

**Achievement of Market-Friendly Initiatives and Results Program
(AMIR 2.0 Program)**

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Design and Lead the Strategic Planning Process

Final Report

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I. Executive Summary

The Petra Retreat was designed as a concentrated get together by Senior Stakeholders in Tourism, led by HE Dr. Taleb Rifa'i, the Minister for Tourism and Antiquities, and including officials, JTB, Tourism Associations, Investors and Tourism Operators.

The preparation for the Petra Retreat included the development of the overall agenda, agenda objectives, agendas for each of the theme groups and supporting facilitation documentation.

The attendance was excellent and HE the Minister remained until the completion of the Retreat.

It became very clear early in the Retreat that the overriding concern of the Private Sector, investors and major players, was the problem caused by the overhang of debt in terms of investment already made in hotels and low occupancy that cannot remunerate the outstanding capital loans.

It was decided, therefore, to concentrate on a Recovery Plan for 2003 and the Strategy for 2004 – 2010 in the context of two themes – Marketing and Product Development.

The delegates in plenary session and in groups gave extensive inputs of their views, proposals and concepts.

Overnight the Consultant, with AMIR support, produced the Recovery Plan entitled “The Tactical Bridge Strategy 2003: Returning Jordan to Growth”. It is included in the report in full. It was presented through PowerPoint to the delegates, but each delegate left Petra with a printed copy of the Plan.

The essence of the Bridge Strategy is that it focuses on achieving a return to growth in 2003 by targeting 150,000 additional visitors, and provides “the bridge” to the long-term strategy 2004 – 2010.

It introduces a number of new tipping point approaches.

- The concentration of effort will be on Gulf and Arab markets.
- Niche markets will be targeted in Europe and North America.
- Extension of normal visitors by one overnight would be a priority.
- Priced offers will be promoted directly to the consumer in the Gulf and Arab markets.
- Research will be beefed up to enable accurate targeting.
- There would be “on the ground” promotions in Gulf and Arab Cities.

It was made clear that this plan was in addition to the normal JTB Programme, and would require additional budget from Government.

There was general acceptance of the concept and main tenets of the Plan, but further discussion is needed on resource allocation.

The Tactical Bridge Plan is to be developed to implementation by the JTB, assisted by AMIR and all other stakeholders. It will require a driver to ensure that the additional marketing tasks, brochure production and promotion are planned and undertaken effectively.

The Strategy for Jordan 2004 – 2010 will be developed initially from the inputs made at Petra, and the experience and capacity of the Consultant. The process will be assisted by the four theme committees:-

- Marketing and Promotion
- Product Development and Investment
- Human Resource Development
- Regulatory and Institutional framework.

These committees will continue to require assistance and guidance.

The final outputs will include:-

- The Tactical Bridge Plan 2003
- The strategy for Jordan 2004 – 2010
- The Action Plan derived from the strategy to ensure consistent implementation.

II. Petra Retreat Overview

The Petra Retreat was designed as a concentrated get together by the most senior tourism stakeholders, including HE The Minister, Officials, JTB, Tourism Associations, Investors and Tourism Operators.

Prior to the meeting at Petra, the Consultant worked with the AMIR team to develop the theme and agenda for the retreat. The primary objective of the retreat was to identify major strategic issues and challenges facing the tourism industry in Jordan. This was designed to be achieved through brainstorming sessions as well as analysing strategic issues particular to 1. Marketing & promotion, 2. Product development, 3. Human resources development, and 4. Legal and regulatory issues.

It became clear following retreat initiation that the current crisis afflicting tourism in Jordan was a real barrier, which directly affected the private sector and was a concern for all. The current downturn in visitor numbers, against a background of recent expansion of accommodation had created a crisis situation. With accommodation occupancy rates running at only 35%, investors are unable to service the accumulated capital debts.

It is understandably difficult to get people to look to future strategies, when their focus is on immediate survival issues and close horizons.

Given the circumstances, and following consultation with the industry leadership, it was agreed that marketing and product development would be prioritised in the context of:

- A Tactical Plan for 2003
- A Strategic Plan from 2004 to 2010

It was agreed that that while important:-

- Human Resources, and
- Institutional Framework

could not be tackled until the prioritised subjects were fully explored and agreed, as they follow from these requirements. Accordingly, the subject matter experts worked with three groups on issues relevant to product development and marketing and promotion in the long-term context.

A separate focused session for the Strategy Steering Committee with the consultants was dedicated to work up a detailed Short Term Strategy for 2003

The result was the Tactical Bridge Plan – a plan to return Jordan to growth by the end of 2003, linked with the new strategy from 2004 through the input gained from both the marketing and promotion and product development work groups (Refer to section II.3 for the short-term strategy document).

The subsequent section provides a summary of issues discussed addressing the following:

- Marketing & Promotion

- Product Development
- Tactical Bridge Strategy

1. Marketing & Promotion Work Group

Discussions of the marketing and promotion work group focused on issues related to image and positioning in the long-term context. In-depth discussion of target markets prioritised the need to focus on the following:

1. Family tourism
2. FIT and special interest
3. Domestic tourism.

A number of tourism segments were identified and prioritised based on which the following were found to possess the highest future potential:

- Health and wellness (Dead Sea, hospitals, and Ma'een)
- Adventure tourism
- Religious tourism.
- MICE

For each of the above segments, target markets were identified and listed in detail.

The group assessed Jordan's competitiveness across the various tourism segments and drafted tactical steps and recommendations to enhance the overall marketing and promotion of Jordan. Specifically, the group explored strategies relevant to the following; packaging, promotion, advertising, public relations, and promotional events (for details refer to "Creating a Shared Vision: Building a National Tourism Strategy Through Partnership" report – task number 262.2).

2. Product Development Work Group

The product development team assessed Jordan's capabilities in terms of the following six pillars:

1. Accommodation
2. Food and restaurant experience
3. Transportation
4. Things to see and do before 6:00 pm
5. Things to see and do after 6:00 pm
6. Tourism services

Based on assessment results, suggestions for short-term and long-term strategies were developed tailored to the European and the Gulf markets. Specific strategies with corresponding budget and responsibilities were assigned (for details refer to "Creating a Shared Vision: Building a National Tourism Strategy Through Partnership" report – task number 262.2).

3. Tactical Bridge Plan

Participants focused their discussions on strategies that would return Jordan to growth by 2003. The result was a short-term plan that summarised the initial input of participants, which needs to be further developed and detailed so that corresponding action plans could be drafted.

Returning Jordan to Growth The Tactical Bridge Strategy 2003

Background

The Strategic Tourism Contract proposed for Jordan will address the five years 2004–2008 inclusive and will come later in 2002.

The Tactical Bridge Strategy plans to return Jordan to growth in the 2003 year through the methodology of a one off tactical plan, which will be operationally parallel to the JTB plan but integrated with it and managed by the JTB with technical assistance from AMIR.

It is proposed that the JTB plan for 2003 be primarily focused on maintaining the circa 1.3 million visitors and the level of activity and market presence that can be secured through its existing budget.

It is proposed that the growth element of circa 150,000 visitors (to be affirmed by research and expressed in room nights and revenues) be achieved through the “Tactical Bridge Plan”.

The Principles

The context of implementation is governed by a series of Principles, which are designed to enable certain fundamentals. These Principles, which are used here, will also have relevance to the strategic considerations which will come later. They are compressed and stated simply for the “Tactical Bridge Plan”.

- **The Investor Principle**

- (a) No one (including government) should be asked to invest in tourism unless they can receive a specified return which justifies their investment.
- (b) Investment is the principle and dominant determinant of future success. This includes investment in product development, marketing, human resources, capacity, quality ... etc.

The only effective way of measuring ROI is that tourism must undertake to produce returns that are higher and more sustainable than comparable sectors at home and international competitors externally.

- **The Domain Principle**

- (a) Tourism is the domain of the private sector, but the private sector cannot succeed unless it is strategically supported by government, the Jordan Tourism Board (JTB) and the public sector generally.
- (b) The private sector is the engine of growth. It is the task of government to create the context in which they can succeed and to support and facilitate that success.

- (c) The JTB manages work, influences work and acts as a catalyst. This enables it to improve the success environment for tourism across a range of areas where it does not have functional authority.

- **The Partnership Principle**

Anything, which requires to be done, can more effectively be done through partnership. Partnerships are targeted on and sustained by the achievement of objectives and results.

The fundamental principle of Partnership is that the partners with power, invest some of that power in a power pool which is controlled by the agreement and will of all Partners. Partnerships which are not decision making are not partnerships.

- **The Language Principle**

Tourism is an economic activity. It can best explain its objective, targets and results to government and investors in the language of economics – revenues, taxation yields, employment creation, regional development .. etc.

The language of tourism should eliminate as far as possible the use of terms which have diminished meaning such as visitor numbers.

The Tactical Bridge Plan – Growth Issues

The Tactical Plan will incorporate elements bearing on the following spread of issues which are designed to win room nights and revenues, maximize support for locally produced goods and services, reduce leakage, grow employment and spread benefits regionally:

- Focused target markets
- Smart marketing
- Expenditure leverage
- Events

Focused Target Markets

The Tactical Bridge Plan will seek to synergise its effects by focusing its fire power on limited target markets.

- The primary markets will be Regional Arabic markets including GCC and others as these near markets offer the best potential to deliver market share and revenue growth
- (Marriott global research details the region's outbound tourism characteristics:
 - Tourism expenditures exceed US\$27 billion
 - Outbound GCC tourists generate 199 million room nights
 - Expenditure is 250% of European levels at approx. \$1800 per person)

- There are some problems with statistics and research. JTB research shows that circa 50% of “rubber tyre ” market pass through Jordan within 24 hours. This may distort past figures but not a problem for the tactical targets.
- The support markets will be selected researched segments in the following markets:
 - USA
 - UK
 - Germany
 - France
 - Italy

Smart Marketing

Smart marketing is generally achieved through measures which are designed to extend the stay of existing visitors. This will be part of the Tactical Bridge Plan but will not count towards the targets set. **It will be an extra gain.**

The current length of stay is assumed to be 4.2 nights (derived from coach / group statistics). The target is to extend to giving a real gain and uplift with a target of 6.

This will require a precise re-engineering of the product, strong product choices, negotiations with tour operators and significant change at some sites to ensure length of stay potential.

Expenditure Leverage

Visitor expenditure rather than visitor numbers is the key issue. It is suggested by the consultants that Jordan has weakness in this area.

- The level of information available at accommodation in terms of “what to see” and local experiences is low.
- The level of organization specifically designed to leverage expenditure is low.
- The exposure to crafts and art should be enhanced and can be improved in the short term.

Events

Events have a number of values which will be used in the Tactical Plan to attract visitors to gain publicity, to deal with seasonal or spread issues.

Jordan Capacity

The focus will be on Jordan’s capacity in the paid serviced accommodation sector. This stands at 17,000 rooms producing product availability of 17 million room / nights. The emphasis is recommended on room nights (not bed nights). Room rates present much better to the market and provide more score and flexibility for innovation and value.

Research

The available data on tourism arrivals and associated quantitative/qualitative data is currently unreliable and not capable of being used as a sound basis for decision-making. Research to underpin and inform decision- making is weak and must be corrected as it is a fundamental. AMIR can assist. Cost effective tourism marketing. and fulfilment of the investor principle requires quality market research.

An immediate action point is the development of a methodology to qualify and verify data on GCC/Arab region arrivals.

Market research sharing, market research co-operation are essential long term. This will involve RJ and the newly developed JHA facility as well as new research on the standard areas of visitor information:

- Purpose of visit
- Product use
- Length of stay
- Expenditure
- Demographics

Where resources are scarce, the need for effective spending through targeted marketing becomes more important so as to decrease risk and to focus marketing activity on high yield sectors. This applies to JTB.

A necessary product which JTB must produce is reliable information for the private sector to assist decision making and particularly marketing and investment decisions.

Visa procedures

The most immediate change of maximum added value to the effort would be planned change in the visa procedures and application. September 11 has heightened security precautions. Negotiations will need to determine change. This is ideal territory for partnership.

Proposal is to ask the security authority to study how this can be achieved and to fund the study.

Products

Jordan will continue to promote and sell its full portfolio of products. For the purpose of the tactical campaign a selection has been made.

There will be a concentration on a number of priority areas:

- Family segment (regional Arabic countries only)
- FIT and special interest (regional Arabic countries and the selected segmented markets in the countries indicated).
- Activity based holiday packages- European markets
- MICE – Regional (meetings/events)/US (incentive)

Family

Family product is weak but we must go with the available product as the sector presents itself as an attractive target market. It is currently unsupported by market research but worth the risk. It will envisage offers, which are appropriate to families including short stay, medium stay and long stay possibilities. Key highlights include:

- Jordan is a safe environment
- Jordan is family friendly

- Jordan's temperature is more temperate than the region
- Jordan is affordable

The Jordanian VFR market in the Gulf area is a factor but will be discounted from growth targets as use of paid/ serviced accommodation is not high.

FIT & Special Interest

The longer- term strategy 2004-8 will envisage a shift of emphasis to both FIT and special interest. The tactical plan will begin this process.

The following products have been selected:

- Petra
- Wadi Rum
- The Dead Sea
- Aqaba
- Religious travel (pilgrimage & religiously motivated)
- Nature / adventure
- Archaeological
- Film making

- **Petra**

Petra is a top-drawer product with high international recognition. Its current presentation presents problems but we will sell what we have with one change: A request for upgraded information print, signage, implementation for 2003.

- **Wadi Rum**

A unique landscape, world class but not totally distinguishable from other similar landscapes in terms of image.

To be marketed as Jordan's "Desert Experience" which will include:

- Day trips
- Bedouin experience (overnight)
- Special interest i.e. rock climbing ... etc

A web-site is under development and will be ready to support the 2003 effort.

- **The Dead Sea**

A world class product with high international recognition and unique.

The focus will be on the "Dead Sea Experience". The products offered will include well being – expressed as treatments which are enhancing, pleasurable, stress relieving, good for you.

There are weakness in this product in terms of the 6 essential pillars of tourism but that is a longer term issue for correction.

- **Aqaba**

The product will be expressed as:

- World class scuba diving
- Cruise ship port of call
- Gateway to the golden triangle
- Charter entry point for golden triangle, Petra & Dead Sea wellness products.

- **Religious**

The product will be expressed as clusters and where appropriate trails appealing to religious whose travel motivation is pilgrimage and religious reasons.

The Baptism Site opening in July 2002 presents an opportunity for international publicity.

The presentation of the Baptism Site may require consideration longer term as some of the possibilities discussed suggest potential problems.

Jordan – gateway to the Holy Land. This is a strategic shift to take advantage of the difficulty caused by regional conflict. The detail is a creative task of associating properly the names Jordan and Holy Land.

The objective is to promote Amman as a secure and reliable gateway from which the key Holy Land sites are within easy reach and always available. The Israeli side can be added (circumstance permitting) and Jordan can offer alternative / compensatory add-ons in the golden triangle area.

- **Nature / Adventure**

For the later strategic approach it is likely that product groups will be recommended with related cross over characteristics.

For the tactical plan, Jordan will be represented as having a position of excellence in nature presentation and an excellent product in adventure. The product to be offered will include:

- Bird watching
- Flora
- Trekking
- Climbing
- Natural reserve experience
- Mountain biking

- **Archaeological**

A very strong product and with adjustment is designated for a position of excellence in the strategy.

In the Tactical Plan it is covered by previous sections with the exception of the development of motoring tour trails for FIT visitor.

• Film Industry

This has attracted success in the past and has collateral benefits. Films are large scale and Jordan has advantages. The JTB should have responsibility for film promotion.

TV commercials are more frequent and are also profitable.

A selling proposition which must include creative concepts must be devised and promoted to film makers and creative agencies.

Permits, fees, access conditions must be defined in advance and a photo library is a necessity to support ht promotion.

Marketing and Promotion

Packaging Holiday Solutions

Jordan will formulate holiday solutions (packages) which are attractive to the target market segments. These include family holiday packages as well as activity based offers that can be directly targeted at the consumer through advertising/promotions

- Competitively priced offers will focus on value-for-money and add-ons rather than pure price led offers. (Loss leader pricing can be used to attract attention, but should be used to stimulate demand for higher value packages)
- Holiday solutions for the family market in particular should highlight key attractions of Jordan as well as shopping, things to do and diversity
- Packages sold through the travel trade should attract higher than average commissions
- Packages should feature in consumer advertising and can be distributed through travel agent network in target GCC markets

Communications

- Brand Development
 - The communications platform for Brand Jordan will encompass a consistent brand marketing approach to include a clear “Jordan proposition”
 - The development of a clear proposition for Brand Jordan will inevitably be the result of a detailed brand review, underpinned by qualitative feedback from potential and past visitors to Jordan. Brand repositioning involves a detailed methodology which it is recommended is commissioned by the JTB and completed in 2002.

This will inform all brand communications in terms of imaging, design look and feel and style details across the Jordan logo/mark, collateral material and fulfilment pieces used in the market, as well as in market visitor information

- In the immediate term however, it is recommended that Jordan looks at the development of messaging that communicates unique features of Jordan and a campaign built around the proposition ‘Uniquely Jordan’ could be considered
 - “Uniquely Jordan” is a preliminary attempt to define the essence of Jordan. It is provisionally envisaged as a series of images that can be found only in Jordan and cannot be replicated by competitors. The lead images are obvious, eg:
 - The Treasury/Petra
 - The Dead Sea
 - Royal Family
 - Help is needed from all sources to expand this list to a much larger and diverse list that can ultimately be used to differentiate and distinguish Jordan competitively in its markets and in its brand formulation strategy which has been referred to above
 - The images when selected would be presented in groups under the working title “Uniquely Jordan” and images would be available to and used by the industry across their communications and marketing materials
- Advertising
 - All advertising, print, images will be consistent with brand Jordan as prescribed by the JTB. All consumer/trade advertising in all markets should be co-ordinated by the JTB in conjunction with Royal Jordanian, local market tour operators and main suppliers
 - Direct consumer advertising will be used as the key communications piece to develop demand for Jordan. Advertising in the GCC/Arab region market will be based professional media selection principles to suit target and will include TV/Print/Radio executions. These must form part of a wholly integrated campaign to maximize reach, OTS, coverage and memorability
 - Advertising in the European markets and in the US will focus on trade media and niche consumer media
 - Consumer advertising will incorporate destination messages from JTB supported by industry advertising of packaged offers
 - Co-operative advertising of the destination to the consumer between JTB and the industry will ensure a greater leverage of spend and a bigger bang for buck across all selected media
 - The industry should support and wrap-around packaged consumer offers in print advertising carried out by JTB. They will gain advertising

- coverage on a highly subsidised or discounted basis, given total spend with media outlets
- All advertising print and communications should include a clear “Call to Action”. The TV spot currently developed for use in regional advertising should include an end-frame with an offer-based call to action (RJ (or other carrier??) to support this and contribute to media spend)
 - A promotional / sales fulfilment piece which will promote Jordan, offer priced packages and provide a link to web, call center etc
 - Detailed media recommendations and a template to develop a co-operative campaign for print/radio advertising can be developed by the JTB in association with media agency or preferably, directly with selected media outlets in each market
- The Fulfilment Piece
- It is envisaged that the advertising campaign is fulfilled with a combined promotional selling piece/brochure. The piece would cover the destination attractions as well as provide local market information on packages and holiday solutions/ itineraries developed by the trade
 - The fulfilment piece should be subsidised to maximize private sector participation. Entry would be based on priced offers and advertising
- Consumer Promotions
- The capital cities of regional target markets would be considered for direct consumer promotions using the fulfilment piece these can take place through a variety of methods. The priority preference would be for shopping center / mall based promotion direct to the public consumer.
- Web-site
- Web marketing (electronic marketing) presents the best long term possibilities for placing Jordan’s products in global markets and for direct selling.
 - The development of this will be a definite component of the strategy. The Tactical Plan will work with what is there and will concentrate on:
 - Enhancement of current sites
 - Improvements in functionality
 - Linkages to direct sellers
- Public Relations
- The importance of a clear and consistent media relations campaign cannot be underestimated and should be a key part of the communications platform across all key markets. A conservative estimate would recognize the need for a quadrupling of the current number of media visits to Jordan, especially from the US
 - Beyond the region, PR activity is a key influencer to eliminate or diminish the fear factor about the region, which affects perceptions about the safety of Jordan as a destination
 - JTB has worked hard at media relations without the acceptable norm of industry support. Because of the safety / security issue, this has added

new requirement for a clear partnership approach and a sharing of the cost of PR activity in market:

- Access (air) to be provided by RJ on an as requested basis as far as possible
- Access/ hospitality provided by the industry
- Transport from car-hire sector
- JTB to pay for other areas that cannot be sponsored.
- The investor principle to apply to the arrangement.

The public relations strategy to apply across all key markets should have a number of broad principles:

- Regular news flow to trade and relevant consumer media about Jordan's tourism product, activities, events, and packaged offers
- Consistent, clear messaging about Jordan tourism and the diversity, beauty, culture, history and accessibility of the market
- Use of the Royal Family on a selected basis - provides a strong, stable, positive and glamorous image for the destination
- Sustained and proactive campaign in key primary markets, - US/ UK/ Germany/ France – to attract regular media visits to Jordan
- Investment in press office/consultants in each key market to ensure Jordan is kept top-of-mind as an exciting destination with key journalists
- Regular media events/ hospitality and communication with journalists in key markets
- Selected and targeted sponsorship of media events in source markets

The Investing Principle Assessment

The proposition that will be formulated provisionally for the tourism partnership should be directed to achieve the following target results:

Growth Targets: 2003

– Arrivals	– +150,000
– Revenue	– +JD50M
– Taxation	– +JD20M*
– Jobs	– +3,750**

- **Source: Dean & Henry studies in Ireland showed that each US\$ 1M supports 50 jobs directly and indirectly*
- ***Source: Studies in Ireland found 49% of tourist expenditure returned to exchequer in taxation*

An initial and rough estimate of additional investment required (2002) is gauged at JD 0.5M.

ENDS/

III. Conclusion and Next Steps

The strategic development process is complex and challenging, and made all the more so by the depth of the current crisis and its effects on the private sector. It is quite normal for it to have a bumpy start as participants have to develop new team working and partnership skills.

While Petra did not follow the prescribed format, all delegates expressed general satisfaction with the outcome.

H.E. Dr. Taleb Rifa'i, Minister for Tourism and Antiquities gave a most comprehensive concluding statement, which included a realistic assessment of what had been achieved, and what remained to be done.

Petra, with its residential nature and its intense meetings provided a foundation for team building and partnership. While the delegates knew each other, it was clear that they had not met in this strategic planning context, or shared their deeper feelings on the issues facing their sector.

Given these circumstances, it is necessary for the industry to get all their issues on the table for consideration. Through the combination of facilitation, plenary and group meetings, this was substantially achieved. The points have been captured through the meeting documentation, and the transcription of the half sheets used in the brainstorming.

More in depth de-briefing with the most senior representatives, including H.E. Dr. Taleb Rifa'i, JTB and others on Tuesday June 11th conveyed a number of clear messages.

- Delegates had now given into the mix the full range of their views. It would not be productive to continue to seek additional input for the present.
- The leadership now needed an outline of the strategic architecture, which would guide the work of the committees.
- H.E. Dr. Taleb Rifa'i requires, as soon as is practicable, an outline of the immediate steps with strategic and financial implications.

Detailed discussions and arguments have to proceed before priorities can be established and agreed. It is also necessary to provide clarity through discussion on fundamentals, such as competitors, (competitive set), markets (target markets and segments).

While not reached by the planned schedule, a satisfactory stage has now been reached with significant deliverables.

- The Tactical Bridge Plan to return Jordan to growth is on the table in a format to allow for deep discussion, consideration and inputs and it is “on time” for 2003.
- H.E. Dr. Taleb Rifa’i, the Minister for Tourism and Antiquities has been fully involved. He has provided superb leadership to the process, and is clear on the issues, which will involve additional expenditures, and he is willing to proceed to Government with a Plan.
- It is the expressed wish of the senior leadership to proceed now by means of a leap, rather than a step, to have developed for them the strategic architecture. This will completely make up for lost time and put the process ahead of schedule.
- There is full support for the original concept of the strategic agreement.
- The chairs of the committees are in place. Committee members are being fully fleshed out and the committee work can initiate shortly.
- AMIR has been comprehensive in supporting all stages and necessary aspects of the process.

Consequently, the following are planned as next steps.

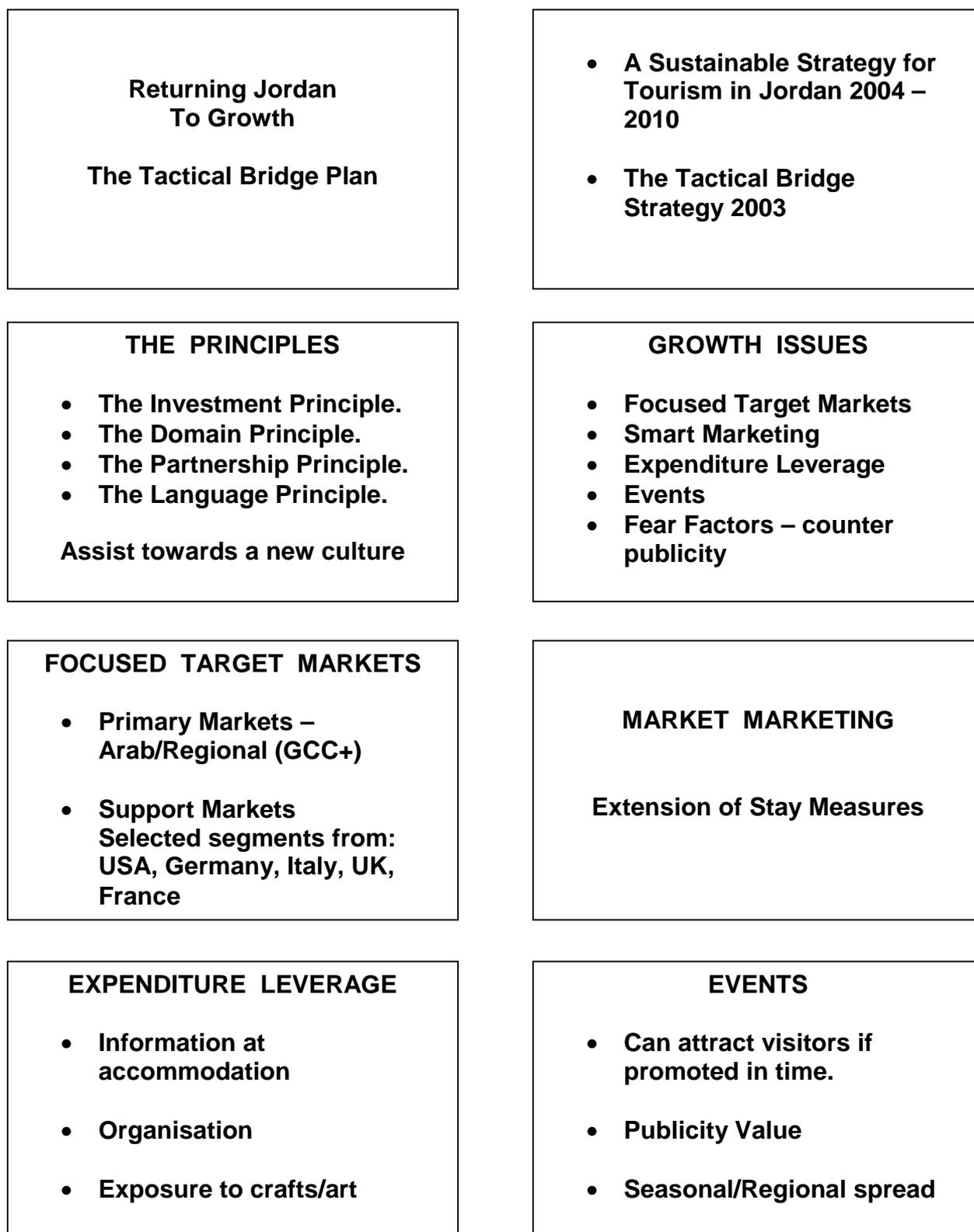
- Creation of the strategic architecture, which will guide the future work on strategy input.
- Creation of the “process manual” to assist the committees in their work.
- Draft outline of the strategic agreement in the proposed format.
- Finalisation of the Economic Impacts of Tourism document for H.E. Dr. Taleb Rifa’i, Minister for Tourism and Antiquities, to assist understanding and advocacy.
- Creation of agendas, documentation, papers and slides to back up committee chairmen.
- Recruitment of Consultants to assist the Committee Secretariat and to manage the co-ordination of the work on the 2003 Plan.

The initial strategic period was for five years, but on the advice of H.E. the Minister, this was extended to 7 years to coincide with other Government economic planning dates.

Each delegate left Petra with a copy of the Plan, which will now be developed by JTB, with the Steering Committee and AMIR technical assistance.

Annex 1 – Tactical Bridge Plan Presentation

SLIDE PRESENTATION TO DELEGATES DURING PETRA RETREAT TO EXPLAIN TACTICAL BRIDGE STRATEGY PROPOSAL



THE SELLING PROPOSITION

- **Holiday Solutions**
- **Competitive – priced – offers**
- **Specialist Communication**
- **Trends – Lifestyle, Customisation**

THE SELLING PROPOSITION

- **Media Umbrella**
- **Subsidized Co-operative Trade Selling**
- **Fulfilment – selling promotional brochures**
- **Lost Leader approach to get customer attention**

THE SELLING PROPOSITION

- **Total consistency with Brand Jordan as prescribed by JTB**
- **All media have “call to action”**
- **24/7 Call Centre**

PRODUCTS

- **Family Market**
 - **Jordan is a safe environment**
 - **Family Friendly**
 - **Cooler than Gulf**
 - **Affordable**

PRODUCT

- **FIT & Special Interest**
 - **Petra**
 - **Wadi Rum**
 - **The Dead Sea**
 - **Aqaba**
 - **Religious Travel**
 - **Nature/Adventure**
 - **Film Development**

THE SELLING METHODOLOGY

- **Priced packaged solutions**
- **Most direct methods**
- **Most offers commissionable**
- **TV/Radio in regional markets**
- **Specialist media in others**

THE SELLING METHODOLOGY

- **Call to action linked to:-**
 - **Sellers**
 - **Call Centres**
 - **Web**
 - **Agents**

THE FULFILMENT PACKAGE

- **Selling/promotional brochure**
- **Trade Partners Brochure**
- **Direct consumer promotions in selected regional capitals**

WEB MARKETING

- **Short Term**
 - **Enhancement of current sites**
 - **Improvement in functionality**
 - **Linkages to direct sellers**

COST/BENEFITS

- **Additional 150,000 Visitors**
- **Additional Revenue**
- **Start of new strategic approach**
- **Cost circa JD's 500,000+**

Annex II – Petra Retreat Agenda

THE PETRA RETREAT MEETING CREATING A SHARED VISION – BUILDING A NATIONAL TOURISM STRATEGY THROUGH PARTNERSHIP

Day 1- June 7th

12:30 Arrival and Check in at Marriott Hotel – Lunch will be available prior to opening meeting.

14:00 **Opening Plenary Session.**

Welcome by AMIR (Ibrahim Osta. He concludes by introducing HE Dr. Taleb Al-Rifa'i, Minister for Tourism & Antiquities.

Welcome by HE Dr. Taleb Al-Rifa'i, Minister for Tourism & Antiquities

Facilitated introduction of all the participants by Dr. Cathryn Goddard

14:30 **General Session – Overview of Strategic Issues for Tourism in Jordan**

Introduction and Purpose by Marwan Khoury MD of JTB

Outline of the process and Objectives (Matt McNulty)

5-minute theme setting overviews by:

- Marwan Khoury (JTB)
- Michael Nazzal (JHA)
- Hussein Dabbas (RJ)
- Munir Nassar (ITO)

Theme: Views on strategic issues and future requirements for tourism success in Jordan.

- Vision
- Strategic framework
- Teamwork, Partnership and Trust

Discussion on the overview and strategic issues Chaired by HE. Dr. Taleb Al-Rifa'i , facilitated by Dr. Cathryn Goddard, with brainstorming on the three major issues as outlined above.

Target outcomes from session

- Opportunity for industry leaders to identify major strategic issues.
- Opportunity for all to express their views and ideas on the issues.
- Developing teamwork, partnership and trust.
- Facilitation to ensure participation and identify areas of consensus and diversity.
- Preparation for greater focus and ordering of issues for next stages of process.

17:00 **Refreshment break**

17:30 Separate meetings in two groups, assisted by Dr. Cathryn Goddard and sector experts.

Group A - Marketing and Promotion Work Team

Group B - Product Development Work Team

Sector Expert will address the subject (10 minutes max.). There will be an agenda for each session, with roles to facilitate the process and a brief review following the task.

Target outcomes from session

1. Agreement on max 10 major issues by each group in order of priority.
2. Initial gathering of ideas and concepts from group.
3. Discussion on next steps.

19:00 **Plenary session**

Brief feedback reports on results from group sessions

20:00 **End of first working day.**

20:30 **Dinner**

Day 2 - June 8th**09:00 Plenary Session**

Chaired by Mr. Nadim Mouasher.

Theme – The major issues that have been identified so far and proposals for action or solution where available.

Open discussion on the issues and actions identified taking one issue at a time. This session will need optimum facilitation to ensure high yield participation.

Target outcomes from session

- Good information sharing of views and ideas on the issues.
- Greater clarity on the importance and priority of issues.
- Shaping of strategic approach.
- Commitment to next steps and further meetings.
- Assessment of future assistance required from sector experts.

10:30 Refreshment Break

11:00 Resumed meetings of the two groups separately to consider the refined issues assisted by facilitators.

Group A - Marketing and Promotion Work Team
Group B - Product Development Work Team

Target outcomes from session

- As for previous meeting, but with greater clarity and focus.
- Identification of priority areas for immediate growth.
- Identification of “quick gain” opportunity areas.
- “Smart Marketing” ideas (extending stay etc)
- Product Marketability.

12:30 Lunch break**14:30 Plenary Session**

Presentation of the current or planned promotional images of Jordan as used or proposed for advertising.

- Malia Asfour (JTB)
- Hussein Dabbas (RJ)

- Discussion on the characteristics and image of Jordan to maximise impact and differentiation.
- Any research on image would be most welcome.

Facilitated process to determine stakeholders views on the images shown or discussed, and their effectiveness and why? There are two questionnaire forms for this session.

15:50 **Refreshment Break**

16:00 Meeting of stakeholders in two groups to consider:

- | | | |
|---------|---|--|
| Group C | - | Human Resources |
| Group D | - | Regulatory and Institutional Framework |

Target outcomes from session

- Agreement on 10 max major issues for each group in order of priority.
- Initial gathering of ideas and concepts from groups.
- Agreement on future working and next steps.

17:00 **Refreshment break**

17:30 **Plenary Session**

Session feedback from the two groupings and identification of next steps for each.

- | | | |
|---------|---|--|
| Group C | - | Human Resources Work Team |
| Group D | - | Regulatory and Institutional Framework |

Target outcomes from session

- Greater clarity on the importance and priority of issues
- Assessment of future assistance required from outside sector experts
- Commitments to next steps and further work meetings

19:00 End of second day.

20:00 **Dinner**

Day 3 – June 9th

09:00 The future positioning of Jordan and its priority markets.

Introductory statements on positioning by selected stakeholders, representing different sectors, will be facilitated prior to the group discussion.

Group discussion on positioning, image and differentiation of Jordan in international markets.

Wrap up remarks on positioning of Jordan by JTB at the conclusion of the session.

11:00 **Refreshment break**

11:30 **Closing Session**

Summary of where we are in process and identification of settled issues and pending issues. (Matt McNulty).

Structured discussion on the pending issues.

Agreement on next steps and tasks.

Concluding Remarks

- Ibrahim Osta
- Marwan Khoury
- Matt McNulty

14:00 **Lunch break**

Target outcomes from Petra retreat

- Good information sharing
- Teamwork and co-operation, with methods to sustain.
- Acceptance of the importance of partnership working.
- Emerging clarity on the issues and priorities.
- Belief that the issues can be effectively dealt with.
- Understanding of, and commitment to the process.
- Confidence that a good strategy can be achieved through the process.
- Support for strategic agreement concept.

15:30 Work Session for Committee Chairs

Target outcomes from session

- Feedback on process and meetings.
- Agreement on next steps.
- Assignment of action responsibilities.
- Commitment to process.

Next major step is to outline a shape for the strategy and to consider targets, inputs, actions and commitments by the partners

Annex III – Work Groups Agendas

As part of the preparation for Petra a number of documents were prepared as follows:

- Group A: Marketing and Promotion Work Team
- Group B: Product Development Work Team.
- Group C: Human Resources
- Group D: Regulatory and Institutional Framework

GROUP A MARKETING AND PROMOTION WORK TEAM

Sector Expert: Orla Branigan

Purpose:

In the context of the current marketing and promotion of Jordanian Tourism to propose measures to enhance performance so as to: -

- Return Jordan Tourism to growth.
- Organise so as to deliver the future targets and objectives required by the strategy.
- Establish priorities.
- To refresh or confirm the images messages and methodologies used to market Jordan.

Discussion Areas:

Markets:

- What Countries?
- What Cities?
- What Segments?
- What Niches?
- What Priorities?

Messages:

- What reasons are we giving to visitors to come to Jordan?
- What strengths are we stressing?
- What are our customers telling us?

Methodologies:

- Advertising
- Promotions
- Literature

- Direct Marketing
- Web
- Niche Marketing

Marketing Assets:

- Market Research
- Visitor Research
- Representation in Markets.
- HR Capabilities of JTB and Industry.
- Trade Involvement in marketing and/or co-operative marketing.

Organisations:

- Ministry
- JTB
- Industry JTB co-working
- Public Private Partnership
- Carriers/JTB co-working
- Access to country and regions

Resources:

- Budgets
- Resource integration
- Skills
- Organisation Capabilities
- Staff Capacities
- Donor Support
- Technical Assistance

**GROUP B
PRODUCT DEVELOPMENT WORK TEAM**

Sector Expert: Sean Browne

Purpose:

In the context of the current products Jordan markets or possesses to consider:-

- The marketability and competitiveness of the products.
- Issues of value, quality and service delivery.
- Issues of planning, product development and investment, including incentives and their application.
- Issues of organisation of product providers.
- Issues of the presentation of the product both physical and HR (signage, historic sites etc.)
- Environmental sustainability and excellence.

In the context of returning Jordanian Tourism first to growth, and then to the achievement of the targets and objectives of the strategy to consider and recommend:

- What changes require to be made in the product area to meet future requirement?
- To rank the top 10 priority products in order of economic merit for Jordan.
- To identify areas of opportunity for product development, investment, the creation of centres and touring routes.
- To identify and recommend action on areas, which diminish marketability or competitiveness (signage/language etc.).
- To refresh or confirm the product images for promotion.
- To consider what planning or research projects could assist the process.
- To indicate what technical assistance is required.

GROUP C HUMAN RESOURCES

Technical Assistance: **Orla Branigan**

Purpose:

Since all high performance is brought about by the Human Resource element, to examine the Human Resource skills and capabilities, and their role in returning Jordan Tourism to growth, to provide high quality tourism experiences and service, and to drive the objectives and targets envisaged by the strategy.

Specifically to look at the institutional framework and Jordan's capabilities to provide Human Resource training at various levels: -

- Senior Management
- Management
- Marketing
- Languages
- Technical Training
- Craft Training
- Third Level (Degree/Diploma)
- Re-skilling
- Advanced skilling

To look at the methodologies used to deliver training:-

- Residential
- Day Release
- On the Job
- Train the Trainer
- Distance Learning
- Recruitment Level

To assess study visit or placement opportunities to enhance management/staff skills.

To examine the public and private resources devoted to training, and to propose how value can be enhanced or improved.

GROUP D

REGULATORY AND INSTITUTIONAL FRAMEWORK

Technical Assistance: Sean Browne

Purpose:

As the regulatory and institutional framework provides an empowering environment for tourism, it requires to be examined in the context of its effective contribution to returning Jordanian Tourism to growth and delivery of the objectives and targets of the strategy.

1. Admission to Jordan

- Visa and Entry Regime
- Role of Embassies
- Availability of Information
- Customs and Immigration
- Police
- Crime
- Visitor Rip Offs
- Services Regulation (Taxi, Guides etc)
- Security

2. Regulation of Product

- Quality Standards
- Licensing of Products
- Grading and Classification
- Licences
- Provision of Information
- Complaint Handling

3. Regulation of Business

A. As it applies to the business and investment environment:

- Establishing Companies
- Company law
- Dispute Resolution
- FDI Friendly
- Financial Controls
- Taxation
- Incentives
- Licensing

B. As it applies to development

- Planning (Physical)
- Permission and Licences for New Development
- Control of building standards (S.B.S.)

- Environmental restrictions and controls

4. Institutional Framework

A. Public Sector Institutions (Ministries).

- Public Sector Agencies
- Public/Public Partnerships
- Efficiency of Public Bodies
- Training Agency
- Investment Support Agencies
- JTB
- RJ

B. Private Sector Organisation

- Accommodation (Hotels etc.)
- Travel Services
- Transport Services
- Product Providers
- Public/Private Partnerships

Annex IV - Questionnaire on competitor and competitive countries.

Which of Jordan's competitor countries do you consider presents **the toughest international competition** to Jordan?

Country	
----------------	--

Why? (Give 3 reasons)

1. _____
2. _____
3. _____

Which of Jordan's competitor countries **advertising** impresses you most?

Country	
----------------	--

Why? (Give 3 reasons)

1. _____
2. _____
3. _____

Which of Jordan's competitor countries **image** is projected best?

Country	
----------------	--

Why? (Give 3 reasons)

1. _____
2. _____
3. _____

Which of Jordan's competitor countries **positioning** do you think poses the most difficult challenge for Jordan?

Country	
----------------	--

Why? (Give 3 reasons)

1. _____
2. _____
3. _____

Jordan competes with other destinations on a number of levels. Can you rank Jordan's most direct and effective competitors in these areas?

As a Country to visit for holiday:

Country	Rank

As a Heritage Experience:

Country	Rank

As a Religious Experience:

Country	Rank

As a Leisure Destination:

Country	Rank

As a Family Holiday Destination:

Country	Rank

As a Short Break Destination: -

Country	Rank

Annex V - Market Making & Market Driving Elements

Market Making Elements:

Indicate your view on the current adequacy of these elements to serve Jordan's future growth aspirations by ticking the choice box, which most adequately reflects your view or perception.

Elements & Sub Elements	Good	Adequate	Not Adequate
Access			
Air			
Road			
Sea			
Airports			
Seaport			
Access Costs			
Access Restrictions (Open Skys etc)			
Entry			
Visa			
Immigration & Customers			
Language & Signage			
Role of Embassies			
Institutional Structures and Framework			
Ministry of Tourism and Antiquities			
Minister of Finance			
National Tourism Authority (JTB)			
Public Agencies supporting Tourism			
Training			
Investment			
Regulatory			
Heritage and Culture			
Sub-National Structures (Regional Authorities)			
Community/Local Bodies			
Regulatory and Business Environment			
Tourism and Business generally			
Supportive Legal Framework			
Dispute Resolution Legislation			
Company Law			

Elements & Sub Elements	Good	Adequate	Not Adequate
Product			
Compliance with 6 pillar elements			
Accommodation Range/Quality			
Food			
Internal Transport			
Things to see and do			
Night Activity			
Tourism Services			
Range & Diversity			
Marketability			
Niche Priorities			
Culture and Heritage			
Religious			
Medical and Wellness			
Educational			
Eco			
MICE			
Family			
Short Break			
Events			
Marketing			
Research			
Image			
Target Markets			
Methodologies			
International Tour Operator Network			
Security			
General Security			
Local Crime			
Visitor rip offs			
Medical Security			
Partnership			
Trade Maturity Level			
Decision making capacity of partnerships			
Public/Private Partnerships			
Public/Public Partnerships			
Capacity			
Plans in Place			
Skills in Place			
Management Training			
Marketing Training			
Technical & Craft Training			

Market Driving Elements:

Elements & Sub Elements	Good	Adequate	Not Adequate
Investment			
Strategy			
Regional Spread			
Incentives			
Foreign Investment and Promotion			
Competitiveness			
Performance on competitive set			
Value & Price competitiveness			
Other competitive issues			
Distribution and Sales Network			
Penetration in markets			
Tour Operator Network			
Marketing			
Image of Jordan			
Positioning			
Market selection, priority and balance			
Marketing Policy			

Elements & Sub Elements	Good	Adequate	Not Adequate
Marketing Support			
Trade Services			
Literature and sales aids			
Trade to Trade Selling			
Educationals and familiarisation			
Providing info and intelligence to industry			
Planning			
All aspects			
Technology			
Functionality, quality and friendliness of site			
Trade aspects of site			
Innovation			
All aspects			
Information			
Provision of information for decision-making			
Integration			
All aspects			

Annex VI – Summary of meetings with the Minister and SSC

Meeting with H.E. Dr. Taleb Rifa'i, Minister for Tourism and Antiquities.

The representation from AMIR, which included Steve Wade, Programme Director and Ibrahim Osta, BMI Component Leader, and the Consultants, Matt McNulty and Sean Browne were accompanied by a high level delegation from USAID, including Jon Lindborrg, Director, Economic Opportunities Office, Jim Barnhart, Deputy Director, Economic Opportunities Office and Jamal Al-Jabiri, Project Management Specialist, USAID.

The issue of concern was the threat of a further worsening in the relationship between JTB and RJ. This would, if not corrected, diminish or destroy the possibilities for the key foundation partnership in the sector between National Tourist Board and National Carrier. The AMIR / USAID Team made their concerns and the implied dangers clear to H.E. Dr. Taleb Rifa'i, and he responded with his analysis and undertaking that he planned to call a high level meeting, to ensure that a basis for partnership and co-working was established.

Further points discussed with the Minister focused on next steps and the operation of the process now getting underway.

The Minister was also briefed on proposed action areas that would necessarily require additional funds.

These included:-

- The short term 2003 Tactical Bridge Strategy.
- The market securitisation of the tour operator network in Europe and USA, where it would be necessary for JTB to financially support their retention in programmes.
- Measures to overcome the “fear factor”, particularly the upscaling of journalistic visits and publicity in media.

H.E. Dr. Taleb Rifa'i, the Minister for Tourism and Antiquities requested that AMIR might provide him with documents, setting out and supporting these issues, in the context of the return to growth plan and the strategy 2004 – 2010.

Meeting with Committee Chairs and Members of Steering Group

The purpose of the meeting was to:-

- Debrief the Senior Members post Petra.
- To propose how the 2003 Return to Growth Tactical Bridge Strategy would be dealt with.
- To set the context for their committee meetings and deal with any clarifications and questions.

- To outline AMIR's support to the committees.
- To introduce Bassam Kanaan, who had been proposed as chair of the Human Resource Committee.

Following a discussion the following outcomes were agreed:-

- Product Development Committee would meet first to be followed by Marketing. Human Resources and Institutional Framework would hold until these had advanced.
- AMIR could best support the work of the committees by strengthening the Secretariat, and by providing each Chairman in advance, with a proposed agenda and PowerPoint slides to focus the discussion. This was agreed.
- The 2003 Return to Growth Tactical Bridge Plan would be handled by JTB and AMIR Consultants. The chairs of the committees would be kept in the picture, but the committees would not be involved – they would concentrate on 2004 – 2010.

Following extensive requests for clarifications during the meeting, the AMIR Team concluded afterwards that for the avoidance of doubt on settled issues, to provide guidance and to diminish wasted effort, they would create and provide a detailed ring binder manual.

Annex VII – Familiarisation (list of visited sites)

As part of the Familiarisation Programme, the Consultants travelled to see the following sites:

- Ajloun Castle
- City of Jerash
- Petra
- Little Petra
- Taybet Zaman Village (Sofitel Hotel)
- Wadi Rum (the new visitor centre construction and desert product)
- Aqaba - Aqaba Special Economic Zone Authority (ASEZA)
- Royal Diving Centre - Aqaba
- Royal Yacht Club – Aqaba
- Hotels in Aqaba - Raddisson SAS & Movenpick
- Airports – Aqaba, Marka and Queen Alia airport
- Aqaba development area

Annex VIII – List of Meetings

*Denotes multiple meetings during the Mission.

*H.E. Dr. Taleb Rifa'i, Minister for Tourism and Antiquities.

*Steve Wade, Head of AMIR Programme

*Ibrahim Osta, BMI Component Leader, AMIR

*Diala Khamra, BMI Business Management Specialist AMIR

*Cathryn Goddard, Coverdale

*Orla Braningan, Tourism Marketing Specialist.

*Sean Browne, Tourism Product Development Specialist.

*Marwan Khoury, Managing Director, JTB

*Malia Asfour, Vice President, North America, JTB

*Nadeen Muasher

*Steering Committee/Chairmen

Annex IX - Petra Retreat Attendees

Taleb Rifa'i	Ministry of Tourism & Antiquities
Sultan Abu-Jaber	Ministry of Tourism & Antiquities
Fouad Aghabi	Ministry of Tourism & Antiquities
Hesham Al-Abbadi	Ministry of Tourism & Antiquities
Nisreen Qaryouti	Ministry of Tourism & Antiquities
Habeeb Habash	Ministry of Tourism & Antiquities
May Al-Shaer	Petra Conservation Authority
Marwan Khoury	Jordan Tourism Board
Waleed Muhajer	Jordan Tourism Board
Malia Asfour	Jordan Tourism Board
Hussein Dabbas	Royal Jordanian
Khaldoun Shawwa	Royal Jordanian
Shehadeh Abu-Hudeib	Petra Regional Planning Council
Imad Fakhouri	ASEZA
Lina Omar	ASEZA
Suleiman Farajat	Petra Archaeological Park
Maher Ghanma	Office of Her Majesty Queen Rania Al-Abdullah
Yassera Ghosheh	The Royal Hashemite Court
Jumana Salti	Royal Hashemite Court
Khaled Irani	Royal Society for the Conservation of Nature
Chris Johnson	Royal Society for the Conservation of Nature
Nadim Mouasher	Arab International Hotels
Bassam Maayeh	Business Tourism Company
Samer Mouasher	Discovery Eco Tourism
Munir Nassar	International Traders
Manar Ghassib	International Traders
Michel Nazzal	Jordan Hotel Association
Shorouq Mubaslat	Jordan Hotel Association
Ammar Kanaan	Ammon College
Ibrahim Osta	AMIR Program
Matt McNulty	AMIR Program
Orla Braningan	AMIR Program
Sean Browne	AMIR Program
Cathryn Goddard	AMIR Program
Nesreen Barakat	AMIR Program
Nissreen Haram	AMIR Program
Diane Scott	AMIR Program
Diala Khamra	AMIR Program
Lina Arafat	AMIR Program
Mutaz Taher	AMIR Program
Dina Al-Jamal	AMIR Program
Ramez Habash	AMIR Program