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TECHNICAL FEASIBILITY STUDIES V PROJECT: TOURISM MARKETING STRATEGY

(Project No. 278-0291)

Project No. 940-0001
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IQC for Worldwide Technical Assistance
in Private Enterprise

Prepared for:
U.S. AGENCY FOR
INTERNATIONAL DEVELOPMENT
Amman, Jordan

CHEMONICS

Submitted by:
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INTERNATIONAL
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USAID/Amman
American Embassy
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Reference: Delivery Order No. 11, Contract No. PCE-0001-I-00-2051-00, Tourism Marketing Strategy

Dear Mr. Fulgham:

Chemonics International is pleased to submit the final report on the technical feasibility study for the Jordan Tourism Development project. The document includes an action plan and promotion strategies focusing on the cultural tourism segment of Jordan's tourism sector. Also enclosed with the report, as you requested, is a draft exit survey attached as Annex E.

We thank you for this opportunity to contribute to the project and hope our report meets your expectations.

Sincerely,

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EXECUTIVE SUMMARY

Current arrivals in Jordan from the 20-country Target Group, as defined by the project, are expected to reach approximately 110,000 in 1993, according to MOTA statistics, surpassing tourist arrivals in the peak year 1989.

Jordan's prospects for future visitor arrivals (tourists and others) will be far more dependent on intervening events than on tourism trends. Opening the borders to the West either through a successful peace process, an interim agreement on return of part of the occupied territories, or a significant easing of visitor flows from the West could dramatically change the dynamics of tourism in the region.

Italy, Germany, United Kingdom, and France should be the primary focus of the USAID-funded portion of Jordan's marketing program. While increased marketing and promotion will increase the number of discretionary visitors, such efforts will not, on their own, create a sustainable tourism economic sector. Other project strategies are therefore designed to assure the sustainability of gains made by marketing and promotion activities. Site development strategies are intended to begin building a tourism sector that will continue to be a significant contributor to the Kingdom's foreign exchange earnings well into the next century.

For marketing purposes, the project should consider Amman and Petra as the two focal points (hubs) of tourism in Jordan. Contingency marketing plans will need to consider the eventuality that Jerusalem could become a hub of considerable importance, perhaps rivaling Amman as a port of entry for Jordanian tourists.

Responsibilities of JTB and MOTA can best be dealt with conceptually as "external" (marketing) and "internal" (production). That is, JTB should be responsible for getting tourists to Jordanian ports of entry and MOTA should take over from there.

A JTB secretariat consisting of a marketing coordinator (U.S., 4-5 years), earned media professional (U.S., 2 years), marketing communications director (Jordanian), direct sales professional (Jordanian), and administrative assistant (Jordanian) should be created. In addition, the project should anticipate the need for TDY assistance. The proposed marketing strategy also contemplates the need for Jordan to have a resident marketing representative in each of its four primary target markets.

While the themes initially developed for the project adequately define tourism product groupings, none will work well for promotional purposes. An American multinational advertising/marketing firm would be the most appropriate contractor to develop and pretest "popular" versions of the themes identified by the project.

The project's proposed touring route concepts should be tested for marketability before print materials are developed. Separate familiarization trips for tour packagers should be conducted for each primary target market to identify individual route refinements needed to make the selected themed routes saleable to each market's travelers.

Among the most important sales tools to be developed is a tour planning guide aimed at providing tour packagers and tour operators with all the information they will need to organize theme-related tours to Jordan for the package tour market. The second important sales support tool should be a series of rack brochures promoting the project themes and suggested routes. It would be preferable to print each of these brochures in Italian, German, and French.

The tactics to be used to directly develop image and awareness should include direct mail and scheduled and opportunistic press releases to travel trade and selected consumer print media in primary target markets; scheduled and opportunistic press releases to travel trade and selected consumer print media in secondary target markets; and travel trade communications (scheduled press releases only) in markets of opportunity.

Since regional political events have disrupted Jordan's tourism economy with such regularity in the past, it is clearly essential to have a workable damage control strategy ready to implement whenever similar events occur in the future. Key elements of the plan should include: up-to-date information distribution lists, initially for the target market group (names, addresses, telephone and fax numbers, etc.), and an agreed-upon implementation strategy that includes preassigned responsibilities for implementation.

The potentially high-impact and relatively low-cost proposed earned media strategy will rely on persistent and opportunistic exploitation of events incidentally related to tourism (visits to target markets by the King, new discoveries of antiquities, etc.) and a planned, scheduled, and managed press release program. The earned media strategy anticipates the development of a 15-minute video program for market testing in a single primary target in year two.

Key to the direct sales strategy is paid advertising in travel trade publications. In primary target markets, the advertising messages should be aimed at generating inquiries for information on Jordan from travel agents and tour operators, to be followed up by JTB in-market representatives. Sales missions to primary markets and participation on key European trade shows will also be required.

An annual national conference should be designed to bring together the tourism sector (public and private) with various representatives of other sectors of government and interest groups to discuss problems and opportunities in the tourism arena.

As with any marketing effort, the proposed initiative will have to be monitored and progress measured. Baseline survey data must be collected before marketing initiatives begin (year one). The baseline survey should be repeated in year four of the project, assuming no intervening events disrupt market development.

SECTION I

MARKET GOALS AND OBJECTIVES

SECTION I
MARKETING GOALS AND OBJECTIVES

A. Introduction

As part of the Jordan Tourism Development project (project No. 278-0291), Chemonics International, under its Private Enterprise Indefinite Quantity Contract (IQC), was asked to provde a tourism marketing specialist to perform a technical feasibility study of Jordan's tourism market. Chemonics selected Thomas G. Lloyd, a senior tourism marketing professional, to perform the study. Mr. Lloyd was asked to:

- Classify Jordan's tourist attractions and evaluate their potential
- Evaluate Jordan's principal international markets for tourism
- Prepare a competitive analysis of the international tourism environment for Jordan
- Identify potential international test markets for selected Jordanian themes
- Evaluate current promotion techniques and recommend service improvements
- Provide input on JTB staffing

After discussions with USAID/Jordan, the Jordan Tourism Board (JTB), the Government of Jordan (GOJ), and tourism entrepreneurs, it became clear that "cultural tourism"—the market segment focused on Jordan's antiquities—was the parties' principal area of interest. The cultural tourism market, which represents about 7-8 percent of Jordan's overall tourism market, therefore became the focus of the study.

This report presents the findings in the areas outlined in the scope of work and includes a cultural tourism promotion action plan. Recommended marketing goals and objectives for USAID assistance to JTB and the Ministry of Tourism and Antiquities (MOTA) are summarized below.

B. Marketing Goals

- Assist the Jordan Tourism Board (JTB) in its efforts to protect and maintain market share in top 20 non-Arab generating markets (excluding Turkey).

- Assist JTB efforts to increase selective international tourism arrivals from target generating markets 100 percent by the year 2000.

- Assist JTB's efforts to increase selected tourist expenditures from non-Arab generating markets 120 percent by the year 2000.

- Support ongoing efforts of the Ministry of Tourism and Antiquities (MOTA) and the JTB to raise travel trade awareness of Jordanian cultural tourism assets in top generating markets.

- Support MOTA and JTB efforts to build a marketable image of Jordan as a world-class cultural tourism destination.

C. Near-term Marketing Objectives

- Assist MOTA and JTB in developing a sustainable communications link with a minimum of 800 potential suppliers of non-Arab tourists to Jordan and a minimum of 250 travel media publications. The purpose of the link would be to communicate realities of tourist safety and security in Jordan and maintain market share, countering market-disrupting general media reports of regional incidents.

- Assist JTB in developing and test marketing tourism resource packaging concepts (i.e., themes, routes, story lines, etc.) and developing marketing support materials to recruit at least 32 additional tour wholesalers in four primary target markets.

- Assist MOTA in improving cultural tourism resources, which have high potential for generating foreign exchange, through significant site improvements at three key cultural tourist attractions and appropriate improvements at other cultural resource areas.

- Assist JTB in developing and implementing additional indirect and direct marketing efforts in targeted markets.

- Support JTB efforts to increase awareness among the travel trade in selected markets and more fully develop the image of Jordan as a cultural tourism destination.

SECTION II

SITUATION ANALYSIS

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A. Market Trends and Prospects

A1. Worldwide Tourism Trends

World Tourism Organization (WTO) estimates for world arrivals for 1992 were 490 million, including tourists and non-tourists as defined by the project. About 10.6 million of these international arrivals were in the Middle East. International arrivals are expected to grow, at an average annual rate of about 8.5 percent, to an estimated 956 million arrivals in the year 2000.

In the five years leading up to 1985, worldwide spending on international travel increased at an annual rate of about 18 percent. Recession and reduced inflation rates in much of the developed world during 1986-1991 caused the average annual growth in spending on international travel to drop to about 14.2 percent.

The projected real growth (excluding inflation and exchange rate fluctuations) in spending on international travel (excluding transportation) is about 5 percent annually, reaching $415 billion in constant dollars by 2000. Current dollar estimates, based on the 1986-1991 annual average rate, would put the year 2000 estimate for international travel expenditures at approximately $850 billion. About $20 billion of this amount, in current dollars, or about $10 billion in 1993 dollars, will be spent in Middle East countries.

A2. Historic Visitor Trends

Arrivals in Jordan from the target group, as defined by the project, are expected to reach approximately 110,000 in 1993, surpassing tourist arrivals in the peak year 1989, according to MOTA statistics. Turkey, a large generator of visitors to Jordan, is considered to be a regional market in Jordan's statistical tabulations, and therefore is not included in this estimate.

According to WTO data, the Middle East share of world travel arrivals in 1990 was about 1.7 percent (excluding Turkey). The Middle East gained an ever larger share of world travel arrivals during the 1960s and 1970s, moving from less than 1 percent (about 0.75 percent) of the total in 1960 to a little over 2 percent in 1980. There has been a slight downward trend in the region's share of international arrivals since 1980.

A3. Future Prospects for Visitors

The Middle East, as a region, can expect a slightly reduced share of international travel arrivals between now and the year 2000. However, growth in the overall size of the international travel market makes such shifts in market share largely irrelevant to individual countries in the region. The pie from which Jordan now takes a 10-15 percent slice will be considerably larger. Jordan's prospects for future visitor arrivals (tourists and others) will be far more dependent on intervening events than on tourism trends. A number of contingencies could impact potential visitor arrivals, and therefore marketing strategies, including:

- Opening the borders to the West (either through a successful peace process, some interim agreement on returning part of the occupied territories, or a significant easing of visitor flows from the West) could dramatically change the dynamics of tourism in the region (i.e., return of the American Holy Land tourists, significant numbers of new packages originating in Israel and Jerusalem, opportunities for new alignments in multi-country tour packages, etc.).

- Continued terrorism against tourists in Egypt could reduce demand in the region, disrupt Egypt-Jordan tour itineraries, or create opportunities for Jordan as a partner in new multi-country Middle East tour alignments.

- Kurdish problems in Turkey could continue to dampen travel demand in that market and, to some extent, the Middle East as a whole, or could lead European tour operators to seek other Middle East product/itineraries to offer to their clients.

- Political changes in Iraq and/or lifting of the international boycott could lead to opportunities for Iraq/Jordan itineraries; etc.

Any number of contingencies can be imagined to change market conditions, opening up challenges to retain existing levels of arrivals or presenting short-term opportunities to increase tourist arrivals in Jordan at the expense of neighbors.

B. Product Identification and Assessment

B1. Background

The Government of Jordan (GOJ) and the tourism private sector have long recognized Jordan's primary tourism resources—antiquities and friendly people. These assets were, of course, the conceptual basis of the Faces and Places of Jordan marketing theme used until recently, and they remain the primary attraction for non-Arab discretionary visitors. The GOJ has now formalized the direction of future marketing efforts with a policy aimed at promoting and investing in cultural tourism as a means of generating much needed foreign exchange earnings. Even though additional policy guidance has been provided, and the policy has some clear but unstated aims, considerable room remains for interpreting exactly what the term "cultural tourism" includes.

The policy appears to deliberately neglect aspects of cultural tourism that overlap with other types of tourism, without specifically banning or discouraging such activities. The experiences common to all segments of the tourism market, including cultural tourism, are

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opportunities to view scenery, opportunities to shop (locally made products and handicrafts as well as bargain goods), opportunities for relaxing water-related activities (beach as well as swimming pools), and opportunities for recreation, adventure, etc. Looking at what European long-haul discretionary travelers actually do on holiday provides a useful framework for assessing Jordan's tourism resources. According to recent survey data (1991):

- About 50-60 percent of European travelers visit historic places (51 percent of Germans, 62 percent of British).

- About 60-70 percent visit scenic landmarks (like Wadi Rum in Jordan) (62 percent of Germans, 67 percent of British).

- About 70-80 percent sample local foods (74 percent of British, 77 percent of Germans, probably less for the French).

- About 75-85 percent take photos of sites visited (73 percent of Germans, 82 percent of British).

- About 65-85 percent shop (68 percent of Germans, 86 percent of British).

- About 75-80 percent sightsee in cities and towns (74 percent of Germans, 80 percent of British).

- About 50-75 percent like to have contact with local people (44 percent of Germans, 73 percent of British).

The cultural tourism segment of the European discretionary travel market will likely reflect higher percentages of interest in visiting historic places and contact with local people, without being significantly different in other areas.

B2. Site/Attraction Assessment Criteria

To select the tourism products to be featured in the marketing and product development programs, the criteria for assessing Jordan's tourism resources must be defined. Assessment of sites, amenities, appropriate mix of products, tourism experience intangibles, etc., is, of course, highly subjective. Jordan's tourism assets are far too numerous to feature all that are obviously appealing to tourists. In this particular assessment, the following marketing criteria were used to assess sites previously identified as historically/ culturally significant and those previously/currently marketed by the private sector.

- Does the product have "magnetism?" Is the site/attraction unique enough to attract residents of key generating markets to Jordan if they were aware of it? (Magnetism builds traffic.)

- Does the product have a "sense of place?" Does the visitor pass through a gate/ entrance? Does passing through the entry produce a sense of arriving in a setting that is significantly different inside from outside? (Good presentation creates value.)

- Is the product setting suitably defined or presented for purposes of charging an admission fee? Will a cultural tourist perceive a value by visiting the site? (Perceived value generates foreign exchange earnings.)

- Is the site part of a cultural tourism context? Does it contribute something unique to an interesting/informative story? Does its story support/refute a popular myth? Is it part of widely reported contemporary history? (A good story adds value to the overall tourism experience and builds referral business.)

- Does it add variety to the mix of tourism experiences in Jordan? Does it change the pace of a touring experience? Does it offer a contrast to other sites? (Variety adds value to tour loops and marginally increases foreign exchange earnings.)

- Does the product offer multiple attributes/experience-enriching diversions? Does it offer scenic vistas? Is it in a romantic setting? Does it have play value? Relaxation-inducing ambiance? Browsing/shopping opportunities? Does it offer opportunities to interact with local peoples? Multiple attributes add value to the site and generate foreign exchange earnings.

B.3. Cultural Resources Unique to Jordan

In the regional context, two important sites—Petra and Qasr Amrah—give Jordan a comparative advantage over other Middle East destinations. Both sites have international stature conferred by their designation as "International Heritage Sites." These two sites are (potentially) Jordan's "jewels in the crown" among its many tourism resources. Petra is recognized and appreciated both in Jordan and in generating markets. Qasr Amrah, on the other hand, is under-appreciated in Jordan and unknown and under-promoted in potential generating markets.

Petra

Petra is currently the only magnet site in Jordan's marketing strategy; however, it is very effective. Petra's power to control the future of Jordan tourism cannot be overstated. It is both Jordan's most important tourism asset and the factor that defines how many tourists visit Jordan in a given year. Since an estimated 90-95 percent of current visitors to Jordan visit Petra, its capacity controls the number of tourists who will ultimately visit Jordan.

Fortunately, a number of strategies are either being actively pursued or seriously considered to increase the potential through-put of visitors during daily peak periods of peak seasons. Other strategies, suggested by the project's tourism promotion action plan, are aimed at spreading demand more evenly over the year. If successful, these strategies will increase annual capacity. Even if strategies are marginally successful, Petra's capacity will not limit the flow of tourists into Jordan during the project. If other strategies not currently contemplated by the GOJ or the project are implemented (opening a second entrance to Petra, developing a repeat visitor market, etc.), Petra will not constrain tourism to Jordan until well into the next century.

Improvements in traffic flows through the Siq should permit about 1,500 visitors/day during peak season. While no detailed carrying capacity study has been made of the site, it is believed that a controlled flow of 1,500 visitors/day through the site will achieve a suitable balance by providing a satisfying visitor experience, avoiding degradation of the antiquities, and maximizing revenue generation. A detailed carrying capacity analysis, with implementation of a sophisticated visitor traffic management system, could perhaps double this estimate.

The visitor traffic management improvements now being developed for phased implementation, combined with development of more shoulder-season and off-season business contemplated by the project's proposed marketing strategies, would accommodate about 450,000 visitor-days/year at Petra. Opening a second entrance to the site and segmenting the site into controlled visitor paths could increase daily site capacity to 2,000 visitors/day, or 550,000 annually. Clearly, annual capacity constraints are not likely to be reached in the near future. However, pressure on daily capacity will continue during peak seasons, perhaps requiring site management improvements beyond those now contemplated.

Continued excavations at the site and restoration of more antiquities will enrich the experience of visitors, extend time spent at the site, and stimulate multiple visits to the site. Such activities should be supported and encouraged, since they can directly and indirectly impact tourism expenditures (foreign exchange earnings).

Qasr Amrah

Qasr Amrah falls short of its potential to attract foreign visitors and extend their stay. The site's small size belies its potential both as a magnet to visitors and as a trip-enriching experience for cultural tourists. That any non-Arab cultural tourism visitor would consider a trip to Jordan without specifically seeking out Arab cultural sites and contact with local peoples—along with other important sites of cultural/historical interest—is implausible.

Qasr Amrah (a hidden treasure among Jordan's cultural tourism resources) has the potential to be the site that drives a thriving market for the Desert Castle Loop. Tours of the Desert Castles have long been part of Jordan's tourism offerings but remain under-marketed, primarily because they do not individually or collectively present well. Tourism professionals in Europe or America would not understand failing to improve, present, and market these resources. Qasr Amrah more than makes up for what it lacks in grandeur and visual impact with such important tourism intangibles as romance, exotic history, mystery, hints of historic decadence, visions of ancient trade routes, etc.

The project does not contemplate significant investment in site improvements at Qasr Amrah, other Desert Castles, the Azraq Fort (Qasr Azraq), or other tourism facilities along the Desert Castle Loop. However, MOTA should be encouraged to continue to make needed management and facilities improvements at these attractions, particularly Qasr Amrah, so that the Desert Castle Loop can be more prominently featured in future promotions of Jordan's mix of attractions.

Among the improvements ultimately needed at Qasr Amrah and Qasr al-Kharaneh (and perhaps other castles/forts/hunting lodges not visited on the marketing strategy site inspection trip) are:

- Stone walls to replace site security fences
- Small visitor center at Qasr Amrah, including ticket booth to collect entrance fee, site interpretation displays, and guide book and handicraft vending area
- Small rest house or kiosk for snacks and cold drinks
- Shaded areas for visitors (initially indigenous tents erected on existing concrete slabs at both sites would do)
- Restoration of a portion of the gardens reported to have existed in antiquity (requires solving existing water supply problems or subsidizing the cost of hauling and storing water)
- Installation of western toilets (Turkish toilets now exist at both sites)
- Information signs to explain each site and room at both sites and at Qasr Amrah to interpret frescoes, etc.

The potential of Qasr Amrah and/or the Desert Castles collectively to generate significant foreign exchange earnings is likely to be limited for some time. Revenues from entrance fees to individual castles (or preferably, a pass that covers admission to any and all Desert Castles) will, at best, be relatively small and offset by site security and operating expenses in the near-term. However, as traffic to and between castles builds (as it will with proper presentation and promotion), the private sector will likely respond by providing shopping opportunities and diversions (camel rides, etc.) at and near sites, thereby increasing foreign exchange earnings.

B.4. Tourism Magnet Attractions

Jordan currently has two magnet sites, Petra and the Red Sea. A magnet site is one which, when known in a generating market, motivates its residents to visit a destination primarily to visit that site. Other sites in Jordan might, under certain circumstances, become magnet sites. These include Jerash, Qasr Amrah (in combination with other Desert Castles), and the Dead Sea. Beyond these magnets and potential magnets, developing the tourism sector must rely on groupings of "visit-enhancing" sites and experiences that can help define a visitor's planned length of stay.

Petra and Qasr Amrah have been discussed above. The Red Sea (Aqaba) and the Dead Sea have been temporarily removed from promotion strategy consideration by policy (the Red Sea), imposed constraints on development (Dead Sea), or both. These conditions dictate the use of Petra and, to a lesser extent, Jerash, as the viable magnet sites for promotional purposes.

Petra

Petra has been further discussed on pages II-4 and 5, under Cultural Resources Unique to Jordan. The problems at Petra currently receiving the most attention from the GOJ and interested parties at the site are management of visitor traffic through the Siq and issues related to the current mix of equestrians and pedestrians at this access choke-point. Even though too many cooks have their spoons in this pot, the problem will be solved over time. Since this issue has no marketing significance at present and does not constrain the attraction's ability to generate considerable foreign exchange earnings, the project need not concern itself with what is essentially a housekeeping issue, however socially/politically complex.

An issue of significance to foreign exchange earnings is the lack of sufficient available overnight accommodations near the site. Private sector initiatives are well on their way to solving a shortage of lodging facilities that could constrain marketing strategies to increase visitor length of stay in Jordan and build shoulder-season visitation. It is likely that the Petra area will suffer from an oversupply of accommodations in the near-term, given the number of lodging facilities currently under construction and planned. This is a recurring problem in the lodging industry in many parts of the world that will be sorted out by market forces.

Top priority near-term improvements needed at Petra to enhance revenue generation and quality of the tourism experience are:

- Identification of paths and trails that will allow the maximum number of visitors to experience the main features of the site, while preserving the quality of the experience and improving the surface of these paths to ensure safety and expedite visitor flows.

- Information signs to identify and explain each major component of the site.

- Completion of the existing visitor center, including an exhibition area to explain this large and complex site, a visitor information area to distribute and sell print materials on Petra and other cultural attractions in Jordan, and vendor areas to sell handicrafts and quality reproductions of Jordanian antiquities (different product mix than sold by existing local vendors).

- Toilet facilities within the site.

- Non-permanent shaded areas for visitors (perhaps indigenous tents) dispersed throughout the site, with vendors restricted to areas near such rest areas.

- Further restoration and excavation (open to view by visitors) to induce visitors to return to see the changes.

Red Sea (Aqaba area)

The current GOJ policy not to promote the Aqaba area will only minimally reduce the interest of cultural tourists in visiting the Red Sea while in Jordan. Sightseeing is a rigorous activity, particularly in hot weather, which creates a demand for rest and relaxation in the mix of trip activities. While a traveler can be cooled by a dip in a hotel pool, tourists can not be convinced that the atmosphere at pool-side provides the same therapeutic relaxation as the sound of waves. Another force working against GOJ policy is the international reputation of the Red Sea for exotic fish and well-developed coral formations. Cultural tourists, by definition, are presumed to have a greater intellectual curiosity than many other subsets of tourists, and therefore will be slightly more difficult to dissuade from visiting Aqaba. Adding to the magnetism of the Aqaba area are the restoration of Ayla, the Museum (the collection and the building), the Aquarium at the Marine Sciences Center, and diversions such as a day-trip to Pharaoh's Island, glass-bottom boat trips, snorkeling, etc.

Government policy is probably correct in discouraging the private sector from developing the beaches south of the Port of Aqaba as a seaside resort. The Aqaba area, with about 800 hotel rooms, is far behind Eilat, with over 3,500 hotel rooms (about as many international-quality rooms as Amman has), in attracting upscale international resort traffic. Investment demands would be considerable and are more urgently needed elsewhere in Jordan.

Qasr Amrah

Qasr Amrah could eventually become a tourism magnet attraction (packaged with other Desert Castles). This site has been discussed above (see Section B3., Cultural Resources Unique to Jordan).

Jerash

While Petra has long had visibility in generating markets because of its comparative advantage (no other country has or can develop a site like it), Jerash has neither visibility, reputation in generating markets, nor any serious claim to comparative advantage (there are other colonial Roman cities in the Middle East). Nonetheless, Jerash is Jordan's second most important cultural attraction. It probably is a magnet attraction in some generating markets and could be one in most key markets if aggressively promoted.

Jerash is an extensive site that requires about three hours to cover the key points of interest. It has considerable revenue generating potential that should be exploited through proposed promotional strategies. Like most cultural sites in Jordan, Jerash lacks adequate visitor information (identification and explanation of key elements) and suffers from indifferent housekeeping. Opportunities to photograph the site are corrupted at every turn because much of the heart of the ancient city is used to store props for the Jerash Festival.

From a marketing standpoint, Jerash is currently positioned as a half-day tour out of Amman. It is anticipated that project marketing efforts will offer the site as the highlight of a longer tour, packaged with other ancient cities of the Decapolis. The private sector (JETT Bus and competitors after 1994) will likely continue to offer half-day trips to Jerash.

If border restrictions (between the East and West Bank) are eased or fully lifted, with or without a completely successful peace process, a good deal of visitor traffic to the site will originate in Jerusalem in addition to Amman. The added travel time from the West Bank will make Jerash a bit of a reach for a half-day trip. This will create additional demand for a longer Decapolis tour, with a full-day tour to Jerash (with a meal and perhaps an additional sightseeing stop to make it a full day), and for hotel space in Jerash. Each of these alternatives supports the project's goal of increasing foreign earnings. There are currently two international quality restaurants in Jerash that would likely benefit from the border-opening scenario.

The private sector should be encouraged to open a hotel in Jerash large enough to accommodate tour groups (about 80 rooms with pool). This hotel would make it possible to market Jerash during the summer season when it is too hot on the site midday. The hotel would make it possible to visit the site early in the morning or late in the afternoon when the weather is pleasant, including an overnight stay at one end or the other. The town of Jerash offers enough modest diversions (mixing with the local population in the souq, active archaeological digs, out-of-hotel dining, etc.) to be packaged as part of the Jerash experience. With the reinstitution of a quality sound and light show (marginally viable without the hotel) and a hotel in town, Jerash could become a significant magnet attraction.

Dead Sea

The final attraction that has potential to become a magnet for tourism traffic to Jordan is the Dead Sea. Hotel development on the western shore of the Dead Sea offers a convincing argument for the sea's ability to attract foreign visitors. Opening the Amman-Aqaba road along the Dead Sea (reported to be opened in 1994) will attract attention to this high potential tourism resource. Both general tourism and health tourism have potential here. The government appears ambivalent about developing this resource at present, so including it in the product mix for cultural tourism development or marketing is of little use.

B.5. Jordan's Gateway and Satellite Attractions

Important attractions in and near Amman (currently the gateway for most non-Arab arrivals) are the sites with the greatest potential for cultural tourism foreign exchange earnings. Proximity to the primary port of entry, or location within Amman, assure these sites the highest potential levels of visitation, except for the Kingdom's magnet attractions discussed above. Relatively few cultural tourists will come to Jordan primarily to see any one or a collection of these sites. Visitors are motivated to visit Jordan by the magnet attractions but will visit many other sites to enrich their trip. Such sites could be called "trip enriching attractions," "special interest sites," "impulse sites," etc. In Jordan's case, these sites would include the Amman Citadel, Madaba, Salt, and perhaps others.

Amman Citadel

This in-town attraction has a lot to recommend it as a potential high-traffic cultural tourism revenue generator, but probably not for two to three years. While standing ruins (Umayyad Palace and the Temple of Hercules) are impressive, other factors mitigate against long visitor stays at the site: excavations to expose the ancient walls of the Citadel are not yet complete, the museum needs renovation (perhaps ready in 1996), shopping opportunities are undeveloped, food service is absent, informational signs are lacking, etc.

This is potentially a three-hour cultural experience, covering prehistory to recent times, which can generate considerable admission fee revenues. The site offers spectacular views of the city and the Roman Theater/Odeon/Nymphaeum below. The addition of tourist facilities, including a revenue-generating cafe and museum gift shop, will offer the visitor a pleasant place to rest after a site tour and museum visit.

Madaba

Madaba is potentially a first-rate high-traffic attraction. The mosaics of St. George and the excavations in the proposed Archaeological Park would probably hold the interest of most visitors for close to two hours. With the addition of a trip to the Church of the Apostles and perhaps the museum, the average visit might be extended to three or four hours. This makes it essential, from a marketing standpoint, that (1) food and beverage service be available near the center of tourism activity and (2) portions of the town adjacent to the archaeological park be conceptually considered part of the tourism experience. Both the Archaeological Park and Church of the Apostles should be suitably configured to charge admission fees.

A broader concept of the Madaba tourism experience would provide diversions for visitors who desire variety in their tourism experiences, enabling them to experience contemporary culture as well as the featured ancient mosaics. Such a concept provides opportunities for generating additional revenues for the nearby souq, a private sector cafe concessionaire at the site, and perhaps other restaurants.

Salt

Salt is close to Amman (30km) and, if promoted, could enjoy high traffic from visitors interested in a village life cultural experience and something a little more "Arab" than most of Jordan's other cultural tourism attractions. The exciting topography of the village, its fine examples of Ottoman architecture, its 16th-17th century narrow streets, and active street life offer the visitor a storybook glimpse of the Middle East. Salt is probably the most photogenic town in Jordan. Plans for streetscape improvements along some of the town's oldest streets should be encouraged. Salt is a half-day site, at present offering a relaxed people-oriented experience that includes taking pictures, shopping, and eating.

SECTION III

PLANNING ASSUMPTIONS

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SECTION III
PLANNING ASSUMPTIONS

The following assumptions are intended to describe the expected business environment in Jordan and the Middle East region during the project. These assumptions are the underpinning of recommended strategies. Consequently, the success of the project, in terms of meeting foreign exchange earnings goals, is highly dependent on the accuracy of these assumptions.

- Economies in key European generating markets will continue to recover and sustain modest economic growth during the project.
- No significant slowdowns/downturns will occur in the U.S. economy during the project.
- Advancement of the peace process will lead to opening the border to the West sometime during the project—more likely toward the middle than the beginning—with or without a return of the occupied territories.
- At least one event in the region, beyond Jordan's borders, will significantly and negatively impact visitor flow patterns into Jordan during the project.
- A number of events in the region during the project will distort tourism patterns within the region and present short-term tourism opportunities for Jordan.
- There will be no significant tourism-disrupting events within Jordan during the project.
- Royal Jordanian will be privatized sometime during the project, with the possible involvement of a major international airline as a minority partner.
- The Government of Jordan will become more conservative, rather than more liberal, in its views on "acceptable" tourism during the course of the project.
- The Government of Jordan will incrementally increase its financial contribution to the tourism sector over time, but there will be no dramatic jumps in government economic contributions to international promotion efforts during the next three to four years.

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SECTION IV

TARGET MARKETS

SECTION IV
TARGET MARKETS

A. Market Potential Assessment

A1. Awareness Levels in Potential Markets

Awareness of Jordan as a tourism destination is highest in Finland among all non-Arab generating markets (excluding Turkey and Iran). The analysis below of MOTA arrival statistics (adjusted to consider only "tourists" as defined by the project) for 1989 and 1992 use market penetration factors as a surrogate for level of awareness in each market. Since the full impact of the 1990 and 1991 disruption in the region created distortions in visitor trends, 1990 and 1991 arrivals were excluded from this assessment. Using Finland (where market penetration has been highest) as the yardstick for judging the relative awareness levels of other markets, the table ranks Jordan's largest generating markets outside of the region. The table assigns Finland an arbitrary benchmark rating of 100 percent, against which other markets are measured. For example, the table indicates that market penetration in Austria has been 50 percent of the level in Finland, or, as we use the data here, awareness of Jordan as a destination in Austria is only half what it is in Finland.

Generating Markets Ranked by Level of Market Penetration

Generating Market	1992 Tourist Arrivals #	1989 Tourist Arrivals #	Relative Awareness of Jordan %
1. Finland	2,420	8,650	100
2. Austria	1,660	4,690	50
3. New Zealand	660	970	36
4. Italy	15,860	11,630	34
5. Switzerland	1,140	1,320	29
6. Sweden	1,280	1,360	27
7. United Kingdom	5,840	5,460	20
8. Germany	8,110	10,010	19
9. Australia	1,210	1,230	17
10. France	4,950	6,850	17
11. Spain	4,960	3,030	16
12. Singapore	130	80	13
13. Hong Kong	320	450	12
14. Belgium	460	460	11
15. Denmark	250	280	11
16. Netherlands	690	900	11
17. Canada	1,520	1,350	10
18. Greece	500	560	10
19. United States	8,570	11,140	8
20. Japan	1,490	1,580	2

Estimates based on MOTA data

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A2. Size of Potential Markets

Since a key goal of the project is to generate foreign exchange earnings in the near term, any analysis of potential markets must necessarily be biased toward markets currently generating the most tourists to Jordan. The table below ranks the target group of markets based on the estimated number of tourist arrivals in 1992.

Generating Markets Ranked by the Number of 1992 Tourist Arrivals

Generating Market		1992 Tourist Arrivals #
1.	Italy	15,860
2.	United States	8,570
3.	Germany	8,110
4.	United Kingdom	5,840
5.	Spain	4,960
6.	France	4,950
7.	Finland	2,420
8.	Austria	1,660
9.	Canada	1,520
10.	Japan	1,490
11.	Sweden	1,280
12.	Australia	1,210
13.	Switzerland	1,140
14.	Netherlands	690
15.	New Zealand	660
16.	Greece	500
17.	Belgium	460
18.	Hong Kong	320
18.	Denmark	250
20.	Singapore	130

Estimates based on MOTA data

A.3. Visitor Growth Trends in Potential Markets

Growth in tourist arrivals since the peak year 1989 (or how close those levels came to the 1989 peak year in 1992) indicates Jordan's relative momentum in generating markets. The table below ranks the target group of markets on greatest gains, or the least loss, in tourist arrivals since 1989.

Generating Markets Ranked by Growth in Visitation 1989-1992

Generating Market	1992 Tourist Arrivals #	1989 Tourist Arrivals #	Growth in Tourist Arrivals (1989-1992) %
1. Spain	4,960	3,030	+64
2. Singapore	130	80	+54
3. Italy	15,860	11,630	+36
4. Canada	1,520	1,350	+13
5. United Kingdom	5,840	5,460	+ 7
6. Belgium	460	460	+ 1
7. Australia	1,210	1,230	- 1
8. Japan	1,490	1,520	- 2
9. Sweden	1,280	1,360	- 6
10. Greece	500	560	-10
11. Denmark	250	280	-11
12. Switzerland	1,140	1,320	-13
13. Germany	8,110	10,010	-19
14. United States	8,570	11,140	-23
15. Netherlands	690	900	-24
16. France	4,950	6,850	-28
17. Hong Kong	320	450	-29
18. New Zealand	660	970	-32
19. Austria	1,660	4,690	-65
20. Finland	2,420	8,650	-72

Estimates based on MOTA data

Note: Sample size in the case of Singapore is considered too small to be reliable for the purposes used here.

B. Primary Target Markets

Italy, Germany, United Kingdom, and France should be the primary focus of the USAID funded portion of Jordan's marketing program. To mount a private sector-style promotional effort in any one of these markets would require a minimum investment of $1 million/year for advertising, plus an additional $250,000/year in sales promotion and public relations to produce measurable results. The proposed marketing strategy presented in Section V of this document is a highly targeted, trade-only package of programs that will produce results because of its very tight focus.

Jordan's largest generating market is currently Italy, with 15,860 tourist arrivals in 1992 according to MOTA data, followed by the United States with 8,568 tourist arrivals. Italy also ranks first in terms of market penetration (awareness). If one multiplies the market penetration factor by the number of tourist arrivals in 1992, a rough estimate is derived of the relative ease with which additional gains in arrivals might be achieved. That is, the marketing cost per new visitor is lowest when penetration x current arrivals is highest. This relatively crude methodology is relatively reliable. A more thorough analysis would, of course, take into account such things as relative currency strengths, cost of specific marketing strategies to be used, non-quantifiable factors such as structure of the generating market's travel distribution system, air transportation service considerations, etc. Experience has shown that more detailed analyses rarely change the relative ranking of generating markets, but only measure more precisely the relative difference between them.

Italy

Italy is clearly Jordan's top market in terms of near-term potential for the following reasons:

- Italy is currently Jordan's largest European generating market.

- Jordan has achieved greater market penetration in Italy than in any of the other large European markets.

- Italy's national airline provides service to Jordan and can be expected to independently promote travel to Jordan. The airline is likely to be a willing partner in cooperative promotions that encourage traffic on their route.

- Italian tourism arrivals in Jordan have grown substantially (+36.3 percent) since Jordan's peak tourism year, 1989. Only Spain has recorded a greater percentage growth since 1989.

- Italians spend more per person on international travel than residents of other large European generating markets—$835/person, compared to the United Kingdom ($505), Germany ($492), France ($381), and Spain ($194). Americans spend more ($887), but much goes toward higher air fare.

- Italian expenditures on international travel have risen about 375 percent over the past five years, compared to Spain (181 percent), United Kingdom (114 percent), France (91 percent), and Germany (66 percent).

Germany

Germany is a strong potential market for Jordan, producing nearly as many tourist arrivals in 1992 (8,110) as the United States (8,570). While growth in tourist arrivals from Germany since 1989 has not kept pace with either Italy or the United Kingdom, Germany has a relatively high penetration factor, particularly considering that the 20 million or so citizens absorbed from East Germany tend to distort its potential downward.

- Germany is currently Jordan's second largest European generating market.

- Jordan has achieved greater market penetration in Germany than in any of the other large European markets except Italy.

- German tourist arrivals in Jordan have declined since 1989 by about 2,000. However, Germany's relatively slow recovery has probably been due more to its national air carrier pulling out of the Jordan market (taking some tour operators with it) than to lack of interest in visiting Jordan on the part of German travelers. However, the German market has recovered more quickly than the French market.

United Kingdom

The United Kingdom is currently generating about 7 percent more Jordan tourist arrivals than in 1989, one of only six countries in the target group of 20 countries to surpass 1989 levels.

- The United Kingdom is currently Jordan's third largest European generating market behind Italy and Germany.

- Jordan has achieved greater market penetration in the United Kingdom than most European markets, including Germany, France, and Spain.

- British tourism arrivals in Jordan have grown 7 percent since 1989, Jordan's peak tourism year, one of the few countries that showed positive increases since that year.

- British international travelers spend about $500/person/trip, ranking behind only Italy in spending among Europeans.

- Expenditures by British residents on international travel have risen about 114 percent over the past five years.

France

Measured in terms of tourist arrivals in Jordan in 1992, France is among the five largest generating markets in Europe. While it has been slow to return to its 1989 peak levels of visitors to Jordan, it has much to recommend it as a primary target market.

- France is currently Jordan's sixth largest European generating market behind Italy, United States, Germany, the United Kingdom, and Spain. The United States is classified as a secondary market, as it will require a different marketing approach because of its size. Spain is also classified as a secondary market because of its residents' low spending habits.

- Jordan has achieved reasonable market penetration in France and has relatively large numbers of arrivals compared to other markets in the target groups.

- While the French are not known as big spenders, they do spend about twice as much per person on international travel as the Spanish.

- French tourist expenditures on international travel have risen about 91 percent over the past five years—more than expenditures by German tourists, but not as much as tourists from other large European generating markets.

C. Secondary Target Markets

Some markets are defined as primary target markets and others as secondary target markets for two reasons. First, JTB is not expected, in the near term, to have enough funds (from the project and member contributions) or professional staff to conduct effective promotion in more than four markets. Second, other than Spain, generating markets in the secondary target group require promotional strategies different from those appropriate to primary target markets. All secondary markets have good potential, but are treated slightly differently in the marketing strategies to take limited resources and professional staff into account. The grouping of markets also recognizes that a tight focus is required on relatively few markets so that marketing efforts produce measurable results.

Finland, Sweden, and Austria are all excellent markets. Their greatest potential is the generation of off-season and shoulder-season traffic. Spain, as mentioned above, is a primary target market in most respects, but is less upscale than the four selected primary markets and therefore lacks their potential for foreign exchange earnings. The United States is surpassed only by Italy in terms of the number of tourism arrivals generated in 1992. However, it is far too large and expensive to exploit with the same marketing strategies used in other markets. To mount a private sector-style national promotional effort in the United States would require a minimum investment of $10 million/year for advertising, plus an additional $750,000/year in sales promotion and public relations to produce measurable results.

While Jordan has had success with the U.S. market in the past, it has largely been only in the special-interest Holy Land segment of the market. The new cultural tourism market focus needs to be built on a new set of tour wholesalers.

The United States needs a highly focused effort aimed at a few key tour operators, not a broad assault on the market. All of these key U.S. outbound operators are members of the United States Tour Operators Association, headquartered in New York. Their membership directory can be purchased for a nominal charge, and operators can be targeted and contacted at European trade shows that are part of the recommended marketing strategies.

Special market conditions also apply in Canada's case. While the Canadian population base is only about 1/10th that of the United States, Canada is geographically much larger. The Canadian market can, in part, be approached in a fashion similar to that recommended for the United States. However, the general strategies outlined for secondary target markets should still be pursued for both the U.S. and Canadian markets.

Switzerland and Australia are both relatively promising markets for Jordan. Market penetration has been relatively good, but the number of tourist arrivals has been much smaller than for some of the larger markets discussed above. Persistent implementation of recommended secondary target market strategies will produce inquiries and opportunities to host interested tour packagers.

D. Markets of Opportunity

Markets of opportunity are markets within the target group that were not included in primary or secondary target markets for a number of reasons—very different reasons in many cases. Japan, for example, is a large market with considerable potential. It is also probably the most expensive market in the world to penetrate on a per sale basis. To mount a private sector-style promotional effort in any one of these markets would require a minimum investment of $4 million/year for advertising, plus an additional $500,000/year in sales promotion and public relations to produce significant results.

The Japanese market should be approached much like the U.S. market by targeting narrowly defined selected tour packagers. However, Jordan's market penetration in Japan is by far the lowest of any market in the target group. A considerable length of time and energy will be required to build trust and get traffic from any new tour operators.

The remaining markets in this group (New Zealand, Netherlands, Greece, Belgium, Hong Kong, Denmark, and Singapore) produced fewer than 1,000 tourist arrivals in 1992. The low-level market share maintenance and lead generation strategies recommended in Section V are appropriate to these types of markets, as are opportunistic responses to inquiries.

E. Targeted Market Growth

The exhibit on the following page shows targeted growth in tourist arrivals for the year 2000 for countries in each market group.

Target Markets

	Primary Target Markets	1992 Tourist Arrivals	Targeted Tourist Growth	2000 Targeted Tourist Arrivals
1	Italy	15,857	x 125%	35,679
2	Germany	8,111	x 125%	18,250
3	United Kingdom	5,841	x 125%	13,141
4	France	4,950	x 125%	11,137
	Secondary Target Markets			
1	Finland	2,421	x 75%	4,237
2	Sweden	1,282	x 75%	2,244
3	Spain	4,962	x 75%	8,683
4	Austria	1,659	x 75%	2,903
5	United States	8,568	x 75%	14,994
6	Australia	1,211	x 75%	2,120
7	Canada	1,524	x 75%	2,666
8	Switzerland	1,140	x 75%	1,995
	Markets of Opportunity			
1	Japan	1,490	x 50%	2,235
2	Singapore	130	x 50%	196
3	New Zealand	658	x 50%	988
4	Belgium	463	x 50%	694
5	Denmark	252	x 50%	378
6	Netherlands	689	x 50%	1,033
7	Hong Kong	321	x 50%	482
8	Greece	504	x 50%	756
	Total	62,032		124,809

SECTION V

TOURISM PROMOTION ACTION PLAN

SECTION V
TOURISM PROMOTION ACTION PLAN

A. Product Packaging

A1. Conceptual Basis for Foreign Exchange Earning Strategies

Strategies developed to achieve the project's principal goal—increased foreign exchange earnings—are rooted in the belief that increasing the number of international arrivals to Jordan is essential. While increased marketing and promotion will raise the number of discretionary visitors, such efforts will not, on their own, create a sustainable tourism sector. Other project strategies are therefore designed to ensure the sustainability of gains achieved through marketing and promotion. Site development strategies have been designed to build a tourism sector that will continue to be a significant contributor to the Kingdom's foreign exchange earnings well into the next century. These site development and marketing and promotion strategies are key components of a complex tourism economic system. A successful tourism economic sector is highly dependent on intangibles that the "supply-and-demand" sectors do not rely on.

Tourism is a composite of six categories of related tangible elements. These include lodging (hotel rooms), transport (within country), attractions (cultural sites), food and beverage, gifts and souvenirs, and incidentals. These are the elements of the tourism system for which value is clearly received and most financial transactions take place (notwithstanding considerable prepayment for these tourism tangibles in the case of Jordan). Each of these spending categories (foreign exchange earnings opportunities) are examined below to identify tactics that might be employed to generate more revenue from each.

While this assessment attempts to deal directly with the parts of the system that offer opportunities for revenue generation, there is no intent to imply that any one or all of them collectively make up the most important elements of the tourism product. The Jordanian tourism product is made up of many visible assets, which, combined with a number of intangibles, create a memorable cultural "experience."

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Spending Category	Available Tactics to Increase Foreign Exchange
Lodging (approximately 23% of total in-country expenditures, excluding international transportation)	• Increase room rates at existing properties (within limits of price elasticity, if any). • Develop more upscale properties (average rate increase). • Increase occupancy rates by attracting more tourists in shoulder and off seasons. • Reduce seasonality through incentive pricing strategies to attract tourists to Jordan during non-peak seasons. • Extend length of stay through pricing incentives and increased tourist activities/ attractions. • Increase spending on marketing directly to tour packagers. • Increase promotional participation in JTB.
Gifts/Souvenirs (approximately 24% of total in-country expenditures, excluding international transportation)	• Increase prices of tourist goods currently offered within limits of price elasticity, if any). • Increase quality (and therefore prices) of goods offered. • Introduce more "uniquely Jordanian" goods into the mix offered for sale. • Increase volume of tourist goods sold by expanding variety offered (more local content in goods offered). • Improve distribution system for handicrafts/tourist goods made in Jordan. • Increase shopping opportunities by increasing number of sales locations (museums, sites, etc.). • Introduce more shopping opportunities into the mix of package tour stops (visits to souqs that offer tourist goods). • Improve merchandising techniques through training.
Food/Beverages (approximately 19% of total in-country expenditures, excluding transportation)	• Increase food and beverage prices. • Increase volume of tourists to Jordan. • Increase opportunities for tourists to buy beverages and snacks (more locations near tourist sites). • Increase quality and variety of food and beverages available at existing vending locations.
Transportation (approximately 16% of total in-country expenditures, excluding international transportation)	• In-country transportation only is included in this category, since national accounts treat transportation to and from place of residence as part of the transport sector of the economy and not the tourism sector. Since in-country transportation is indirectly driven by visitor counts, site development, and site promotion within the overall marketing effort, it is not viewed as an independent opportunity for increasing foreign exchange earnings.
Site Admission Fees, Entertainment Fees (approximately 9%)	• Increase cost of admission to existing tourist cultural sites (within limits of price elasticity, if any). • Increase volume of visitors to Jordan. • Introduce more cultural entertainment and/or spectator events into the product mix. • Add more tourist entertainment options to sites and/or more sites where such offerings are available (burro rides, camel rides, jeep safaris, etc.). • Add and promote more variety to mix of cultural attractions offered. • Improve in-country promotion of cultural sites and attractions. • Add value to existing attractions (justified cost increase). • Improve the story of sites to add value to guide services.

Spending Category	Available Tactics for Increased Foreign Exchange
Incidentals (approximately 9% of total in-country expenditures, excluding international transportation)	• Incidentals include purchases of personal items and services such as film, toothpaste, medicines, hair cutting or styling, tipping, shoe shine, etc. Since these items are, for the most part, part of the country's international general retailing system, they will not be treated as part of the project. This category is demand-driven and not particularly sensitive to marketing program intervention except for increase in numbers of visitors. Available marketing tactics can only move the location of economic impact, not increase it.

A2. Product Packaging Strategy Options

Fortunately, Jordan's many tourism resources lend themselves to a number of thematic groupings, such as Roman Cities of the Arab World (the Decapolis), Ancient Arab Civilization (Nabataean Heritage), Mosaic Art of the Eastern Roman Empire (Mosaics), Desert Castles, the Holy Land (after return of the occupied territories), etc. Grouping attractions by theme helps to develop a cohesive story of early cultures for educational purposes. Thematic presentation of antiquities makes perfect sense for study tours but less so for cultural tourism. It must be remembered that first and foremost, cultural tourists come to Jordan for a vacation. They want their tourism experience to include cultural experiences and their sightseeing activities to focus on cultural attractions, but they are as much on holiday as any other tourist.

Organizing Jordan's tourism resources by theme is a highly useful tool for story telling and conceptualizing the product for marketing purposes. To deliver tourism experiences conceptually connected by themes, logical tour loops and/or routes are required. Unfortunately, only the Desert Castles lend themselves well to tour loop presentation. Arguably, the Decapolis can be organized as a logical touring loop (with an overnight stay along the way). However, one would have to pass by other first-rate attractions not related to the Roman theme to preserve the tour loop focus. This requires visitors whose curiosity is not limited to special interests to backtrack over much the same route to experience other attractions unrelated to the presented theme.

The current Jordanian road network mitigates against logical tour loops for the presentation of other themes. Unfortunately, from the standpoint of developing tour loops, the antiquities are where they are because they made sense to the civilizations that built them, and the roads are where they are to facilitate modern commerce. Over time, as Jordan continues to prosper, the road system in the rural areas (where many of the most interesting tourism resources are located) will be expanded to facilitate commerce and tourism. Generating foreign exchange earnings from cultural tourism in the near term will have to rely on existing infrastructure resources.

A3. Tourism Hubs, Satellites, and Spokes

An organizing framework built on tourism focal points (hubs), satellites (mini-hubs), and spokes (short trips or loops that emanate from hubs and mini-hubs) appears to be the best available framework. Hubs can best be visualized as key locations that act as temporary homes for tourists (where they sleep), while mini-hubs or satellites are smaller centers of tourism activity where tourists may or may not stay overnight but are likely to have meals. Tourism activity clusters (hubs and satellites, hubs and spokes/loops, mini-hubs and spokes/loops, etc.) currently exist and operate under this concept at Amman and Aqaba. Amman acts as a hub from which tourists visit Amman sites, Jerash and vicinity, Madaba/Mt. Nebo, the Desert Castles and, in many cases, Petra. Aqaba acts as a hub from which tourists visit Ayla, Petra, Wadi Rum, Pharaoh's Island, etc.

Current hotel developments near Petra will soon make the Petra area a hub of considerable importance, displacing Aqaba as the South's most important hub and perhaps rivaling Amman. For marketing purposes, the project should consider Amman (tourism center for North Jordan) and Petra (tourism center for South Jordan) as the two focal points (hubs) of tourism in Jordan. Because of current national policy, it will be necessary for marketing strategies to deny Aqaba hub status (although it will continue to function as a hub, particularly during winter). Contingency marketing plans will need to consider the eventuality of Jerusalem (tourism center for West Jordan) becoming a hub of considerable importance, perhaps rivaling Amman as a port of entry for Jordanian tourists. Among mini-hubs, Jerash and Madaba will likely become key hub satellite centers of tourism activity. Should the Jerusalem scenario develop during the project, Irbid may rival Jerash as an important mini-hub.

A3a. The Amman Tourism Hub and the Jerash Madaba Tourism Satellite Centers

Amman, much as it is now, should be the North Jordan tourism center. It would provide a home base from which cultural tourists would visit the city's attractions, make loops (or dead-end trips) to the tourism satellite centers of Jerash and Madaba, and loops or point-to-point trips to Salt, Umm al-Jimal, the Desert Castles, Wadi Seer, the Jordan Valley, the Dead Sea, etc. From Jerash, after an overnight, visitors would have the option of continuing north to view the Decapolis sites, enjoying the spectacular vistas of the Wadis along the way, or making shorter trips to Ajlun, Irbid, or one or more Decapolis sites.

The longer route north from Jerash (or from Amman, including Jerash) will require an overnight stay at Irbid. A preferred option, staying at Umm Qais, will require construction of a hotel at or near the site. The many assets of this site (excellent standing antiquities, a museum, a gift shop, the most attractive rest house in Jordan, scenic beauty, tranquility, a view of Lake Tiberias (Sea of Galilee), the Jordan Valley, and the Syrian and Israeli borders (of contemporary interest), make this site exceptional. The new hotel at Umm Qais needs to be about 80 rooms or expandable to that size. Any less would be taken over by Jordanians, leaving too few rooms to accommodate the 25 to 45 visitors coming on a single tour bus, especially when tours begin to originate in Jerusalem and other parts of the West Bank.

The Madaba tourism satellite center will be an Amman-Madaba-Amman half-day trip. Or it will be a mini-hub for longer stays in Madaba and for visiting Mt. Nebo, Ayn Mousa, Muhayyat, Muqawwir, Umm al-Walid, and Wadi Mujib, Al-Qasr, and Karak.

A3b. The Petra Tourism Hub

As more hotel rooms become available, Petra will become an important tourism hub. With adequate lodging capacity, Petra will begin to attract tourists out of Amman and Aqaba. While this may initially cause modest reductions in occupancy rates in both Amman and Aqaba, such reductions will be small, if at all perceptible, and should result in marginally longer lengths of stay.

Using Petra as a hub, cultural tourists will make loops or point-to-point trips to such sites as Wadi Rum, Shobak, and Ayla, and other sites in and on the way to the Aqaba area, including the Red Sea. Trips from Petra for a day at the beach will likely become a successful offering to visitors staying at Petra area hotels. The reach of loops and point-to-point trips out of the Petra hub is likely to extend to Karak and the Dead Sea as hotel operators attempt to extend the stay of their guests.

The hotel business in Petra is likely to be rocky in the near term. The development underway and planned is a bit ahead of demand, and only investors with deep pockets are likely to remain for the long haul (a traditional problem in the lodging sector in much of the world). The level of activity in the lodging sector suggests that several developers are betting on a successful peace process that will send demand soaring. When borders are fully opened between Jordan and Israel, more hotel capacity than is currently in the pipeline will likely be needed. International visitors staying in Eilat alone (with more international class hotel rooms than Amman) could double visitation to Petra and put pressure on hotel capacity near the site.

The timing and development dynamics at Petra are unclear at this time. However, there is no doubt that Petra will become the major tourism hub of South Jordan in the relatively near future, even if there are a few stumbles along the way.

B. Preconditions to Promotion

B1. Proposed Division of Responsibilities Between JTB and MOTA

The tourism promotion action plan is dependent on developing certain clear distinctions between activities that are to be the responsibility of JTB and those that are to be the responsibility of MOTA, either temporarily or permanently. Some tourism sector activities have been assigned to MOTA by law, which may take time to change for JTB to assume broader responsibility for the tourism sector. Achieving such legal changes would, of course, delay the start of the project. Other promotion activities need the aura of "official government" sanction in the international marketplace, for example, trade show sponsorship or co-sponsorship. In other cases it is simply more convenient for project implementation to have MOTA retain responsibility in the near term. For example, obtaining appropriate visitor data from the Public Security Directorate may be easier for MOTA than for the quasi-public JTB.

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For market planning purposes, MOTA's responsibilities and those of JTB can conceptually be dealt with best as "internal" (production) and "external" (marketing). That is, JTB should be responsible for getting tourists to Jordanian ports of entry and MOTA should take over from there.

MOTA should initially handle responsibilities that relate to tourism sector activities within Jordan, including:

- National tourism policy direction (guidance to JTB on GOJ policy)
- Product development (site and infrastructure development not specifically assigned to DOA by law)
- Product presentation (interpretive signs and guides)
- Product maintenance (site operations and protection)
- Tourist information dissemination (literature, guide books, and visitor centers)
- Visitor safety, security, and health
- Regulation of tourism enterprises
- Tourism sector training (vocational and hospitality)
- Market research and database maintenance (in part coordinated with JTB)
- Official GOJ representative to selected travel trade shows

JTB should handle responsibilities that relate to tourism promotion in generating markets, including:

- International marketing policy direction (policy guidance to JTB marketing coordinator)
- Approval of JTB marketing coordinator provided by the project
- Review and comment on annual JTB operating budget prepared by the JTB marketing coordinator for approval by the project
- Approval of annual detailed market plan and proposed budget (project and JTB funds) prepared by the JTB marketing coordinator
- Guidance to MOTA on product development and presentation needs (based on market feedback)
- Development of marketing and promotional print materials
- Travel trade advertising and promotion
- Hosting travel trade "fam" trips
- Representing Jordan at selected travel trade shows

B2. JTB Secretariat Staffing and Operations

B2a. JTB Marketing Coordinator

The JTB Secretariat should initially be headed by an experienced international marketing professional from overseas hired for the life of the project. This marketing coordinator could be replaced by a Jordanian professional late in the project after the proposed marketing strategies and in-country representation arrangements have been market-tested and refined, and after the marketing program evaluation research planned for year four of the project is completed and presented to the JTB.

Position Description for Marketing Coordinator of JTB

Reports to: JTB Executive Committee (approximately 5 members)

Primary Responsibilities

- Carry out marketing policy direction provided by the JTB
- Hire all JTB professional and support staff as identified and approved by the project
- Direct the day-to-day activities of all JTB staff
- Prepare (annually) a proposed JTB operating budget for review and comment (or approval) by the JTB Executive Committee and approval by the project
- Prepare (annually) a detailed marketing plan and proposed budget (project and JTB funds) for approval by the JTB)
- Execute all JTB contracts for professional services, marketing services, printing, media purchases, operating materials, and supplies, etc.
- Direct all contractor activities
- Schedule, convene, and facilitate meetings of the JTB and the JTB Executive Committee

Qualifications

- Minimum of 10 years of experience in international tourism marketing
- Minimum of five years of experience in working with the travel trade in two or more European tourism generating markets, preferably in the private sector or in cooperation with the private sector
- Minimum of five years of experience in managing professional and support staff, preferably multinational staff personnel
- Directly relevant experience in developing international marketing plans and budgets (required)
- Experience in developing and executing vendor contracts (highly desirable)
- Previous experience in working for/with private sector volunteer organizations or consortium (highly desirable)
- University degree with specialization in marketing, business, or related area (required), with special consideration given to candidates with advanced degrees
- Fluency in Arabic (desirable but not required)

Other Conditions

- Required residency in Jordan for the duration of employment agreement

B2b. Earned Media Professional

The marketing coordinator would be assisted, during the formative first two years of the project, by an "earned" media (as opposed to paid advertising) professional from overseas. This professional would be responsible for developing Jordan's network for implementing indirect sales and other marketing strategies by identifying trade media contacts and selected general media contacts in each generating market. He/she would establish procedures for implementing earned and market communications strategies, direct and refine initial earned media and market communications strategies, direct the development of the first JTB video in the series of videos contemplated, and train the Secretariat's permanent Jordanian professional staff.

B2c. Market Communications Director

The market communications director would be a Jordanian professional working under the direction of the marketing coordinator, with day-to-day direction from the earned media professional for the initial two years of the project. This professional would be responsible for directing and implementing earned media and travel trade communications strategies defined by the annual JTB marketing plan. This individual should be considered to be on a career track for the position of marketing coordinator or assistant marketing coordinator (when the JTB Secretariat expands in the future), and hired for the life of the project.

B2d. Direct Sales Professional

The direct sales professional would be a Jordanian professional working under the direction of the marketing coordinator, with day-to-day direction from the earned media professional for the initial two years of the project. This professional would be responsible for directing and implementing direct sales and related strategies (i.e., sales missions, trade media advertising, trade shows, etc.) defined by the annual JTB marketing plan. This individual should be considered to be on a career track for the position of marketing coordinator or assistant marketing coordinator (when the size of the JTB Secretariat expands), and hired for the life of the project.

B2e. Meetings Coordinator

The meetings coordinator would be a short-term advisor/trainer to the Secretariat staff during the initial two years of the project (two assignments per year of approximately three weeks duration). This individual would be responsible for assisting the staff in developing and refining procedures for JTB sponsored meetings, seminars, the annual Royal Conference on Cultural Tourism, JTB and MOTA participation in European travel trade shows, trade show hosting events, etc., as defined by the annual JTB marketing plan.

B2f. Administrative Assistant

The administrative assistant would be a Jordanian professional working under the direction of the marketing coordinator, with day-to-day responsibility for financial record

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keeping, schedule coordination, staff travel planning, and other administrative duties assigned by the marketing coordinator. This is a professional, not a secretarial, position. The lean structure of the Secretariat (modeled on modern private sector staffing concepts) may require the administrative assistant, as well as all other staff, to conduct some functions that would have been considered "support staff" responsibilities in the past. This person should be hired for the life of the project.

B2g. Contingency TDY

The project anticipates the need for occasional technical support from outside experts, particularly during the initial two years, while new industry working arrangements are being tested and new marketing strategies are being implemented and refined. The contingency TDY assistance can be viewed as a resource available to the marketing coordinator for trouble shooting as the marketing effort moves forward. It is contemplated that up to two three-week assignments would be required during the first two years of the project.

B2h. In-Market Representation

The project contemplates having a resident marketing representative in each of its four primary target markets. However, a full-time representative in each generating market is not needed, nor are funds likely to be available in the near term for such full-time representation. The amount of traffic generated by these markets at present does not justify full-time representation. Full-time in-market representation will be needed in a given generating market when that market starts to generate over 100,000 tourist arrivals/year. In-market representation should be provided by a professional marketing representative that currently represents other, non-competing destination markets in the generating market where the representative resides. The services to be provided by the representative, the approximate time to be provided for handling JTB-related activities, and the cost/year for such services should be negotiated by the JTB marketing coordinator. Contracts for in-market representation should be year-to-year, not multi-year. The services to be provided might include:

- Making direct sales calls (alone or with JTB private sector members) to tour wholesalers identified by Secretariat staff (targets for new account sales are specified in the marketing strategies outlined in Section C. below, about two/year, but will depend on JTB's annual marketing plan)

- Identifying new business opportunities for JTB member tour operator, hotel, and other companies, and communicating this and other market intelligence to the JTB Secretariat

- Coordinating in-country marketing activities with Royal Jordanian and other promotional partners supplying tourists to Jordan

- Facilitating trade and media communications efforts initiated by the Secretariat and advising the Secretariat on ways to improve marketing and communications strategies

- Advising the Secretariat on appropriate trade media vehicles for the JTB's paid media strategy and facilitating media buys

- Advising on opportunities for sales missions and assisting in scheduling and facilitating such missions to the generating market

- Assisting in trade shows, when appropriate, by arranging appointments between tour wholesalers and the JTB trade show delegation, providing market intelligence, joining the JTB delegation, etc.

- Conducting, speaking at, and/or assisting in JTB in-market travel agent/tour operator seminars and JTB member seminars in Jordan, including the proposed annual Royal Conference on Cultural Tourism

- Other assistance to the JTB Secretariat, from time to time, as requested by the marketing coordinator

Multinational public relations firms in Europe and multi-client travel industry representational firms and individuals are likely to offer in-country representation of the kind needed by the JTB. Candidate firms can probably best be identified by USAID/Jordan by directly contacting (through appropriate U.S. Embassies) the United States Travel and Tourism Administration (Commerce Department) in-country offices in Milan, Frankfurt, London, and Paris. These offices have good travel industry contacts in their respective generating markets and should be able to help start the recruiting process for JTB representation.

Preliminary estimates for operationalizing JTB are included in Annex D. Please note these estimates are representative and illustrative and are not meant to be definitive.

C. Tourism Promotion Strategies

C1. Theme Development

The three themes developed by the project need to be carried to the next step. While the themes adequately define tourism product groupings, none will work well for promotional purposes. For example, "Nabataen Heritage" has little if any meaning in European, American, or Far East generating markets. The current themes need to be popularized for sales promotion purposes; individual marketing concepts and sell lines will need to be developed for each theme, each with a short compelling "story" describing the historical/cultural aspects of the sites that will motivate travelers to visit Jordan.

A key element of theme development will be testing theme options, sell lines and marketing concepts in each of the primary target markets. International marketing lore is rich with tales of untested themes gone bad in the marketplace, including the United States tourism promotion theme "America: Catch the Spirit," which translates into "America - Catch the Ghost" in languages lacking a directly comparable word for spirit. It is therefore essential that market testing be done prior to full commitment to initial concepts.

Theme development and market testing should be done in year one of the project. An American multinational advertising/marketing firm would be the most appropriate contractor to develop "popular" versions of the themes identified by the project. These firms have the in-house creative marketing skills to develop the needed concepts and stories and access to the required market research resources in each of the target markets.

Before market research is conducted in Europe, however, it will be necessary to review each of the themes and sell lines with the arbiters of cultural values in each area of Jordan where the themed resources are located. While marketing and promotion that work should be the ultimate aim of the project, it would be unacceptable to consider any marketing approach that would be culturally offensive.

C2. Route Testing

The project's proposed touring routes should be tested for marketability before print materials are developed. Tour packagers will have the needed marketing sensitivity to evaluate how much time should be allocated to each site, where and how each theme's story should be related to tourists, which nearby sites have potential for optional side trips, etc. Therefore, route testing familiarization trips (fam trips) need to be scheduled to test the marketability of each proposed route. While the JTB and MOTA can arrange and host fam trips, a contractor should be engaged to conduct focus group research at the conclusion of each.

Separate fam trips should be conducted for each primary target market to identify individual route refinements needed to make the selected themed routes saleable to each market's travelers. JTB staff should monitor the focus group sessions so that they can conduct similar assessments for secondary target markets as opportunities arise or additional promotional funds become available.

C3. Marketing and Sales Support Materials Development

Before new marketing initiatives begin in earnest, some basic sales materials will need to be developed to support a sustainable professional marketing effort. Among the most important sales tools to be developed is a Tour Planning Guide aimed at providing tour packagers and tour operators with all the information they need to organize theme-related tours to Jordan for the package-tour market. The package-tour market is reported to be about 85 percent of the holiday visitors from the target market group. The proposed Tour Planning Guide is also an important trip planning tool for selected travel agents in key

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markets. The travel agents serve the FIT (Free Independent Traveler) market (about 16 percent of holiday travelers from the target market group).

The second important sales support tool should be a series of rack brochures (single sheets folded to approximately 4" x 8 1/4") promoting the project themes and suggested routes. It would be preferable to print each of these brochures in Italian, English, German, and French. These brochures are intended to support sales in two ways. First, they will be used in generating markets by selected travel agents to sell independent travelers package tours available from tour wholesalers. Second, they will be used to sell extended stays to independent travelers through distribution at hotels, visitor centers, and museums within the Kingdom. The proposed quantities for these brochures anticipate that reprints will be required during the course of the project; reprints would be the responsibility of JTB. This supports the project's aim of transferring sustained tourism promotion responsibility to the tourism private sector.

This strategy requires most of the allocated project funds to be spent in year one. It will be necessary to develop and produce the Tour Planning Guide and develop and print the initial run of theme/route brochures as soon as possible in year one so that ongoing Jordanian marketing efforts can switch to the cultural tourism market positioning strategy.

Significant front end costs and reprint costs are incurred to get new tours into the mix of tour wholesaler/tour packager catalogs. It is a general practice in the industry for the beneficiaries of new tour offerings to share the cost of introducing the new tour product. In the case of Jordan, it will be necessary to contribute a share of these costs in exchange for the tour wholesaler providing access to a new distribution system.

C4. Image and Awareness Building

While the selected primary target markets were, in part, selected on the basis of awareness (i.e., market penetration = awareness), the new marketing strategy focuses on developing Jordan's image as a cultural destination. This requires some nurturing of target markets to fully develop the chosen image. It is important to remember that all communications and contacts with the travel trade and visitors to Jordan will be part of the image and awareness building strategy. Consistency in all aspects of tourism promotion, product presentation, visitor services, etc., will be key to developing a coherent image of Jordan as a cultural destination. However, certain direct and indirect tactics ("pull through" marketing techniques) will focus specifically on image development and awareness.

The tactics to be used to directly develop image and awareness include direct mail and scheduled and opportunistic press releases to travel trade and selected consumer print media in primary target markets, scheduled and opportunistic press releases to travel trade and selected consumer print media in secondary target markets, and travel trade communications (scheduled press releases) only in markets of opportunity.

The tactics to be used to indirectly develop image and awareness include: travel writer fam trips and direct communications with travel writers (story idea feeds) in primary

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target markets, and direct communications with travel writers in secondary target markets. All fam trips should be followed up with debriefings (focus groups) to constantly monitor travel trade assessments of the Jordan tourism product and how it can be improved.

This strategy should begin in year one of the project, decreasing in intensity through year five (i.e., 40 percent of available funds allocated to year one activities, 30 percent in year two, and 10 percent in each of the next three years).

C5. Market Disruption Strategy

Concurrent with new marketing initiatives, it will be necessary to begin taking steps to protect Jordan's current market share of key existing markets. Since regional political events have disrupted Jordan's tourism economy with such regularity in the past, it is clearly is essential to have a workable damage control strategy ready to implement whenever similar events occur in the future. Since JTB is proposed to be the implementing instrument of other strategies that involve ongoing communications with portions of the international travel trade and general media, this program element should be the responsibility of JTB as well.

An image damage control plan should be drawn up early in year one of the project. Key elements of the plan should include: up-to-date information distribution lists, initially for the target market group (names, addresses, telephone numbers, fax numbers, etc.) and an agreed upon implementation strategy, including preassigned responsibilities for implementation. Press releases to the international wire services (reporting, for example, reliable information on tourism safety and security in Jordan in the case of an outbreak of hostilities anywhere in the region) should be used.

C6. Earned Media Strategy

Using an earned media (akin to public relations) strategy has two things to recommend it. First and most important, consumer trust of earned media is considerably higher than paid advertising. Second, the cost of exposure (expenditures/potential consumer reached) is much lower than paid media. However, the key shortcoming of earned media strategies is that they require professional skills, sustained effort, and diligent follow-through to exploit their sales generating potential. Unfortunately, these success-assuring characteristics of sales promotion appear to be in short supply in Jordan at present. Technical assistance and training can probably overcome this problem in as little as two years.

This potentially high-impact, relatively low-cost strategy will rely on persistent opportunistic exploitation of events only incidentally related to tourism (visits to target markets by the King, new discoveries of antiquities, etc.) and a planned, scheduled, and managed press release program. A third element of this strategy, communications with travel writers, is covered under Section C4., the proposed Image and Awareness Building Strategy.

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While this strategy is conceived as a consistent, year after year planned effort, the unforeseen event(s) that occur in nearly every five-year marketing plan will necessarily alter the planned flow of earned media efforts. Unforeseen events in Jordan or the region, positive or negative, will temporarily focus world attention on Jordan. To preserve existing market share, these occurrences should be capitalized on as opportunities to sell the tourism assets of Jordan, or responded to with the proposed damage control strategy outlined above (see Section C5, Market Disruption Strategy). Receptivity to information about Jordan and the region peaks in generating markets when positive opportunity-creating events and negative market-disrupting events occur. Because such events will surely occur and knowing when they will occur is not possible, planning for them is essential.

Implementation of the planned portion of the strategy should begin in year one of the project and continue through year five and beyond. Since consumer advertising is not an appropriate use of project funds, and JTB will likely not have sufficient resources to mount an effective paid consumer advertising campaign in the foreseeable future, the earned media strategy is the de facto backbone of this proposed marketing action plan. Proposed allocation of funds belies this importance. Other strategies are closely related to the earned media strategy and in most cases are part of it.

In primary target markets, a significant portion of the in-market JTB representatives' time should be regular communications (personal as well as through other means) with the trade and selected consumer media. Videotaped communications (electronic press releases) should be developed and distributed to primary and secondary target markets when major tourism-related promotional opportunities are identified. The scheduled print media press release element of this strategy is aimed at markets of opportunity as well as primary and secondary target markets.

The final key element of this strategy is developing videotaped programs, initially on the proposed tourism routes and distributing them to primary target market television stations for public service television broadcasting (unpaid air time). Since this is an experimental tourism destination promotion ("soft sell") technique just beginning to be introduced into the marketing mix, it is prudent to test the concept prior to full-scale commitment.

The earned media strategy anticipates developing one 15-minute program for market testing in a single primary target market in year two. The test market should be identified in consultation with the proposed JTB market communications/earned media professional and the JTB in-market representatives (public relations contractor). If the test marketing exercise proves to have potential, additional sound tracks should be developed for the test market video and one additional 15-minute videotape should be produced each year for distribution. In addition, opportunities for in-hotel airing of the test market program (and subsequent programs if they are developed) should be explored with Jordanian hotels. This use would, of course, be aimed at extending the stay of independent travelers.

C7. Direct Sales

Travelers from Europe and America begin planning their trip about six months before departure, and Japanese travelers about 10-12 weeks before departure. Travel agents are used as sources of trip planning information by 50-60 percent of all international travelers, and tour operators are used by 12-15 percent of international travelers. Actual booking of international trips (FIT and package tours) are more in the range of 75-80 percent by travel agents, 3-10 percent directly by tour operators, and 5-20 percent by airlines, depending on the generating market.

Because of the key role of the travel trade in trip planning and booking, it is essential that the Jordan tourism product be "on the shelf" and available for sale to the potential visitor to Jordan. While visibility and availability does not assure sales, the absence of information on Jordan's tourism assets virtually guarantees there will be no sales.

Key to this strategy is paid advertising in travel trade publications. In primary target markets, the advertising messages should be aimed at generating inquiries for more information on Jordan from travel agents and tour operators, to be followed up by JTB in-market representatives. In the case of secondary target markets, the aim should be to generate inquiries from travel agents and tour operators to be followed up by JTB in Jordan. While the paid media element of this strategy enhances Jordan's tourism image and promotes awareness, the real utility of this strategy (as a tourism traffic generator) depends on timely professional follow-up to inquiries.

Paid advertising in selected travel trade media should begin in year one. There are approximately 60-70 viable travel trade publications in the four primary target markets and 150-175 viable travel trade publications in the eight secondary target markets. The appropriate approach to this vast array of advertising opportunities is to select no more than two key publications in each of the four primary markets and, in the secondary markets, the United States, Canada, and Japan. In the remaining five secondary markets, one publication each will be sufficient. Generally speaking, the paid advertising portion of this strategy is estimated at about $200,000/year allocated approximately as follows: $25,000/year in each primary market, $20,000/year in the United States, $20,000/year in Japan, and $10,000/year in the six remaining secondary markets.

Advertising objectives will, and should, vary market by market. For example, Germany, Austria, Sweden, and Finland are good markets for promoting winter traffic (off-season at Petra). The United States and Canada are good markets for promoting summer travel (low-season at Petra). Season-sensitive advertising and pricing strategies will have to be worked out by JTB and the private sector. In addition to travel trade advertising, the direct sales strategy contemplates the use of sales missions to primary markets, fam trips for European travel trade intermediaries (tour operators and selected major travel agents), and two levels of participation in European travel trade shows.

Sales missions create opportunities for key Jordanian private sector "sellers" (primarily hotels and tour operators) to meet face to face with potential "buyers" (primarily tour operators and travel agents) and educate the buyers on the tourism product (cultural resources), the friendliness of the people ("lifestyle" aspects of the product), the quality and availability of tourism support facilities and service (hotels, food, entertainment, rest stops, guides, language constraints, infrastructure, etc.). This activity should be limited to primary markets, with long-haul transportation supported by Royal Jordanian, lodging costs covered by JTB representatives and the private sector, and travel within Europe and hosting expenses (travel agent seminars, etc.) supported by the project. Such missions should be limited to no more than one visit each year to each of the four primary markets. While fam trips are currently an important part of the Jordanian marketing effort and key to the Direct Sales strategy, they should not require the financial support of the project. However, all fam trips should be followed up with debriefings (focus groups) to constantly monitor travel trade assessments of the Jordan tourism product and how it can be improved.

Jordan has had some experience with European trade shows. However, limited resources and experience have prevented the Kingdom from establishing a presence at the shows. Given the largely external negative forces working against Jordan at these industry marketing and sales opportunity events, it will be necessary to use a rather heavy-handed approach to trade show participation in order to be noticed and taken seriously as a destination. This will involve three tactics: an oversized sales booth, a first-rate exhibit, and a larger than normal booth staff. The exhibit should be a very professional, attention grabbing display of the Kingdom's top cultural resources, the size of the floor space rented should be among the largest booths at the show (rather than the minimum size available) and booth staffing should be generous so that no possible sale gets away. The booth should, of course, be well stocked with promotional literature and "premiums" (posters, key chains, etc.) and other inducements to visit the booth (coffee and tea if feasible or some other means to demonstrate traditional Jordanian hospitality). Two shows per year in Europe should be the minimum (and the maximum): the ITB (Berlin) and the World Travel Mart (London).

In addition, Jordan should host an event at each show. Hosting a meal function is not recommended (too unfocused and too low a return on invested resources) but other hosting opportunities should be explored, such as small parties with Jordanian musicians or other entertainers (large hospitality suites or the like). The criteria for such hostings should be to invite no more potential buyers than the delegation can greet personally (over-inviting is, of course, necessary to compensate for no-shows). Jordanian hospitality is what is to be sold at these hostings (the exhibition hall floor is where the product is to be sold) and developing contacts and building networks is the intended payoff. Sales can often be consummated at these events but usually after a few years of show participation.

C8. Indirect Sales

The key element of the indirect sales strategy is visitor satisfaction. Surveys of international travelers indicate that about 70 percent are influenced in their destination selection by information provided by friends and relatives. Recent surveys of European long-haul travelers indicate that 40 to 50 percent use information from friends and relatives to help plan their trips. Travelers who have a positive experience when visiting Jordan become good potential salespeople for the Kingdom. Conversely, those who are not satisfied with their tourism experience in Jordan become a potential impediment to selling the Kingdom as a destination. Data is not currently available on how much repeat business Jordan receives, but knowledgeable Jordanians guess that it is not a strong segment of the market.

Site management and facilities improvements, dealt with in other sections of this report, are aimed at improving visitor satisfaction. While there isn't any documented evidence of visitor dissatisfaction, the proposed improvements are clearly the minimum needed to provide visitors with a positive cultural tourism experience.

C9. Strategy to Promote In-Country Understanding of the Economic Potential of Tourism

This strategy has multiple aims, including:

- Educating the banking community and private investors on the tourism sector's potential for growth
- Creating opportunities for national networking of tourism interests to facilitate better distribution of visitors to more cultural sites
- Providing professional development seminars (concurrent sessions) on international marketing of cultural tourism, enterprise development opportunities (particularly retailing international visitor information requirements, incentive pricing strategies, yield management, etc.)
- Educating local government and tribal leaders on the tourism sector's potential to positively impact local economies (without degrading local cultural values)
- Educating representatives of Jordanian cultural institutions and other entities on tourism's potential for supporting their aims and educating the tourism sector on the potential of the cultural sector for supporting tourism's aims
- Encouraging the national private sector tourism leaders to be sensitive to the concerns of local leaders
- Raising the visibility of tourism and its importance to the economy among the general population
- Educating non-tourism ministries and members of parliament on the tourism sector's potential to generate foreign exchange earnings

The proposed vehicle for achieving these aims is an annual national conference designed to bring together the tourism sector (public and private) with various representatives of other sectors of government and interest groups to discuss problems and opportunities in the tourism arena. In addition, the conference should be used as an opportunity to raise the

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level of professionalism in the industry by offering seminars on specific areas of interest to the industry.

The conference should start, in year one of the project, with regional meetings in various parts of the Kingdom to discuss issues, problems, and opportunities in the tourism sector. Seminars and training sessions could be part of this venue. The first national conference would follow the regional sessions in Amman. Subsequent national conferences might be rotated to other parts of the Kingdom to demonstrate central government's concern for regional tourism issues. A conference of this type would garner national attention and focus on tourism's importance to the economy.

C10. Market Monitoring and Evaluation

As with any marketing effort, the proposed initiative will have to be monitored and progress measured. Baseline survey data must be collected before marketing initiatives begin (year one). The baseline survey should be repeated in year four of the project, assuming no intervening events disrupt the market.

Preliminary and illustrative estimates for the above described inputs into the tourism promotion strategy are provided in Annex D.

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ANNEX A

SCOPE OF WORK

ARTICLE I - STATEMENT OF WORK

Background

The Hashemite Kingdom of Jordan is interested in increasing foreign exchange through promoting selective international tourism. In 1990, USAID reviewed the state of tourism and discovered weaknesses such as: the absence of a national strategy, lack of coordination between the private and public sectors, narrowly focused and poorly coordinated marketing, inadequate services across the sector and inadequate tourist infrastructure.

Since then, USAID has worked to address some of the weaknesses in the tourism sector. Although Jordan has not developed a sophisticated national strategy, there is strategic thinking occurring. For example the Ministry of Tourism and Antiquities (MOTA) has a goal that the present number of non-Arab tourists per year should be doubled from 130,000 to 260,000 by the year 2000. The Jordan tourism industry is also beginning to consider how it should respond to developments in the peace process which may effect the influx of tourists to the region. These decisions do not constitute a tourism strategy, however, but rather they indicate the beginning of strategic thinking about tourism.

Tourism statistics vital to long-term marketing are inadequate and remain a problem. Innovative ideas are needed to identify international marketing trends for the future. Currently, the MOTA and USAID are collaborating on a re-design of the airport exit card to identify the needs of international tourists and to improve the statistical data, which will aid in making marketing decisions.

Coordination between the public and private sector has improved significantly since 1990. The creation of the JTB is largely responsible for improved private and public sector collaboration. The JTB is the official marketing arm of the MOTA. It is comprised of key members of the private and public sector and, represents a partial privatization of an entity that hitherto had been an organized public and disorganized private function.
USAID has provided limited matching funds to the JTB. The JTB is the designated umbrella for all marketing activities under the project. The JTB was created to market Jordan as a destination. Membership is voluntary. Most of the key players in tourism are members and financial contributors to the consortium. The consortium governing body includes the MOTA, the hoteliers, the tour operators, the Royal Jordanian Airline, and Jordan Express Tourist Transport (JETT) Bus Co. Over the past ten years a number of marketing studies have defined the parameters of the international market, however, there has been little success in actual market segmentation and penetration. The Mission has identified tourist routes and themes that they

believe represent the future for international tourism in Jordan. These themes are yet to be tested in international markets. For Example, previous studies have indicated an increased interest by the Japanese market in historical tourism. The question for Jordan becomes how to convert that interest into increased international tourism for the Hashemite Kingdom.

A number of tour operators have been successful with different approaches to international marketing, from religious tours to incentive tours. They have specialized in selected markets for tourists with narrow interest,and developed their own internal packages to provide tourist value. There is strong competition among some of the key operators for a limited flow of upscale tourist at cut-rate prices, however, few are reaching out to non- traditional markets or developing new destinations.

1. Title

Project: Technical Feasibility Studies V Project

2. Objective

The contractor shall identify preliminary methods for test marketing touristic themes and implementation techniques for successful international marketing campaigns. The contractor will provide specific input for test samples.

3. Statement of Work

A. General Tasks

The contractor shall review the most recent tourism strategies and review previous studies on tourism in Jordan and familiarize himself/herself with the tourism environment. The contractor will meet with USAID/Jordan, JTB, GOJ, and private sector entrepreneurs involved in marketing tourism, assess the marketing needs of the JTB, design country specific sample surveys for international test markets, identify image concepts for marketing Jordan in Europe and design a strategy around the three selected themes.

B. Specific Tasks

1. The contractor shall work with the USAID resident Cultural Resources Specialist to classify Jordan's tourist attractions by type and evaluate their potential appeal to various market segments. Identify any operational weak points in the resources which marketing efforts may alleviate.

2. The contractor shall prepare an evaluation of principal international markets for Jordan by nationality and by

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market segment including estimated volume potential for the next five-years and principal market characteristics. The analysis will encompass three elements: (1) worldwide tourism trends, (2) historic visitor trends, (3) visitor characteristics for leading nationalities; and, (4) market segments, (5) regional tourism (multi country, itineraries).

3. The contractor shall prepare a competitive analysis of the current international tourism environment for Jordan. This analysis will identify principal competitive destinations for each resource type identified in "B" above and for each of the priority market segments identified in "C" above.

4. The contractor shall identify potential international test markets for selected Jordanian themes, The Nabataean Heritage, The Mosaic tradition of Jordan and The Roman/Byzantine Cities.

5. The contractor shall evaluate current promotional techniques and provide recommendations for improved service delivery.

6. The contractor shall provide input on current staffing of the JTB and identify anticipated training needs. Also, develop a job description for the JTB Executive Director and secondary staff positions.

7. The consultant will identify other specific staffing expertise that is needed to encourage increased international visitors.

4. Reports

1. It is anticipated that the project will require one person month to produce the following reports: The consultant shall prepare a resource analysis classifying Jordan's attraction by type and evaluate their potential appeal, prepare a market analysis identifying potential international markets for Jordan, prepare a competitive analysis identifying principal competitive destinations for each priority market segment, and prepare a draft scope of work for the Executive Director of the JTB.

2. The contractor shall present a detailed work plan for USAID review and approval within 3 days of commencing work under the contract. The contractor will also provide a formal debriefing to USAID one week prior to departure for the host-country to carry out the A.I.D.-approved activities.

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5. Minimum Experience Requirements

The contractor's principal personnel performing the required activities shall be a senior consultant with a minimum of 7 years experience in marketing international tourism for developing countries and international tour operators.

Personnel must be fluent in English, possess excellent writing skills and must be experienced in the following areas:

- analysis of tourism markets in Europe and North America
- strategic marketing for tourism from Europe and North American regions; and in the
- development, identification and penetration of new markets.

The contractor must have established contacts with upscale European and American Tour wholesalers and operators.

Other desirable qualifications would include experience in establishing a marketing image for a lesser-known destination and familiarity with regional tourism products and markets.

6. Period of Performance/LOE Requirements

The consultancy will require approximately twenty-eight person days of performance. The project activities anticipated start date is August 1, 1993 and the completion date is September 6, 1993. The consultant will work directly with the USAID Project Paper team members and other designated officials.

The contractor will work a six-day workweek to coincide with the Jordanian workweek, Saturday thru Thursday.

ARTICLE II - REPORTS

Contractor shall comply with basic contract's reporting requirements stated in Section C.3.(c) - Specific Delivery Order Reporting Requirements, and Section F.9.- Delivery Order Reporting. In addition, the Contractor shall prepare and deliver the required reports described in the Statement of Work.

ARTICLE III - TECHNICAL DIRECTIONS

A.I.D. Technical Direction during the performance of this Delivery Order will be provided by USAID/Amman, Alonzo Fulghham, Project Officer.

ARTICLE IV - TERM OF PERFORMANCE

A. The effective start-date of this Delivery Order is the date the Order is signed by the Contracting Officer (see Block 11b). The Contractor shall begin performance of services required under this Order on the Order's effective start-date (as defined herein) or, a subsequent date approved (in writing) by the Order's Project Officer.

B. The Order's estimated completion date is September 6, 1993. The Contractor shall deliver all deliverables (including final reports, if required) not later than the Order's completion date.

C. Any extension of the Delivery Order's completion date set forth above, other than a one-time extension of up to thirty (30) calandar days maximum, which may be authorized (in writing) by the cognizant Project Officer, shall be requested in advance for approval by the cognizant Contracting Officer. The Contracting Officer's approval of the request, if given, shall be in writing. A request for no-additional-cost Delivery Order completion date extension shall include a supportable justification. Justification shall contain a full explanation of circumstances causing/leading to a delay in the original delivery schedule. The requester must also describe what efforts, if any, were made to prevent such delay from occurring. Additionally, the request shall include a statement that funds currently obligated are sufficient to cover the Contractor's period of performance including the extension, if any is approved by the Contracting Officer.

The Contractor shall attach a copy of the Project Officer's approval for any extension of the term of this Delivery Order to the final voucher submitted for payment.

D. It is the Contractor's responsibility to ensure that the Project Officer-approved adjustments to the original estimated completion date do not result in costs incurred which exceed the ceiling price of this Delivery Order. Under no circumstances shall such adjustments authorize the Contractor to be paid any sum in excess of the Delivery Order amount.

ARTICLE V - WORK DAYS ORDERED

A. Functional Labor Category and Specialist's Name	No. Days Ordered	Fixed Daily Rate	Amount
Sr. Trade & Invest. Prom. Spec. (T. Lloyd)	28	$710.00	$19,880

B. The individual identified above is designated as key personnel and the Contractor is not authorized to substitute the consultant without the Project Officer's prior written approval and the cognizant Contracting Officer's prior written approval of proposed substitute(s) daily rates.

ARTICLE VI - CEILING PRICE

For Work-Days Ordered:	$19,880
For Other Direct Costs:	9,548
CEILING PRICE	$29,428

The Contractor shall not be paid any sum in excess of the ceiling price.

ARTICLE VII - USE OF GOVERNMENT FACILITIES AND PERSONNEL

Office space for the Contractor's field work will be provided by the Mission.

A. The Contractor and its employees or consultants are prohibited from using U.S. Government facilities (such as office space or equipment) or U.S. Government clerical or technical personnel in the performance of the services specified in the contract, unless the use of Government facilities or personnel is specifically authorized in the Order, or is authorized in advance, in writing, by the Contracting Officer.

B. If, at any time, it is determined that the Contractor, or a· of its employees or consultants, have used U.S. Government fa.ilities or personnel without authorization, then the amount payable under the contract shall be reduced by an amount equal to the value of the U.S. Government facilities or personnel used by the Contractor, as determined by the Contracting Officer.

C. If the parties fail to agree on an adjustment made pursuant to this clause, it shall be considered a "dispute" and shall be dealt with under the terms of the "Disputes" clause of the contract.

ARTICLE VIII - LOGISTIC SUPPORT

Other than as noted above, the Contractor shall be responsible for and should provide all logistic support as required, to successfully perform under the terms of this Delivery Order.

ARTICLE IX - PURCHASE OF NON-EXPENDABLE ITEMS

This Order does not require and Contractor shall not purchase any non-expendable items for performing activities as described in the Statement of Work (Article I, above).

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ARTICLE X - DUTY POST

The principal duty post for this Delivery Order is Amman, Jordan and Washington, D.C.

ARTICLE XI - EMERGENCY LOCATOR INFORMATION

The Contractor agrees to provide the following information to the A.I.D. Mission/Representative in the host country on or before the arrival in the host country of every contract employee or dependent:

A. The individual's full name, home address, and telephone number.

B. The name and number of the contract, and whether the individual is an employee or dependent.

C. The Contractor's name, home office address, and telephone number, including any after-hours emergency number(s), and the name of the Contractor's home office staff member having administrative responsibility for the Contract.

D. The name, address, and telephone number(s) of each individual's next of kin.

E. Any special instructions pertaining to emergency situations such as power of attorney designees or alternate contact persons.

ARTICLE XII - LANGUAGE REQUIREMENTS

Contractor personnel performing under this Order are required to possess the English language communication skills.

ARTICLE XIII - ACCESS TO CLASSIFIED INFORMATION

The Contractor will not have access to classified information.

ARTICLE XIV - WORK WEEK

The Contractor is authorized up to a six-day in-the-field work week with no premium pay.

ARTICLE XV - PAYMENT

Payment will be made in accordance with Block 6 of the Cover Page.

ANNEX B

WORK PLAN

Proposed Work Plan for Thomas G. Lloyd

July 27, 1993 Draft

Sunday, July 25	Review documents and secondary source materials
	Meet with Peter Delp, Tourism Task Force and Alonzo Fulgham, Trade, Investment & Production
	Meet with Tourism Task Force
	Begin development of work plan
Monday, July 26	Review secondary source materials
	Overview visit to Citadel/Temple of Hercules
Tuesday, July 27	10:00 am: Meet with Ministry of Tourism and Antiquities
	11:30 am: Meeting with Royal Jordanian Airlines
	1:00 pm: Meeting with Petra hotel developer
	Complete work plan and submit to Alonzo Fulgham
	Review secondary source materials
Wednesday, July 28	Review secondary source materials
	11:30 am: Meeting with Department of Antiquities
	3:30 pm: Meeting with JETT Bus Company
Thursday, July 29	Review secondary source materials
	9:30 am: Meeting with Amra Forum Hotel GM
Friday, July 30	8:00 am: Trip to Umm el-Jimal
Saturday, July 31	Trip to southern Jordan
Sunday, August 1	Return from southern Jordan
Monday, August 2	Begin market analysis
	Trip to Madaba

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Tuesday, August 3	Continue analysis/begin draft report
Wednesday, August 4	Continue market analysis Continue draft report preparation
Thursday, August 5	Trip to northern sites and Jordan Valley
Friday, August 6	Return from Jordan Valley
Saturday, August 7	Draft report
Sunday, August 8	Discuss marketing concepts with Tourism Task Force
Monday, August 9	Draft report
Tuesday, August 10	Draft report
Wednesday, August 11	Draft report
Thursday, August 12	Submit draft report to Alonzo for distribution to Tourism Task Force for review and comment
Friday, August 13	open
Saturday, August 14	Draft report
Sunday, August 15	Meet with Tourism Task Force to discuss draft report
Monday, August 16	Revise draft report
Tuesday, August 17	Revise draft report
Wednesday, August 18	7:05 am: depart for USA

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ANNEX C

CONTACTS

Government of Jordan

Ministry of Tourism

H.E. Yanal Hikmat, Minister of Tourism and Antiquities
Nasri Atalla, Secretary General, Ministry of Tourism
Dr. Safwan Kh. Tell, Antiquities Department, Ministry of Tourism and Antiquities

USAID

W. Thomas Oliver, Director, USAID/Jordan
Bastiaan Schouten, Deputy Director, USAID/Jordan
Thomas Daily, Director, Program
Donald Reese, Director, Trade, Investment & Production
H. Peter Delp, Deputy Director, Trade, Investment & Production and Chair of Tourism Task Force
Alonzo L. Fugham, Private Sector Officer, Trade, Investment & Production
Carl Dutto, Director, Water, Environment & Agribusiness
Aied Sweiss, Water, Environment & Agribusiness
Charie Lenzen, Cultural Resources Specialist, Water, Environment & Agribusiness
Khalid A. Al Naif, Senior Consultant, Trade, Investment & Production
Michael Foster, Project Support & Monitoring
Suleiman Tarazi, Project Support & Monitoring

Private Sector

Khalil Talhouni, National Development & Supply Co. & Venture Capitalist
Riad Sawalha, Assistant Vice President Passenger Sales, Royal Jordanian
Abdel-Muhsen Mheisen, Deputy General Manager, Jordan Express Tourist Transport Company
Ali Biesha, Regional Director of Operations & General Manager, Amra Hotel
Sami H. Sawalha, Managing Director, Regency Palace Hotel

Non-Profits

Nicolas N. Sabanegh, President, Jordan Society of Tourist & Travel Agents
Patrick Crump, Small Business Development Program Manager, Near East Foundation

ANNEX D

PRELIMINARY GUIDE FOR OPERATIONALIZING JTB

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ANNEX D
PRELIMINARY GUIDE FOR OPERATIONALIZING JTB

JTB Secretariat Staffing and Operations (Section B2)

Facilities Rental

(3,000 sq. ft. @ $10/sq. ft. = $30,000/year x 5 years)

	Year One	Year Two	Year Three	Year Four	Year Five	Total
USAID	$30,000	$30,000	$30,000	$30,000	$30,000	$150,000

Furnishings, equipment, computers, car, etc.

	Year One	Year Two	Year Three	Year Four	Year Five	Total
USAID	$66,000	$1,000	$1,000	$1,000	$1,000	$70,000

Personnel

Marketing Coordinator (U.S., LOE=60 months)

Media Professional (U.S., LOE=24 months)

Market Communications Director (Jordanian, LOE=60 months)

Direct Sales Professional (Jordanian, LOE=60 months)

Meetings Coordinator (U.S. TDY)
2 assignments/year of approximately 3 weeks duration

Administrative Assistant (Jordanian, LOE=60 months)

Contingency TDY (Project Troubleshooting)
Level of Effort: 2 assignments @ 3wks. each - temporarily allocated to years one and two

Staff Travel and Related
Approximately US$20,000 per year

In-market Representation
1 part-time sales representative in each of the 4 primary targeted markets at approximately US$ 3,000/month = $36,000/yr/market x 4 = $144,000/yr x 5 years

Tourism Promotion Strategies (Section C)

Theme Development (C1)

Themes and Supporting Concepts Development

(contractor to refine three identified themes and develop supporting sell lines, concepts and the "story")

	Year One	Year Two	Year Three	Year Four	Year Five	Total
USAID	$30,000	$0	$0	$0	$0	$30,000

Theme Pretest Program

(review potential themes for cultural sensitivity and conduct focus groups in four primary target markets to test three identified themes, supporting sell lines, concepts, and the "story")

	Year One	Year Two	Year Three	Year Four	Year Five	Total
USAID	$40,000	$0	$0	$0	$0	$40,000

Route Testing: Tour Operator Fam Trip Test (C2)

(tour operator fam trip from each of four primary target markets to tour each of three theme-related routes and participate in post-trip focus groups/debriefings to confirm/refine themes and routes. JTB members will host fam trips for five tour operators from each of four markets (20) including in-kind air transport @ $1,500/ person + $100/day/ person for food, lodging and in-country transport x 7 days)

	Year One	Year Two	Year Three	Year Four	Year Five	Total
USAID	$5,000	$0	$0	$0	$0	$5,000
JTB (in-kind)	$44,000	$0	$0	$0	$0	

Marketing and Sales Support Materials Development (C3)

Develop, Produce and Print 2,000 Tour Planning Guides (tour operator sales handbooks)

(promoting cultural tourism image; themes; suggested routes; route options and potential additions; tourism attractions; hotel directory for tailored tour itineraries; and directory of Jordanian suppliers, potential tour partners, and information sources, etc. MOTA will contribute in-kind labor to assemble inventory information required for handbooks).

	Year One	Year Two	Year Three	Year Four	Year Five	Total
USAID	$50,000	$0	$0	$0	$0	$50,000*
MOTA (in-kind)	$20,000	$0	$0	$0	$0	

Develop, Produce and Print 50,000 (initially) each of Three Theme/Route Brochures in Four Languages

(50,000 x 3 themes = 150,000 x 4 languages = 600,000 brochures)

	Year One	Year Two	Year Three	Year Four	Year Five	Total
USAID	$350,000	$0	$0	$0	$0	$350,000*

* Estimate assumes printing in U.S. If printed in Jordan, cost would be less.

Cost-sharing of Tour Operator's Investment in Producing New Wholesale Tour Catalogues that Include Jordan Tours

(two new operators in each primary target market in 1994, two more new operators in primary target markets in 1995 and one new operator added each in 1996, 1997, and 1998 = 32 new tour generators x $20,000/new operator)

	Year One	Year Two	Year Three	Year Four	Year Five	Total
USAID	$160,000	$160,000	$80,000	$80,000	$80,000	$560,000

<u>Image and Awareness Building (C4)</u>

Theme Promotion and Image Building - Primary Target Markets

(supplier communications program - direct mail, travel trade and selected consumer print media communications - press releases)

	Year One	Year Two	Year Three	Year Four	Year Five	Total
USAID	$10,000	$7,500	$2,500	$2,500	$2,500	$25,000
JTB	$0	$0	$2,500	$1,500	$1,000	

Theme Promotion and Image Building - Secondary Target Markets

(travel trade and selected consumer print media communications - press releases)

	Year One	Year Two	Year Three	Year Four	Year Five	Total
USAID	$20,000	$15,000	$5,000	$5,000	$5,000	$50,000
JTB	$0	$0	$2,500	$1,500	$1,000	

Theme Promotion and Image Building - Markets of Opportunity

(travel trade print media communications)

	Year One	Year Two	Year Three	Year Four	Year Five	Total
USAID	$5,000	$5,000	$0	$0	$0	$10,000
JTB	$0	$0	$2,500	$2,500	$2,500	

Travel Writer Program - Primary Targeted Markets

(fam trips - 20 writers/year and story feeds)

	Year One	Year Two	Year Three	Year Four	Year Five	Total
USAID	$1,000	$1,000	$1,000	$1,000	$1,000	$5,000
JTB (in-kind)	$40,000	$40,000	$40,000	$40,000	$40,000	

Travel Writer Program - Secondary Targeted Markets (story feed)

	Year One	Year Two	Year Three	Year Four	Year Five	Total
USAID	$1,000	$1,000	$1,000	$1,000	$1,000	$5,000

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Market Disruption Strategy (C5)

Priority 1: Image Damage Control in Primary Target Markets

(use of in-market representatives to distribute information to tour operators and electronic and/or print press releases to the media distribution list)

	Year One	Year Two	Year Three	Year Four	Year Five	Total
USAID	$5,000	$5,000	$0	$0	$0	$10,000
JTB	$0	$0	$5,000	$5,000	$5,000	

Priority 2: Image Damage Control in Secondary Target Markets

(use of electronic and/or print press releases to the media distribution list)

	Year One	Year Two	Year Three	Year Four	Year Five	Total
USAID	$5,000	$5,000	$0	$0	$0	$10,000
JTB	$0	$0	$5,000	$5,000	$5,000	

Priority 3: Image Damage Control in Markets of Opportunity

(limited to print press releases to the media distribution list)

	Year One	Year Two	Year Three	Year Four	Year Five	Total
USAID	$0	$2,000	$0	$0	$0	$2,000
JTB	$2,000	$2,000	$2,000	$2,000	$2,000	

Earned Media Strategy (C6)

Trade and Consumer Media Communications - Primary Target Markets

(in-market representation and electronic and/or print press release feed)

	Year One	Year Two	Year Three	Year Four	Year Five	Total
USAID	$10,000	$7,500	$2,500	$2,500	$2,500	$25,000
JTB	$0	$0	$5,000	$2,500	$2,500	

Trade and Consumer Media Communications - Secondary Target Markets

(electronic and/or print press release feed)

	Year One	Year Two	Year Three	Year Four	Year Five	Total
USAID	$20,000	$15,000	$5,000	$5,000	$5,000	$50,000
JTB	$0	$0	$5,000	$2,500	$2,500	

Trade and Consumer Media Communications - Markets of Opportunity

(print press release feed)

	Year One	Year Two	Year Three	Year Four	Year Five	Total
USAID	$4,000	$3,000	$2,000	$1,000	$0	$10,000
JTB	$0	$0	$1,000	$2,000	$3,000	

Public Service Television Programming - Primary Target Markets
(market test and programming development and distribution)

	Year One	Year Two	Year Three	Year Four	Year Five	Total
USAID	$0	$60,000	$80,000	$70,000	$70,000	$280,000
JTB (in-kind)	$0	$5,000	$5,000	$5,000	$5,000	

Direct Sales (C7)

Trade Media Paid Advertising
(primary and secondary target market tour travel agents and tour wholesalers)

	Year One	Year Two	Year Three	Year Four	Year Five	Total
USAID	$100,000	$200,000	$200,000	$200,000	$200,000	$900,000
JTB	$5,000	$5,000	$5,000	$5,000	$5,000	

Target Market Sales Missions
(promotional and educational sales calls on tour packagers, tour operators and selected travel agents in primary target markets only)

	Year One	Year Two	Year Three	Year Four	Year Five	Total
USAID	$6,000	$6,000	$6,000	$6,000	$6,000	$30,000
JTB (in-kind)	$48,000	$48,000	$48,000	$48,000	$48,000	

Tour Packager and Travel Agent Fam Trips - Primary Target Markets
(fam trips - 10 tour packagers/year & 10 travel agents/year)

	Year One	Year Two	Year Three	Year Four	Year Five	Total
USAID	$0	$0	$0	$0	$0	$0
JTB (in-kind)	$0	$40,000	$40,000	$40,000	$40,000	

Europe Trade Show Sales
(exhibit development - year one, exhibit space rental, exhibit shipping costs, booth staff registration, materials, etc.)

	Year One	Year Two	Year Three	Year Four	Year Five	Total
USAID	$70,000	$20,000	$20,000	$20,000	$20,000	150,000
JTB (in-kind)	$20,000	$20,000	$20,000	$20,000	$20,000	

European Trade Show Hostings
(event space rental and other hosting expenses)

	Year One	Year Two	Year Three	Year Four	Year Five	Total
USAID	$0	$10,000	$10,000	$10,000	$10,000	$40,000
JTB (in-kind)	$0	$10,000	$10,000	$10,000	$10,000	

Indirect Sales (C8)

Visitor Satisfaction Program (tourism resources improvements)

	Year One	Year Two	Year Three	Year Four	Year Five	Total
USAID	$0	$0	$0	$0	$0	$0

(costs are included in other parts of the project - i.e., site development)

Strategy to Promote In-Country Understanding of the Economic Potential of Tourism (C9)

Royal Conference on Cultural Tourism
(exhibit materials and print materials)

	Year One	Year Two	Year Three	Year Four	Year Five	Total
USAID	$5,000	$5,000	$5,000	$5,000	$5,000	$25,000
JTB (in-kind)	$50,000	$50,000	$50,000	$50,000	$50,000	

Market Monitoring and Evaluation (C10)

Baseline Database Development
(visitor intercept surveys at Petra in year one)

	Year One	Year Two	Year Three	Year Four	Year Five	Total
USAID	$30,000	$0	$0	$0	$0	$30,000

Marketing Program Evaluation
(visitor intercept survey at Petra in year four to update baseline database)

	Year One	Year Two	Year Three	Year Four	Year Five	Total
USAID	$0	$0	$0	$30,000	$0	$30,000

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ANNEX E

EXIT SURVEY

Proposed Specifications for Sampling July 26, 1993

Contractor to conduct intercept surveys at and/or near Petra as follows:

January:	2,000 completed personal interviews
April	2,000 completed personal interviews
July	2,000 completed personal interviews
September	2,000 completed personal interviews

Potential interviewees will need to be screened to arrive at the targeted audience for the survey. In general, the target audience for the survey is European and North American visitors to Jordan. It is expected that the targeted audience will make up 55-80% of the total visitors to Petra depending on season of interviewing.

The specific target audiences for the survey are visitors from:

North America:	
United States	475 anticipated completed interviews
Europe:	
United Kingdom	225 anticipated completed interviews
Italy	225 anticipated completed interviews
France	180 anticipated completed interviews
Germany	250 anticipated completed interviews

It will be the contractor's responsibility to develop appropriate screener questions to eliminate interviews of individuals that are not part of the desired sample. Suggested screener questions might include identification of nationality and whether or not the interview candidate works in Jordan (to be excluded from the sample). The contractor shall submit screening plan to USAID for approval before field work commences.

A minimum of 150 completed interviews will be required for each of five targeted countries identified above. Oversampling will be done in the case of any wave of the survey where normal sampling procedures do not yield this minimum.

Proposed Specifications for Tabulation of Data July 26, 1993

Each wave of survey data will be compiled into tables with separate banners for each question and rows for the following countries:

United States
United Kingdom
Italy
France
Germany

Canada
Finland
Sweden
Spain
Austria
Netherlands

The contractor will provide five copies (?) of tables for each seasonal survey wave. Upon completion of the four seasonal waves, the contractor will provide five copies (?) of tables which merge seasonal data into an annual compilation of the findings.

The contractor shall provide a separate cost for additional (optional) cross tabulations of the data.

Suggested Survey Questions July 25, 1993 Draft

1. What was your main purpose for visiting Jordan on of this trip?
Please check only one box.

- ❑ Vacation/holiday
- ❑ Visiting friends or relatives
- ❑ Health
- ❑ Diplomatic/government business
- ❑ Business
- ❑ Transit
- ❑ Study
- ❑ Other ______________________ (please specify)

2. How many nights did you spend in Jordan on this trip?

- ❑ one night
- ❑ two nights
- ❑ three nights
- ❑ four nights
- ❑ five nights
- ❑ more than five nights _______ (indicate number of nights)

3. How many nights did you spend in each of the following types of accommodations while in Jordan on this trip?
Please indicate the number of nights spent in each type of accommodations.

_____ (no. of nights) In the home of friends or relatives
_____ (no. of nights) hotel
_____ (no. of nights) guest house
_____ (no. of nights) camping
_____ (no. of nights) other ____________________ (please specify)

3a. If you stayed in one or more hotels while in Jordan, please indicate below the name of the hotel or hotels you stayed in?

____

4. What other countries did you visit on this trip?
Please check as many as apply.

- ❑ Egypt
- ❑ Israel
- ❑ Lebanon
- ❑ Saudi Arabia
- ❑ Syria
- ❑ Turkey
- ❑ Other ________________________ (please enter names)

5. On this trip to Jordan, which of the following activities and attractions did you visit? (list needs to be shorter - text in parentheses is to jog the memory of interviewees that don't remember the names of sites)
Please check as many as apply.

- ❑ Roman Theatre (Amman)
- ❑ King Hussein Mosque (Amman)
- ❑ Nymphaeum fountain (Amman)
- ❑ Citadel (Amman)
- ❑ Folklore Museum (Amman)

- ❑ Traditional Jewels & Costumes Museum (Amman)
- ❑ National Archaeological Museum (Amman)
- ❑ Jordan University Archaeology Museum (Amman)
- ❑ Village of Salt (Ottoman architecture)
- ❑ Village of Wadi Seer (ancient aqueduct)

- ❑ Addeir (Monastery facade cut into the rock near Wadi Seer)
- ❑ Qasr al-Abd (Castle of the Slave near Wadi Seer)
- ❑ Araq al-Amir (Cave of the Prince near Wadi Seer)
- ❑ Ruins of the Roman town of Jerash (Triumphal Arch, hippodrome, Temple of Zeus, the Forum, South Theatre, the cardo, Eastern Baths, Agora, Church of St. Theodore, omayyad Building, Nymphaeum, Temple of Artemis, Viaduct Church, Northern Tetrapylon, West Baths, North Treatre, North Gate, Jerash museum)
- ❑ Ajlun (Qala'at ar-Rabad Arab castle from the era of the Crusades, Mosque)

- ❑ Irbid (Museum of Jordanian Heritage, Natural History Museum)

- ❑ Umm Qais (view of Golan Heights and the Sea of Galilee, site of Gadara, one of the cities of the Decapolis - Western Treatre, colonnaded street, mausoleum, baths)
- ❑ Al-Hemma (Roman baths)
- ❑ Umm Al-Jimal (black city)
- ❑ Deir Alla (Biblical history)

- ❑ Ancient city of Pella (West Church, Civic Complex Church, theatre, Nymphaeum, East Church)
- ❑ Dead Sea
- ❑ Desert Castles east of Amman (Qasr Al-Hallabat, Hammam As-Sarakh, Qasr al-Azraq, Qusayr'Amra, Qasr al-Kharanah, Qasr al-Mushatta)
- ❑ Azraq (Oasis town with Lawrence of Arabia ties)
- ❑ Shaumari Wildlife Reserve

- ❑ Madaba (map of Palestine mosaic in St. George's Church, museum, mosaic in Church of the Apostles)
- ❑ Mt. Nebo
- ❑ Hammamat Ma'in (hot springs and resort)
- ❑ Machaerus (Biblical history - ties to John the Baptist, Al-Meshneq fort, Roman baths, ruins of Herod Antipas' palace)
- ❑ Wadi al-Mujib Canyon

- ❑ Town of Kerak (Crusader castle/fort, museum)
- ❑ Town of Ar-Rabba (Roman temple)
- ❑ Village of Dhat Ras (Nabataen and Roman ruins)
- ❑ Tafila (gorge of Wadi al-Hesa)
- ❑ Shobak (Crusader castle/fort)

- ❑ Petra
- ❑ Ma'an
- ❑ Wadi Rum (desert scenery, rock climbing, connections to Lawrence of Arabia)
- ❑ Aqaba (Arab fort, museum, aquarium, Pharaoh's Island, beaches, diving)

6. How many times have you been to Jordan before, not including this trip?

_________ (number of times)

7. How many times in the past 5 years (3 years), not including this trip?

   ________ (number of times)

8. How likely are you to recommend Jordan as a vacation/holiday destination to friends or relatives?
   Please check the answer that most closely reflects you feelings.

   - ❑ I will definitely recommend Jordan to others
   - ❑ I might recommend Jordan to others
   - ❑ I will probably not recommend Jordan to anyone
   - ❑ I definitely will not recommend Jordan to anyone
   - ❑ I don't know if I will recommend Jordan to others

9. How likely are you to return to Jordan on a vacation/holiday trip in the next three years?
   Please check the answer that most closely reflects you feelings.

   - ❑ I will definitely return to Jordan in the next three years
   - ❑ I will definitely return to Jordan, but I don't know when
   - ❑ I am not sure if I will return in the next three years
   - ❑ I am sure that I will not return to Jordan in the next three years
   - ❑ I don't know

10. On this trip to Jordan, how many people in your personal travel party were in each of the following age groups?
    Please enter the number of individuals in your personal travel party that are within each of the following age groups.

    ______ (number of people) under 18 years of age
    ______ (number of people) 18 to 24 years
    ______ (number of people) 25 to 34 years
    ______ (number of people) 35 to 44 years
    ______ (number of people) 45 to 54 years
    ______ (number of people) 55 to 64 years
    ______ (number of people) 65 to 74 years
    ______ (number of people) 75 years or older

11. What was the one thing you liked best about your trip to Jordan?

____

____

12. What was the one thing you liked least about your trip to Jordan?

____

____

13. Thinking about this trip to Jordan, about how much did you and the members of your travel party spend on each of the categories of trip expenditures listed below?
Please provide your best estimate for each expenditure.

Lodging accommodations	JD (________)
Food and beverages	JD (________)
Transportation bought and paid for in Jordan (air, taxi, bus, etc.)	JD (________)
Gifts and souvenirs	JD (________)
Entertainment and admissions (sightseeing, entrance fees, etc.)	JD (________)
Personal incidentals (health care products, beauty shop, etc.)	JD (________)
Other expenditures	JD (________)
Total amount spent in Jordan	JD (________)

14. In what country do you presently reside?
Please indicate the place where you live currently.

____ (country of residence)

N

The following is for statistical purposes only.

15. Sex ❑ male ❑ female

16. Nationality ____________________

17. What is the highest level of education you have completed?

- ❑ high school/secondary not completed
- ❑ high school/secondary school completed
- ❑ some college completed
- ❑ college graduate
- ❑ post graduate work/graduate degree(s)

18. Please indicate if the total approximate income of your household is . . .

- ❑ less than $25,000US per year?
- ❑ more than $25,000US but less than $40,000US?
- ❑ more than $40,000US but less than $55,000US?
- ❑ more than $55,000US but less than$70,000US?
- ❑ more than $70,000US but less than $85,000US?
- ❑ more than $85,000US but less than $100,000US?
- ❑ more than $100,000US?
- ❑ Don't know

Thank you very much for providing information that will make your next visit to Jordan even better!