been slow and inconsistent.
- JTB budget allocations to attract and promote international events is small and inconsistent.
- The Jordanian meetings industry is not effectively organized. Stakeholders frequently pursue their own individual interests rather than collaborate around the development and delivery of a common vision which contributes to the industry's limited marketplace success.
- A lack of continuity of governmental programs and inconsistent government leadership (13 Tourism Ministers in 10 years) has fostered little or no direct government investment or policy support for meetings industry development in Jordan.
- Jordan's meetings industry workforce lacks widespread internationally-accredited training which inhibits development of a meetings industry "mindset", as distinct from leisure travel, to enhance global meetings marketplace credibility and the overall destination brand.
- Jordan's lack of meetings industry leadership and a dedicated organization is perhaps its most significant area of challenge and opportunity in order to improve overall industry performance.

Social and Business Diversity:

- Jordan is an economically and politically stable country yet this element remains largely misunderstood in the marketplace.
- Jordan has the ability to deliver relevant and compelling local content experiences to enhance the delegates' experience as well as support the business objectives of the meeting for stakeholder organizations.

- Jordan is an acknowledged regional leader in medical, pharmaceutical and the humanities with a loyal group of supportive local leaders interested in helping bring more international events to their country.
- Compared to its regional competitors, Jordan offers great diversity of locally authentic tourist products and experiences.
- Jordan’s social and business diversity is a compelling but largely untold element of Jordan’s marketplace value proposition.

JORDAN FROM THE OUTSIDE-IN

- Jordan’s primary external challenge is the market’s lack of knowledge about its meetings industry value proposition, its socio-political reality and its authentic Arab experiences:
 - There is an international perception that Jordan is an insecure country and that the political crises of neighboring countries affect Jordan in the same way;
 - Jordan lacks a definitive and consistently projected meetings and event industry “story” (value proposition); and
 - Jordan can deliver a consistently authentic Arab experience that is very distinct from its competitors.
- Jordan has a renowned international reputation for incentive travel experiences.
- Competitor destinations are more expensive but offer governmental support (GCC countries) and more “destination animation”. While some other destinations are less expensive, they do not offer the rich authentic Arab experiences that Jordan can deliver.
- Jordan’s lack of a convention bureau makes it difficult for buyers to consider it as a meetings destination (particularly the perceived lack of a “one stop shop” for information about the country).
- Prior to 2011 Jordan marketed itself in conjunction with other countries (Lebanon, Syria, Egypt or Israel). The decision to market Jordan independently will generate a better long-term position for itself.

**SWOT ANALYSIS
PRIMARY FACTORS SUMMARY**

S	Strengths <ul style="list-style-type: none"> • Modern and sufficient infrastructure for meetings and events with full array of global brands. • Excellent incentive travel positioning. • Authentic and compelling local content for delegates’ experience. 	W	Weaknesses <ul style="list-style-type: none"> • Marketplace security misperception • Lack of national industry leadership and collaboration • No consistent marketplace effort to support the meetings industry • Insufficient and expensive air connectivity • Lack of industry education and accreditation
O	Opportunities <ul style="list-style-type: none"> • Create a national meetings industry organization • Promote cultural richness and potential to provide content for meetings and events. • Promote Jordan independently from neighboring countries as part of strategic communications plan • Business potential from pharmaceutical, medicine and humanities disciplines. 	T	Threats <ul style="list-style-type: none"> • Competition can outspend and out discount Jordan. • Security misperception could escalate if not addressed. • Continued government tax grabs • Lack of specialized Meetings Industry could taint destination as unsophisticated in the meetings and events marketplace.

A full SWOT analysis is included in Chapter One covering the following topics: infrastructure, connectivity, leadership/operations and social diversity.

INTRODUCTION

In this first document about the development of a comprehensive strategy for the Meetings and Events Industry in the Hashemite Kingdom of Jordan, the objective is to create a clear vision of the capabilities, advantages, limitations and scopes of the country and for its key destinations that are able to host international congresses, exhibitions and conventions.

In order to cover all these elements, the following actions were undertaken:

1. Review of secondary sources in order to compile a report regarding the global, national and local contexts of tourism in general and of the meetings industry in Jordan. In the bibliography there is a list of all the documents and statistics that were consulted.
2. In-depth interviews with key stakeholders of the meetings industry in Jordan and in the marketplace (national business leaders, Jordanian Government, education sector, Jordanian meetings and events industry stakeholders):
 - Hotel executives (hotels with capacity to host meetings).
 - Executive leaders of Exhibition and Convention Centers.
 - Destination Management Companies (DMCs), meeting planners and receptive travel agencies' owners.
 - Public officials and international agencies operators related to both the tourism and Meetings Industries.
3. Deploy an online survey with current and recent meetings industry clients and attendees in order to understand their experience and get their feedback.
4. Review of information processes and documentation reflecting the scope of Jordan's meetings industry: its institutional structure, human resources capabilities, and related topics.

Consistent with the international market, in this report we will refer to the “meetings industry” in order to group congresses, conventions, fairs, exhibitions and incentive trips in the current global industry vernacular. In Jordan, industry stakeholders still use the MICE term (which stands for Meetings, Incentives, Conferences and Events). In recent years, meetings industry international organizations have suggested the change so as to be more inclusive.

This document consists of two chapters, divided in two sections: The first section of the first chapter analyzes the secondary information and statistical data that influences or determines meetings activity in Jordan (square meters, hotel rooms, available air seats, among others). The second section of this chapter describes the main findings from in-depth interviews and surveys made with key stakeholders from the meeting destinations in Jordan as well as from site inspections made to hotels and convention/exhibition centers. The groups engaged in this process include: the Jordanian government, education and national business leaders, Jordanian meetings and events industry stakeholders, current and recent meetings and events industry clients, recent meeting and event attendees to understand their experience. This section also analyzes the current position and considers difficulties and situations that would have to be resolved in order to attract more meetings to Jordan. A SWOT analysis is included, as well as an analysis of Jordan's competitive set, including regional tourist and meeting industry performance indicators.

The second chapter includes a review of secondary data sources that while not a direct determinant of meetings industry performance, are important to understand the general context in Jordan. Finally, this chapter also presents an analysis of tourism in the world today including visitor arrivals, foreign currency revenue, hotel trade and accommodation prices.



1. JORDAN'S MEETINGS INDUSTRY PROFILE

1.1 INDICATORS AND SECONDARY DATA

1.1.1 Infrastructure

According to the Jordan Tourism Board, as of 2012 there were 74 venues in Jordan with adequate capacity to host meetings and events: three convention centers (two located in Amman and one in the Dead Sea), with the rest being hotel-based infrastructure (3, 4 and 5 star)¹. The three convention centers represent a total theater set up capacity of 8,744 people, and a banquet set up capacity of 8,030 people.

The 71 hotels represent a total of 11,721 guest rooms (57% in Amman, 17% in the Dead Sea, 10% in Petra, and 16% in Aqaba), 294 meeting spaces, aggregated theater capacity of 29,822, and aggregated banquet set-up capacity of 18,646.

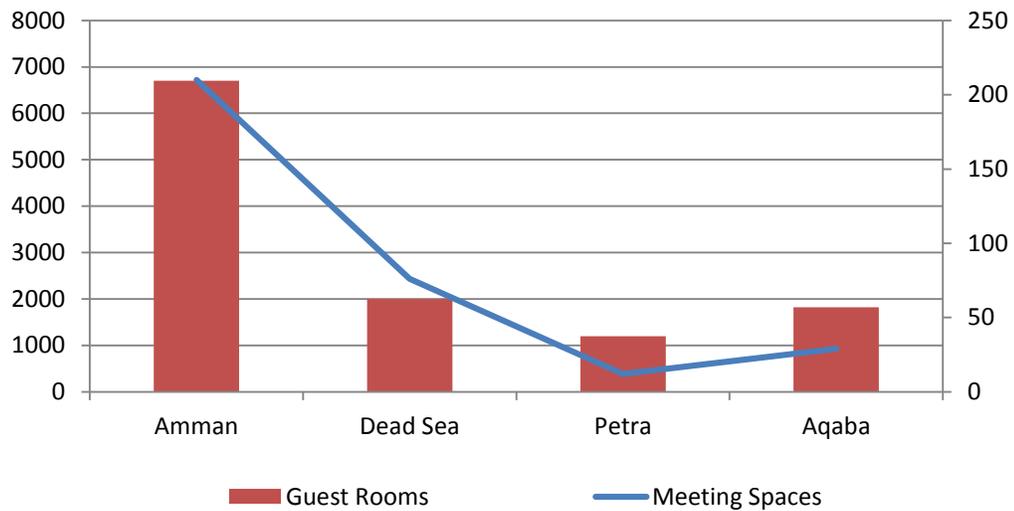
Table 1. Infrastructure for Meetings in Jordan, 2012

	Establishments	Units	Meeting Spaces	Guest Rooms	Theater Setup	Banquet Setup
Amman	Convention Centres	2	8	-	2,980	2,000
	5* Hotels	12	118	3,468	11,730	7,660
	4 * Hotels	16	53	1,747	4,435	3,420
	3 * Hotels	20	31	1,487	4,582	2,870
	Total	50	210	6,702	23,727	15,950
Dead Sea	Convention Centres	1	25	-	5,764	6,030
	5* Hotels	5	42	1,563	3,470	2,280
	4 * Hotels	2	9	437	-	-
	3 * Hotels	-	-	-	-	-
	Total	8	76	2,000	9,234	8,310
Petra	Convention Centres	-	-	-	-	-
	5* Hotels	6	9	764	-	-
	4 * Hotels	2	2	275	1,145	666
	3 * Hotels	1	1	160	-	-
	Total	9	12	1,199	1,145	666
Aqaba	Convention Centres	-	-	-	-	-
	5* Hotels	6	27	1,560	4,460	1,750
	4 * Hotels	1	2	260	-	-
	3 * Hotels	-	-	-	-	-
	Total	7	29	1,820	2,460	1,750

Source: Jordan Tourism Board, MICE Sheet Brochure.

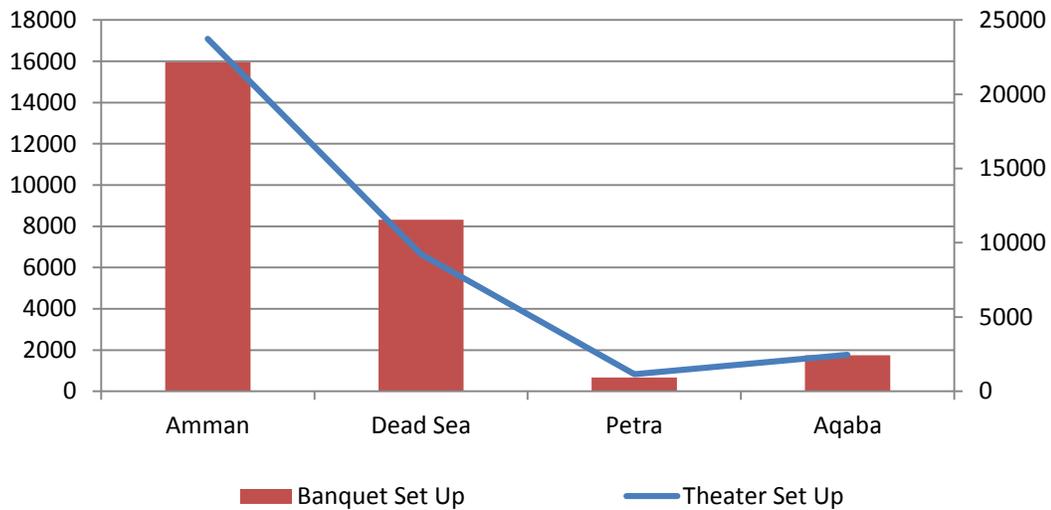
¹ Jordan Tourism Board, 2012.

Figure 1. Infrastructure for Meetings in Jordan (meeting spaces and guest rooms), 2012



Source: Jordan Tourism Board, MICE Sheet Brochure

Figure 2. Infrastructure for Meetings in Jordan (banquet and theater setup), 2012



Source: Jordan Tourism Board, MICE Sheet Brochure

1.1.2 Accommodations Available

At year-end 2013, the Kingdom of Jordan had a total of 18,652 rooms, of which 63% correspond to 4 and 5 star categories. The majority of rooms in Jordan are concentrated in Amman (55%), followed by Aqaba (20%), Petra (10%) and the Dead Sea (11%). The concentration of 5 star rooms in the Dead Sea is noteworthy, as 80% of the total rooms in the destination fall within this category and there are no rooms below the 4 star category².

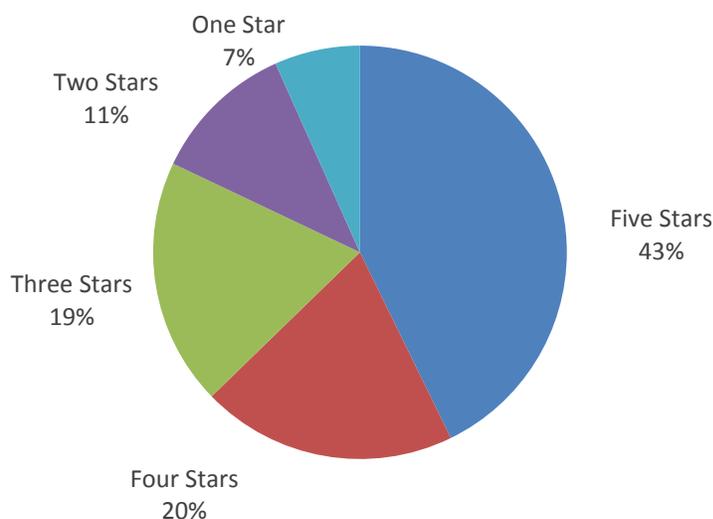
² World Tourism Organization, 2013b.

Table 2. Hotel Rooms Available in Jordan per Category, per Destination, 2013

	Amman	Aqaba	Petra	Dead Sea	Rest	TOTAL
Five Stars	3,946	1,567	766	1,697	-	7,976
Four Stars	2,190	682	309	434	109	3,724
Three Stars	2,281	590	609	-	125	3,605
Two Stars	1,150	734	205	-	10	2,099
One Stars	646	188	55	-	359	1,248
TOTAL	10,213	3,761	1,944	2,131	603	18,652

Source: World Tourism Organization (2013), Basic Indicators.

Figure 3. Distribution of Hotel Rooms Available in Jordan by Category, 2013



Source: Jordanian Ministry of Tourism & Antiquities. Tourism Statistical Newsletter, 2013.

1.1.3 International Air Transportation Connectivity

There are two main airports in Jordan: Queen Alia International (located 32 km/20 miles south of Amman) and King Hussein International (located in Aqaba). Queen Alia International Airport (AMM) is Jordan's largest airport and has been in operation since 1983. It is the main hub of Royal Jordanian Airlines, the national flag carrier, and a major hub for Jordan Aviation, Petra Airlines, Royal Falcon and Royal Wings. Additionally, the Amman Civil Airport (ADJ), formerly known as the Marka International Airport, was Jordan's main Airport until 1983, when Queen Alia International Airport commenced operations. It is currently operated by the Jordan Airports Company and mainly services regional, charter and VIP private flights to nearby destinations.

In 2007, Airport International Group (the company responsible for operating Queen Alia International Airport) invested \$750 million to build a new terminal and \$100 million to modernize old infrastructure at the airport. On March 30, 2013, the old terminal closed and the new terminal commenced operations the next day³. With this expansion, passenger capacity is forecasted to reach 9 million per year. A further expansion is expected in 2014, which will bring the capacity close to 12 million and is part of a plan to position Jordan as a hub.

Jordan's airports have great capacity, and will handle a total of 4.96 million confirmed seats via 34,201 flights arriving in 2014⁴. The majority of these flights will arrive at Queen Alia International Airport (98%), while the remaining 2% will arrive at King Hussein International in Aqaba⁵.

³ Queen Alia Airport (2014).

Table 3. Confirmed Flights (Frequencies) to Jordan's Airports, 2014

Airport	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Queen Alia International	2,664	2,404	2,732	2,843	2,920	2,952	3,003	3,193	2,971	2,891	2,383	2,440
King Hussein International	69	64	71	68	71	69	70	73	67	70	57	56
Grand Total	2,733	2,469	2,803	2,911	2,991	3,021	3,073	3,266	3,038	2,961	2,440	2,496

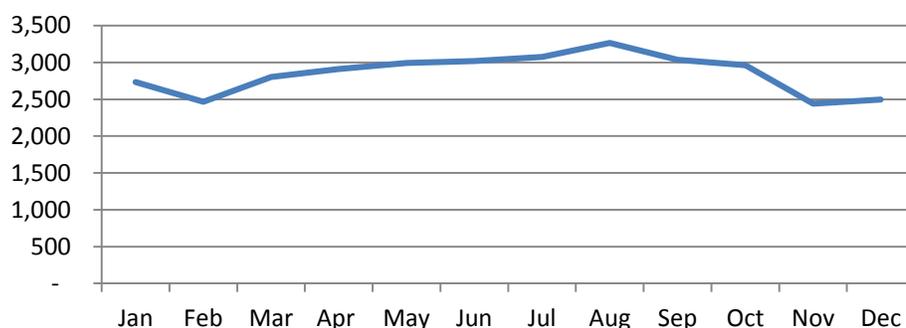
Source: Official Airline Guide.

Table 4. Confirmed Flights (Seats) to Jordan's Airports, 2014

Airport	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Queen Alia International	388,975	354,670	403,736	420,779	424,461	427,463	440,338	473,367	441,870	423,730	330,421	337,649
King Hussein International	7,618	7,397	8,427	8,195	8,408	8,091	8,168	8,633	8,114	8,527	6,343	6,104
Grand Total	396,593	362,067	412,163	428,974	432,869	435,554	448,506	482,000	449,984	432,257	336,764	343,753

Source: Official Airline Guide.

Figure 5. Confirmed Flights (Frequencies) to Jordan's Airports, 2014



Source: Official Airline Guide.

Jordan's airports will receive flights operated by a total of 38 airlines arriving from 36 countries (not including Jordan). Royal Jordanian has the highest number of seats confirmed for 2014, amounting to 2,645,380. Other airlines in order of importance are: Emirates (209,513), Middle East (153,830), Egypt Air (151,372), and Turkish Airlines (149,039). These five airlines concentrate 67% of all available confirmed seats to Jordan's airports in 2014⁶. While Jordan reported a 2% decrease in its international tourist arrivals in 2013, European low cost airlines such as British carrier EasyJet have recently cancelled their services to Amman, due to increased taxes and airport charges in Jordan⁷.

Table 5. Scheduled International Seats to Queen Alia (AMM) and King Hussein (AQJ) International Airports (AMM) by Airline, January-December 2014

Airline	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Aegean Airlines						1,008	1,512	1,512	672				4,704
Afriqiyah Airways	3,900	3,600	3,450										10,950
Air Algerie	909	808	909	909	909	808	909	909	808	808			8,686
Air Arabia	7,128	6,480	7,452	9,720	10,044	9,720	10,044	10,044	9,720	10,044	9,720	10,044	110,160
Air Arabia Egypt	2,268	1,620	2,106	2,106	2,754	2,916	2,754	2,916	2,754	2,916	2,754	2,916	30,780
Air Cairo			450	2,700	2,700	3,750	3,900	4,050	4,050	3,600			25,200
Air France	4,770	4,293	4,929	4,770	4,929	4,770	4,452	4,929	4,770	4,929	4,770	4,929	57,240
Alitalia	1,293		1,520	2,648	2,516	2,970	2,310	2,970	2,805	2,805	2,970	2,778	27,585
Arkia - Israeli Airlin	648	576	648	1,262	602	674	648	576	648	648	576	720	8,226
Austrian Airlines	1,578	1,548	2,112	3,960	4,176	4,098	4,008	4,086	4,008	3,732	1,914	1,914	37,134
British Airways	6,732	5,661	7,344	4,590	7,497	7,191	7,344	7,497	7,191	7,497	7,191	7,344	83,079
Easyjet	1,800	1,620	2,340	1,440	360								7,560
Egyptair	11,950	10,188	10,790	12,672	13,324	12,960	13,392	13,392	12,960	13,392	12,960	13,392	151,372
Emirates	18,397	17,369	17,618	18,429	11,234	10,920	14,788	19,518	18,938	20,582	20,514	21,206	209,513
Etihad Airways	9,940	8,892	9,906	10,780	11,200	10,780	11,200	11,060	10,920	11,060	10,780	11,200	127,718
Flydubai	7,014	5,568	9,222	8,874	7,482	7,308	9,048	13,398	9,570	6,090			83,574
Flynas			3,750	14,250	14,550	14,100	14,700	14,550	14,100	11,850			101,850
Gulf Air	6,820	6,396	6,984	6,764	7,115	7,920	8,140	8,470	7,920	8,250	8,140	8,140	91,059
Iraqi Airways	7,778	8,362	8,596	8,160	8,792	8,216	8,492	8,610	8,188	8,702	8,278	8,482	100,656
Jazeera Airways	6,042	5,724	6,360	6,042	6,519	7,314	5,406	9,222	8,904	6,360	1,431	1,272	70,596
Jetairfly	1,011	633	822	756	756	945	756	945	756	567			7,947
Jordan Aviation	732	976	976										2,684
Kuwait Airways	3,196	2,624	3,082	6,246	6,478	6,042	6,104	6,138	6,144	6,342	6,008	6,342	64,746
Libyan Airlines	3,717	4,880	5,411	5,057	5,746	5,057	5,569	5,234	5,234	5,392	5,234	5,234	61,765
Lufthansa	3,106	3,106	6,150	5,918	6,050	5,800	5,400	6,200	6,000	6,000	6,000	4,600	64,330
Middle East Airline	14,029	12,583	13,927	13,468	13,769	13,468	13,906	13,898	13,458	13,024	9,000	9,300	153,830
NAS AIR	14,400	13,050	10,800										38,250
Oman Air	4,026	3,528	3,498	3,522	3,720	3,834	3,678	3,720	3,678	3,834	3,564	3,792	44,394
Qatar Airways	9,503	9,652	11,631	11,222	12,407	10,405	10,454	10,664	10,481	10,196	8,112	8,488	123,215
Royal Falcon	5,686	3,416	3,660	3,660	3,782	3,660	3,782	3,782	3,660	3,904	3,538	3,782	46,312
Royal Jordanian	209,855	193,421	216,415	229,340	232,042	235,213	242,622	258,200	240,434	229,438	177,244	181,156	2,645,380
Saudi Arabian	9,300	8,426	9,300	9,000	9,300	12,000	10,950	12,450	9,600	9,300	9,000	9,300	117,926
Tarom	791	904	574	1,017	1,017	1,130	1,582	1,469	1,356	904	1,017	1,017	12,778
Thomas Cook	620	522	600	600	750	600	600	750	600	600			6,242
Thomson Airways										438			438
Turkish Airlines	12,470	11,363	12,182	11,992	12,592	12,396	12,752	12,884	12,264	12,892	12,448	12,804	149,039
Yemenia	5,184	4,076	4,185	4,838	5,293	5,293	5,016	5,669	5,105	5,105	3,601	3,601	56,966
Zagros Air		352	2,464	2,112	2,464	2,288	2,288	2,288	2,288	1,056			17,600
Grand Total	396,593	362,217	412,163	428,824	432,869	435,554	448,506	482,000	449,984	432,257	336,764	343,753	4,961,484

Source: Official Airline Guide.

In 2014 Jordan's airports will receive flights originating in 36 countries, with only 116,552 seats (2.3%) corresponding to domestic flights. The United Arab Emirates is the country that has the highest number of seats confirmed to Jordan, with 804,563 (equivalent 16% of the total), followed by Saudi Arabia (657,697 or 13%), Egypt (424,494 or 9%), Lebanon (316,108 or 6%), and Iraq (616,963 or 6%). These five countries will handle 51% of the total seats available and confirmed to Jordan in 2014⁸.

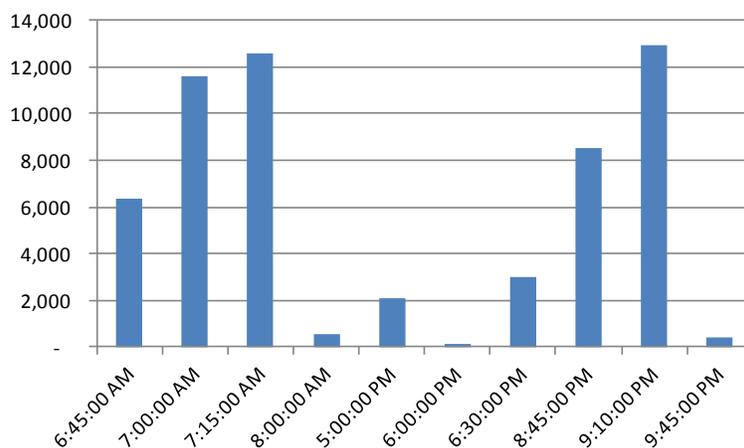
Table 6. Scheduled International Seats to Queen Alia (AMM) and King Hussein (AQJ) International Airports by Country of Origin, January-December 2014

Country	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Algeria	3,602	2,779	3,673	3,919	3,765	3,800	4,037	3,765	3,800	3,450	1,870	1,980	40,440
Austria	4,814	3,871	4,938	6,680	6,830	6,752	6,636	6,844	6,552	6,444	4,224	4,334	68,919
Bahrain	6,820	6,396	7,184	9,764	10,215	10,920	11,240	11,570	10,920	10,750	8,140	8,140	112,059
Belgium	1,064	1,155	1,422	789	750	600	600	750	600	600			8,330
Canada	2,853	2,518	3,055	2,264	2,547	2,547	2,547	2,264	2,547	2,316	2,264	2,547	30,269
Cyprus	2,516	2,521	2,746	2,618	3,140	3,040	3,150	3,140	3,050	3,066	2,600	2,600	34,187
Egypt	29,438	26,657	29,740	36,754	37,910	38,065	37,234	40,707	41,832	40,967	32,166	33,454	424,924
France	8,855	7,702	8,734	9,000	9,077	8,870	8,636	9,196	8,844	9,035	8,070	8,339	104,358
Germany	9,904	8,589	12,377	11,871	11,851	11,302	11,012	12,005	11,418	11,696	11,779	10,296	134,100
Greece	1,725	1,712	1,700	1,700	1,800	2,708	3,712	3,812	2,312	2,312	1,700	1,700	26,521
India	5,084	3,988	4,400	4,180	4,510	4,180	4,400	4,290	4,180	4,510	4,180	4,400	52,302
Iraq	25,450	23,480	27,693	26,011	27,646	26,236	27,092	27,388	26,122	26,143	23,620	24,082	310,963
Israel	7,175	7,762	7,766	8,494	7,935	7,840	8,040	7,926	7,588	7,598	7,431	7,718	93,273
Italy	6,294	4,385	6,498	7,230	6,968	7,068	6,487	7,300	6,669	6,915	7,866	7,538	81,218
Jordan	8,146	9,100	10,400	10,200	10,372	9,660	10,192	10,180	10,348	10,132	9,150	8,672	116,552
Kuwait	14,758	13,496	14,914	18,668	19,845	24,495	20,181	27,108	25,318	20,136	11,739	12,014	222,672
Lebanon	27,838	25,198	27,731	26,541	27,796	26,880	27,734	27,957	27,462	26,855	21,708	22,408	316,108
Libya	16,268	17,117	18,964	14,475	14,886	13,805	14,751	14,120	14,283	14,438	13,114	13,450	179,671
Netherlands	2,242	1,716	1,540	2,636	2,329	1,974	2,000	2,084	1,974	2,188	1,870	1,980	24,533
Nigeria	3,350	2,264	2,264	1,371	1,224	1,088	1,224	1,224	1,088	1,088			16,185
Oman	4,026	3,528	3,498	3,522	3,720	3,834	3,678	3,720	3,678	3,834	3,564	3,792	44,394
Qatar	11,688	11,647	13,967	14,402	15,831	13,729	13,806	13,908	13,805	13,456	10,212	10,688	157,139
Romania	791	904	574	1,017	1,017	1,130	1,582	1,469	1,356	904	1,017	1,017	12,778
Russia	1,486	1,328	1,508	1,539	1,679	1,534	1,560	1,644	1,560	1,508	1,430	1,430	18,206
Saudi Arabia	50,498	51,800	60,072	63,586	62,591	62,875	63,350	68,489	66,162	57,964	24,800	25,510	657,697
Spain	3,519	3,081	3,313	4,705	4,070	3,976	4,526	4,798	4,228	4,338	2,970	2,860	46,384
Sudan	2,948	2,680	2,588	2,856	2,992	2,992	2,856	3,128	2,856	2,992	2,992	2,992	34,872
Switzerland	1,877	1,552	1,768	1,669	1,670	1,528	1,664	1,670	1,528	1,800	1,768	1,768	20,262
Tanzania										438			438
Thailand	10,385	8,028	8,773	8,490	8,773	8,490	8,773	8,628	7,533	8,740	8,490	8,773	103,876
Tunisia	1,165	1,292	1,469	1,356	1,340	1,350	1,340	1,340	1,350	1,430	1,200	1,400	16,032
Turkey	17,263	15,572	16,717	18,222	18,975	18,550	18,952	19,084	18,264	18,592	16,348	16,804	213,343
Ukraine	838	795	900	846	900	900	900	900	800	900	900	800	10,379
U.A.E.	66,760	59,237	66,826	68,408	59,806	62,184	72,221	86,392	71,866	68,924	60,032	61,907	804,563
United Kingdom	16,167	13,254	15,622	14,462	16,514	15,681	16,117	15,643	14,724	15,690	12,201	12,521	178,596
USA	10,146	7,112	7,874	8,636	10,813	14,202	15,276	16,299	12,681	10,278	7,620	7,874	128,811
Yemen	8,840	8,001	8,805	10,093	10,782	10,769	11,000	11,258	10,686	10,202	7,729	7,965	116,130
Grand Total	396,593	362,217	412,013	428,974	432,869	435,554	448,506	482,000	449,984	432,257	336,764	343,753	4,961,484

Source: Official Airline Guide.

As can be seen in Figure 5, 91% of air seats scheduled between Amman and Aqaba airports during 2014 will have sub-optimal schedules for tourist destinations, complicating the check-in and check-out in hotels, as well as also complicating any transportation logistics for meetings or events of any size. This creates a significant operational challenge for meeting and event organizers.

Figure 5. Scheduled seats between Queen Alia International Airport (AMM) and King Hussein International Airport (AQJ) by Month, January-December 2014



Source: Official Airline Guide.

1.1.4 Events and Participants

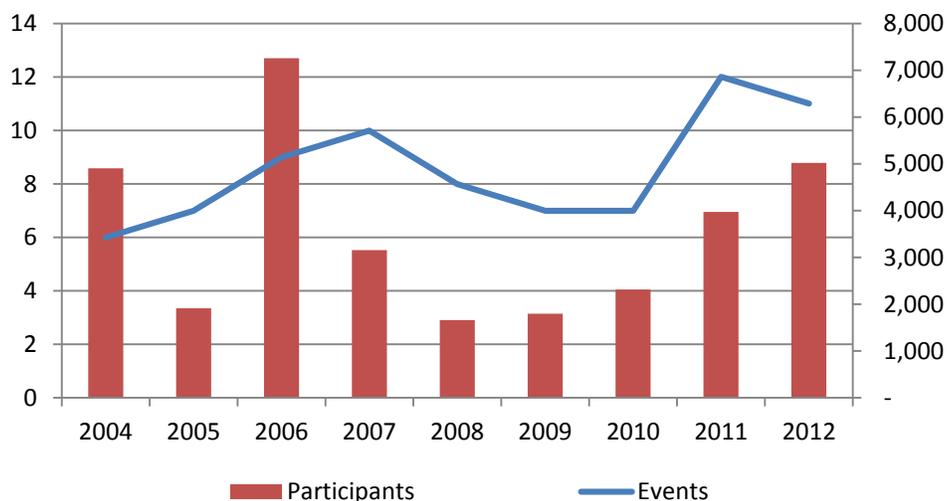
According to ICCA⁹ in 2012 a total of 11 international events¹⁰ were organized in Jordan with 5,019 participants. Relatively speaking, the number of meetings hosted in Jordan has been steady since 2004. The number of participants mirrors the same performance while the average number of participants per event doubled between 2008 and 2012.

Table 7. Meetings and Participants in Jordan, 2004-2012

Year	Events	Participants
2004	6	4,907
2005	7	1,915
2006	9	7,255
2007	10	3,160
2008	8	1,664
2009	7	1,798
2010	7	2,313
2011	12	3,972
2012	11	5,019

Source: The ICCA Association Database, 2014.

Figure 6. Meetings and Participants in Jordan, 2004-2012



Source: The ICCA Association Database, 2014

1.1.5 Event Organizer

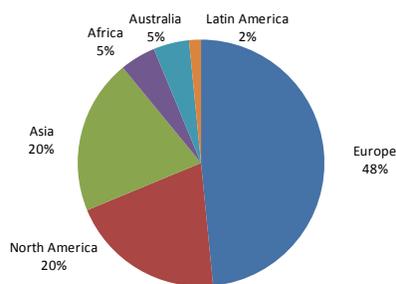
Nearly half (48%) of ICAA-recognized events hosted in Jordan between 2004 and 2012 corresponded to an organizer based in Europe, while 20% corresponded to a North American organizer and 20% to an Asian based¹¹.

Table 8. Homebase of organizer, 2004-2012

Region	Events
Europe	48%
North America	20%
Asia	20%
Africa	5%
Australia	5%
Latin America	2%

Source: The ICCA Association Database, 2014.

Figure 7. Homebase of Organizer, 2004-2012



Source: The ICCA Association Database, 2014.

¹¹ International Congress and Convention Association, 2014.

1.1.6 Seasonality

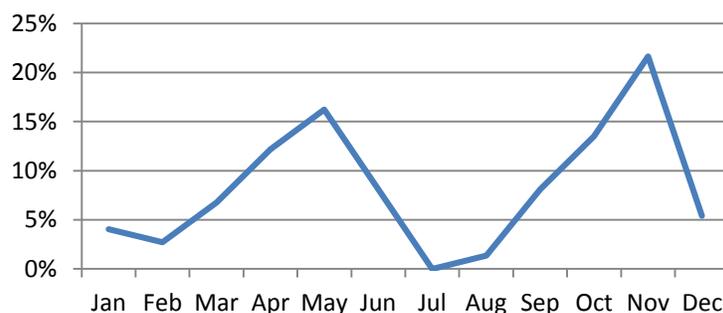
In terms of the seasonality of ICCA meetings organized in Jordan between 2004 and 2012, two peaks are clearly perceivable during the spring (April and May) and the fall (October and November). The months of April and May concentrate 28% of the meetings during the year, while October and November concentrate 36%. This is consistent with global meetings industry business cycle seasonality. The rest of the year represents 36%, with a noticeable absence of meetings during the summer, which only account for 1% of the year's meetings.

Table 9. Seasonality of Meetings in Jordan, 2004-2012

Month	Events
Jan	4%
Feb	3%
Mar	7%
Apr	12%
May	16%
Jun	8%
Jul	0%
Aug	1%
Sep	8%
Oct	14%
Nov	22%
Dec	5%

Source: The ICCA Association Database, 2014.

Figure 8. Seasonality of Meetings in Jordan, 2004-2012



Source: The ICCA Association Database, 2014.

1.1.7 Venues

The majority of ICCA-recognized events organized in Jordan from 2004 to 2012 were hosted in a hotel with meeting facilities (67%), while 19% were organized in a conference or exhibition center, 5% in a university and 10% in other venues¹².

¹² Idem.

Table 10. Venues, 2004-2012

Venue	Events
Conference / Exhibition Centre	19%
Meeting facilities in Hotels	67%
Other Venues	10%
University	5%

Source: The ICCA Association Database, 2014.

Figure 9. Venues, 2004-2012



Source: The ICCA Association Database, 2014.

1.1.8 Subject of Meetings

The most common subjects for ICCA-recognized meetings hosted in Jordan between 2004 and 2012 represent Medical Sciences (17%), Economics (12%), Social Sciences (11%), Technology (9%) and Education (7%). Other subjects account for the remaining 54%¹³.

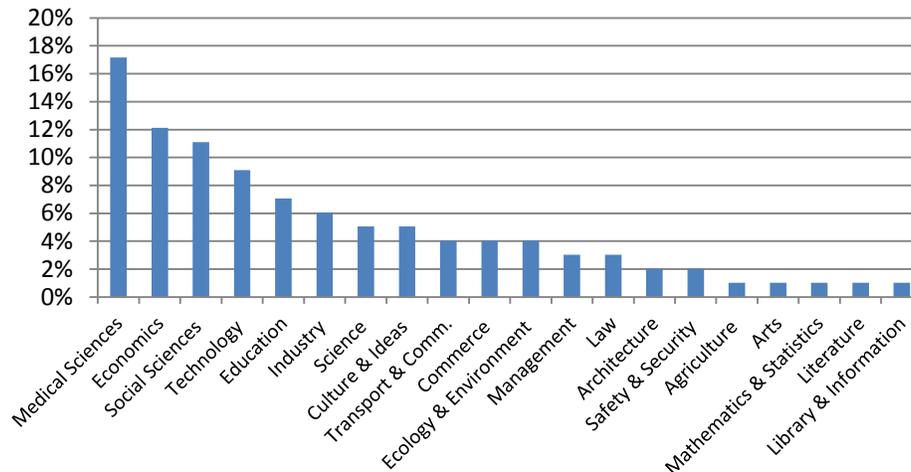
Table 11. Subject of Meetings in Jordan, 2004-2012

Subject	Events
Medical Sciences	17%
Economics	12%
Social Sciences	11%
Technology	9%
Education	7%
Industry	6%
Science	5%
Culture & Ideas	5%
Transport & Comm.	4%
Commerce	4%
Ecology & Environment	4%
Management	3%
Law	3%
Architecture	2%
Safety & Security	2%
Agriculture	1%
Arts	1%
Mathematics & Statistics	1%
Literature	1%
Library & Information	1%

Source: The ICCA Association Database, 2014.

¹³ Idem.

Figure 10. Subject of Meetings in Jordan, 2004-2012



Source: The ICCA Association Database, 2014.

1.2 CURRENT OVERVIEW OF THE MEETINGS INDUSTRY IN JORDAN¹⁴

A field visit to Jordan was made from late-February to early-March 2014. During this visit, in-depth interviews and site inspections all over the country took place with the objective to assess and understand the current dynamics of the meetings industry in Jordan, as well as familiarizing our team with the infrastructure and institutions in order to evaluate opportunities and develop strategies.

Twenty-one interviews were held with key stakeholders of the meetings industry. Site inspections were made to hotels, meeting venues, as well as convention and exhibition centers. Visits were also made to different types of alternative venues, tourist sites /attractions; meetings with key players and authorities related to the sector were held during this trip. These visits were grouped according to previously determined regions or areas according to their meetings activities and potential. A list of interviewees and institutions is found in Appendix I as well as the topic guide used during the interviews (Appendix II).

Destinations visited were:

- Amman
- Dead Sea
- Petra
- Aqaba

Tourist sites and attractions visited include:

- Citadel, Jordan Museum and Roman Theatre, Amman
- Roman City, Jerash
- Petra, Little Petra and Petra by Night
- Wadi Rum
- Karak Castle
- Dead Sea
- Aqaba

¹⁴ Results presented in this section were obtained through information processed the in-depth interviews and surveys.

Interviews consisted of:

- Inquiring about the current dynamics of meetings industry activity in Jordan;
- Obtaining information about the short, mid and long term vision of meetings industry stakeholders in the country and in each destination;
- Learning from primary sources about their perspective on past experiences and needs for the future;
- Reviewing and verifying the capabilities to attract domestic and international meetings as well as industry mechanisms for promotion;
- Understanding the way in which each destination is organized in order to attract, promote and plan meetings; and
- Determining the mechanisms to educate and certify the meetings industry workforce.

The main findings and results of interviews are presented together in this report along with the assessments of the Team who managed this project. Findings about each city or destination visited are outlined, detailing the current infrastructure, operational capacity as well as data collected from the interviewees. At the end of this chapter, our assessment of the current situation as well as considerations for the five strategic pillars (leadership, economic resources and structure, infrastructure, promotion and engagement) that will define the project's phase II strategic development and operational plan, are presented.

1.2.1 SWOT Analysis

We believe that Jordan has an opportunity to improve its economic and tourism industry performance by securing, producing and organizing additional national and international meetings and events.

To provide an assessment framework, we have prepared a SWOT analysis (strengths, weaknesses, opportunities and threats) of the meetings industry in Jordan grouped around core meetings industry elements - infrastructure, operation, connectivity and social diversity – followed by our analysis and assessment.

**SWOT ANALYSIS
STRENGTHS**



INFRASTRUCTURE

- Sufficient quality meeting space (square meters) to attract and host events based on current demand.
- Sufficient quality sleeping rooms (four and five-star)to attract and host events based on current demand
- Excellent highways.
- Two modern international airports with capacity to receive more flights than current operations.

CONNECTIVITY

- Envious geographical location due to its closeness to Europe and Asia
- Good national and local road system

LEADERSHIP AND OPERATIONS

- Good supply of meeting/event suppliers with expertise in organizing events and with a good marketplace reputation in terms of reliability, quality and service attitude.
- Jordan is currently well-positioned as a high-end incentive travel destination for motivational experiences.

SOCIAL DIVERSITY

- Socially, economically and politically stable. One of the safest countries in the region
- Relevant and compelling local content for the delegates' experience.
- Jordan delivers an authentic Arab cultural experience.
- Excellent weather all year long.
- Unique gastronomy offerings.

**SWOT ANALYSIS
WEAKNESSES**



LEADERSHIP AND OPERATIONS

- Perception that Jordan is an unsafe country permanently engaged in military conflicts.
- Absence of a dedicated meetings and events organization (convention bureau) that can offer, promote and sell Jordanian destinations in the international meetings marketplace.
- Lack of formal industry-certified education in the supplier community, (with exception of hotel global chains that meet their own protocol standards)
- The meetings industry in Jordan currently lacks a shared vision and a collaborative approach to marketplace success.
- Limited involvement of the Government in the development of the Meetings Industry in Jordan.
- Excessive regulations and control procedures in order for companies, individuals and suppliers to be able to join meeting industry organizations and trade/professional associations in general.
- Lack of meetings and events industry research and marketplace database to quality business opportunities and manage relationship development.

INFRASTRUCTURE

- Need for additional non-Arabic Signage.
- Technology and internet bandwidth may be enhanced I some of the convention centers and hotel meeting rooms.
- Lack of sufficient shopping and entertainment experiences.

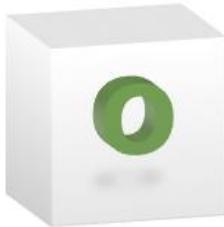
CONNECTIVITY

- Current air connectivity is insufficient and represents an obstacle for future growth.
- Public transportation within Jordan destinations is limited.
- Air domestic connectivity is limited.

SOCIAL DIVERSITY

- Jordan has been unable to produce and keep its own global events (WEF is the exception at the Dead Sea)
- Jordan's diverse and authentic Arab experiences remain largely unknown in the global meetings and events marketplace.

**SWOT ANALYSIS
OPPORTUNITIES**



INFRASTRUCTURE

- Regional competitors are more expensive and do not have the components and authenticity that the Jordanian experience offers to the global meetings and events industry.

CONNECTIVITY

- Take advantage of Open Skies Policy to attract an increasing amount of international flights.
- To take a proactive approach in diminishing tax rates in airport services to attract more international operations and global carriers.

LEADERSHIP AND OPERATIONS

- Create a national meetings industry organization (e.g. Convention Bureau)
- Jordan remains largely unknown. This opens an opportunity for selling an exotic, different and genuine destination.
- Jordan is beginning to promote itself independently and as a separate destination will generate a better position for itself (branding) and awareness of the destination.

SOCIAL DIVERSITY

- Strong business potential from Jordan's global participation in medical, pharmaceutical and academic association communities.
- Improve the availability of Jordanian authentic elements to improve delegates' experience in the destinations (Music, Food, Night Life).

**SWOT ANALYSIS
THREATS**



LEADERSHIP AND OPERATIONS

- With continuous geo-political conflicts in the region and without a strategic communications campaign and industry leadership organization, Jordan's image may continue to be seriously compromised
- The lack of continuity and long-term vision at different government levels and institutions is impeding an integrated strategic approach needed for the international meetings and events industry to be successful in the marketplace.
- The lack of a specialized "meetings industry mindset", as distinct from a leisure tourism mindset, can compromise the industry's credibility internally and externally.

INFRASTRUCTURE

- Egypt and Turkey are able to compete on a low-price value proposition. Strategy must focus on authenticity of experience.

CONNECTIVITY

- Neighboring countries with similar attractions have better price-competitive conditions for carriers and flights to generate passenger flows.

SOCIAL DIVERSITY

- Competitive destinations offering less-authentic Arab experiences but with the capacity to attract meetings and events through financial incentives.

1.2.2 Infrastructure – The Essential Elements to Attract Meetings

Analyzing the basic structural elements for a successful and sustainable meetings and events industry – meeting/event space, hotel rooms and air connectivity, leads us to the following preliminary assessment conclusions:

- **Meetings/Event Space:** Based on current and forecasted marketplace demand conditions for the next three years, Jordan presently has an adequate amount of space (square meters) to attract and host international and regional events. While there are plans to increase space, the current supply is sufficient.
- **Hotel Rooms:** The number of available rooms to support Jordan’s meetings and events business, mainly four and five-star, is also adequate and sustainable. Increasing the amount of available rooms could be considered as the demand for meetings increases in the future. Nevertheless, international hotel chains are planning to increase the supply of rooms available (e.g. Movenpick, Kempinsky, W, Park Hyatt, St. Regis, and Jumeirah), with a primary focus in Aqaba and the Dead Sea.
- **Air Connectivity:** This is a vital issue in Jordan that will inhibit tourism and meetings industry growth in the country. Although Jordan has planned capacity for more than 4.9 million air seats in 2014, most of them are connected to the United Arab Emirates and Saudi Arabia. Additionally, data as well as industry and marketplace perceptions reflect the fact that it is expensive and difficult to fly into Jordan and that there is insufficient capacity available to compete with other destinations in Jordan’s competitive set. Current air connectivity is insufficient and represents an obstacle for future growth.

Recent marketplace trends have elevated “content” (the ability of the destination to deliver relevant and compelling local content experiences to the delegates’ experience) and “context” (the economic, social and political aspects of the destination to support the organization’s mission and business objectives) to a vital component in a destination’s essential meetings industry elements.

In this respect, Jordan has undeniable world-class tourist attractions, such as its four UNESCO World Heritage Sites as well as one of the *New Seven Wonders of the World*. In addition, the Jordanian medical education system is one of the most highly-regarded in the Middle East with many students from the region studying medicine in Jordan. The country is ranked by the World Bank as the number one health-care services provider in the region and among the top five in the world¹⁵. It was also recently named the top medical tourism destination in the world. Jordan is also where airline pilots from many countries in the region are trained. These elements make the country a natural candidate to source and attract meetings related to medicine, pharmaceutical, international aviation (aerospace) Middle East studies and archaeology.

1.2.3 Strengths: Positive Demand-Generating Elements for Jordan

As a result of interviews with industry stakeholders and a comprehensive search of secondary sources, Jordan’s primary demand-generating elements as a meetings destination include:

- Jordan consistently delivers an authentic end-to-end travel Arab experience. From food to culture to archaeology, expectations are always exceeded. It was noted that when tourists visit the countries in the Gulf, what they really are looking for are the tourist experiences delivered in Jordan, but unfortunately awareness and understanding are constrained.
- Enviably geographical location due to its proximity to Europe and Asia.
- It is arguably the safest and most stable destination in the region.
- Well-equipped infrastructure and high-quality services.
- Excellent weather all year long.
- Special and authentic gastronomy.

¹⁵ http://en.wikipedia.org/wiki/Medical_education_in_Jordan consulted in March 10, 2014.

- Value advantage: Gulf destinations are more expensive and lack the breadth of authentic Arab visitor experiences that Jordan has.
- Excellent pathways and highways.
- Jordan is currently well-positioned as a high-end incentive travel destination for motivational experiences.

1.2.4 Challenges: Jordan's Barrers to Marketplace Success

- Security misperceptions and poor marketplace knowledge about its current reality are significant barriers. Contributing to the lack of destination marketplace knowledge is an absence of a consistent national marketing and its different destinations. Efforts to position the country have been undertaken but individual meeting and event destinations within the country have not been showcased. The political and social situation of neighboring countries exacerbates this situation.
- Insufficient and expensive air accessibility creates a competitive disadvantage in the marketplace. On different occasions it was noted that many business opportunities have been lost to direct competitors (e.g. GCC and Turkey) as a result of their superior connectivity.
- Jordan lacks a consistent marketplace identity based on a cohesive and well-designed brand strategy. This contributes to the marketplace security misperception. Additionally, its primary marketplace position as a leisure travel destination will require specific meetings industry identity development efforts (i.e. branding) to create a meeting industry identity that is distinct from its leisure positioning.
- Jordan is not seen as a "big event" destination. With the exception of the World Economic Forum, which since 2005 takes place every other year in the Dead Sea, the country is not positioned as a host destination for summits, forums or profile UN events.
- The meetings industry is largely unorganized (with the exception of the Dead Sea area) which inhibits collaboration and the exchange of marketplace information.
- The lack of public transportation in Amman and elsewhere requires attendees to often depend on private transportation, which can be a very expensive alternative. It is also difficult and complicated to move independently from the Dead Sea airport to Aqaba and Petra.
- The country's full authentic cultural potential is not exploited to its advantage. For example, in Amman it is difficult to find Arabic dance, food and music experiences for tourists.
- Jordan lacks consistent and committed support from the national government that has led to inconsistent development and promotional strategies, crippling taxes, visa fees and regulations. Reliance on government financial and policy support as a cornerstone element in a meetings industry development strategy, while standard in most countries and in Jordan's competitors is unlikely in the short-term.

1.2.4.1 Safety Issues, International Perceptions and Neighboring Countries

As was noted previously, interviews with hotels and industry companies highlighted the decline in tourist arrivals in general during 2011-2013. For the meetings sector, the quantity of RFP's and confirmed future bookings also decreased. However, January and February 2014 have improved with larger numbers of tourists in hotels with the renewed growth in RFP's received for meetings. Recent observations are that some of the business originally planned for Syria, Lebanon and Egypt is now relocating to Jordan, and also that the promotional efforts made since 2011 by the Jordan Tourism Board are beginning to yield results (see comment below).

Unfortunately for Jordan, because of the political instability of neighboring countries, a perception is manifesting with some decision-makers that Jordan is an unsafe country permanently engaged in military conflicts. Fortunately, it is only a matter of perception. In reality it is possible to

demonstrate that Jordan is an economically and politically stable country, and probably one of the safest in the region. While there was no study or reference found about Jordan’s security misperception, it is a crucial element that has to be addressed in the short-term through a strategic communication initiative if the meetings industry in Jordan is to succeed¹⁶. When asking international meetings planners for a reason why they have not organized any meetings/events in Jordan, the responses reflected a lack of product awareness, perceived security issues and a lack of air connectivity.

Survey About Jordan A Meetings And Events Destination: Perceptions From The Market
<ul style="list-style-type: none"> • An online survey was deployed during March and April 2014, in order to capture the perceptions of meeting planners (corporate and association), incentive planners, event organizers and suppliers about: Their experience organizing events in Jordan, • Reasons for selecting Jordan as a host, • Elements that should be changed,

Comments About The Experience Of Working With Jordan Include	Reasons For Selecting Jordan To Host A Meeting / Event Include
<ul style="list-style-type: none"> • Very flexible providers and high quality of service and good quality of hotels. Although in the US some perceive communication problems among organizers and suppliers. • Nice attractions and activities. • Attractive and unique places (Petra, Dead Sea, Wadi Rum) and friendly people. • Flights are difficult (in quantity and price) and too many delegates require visa. • Jordan offers great possibilities to make a good combination for incentive programs: Rich in culture, nature, adventure and relax, beach, deserts, wadis. • Not many all Inclusive hotels in Aqaba. 	<ul style="list-style-type: none"> • New and undiscovered destination. Unique attractions and spectacular sites Historical attractions, religious sites and natural beauties. • Rich in culture and activities. • Safe destination. • Location - not far from Europe. • Convenient for a 4-5 days stay (mostly requested by European corporate clients). • Good value for money, and competitive prices. • Interesting culture. • Organizers have good relationship with local DMCs
Relevant Aspects That Should Be Changed Or Improved In Order For Jordan To Receive More Meetings And Events	Reasons For Not Organizing Meetings And Event In Jordan Include
<ul style="list-style-type: none"> • More creative local partners with good concept for incentive and team buildings idea. • More cosmopolitan attractions for younger travelers and contemporary restaurants/ venues to promote diversity of options. • Better standard camps at the desert and wadis. • More hotels in Petra and more all-inclusive hotels for leisure are needed. • Direct flights from the U.S. • Development of Amman as a tour destination. • New state-of-the-art museums. 	<ul style="list-style-type: none"> • No interest in the region and no demand. • The political situation and negative news about the Middle East. • “It hasn’t ever occurred to me” • Too expensive. • Little knowledge about Jordan and not familiar with the country. • Prices of airline tickets and no direct flights. • Very hard to convince corporate clients to give it a shot. • Clients are more inclined to go for Turkey or Dubai when they want to experience a bit of the middle eastern culture. • Jordan is only requested as a leisure destination (Petra)

Organizers That Have Organized Meetings In Jordan Also Considered:	Organizers That Have Not Organized Meetings In Jordan Also Considered:
<ul style="list-style-type: none"> • Dubai (85%) • Turkey (65%) • Morocco (60%) • Abu Dhabi (60%) • Europe (55%) • Egypt (45%) • Israel (40%) • Qatar (35%) • Tunisia (25%) • Saudi Arabia (20%) • Others (US, Lebanon) (25%) 	<ul style="list-style-type: none"> • Europe (79%) • Dubai (70%) • Turkey (61%) • Abu Dhabi (40%) • Morocco (37%) • Egypt (23%) • Israel (20%) • Qatar (16%) • Tunisia (15%) • Saudi Arabia (10%) • Others (US, Caribbean Southeast Asia) (20%)

- **Reasons for not organizing an event in Jordan, and Competitive destinations.**

One of the most important findings in the research process relates to the way in which the country has been marketed in the leisure market in recent years. Before 2011, Jordan was offered as a tourist destination in combination with other countries in the region, such as Egypt, Syria, Lebanon and Israel. However, because of the “Arab Spring”, Jordan was forced to begin selling itself independently and as a separate destination. On one hand, Jordan stopped depending on its neighbors, particularly with respect to meetings and events, and positioned itself as a separate destination with its own value proposition. On the other hand, it stopped benefiting from being positioned as part of a regional experience, leveraging destination brands such as Egypt and Israel with existing demand bases of their own.

One of the elements to be highlighted about Jordan is the fact that international hotel chains and renowned brands are investing in the country and increasing the hotel room supply. This illustrates that there is confidence in what is happening in Jordan and that there will be future benefits to those investing today.



1.2.4.2 Air Connectivity

Air connectivity is a significant obstacle that must be addressed by Jordan in order to attract more international and regional events. Some of the elements that best portray this situation are:

- The open skies policy implemented in 2007 with the United States made in conjunction with the privatization of the national airline (Royal Jordanian) has yet to be fully implemented¹⁷.
- There are few airlines flying into and from Jordan¹⁸. According to the CARC, half the take-off and landing slots in the Queen Alia International Airport (AMM) are devoted to Royal Jordanian, while the rest are for the use of other airlines. An international chain noted that each year its corporate offices refuse to consider Jordan as a destination for its Middle East regional meeting because of the lack of direct flights from other countries.
- Jordan implemented a \$60 passenger arrival tax on each airline. (During the research process it was found that arrivals at Aqaba airport are exempt from this tax.) This adds to the cost of transportation to Jordan, reducing its meetings and events marketplace competitiveness.
- On average, Royal Jordanian fares are 28% more expensive than those of its competitors¹⁹. This is partly caused by the fact that fuel is more expensive in Jordan (on average one liter of gasoline costs \$1.40) than elsewhere in the region. As the national flag carrier, Royal Jordanian buys the majority of its fuel in Jordan raising its operating costs relative to its regional competitors.
- Civil aviation authorities and the Jordan Tourism Board do not appear to have good communications, inhibiting the development of collaborative ventures or policy support.

1.2.4.3 Meetings Industry Education

International meeting industry certifications establish a professional rapport and marketplace credibility for both the business and the destination. Increasingly businesses and even destinations are making an investment in meetings industry-specific education and certification to develop a competitive advantage.

When inquiring with Jordan's meeting industry stakeholder about their meetings industry-specific education and certification, all interviewed hotels, DMC's and suppliers indicated they lacked specific education endorsed by international industry organizations. Hotel leaders noted they focused their training on the standards of their international chains and not accepted industry designations (e.g. CMM, CMP, CASE, etc.).

It is important to mention that in January 2014 Jordan's first generation of industry professionals obtained their certification as CMP's in Jordan.

1.2.4.4 Promotion and Prospecting

The international meetings and event business opportunity is not consistently and collaboratively being pursued by Jordan's meetings and event industry stakeholders.

Until now, the Jordan Tourism Board ("JTB") has positioned the country exclusively as a leisure tourism destination. Lack of sufficient and consistent JTB marketing funds has made it impossible to promote the country as a meetings destination. Jordan's marketing strategy has, out of necessity, focused on umbrella image marketing campaigns for the entire country, making meetings industry lead-generation and conversion difficult.

When asking about tactics to sell or promote their hotel property services in the international meetings industry marketplace, hotels said they depend primarily on the promotional actions made through their respective regional sales or corporate offices. DMC's and PCO's noted they rarely take actions to directly promote themselves in the international marketplace because they expect

¹⁷ Civil Aviation Regulatory Commission (CARC).

¹⁸ In the section titled "International Air Connectivity" it was mentioned that there are 69 international airlines that will be operating flights into Jordan in 2014, according to the OAG.

¹⁹ Kayak.com, exercise made in February 2014, based in round plane tickets from Europe, Asia and America to Amman, with 3, 6 and 9 months of anticipation.

potential clients to contact them at tradeshows or through the internet. Some companies participate at international meeting industry marketplace events, particularly at IMEX/EIBTM. Nevertheless, they expect clients to look for them and they do not undertake a strategic intelligence-based approach to prospecting.

There is a need for a research institute or a commercial intelligence department at the Ministry of Tourism or the Jordan Tourism Board that could help the industry develop better strategy-based promotional initiatives. Although the Jordan Tourism Board has a research team focused on the country's tourist promotional campaigns, they are not undertaking research efforts to support meetings industry opportunities. By extending their efforts to collect/track some basic meetings industry data (e.g. passenger arrival data), they could provide tremendous value to stakeholders and also help foster increased industry collaboration.

1.2.4.5 Tourism and Meetings Industry Regulation

Tourism and meetings industry stakeholders in Jordan expressed negative comments about undue regulation in the industry. Examples include the mandatory 10% service charge levy on hotel revenues (in addition to sales taxes) and the requirement that all associations or organizations representing individual/industry interests register (for a fee) or affiliate themselves with the government. The industry tension is a result of the high tax/regulatory costs extracted from the industry by the government and the limited financial and policy support the industry receives in return. This tension is inhibiting communication and collaboration between meetings industry stakeholders and the government.

1.2.4.6 Meetings and Events Sector Maturity And Mindset

Jordan's meetings and events industry is still very much an emerging industry sector and must continue to evolve its business mindset and culture quickly in order to become more credible and competitive within the marketplace.

Over the last ten years, the global meetings and events industry sector has evolved separately from the leisure sector from almost every perspective: distribution, education, performance measurement, supply chain etc. The meetings and events sector has trended toward an increasingly "business-results" priority for evaluating destination and supplier options. This has evolved to the point that many meeting planners and decision-influencers prefer to do business only with destinations and/or suppliers who are able to project an understanding of the business imperative of a pending meeting or event. The global marketplace no longer considers the meetings industry a direct part of the tourism industry but a separate industry sector that happens to use the tourism infrastructure. It should be noted that more than half of the meetings industry supply chain elements are NON-travel related companies or individuals (such as AV companies, translation solutions, technology providers or production enterprises).

An example of this is in marketing strategy. Where leisure travel marketing appeals to the senses and emotions, successful communication strategies for meetings and events focus on the pragmatics - emphasizing the ease of doing business, the rational components of infrastructure and introducing interesting content proposals to association and corporate clients to drive their business results

Given Jordan's leisure tourism equity and legacy, it is not surprising that Jordan's existing meetings and events industry currently remains strongly entrenched in the leisure travel ecosystem and context. This includes the use of leisure travel vernacular and travel agent business language. In that leisure travel ecosystem, volume pricing, packages, charters and all inclusive properties are the most common marketplace business considerations. This contrasts with the meetings and events industry ecosystem where business return on investment is the dominant metric.

This is a cultural and structural element of Jordan's sector that will be difficult but essential to change in the short-term, requiring significant educational efforts to evolve Jordan's stakeholders' mindset to align more closely with the existing meetings and events mindset and "culture" of

competing in the global meetings and events marketplace in order to be successful. This includes evolving its approach to negotiating room allotments, proposing tour opportunities and developing itineraries from one with a leisure hospitality focus to one where infrastructure, economic context and meeting business objectives play a more crucial role there has to be consciousness about this reality. Meetings industry education is the key to implement this necessary evolution.

1.2.4.7 Institutionalization of The Meetings Industry

Jordan's meetings industry lacks validation and recognition within the country's commercial and legislative ecosystems.

In countries where the meetings industry sector has grown organically around the natural attractiveness and utility of its diverse destinations, collaborative policy efforts between industry and government successfully support the growth and evolution of the sector. The focus of these efforts often includes:

- Sustainability considerations in investment;
- Professional credentialing and quality seals for suppliers;
- Establishing relationships between the private sector and universities in order to support smooth transitions in new administrations that enter the marketplace;
- Horizontal facilitation policies (not only in tourism) that can elevate the industry within the policy framework of the country;
- Research capabilities to generate official industry statistics to support private sector investment and industry marketplace development.

Economic Impact And Lack Of Government Validation

According to Various Interviewees, The Jordanian Finance Ministry Currently Estimates Total Annual Current Meetings Tourism Industry Spending Around JD 80 Million And Not Really Significant To The Overall Jordanian Economy And National Welfare.

The Jordanian Government Acknowledged The World Tourism Organization And World Bank-Endorsed Tourism Satellite Account Data That Estimates Jordan's Tourism Direct Impact At JD 1.222 Billion (2012) representing 6.5% of Tourism Direct Value Added.

The Lack of Tourism Industry Validation And Support Is A Constant Complaint of The Industry, Further Contributing to a Lack of understanding and support around direct financial Investment as well as Regulation and Policy Support.

Institutionalization also supports higher-performing collaborative promotional efforts, through the development of a solid and consistent strategic industry marketing plan with a 360-degree review approach to engage potential clients to consider Jordan destinations for their meetings. Currently, presentations and messaging at trade-shows like IMEX and GIBTM are good tactics, but lack a collaborative a private-public sector approach to help drive results. The Jordan Tourism Board should play more of a "connector" role, establishing a core industry story and strategy as a platform for meetings industry suppliers to promote/sell their specific business enterprises in the marketplace.

1.3 JORDANIAN MEETING DESTINATIONS APPEAL

In this section the strengths and weaknesses of each destination are presented from the point of view of their ability to attract and organize meetings.

1.3.1 Amman

STRENGTHS

- Modern City and Example of Economic Activity/Vitality In A Middle East Region.
- Comprehensive Infrastructure: 6,700 Hotel Rooms In The 3 To 5-Star Category Representing 57% Of The Total Meeting Hotel Sleeping Room Capacity In The Country.
- Hotels Have Sufficient Space/Capacity To Receive Meetings, And They Already Register A High Level Of Activity.
- Existing Meetings Activity Base: Approximately 25% To 30% Of Hotel Occupancy In Amman Is Generated By Meetings (Groups)
- Significant Receptive Tour Operator Network that Can Be Evolved Into DMCs.

WEAKNESSES

- Absence Of A Diverse And Accessible Nightlife, A Concentrated Shopping Area, City Animation And Entertainment Activities For Visitors. This Makes It Difficult To Experience The Essence Of Jordanian Life in the City.
- Lack Of A Public Transportation Network - People Depend On Taxis Or Private Rentals.
- Existing Meeting Industry Remains Relatively Immature.

1.3.2 Dead Sea

STRENGTHS

- Hotels Are Relatively New With High Quality Standards Represented By International Renowned Brands.
- Strong Spirit of Local Industry Collaboration around the Need for a Convention Bureau. Local Stakeholders are Willing to Finance Its Operation.
- According To The Interviews With Dead Sea Hotels, Approximately 20% Of The Dead Sea Hotel Activity Is Generated By Meetings.
- Unique And Well-Equipped Convention Center That Can Boost Regional Activity With A Good Promotional Strategy.
- Convention Center Executives Actively Involved With International Industry Associations.

WEAKNESSES

- Strictly Speaking, It Is Not A Defined Destination, But A Cluster Of Hotels, With A Convention Center And Retail Shopping.
- Up To Now, Tangible Results From The Convention Center Have Not Manifested.
- There Is No “Convention District” Mentality Among The Stakeholders.
- Distance From Amman And Queen Alia Airport Is At Least A 40 Minutes Transfer.
- Lack of Activities And Entertainment Outside The Hotels.

1.3.3 Aqaba

STRENGTHS

- Sophisticated Infrastructure To Host Meetings.
- Expansion Plans To Build 1,000 New Hotel Rooms In 5-Star Category With Global Brands (W, Park Hyatt, St. Regis And Jumeirah).
- Easy Access To Compelling Visitor Experiences At Petra And Wadi Rum, As Well As Beach Resort Experiences..
- The Aseza (Aqaba Special Economic Zone Authority) Founded In 2005 Could Potentially Work As A Destination Cvb.

- An International Airport With Expanding Connectivity.
- According To Hotel Interviews, Approximately 10% To 15% Of Aqaba’s Hotel Activity Is Currently Generated By Meetings, Mainly National.

Weaknesses

- Lack Of International Meetings Market Awareness (This Will Improve With The Completion Of The Convention Center).
- Lack Of A Destination Strategy That Integrates Aqaba Into The Rest Of The Country.
- Most Of The Airport Connectivity Is Generated By Package Groups Or International Charters. Very Leisure Oriented Airport.
- Air Connectivity With Amman Is Limited And Complicated

1.3.4 Petra

Strengths

- It Is The Most World-Renowned Tourist Attraction In Jordan.
- Excellent Destination To Complement Meetings Or Incentive Programs.
- Great Geographical Location Located Near Aqaba.
- Good Inventory Of 4 And 5-Star Category Hotel Rooms, With International Standards.

Weaknesses

- It Is A Not Designed (From An Infrastructure or Industry Mindset Perspective) to Host and Execute Meetings.
- Shortage of Compelling Entertainment and Nightlife.

1.4 COMPETITIVE SET PERFORMANCE ANALYSIS

The next section analyzes the 2008-2012 performance results for Jordan and its competitive set in terms of international tourist volumes (overnight visitors), hotels and similar establishments in the country. We define Jordan’s competitive set as:

- Egypt
- Israel
- Morocco
- Qatar
- Saudi Arabia
- Tunisia
- Turkey
- United Arab Emirates

1.4.1 Overnight Visitors

According to the World Tourism Organization, Turkey and Morocco experienced the highest visitor growth rates within Jordan’s competitive set. Turkey shows a 2.3% CAGR (Compound Annual Growth Rate) and a 19.8% cumulative growth when comparing 2012 versus 2008, while Morocco shows 2.2% and 19% respectively.

By comparison, Jordan had a moderate growth, with 1.4% CAGR and 11.6% cumulative growth over the same period²⁰.

Turkey is also the country with the highest number of overnight visitors (35.6 million in 2012), representing a 42% market share within the competitive set, and increasing overall competitive set market share by 5 points from 2008-2012. Saudi Arabia realized 14.2 million overnight visitors in 2012, and a 17% market share. Jordan’s current market share is 5% and has been stable over this period. Despite the political problems in the region, Jordan has realized an 11.6% increase in the number of visitors, a moderate performance achievement (position 4th out of 8 competitors).

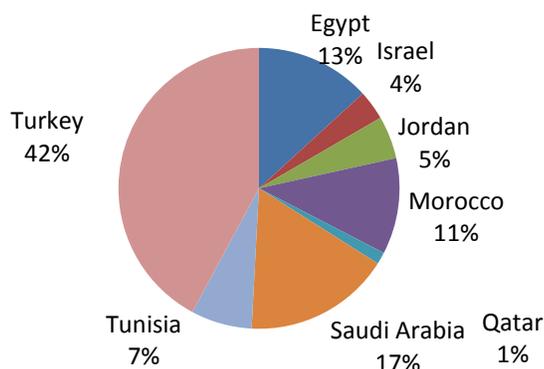
²⁰ World Tourism Organization, 2013a.

Table 12. Overnight Visitors in Jordan and Competitive Set (Thousands), 2008-2012²¹

	2008	2009	2010	2011	2012	CAGR	Var 12/08
Egypt	12,296	11,914	14,051	9,497	11,196	-1.2%	-8.9%
Israel	2,572	2,321	2,803	2,820	2,886	1.5%	12.2%
Jordan	3,729	3,789	4,207	3,960	4,162	1.4%	11.6%
Morocco	7,879	8,341	9,288	9,342	9,375	2.2%	19.0%
Qatar	1,405	1,659	1,519	2,527	1,170	-2.3%	-16.7%
Saudi Arabia	14,757	10,897	10,850	17,498	14,276	-0.4%	-3.3%
Tunisia	7,050	6,901	6,903	4,785	5,950	-2.1%	-15.6%
Turkey	29,792	30,187	31,364	34,654	35,698	2.3%	19.8%

Source: World Tourism Organization, Compendium.

Figure 12. Market Share of Overnight Visitors - Jordan and Competitive Set, 2012.



Source: World Tourism Organization, Compendium.

1.4.2 Hotel Infrastructure

Qatar and Morocco show the highest growth rates for hotel infrastructure available to visitors. Qatar reports a 6.8% CAGR and a 68.8% cumulative growth in the 2008-2012 period while Morocco shows 4.9% and 46.6% respectively. Jordan's infrastructure stagnated with a 0.3% CAGR and 2.1% in this period²².

Saudi Arabia is the country with the most extensive hotel infrastructure (3,111 in 2012). However it suffered a strong decline of -48% in 2011, compared to 2010. Egypt's infrastructure was severely hit during this period as well, losing 15% of their hotel infrastructure, when comparing 2012 to 2008, equivalent to a -2% CAGR. This situation mirrors the decrease in its international tourist arrivals during this period.

²¹ Data for United Arab Emirates is not available.

²² World Tourism Organization, 2013a.

Table 13. Number of Hotels and Similar Establishments in Jordan and Competitive Set, 2008-2012²³

	2008	2009	2010	2011	2012	CAGR	Var 12/08
Egypt	1,490	1,458	1,473	1,319	1,267	-2.0%	-15.0%
Israel	335	336	332	338	342	0.3%	2.1%
Jordan	468	469	472	474	478	0.3%	2.1%
Morocco	1,720	1,806	2,003	2,188	2,521	4.9%	46.6%
Qatar	48	58	66	74	81	6.8%	68.8%
Saudi Arabia	5,446	5,605	5,828	3,019	3,111	-6.8%	-42.9%
Tunisia	836	856	856	861	846	0.1%	1.2%
Turkey	2,547	2,597	2,414	2,740	2,814	1.3%	10.5%

Source: World Tourism Organization, Compendium.

²³ Data for United Arab Emirates is not available.



1.4.3 International Meetings Industry Performance

According to the International Congress and Convention Association (ICCA), Turkey is the leader in Jordan's competitive set in terms of the total number of meetings. In 2012, Turkey had a total of 179 international meetings, equivalent to 49% of the competitive set total. A distant second is the United Arab Emirates with 63 meetings in 2012 or 17% of the market. Jordan reported 11 international meetings, equivalent to a 3% market share²⁴. An important point to emphasize is the growth that the United Arab Emirates has experienced since 2008 and more importantly since 2010, which corresponds to a 5.2% CAGR and a 50% growth when comparing 2012 to 2008. Non-Arab Spring countries, with well-organized meetings and events industries, benefited as a result of the political instability elsewhere in the region and took advantage of their better-organized industries in order to grow their respective market share.

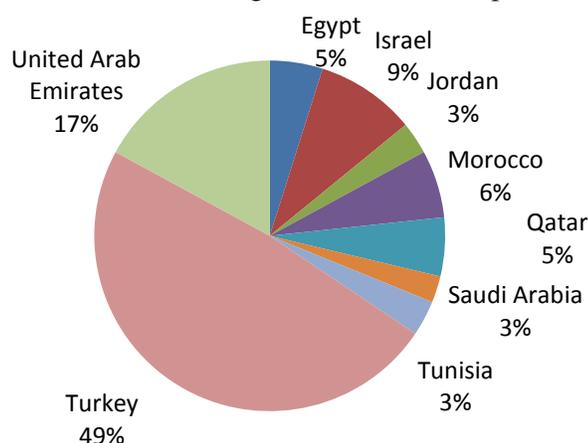
Table 14. Number of Meetings in Jordan and Competitive Set, 2008-2012

	2008	2009	2010	2011	2012	CAGR	Var 12/08
Egypt	45	49	41	21	18	-10.8%	-60.0%
Israel	24	30	40	30	34	4.5%	41.7%
Jordan	8	7	7	12	11	4.1%	37.5%
Morocco	38	43	37	32	23	-6.1%	-39.5%
Qatar	9	15	17	15	20	10.5%	122.2%
Saudi Arabia	2	3	3	4	9	20.7%	350.0%
Tunisia	24	23	21	11	12	-8.3%	-50.0%
Turkey	138	158	199	181	179	3.3%	29.7%
United Arab Emirates	42	47	60	58	63	5.2%	50.0%

Source: International Congress and Convention Association, Destination Comparison Report.

²⁴ International Congress and Convention Association, 2014.

Figure 13. Market Share of Meetings - Jordan and Competitive Set, 2012



Source: International Congress and Convention Association, Destination Comparison Report.

1.4.4 International Meetings Attendance

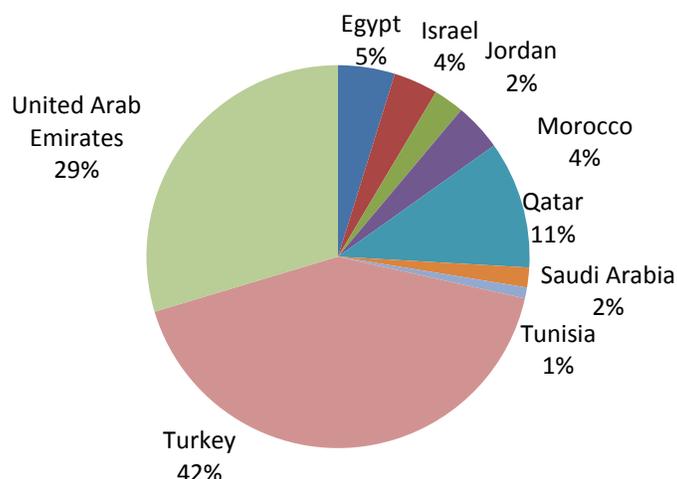
In terms of international meetings attendance, Turkey was the top-performer (81,400 in 2012), followed by the United Arab Emirates (57,600), and Qatar (20,934). However, it is important to mention that Jordan, in spite of having a small percentage of the market share within its competitive set (2%), continued to show strong growth, equivalent to a 14.8% CAGR and a 201.6% variation when comparing 2012 to 2008. This positive growth indicator, despite the industry's structural and marketplace perception issues, is a significant triumph and bodes well for the future if and when those issues get addressed.

Table 15. Number of Participants in Meetings in Jordan and Competitive Set, 2008-2012

	2008	2009	2010	2011	2012	CAGR	Var 12/08
Egypt	15,913	23,147	14,446	10,832	9,316	-6.5%	-41.5%
Israel	5,565	9,499	11,785	5,533	7,290	3.4%	31.0%
Jordan	1,664	1,798	2,313	3,972	5,019	14.8%	201.6%
Morocco	13,553	18,430	15,827	11,537	7,832	-6.6%	-42.2%
Qatar	3,723	8,854	6,650	12,485	20,934	24.1%	462.3%
Saudi Arabia	1,000	1,893	2,260	916	3,252	15.9%	225.2%
Tunisia	11,566	7,613	4,637	2,287	1,802	-20.7%	-84.4%
Turkey	74,685	96,740	86,231	84,679	81,400	1.1%	9.0%
United Arab Emirates	17,899	18,274	25,452	40,876	57,660	15.7%	222.1%

Source: International Congress and Convention Association, Destination Comparison Report.

Figure 14. Market Share of Meetings - Jordan and Competitive Set, 2012



Source: International Congress and Convention Association, Destination Comparison Report.

1.4.5 Competitive Set Assessment

A key assessment element to be addressed is the delineation of Jordan's key meetings industry competition. Based on discussions with Jordan's meetings industry stakeholders and also preliminary responses to our marketplace survey, the most mentioned countries were: Egypt (particularly Sharm el-Sheikh), Turkey, the countries in the GCC (Qatar, Arab Emirates, Dubai and Abu Dhabi) and Israel. The meetings industry in Jordan needs to closely monitor them, learn from them, and improve their own strategies. This table summarizes the current situation of Jordan's direct competitors.

Turkey

- Recent Air Connectivity Investments Have Transformed The Country Into A Regional Hub Affordably Connecting Europe, Asia And America.
- Hotel Prices Are More Affordable Than GCC And Less (But In A Similar Range) Than Jordan. Its Meetings Industry Product Is Well-Developed.
- Turkey Is Positioned As A Key Emerging Economy For The Next Decade Providing Great Context To Attract Meetings.
- Istanbul Has Modern Meeting Industry Infrastructure And Mature And Credible Supplier Resources.
- Very Aggressive Marketplace Activity through Active Convention Bureaus And Industry Stakeholders.
- Consistent Investment for Meetings Industry Promotion.

Egypt

- Currently Affected By Security Issues And Terrorism In Key Tourism Areas.
- Perception Issues Have Resulted In Severe Price-Discounting To Secure Business. (The Average Price Of Hotel Rooms In Sharm El-Sheikh During 2013 Was \$20 Usd Per Night Making It The Least Expensive Destination Of Those Analyzed By The Middle East Benchmark Hotel Report 2013²⁵).

Countries in the GCC (Abu Dhabi, Qatar, Arab Emirates)

- Extensive Collaborative Institutional And Governmental Support Offering Incentives To Associations And Other Groups To Secure Meetings Business.
- Very Strong Global And Regional Air Connectivity Subsidized By Their Respective

²⁵ www.timesofoman.com.

- Governments.
- Outstanding Infrastructure And Supplier Resources
- Expensive Destinations Where the Average Price Of A Hotel Room Is \$150 USD²⁶.
- Very Aggressive Marketplace Activity through Active Convention Bureaus And Industry Stakeholders.

Israel

- Well-Positioned In The Global Marketplace Based On Extensive Track-Record Of Success With Meetings And Events Despite Aging Infrastructure. Mature And Credible Supplier Resources.
- Despite Political Instability And Security Issues, Destination Retains Its Demand Allure.
- Better Air Connectivity And More Competitive Prices Than Jordan.

1.5 SUMMARY OF CONSIDERATIONS FOR JORDAN'S MEETINGS INDUSTRY

STRATEGIC PILLARS

Topic	Situation	Considerations
Leadership	<ul style="list-style-type: none"> The lack of an organized national industry leadership and engagement entity (e.g. convention bureau or strategic business unit) to enable collaboration and planning is inhibiting the development of industry sophistication and marketplace credibility. The absence of a meetings industry leadership and engagement entity inhibits the industry from "speaking with one voice" when dealing with government issues. Direct support from the Jordan Tourism Board is minimal and inconsistent. There are Jordanian business and academic professionals who are interested in bringing international meetings and events to Jordan. Relative to governments in its competitive set, the Jordanian government has no current interest in directly supporting the meetings industry beyond the JTB. There are solid but isolated efforts to organize the industry in the Dead Sea (Destination Dead Sea) and in Aqaba (Aqaba Special Economic Zone Association). 	<ul style="list-style-type: none"> A national meetings industry entity is needed to lead the development of Jordan's meetings industry opportunity through business development, industry education and community engagement. Meetings industry stakeholders should continue to organize themselves without expectations of direct government support. A formal business and academic community outreach initiative should be developed and launched to support local leaders who wish to bring strategically desirable events to Jordan.
Economic Resources and Structure	<ul style="list-style-type: none"> The current 120,000 JD investment by the Jordan Tourism Board is insufficient for traditional convention bureau activities to meet industry needs. There are no current, politically feasible government financial channels/vehicles that could be directly dedicated in the 	<ul style="list-style-type: none"> Meetings industry stakeholders should continue to organize themselves without expectations of additional government financial support. The meetings industry should consider the development of a very

²⁶ www.timesofoman.com, Middle East Benchmark Hotel Report 2013.

	<p>short-term to provide additional financial resources to support the industry.</p>	<p>focused and surgical partnership initiative with the Jordan Tourism Board (within its current budget parameters) to create improved short-term marketplace performance.</p>
Infrastructure	<ul style="list-style-type: none"> • The number of hotel rooms and square meters available for congresses, conferences and exhibitions is appropriate and matches current needs • Planned projects for additional 4 and 5-star hotels and a convention venue will address short/mid-term demand as well as provide a signal to the marketplace that Jordan is committed to the meetings and events opportunity. • Air connectivity is complicated, minimal and expensive. • Explicit meetings industry certification and accreditation is minimal and reflects an immature industry. 	<ul style="list-style-type: none"> • Meetings industry stakeholders need to explore some form of air services development partnership in conjunction with the government, the JTB and other national business and economic development organizations. • The meetings industry needs to make the expansion of meetings industry education and accreditation a priority. This can be explored through partnerships with international meetings industry associations.
Promotion	<ul style="list-style-type: none"> • JTB promotion of the meetings industry is limited to select tradeshow participation. • There is no specific Jordanian meetings industry identity or “story” that leverages or complements an existing national brand. This inhibits the development of a solid and widely understood destination experience value proposition in the marketplace and in the industry. • There is no apparent strategic communications initiative to confront the security misperceptions manifesting in the marketplace that are inhibiting performance. • There are no strategic partnership relationships with key meeting industry association communities to “spread the word”. • There is no meetings-specific research and performance data to measure success. 	<ul style="list-style-type: none"> • The industry, at a minimum, needs to develop explicit messaging around Jordan’s meetings industry value proposition so that all stakeholders can share the same messaging with their clients and community contacts. • The industry needs to collaborate and invest in a strategic communications initiative to address the current marketplace security misperceptions. • Identify key meetings industry organizations with which to develop strategic partnerships. • Work with JTB to find ways to include meetings industry performance data in current research and performance tracking activities.
Engagement	<ul style="list-style-type: none"> • The lack of an industry organization combined with the government’s apparent lack of interest in further support for the tourism industry is contributing to a lack of collaboration and coordination around industry development and ultimately inhibiting marketplace performance. • There are Jordanian business and academic professionals who are interested in bringing international meetings and events to Jordan. 	<ul style="list-style-type: none"> • The industry needs to remain engaged with the government to ensure constant communication. • The industry should collaborate with JTB to raise the public profile of the important role of the meetings industry in the country. • A formal business and academic community outreach initiative should be developed and launched with JTB to support local leaders who wish to bring strategically desirable events to Jordan.

2. TOURISM IN JORDAN AND OTHER INDICATORS

The Hashemite Kingdom of Jordan possesses world-class tourist attractions that offer breathtaking sights topped off by luxurious accommodations and a wide array of cultural activities. These attractions include four sites inscribed on the UNESCO World Heritage List: Petra, Quseir Amra, Um er-Rasas (Kastrom Mefa'a) and the Wadi Rum Protected Area; as well as Mount Nebo, the Dead Sea, and several sites of significant biblical importance. The capital of Jordan, Amman, has a population of more than two million and is the starting point for exploring the Kingdom. The city offers astounding cultural attractions, among them a Roman amphitheater, numerous art galleries, museums and fine restaurants.

Jordan is considered one of the most modern and liberal nations in the Middle East and its political stability has allowed it to remain sheltered from the outbursts of violence that have hit the region in recent times as a consequence of the Arab Spring²⁷. However, the instability in neighboring countries, mainly in Egypt and Syria has considerably affected tourism flows to the Kingdom. In the opinion of Jordan's former Minister of Tourism & Antiquities, this is due to the tourists' misconception that the peaceful protests that have taken place in Jordan are similar to the political turmoil that those countries are experiencing²⁸. As a result, intraregional tourism has been in constant decline as well as medium and long haul trips from Europe and the Americas. Other factors affecting international arrivals have been the economic recession in Europe and the increase in taxes to hotels in Jordan, which stood at 16% as of May 2013.

Tourism is a major contributor to the economy in Jordan. In 2012, the Tourism Direct Gross Value Added²⁹ reached a significant 6.5%. Furthermore, tourism is one of the country's top sources of foreign currency revenues, alongside the remittances from Jordanians working abroad. Tourism also accounts for more than 46,000 direct jobs and an estimated 130,000 indirect jobs in the country³⁰.

Therefore, it is an imperative priority to develop a long-term strategy that increases tourism flows and increases the marketplace attractiveness of Jordan to receive foreign direct investments to develop tourism projects. Jordan currently faces a strong competition from destinations such as the UAE, Saudi Arabia, Morocco, Qatar and Oman in this regard. Foreign direct investment in the Kingdom reached 15.3% of Jordan's GDP in 2007; however, as a result of the global economic slowdown and a higher perception of risks in the region, this figure has been reduced to 5.1% in 2011 (a decrease of 55.2% in real terms) and is expected to continue its decline³¹.

Jordan has undergone an aggressive economic reform program since King Abdullah II assumed his constitutional powers in 1999 and nowadays Jordan ranks 33rd out of 184 countries in terms of its economic freedom, by virtue of its open market, limited government intervention, and strong intellectual property rights. Jordan also became a member of the World Trade Organization in 2000 and signed free trade agreements with the United States and the European Free Trade Association in 2000 and 2001, respectively³².

²⁷ The Arab Spring is an ongoing revolutionary wave of demonstrations and protests, riots, and civil wars in the Arab world that began on 18 December 2010. By December 2013, rulers had been forced from power in Tunisia, Egypt, Libya, and Yemen; civil uprisings had erupted in Bahrain and Syria; major protests had broken out in Algeria, Iraq, Jordan, Kuwait, Morocco, and Sudan; and minor protests had occurred in Mauritania, Oman, Saudi Arabia, Djibouti, Western Sahara, and the Palestinian territories.

²⁸ Al Arabiya, 2011.

²⁹ Value added by all resident industries of Jordan in the provision of goods and services to tourists in response to their expenditure.

³⁰ Central Bank of Jordan, 2012.

³¹ International Monetary Fund, 2013.

³² U.S. Central Intelligence Agency, 2014.



Nevertheless, Jordan is still facing many economic challenges, which include high (albeit decreasing) unemployment rates (12.2%) and a large budgetary deficit, which are deepened by the country's scarce supplies of water, oil and other natural resources. As a result, the Jordanian government has been forced to increase taxation and in 2012, with the assistance of the International Monetary Fund, implemented an economic program that aimed to reduce the budget deficit and mitigate the social impact of the external shocks³³. The IMF expects a GDP growth rate of 3.5% with an inflation rate of 5.9% in Jordan in 2014, although Jordanian analysts criticize these forecasts and expect more modest growth rates³⁴.

³³ International Monetary Fund, 2013.

³⁴ The Jordan Times, 2013.



2.1 TOURISM IN JORDAN

2.1.1 Hotel Activity

During the period 2008-2012, Jordan experienced a 1.3% decrease in the total number of tourist arrivals in hotels and other accommodations, which at the close of 2012 amounted to 5.9 million. As mentioned previously in the document, 2011 was the most negative year for tourism in Jordan (mainly because of the negative effects of the Arab Spring) resulting in a national tourism performance decline of 11.9% in comparison to 2010. Nevertheless, recovery was observed in 2012, rebounding with a 24.3% growth in arrivals³⁵.

It is important to emphasize that both international and domestic arrivals in hotels and other accommodations in Jordan have contracted during the period 2008-2012. However, they exhibit different behaviors.

Domestic arrivals fell in 2009 and reached their lowest point in 2010 (a decrease of 32.4% compared to 2008). In the two subsequent years, they experienced a moderate recovery, totaling 1.08 million tourists in 2012, which corresponds to a net decrease of 16.4% in comparison to 2008³⁶.

International arrivals experienced intermittent results between 2008 and 2012, reaching their lowest point in 2011, corresponding to a 17.2% loss, compared to 2010. A strong recovery is observed in 2012, with 4.8 million international arrivals (a 29% growth compared to 2011 and a 2.9% growth compared to 2008). International arrivals represented 78% of the total arrivals in 2008 to hotels in Jordan. In 2012 this proportion increased 4 percentage points and reached 82%.

³⁵ World Tourism Organization, 2013b. 2013 information has not been published yet by the WTO.

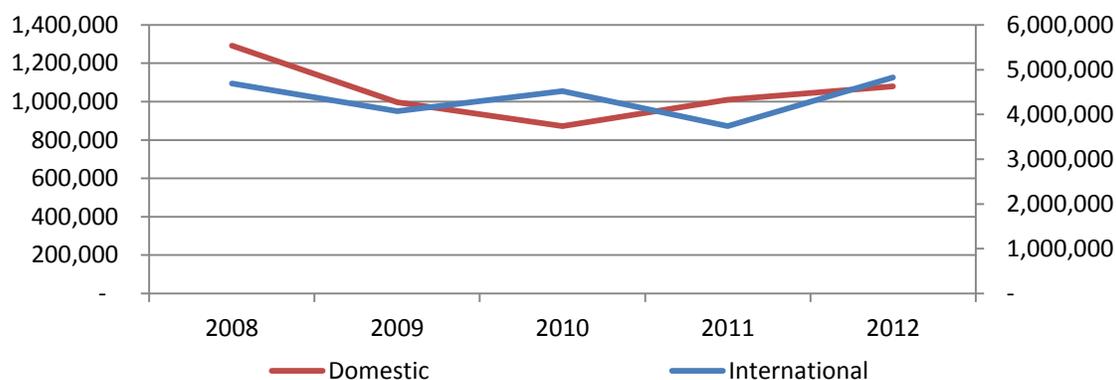
³⁶ Idem.

Table 16. Tourist Arrivals in Hotels and Other Accommodations in Jordan, 2008-2012

	2008	2009	2010	2011	2012
Tourist Arrivals	5,984,000	5,070,000	5,391,000	4,751,000	5,907,000
International	4,692,000	4,073,000	4,518,000	3,741,000	4,827,000
Domestic	1,292,000	997,000	873,000	1,010,000	1,080,000

Source: World Tourism Organization (2013), Basic Indicators.

Figure 15. Tourist Arrivals in Hotels and Other Accommodations in Jordan, 2008-2012



Source: World Tourism Organization (2013), Basic Indicators.

2.1.2 International Tourist Arrivals

International tourist arrivals in Jordan amounted to 3.9 million at year-end 2013, corresponding to a 5% decrease in comparison to 2012³⁷.

Throughout 2013, Saudi Arabia generated the highest number of arrivals in Jordan (547,087) followed by Palestine (382,759), Iraq (321,028), Syria (204,248), Israel (147,232), and the United States (132,996). Together these six countries represent the 44% of total international arrivals in the Kingdom.

It is important to mention that Palestine is the only country from this subset of nationalities that registered growth (4%) between 2012 and 2013. The rest of the countries registered important contractions during this period, being Syria (-35%), Iraq (-13%) and Israel (-10%) the countries the countries with the deepest declines in comparison to 2012.

³⁷ Ministry of Tourism and Antiquities 2013b.

Table 17. International Overnight Tourist Arrivals by Nationality, 2012-2013

Country	2012	2013 ar.	2013/2012
Saudi Arabia	582,037	547,087	-6%
Palestine	367,574	382,759	4%
Iraq	367,476	321,028	-13%
Syria	316,303	204,248	-35%
Israel	162,789	147,232	-10%
U.S.	141,424	132,996	-6%
Libya	97,906	78,911	-19%
U.K.	69,845	67,176	-4%
Egypt	61,251	61,262	0%
India	54,202	49,646	-8%
Lebanon	53,638	49,218	-8%
Yemen	52,585	61,170	16%
Kuwait	49,647	57,034	15%
Germany	47,274	49,595	5%
France	41,812	36,891	-12%
Indonesia	41,149	39,645	-4%
Italy	39,631	39,381	-1%
Canada	28,512	26,144	-8%
Spain	25,764	25,141	-2%
Russia	25,724	22,181	-14%
Jordanians Abroad	1,058,586	1,085,177	3%
Rest of the World	477,238	461,441	-3%
TOTAL	4,162,367	3,945,360	-5%

Source: World Tourism Organization (2013), Compendium of Tourism Statistics. Basic Indicators; Jordanian Ministry of Tourism & Antiquities.

When grouped by region of origin, the Middle East generated the highest number of arrivals in Jordan with 1.86 million, however, this region had a sharp decrease of 7% in 2013 compared to the previous year and a 5% increase compared to 2008³⁸. Europe generates the second-most international tourist arrivals to Jordan. The region registered 536,000 in 2013, corresponding to a 9% decrease in comparison to 2012 and an 18% decrease compared to 2008. During 2011, the poorest performing year for international tourist arrivals, arrivals from Europe registered a contraction of 16% in comparison to 2011, while the Middle East decreased in 8%. This situation could be caused by diverse effects outside tourism. On the one hand, Jordan is characterized as a country receiving refugees due to the conflicts of neighboring countries. The result is the decrease in the quantity of people going to Jordan due to the “Arab Spring” and the complicated situation of neighboring countries. This decrease in Europe could have been caused by the perception of Jordan as an insecure country to travel to.

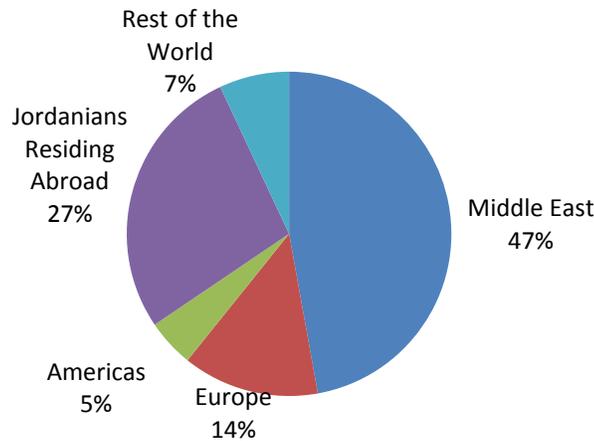
Table 18. International Tourist Arrivals by Region, 2013

	2008	2009	2010	2011	2012	2013	Var. 13/12	Var. 13/08
Americas	200,371	189,776	215,121	189,283	198,631	188,072	-5%	-6%
Europe	657,628	602,394	744,992	626,886	590,204	536,743	-9%	-18%
Middle East	1,777,094	1,867,473	2,054,551	1,892,950	2,007,452	1,860,598	-7%	5%
Jordanians residing abroad	819,025	861,418	928,758	969,361	1,058,586	1,085,177	3%	32%
Rest of the World	269,484	256,569	263,986	281,174	307,494	274,771	-11%	2%
Grand Total	3,723,602	3,777,630	4,207,408	3,959,654	4,162,367	3,945,360	-5%	6%

Source: World Tourism Organization (2013), Compendium of Tourism Statistics. Basic Indicators; Jordanian Ministry of Tourism & Antiquities.

³⁸ World Tourism Organization, 2013b.

Figure 16. International Tourist Arrivals by Region, 2013



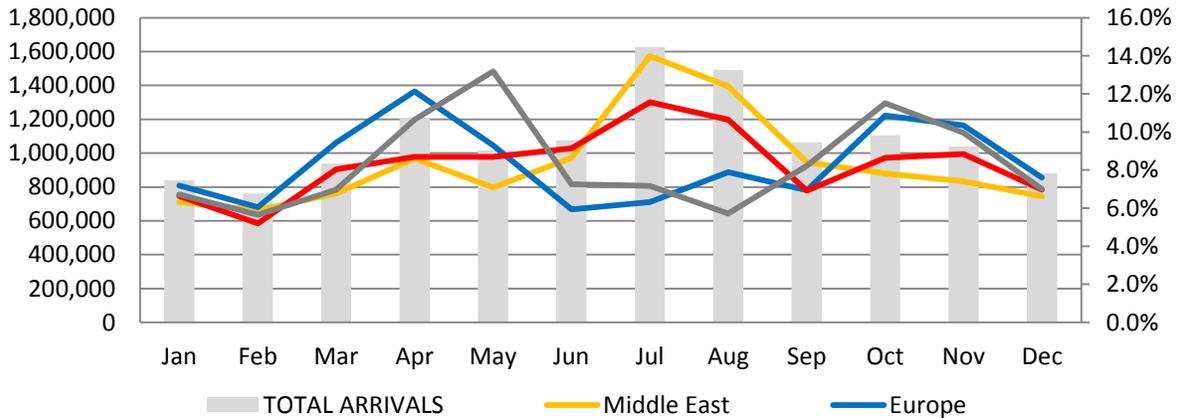
Source: Jordanian Ministry of Tourism & Antiquities.

2.1.3 Seasonality

The seasonality of tourist arrivals from 2008 to 2013 in Jordan shows a very noticeable peak during the summer (July and August concentrate 23.9% of the visits to the country), followed by a secondary season in April (concentrating 9.2% of the visits). Summer traditionally represents the most important season for Middle Eastern and American tourists, whereas April and May, as well as October and November attract the highest percentages of European tourists³⁹.

January and February are the months that concentrate the least percentage (12.3%) of visits from all regions of the world, including the Middle East.

Figure 17. Seasonality of Tourism Arrivals in Jordan by Nationality, 2008-2013



Source: Ministry of Tourism & Antiquities. Tourism Statistical Newsletter

2.1.4 International Tourism Expenditures

The travel expenditure of inbound tourists in Jordan grew 18% from 2008 to 2012, adding up to 3,460 million JD. Nevertheless a considerable decrease of 16% is noticeable during 2011 as a consequence of the contraction of the international tourist arrivals during said year⁴⁰.

³⁹ Ministry of Tourism and Antiquities 2013a.

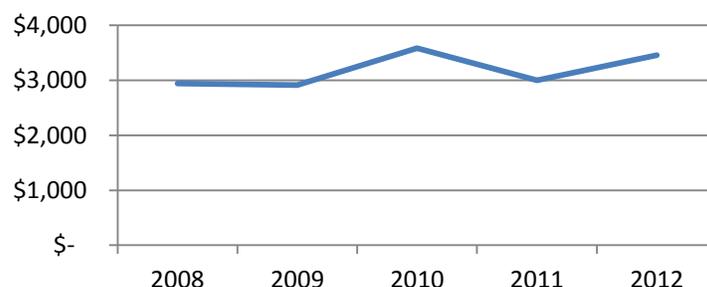
⁴⁰ World Tourism Organization, 2013b.

Table 19. Travel Expenditure of Inbound Tourists, 2008-2012 (million JD)

	2008	2009	2010	2011	2012
Inbound	\$ 2,943	\$ 2,911	\$ 3,585	\$ 3,000	\$ 3,460

Source: World Tourism Organization (2013), Compendium of Tourism Statistics. Basic Indicators.

Figure 18. Travel Expenditure of Inbound Tourists, 2008-2012 (million JD)



Source: World Tourism Organization (2013), Compendium of Tourism Statistics. Basic Indicators.

2.1.5 Occupancy Rates and Average Stay

The occupancy rate in Jordan decreased 13 percentage points between 2008 and 2011, recovering by 9 points in 2012, reaching 50% at the close of that year⁴¹.

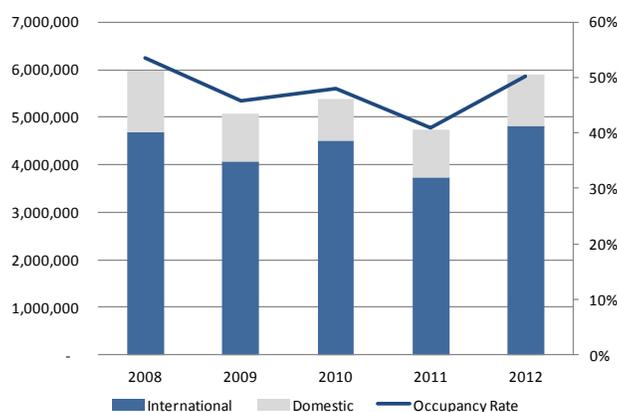
In 2008 tourists visiting Jordan stayed for an average of 2.20 days. In 2012 this number slightly increased to 2.40, presumably due to higher stays of domestic tourists. However, international tourists generally have higher stays than Jordanians, averaging a difference of 2.4 to 2.8 nights between them.

Table 20. Occupancy Rate and Average Stay in Hotels and Other Accommodations in Jordan, 2008-2012

	2008	2009	2010	2011	2012
Occupancy Rate	54%	46%	48%	41%	50%
Average Stay (days)	2.20	2.07	2.00	2.00	2.40
Average Stay (International)	4.40	4.80	4.50	4.30	4.20
Average Stay (Domestic)	2.03	2.00	2.00		

Source: World Tourism Organization (2013), Basic Indicators.

Figure 19. Tourist Arrivals Vs Occupancy Rate of Hotels and Other Accommodations in Jordan, 2008-2012



Source: World Tourism Organization (2013), Basic Indicators.

⁴¹ World Tourism Organization, 2013b. 2013 information has not been published yet.

2.1.6 Purpose of Travel

Business and professional visits to Jordan represented 11% of the total visits to the Kingdom in 2008, nevertheless this percentage has been continuously decreasing, and in 2012 they only account for 7% of the visits to the country (296 thousand)⁴².

Table 21. Purpose of travel of Inbound Tourists, 2008-2012 (thousands)

	2008	2009	2010	2011	2012
Holidays, leisure & recreation	1,036	1,058	1,196	1,126	1,183
Other personal purposes	2,296	2,331	2,712	2,553	2,683
Business and professional	397	400	299	281	296

Source: World Tourism Organization (2013), Compendium of Tourism Statistics. Basic Indicators.

2.1.7 Destinations and Touristic Sites

The most visited touristic sites in Jordan in 2013 were Petra (449,000 visitors), Um Qais (208,000), Ajlun (183,000), Jarash (167,000) and Madaba (142,000). It is important to mention that sites such as Petra, Madaba, Mount Nebo and Wadi Rum are significantly more popular among the international than the domestic tourists. In contrast, places such as Um Qais and Ajlun receive a majority of Jordanian tourists⁴³.

Table 22. Visitors to the Top 10 Tourist Sites in Jordan, by Origin, 2013

Tourist Site	International	Domestic	TOTAL
Petra	367,375	81,874	449,249
Um Qais	27,586	180,091	207,677
Ajlun	50,941	132,609	183,550
Jarash	110,953	56,497	167,450
Madaba (Map)	141,981	997	142,978
Mount Nebo	120,252	1,089	121,341
Wadi Rum	82,477	14,786	97,263
Maghtas	54,583	7,571	62,154
Karak	18,118	4,900	23,018
Dead Sea	5,203	5,020	10,223

Source: Ministry of Tourism & Antiquities. Main Tourism Indicators.

In terms of the nights spent at each destination, the most important are the capital city, Amman and the port of Aqaba, which combined represented 2.9 million nights. Nonetheless, the capital had a significant decline in the total number of nights spent by tourists in 2013, which translates to a 34% decrease in comparison to 2012. In contrast, the port of Aqaba had a growth of 24% compared to 2012⁴⁴.

The Dead Sea is an important destination in terms of nights spent by visitors to Jordan and is currently the third most important of the country in this regard, following Amman and Aqaba. A total of 337,000 nights were spent at this destination in 2013, a 6% decrease when comparing to 2012. It is important to mention that while Petra receives a significantly higher number of tourists than the Dead Sea, only a fraction of them (equivalent to 172,000 nights) spent a night in this destination.

⁴² World Tourism Organization, 2013b.

⁴³ Ministry of Tourism and Antiquities, 2013a.

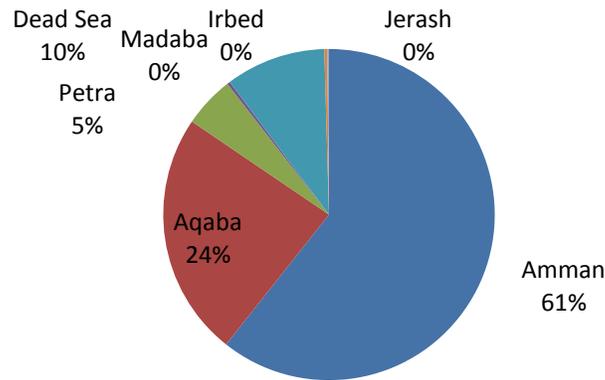
⁴⁴ Ministry of Tourism and Antiquities, 2013a.

Table 23. Nights Spent per Destination, 2012-2013

Destination	2012	2013	Var 13/12
Amman	3,168,668	2,094,359	-34%
Aqaba	662,294	822,885	24%
Petra	192,800	172,187	-11%
Madaba	25,898	10,484	-60%
Dead Sea	356,769	336,915	-6%
Irbed	15,776	9,656	-39%
Jerash	6,716	6,001	-11%

Source: Ministry of Tourism & Antiquities. Main Tourism Indicators.

Figure 20. Nights Spent per Destination, 2012-2013



Source: Ministry of Tourism & Antiquities. Main Tourism Indicators.

2.1.8 Employment in the Tourism Sector

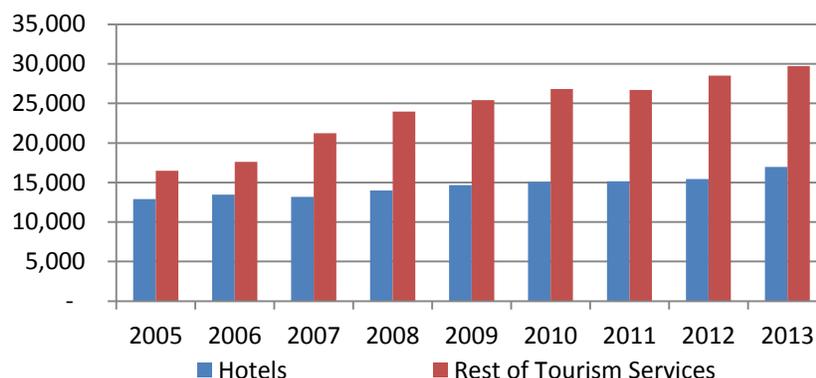
Tourism accounts for 16,900 jobs in hotels and 29,700 in the rest of Jordan's tourism services, totalizing more than 46,000 direct jobs in the country (Jordan Tourism Board, 2013). Employment in this sector has experienced a constant growth since 2005, with the exception of 2011 when employment fell 0.1% in comparison to 2010. From 2005 to 2013 employment in the tourism sector had a compound annual growth rate of 6%. Hotel jobs presented a CAGR (Compound Annual Growth Rate) of 3.5% while the rest of tourism services grew at 7.6%.

Table 24. Employees in Hotels and Other Tourism Services in Jordan, 2005-2013

	2005	2006	2007	2008	2009	2010	2011	2012	2013
Hotels	12,884	13,450	13,193	13,994	14,690	15,080	15,174	15,419	16,960
Rest of Tourism Services	16,500	17,613	21,212	23,972	25,402	26,820	26,705	28,523	29,707
Total	29,384	31,063	34,405	37,966	40,092	41,900	41,879	43,942	46,667

Source: Jordanian Ministry of Tourism & Antiquities. Tourism Statistical Newsletter, 2013.

Figure 21. Employees in Hotels and Other Tourism Services in Jordan, 2005-2013



Source: Jordanian Ministry of Tourism & Antiquities. Tourism Statistical Newsletter, 2013.

Employment in the tourism sector is highly concentrated in the capital, where 70% of the jobs are located. The remaining jobs are concentrated in Aqaba (10%), the Dead Sea (6%), Petra (4%), and the rest of the country (10%)⁴⁵.

Table 25. Employees in Hotels and Other Tourism Services in Jordan per Tourist Destination, 2013

Destination	Employees
Amman	32,706
Aqaba	4,845
Dead Sea	2,804
Petra	1,804
Rest of Destinations	4,508

Source: Jordanian Ministry of Tourism & Antiquities. Tourism Statistical Newsletter, 2013.

2.2 TOURISM IN THE WORLD

2.2.1 International Tourist Arrivals

The UN World Tourism Organization reports that the volume of international tourist arrivals grew by 5% in 2013, achieving a record number of 1,087 million⁴⁶.

According to UNWTO's Secretary General, Taleb Rifai, "2013 was an excellent year for international tourism. The tourism sector has shown a remarkable capacity to adjust to the changing market conditions, fuelling growth and job creation around the world, despite the lingering economic and geopolitical challenges. Indeed, tourism has been among the few sectors generating positive news for many economies"⁴⁷.

The Middle East however showed mixed results during 2013. International tourist arrivals stagnated at 52 million, which represents 5% of the world total. The United Arab Emirates and Oman reported strong positive results during 2013 (10% growth), due to the events and exhibitions they hosted during the year, and the investment in airport infrastructure. Other destinations such as Oman and Palestine reported positive results (6% and 4% growth respectively).

Several other destinations suffered important declines in their tourist arrivals. These are the cases of Egypt (-18%), Saudi Arabia (-7%), Lebanon (-7%) and Jordan (-6%). The UNWTO emphasizes that the main

⁴⁵ Ministry of Tourism and Antiquities 2013a.

⁴⁶ World Tourism Organization, 2014a.

⁴⁷ Idem.

contributing factors behind these negative results are the concerns behind the Middle East Respiratory Coronavirus (MERS), and the conflict in Syria.

2.2.2 Forecasts and Expectations For 2014

The UNWTO expects international tourist arrivals to grow by 4% to 4.5% in 2014, which is above the long term forecast of a yearly 3.8% between 2010 and 2020. This is based on the results from the UNWTO Confidence Index, surveyed with experts worldwide⁴⁸.

“The positive results of 2013, and the expected global economic improvement in 2014, set the scene for another positive year for international tourism. Against this backdrop, UNWTO calls upon national governments to increasingly set up national strategies that support the sector and to deliver on their commitment to fair and sustainable growth.”⁴⁹

There is much optimism among UNWTO Experts from the Middle East and they expect very positive yet volatile results in the region, even outperforming the rest of the world. The Middle East is expected to grow between 0% and 5% in 2014 as some countries recover from the negative factors mentioned earlier in the document and others continue consolidating their tourism industries.

2.2.3 Country Rankings

At the close of 2012, few movements were registered in the top ten ranking list of tourist arrivals of the UNWTO. France is situated in the first position with 83 million, Germany climbed up one place to the seventh position, and the Russian Federation entered the charts at number 9. According international tourist receipts, Macao and Hong Kong moved up the list to the 5th and 9th positions respectively⁵⁰.

Table 26. UNWTO Country Rankings (International Tourist Arrivals and International Tourist Receipts), 2012

Rank	Country	Arrivals 2012 (million)	Var. 12/11	Rank	Country	Receipts 2012 (US\$ Billion)	Var. 12/11
1	France	83	1.8%	1	United States	126.2	9.2%
2	United States	66.6	6.2%	2	Spain	55.9	-6.6%
3	China	57.7	0.9%	3	France	53.7	-1.5%
4	Spain	57.7	2.7%	4	China	50	3.2%
5	Italy	46.4	0.5%	5	Italy	43.7	13.7%
6	Turkey	35.7	3.0%	6	Macao (China)	41.2	-4.2%
7	Germany	30.4	7.3%	7	Germany	38.1	1.9%
8	United Kingdom	29.3	-0.1%	8	United Kingdom	36.4	3.7%
9	Russia	25.7	13.4%	9	Hong Kong	31.1	16.0%
10	Malaysia	25	1.3%	10	Australia	31.5	0.2%

Source: World Tourism Organization.

2.2.4 Tourist-Issuing Markets

According to the UNWTO China has consolidated the largest outbound market in the world. In 2012 China spent 102 billion USD surpassing the United States and Germany (with 84 billion USD each), and in the first three quarters of 2013 it reported a 28% growth⁵¹.

The organization emphasizes the growth in expenditures that the Russian Federation (+26%) and other emerging markets reported in the first three quarters of 2013 (as opposed to the modest results reported by advanced economy markets such as France, US, UK, Canada and Australia). Emerging countries include Turkey (+24%), Qatar (+18%) and Kuwait (+15%) among others. Therefore, it affirms that tourism growth will be strongly driven in 2014 by emerging markets.

⁴⁸ Idem.

⁴⁹ Idem.

⁵⁰ World Tourism Organization, 2014a.

⁵¹ World Tourism Organization, 2014b.

2.2.5 Accommodations

The online travel agency Hotels.com publishes a yearly document including regarding room prices in the main destinations worldwide, in which, an analysis of the final selling prices per room is made in accordance to the published prices⁵².

The following conclusions are drawn from the latest publication⁵³:

- The average price per room worldwide grew 3% during 2012, compared to the previous year.
- Egypt is recovering well from the losses reported during the Arab Spring, although hotel spending in the country is below expectations. The Red Sea resorts such as Sharm-El-Sheikh reported higher prices.
- Hotel prices in the Middle East demonstrated a slight improvement in 2013 compared to 2012, with a 1% rise, however prices in the region are still lower than their 2006 levels.
- European customers are increasingly taking shorter haul trips during the past few years.
- Dubai continues to experience the highest growth in the Middle East with a record number of visitors. The city expects to double its numbers from 10 million in 2012 to 20 million in 2020. Hotel prices in Dubai grew 6%. Hotels.com's analysts believe that the construction of the new giant airport terminal in Dubai was instrumental for this success. This terminal only receives the new Airbus A380 super-jumbos, and with this strategy, Dubai plans on becoming the world's busiest airport by 2015.
- In contrast, Abu Dhabi and Doha's rates fell 3% and 2% respectively.
- Other destinations such as Marrakech and Jerusalem experienced an increase in their prices (24% and 9% respectively).

⁵² The real prices paid by customers are determined by using an average of the quantity of sold rooms in each of the markets in which the agency operates. It includes hotel chains as well as independent hotels and other accommodations including Bed & Breakfast establishments and others. More than 200 thousand hotels worldwide are included in this analysis.

⁵³ Hotels.com, 2013.

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APPENDIX I

Jordan Meetings, Incentives, Conventions, And
Exhibitions Development Project
First Field Trip
25/Feb-05/Mar

List of Interviews and Visits

NAME	INSTITUTION	KIND OF VISIT
Harun Dursun Lydia Peridakis Alli Abdurahman	Grand Hyatt Amman	Interview And Site Inspection
Giuseppe Ressa Alaa Farraj	Le Meridien Hotel Amman	Interview And Site Inspection
Hisham Al-Ansari Sara Al-Jamel	Le Royal Hotel Amman	Interview And Site Inspection
Awni Kawar Mazen Kawar Simon T. Massis	Petra Travel And Tourism	Interview
Seif Saudi	Jordan Select Tours	Interview
Lana Al Sakka Ousama Issa	I Jordan	Interview
Luma Al-Khatib	Jordan Tourism Board	Interview
Siham Gammoh	Jordan Tourism Board	Interview
Lina Al-Adnani	Jordan Tourism Board	Interview
Ismail Matalka	Jordan University Of Science And Technology	Interview
Amjad Sawalha Sa'ed Zawaideh	Usaid – Sustainable Tourism Project	Interview
Ibtisam Abu El-Samid Mohammad Almaghaireh	Civil Aviation Regulatory Commission	Inteview
Fawzi Al-Hammouri	Jordan Private Hospitals Association	Inteview
Eyad F. Halabi	Saraya Aqaba	Interview
Yazan Hijazeen Tarek Madanat	Kempinski Hotel Aqaba	Interview And Site Inspection
Mazen Abu Sakha Wissam Shubat	Intercontinental Hotel Aqaba	Interview And Site Inspection
Jan Heesbeen	King Hussein Bin Talal Convention Center In De Sea	Interview And Site Inspection
Peter Hoesli	Movenpick Dead Sea	Interview And Site Inspection
Naji Abdulghani	Kempinski Hotel Dead Sea	Interview And Site Inspection
Firas Irsheidat Saeed Is'Hagat Ramzi Ammari	Intercontinental Hotel Dead Sea	Interview And Site Inspection
Adedrabo Twaissi	Movenpick Petra	Interview And Site Inspection

APPENDIX II

Jordan Meetings Incentives Conventions
Exhibitions Development Project
First Field Trip
25/Feb-05/Mar
Topics Guide

Introduction:

- Acknowledgment for receiving us.
- Who we are and who are the sponsors of the project.
- Explain the objectives of the study and what we are doing.
- Confidentiality of the answers.

General Questions:

1. How would you describe the present situation of the tourism industry in Jordan?
2. What would you say about the meetings or the MICE industry (Meetings, incentives Conference and Exhibitions) in Jordan?
3. What do you think are the major strengths of the MICE Industry? (at national and local level).
4. What are, in your opinion, the weaknesses of the industry? (at national and local level).
5. How would you describe the short, medium and long term for the tourism in general, and for the meetings industry in particular? Do you think the markets will growth? The country will capture more events? More tourists?
6. Do you think that the situation with the neighboring countries is affecting or helping the tourism and meetings industry in Jordan?

Meetings in Jordan:

7. What kind of meetings are you getting right now? (Congresses, conferences, exhibitions, incentives, seminars, retreats – national, international, regional, world) (Ask for percentages).
8. Why do you think a foreign association, corporation, meeting planner or any other player would consider bringing a meeting into Jordan and to your hotel/destination/convention center?
9. How do you promote your hotel/destination/convention center? What kind of channels are you using?
10. Are these strategies have been working for you? Which are the more successful? What would you change?
11. Where are you prospecting? (Europe, America, Arab countries, Asia, which particular markets?)
12. Do you think that Jordan or your hotel/destination/convention center could capture a bigger number of events? What do you believe is the most exciting/interesting aspect of Jordan's MICE experience?
13. What would you do to attract more meetings to Jordan or to your hotel/destination/ convention center?
14. Who do you think are the direct international competitors for MICE business? What are they doing worth to adapt to Jordan or to copy?

Infrastructure:

15. Do you think Jordan has enough infrastructure to receive international meetings (meeting rooms, conventions centers, room hotels, air seats and connectivity, international airports, cultural and natural attractions, among others)? What is missing?
16. What is the government doing in order to bring more meetings to the country?
17. Have you received any support from the government to promote, prospect or to bring meetings to your hotel/destination/convention center?
18. What the other stakeholders should do in order to bring more events to Jordan?

Human Resources:

19. In your team, do you have personnel specialized or certified in meeting organization? (CMM, CMP, meetings planners, etc).
20. What professional experiences or background do people working with you have?
21. What kind of training does the industry need?

Any other topics you would like to mention?

Thanks a lot for you time.

End of the Interview.